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SAN DIEGO UNIFIED PORT DISTRICT

MEMORANDUM

Date: November 1, 2016

To: Board of Port Commissioners

From: Bella Heule
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Subject: *Fulfilling the Public Trust*
Integrated Marketing, Branding and Communications Plan

Staff delivered an informational presentation on an integrated marketing, branding and communications strategy at the Board Meeting held on Thursday, September 8. The intent was to inform as well as solicit direction from the Board. In response to feedback received, Staff has compiled this memo to provide further background on the topic, address questions raised by Commissioners during the Board Meeting, and provide additional details on the Port's brand strategy.

Background

The first goal of the Port of San Diego's Compass Strategic Plan (CSP) is *"A Port that the Public understands, trusts, and values."* A more robust marketing, branding and communications strategy will support this goal by integrating outreach efforts into a cohesive narrative- the Port of San Diego's story. A tactic under this goal (1.2) is to "increase understanding of the District's mission, identity, and social and economic impact." In order for the public to understand the District's identity and impact, we need to be out telling our story – and what a good story we have to tell the public - in a strategic and intentional manner.

Goal #3 in the Port's Compass Strategic Plan (*"A vibrant waterfront destination where residents and visitors converge")* lists several tactics that further address a more robust marketing, branding and communications strategy:

- Market and improve the District's cruise industry offerings – 3.1, CSP
- Market District Tidelands as a tourist destination – 3.2, CSP
- Promote tourism and business offerings for residents, visitors, and local community with measurable initiatives – 3.3, CSP
- Increase and promote event and venues for safe waterside activities and recreation – 3.5, CSP
- Increase awareness of public access opportunities around the District – 3.10, CSP

The Port's current marketing efforts have been more tactical in nature and have not been managed with a strategic, comprehensive system. Initiatives suffer from inconsistency, spending below minimum effectiveness levels, and a lack of performance measurement and tracking.

Despite recent post-recession growth, the Port has not reengaged marketing spend to pre-recession levels. The last five years' (FY2013-2017) marketing and communications annual NPE budget average was approximately $1,900,000. The previous five years' (FY2008-2012) marketing and communications annual NPE budget average was $3,137,000. This represents an approximate 40% decrease in pre-recession spending on these efforts.

Despite the decrease in funding, the Port has been able to maintain positive exposure due mostly to, among other initiatives, high profile projects such as the Chula Vista Bayfront, Central Embarcadero, and Harbor Island redevelopment projects. But this outreach has been mostly to highly informed residents who actively engage with local news media. Additionally, the Port needs to be vigilant and proactive to the degree that the public's opinions of the Port could be easily shaped in the future by negative articles or attack advertisements. Having a foundation of facts about the Port and its role in the local economy would allow citizens to better assess the value and meaning of Port-related articles.

There is opportunity to increase goodwill and positive sentiment and leverage the visibility of projects on a much larger scale with a strategic approach to our marketing and communications. Relying on past reputation does not always ensure success in the future. The Port needs to lock in this potential positive shift in perception amongst highly informed San Diegans and expand its reach to less engaged residents. The Port needs to remain relevant and transparent with stakeholders and keep up with the changing landscape of our industry and community.

<u>Responses to Board Questions</u>

Q: What is the value of people knowing about the Port and how does it translate to a return on investment?

A: While the Port of San Diego is a public sector organization, our unique business model relies on private sector type revenue generation rather than the traditional tax model. This model does not provide the same level of security that a guaranteed tax base might, but it does enable us to increase revenue through entrepreneurial efforts.

On the real estate side, revenue generation is directly tied to the financial success of our tenants. We therefore have a vested interest in helping our tenants realize their full potential of increasing visitor draw and maximizing visitor spend.

Subject: Fulfilling the Public Trust: Integrated Marketing, Branding and Communications Plan

In the maritime sector, competition for cargo and cruise is fierce. The ability to differentiate our Port's services and infrastructure, and execute targeted marketing campaigns to potential customers and tenants, is vital to our success.

CASE STUDY: In 2007 the Port of Long Beach (POLB) submitted an important EIR for City Council approval. Because the POLB was viewed as "not being a responsible business partner", City Council denied approval. This was the impetus for the POLB to rebrand with a focus on transparency and understanding through education and information, implementing its green port policy, investing in innovative technology, and creating and sustaining jobs. With an approximate $1 million investment in its brand each year over the next 10 years and with a commitment to community and stakeholder engagement, the POLB realized measurable positive impact in terms of increased awareness and more importantly, favorability. According to POLB Community Relations Manager Mario Gonzalez, their investment in communications and brand strategy increased favorability which directly permitted them to invest $4B in infrastructure, in turn driving revenues. (See Attachment A).

Port of
LONG BEACH
The Green Port

Promise

In 2007, the Port of Long Beach had established itself as one of the largest, busiest ports in the United States. But it wasn't achieving the kind of success that it wanted. Facing skepticism and opposition from the surrounding community was putting pressure on the port's ability to achieve its business and economic goals. The port asked itself, "What is the Port of Long Beach? A community partner? An economic engine? An environmental steward? All of the above?"

Art Wong, assistant director of communications at the Port of Long Beach, had worked at the port for about 16 years and was part of the internal process to look at the port's personality, values and brand. That process followed the port's decision in January 2005 to adopt its Green Port Policy, and the port eventually adopted The Green Port as its brand.

"We're still a port, but we have expanded what we see a port as," said Wong. "We're not just the one or two things we were before. We're bolder and more inclusive."

The port believes that integrating economic and environmental interests helps every member of the local and trade communities flourish, and the port wants to be known as "a catalyst for a vibrant Long Beach." The port wants people to think about "an idea, not a function" when the port comes to mind.

Wong said that there was initially some caution within the maritime industry that this new focus would divert attention, but the organization made the connection between protecting the environment and having a vibrant community.

"You have to succeed in business to have a community that's livable and happy," said Wong. "If we're going to impact people, it should be in a positive way."

The port puts its brand in action in advertising, publications, presentations, multimedia, educational programs and community events, and it relies heavily on its employees to live out the brand promise.

"People who come to us [to join the staff] want to be part of that promise," said Wong.

Q: What are the relevant metrics - especially related to targets or expectations for payback and Return on Investment (ROI)?

A: The function of marketing is to increase sales in the short term while building reputation in the long term.

Category Growth

"A rising tide lifts all ships." Due to macro-economics, market/consumer trends, pricing factors, collective marketing efforts and/or all of the above, if the category of a product or service is growing, all of the participants in that category should benefit. In tourism, the Port benefits from the categorical work done by the San Diego Tourism Authority (SDTA). Their job, and budget, is to draw more visitors to the San Diego region. The more visitors that come to San Diego, the more the Port, the city, Mission Bay, hotels, retailers, and individual business will likely benefit. While the Port and its budget may not be effective in lifting any of its categorical sales, it should remain well aligned and contribute to those efforts that build the categories in which the Port participates. Conversely, if a particular category is falling in sales, the job of the Port to grow its revenues will be harder.

Share of Market and "Fair Share of Market"

A common measurement of marketing is the rate a business is growing relative to its position or share of the category in which it competes. An example for the Port is to not just look at the absolute business being generated by its 18 hotel tenants, but also how they are doing individually or collectively, relative to all hotels in the San Diego region. If the Port's 18 hotels represented 18% of all the hotels in the region, then the Port should expect to receive a "fair share" or 18% of the visitors/revenues from all of the hotels, or the total category sales. If the Port was achieving less than 10% of category revenues, then we would be achieving less than fair share. If the Port were achieving 25% of category revenues then we would be achieving greater than fair share. The “fair share” principle can also be applied to occupancy rates, Revenue per Available Room (RevPAR), etc.

Share and Fair Share by Segment

The same principle can also be applied to analyzing and developing market share by particular segments of an overall category: e.g. premium hotels, mainstay hotels, low-cost hotels. Both product development and marketing can help develop and accelerate equal or greater than fair share of market overall or for a particular market segment.

New business areas

A strategic goal at the Port is to diversify our revenue sources. In addition to managing business in existing, core product lines, a company can and should in parallel grow its business by entering new lines of business, ideally in categories where the overall category growth rate is expected to be higher than the current lines of business that may have more mature/slower compound annual growth rates (CAGRs). Mature categories tend to grow at 3-5% CAGRs; faster growing categories grow at 10 -20% CAGRs; new categories can grow at greater than 25% CAGRs.

Variable concessions generate $73 million, or 42%, of the Port’s total budgeted revenue. The ability to meet or exceed our forecast comes from driving more guests to our various tourism businesses. Increasing that demand and ensuring that the Port is gaining equal or greater than fair share of the total San Diego tourism guests/revenue is driven by both the Port and tenant marketing activities.

Businesses can sustain growth best by managing a portfolio of activities across these basic marketing functions/levers, thus reducing dependency on any one lever for growth. With the introduction and evolution of the digital world and internet, only focusing on traditional ROI relative to marketing, branding and communications initiatives isn’t enough. It’s no longer just about a return on investment, but returns on engagement, objectives and opportunity:

- Return on Impression (eyeballs and perception = how many people see us and what their emotional connection is)
- Return on Opportunity (indirect marketing opportunities that are created when information is discussed and shared)
- Return on Engagement (how and how often people engage with our properties, services, content and brand)
- Return on Objectives (not always measured with hard data, but helps us know we are heading in the right direction)

In addition to revenue growth for business lines that the brand strategy supports, our overall strategy will include measuring the awareness, perception, engagement in and favorability of the Port. A baseline study will provide the foundation against which future results will be measured. It will also help identify target audiences for which messaging and creative can be crafted to be more relevant and meaningful.

A variety of metrics will be utilized to determine the success of specific campaigns. For example, click through rates determined digital and social ad effectiveness of the Central Embarcadero Request for Proposal campaign. Social media engagement, as well as website visits, Planet Bids registrations and downloads, and Open House and Board meeting attendance were also tracked.

Metrics are an important tool for benchmarking and measuring success. It is important we identify metrics for each initiative and consistently track them over time. Below are some details of brand performance metrics we have identified.

Brand Performance Metrics	
Brand Impact	
	Brand Awareness *(aided and unaided familiarity)*
	Brand Perception *(sentiment - positive/negative/neutral)*
	Brand Affinity *(likelihood to recommend)*
Visitor Traffic and Spending	
	Average Number of Visitors *(per day, week and month)*
	Trip Frequency *(multiple trip visitors)*
	Spending Visitors *(Number of visitors spending money)*
	Spend per Visitor *(Average amound spent)*
Revenue	
	Tourism Tenant Generated Revenue
	Maritime Generated Revenue
	Sub-Brand Generated Revenue*
Media Exposure	
	Paid vs. Earned Media
	Social Media Engagement
	Website Traffic

** Sub-brands would include Aquaculture @ The Port; Parking @ The Port; Harbor Police @ The Port; etc.*

Subject: Fulfilling the Public Trust: Integrated Marketing, Branding and Communications Plan

CASE STUDY: Port staff contacted *amsterdam marketing* CEO Frans van der Avert who shared that the "I Amsterdam" story and logo were launched in 2004 in an effort to reunite different marketing foundations that were busy selling Amsterdam for tourism, business, conventions, culture etc. They merged these companies in 2012 and launched *amsterdam marketing* in 2013.

When they started, the City of Amsterdam created a dashboard with Key Performance Indicators for three of their target groups: visitors, businesses and inhabitants.

Their annual marketing budget is 12 million Euros, of which one third is funded by the City of Amsterdam.

Van der Avert said I Amsterdam is not a campaign; it is a slogan/logo. He claims they are doing very well with metrics indicating that the number of visitors doubled in five years, business investment rose to number three in Europe, and the logo has been embraced by all 1,200 partners. (See Attachment B)

Q: How is data relevant? Why does it help to have data?

A: As Peter Drucker said, "What gets measured gets managed."

Data serves the Marketing and Communications Department (MarCom) in its continuing efforts to strengthen communication and community engagement between the Port and local residents, tenants and visitors. In broader terms, the Port can use the information gathered across a number of platforms to make sound, strategic decisions in a variety of areas including community outreach, activation, public education, marketing, planning, and budgeting. The continual measurement of the effectiveness of initiatives allows the Port to constantly improve and evolve key programs.

Knowing to whom to market and how to capture the attention of a target audience takes research and analysis.

Subject: Fulfilling the Public Trust: Integrated Marketing, Branding and Communications Plan

The South County Economic Development Corporation (SCEDC) and economic development representatives from the majority of our member cities met with the Port's MarCom department last month to discuss the perception that, despite the wonderful attractions and amenities offered in South County, low awareness and favorability negatively impacts their image. Shifting the perception to a more positive one would drive economic activity not only for South Bay but also for the Port.

Data derived from questions like these provide the information needed to develop enhanced communication strategies in terms of both content and methods: How aware are residents and visitors of South Bay and its offerings? How do they perceive the region? What sources of information do residents/tenants/visitors depend on for information about each South Bay city? What methods are most effective in communicating with them?

Answers to these questions in addition to asking the same about the Port would be helpful as we strategize means to draw increased visitors to South Bay properties. The South County contingent and MarCom plan to reconvene to discuss a potential collaboration and next steps regarding research and co-promotion opportunities for mutual benefits.

Q: Why does public awareness/recognition matter? What does it mean/matter to be recognized more or less than other public agencies?

A: Many members of the public and non-profit sectors are disinclined to believe that they face competition. Funding limitations coupled with increased regional, national and international competition is opening their minds to the need for branding and positioning. This realization highlights the fact that strategic identity and branding can significantly help organizations achieve increased program awareness, utilization and satisfaction.

Brand recognition or identity grows as an organization is associated with positive impact. If a public agency states a position on something, people react, and the public forms an opinion. This cycle occurs over and over. And the ever-evolving brand is impacted.

There is distinction between government branding and branding in the private sector: the former is about trust and the latter usually comes down to profit. As the Port invests in its 'trust bank' establishing a positive and distinct reputation for trustworthiness and values, it builds advocates that provide support in challenging times.

CASE STUDY: The Port of Tampa suffered from a lack of identity, awareness and understanding. The tragic events of September 11, 2001 restricted access to the Port, projecting an image of an 'unapproachable, mysterious Port'. The following report from the Association of American Port Authorities (AAPA) describes their process.

PORT TAMPA BAY

Look

Port Tampa Bay President & CEO Paul Anderson came to the organization in 2013 with a strategic vision to rebuild the port's brand.

"I don't know how many people want to do business with an authority. They want to do business with a business," he said. "I wanted us to look and feel like a global business entity."

So in early 2014, the Tampa Port Authority began doing business as Port Tampa Bay, with a new logo and look for the organization's website, business cards, social media outlets, signage and marketing materials. The new name was chosen to reflect the port's reach beyond the city of Tampa to a large population corridor centered around Interstate 4 and to bring the port better in line with a strong local identity. The region's professional sports teams – the Buccaneers (NFL), Devil Rays (MLB) and Lightning (NHL) – had all adopted the "Tampa Bay" moniker, and the local Pulitzer Prize-winning newspaper, the St. Petersburg Times, had rebranded itself as the Tampa Bay Times.

Anderson created the position of Vice President, Branding and Strategic Alliances, within the organization, a move that enabled the port to handle most of the rebranding effort in house, saving significantly over hiring expensive outside firms for strategic advice. While Port Tampa Bay still used some local firms to develop potential logos and color schemes, most of the work was done in-house. Keeping much of the work on staff also enabled the port to move quickly and be nimble in its decision-making.

The response has been very positive, especially within the local business community. The convention and visitors bureau, chamber of commerce, economic development council and the regionally-focused Tampa Bay Partnership have all embraced the new face of the port.

Port Tampa Bay also made its employees a big part of its new brand. The new name and logo were announced at the port's 2014 State of the Port, and prior to the event, all employees were at a preview where the new look of the organization was unveiled to them as port staff. While the staff were attending the off-site event, others were busy at the port offices, switching out logos on doors and elevators and replacing business cards for all staff with those using the new logo, name and color scheme.

"Employee buy-in is critical," said Anderson.

Port staff interviewed Karl Strauch, Vice President Branding and Strategic Alliances, about the return on investment related to the rebrand. He shared that they project a return on investment in 3-5 years of their initial rebrand launch. However, he directly attributes their success to win significant State and Federal grand awards to the increased awareness, understanding and favorability generated by the rebrand launch. Through ongoing branded messaging and outreach, familiarization tours and improved storytelling, elected officials, community leaders and the public at large now better understand the economic impact and benefits the Port contributes and they have created Port Tampa Bay ambassadors and enthusiasts.

Q: Why would we want to do marketing to increase international (cargo) trade?

A: A positive image of the Port within the global maritime industry, international trade market, and the local and regional community helps with business attraction and retention - the measure of success for the Maritime Trade Department.

The long-term Maritime Trade business plan is designed around the principal objective to expand maritime business and trade. Methods to accomplish this objective include retaining and growing our current customer base, optimizing throughput at terminals within the Port's core business specialties; growing high value imports by expanding business to potential customers within our core business specialties; and increasing export volumes by developing new business opportunities leveraging partnerships.

An integrated marketing, branding and communications plan for this critical business line is designed to support these efforts with a full suite of collateral materials, messaging, and media that will enhance the Maritime Trade team's ability to meet their objective. A diverse array of marketing strategies allows the team to reach the primary target audience, cargo owners, liners, brokers, and other decision-makers in the cargo shipping industry. Strategies include targeted direct marketing pieces, trade industry publication ads, digital promotion, and trade show participation. In fact, the Port's competition is currently using all of these tools to talk to our potential customers.

CASE STUDY: Not only are branded collateral and promotional tools important, but the level of service that delivers on the brand promise is as important. The Georgia Ports Authority focused on the element of 'experience' to differentiate themselves from other ports.

Subject: Fulfilling the Public Trust: Integrated Marketing, Branding and Communications Plan

Experience

Many consumer companies utilize brand ambassadors, third parties who are often paid to be a spokesperson or public face of a consumer company. The Georgia Ports Authority doesn't pay any celebrities to speak on behalf of the organization, but it has launched a campaign highlighting the experience the port delivers by using third parties. "In Their Own Words" is a multimedia advertising effort using unscripted testimonials from port customers to solidify the port's brand.

"We want our customers to expect service excellence," said Executive Director Curtis Foltz. "Regardless of external forces, we want them to count on us."

Experience as a brand element is the hardest to control. "It can be a wild card," said brand expert Kaiser.

Foltz has sought to make experience with Georgia "reliable." He said the port takes a holistic view of how customers should be serviced – taking into account the vessel, terminal, road access, technology interface and domestic transportation.

"We put the customer hat on and try to give them a first-in-class experience," said Foltz.

The port is always seeking customer feedback on the experience it is providing – within the commercial organization and from the port's customer service group through its client relations center. The feedback is perpetual and it is multifaceted.

Foltz said that the organization has embraced a culture of allowing decision-making at the front line level, which enables the port to be nimble and responsive when it received feedback.

Georgia Ports Authority has also embraced the role of being a conduit with outside groups – lobbying for the industry, trying to make a favorable experience for its customers and trying as an organization to "fly above the fray," said Foltz.

The efforts seem to be working. The port touts testimonials from its customers such as, "They've done a great job embracing the ocean carrier markets and making sure they are doing all of the things to bring in more services." And business is booming as well. The port ended 2014 with a 10.2 percent increase in its handling of containers.

"The results speak for themselves," said Foltz.

Q: What are the Port's new lines of business and why would we need to promote them? What value does promoting new lines of business have to us as a port?

A: At the direction of the Board of Port Commissioners, the Port is undergoing possibly the most aggressive transformation in its history with a goal to diversify its revenue streams in order to reduce risk and increase sustainability. In just the past 11 months, in addition to growing core lines of business such as Maritime and Real Estate, our *Port as a Service* department added new lines of business to include among others Aquaculture and Parking.

Parking, budgeted at $17 million in revenue, represents the fastest growing business at the Port with a 43% increase year over year, while maintaining the lowest cost structure. Increasing demand through marketing, and ensuring that the Port is gaining optimal occupancy rates at slightly below market rate average, is critical to the growth of this business. In the next 12 months, staff will test marketing campaigns designed to increase demand, resulting in increased revenues collected directly by the Port.

Question (Q): Why does consumer awareness matter?

Answer (A): Consumer awareness is important because it increases a current or potential customer's knowledge about a product or service, allowing him/her to make a more informed purchase or decision. Increasing consumer awareness also allows business owners to share background information about their organizations, their values and their practices.

According to a recent study conducted by Siegel+Gale, business decision-makers are more likely to consider brands that consumers know (awareness) and to which they feel connected (affinity). The study was based on a global survey of nearly 10,000 business decision-makers. In addition to increased likelihood of purchase, higher consumer awareness was also linked to better financial performance. Out of nearly 500 business to business (B2B) brands, the ten most well-known (highest consumer awareness) had 27% more growth in stock value and 31% greater revenue growth during a three-year period from 2010 to 2013, compared to the ten least well-known B2B brands.

The greater the transparency and the more the Port imparts relevant information, the stronger the trust, loyalty and engagement on the B2B side with tenants and businesses. The same holds true for the Business to Consumer side with the public at large.

From a visitor perspective, the Port faces competition not only from other Southern California and San Diego destinations and attractions, but also from the lure to stay at home rather than enjoy out-of-home experiences. The Port also does not register as a 'destination' in itself in that people are not likely to say "let's go spend the day at the Port."

The more people become familiar and gain affinity with the Port's offerings, the more they will avail themselves of our assets and services, resulting in our ability to better serve The People per our mandate while generating revenues for our tenants and in turn for the Port.

Q: Why would it matter to anyone that a particular restaurant or hotel is a Port property? What would be the value in our tenant patrons' awareness that the tenant's operation is on Port property?

A: In the words of Hultink and Hart (1998), 'the world will not automatically beat a path to the door of a better mousetrap'. Rather, the advantages of new developments and options must be communicated compellingly and meaningfully to the public. Successful development is achieved when people – through marketing and branding - become aware of the existence of new properties and recognize that they possess real benefits.

There are reciprocal benefits for our tenants and the Port to the public having a broad understanding of the Port and its tenants. When people identify businesses as being part of the Port, the association can increase positive sentiment for the entire Tidelands. The power of a collective sense of community and positive experience will have an impact on the overall sentiment of the Port and its tenants.

Some tenants recently expressed an informal interest to co-brand their properties and services with the Port. The tenant who volunteered the idea believes that having the Port logo and indication that the business is a Port tenant would lend credibility to the tenant business. The tenant cited that the benefit to the Port would be increased clarification and promotion of the Port's physical and influential reach.

CASE STUDY:

Barcelona added a new verb to the Spanish language to highlight changes in the character of its once infamous inner city Raval district. The aim is to attract new visitors to the district, create pride of belonging amongst its residents and help develop a new brand image for the neighborhood.

Rebranding: simply add a new verb to the language

The Barcelona City Council wants to improve the perception of one of its most marginal and insecure inner city districts: the Raval. The campaign seeks to project a more cohesive image of the neighborhood but without losing its characteristic identity and personality.

The aim is to attract new visitors to the district and create a pride of belonging amongst its residents. The proposal to introduce a new verb, ***Ravalear*** (***Ravalejar*** in Catalan), is meant to create a brand personality for the neighborhood: a way of life, of feeling, of doing things. The verb represents the edgy attitude and nervous energy of the Raval, is deliberately ill-defined and meant to be interpreted in an individual way. To *Ravalejar*, simply visit and take in the atmosphere of the Raval and have fun in the wide range of bars and clubs.

Q: What is an over-arching platform as it relates to this subject?

A: It is the comprehensive suite of messages and tools that are used to tell the Port's story, and that connect the various lines of business, engagement and awareness efforts, and associated marketing and communications. Please refer to Our Strategy below.

Our Strategy

In order to demonstrate progress attributed to our marketing, branding and communications strategy, MarCom has selected four measurable initiatives on which to focus and where we are confident to be able to 'move the needle' over the next 12 months.

Real Estate: Marketing initiatives and investment in Bayfront tourism will be designed to drive incremental concessions lift beyond what our tenants and the SDTA might achieve. For example, if a $500,000 investment in tourism can generate incremental concessions of $2 million or greater, that is a four times return on investment.

Staff will work closely with the SCEDC and South Bay cities, at their request, to help raise the awareness and favorability of this area in turn driving an increase in visitors and recreational activities. To stimulate concessions in other Bayfront areas, and at the request of Port tenants, we will undertake a co-branding and marketing campaign which will be mutually beneficial for the Port and our tenants. Finally, staff will study trends and opportunities relative to increasing event activity during off-season in areas identified for potential concession growth. This will be measured by increased number of visitors and concessions revenues determined by traffic counts and tenant partner reports.

New Business – Parking @ The Port: Staff will develop test campaigns promoting the Port's parking initiatives with the goal of increasing revenues. Parking @ The Port is a new line of business that has potential to grow the Port's revenues over time. It's imperative that our marketing efforts drive demand to ensure occupancy rates are at optimal levels. Staff will test promotional campaigns and paid media efforts over the next 12 months to determine the return on spend and measure effectiveness for potential future campaigns.

Maritime: At approximately $38 million in revenues, the Maritime division is a major contributor to the Port's financial sustainability. Increased competition and industry challenges require the Port to be more strategic, diligent and creative in its marketing and communications efforts. In order to attract liner and inducement cargo as well as cruise liner business, staff recommends increased resources such as Spanish language collateral, targeted promotions in industry publications, and improved trade show presence (more trade shows and better displays). On the cruise side, staff plans to influence an audience we have not yet diligently approached – the travel agent sector - that could drive consumer awareness and, in turn, liner business to our Port. Tactics include investing resources in better marketing San Diego as a cruise destination by highlighting benefits of Port amenities, parking and attractions; promotion in industry publications; and sponsoring and speaking at travel agent industry certification programs, seminar, conferences and trade shows. It is estimated that a return on investment may be demonstrated within 24-36 months, as this is a longer term sales cycle.

Subject: Fulfilling the Public Trust: Integrated Marketing, Branding and Communications Plan

Reputation Management: The Port over the past year has been driving momentum in program launch, progress and completion, lending to highly positive media and public relations. We are riding a wave of greater awareness and, for the most part, favorability. Yet issues such as gentrification, environmental protection, land use and planning and so many other factors can turn our situation on a dime, unless we build confidence in our image as a responsible partner to the public and business community. Increased transparency through community and educational outreach is key to our ability to sustain a reputation as a regional leader fulfilling the public trust in the 21st century. Staff firmly believes that now is the time to emphasize and build on our goodwill to do the greatest good by doing remarkably well.

The below summarizes the key initiatives, implementation strategies and associated metrics and funding.

INITIATIVE	STRATEGY	METRIC	FY17
Real Estate: Accelerate Real Estate concessions revenue by driving more visitors to the Bayfront	1. South Bay: SCEDC & South Bay cities co-brand/marketing partnership (split investment; *represents Port's estimated portion)	Increased South Bay Park concessions revenues measured by partner tenant reports	Research: $25,000* (South Bay only) Promotion: $93,000
	2. Central & North Bay: Co-branding/marketing campaign with North and Central Bay-based tenants	Increased visitors to major commercial tourism areas (Embarcadero, Harbor Island, Coronado Bayside, etc.) by 15% in 3 years measured by daily traffic counts taken quarterly and by partner tenant reports	Signage: $200,000
	3. Hold events during off-season in areas of increased concession potential to generate more visitors/patrons	Research and identify events/attractions to draw new audiences	$7,000

Subject: Fulfilling the Public Trust: Integrated Marketing, Branding and Communications Plan

Parking: Increase conversion of traffic into parking by capturing greater share of parking in downtown areas	1. Test the use of paid media coupled with promotional efforts to increase share (i.e. park today at the Hilton Garage and get $5 off next parking stay)	Increased parking revenue Establish a baseline of revenue and measure “lift” above baseline	$20,000
Maritime: Increase cargo liner/inducement revenues as well as cruise revenues	1. Increase cargo prospects and lead conversion a. Collateral: i. Direct marketing campaign for liner/inducement ii. Spanish language materials b. Promotional outreach i. Consistent targeted ad placement in trade publications ii. Targeted participation in more trade shows (current and new)	Increase inducement calls by 5% in 3 years Secure 2% click-through rate on digital campaign, with .5% conversion rate to active leads N/A for liner outcomes until FY 18-19 due to long sales cycle	$60,000
	2. Develop cruise marketing campaign tailored to travel agent segment and cruise line executives a. Campaign development featuring Port amenities, attractions, hotels, parking b. Promotion in industry publications c. Sponsor events at travel agent trade shows, training/certification programs	Increase cruise website traffic by 10% over baseline measured by Google Analytics Secure 3 in-market cruise executive visits and tours N/A for operational outcomes until FY 18-19 due to long sales cycle	$65,000

Reputation Management: Increase transparency and build public trust	1. Deploy multi-pronged communications plan to enhance/manage perceptions of the Port a. Community & Educational Outreach ($75K) i. Broadcast media advertising to promote key Port initiatives ii. Ads in targeted community papers in five member cities iii. Community and Industry Familiarization tours (on and off-water) iv. Speakers Bureau support v. Event activation b. Collateral; videos; displays/banners ($55K)	Increase awareness by 10% over baseline in 3 years measured through quantitative community survey Increase favorability by 5% over baseline in 3 years measured through quantitative community survey Increase perception as regional leaders by 5% over baseline in 5 years measured through qualitative stakeholder focus groups	$130,000
		TOTAL	$600,000

In order to build sustainable campaigns, these initiative impacts and results will be tracked and measured, and adjusted if needed.

At the November 8 Board Meeting, staff will request $600,000 from FY16 unrestricted resources for marketing, branding and communications to be allocated for the remainder ofFY17. We will report out the key metrics on each of the three initiatives and will also track and report out increased revenues in maritime and real estate associated with the marketing initiatives.

Staff is committed to continuing to build the Port's reputation as a regional leader and economic engine as we grow awareness, favorability and revenues. If you have any questions, please contact Bella Heule at bheule@portofsandiego.org or (619) 686-7218.

Attachments:
Attachment A: Port of Long Beach "Community Survey"
Attachment B: I Amsterdam Corporate Presentation
Attachment C: Amsterdam Marketing – The Organization

Public Communications & Perceptions
Survey Research Report

prepared for the
Port of Long Beach

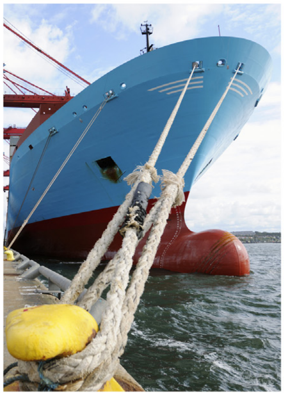

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TABLE OF CONTENTS

List of Tables

List of Figures

INTRODUCTION

The Port of Long Beach is one of the world's leading full-service seaports and a major gateway for trade between the United States, Asia, and the pacific rim. Long Beach is the second busiest port in the U.S., with more than $100 billion in goods making their way through annually, including products imported to meet domestic consumer demand, as well as products exported by American companies to global markets. Port-generated trade supports an estimated 1.4 million jobs throughout the United States, including 316,000 in Southern California, generates approximately $47 billion in total wages and salaries, and contributes to $147 billion in business sales each year.[1]

As a publicly managed agency of the City of Long Beach, one of the key goals of the Port is to enhance communications and community relations as they pertain to the agency. The 2006-2016 Strategic Plan notes that it is "important for the Port to reach out to its core constituencies and to make every effort to foster a spirit of collaboration." Through a comprehensive communications, community relations, and educational outreach program, the Port can "facilitate better understanding among key stakeholders, engage partners to help work toward common goals, and encourage greater public participation in decision making." Toward this end, the Communications and Community Relations Division aims to build and sustain a positive image of the Port of Long Beach within the global maritime industry, international trade market, and the local and regional community in order to retain current business, attract new business, and promote an understanding of and support for Port goals and operations.

PURPOSE OF STUDY The primary purpose this study was to gather information that will aid the Division in its ongoing efforts to strengthen Port-resident communication and community engagement. Are residents aware of the Port and its operations, and how do they perceive the agency? What sources of information do residents rely upon for information about the Port? What are the most effective methods of communicating with residents? Answers to questions like these will provide the Division with the information it needs to develop improved communication strategies in terms of both content and methods. More broadly, the study will provide the Port with information that can be used to make sound, strategic decisions in a variety of areas including community outreach, public education, marketing, planning, and budgeting.

To assist it in this effort, the Port selected True North Research to design the research plan and conduct the study. Broadly defined, the study was designed to:

- Profile residents' awareness, perceptions, and opinions about the Port of Long Beach.
- Measure resident satisfaction with the Port's communication efforts.
- Profile the sources that residents rely upon for information about the Port.
- Profile residents' use of and opinions about publications and programs that are directly managed by the Port.
- Track the findings of prior studies conducted for the Port.
- Gather relevant background and demographic information.

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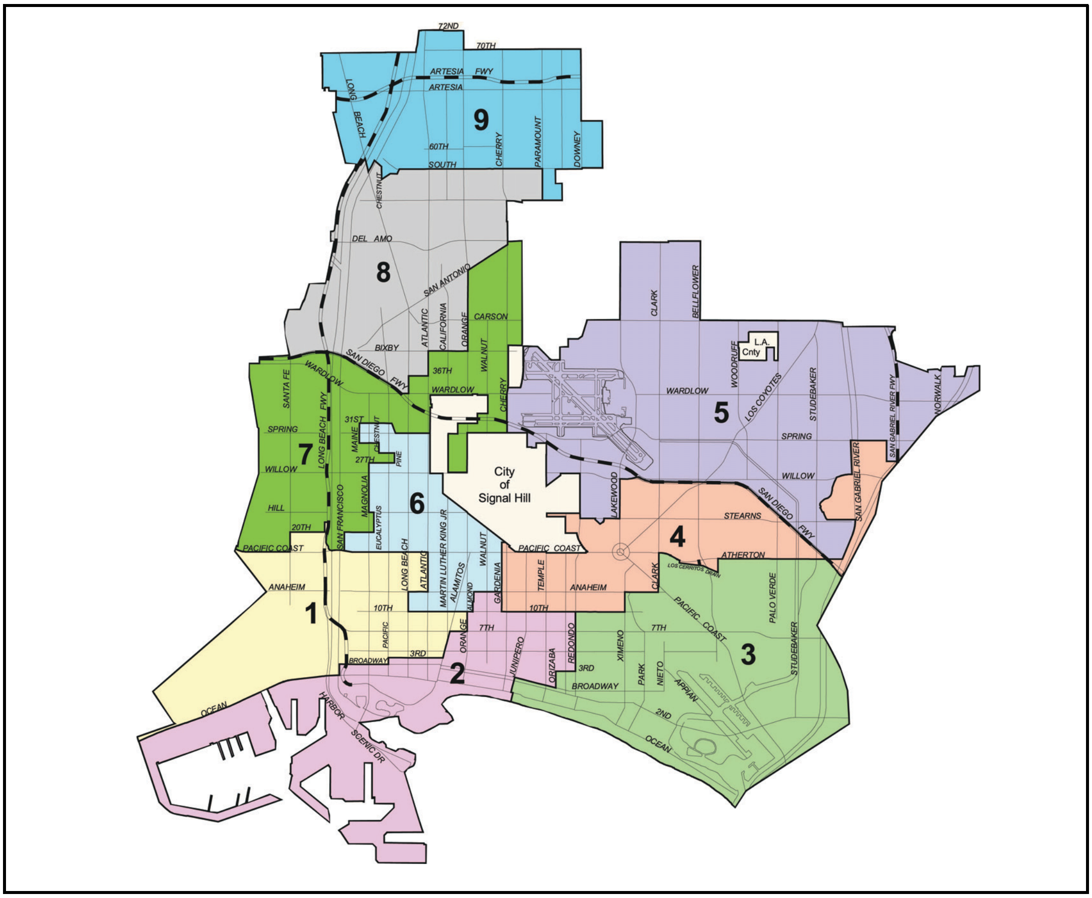
1. Sources: *Economic Impacts: Contributing to the Local, State and National Economies*, distributed by the Port of Long Beach; and the Port's website, *www.polb.com*.

OVERVIEW OF METHODOLOGY A full description of the methodology used for this study is included later in this report (see *Methodology* on page 57). In brief, a total of 1,000 residents who are registered to vote in the City were selected at random using stratified random sampling methods. To accommodate the Port's interest in ensuring a geographically representative sample, voters were selected on a proportional basis from each of the City's nine Council Districts (see Figure 1). Once selected at random, respondents were provided with the opportunity to participate in the survey by telephone or through a secure, password-protected website hosted by True North. Telephone interviews averaged 18 minutes in length and were completed between February 10 and February 21, 2015.

FIGURE 1 CITY OF LONG BEACH COUNCIL DISTRICTS



STATISTICAL SIGNIFICANCE Many of the figures and tables in this report present the results of questions asked in 2015 alongside the results found in the prior 2013, 2012, 2011, 2009, 2008, and 2007 surveys for identical questions. In such cases, True North conducted the appropriate tests of statistical significance to identify changes that likely reflect actual changes in public opinion during this period—as opposed to being due to chance associated with selecting two samples independently and at random. Differences between the 2015 and 2013 studies are identified as *statistically significant* if we can be 95% confident that the differences reflect an actual change in public opinion between the two studies. Statistically significant differences within response categories over time are denoted by the † symbol which appears in the figure next to the appropriate response value for 2015.

ORGANIZATION OF REPORT This report is designed to meet the needs of readers who prefer a summary of the findings as well as those who are interested in the details of the results. For those who seek an overview of the findings, the sections titled *Just the Facts* and *Conclusions* are for you. They provide a summary of the most important factual findings of the survey in bullet-point format and a discussion of their implications. For the interested reader, this section is followed by a more detailed question-by-question discussion of the results from the survey by topic area (see *Table of Contents*), as well as a description of the methodology employed for collecting and analyzing the data. And, for the truly ambitious reader, the questionnaire used for the interviews is contained at the back of this report and a complete set of crosstabulations for the survey results is contained in Appendix A.

ACKNOWLEDGEMENTS True North thanks the staff at the Port of Long Beach who contributed their valuable input during the design stage of this study. Their collective experience and insight improved the overall quality of the research presented here.

DISCLAIMER The statements and conclusions in this report are those of the authors (Dr. Timothy McLarney and Richard Sarles) at True North Research, Inc. and not necessarily those of the Port of Long Beach. Any errors and omissions are the responsibility of the authors.

ABOUT TRUE NORTH True North is a full-service survey research firm that is dedicated to providing public agencies with a clear understanding of the values, perceptions, priorities and concerns of their residents and customers. Through designing and implementing scientific surveys, focus groups and one-on-one interviews, as well as expert interpretation of the findings, True North helps its clients to move with confidence when making strategic decisions in a variety of areas—such as planning, policy evaluation, performance management, organizational development, establishing fiscal priorities, and developing effective public information campaigns.

During their careers, Dr. McLarney (President) and Mr. Sarles (Principal Researcher) have designed and conducted over 900 survey research studies for public agencies, including more than 350 studies for California municipalities and special districts.

Just the Facts

The following is an outline of the main factual findings from the survey. For the reader's convenience, we have organized the findings according to the section titles used in the body of this report. Thus, if you would like to learn more about a particular finding, simply turn to the appropriate report section.

QUALITY OF LIFE & LOCAL ISSUES

- Most respondents shared very favorable opinions of the quality of life in Long Beach in 2015, with 26% reporting it is 'excellent' and 52% stating it is 'good'. An additional 18% rated the overall quality of life as 'fair', whereas just 4% of residents used 'poor' or 'very poor' to describe the quality of life in Long Beach.
- When asked to indicate the one thing that local government could change to make Long Beach a better place to live, just over one-fifth of respondents said they could not think of anything to change (20%) or that no changes were needed (1%). Among specific changes mentioned, the most common were improving police/public safety (10%), improving parking (7%), improving the local economy and job opportunities (6%), addressing the homeless issue (6%), and improving/repairing streets and roads (6%).
- Of the seven issues tested, protecting and improving the local economy received the highest percentage of respondents who said the issue was at least very important (88%), followed by improving education (87%), creating good paying, local jobs (86%), protecting the environment (85%), improving public safety (84%), making sure our shipping ports are safe and secure (84%), and reducing traffic congestion (57%).

GENERAL INFORMATION SOURCES

- Nearly half (46%) of Long Beach residents indicated in 2015 that they *primarily* rely on the Internet for information about news and events in the City of Long Beach, whereas one-quarter (25%) primarily rely on television, and 24% primarily rely on a newspaper. Less than 3% of respondents cited radio as their primary source for information about news and events in Long Beach.
- In terms of *frequency* of use, the most frequently utilized source of information in 2015 is television news, with 65% of Long Beach voters indicating that they utilize this source on a weekly basis. Other frequently used sources are Google or Yahoo! (64%), Facebook (45%), radio news (44%), YouTube (34%), the *Long Beach Press Telegram* (32%), *Los Angeles Times* (26%), and the *Downtown* and *Grunion Gazettes* (17%).
- At the other end of the spectrum, few Long Beach voters reported that they utilize the LBpost.com website (10%), *Orange County Register* (5%), and the *Long Beach Business Journal* (4%) on a weekly basis.
- The majority of Long Beach voters who read the *Los Angeles Times* (56%), *Long Beach Press Telegram* (70%), *Downtown and Grunion Gazettes* (83%), *Orange County Register* (60%), and *Long Beach Business Journal* (66%) primarily read in print.
- A plurality (44%) of Long Beach residents indicated that they most often use a home computer or laptop to access online information, followed by 36% who use a smart phone, and 10% who primarily use a tablet. Approximately 3% indicated that they weren't sure which method they use most often, whereas 7% stated that they do not have Internet access.

AWARENESS & PERCEPTIONS OF PORT

- Nearly all voters in 2015 (96%) indicated that they had heard of the Port of Long Beach prior to participating in the survey.
- When offered an open-ended opportunity to describe the Port in their own words, the vast majority of respondents used positive or neutral terms. In 2015, 17% referred to the Port as being good for the economy/a revenue source, 12% mentioned the Port's size, 12% described the Port as busy and full of activity, whereas 9% made a general positive comment about the Port.
- Among the negative descriptions offered, concerns about the environment and/or pollution related to Port activities were the most common (6%), followed by references to traffic congestion (5%) or the agency being poorly managed/operated (4%).
- Nearly half (49%) of those surveyed in 2015 indicated that they had no opinion regarding the Port. Among those with an opinion, perceptions of the Port were decidedly positive—with 42% holding a favorable opinion compared to 8% unfavorable.
- Concerns about Port jobs was the most common reason why some voters held an unfavorable opinion about the Port in 2015, being mentioned by 27% of those who had an unfavorable opinion of the agency. Other reasons mentioned included questions and concerns about labor and union issues (20%), environmental issues/pollution (19%), traffic congestion (17%), and perceptions of mismanagement/corruption (14%).
- Long Beach voters generally characterized the Port in a positive way. A clear majority of Long Beach voters agreed that the Port is beneficial to the local economy (87%), is an important creator of jobs (83%), makes a positive difference in the community (72%), is effective (66%), cares about the environment (52%), and is involved in the community (52%).
- Just under half of all respondents perceived that the Port is visionary (48%), trustworthy (46%), and fiscally responsible (45%), with most of the remaining respondents being undecided/unsure. Just 20% of respondents felt that the Port does *not* care about residents' concerns.

PORT COMMUNICATIONS

- Overall, 59% of respondents indicated that they were satisfied with the Port's efforts to communicate with residents through newsletters, television, the Internet, and other means, with 21% indicating that they were *very* satisfied. The remaining respondents were either dissatisfied with the Port's communication efforts (22%) or unsure of their opinion (18%).
- Overall, more than two-thirds of voters (70%) indicated that they recalled hearing, reading, or seeing any news stories, public service announcements, or advertisements relating to the Port of Long Beach in the past year.
- Television news (29%), the Internet in general (24%), direct mail (16%), and the *Long Beach Press-Telegram* (16%) were the most frequently mentioned sources for Port-related information in 2015. Other commonly mentioned sources included other newspapers/periodicals (10%), radio news (10%), the Port Newsletter (8%), the *Los Angeles Times* (8%), friends/family (7%), and the *Downtown* and *Grunion Gazettes* (5%).
- Respondents indicated that newsletters/direct mail to the home was the most effective method for the Port to communicate with them (80% very or somewhat effective), followed by advertisements in local papers (73%).
- Second-tier methods included social media like Twitter or Facebook (68%), electronic newsletters (67%), the Port's website (66%), and email (65%).

- Overall, about half of Long Beach residents indicated that YouTube videos (58%), Television Channel 8 (53%), and text messages (47%) were effective means for the Port to communicate with them, while less than one-third (32%) viewed automated telephone calls to be effective.

RE:PORT & WEBSITE

- Approximately 43% of those who participated in the survey in 2015 recalled receiving the *Re:Port* newsletter in the 12 months prior to the interview.
- Among all respondents, 20% indicated that they always read the newsletter when it arrives, 15% sometimes read it, 5% rarely read it, 2% receive the newsletter but never read it, and 57% indicated that they do not receive the newsletter.
- Nineteen percent (19%) of respondents indicated that they had visited the Port's website in the 12 months prior to the interview.
- Approximately one-third (32%) of respondents recalled seeing Port of Long Beach billboards during the 12 months prior to the interview.
- During the past year, 39% of Long Beach voters recalled encountering Port of Long Beach advertisements on local buses.

INFORMATION & ATTITUDES

- Virtually all Long Beach voters with an opinion agreed that *international trade is important to our local, state and national economies* (96%), that *the Port of Long Beach is a vital economic engine for Long Beach and the Southern California region, being responsible for the creation of jobs and economic prosperity* (95%), that in *order to stay competitive in the global economy and avoid losing business and jobs, the Port needs to make its facilities more productive and efficient* (95%), and that *modernizing Port facilities to accommodate increased cargo is OK provided that it does not harm the environment* (91%).
- At least three-quarters of Long Beach voters with an opinion also agreed that *To keep up with demand and remain competitive in the global economy, the Port should expand its facilities and cargo carrying capacity* (81%), *the Port of Long Beach is working hard to reduce the negative environmental impacts of shipping and cargo operations* (79%), and *The Port of Long Beach does a good job managing large-scale construction projects, completing them on-time and on-budget* (78%).
- When compared to the other statements tested, fewer Long Beach voters agreed that *The Port of Long Beach does not use tax payer money to fund its operations* (51%) and *Construction projects at the Port are causing a lot of traffic congestion in Long Beach* (57%).
- Less than half of Long Beach voters (45%) knew that trains are used to move cargo at the Port of Long Beach. The remaining respondents were either unsure (47%) or held the incorrect understanding that trains are not used to move cargo at the Port (8%).
- Approximately one-third (35%) of voters surveyed indicated that—prior to taking the survey—they were aware that the Port of Long Beach offers free tours of the harbor.
- Among all respondents, 12% indicated that they had taken a free harbor tour offered by the Port in the past.

FOLLOW-UP OPINION OF PORT

- After learning more about the Port through the course of the survey and also being reminded of aspects of the Port's programs, projects, and outreach efforts that may not have been top of mind at the beginning of the interview, more than half (58%) of voters held a favorable opinion of the Port at this point in the survey, which is an increase of 16 percentage points from the *natural* levels recorded.

Conclusions

As noted in the *Introduction*, this study was designed to gather information that will aid the Port's Communications and Community Relations Division in its efforts to strengthen Port-resident communication and community engagement. Whereas subsequent sections of this report are devoted to conveying the detailed results of the survey, in this section we attempt to 'see the forest through the trees' and note how the collective results of the survey answer some of the key questions that motivated the research.

Are residents aware of the Port of Long Beach, and what are their impressions of the agency?

Special districts and sub-agencies often operate in relative obscurity from the public's perspective. Although virtually all residents can identify their city and—to a lesser extent—their local school district, special districts or municipal sub-agencies are often not on the average resident's radar. Considering the above, the level of public awareness of the Port of Long Beach among voters remains phenomenally high. Virtually all respondents (96%) had heard of the Port of Long Beach prior to participating in the 2013 survey. Moreover, the levels of awareness of the Port have remained consistently high since the baseline study in 2007.

As in prior years, however, awareness of the Port does not necessarily translate into having an opinion of the agency. Despite nearly all voters having *heard* of the Port and many being capable of describing the Port in a way that indicated they had a basic understanding of what the Port is/does, nearly half (49%) of voters in 2015 did not have an opinion of the Port—good or bad. Moreover, the percentage of voters who do not know enough about the Port to have an opinion of the Authority grew significantly (+9%) over the past two years. That nearly half of Long Beach voters do not have an opinion of the Port is concerning to the degree that their opinions of the Port could be easily shaped in the future by negative articles or attack advertisements. Having a foundation of facts about the Port and its role in the local economy would allow a voter to better assess the value and meaning of Port-related articles.

The above notwithstanding, it is also the case that—among those with an opinion—perceptions of the Port were decidedly positive with 42% holding a favorable opinion compared to 8% unfavorable. It should also be noted that the tendency of respondents to recall positive or neutral aspects of the Port was in stark contrast to the far fewer negative comments or attitudes recorded during the study. Along these lines, pollution and environmental concerns—once commonly mentioned when voters were asked to describe the Port—are no longer in the top five responses when voters characterize the Port of Long Beach in their own words.

How have public perceptions of the Port changed over time?

Yes. Although the process has been incremental and changes in any one year tend to be small, over the years the Port's communication efforts have succeeded in steadily improving voters' perceptions and characterizations of the Port of Long Beach on many key dimensions—especially with respect to environmental issues and the Port's consideration of residents' interests. For example, the percentage who perceive that the Port cares about the environment has increased from 46% in 2007 to 52% in 2015, with most of the remaining respondents being unsure. Associations between the Port of Long Beach and environmental issues/pollution in voters' minds are also far fewer in recent years when compared to 2007, 2008 and 2009.

During the past two years, however, opinions of the Port have also declined in certain areas. The percentages who view the Port as visionary and involved in the community declined 6% and 7%, respectively, between 2013 and 2015. Fewer Long Beach voters also recognized in 2015 that the Port does *not* use tax payer money to fund its operations (-9%). Although not a cause for alarm, it does reinforce the importance of maintaining consistent, clear, and effective communications with Long Beach voters.

How satisfied are residents with the Port's efforts to communicate with them?

Between 2007 and 2013, residents had expressed a growing level of satisfaction with the Port's efforts to communicate with them through newsletters, television, the Internet, and other means. In 2007, 57% of respondents indicated that they were satisfied with the Port's communication efforts in this respect. The corresponding figure in 2013 was 67%. Its worth noting, moreover, that nearly all of this growth occurred in the *very* satisfied category.

In 2015, however, satisfaction with the Port's overall communication efforts declined significantly (-8%) with 59% of voters indicating they were satisfied in this respect. This pattern of decreasing satisfaction undoubtedly reflects the decline in recalled exposure to Port-sponsored communications during this same period. Fewer voters recalled hearing, reading or seeing news stories, public service announcements, or advertisements related to the Port of Long Beach in 2015 (-6%), and the percentage who specifically recalled receiving the *Re:Port* newsletter declined from 58% in 2013 to 43% in 2015.

The Port of Long Beach is not alone in this area, as a number of other public agencies have displayed similar trends in satisfaction with resident communication. One likely underlying cause is that the public's preferences for communication are growing increasingly diverse. Whereas older residents continue to rely heavily on newsletters and printed forms of communication, younger residents generally show great interest in digital forms of communication including Social Media, text, and smart phone apps. This pattern makes the challenge of communicating with residents more difficult than in the past, when the sources residents relied on for information were fewer and more consistent across subgroups. Based on these trends, the Port—like other agencies—may want to conduct a careful review of its current communications strategies and budget to ensure that both are evolving to meet this growing challenge.

Are Long Beach residents' communication habits changing?

Yes. Over the past eight years there has been a consistent pattern of change in the sources Long Beach residents rely on for information about news and events in the City. The market share captured by newspapers has declined steadily over the past eight years, from 52% in 2007 to just 24% in 2015. Television has remained relatively stable during this period, representing one-quarter (25%) of the primary market in 2015. Reliance on the Internet, meanwhile, has nearly tripled during the past eight years—with 46% of respondents in 2015 indicating that it is their *primary* information source.

Consistent with the aforementioned patterns, the 2015 survey also recorded significant changes in the *frequency* with which Long Beach residents utilize certain information sources. The proportion of residents who utilize the *Long Beach Press Telegram*, *Downtown and Grunion Gazettes*, and radio news on a weekly basis declined significantly since 2013. Naturally, these changes are in part a reflection of the demographic changes in the city as younger residents who lean toward technology-based communications slowly replace older residents who tend to shy away from these sources.

It is important to note the trend toward online information sources. It is equally important, however, to recognize that—for the vast majority of Long Beach residents—print media is *still* the most effective means for the Port to communicate with them. Indeed, among a long list of options, residents indicated that newsletters directly mailed to the home and advertisements in local papers remain the two most effective ways for the Port to communicate with them.

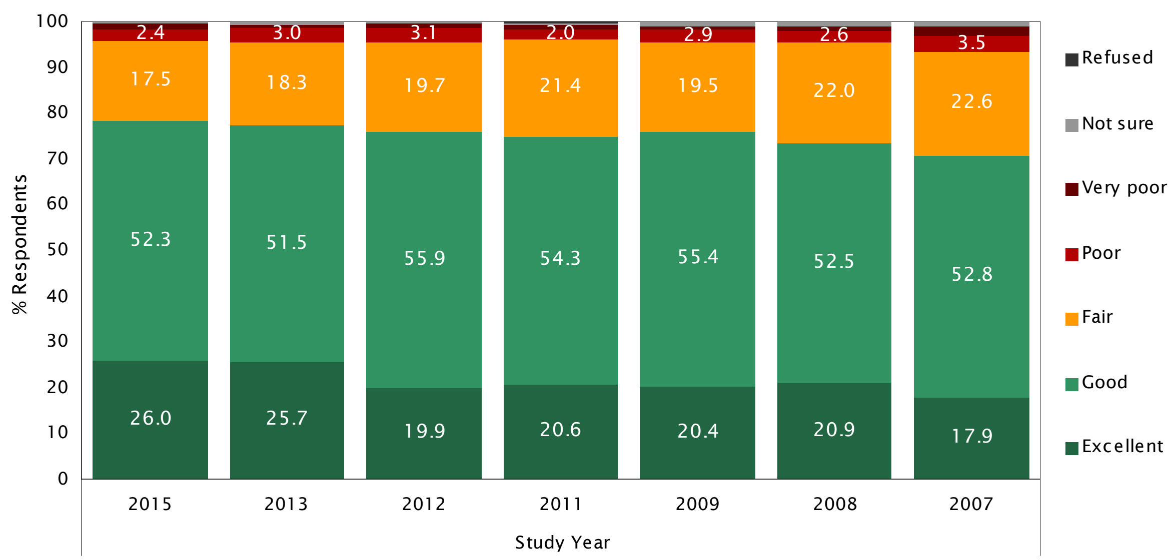
Quality of Life & Local Issues

The opening series of questions in the survey was designed to assess residents' top-of-mind perceptions about the quality of life in Long Beach, what local government could do to improve the quality of life in the city, as well as the most important local issues facing residents at this time.

OVERALL QUALITY OF LIFE At the outset of the interview, respondents were asked to rate the quality of life in Long Beach using a five-point scale of excellent, good, fair, poor, or very poor. As shown in Figure 2 below, most respondents shared very favorable opinions of the quality of life in Long Beach in 2015, with 26% reporting it is 'excellent' and 52% stating it is 'good'. An additional 18% rated the overall quality of life as 'fair', whereas just 4% of residents used 'poor' or 'very poor' to describe the quality of life in Long Beach. The results are virtually identical to those recorded in the 2013 study.

Question 2 *How would you rate the overall quality of life in the City? Would you say it is excellent, good, fair, poor or very poor?*

Figure 2 Quality of Life by Study Year



For the interested reader, figures 3 through 6 on the following pages show how perceptions of the quality of life in the city varied across subgroups of Long Beach voters. Although a majority of voters in every category rated the quality of life in Long Beach as excellent or good, those with a favorable opinion of the Port, those who consider themselves strong environmentalists, Latinos, seniors, and voters who reside in the Third and Fifth Council Districts were the most likely to indicate that the quality of life in Long Beach is excellent.

Figure 3 Quality of Life by Years in Long Beach, Encountered Port Info in Past Year & Opinion of Port of Long Beach

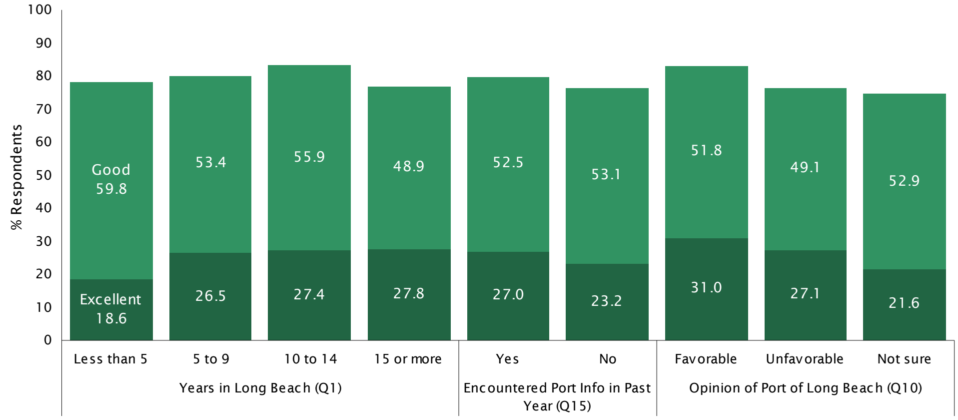


Figure 4 Quality of Life by Environmentalist, Employment Status & Gender

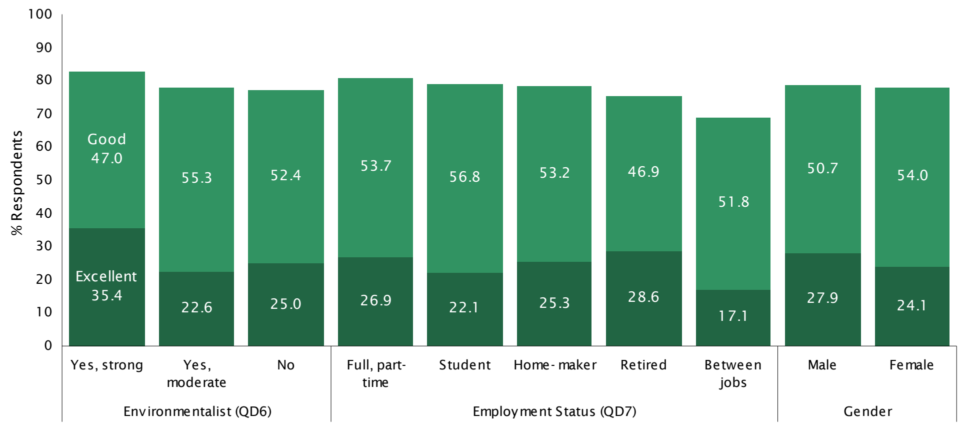


Figure 5 Quality of Life by Ethnicity & Age

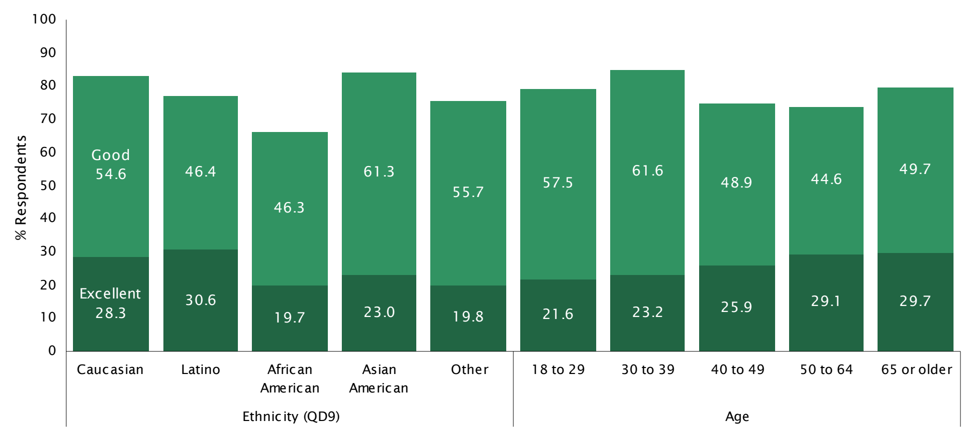
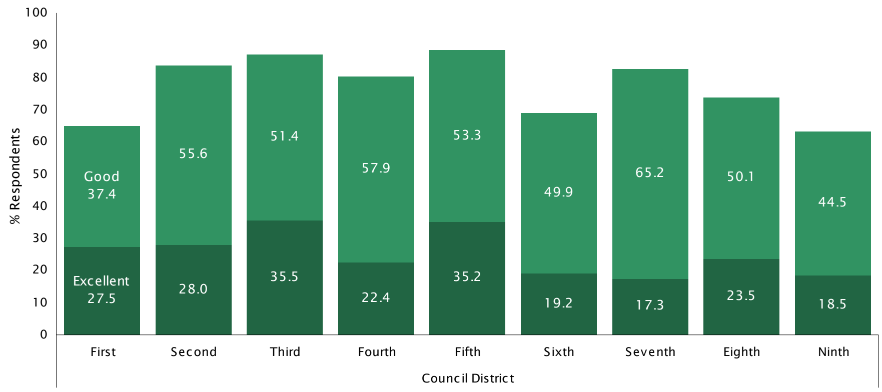


FIGURE 6 QUALITY OF LIFE BY COUNCIL DISTRICT

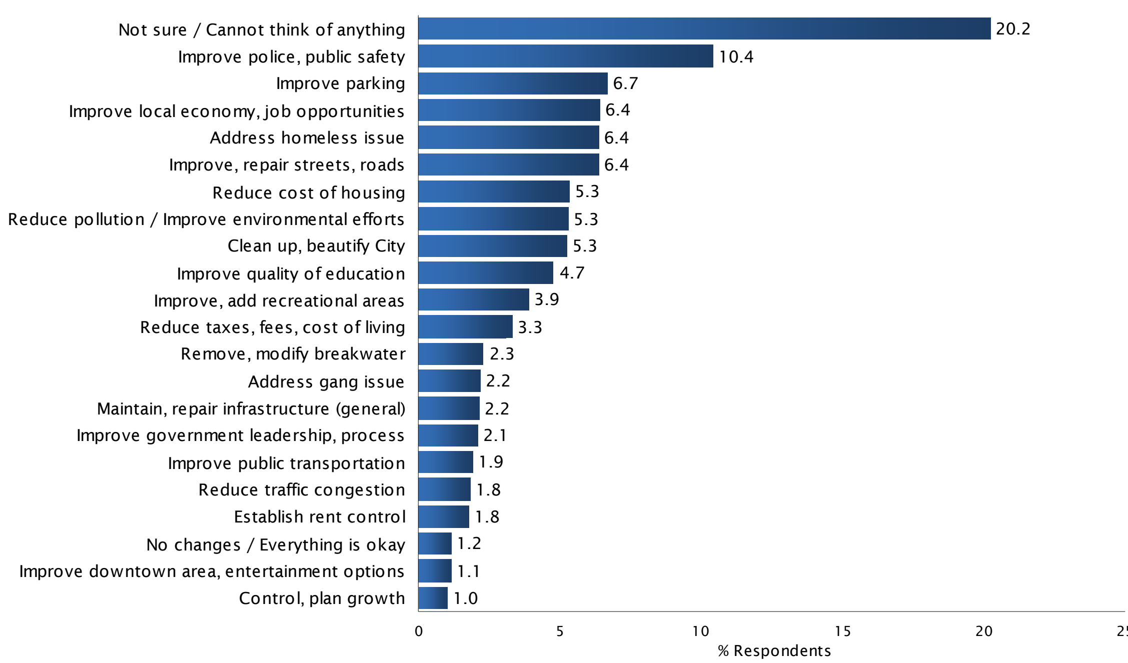


WAYS TO IMPROVE QUALITY OF LIFE Respondents were asked to indicate one thing that government could change to make Long Beach a better place to live, now and in the future. Question 3 was posed in an open-ended manner, allowing respondents to mention any change that came to mind without being prompted by or restricted to a list of options. True North later reviewed the verbatim responses and grouped them into the categories shown in Figure 7.

Just over one-fifth of respondents said they could not think of anything to change (20%) or that no changes were needed (1%). Among specific changes mentioned, the most common were improving police/public safety (10%), improving parking (7%), improving the local economy and job opportunities (6%), addressing the homeless issue (6%), and improving/repairing streets and roads (6%).

Question 3 *If the government could change one thing to make Long Beach a better place to live now and in the future, what change would you like to see?*

FIGURE 7 CHANGES TO IMPROVE LONG BEACH



For comparison, the top five responses to this question are presented below in Table 1 by study year and in Table 2 by Council District for 2015. Over the past eight years, public safety and street maintenance have been consistent themes.

Table 1 Top Changes to Improve Long Beach by Study Year

Study Year						
2015	2013	2012	2011	2009	2008	2007
Not sure / Cannot think of anything	Not sure / Cannot think of anything	Not sure / Cannot think of anything	Not sure / Cannot think of anything	Not sure / Cannot think of anything	Improve police, public safety	Improve police, public safety
Improve police, public safety	Improve police, public safety	Improve, repair streets, roads	Improve quality of education	Improve police, public safety	Clean up, beautify City	Not sure / Cannot think of anything
Improve parking	Improve, repair streets, roads	Improve police, public safety	Improve police, public safety	Improve, repair streets, roads	Not sure / Cannot think of anything	Reduce cost of housing
Improve local economy, job opportunities	Improve quality of education	Improve local economy, job opportunities	Improve, repair streets, roads	Reduce pollution / Improve environment	Reduce cost of housing	Reduce pollution / Improve environment
Address homeless issue	Clean up, beautify City	Improve quality of education	Clean up, beautify City	Clean up, beautify City	Improve, repair streets, roads	Improve, repair streets, roads

Table 2 Top Changes to Improve Long Beach by Council District

Council District								
First	Second	Third	Fourth	Fifth	Sixth	Seventh	Eighth	Ninth
Not sure / Cannot think of anything	Improve parking	Not sure / Cannot think of anything	Not sure / Cannot think of anything	Not sure / Cannot think of anything	Not sure / Cannot think of anything	Not sure / Cannot think of anything	Improve police, public safety	Not sure / Cannot think of anything
Improve parking	Improve parking	Reduce pollution / Improve enviro efforts	Improve, repair streets, roads	Improve police, public safety	Address homeless issue	Improve police, public safety	Not sure / Cannot think of anything	Improve, repair streets, roads
Reduce cost of housing	Address homeless issue	Improve police, public safety	Improve police, public safety	Improve quality of education	Improve police, public safety	Reduce cost of housing	Improve local economy, job opportunities	Improve police, public safety
Improve police, public safety	Improve police, public safety	Improve, repair streets, roads	Improve local economy, job opportunities	Address homeless issue	Improve, repair streets, roads	Address gang issue	Reduce cost of housing	Improve local economy, job opportunities
Address homeless issue	Improve local economy, job opportunities	Improve quality of education	Improve parking	Improve, add recreational areas	Improve local economy, job opportunities	Clean up, beautify City	Improve, repair streets, roads	Clean up, beautify City

IMPORTANCE OF LOCAL ISSUES The final question in this series presented respondents with a list of seven specific issues facing residents of Long Beach and asked them to rate the importance of each issue. Because the same response scale was used for each issue, the results provide insight into how important each issue is on a scale of importance *as well as* how each issue ranks in importance relative to the other issues tested. To avoid a systematic position bias, the order in which the issues were read to each respondent was randomized.

Figure 8 on the next page presents each issue tested, as well as the importance assigned to each issue by survey participants, ranked by order of importance.[2] Overall, protecting and improving the local economy received the highest percentage of respondents who said the issue was at least very important (88%), followed by improving education (87%), creating good paying, local jobs (86%), protecting the environment (85%), improving public safety (84%), making sure our shipping ports are safe and secure (84%), and reducing traffic congestion (57%).

2. Issues are ranked by the percentage of respondents who indicated the issue was either extremely important or very important.

Question 4 *Next, I'm going to read a list of issues facing Long Beach and for each one, please tell me how important you feel the issue is to you, using a scale of extremely important, very important, somewhat important or not at all important.*

Figure 8 Importance of Local Issues

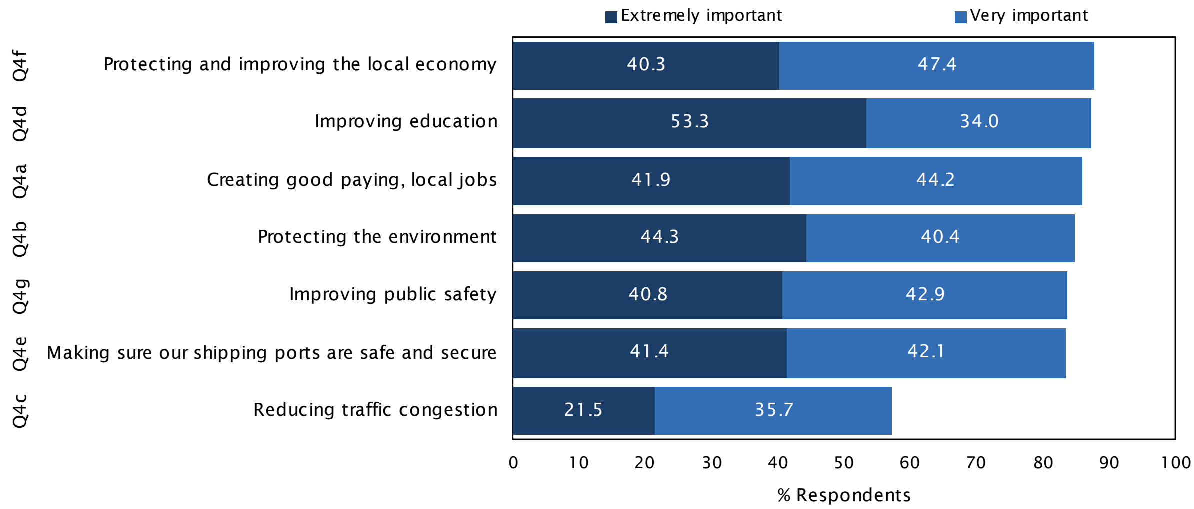


Table 3 shows how the percentage who rated each issue as at least very important has varied over the past eight years, as well as the difference between the 2015 and 2013 survey results (far right column). Compared with the previous study, there were two small but statistically significant increases in the importance assigned to two issues: reducing traffic congestion (+5%) and protecting the environment (+4%).

Table 3 Importance of Local Issues by Study Year

	Study Year							Change in Extremely + Very
	2015	2013	2012	2011	2009	2008	2007	2013 to 2015
Reducing traffic congestion	57.3	52.5	54.8	52.8	55.9	63.0	63.1	+4.7†
Protecting the environment	84.8	80.6	77.9	77.9	78.5	82.6	84.1	+4.2†
Making sure our shipping ports are safe, secure	83.5	80.1	80.5	83.7	85.0	84.8	85.5	+3.4
Improving public safety	83.6	81.4	79.1	N/A	N/A	N/A	N/A	+2.2
Improving education	87.3	87.4	88.4	88.3	86.0	84.7	85.0	-0.1
Creating good paying, local jobs	86.0	86.1	89.0	89.2	87.3	82.4	80.1	-0.1
Protecting and improving the local economy	87.8	88.5	89.5	89.4	90.7	85.9	82.0	-0.7

† Statistically significant change ($p < 0.05$) between the 2013 and 2015 studies.

General Information Sources

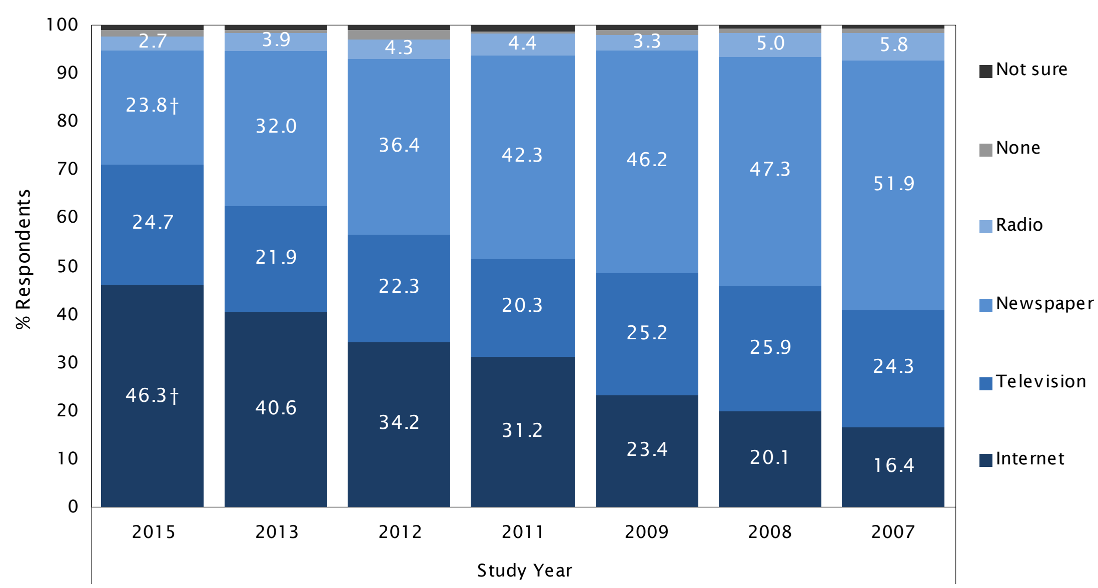
Having measured the perceived quality of life in the city and the saliency of local issues, the survey next focused on the information sources that residents use to learn about news and events in the City of Long Beach.

PRIMARY INFORMATION SOURCE The first question in this series asked residents to identify which medium—newspapers, television, radio, or the Internet—is their *primary* source for information about news and events in the City of Long Beach. As shown in Figure 9 below, 46% of Long Beach residents indicated in 2015 that they rely on the Internet for most of their information about the City, whereas one-quarter (25%) primarily rely on television, and 24% primarily rely on a newspaper. Less than 3% of respondents cited radio as their primary source for information about news and events in Long Beach.

Figure 9 also shows a clear trend over the past eight years in the sources that Long Beach residents turn to for information about news and events in the City. Newspapers have steadily declined during this period, from being the dominant source in 2007 with 52% market share to just 24% in 2015 (a statistically significant trend). Meanwhile, the percentage of residents who primarily rely on the Internet has nearly tripled from 16% in 2007 to 46% in 2015.

Question 5 *Which of the following would you say is your primary source for information about news and events in the City of Long Beach? Newspapers, television, radio, or the Internet?*

FIGURE 9 PRIMARY CITY OF LONG BEACH INFORMATION SOURCE BY STUDY YEAR



† Statistically significant change ($p < 0.05$) between the 2013 and 2015 studies.

Figures 10 through 13 show how the reliance on particular information sources in 2015 varied across subgroups of Long Beach voters. When compared to their respective counterparts, long-time residents (15+ years), retired individuals, those with graduate school education, Caucasians, high-income households, seniors, and residents of the Third and Fifth Council Districts were the most reliant on newspapers. Those who have lived in the City for less than five years, students, college graduates, Latinos, Asians, high-income households, voters under 40 years of age, and those in the Sixth Council District were comparatively more reliant on the Internet. Reliance on television, meanwhile, was most common among retirees and those in-between jobs, those with a high school education or less, African Americans, those from households that earn less than $25,000 annually, and seniors.

FIGURE 10 PRIMARY CITY OF LONG BEACH INFORMATION SOURCE BY YEARS IN LONG BEACH & EMPLOYMENT STATUS

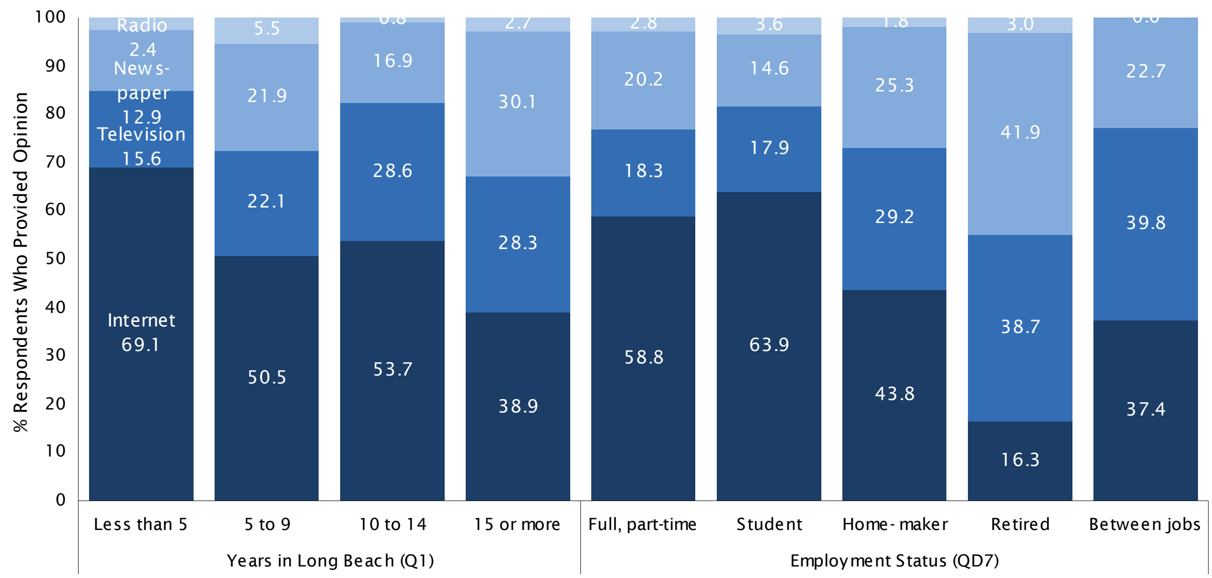


FIGURE 11 PRIMARY CITY OF LONG BEACH INFORMATION SOURCE BY EDUCATION LEVEL & ETHNICITY

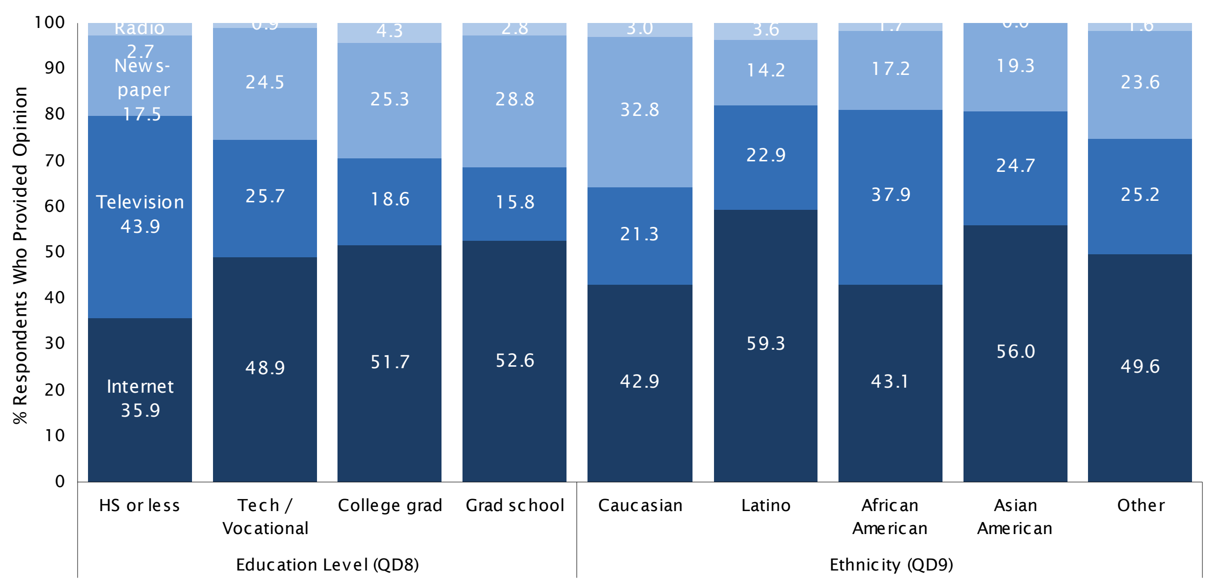


Figure 12 Primary City of Long Beach Information Source by Household Income & Age

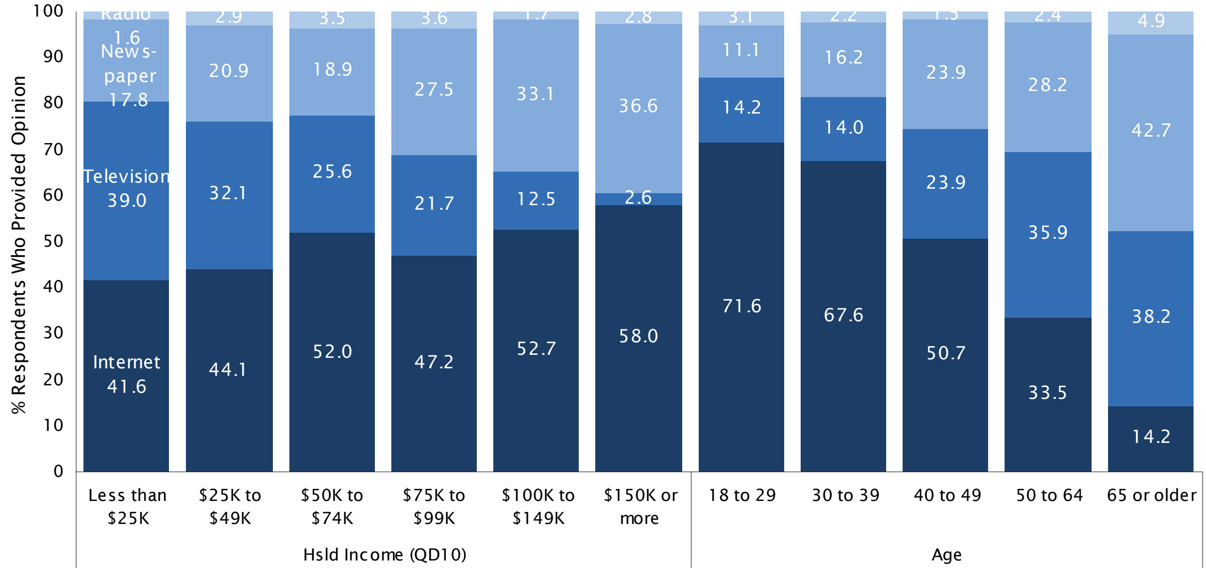
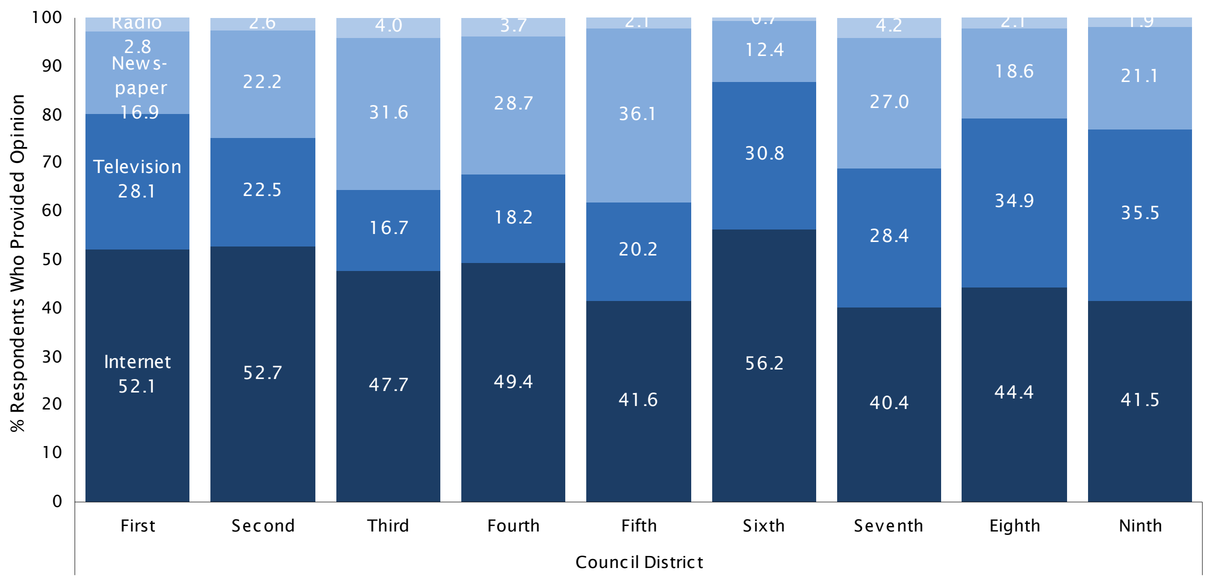


Figure 13 Primary City of Long Beach Information Source by Council District



FREQUENCY OF USING SPECIFIC SOURCES Having identified each respondent's *primary* information source for Long Beach news and events, the survey proceeded to profile the frequency with which respondents utilized the list of 11 information sources shown on the left of Figure 14. For each information source, respondents were asked to indicate whether they use the source every week, two to three times per month, once per month, less often than once per month, or never. The sources are sorted from high to low in Figure 14 based on the percentage of respondents who utilize the source at least occasionally.

Overall, the most frequently utilized source of information in 2015 is television news, with 65% of Long Beach voters indicating that they utilize this source on a weekly basis. Other frequently used sources are Google or Yahoo! (64%), Facebook (45%), radio news (44%), YouTube (34%), the *Long Beach Press Telegram* (32%), *Los Angeles Times* (26%), and the *Downtown* and *Grunion Gazettes* (17%). At the other end of the spectrum, few Long Beach voters reported that they utilize the LBpost.com website (10%), *Orange County Register* (5%), and the *Long Beach Business Journal* (4%) on a weekly basis. When compared to 2013, there were statistically significant declines in weekly utilization of the *Long Beach Press Telegram*, *Downtown* and *Grunion Gazettes,* and radio news (see Table 4).

Question 6 *As I read the following list of information sources, I'd like to know how often you use each source. For each that I read, please indicate whether you use it every week, 2 to 3 times per month, once per month, or less often than once per month. If you never use this information source, just say so.*

FIGURE 14 FREQUENCY OF USING INFORMATION SOURCES

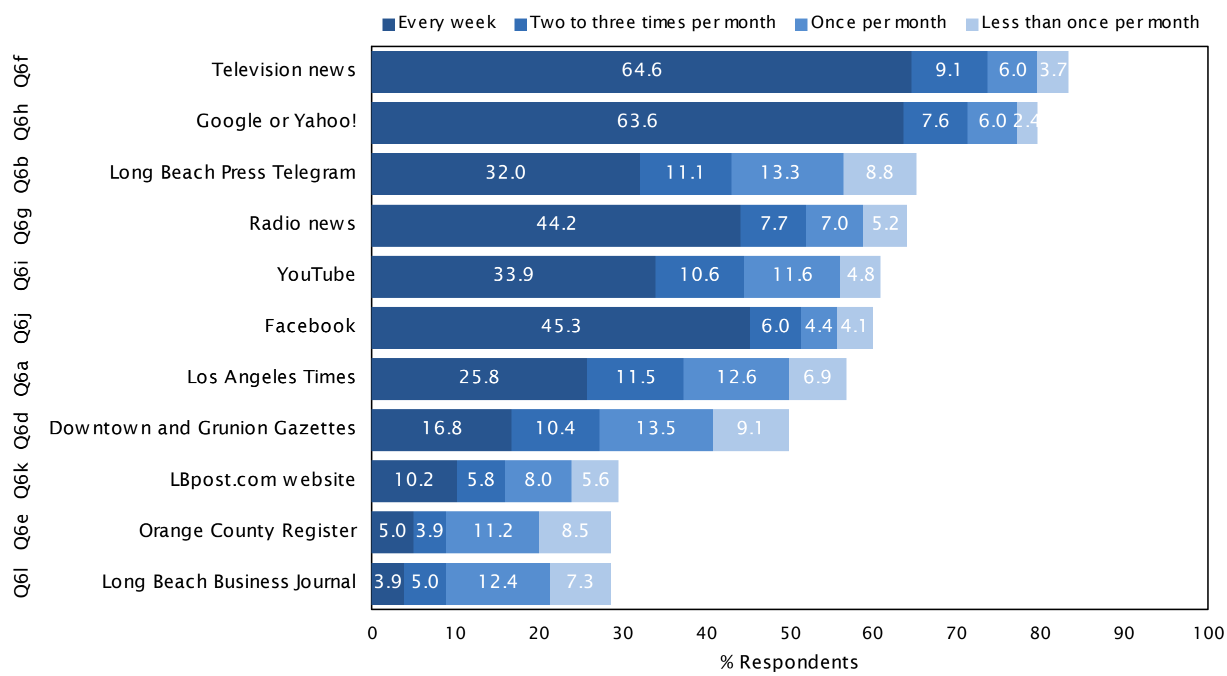


TABLE 4 FREQUENCY OF USING INFORMATION SOURCES BY STUDY YEAR

	At Least Once Per Week Study Year							At Least Once Per Month Study Year						
	2015	2013	2012	2011	2009	2008	2007	2015	2013	2012	2011	2009	2008	2007
Television news	64.6	66.1	69.3	77.3	78.9	71.9	71.7	79.7	82.3	84.8	88.0	90.4	86.8	85.8
Google or Yahoo!	63.6	63.4	62.1	63.5	58.6	N/A	N/A	77.2	76.7	74.7	76.0	71.6	N/A	N/A
Long Beach Press Telegram	32.0†	39.1	44.9	52.0	49.9	49.5	55.0	56.4†	65.1	68.8	73.7	74.8	68.6	77.0
Radio news	44.2†	51.0	53.1	50.1	61.3	50.4	50.9	58.9†	67.2	68.6	66.8	75.0	65.0	67.3
YouTube	33.9	30.0	27.3	24.1	18.2	N/A	N/A	56.1	53.0	47.7	46.8	40.2	N/A	N/A
Facebook	45.3	44.6	38.7	36.9	18.1	N/A	N/A	55.7	55.3	50.9	48.4	27.8	N/A	N/A
Los Angeles Times	25.8	29.4	30.8	34.0	32.8	35.8	34.0	49.8	51.6	54.3	54.1	54.8	56.2	56.2
Downtown and Grunion Gazettes	16.8†	21.4	22.1	23.1	23.9	22.9	25.8	40.7†	48.4	47.5	50.4	49.0	50.6	54.9
LBpost.com website	10.2	9.4	12.1	10.3	N/A	N/A	N/A	24.0	23.1	24.3	24.0	N/A	N/A	N/A
Orange County Register	5.0	6.8	5.8	6.6	5.6	6.5	7.6	20.1	21.1	18.8	18.8	16.2	19.7	20.3
Long Beach Business Journal	3.9	5.5	5.7	N/A	N/A	N/A	N/A	21.3	21.6	21.8	N/A	N/A	N/A	N/A

† Statistically significant change ($p < 0.05$) between the 2013 and 2015 studies.

For the interested reader, Table 5 highlights the top five most frequently used information sources by age group.

TABLE 5 FREQUENCY OF USING INFORMATION SOURCES AT LEAST ONCE PER WEEK BY AGE

	Age				
	18 to 29	30 to 39	40 to 49	50 to 64	65 or older
Television news	49.1	55.1	64.7	73.2	81.0
Google or Yahoo!	82.6	77.5	69.1	56.8	31.0
Long Beach Press Telegram	20.4	22.5	28.8	36.6	50.7
Radio news	35.3	44.9	42.4	52.1	44.7
YouTube	59.3	46.4	`	19.7	9.3
Facebook	59.3	62.3	51.8	35.7	18.3
Los Angeles Times	21.6	22.5	28.1	26.3	32.0
Downtown and Grunion Gazettes	7.8	9.4	20.1	21.6	24.7
LBpost.com website	12.6	15.9	7.2	8.5	6.7
Orange County Register	2.4	2.9	4.3	7.0	7.7
Long Beach Business Journal	1.2	2.2	2.9	5.6	7.3
Long Beach Register	0.0	0.0	0.0	0.0	0.0

DO YOU READ PRINT OR ONLINE? The next question in this series asked individuals who reported that they use the newspapers tested in Question 6 as to whether they primarily read the papers in print form or online. As shown in Figure 15, the majority of Long Beach voters who read the *Los Angeles Times* (56%), *Long Beach Press Telegram* (70%), *Downtown and Grunion Gazettes* (83%), *Orange County Register* (60%), and *Long Beach Business Journal* (66%) primarily read in print. However, there was a statistically significant decrease for the *Los Angeles Times* in the percentage who primarily read in print when compared to 2013 (see Table 6 on the next page).

Question 7 *Do you primarily read the: _____ in print or online?*

FIGURE 15 SOURCES FOR LOCAL NEWSPAPERS

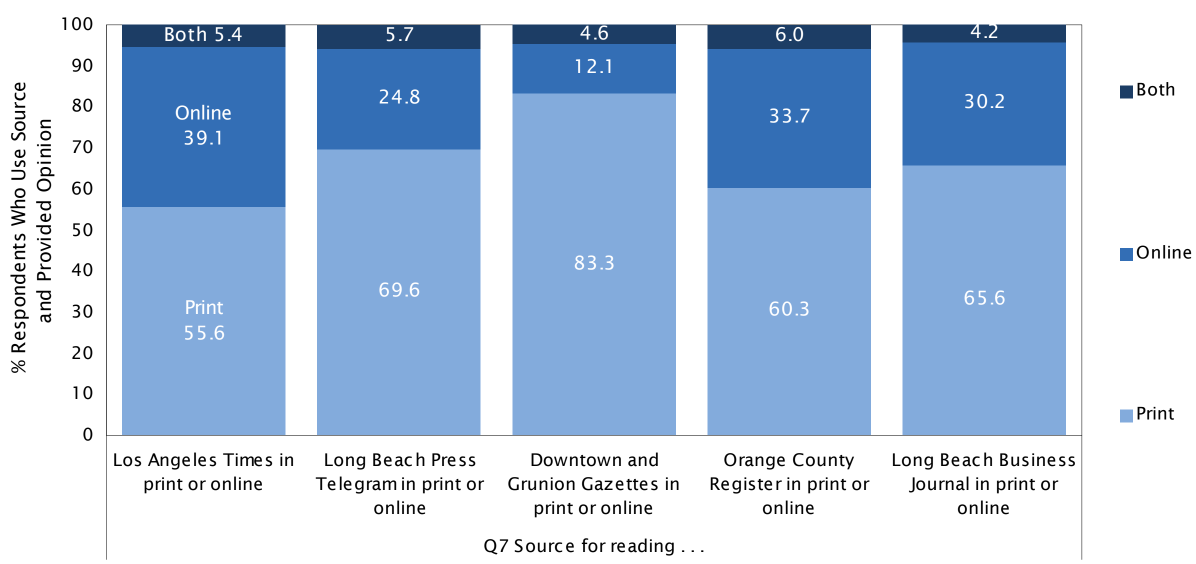


TABLE 6 SOURCES FOR LOCAL NEWSPAPERS BY STUDY YEAR

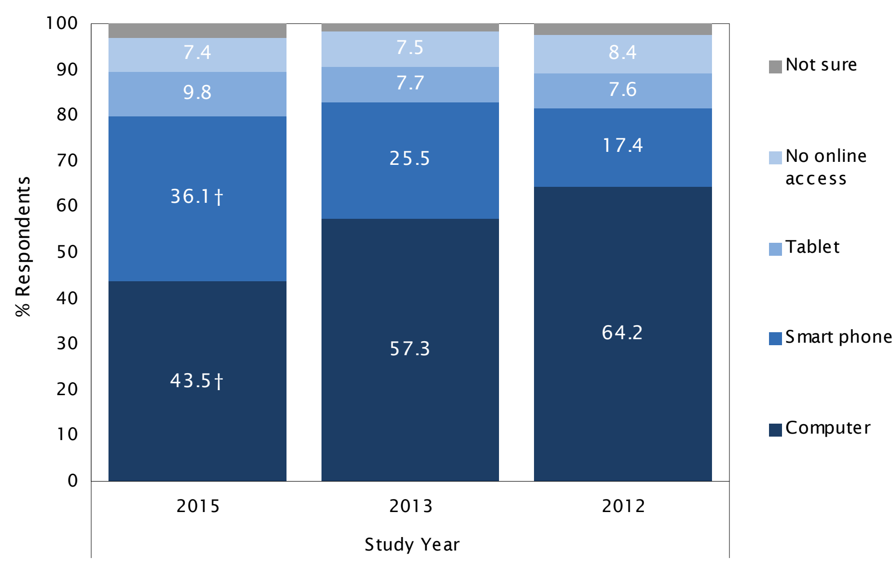
	Study Year				Change in Print as Primary Media
	2015	2013	2012	2011	2013 to 2015
Downtown and Grunion Gazettes in print or online	83.3	87.8	92.0	86.7	-4.5
Long Beach Press Telegram in print or online	69.6	74.1	74.3	78.4	-4.6
Long Beach Business Journal in print or online	65.6	74.3	71.6	N/A	-8.7
Orange County Register in print or online	60.3	71.0	65.8	61.1	-10.7
Los Angeles Times in print or online	55.6	69.9	63.7	71.3	-14.3†
Long Beach Register	0.0	71.8	71.6	N/A	N/A

† Statistically significant change ($p < 0.05$) between the 2013 and 2015 studies.

METHOD OF ACCESSING ONLINE INFORMATION The final question in this series asked respondents which they use most often when accessing information online—a home computer or laptop, smart phone, or a tablet? Figure 16 shows that a plurality (44%) of Long Beach residents indicated that they most often use a home computer or laptop to access online information, followed by 36% who use a smart phone, and 10% who primarily use a tablet. Approximately 3% indicated that they weren't sure which method they use most often, whereas 7% stated that they do not have Internet access. In the past two years, the percentage of Long Beach voters who stated they primarily use a home computer or laptop to access the Internet declined significantly, whereas the percentage that primarily use a smart phone increased significantly.

Question 8 *Which do you use most often to access information online - a computer, a smart phone, or a tablet?*

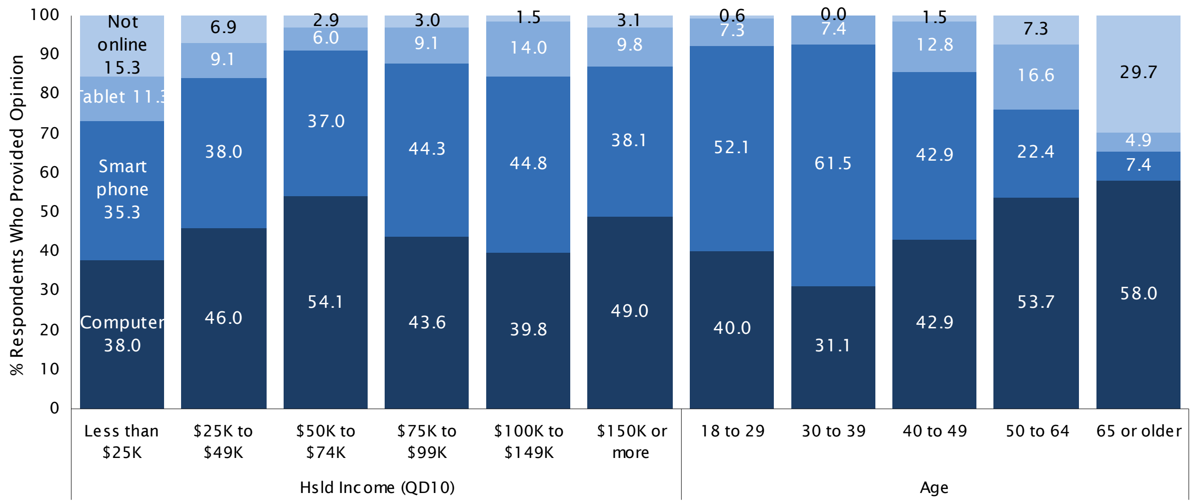
FIGURE 16 MOST COMMON METHOD OF ONLINE ACCESS



† Statistically significant change ($p < 0.05$) between the 2013 and 2015 studies.

Figure 17 on the next page shows how the primary method for accessing online information varied by household income and respondent age. The most striking pattern in the figure is the relationship between age and smart phone use, as voters under the age of 40 were much more likely to rely on their smart phone for Internet access when compared to voters 50 or older.

FIGURE 17 MOST COMMON METHOD OF ONLINE ACCESS BY HOUSEHOLD INCOME & AGE



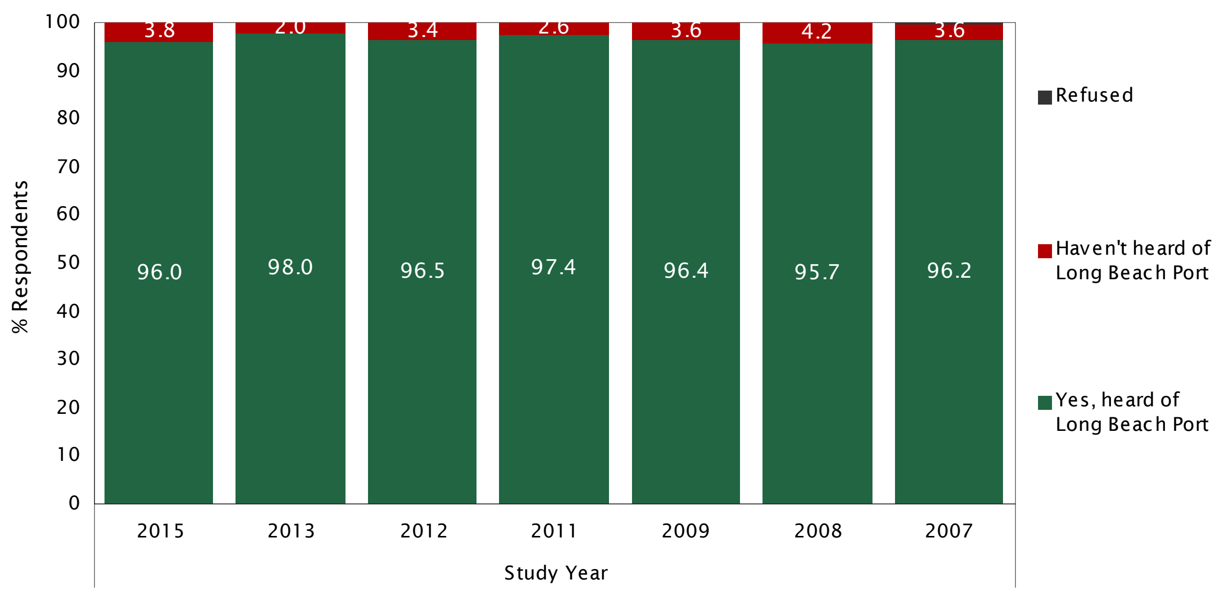
Awareness & Perceptions of Port

One of the principal goals of this study was to gauge public awareness and perceptions of the Port of Long Beach. Put simply, have residents heard of the Port of Long Beach, and what are their impressions of the Port? Accurately measuring awareness is a sensitive exercise, so the awareness questions were strategically placed in the interview so as to preclude potential measurement error associated with a position bias. In other words, because many of the questions in the survey addressed topics that could either aid a respondent's recall and/or allow them to guess at describing the Port, the awareness questions were purposely located early in the survey so as to avoid this potential source of bias.

AWARENESS OF PORT The first two questions in this series were designed to measure name recognition for the Port and—among those who recognized the name—identify how they would describe or characterize the Port. Overall, nearly all voters in 2015 (96%) indicated that they had heard of the Port of Long Beach prior to participating in the survey (Figure 18), which is nearly identical to the percentage found over the past eight years.

Question 9 *Prior to taking this survey, had you ever heard of the Port of Long Beach?*

FIGURE 18 AWARENESS OF PORT OF LONG BEACH BY STUDY YEAR



When offered an open-ended opportunity to describe the Port in their own words, the vast majority of respondents used positive or neutral terms. In 2015, 17% referred to the Port as being good for the economy/a revenue source, 12% mentioned the Port's size, 12% described the Port as busy and full of activity, whereas 9% made a general positive comment about the Port. Among the negative descriptions offered, concerns about the environment and/or pollution related to Port activities were the most common (6%), followed by references to traffic congestion (5%) or the agency being poorly managed/operated (4%). Table 7 shows the top five responses to this question and how they have varied over the past eight years. Its important to note that between 2007 and 2009 negative references to pollution were among the top five responses to this question, but in more recent years they are no longer in the top five.

Question 10 *Briefly and in your own words, how would you describe the Port of Long Beach?*

Figure 19 Descriptors of Port of Long Beach

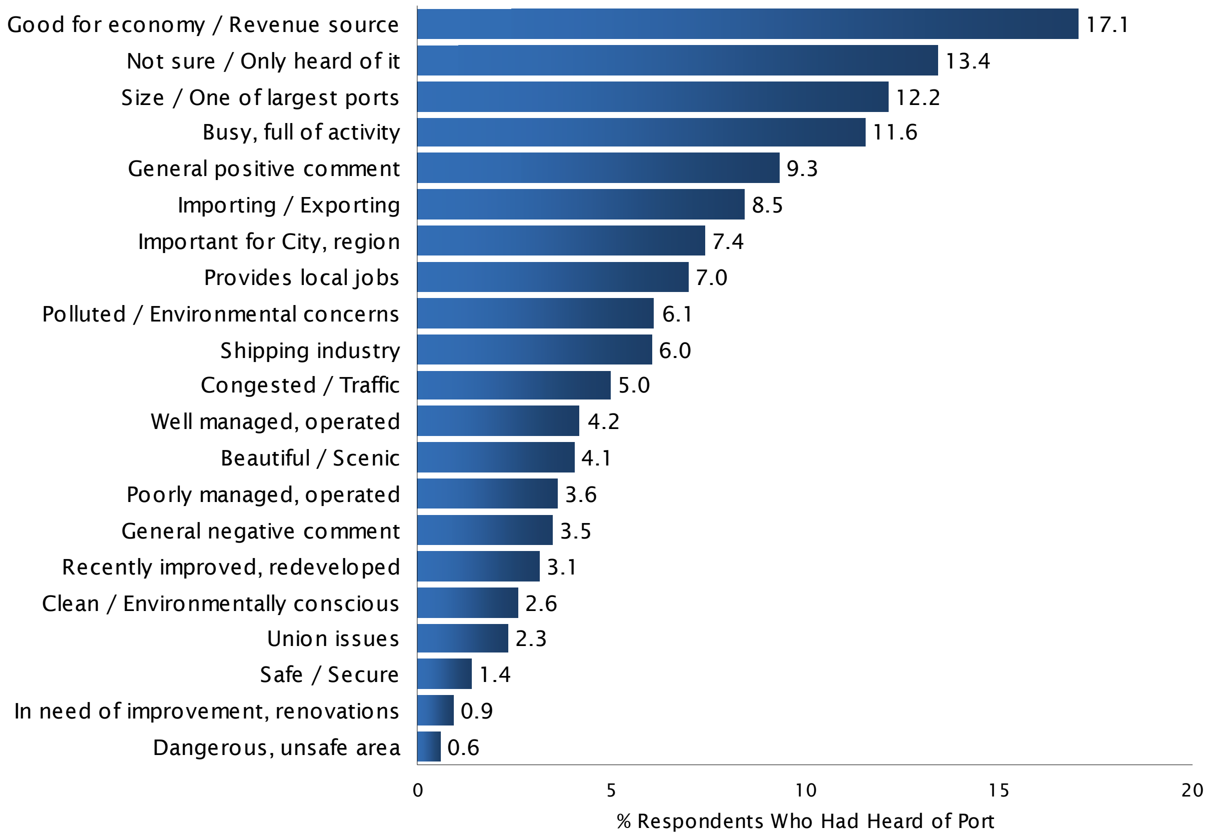


Table 7 Descriptors of Port of Long Beach by Study Year

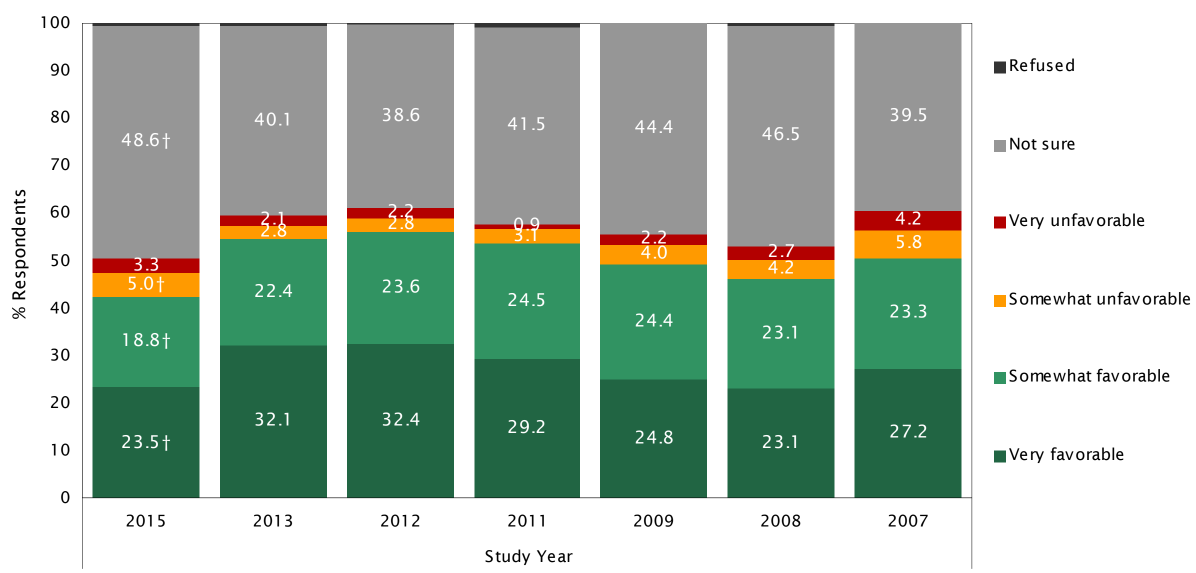
			Study Year			
2015	2013	2012	2011	2009	2008	2007
Good for economy / Revenue source	Good for economy / Revenue source	Good for economy / Revenue source	Good for economy / Revenue source	Importing / Exporting	Good for economy / Revenue source	Importing / Exporting
Not sure / Only heard of it	Size / One of largest ports	Size / One of largest ports	Size / One of largest ports	Good for economy / Revenue source	Importing / Exporting	Good for economy / Revenue source
Size / One of largest ports	General positive comment	General positive comment	General positive comment	General positive comment	General positive comment	General positive comment
Busy, full of activity	Importing / Exporting	Importing / Exporting	Importing / Exporting	Polluted / Environmental concerns	Busy, full of activity	Busy, full of activity
General positive comment	Busy, full of activity	Busy, full of activity	Shipping industry	Busy, full of activity	Polluted / Environmental concerns	Polluted / Environmental concerns

FAVORABILITY After clarifying that the Port of Long Beach is a public agency responsible for managing the shipping terminals, commerce and navigation in the City's Harbor District, the survey next asked respondents whether they held a favorable or unfavorable opinion of the Port—or if they had no opinion either way. Figure 20 presents the results to this question for 2015 alongside the results from surveys dating back to 2007.

The figure shows that 49% of those administered Question 11 in 2015 indicated that they were not sure or held no opinion regarding the Port—a percentage that increased significantly during the past two years. Among those with an opinion, perceptions of the Port were decidedly positive—with 42% holding a favorable opinion compared to 8% unfavorable. Its worth noting, however, that the ratio of favorable to unfavorable opinions has decreased over the past two years.

Question 11 *To clarify, the Port of Long Beach is a public agency responsible for managing the shipping terminals, commerce and navigation in the City's Harbor District. In general, do you have a favorable or unfavorable opinion of the Port of Long Beach, or do you not have an opinion either way?*

FIGURE 20 OPINION OF PORT OF LONG BEACH BY STUDY YEAR



† Statistically significant change ($p < 0.05$) between the 2013 and 2015 studies.

Figures 21-24 show how, among those with an opinion, the percentage of respondents with *favorable* opinions about the Port varied across a series of key subgroups. Although there was some variation in opinion—e.g., long-time Long Beach residents (10+ years) were more likely than others to express having a *very* favorable opinion of the Port—the most striking pattern in these figures is the relative consistency of opinion. Regardless of subgroup category, at least 79% of respondents with an opinion held a *favorable* opinion of the Port.

FIGURE 21 OPINION OF PORT OF LONG BEACH BY YEARS IN LONG BEACH, ENCOUNTERED PORT INFO IN PAST YEAR, ENVIRONMENTALIST & FRIENDS, FAMILY EMPLOYED AT PORT

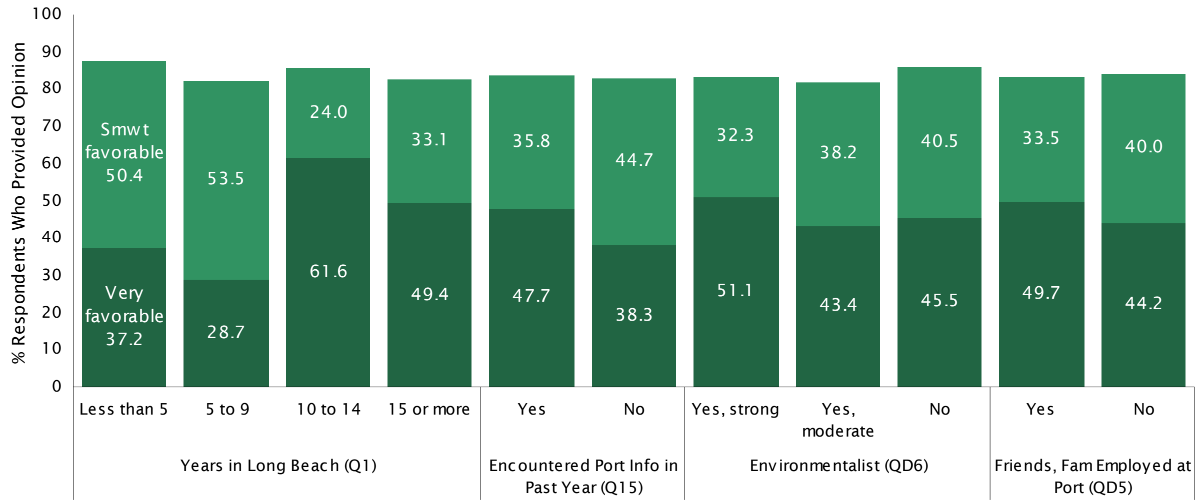


FIGURE 22 OPINION OF PORT OF LONG BEACH BY EDUCATION LEVEL, ETHNICITY & GENDER

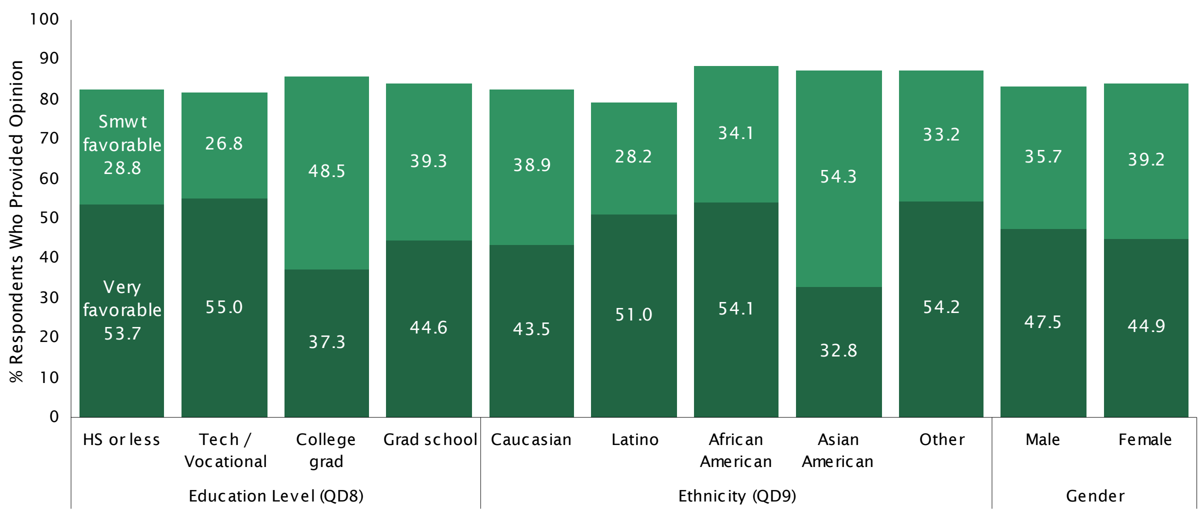


FIGURE 23 OPINION OF PORT OF LONG BEACH BY HOUSEHOLD INCOME & AGE

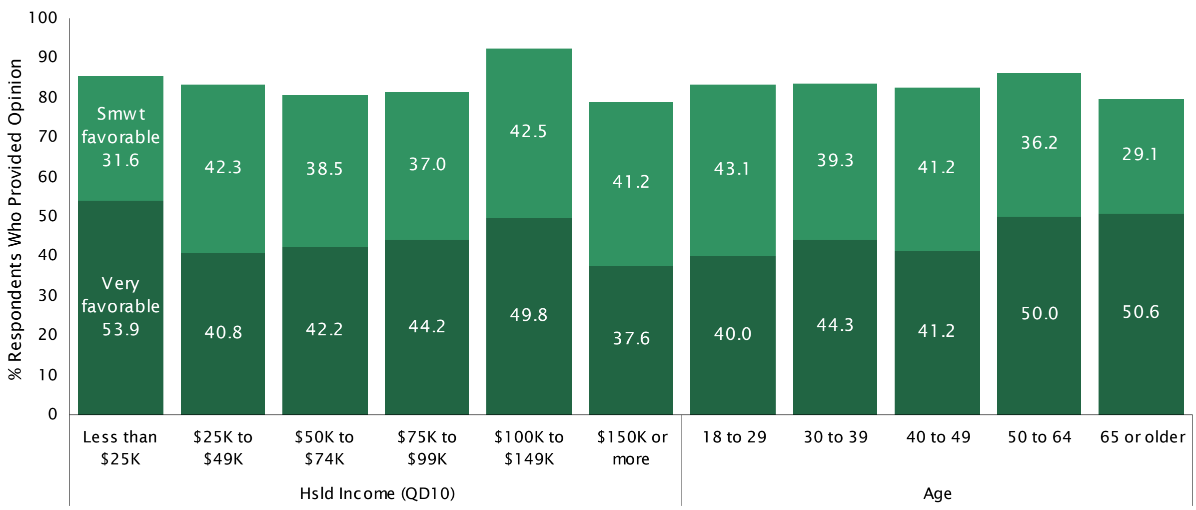
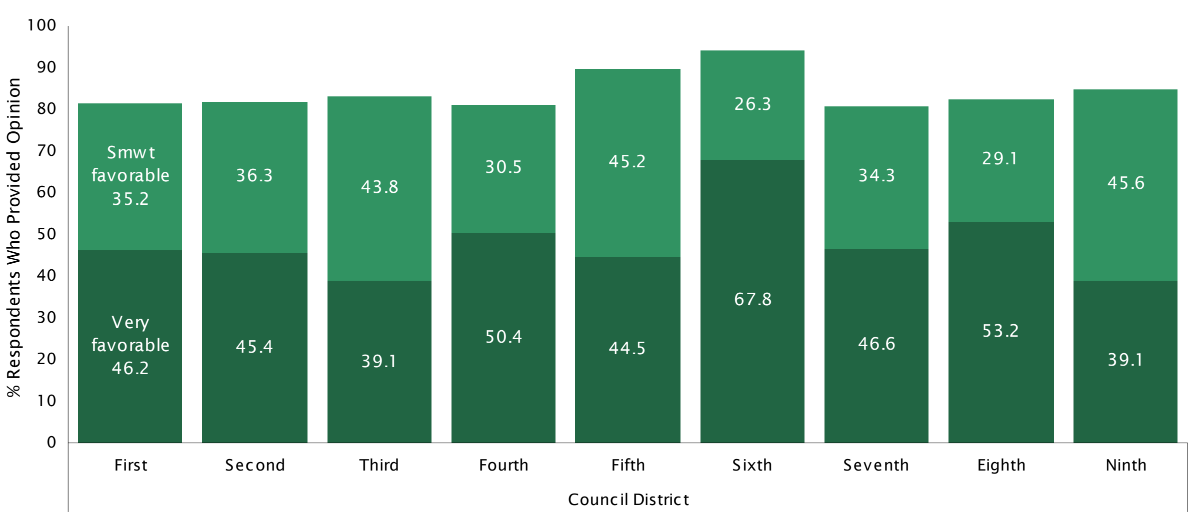


FIGURE 24 OPINION OF PORT OF LONG BEACH BY COUNCIL DISTRICT

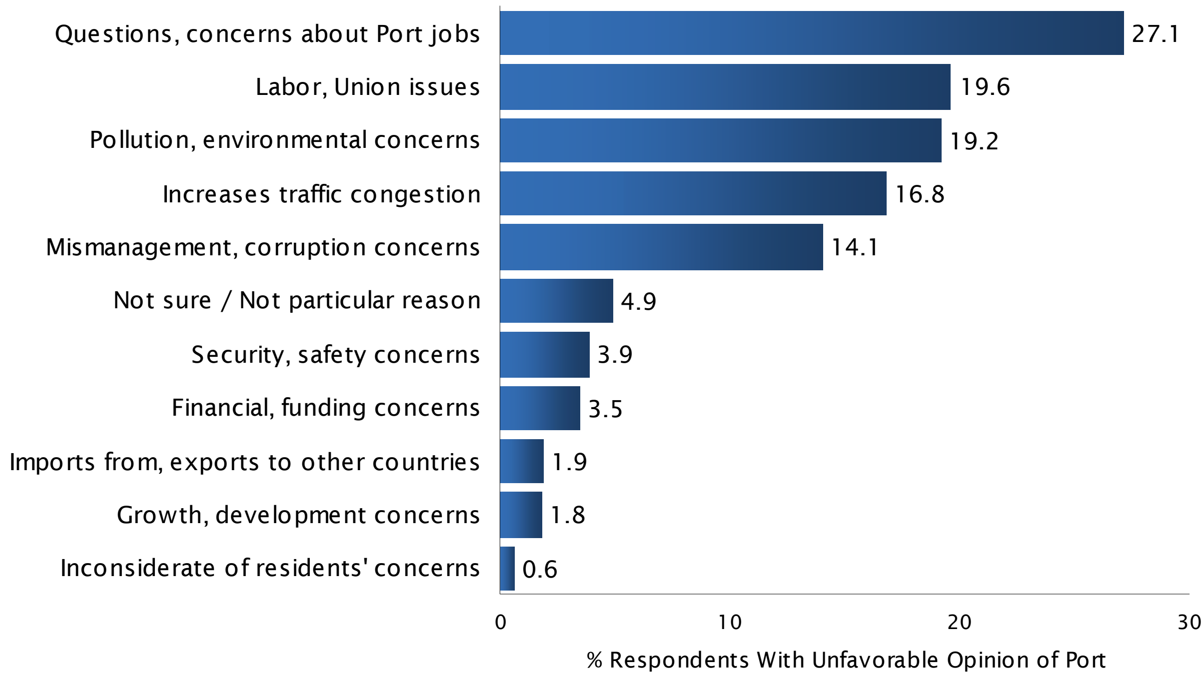


The small percentage (8%) of respondents who indicated that they had an unfavorable opinion of the Port of Long Beach were asked in a follow-up question if there was a particular reason for their opinion. Question 12 was asked in an open-ended manner, thereby allowing respondents to explain their position in their own words, without being prompted by—or restricted to—a particular list of reasons. True North later reviewed the verbatim responses and grouped them into the categories shown in Figure 25 on the next page.

Concerns about Port jobs was the most common reason why some voters held an unfavorable opinion about the Port in 2015, being mentioned by 27% of those who received Question 12. Other reasons mentioned included questions and concerns about labor and union issues (20%), environmental issues/pollution (19%), traffic congestion (17%), and perceptions of mismanagement/corruption (14%).

Question 12 *Is there a particular reason why you have an unfavorable opinion of the Port of Long Beach?*

FIGURE 25 REASON FOR UNFAVORABLE OPINION OF PORT OF LONG BEACH



CHARACTERIZING THE PORT The final question in this series was designed to profile how voters perceive the Port of Long Beach on a variety of important dimensions. Specifically, Question 13 presented respondents with 10 words or phrases and asked respondents whether they think the word or phrase accurately describes the Port of Long Beach as an agency. Figure 26 presents the words and phrases provided to respondents, as well as respondents' characterizations of the Port.

Overall, respondents generally characterized the Port in a positive way. A clear majority of Long Beach voters agreed that the Port is beneficial to the local economy (87%), is an important creator of jobs (83%), makes a positive difference in the community (72%), is effective (66%), cares about the environment (52%), and is involved in the community (52%). Just under half of all respondents perceived that the Port is visionary (48%), trustworthy (46%), and fiscally responsible (45%), with most of the remaining respondents being undecided/unsure. Just 20% of respondents felt that the Port does *not* care about residents' concerns.

For the interested reader, Table 8 shows how voters' characterizations of the Port have varied over the past eight years, as well as the difference in responses between 2015 and 2013. During the past two years, the percentage of respondents who characterized the Port as visionary and involved in the community decreased significantly.

Question 13 *Next, I'm going to read a series of words or phrases. For each I read, I'd like you to tell me whether, in your opinion, it accurately describes the Port of Long Beach as a public agency.*

Figure 26 Agreement With Descriptors of Port of Long Beach

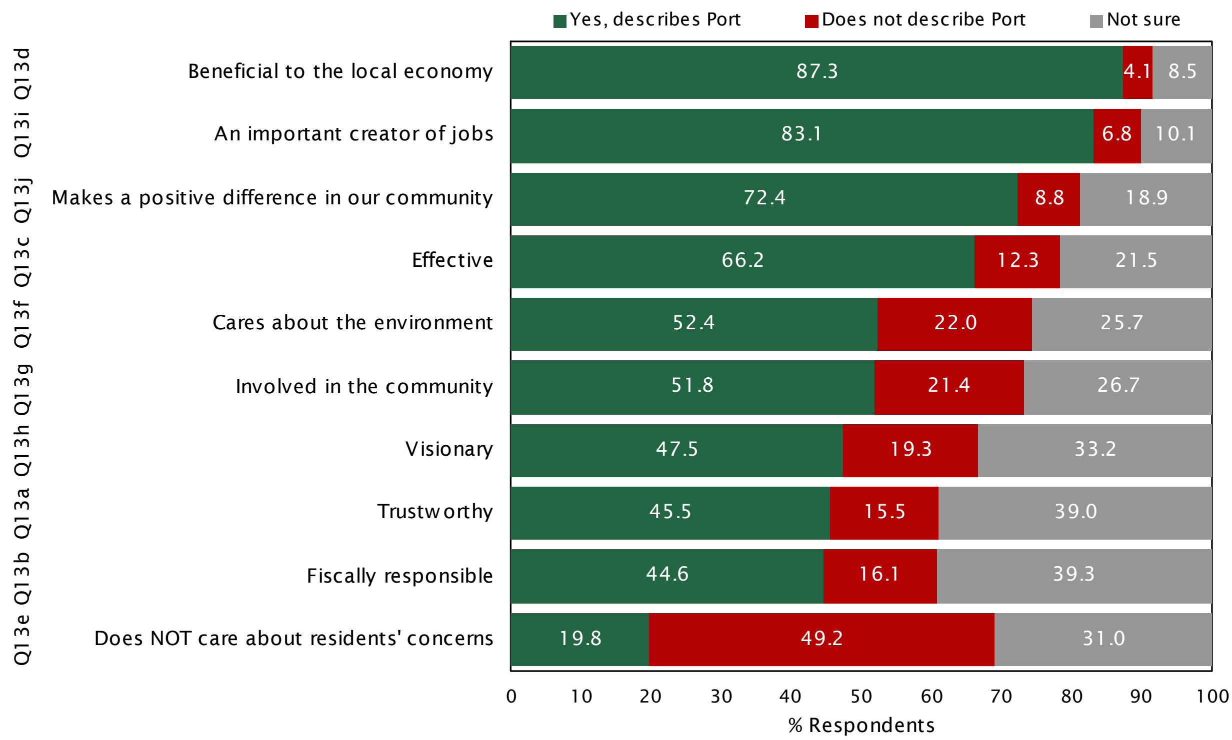


Table 8 Agreement With Descriptors of Port of Long Beach by Study Year

	Study Year							Change in Agreement
	2015	2013	2012	2011	2009	2008	2007	2013 to 2015
Does not care about residents' concerns	19.8	16.9	14.4	16.3	20.2	25.1	23.4	+2.9
Trustworthy	45.5	46.7	46.6	44.5	43.2	42.2	42.8	-1.3
Fiscally responsible	44.6	46.5	46.8	47.6	N/A	N/A	N/A	-1.9
Effective	66.2	68.5	68.7	68.3	64.2	62.7	65.4	-2.3
An important creator of jobs	83.1	85.6	82.5	79.4	N/A	N/A	N/A	-2.5
Makes a positive difference in our community	72.4	75.1	72.4	72.8	N/A	N/A	N/A	-2.7
Beneficial to the local economy	87.3	90.3	87.6	88.2	84.2	82.5	85.0	-2.9
Cares about the environment	52.4	55.5	56.9	57.8	55.5	50.8	45.7	-3.1
Visionary	47.5	53.7	49.3	47.0	47.3	41.9	45.0	-6.2†
Involved in the community	51.8	59.1	56.9	57.9	53.7	50.2	50.5	-7.3†

† Statistically significant change ($p < 0.05$) between the 2013 and 2015 studies.

Figures 27 and 28 on the next page demonstrate how voters' views of the Port being beneficial to the local economy and being involved in the community, respectively, varied by Council District.

FIGURE 27 AGREEMENT THAT PORT IS BENEFICIAL TO LOCAL ECONOMY BY COUNCIL DISTRICT

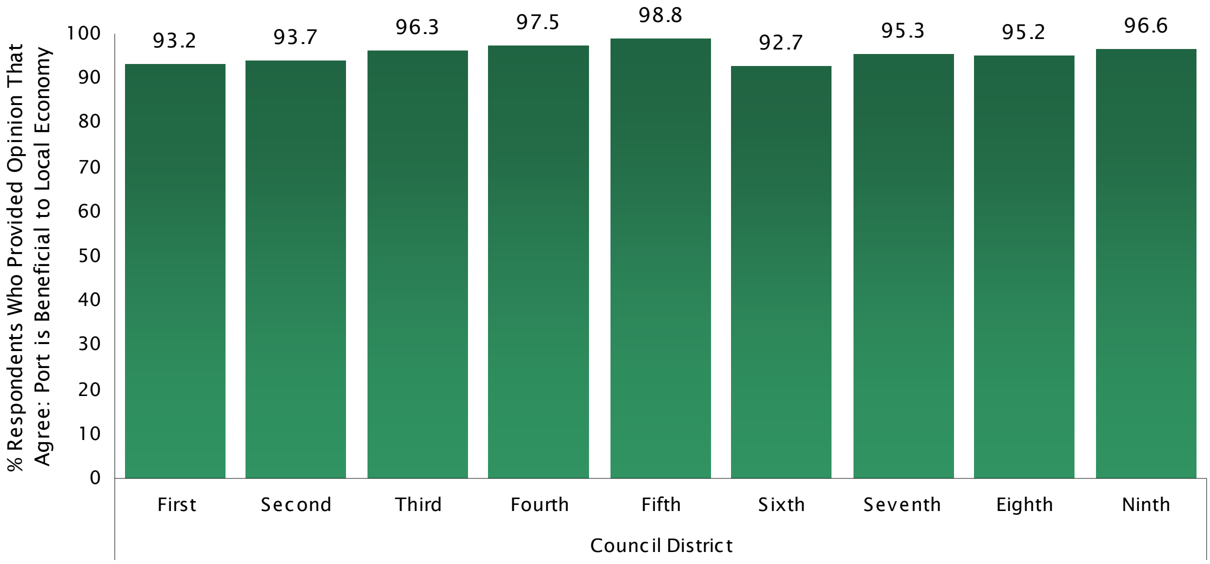
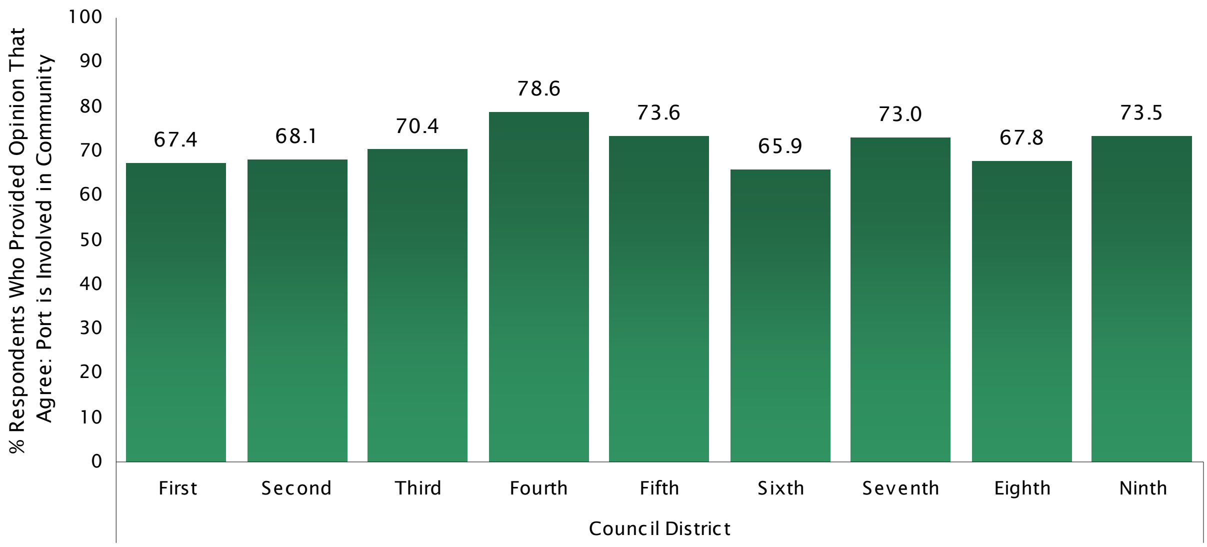


FIGURE 28 AGREEMENT THAT PORT IS INVOLVED IN COMMUNITY BY COUNCIL DISTRICT



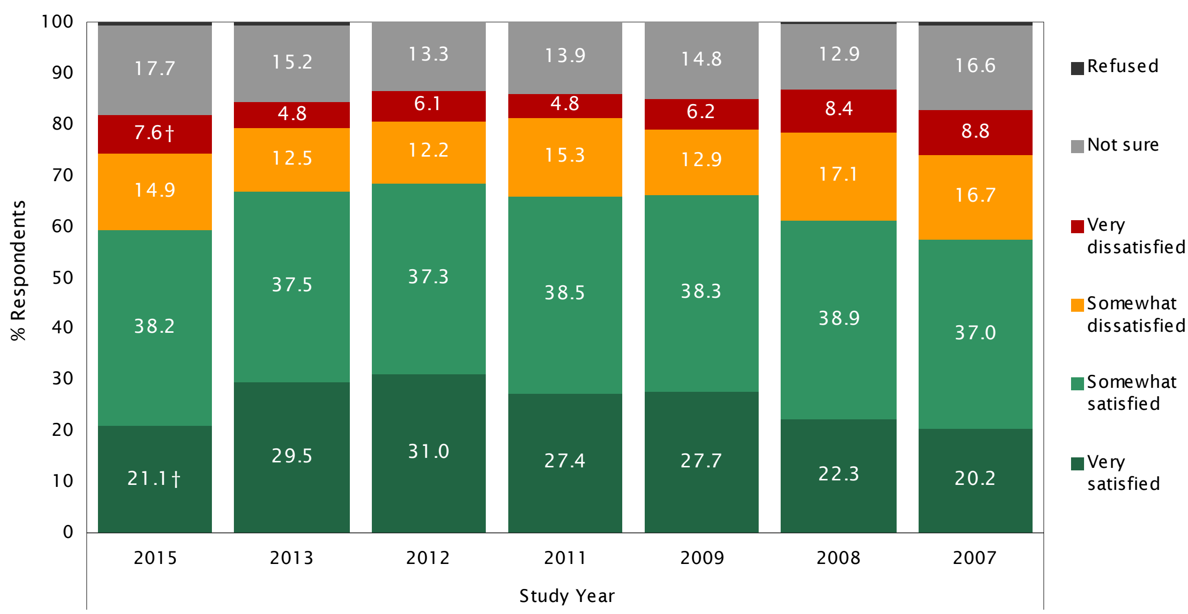
Port Communications

In this section of the report we present the results of questions that were designed to measure respondents' satisfaction with the Port's efforts to communicate with residents, profile respondents' exposure to Port-related information in recent months, as well as identify the most effective ways for the Port to communicate with residents.

OVERALL SATISFACTION Question 14 of the survey asked residents to report their overall satisfaction with the Port's efforts to communicate with residents through newsletters, television, the Internet, and other means. Overall, 59% of respondents indicated that they were satisfied with the Port's efforts in this respect in 2015, with 21% indicating that they were *very* satisfied (Figure 29). The remaining respondents were either dissatisfied with the Port's communication efforts (22%) or unsure of their opinion (18%). Over the past two years, there was a statistically significant decline the percentage who indicated they were very satisfied, and a significant increase in the percentage who reported being very dissatisfied with the Port's communication efforts.

Question 14 *Overall, are you satisfied or dissatisfied with the Port's efforts to communicate with residents through newsletters, television, the Internet, and other means?*

FIGURE 29 SATISFACTION WITH COMMUNICATION BY STUDY YEAR



† Statistically significant change ($p < 0.05$) between the 2013 and 2015 studies.

The following figures (Figures 30-33) display how overall satisfaction with the Port's efforts to communicate with residents varied in 2015 across key voter subgroups. Although levels of satisfaction did vary by some characteristics—most notably by overall opinion about the Port—once again the most striking pattern is the relative consistency of the results. With the exception of those who held an unfavorable opinion of the Port, approximately two-thirds (or more) of voters indicated that they were satisfied with the Port's communication efforts.

FIGURE 30 SATISFACTION WITH COMMUNICATION BY YEARS IN LONG BEACH, ENCOUNTERED PORT INFO IN PAST YEAR & OPINION OF PORT OF LONG BEACH

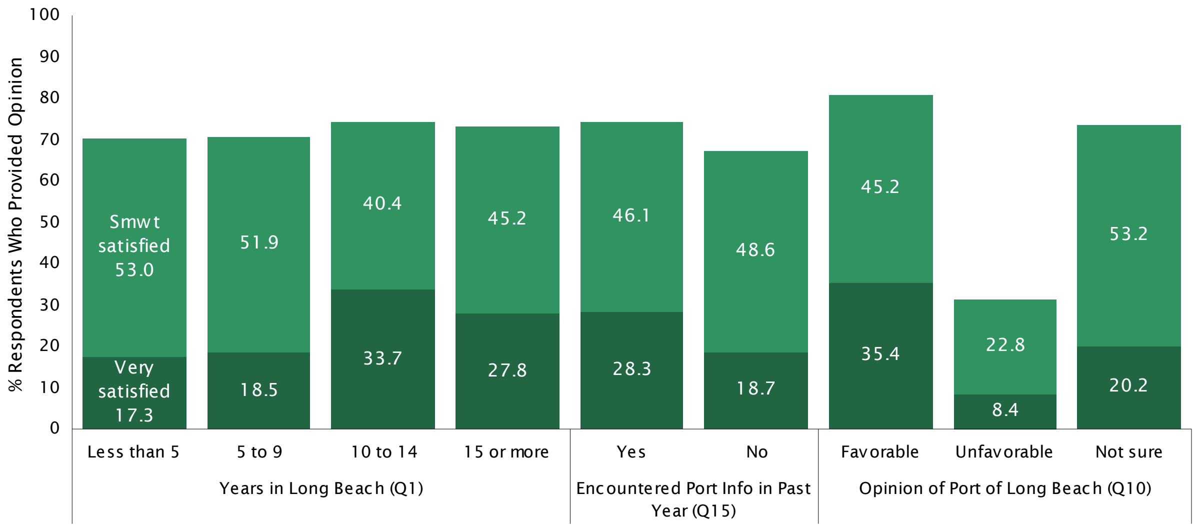


FIGURE 31 SATISFACTION WITH COMMUNICATION BY ENVIRONMENTALIST, EMPLOYMENT STATUS & GENDER

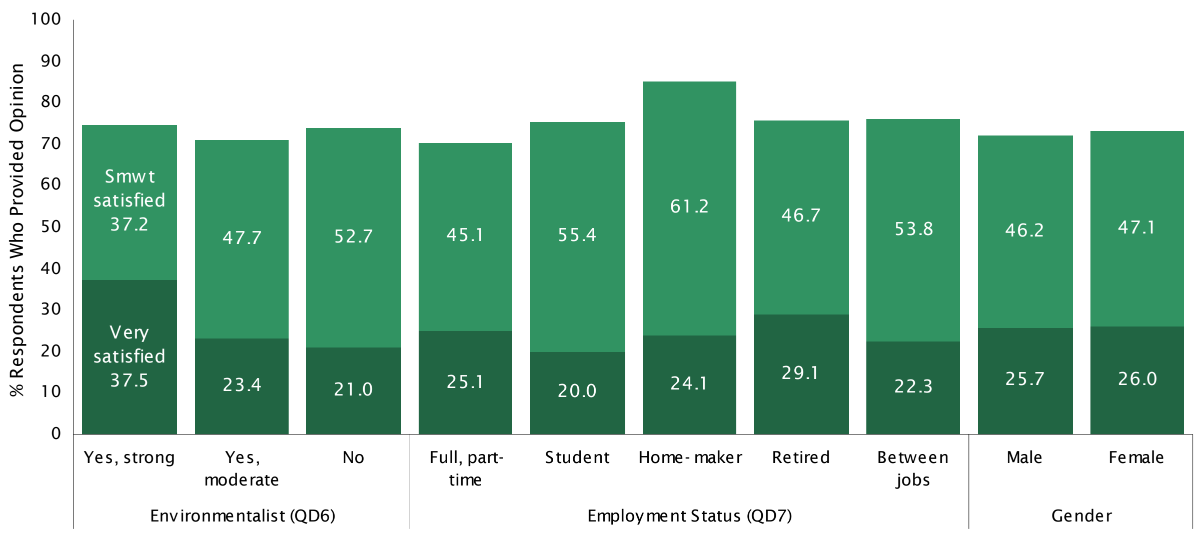


FIGURE 32 SATISFACTION WITH COMMUNICATION BY ETHNICITY & AGE

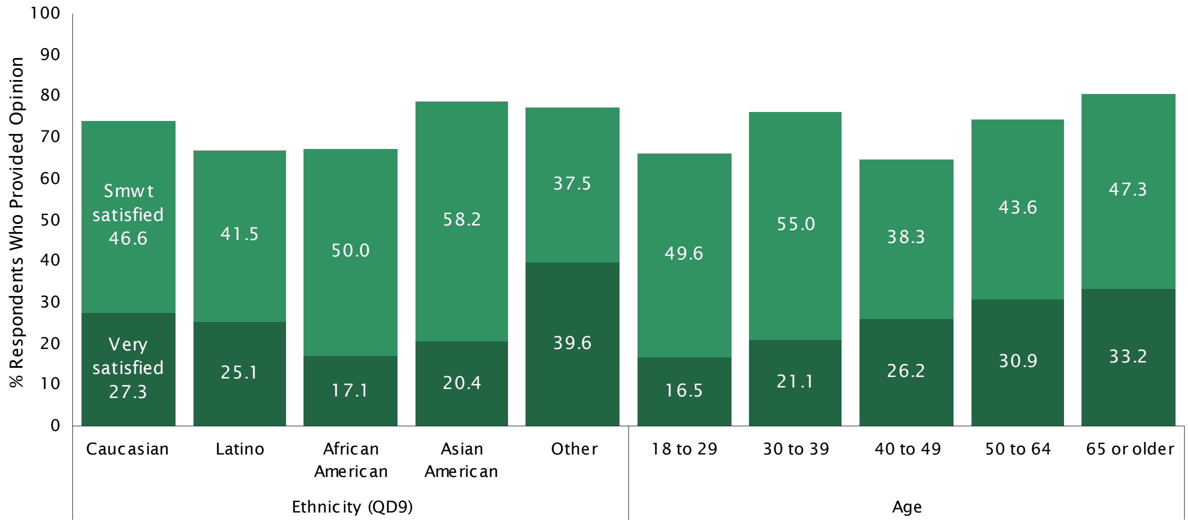
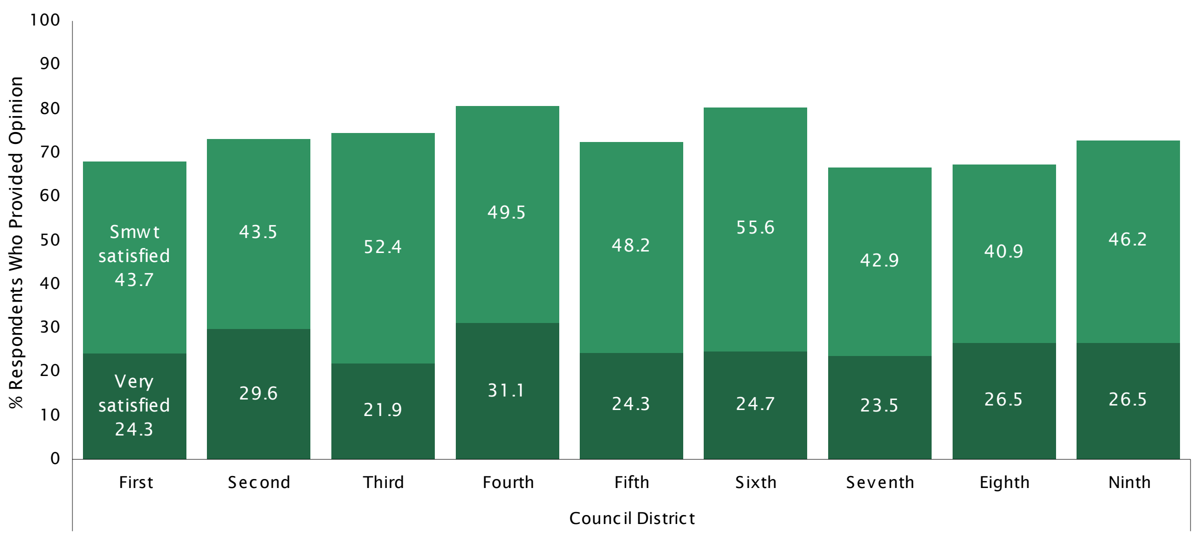


FIGURE 33 SATISFACTION WITH COMMUNICATION BY COUNCIL DISTRICT



NEWS ABOUT THE PORT All respondents were next asked whether—in the past year—they recalled hearing, reading, or seeing any news stories, public service announcements, or advertisements relating to the Port of Long Beach. Overall, more than two-thirds of voters (70%) indicated that they did recall being exposed to information about the Port of Long Beach in the period of interest (Figure 34), which is similar to the findings of the 2013 survey.

Recalled exposure was greatest among those who had lived in the City at least 15 years, home owners, strong environmentalists, individuals currently in-between jobs, those with a graduate degree, Caucasians, high income households, males, voters over the age of 49, and individuals who reside in the Third and Fifth Council Districts (see Figures 35-39).

Question 15 *In the past year, do you recall hearing, reading or seeing any news stories, public service announcements, or advertisements relating to the Port of Long Beach?*

FIGURE 34 ENCOUNTERED PORT OF LONG BEACH INFO IN PAST YEAR BY STUDY YEAR

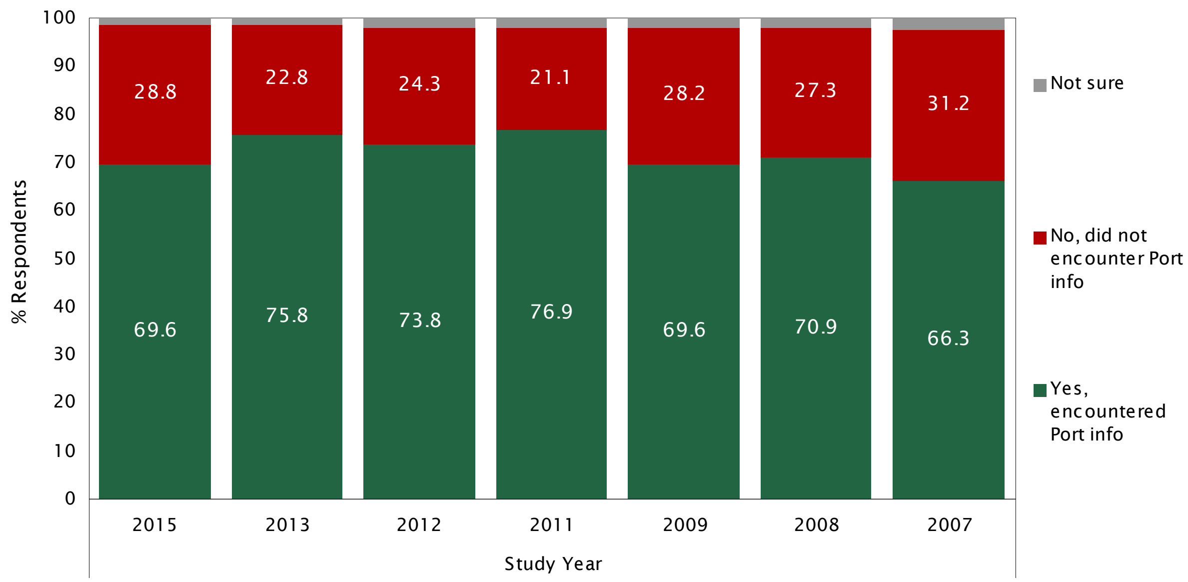


FIGURE 35 ENCOUNTERED PORT OF LONG BEACH INFO IN PAST YEAR BY YEARS IN LONG BEACH, HOME OWNERSHIP STATUS & ENVIRONMENTALIST

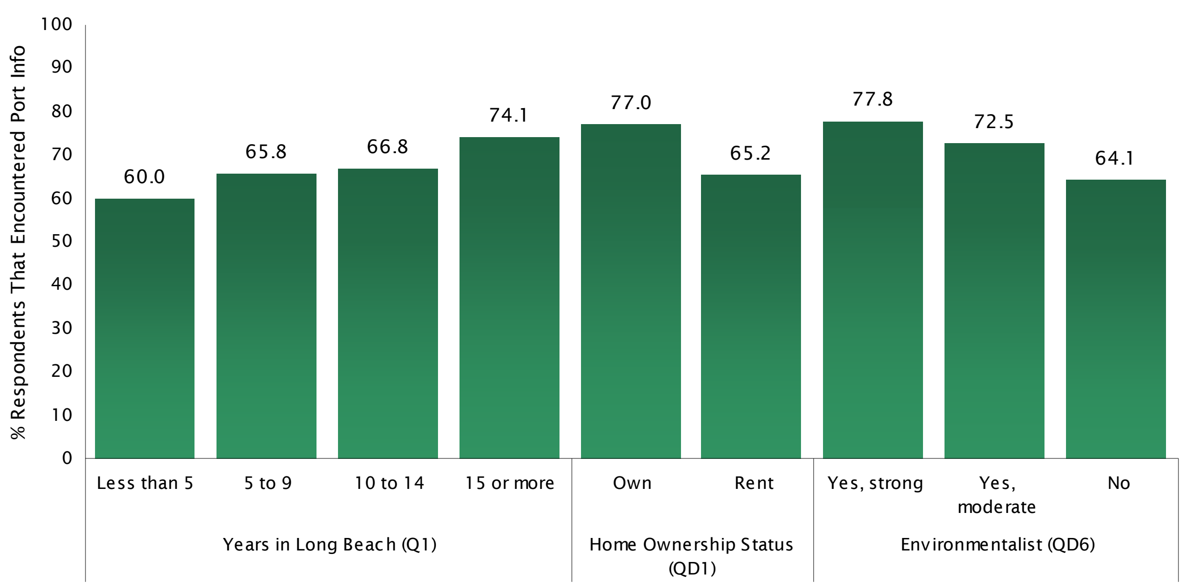


FIGURE 36 ENCOUNTERED PORT OF LONG BEACH INFO IN PAST YEAR BY EMPLOYMENT STATUS & EDUCATION LEVEL

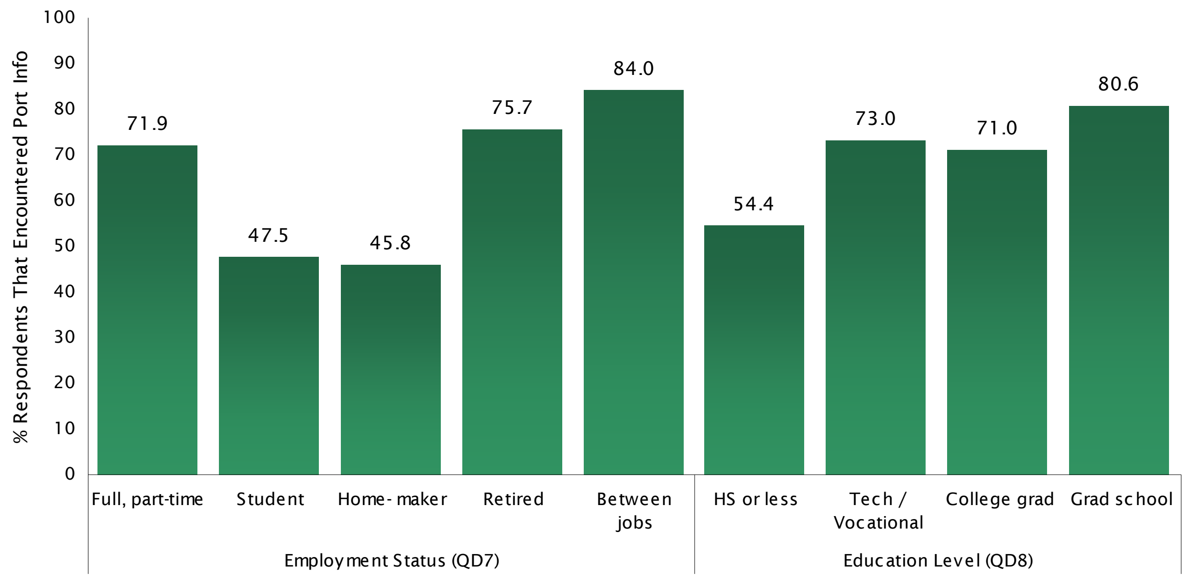


FIGURE 37 ENCOUNTERED PORT OF LONG BEACH INFO IN PAST YEAR BY ETHNICITY & HOUSEHOLD INCOME

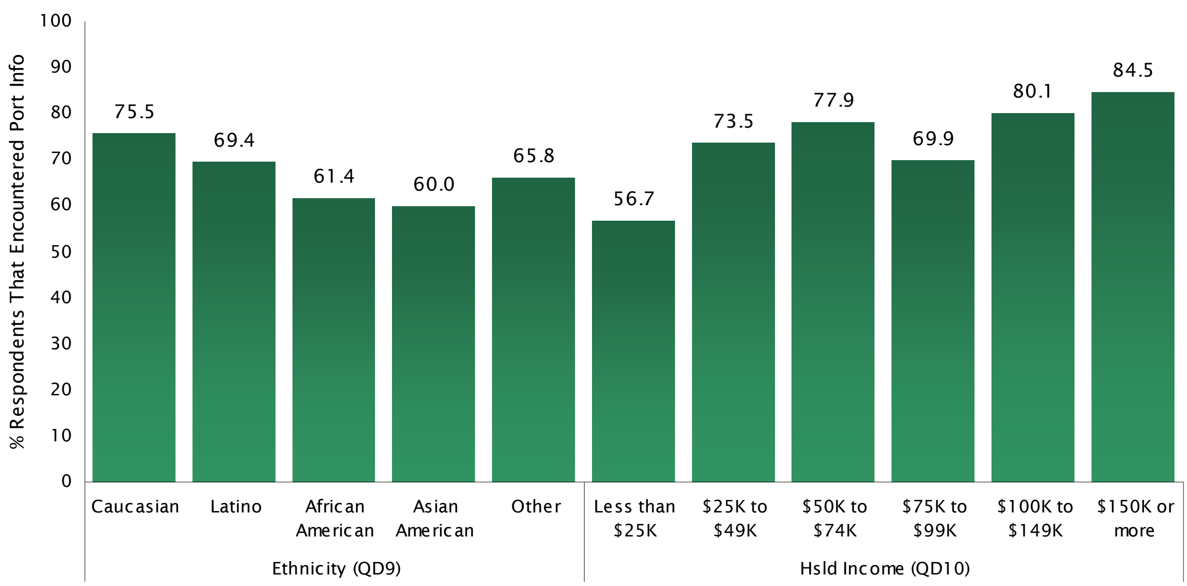


FIGURE 38 ENCOUNTERED PORT OF LONG BEACH INFO IN PAST YEAR BY GENDER & AGE

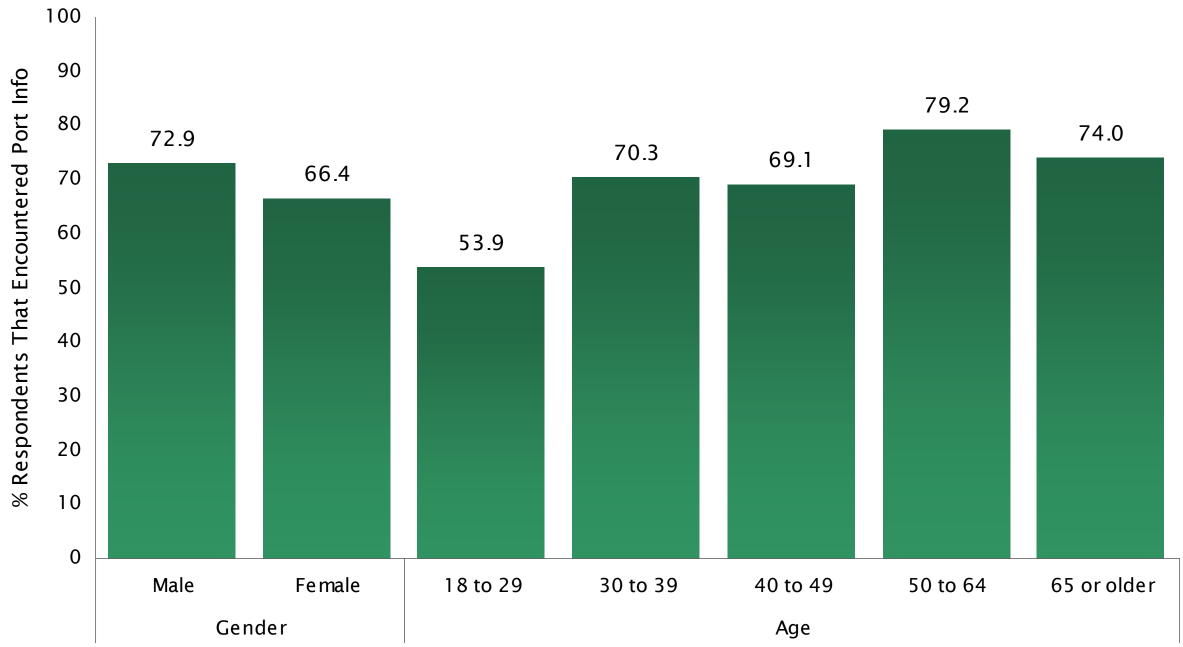
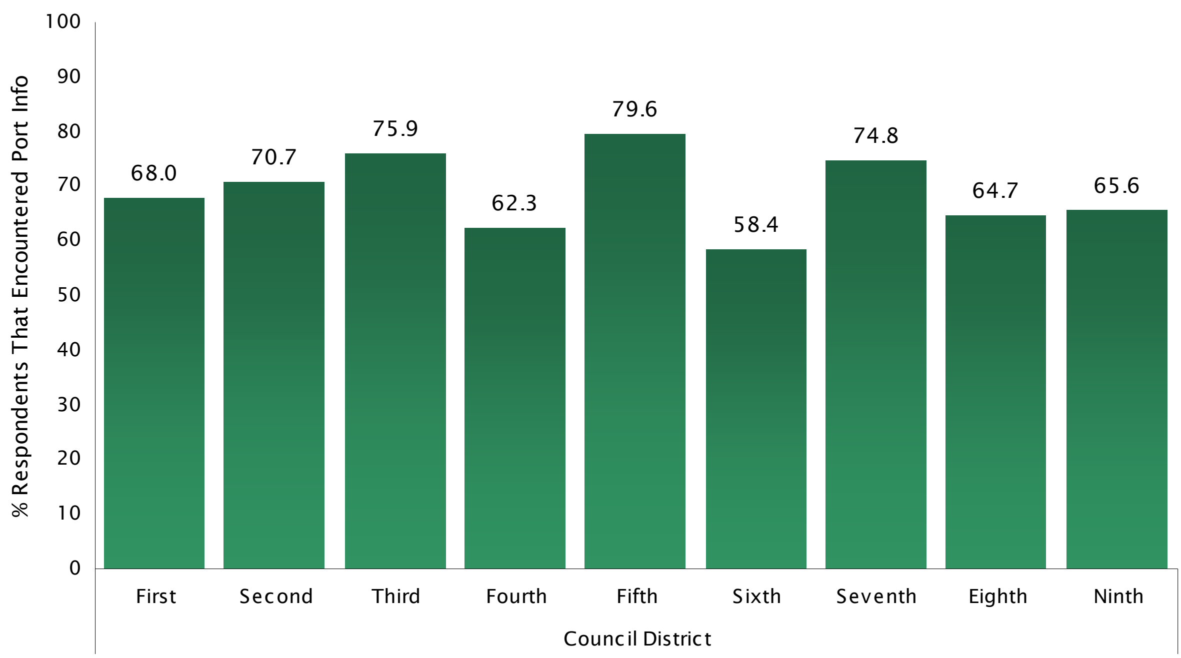


FIGURE 39 ENCOUNTERED PORT OF LONG BEACH INFO IN PAST YEAR BY COUNCIL DISTRICT



SOURCE OF PORT-RELATED NEWS The next question in this series asked voters who recalled being exposed to information about the Port of Long Beach in the year prior to the interview to indicate *where* they encountered information about the Port. Question 16 was asked in an open-ended manner so as not to prompt respondents with a particular list of sources, and participants were allowed to mention multiple sources. Respondents answers were subsequently grouped into the categories shown in Figure 40.

Television news (29%), the Internet in general (24%), direct mail (16%), and the *Long Beach Press-Telegram* (16%) were the most frequently mentioned sources for Port-related information in 2015. Other commonly mentioned sources included other newspapers/periodicals (10%), radio news (10%), the Port Newsletter (8%), the *Los Angeles Times* (8%), friends/family (7%), and the *Downtown* and *Grunion Gazettes* (5%). Table 9 on the next page lists the top five information sources by study year.

Question 16 *Where did you encounter information about the Port?*

FIGURE 40 SOURCES FOR PORT INFORMATION IN PAST YEAR

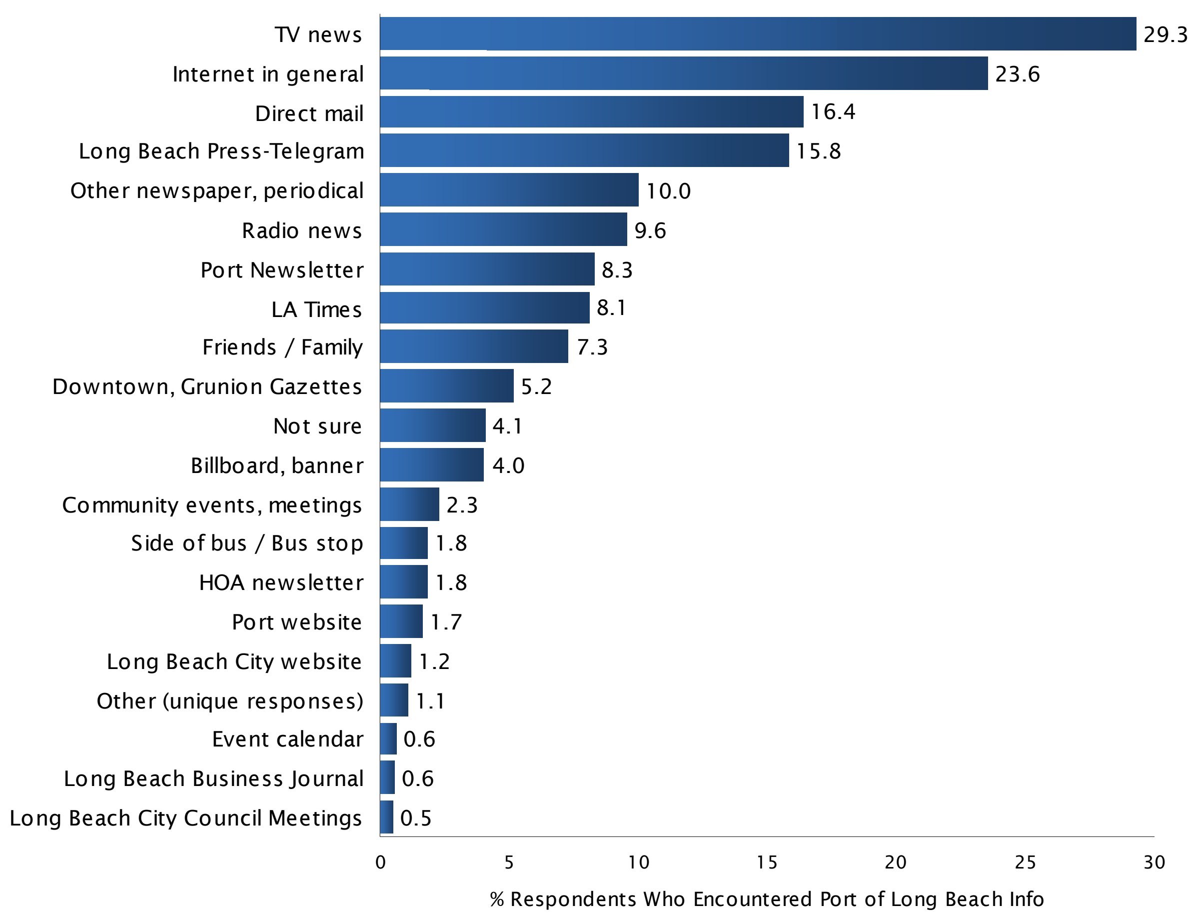


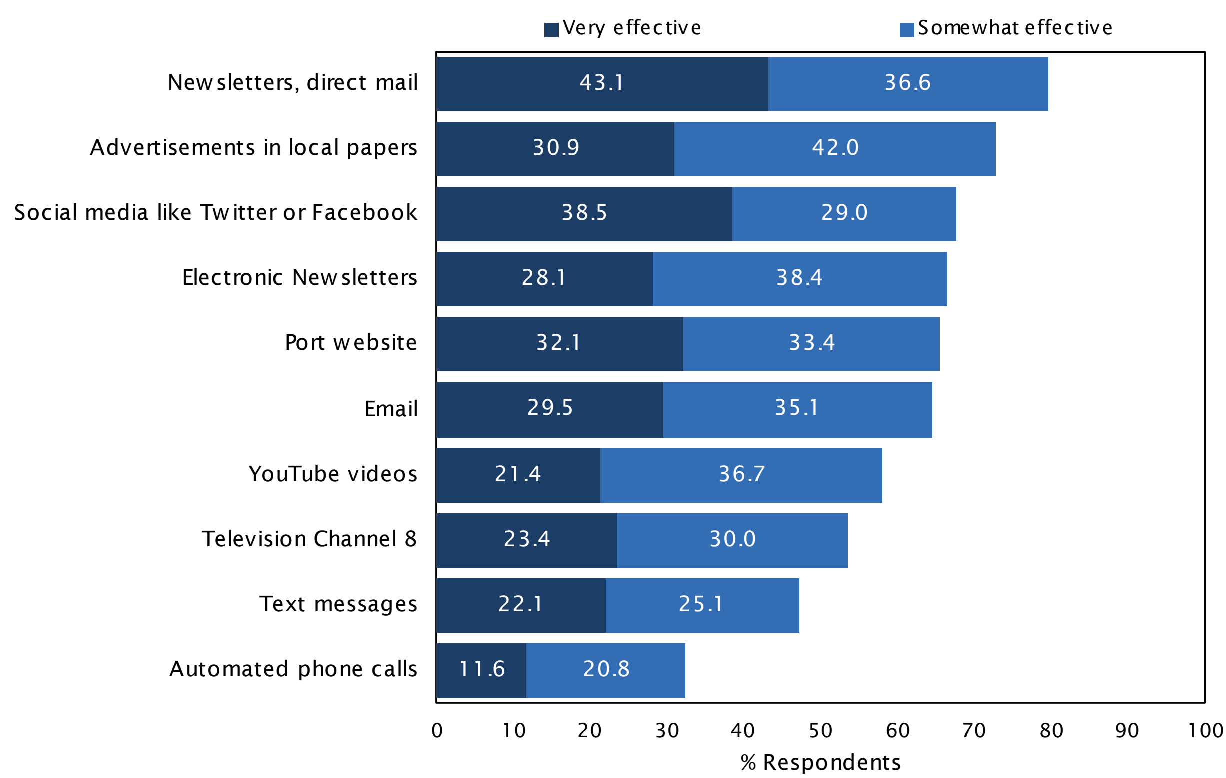
Table 9 Sources for Port Information in Past Year by Study Year

Study Year						
2015	2013	2012	2011	2009	2008	2007
TV news	Direct mail	Port Newsletter	Long Beach Press-Telegram	Long Beach Press-Telegram	TV news	Long Beach Press-Telegram
Internet in general	Long Beach Press-Telegram	Direct mail	Direct mail	TV news	Long Beach Press-Telegram	TV news
Direct mail	TV news	Long Beach Press-Telegram	TV news	Direct mail	Port Newsletter	Direct mail
Long Beach Press-Telegram	Port Newsletter	TV news	Port Newsletter	Port Newsletter	Direct mail	Port Newsletter
Other newspaper periodical	Internet in general	Internet in general	Internet in general	Downtown, Grunion Gazettes	LA Times	LA Times

COMMUNICATION PREFERENCES The final question in this series presented respondents with each of the methods shown to the left of Figure 41 and simply asked—for each—whether it would be an effective way for the Port to communicate with them.

Question 17 *As I read the following ways that the Port of Long Beach can communicate with residents, I'd like to know if you think they would be a very effective, somewhat effective, or not at all effective way for the Port to communicate with you.*

Figure 41 Effectiveness of Communication Methods



Overall, respondents indicated that newsletters/direct mail to the home was the most effective method (80% very or somewhat effective), followed by advertisements in local papers (73%). Second-tier methods included social media like Twitter or Facebook (68%), electronic newsletters (67%), the Port's website (66%), and email (65%). Overall, about half of Long Beach residents indicated that YouTube videos (58%), Television Channel 8 (53%), and text messages (47%) were effective means for the Port to communicate with them, while less than one-third (32%) viewed automated telephone calls to be effective. Table 10 shows how the perceived effectiveness of communication channels varied by respondent age.

TABLE 10 EFFECTIVENESS OF COMMUNICATION METHODS BY AGE (SHOWING % VERY EFFECTIVE)

	Age (QD1)				
	18 to 29	30 to 39	40 to 49	50 to 64	65 or older
Newsletters, direct mail	35.9	40.6	39.6	54.9	41.0
Social media	57.5	59.4	36.0	28.2	11.3
Ads in local papers	35.9	36.2	33.1	38.5	14.7
Port website	29.3	27.5	27.3	36.6	32.3
Email	34.1	37.0	33.8	26.3	17.7
Electronic Newsletters	34.7	37.7	30.2	23.0	15.7
Television Channel 8	26.3	19.6	23.7	26.8	20.3
YouTube videos	31.1	26.1	25.9	20.2	6.7
Text messages	30.5	30.4	22.3	14.1	10.0
Automated phone calls	10.8	13.8	13.7	10.8	10.3

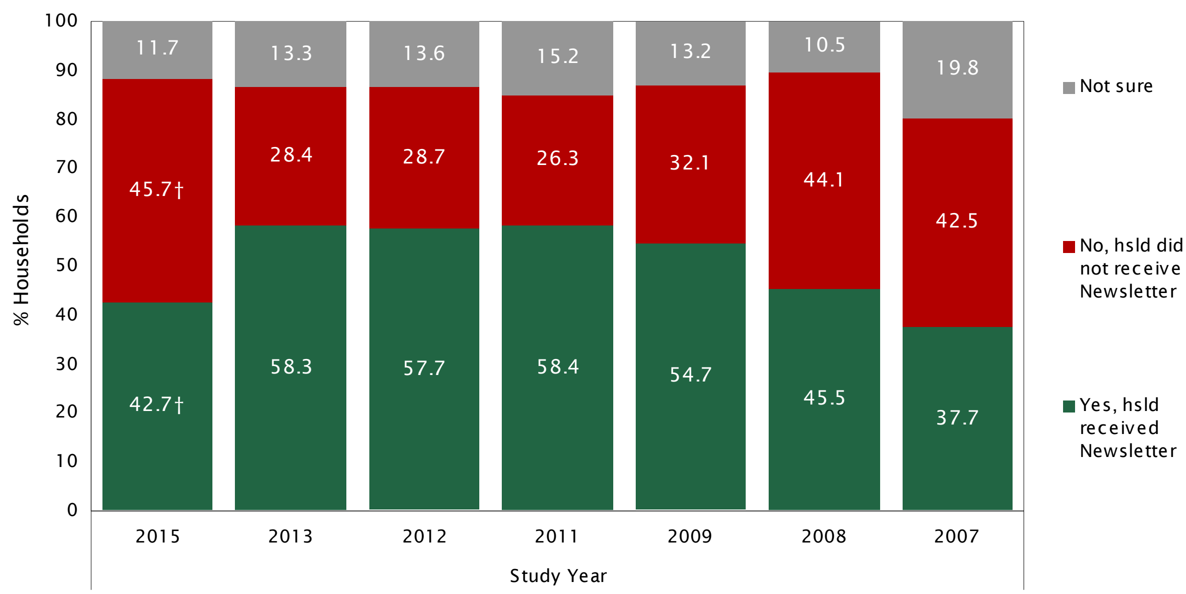
Re:Port & Website

At this point, the survey began to focus on Port-sponsored sources of information. In this section, we present the results of several questions that addressed residents' utilization and opinions of the Port's newsletter, website and outdoor advertising.

RE:PORT NEWSLETTER The Port of Long Beach's newsletter *Re:Port* is mailed on a quarterly basis to every postal customer in the City, is available at most Port facilities, and is also available online at the Port's website. The newsletter updates residents about Port-related news and information, educates residents about the industry and logistics of shipping cargo, and is an important vehicle for conveying policy and operational changes that have impacts on local conditions such as air quality, water quality, and traffic circulation.

Question 18 *In the past year, did your household receive the Port's newsletter, called the Re:Port?*

FIGURE 42 HOUSEHOLD RECEIVED PORT NEWSLETTER IN PAST YEAR BY STUDY YEAR



† Statistically significant change ($p < 0.05$) between the 2013 and 2015 studies.

Question 18 simply asked respondents whether their household had received the Port's newsletter in the 12 months prior to the survey. Approximately 43% of those who participated in the survey in 2015 recalled receiving the *Re:Port* newsletter during this period (Figure 42), which is down sharply from the level recorded in 2013. When compared to their respective counterparts, home owners, those who live in single-family households and condominiums, households that earn between $75,000 and $99,999 annually, and those located in the Fifth Council District were the most likely to recall receiving the newsletter (see Figures 43 and 44).

Figure 43 Household Received Port Newsletter in Past Year by Home Ownership Status, Home Type & Household Income

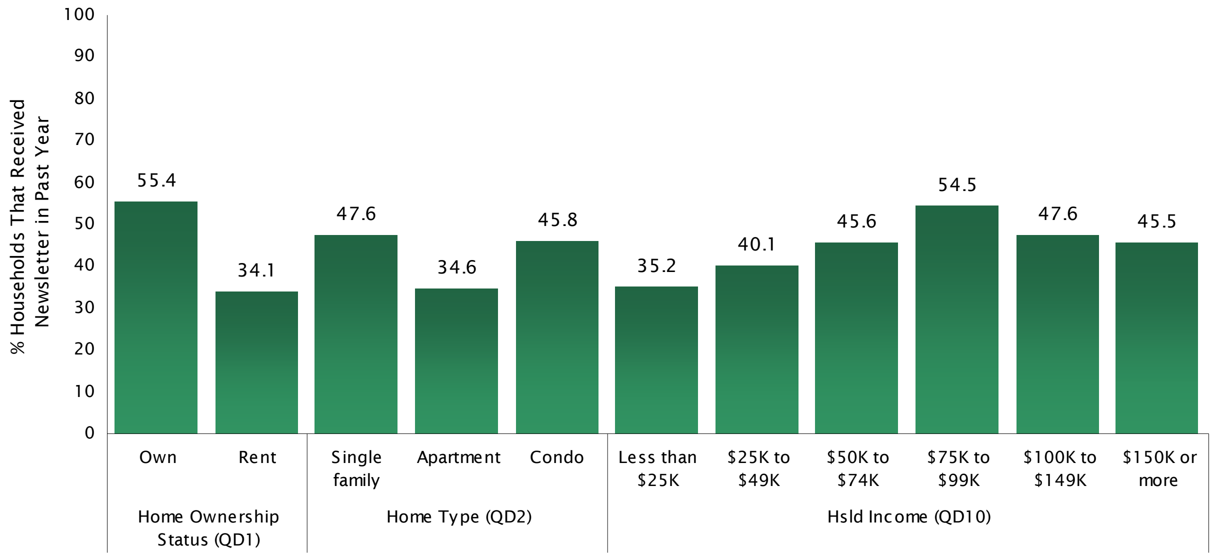
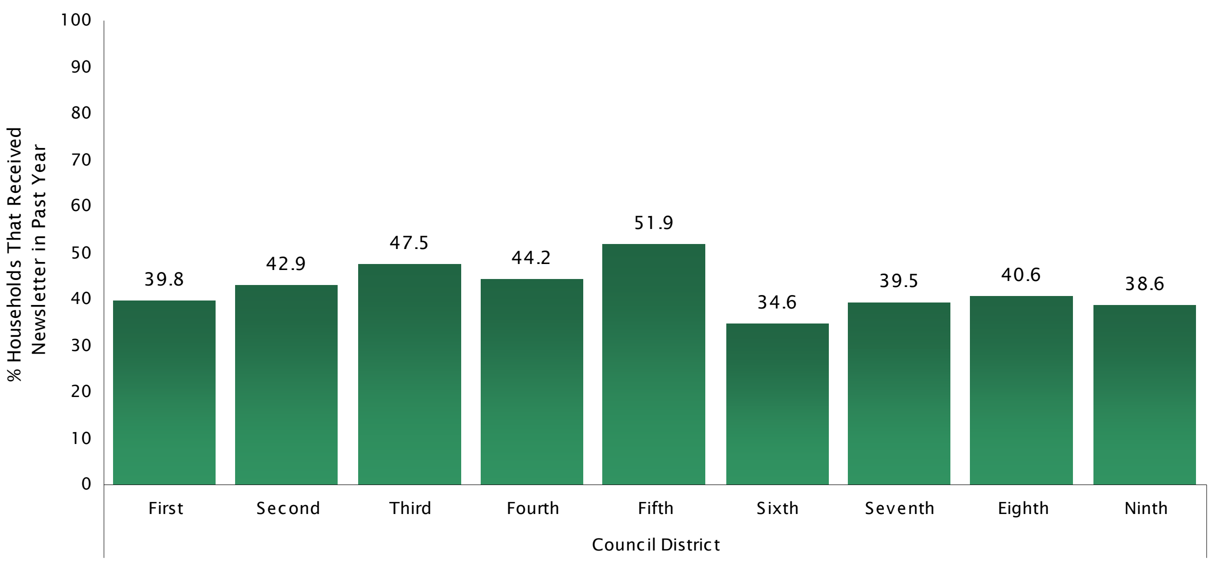


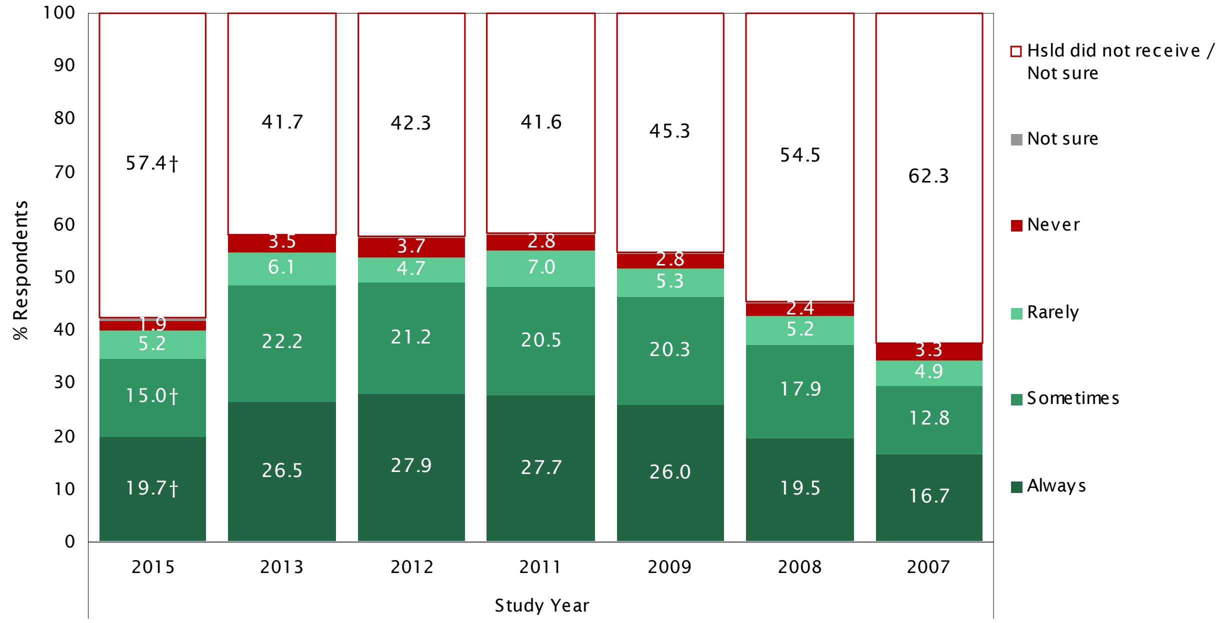
Figure 44 Household Received Port Newsletter in Past Year by Council District



For those who recalled receiving the *Re:Port* newsletter in the year prior to the interview, the survey followed-up by asking how often they read it when it arrives. Figure 45 combines the answers to Questions 18 and 19 to profile newsletter readership among *all* respondents—not just those who recalled receiving the newsletter. Among all respondents, 20% indicated that they always read the newsletter, 15% sometimes read it, 5% rarely read it, 2% receive the newsletter but never read it, and 57% indicated that they do not receive the newsletter. When compared to 2013, the frequency of newsletter readership declined significantly due to the much higher percentage of households that indicated they did not receive the newsletter.

Question 19 *How often would you say that you read the Port's newsletter when it arrives? Would you say that you always read it, sometimes read it, rarely read it, or never read it?*

FIGURE 45 FREQUENCY OF READING PORT NEWSLETTER IN PAST YEAR BY STUDY YEAR



† Statistically significant change ($p < 0.05$) between the 2013 and 2015 studies.

PORT WEBSITE The next question in this series asked voters whether, in the 12 months prior to the interview, they had visited the Port's website. As shown in Figure 46 on the next page, 19% of respondents in 2015 indicated that they had visited the site during this period, which is similar to the percentage recorded in 2013. Moreover, as shown in Figures 47-49, visiting the Port's website was strongly related to certain resident characteristics including environmental views, employment status, age, ethnicity, income, and Council District.

Question 20 *In the past year, have you visited the Port's website?*

FIGURE 46 VISITED PORT OF LONG BEACH WEBSITE IN PAST YEAR BY STUDY YEAR

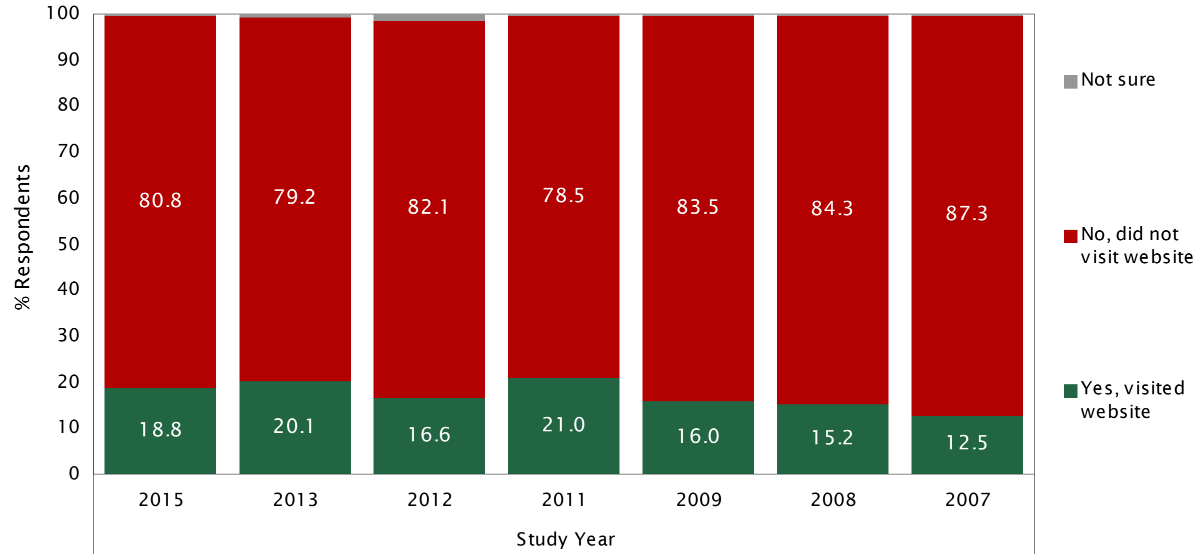


FIGURE 47 VISITED PORT OF LONG BEACH WEBSITE IN PAST YEAR BY ENVIRONMENTALIST, EMPLOYMENT STATUS & AGE

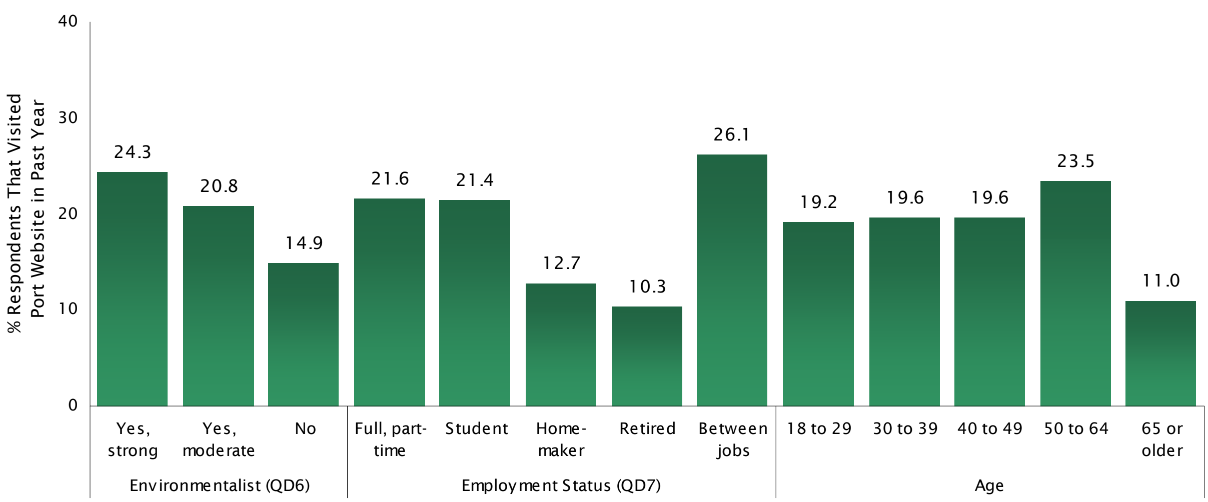


FIGURE 48 VISITED PORT OF LONG BEACH WEBSITE IN PAST YEAR BY ETHNICITY & HOUSEHOLD INCOME

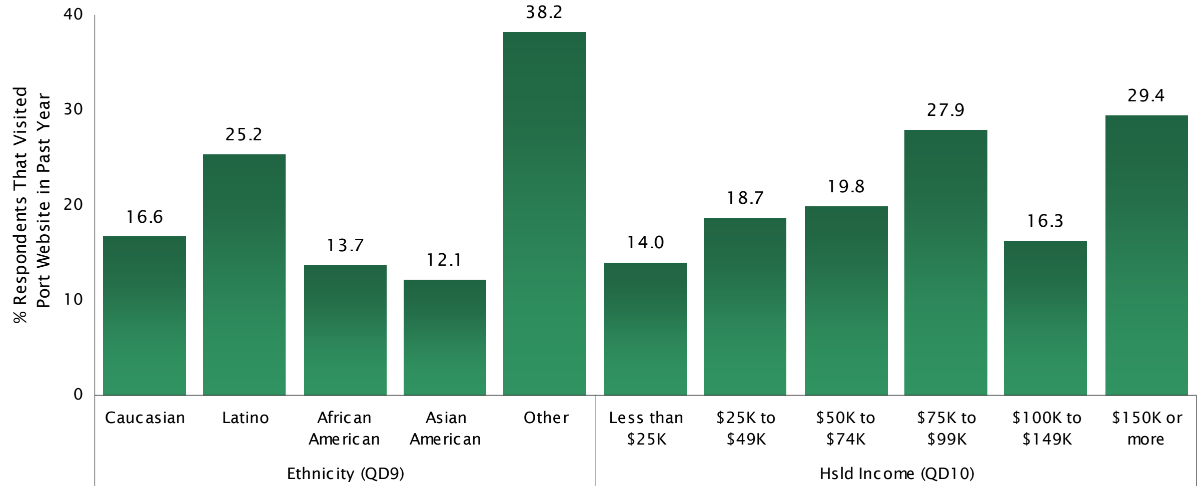
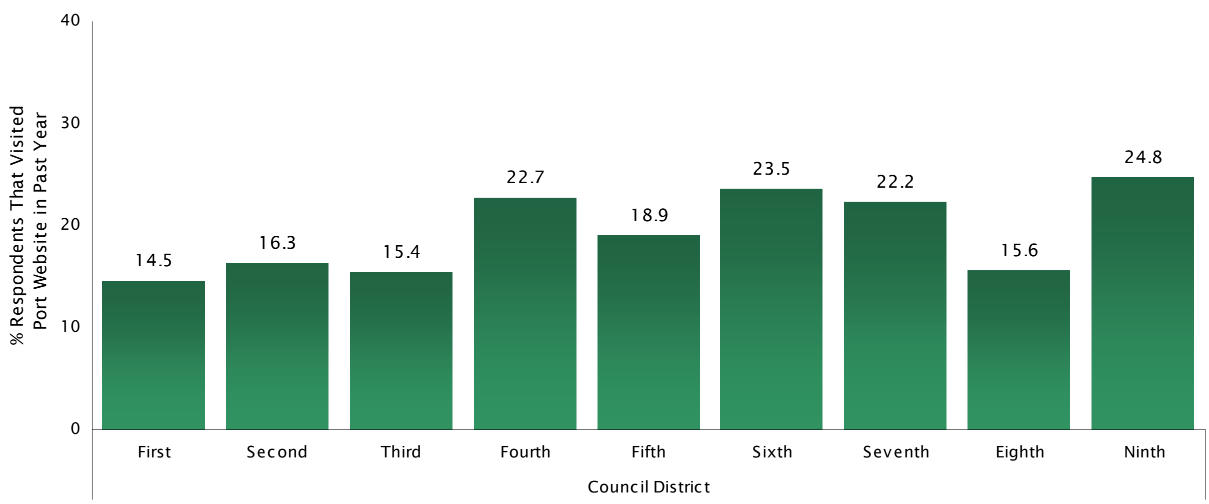


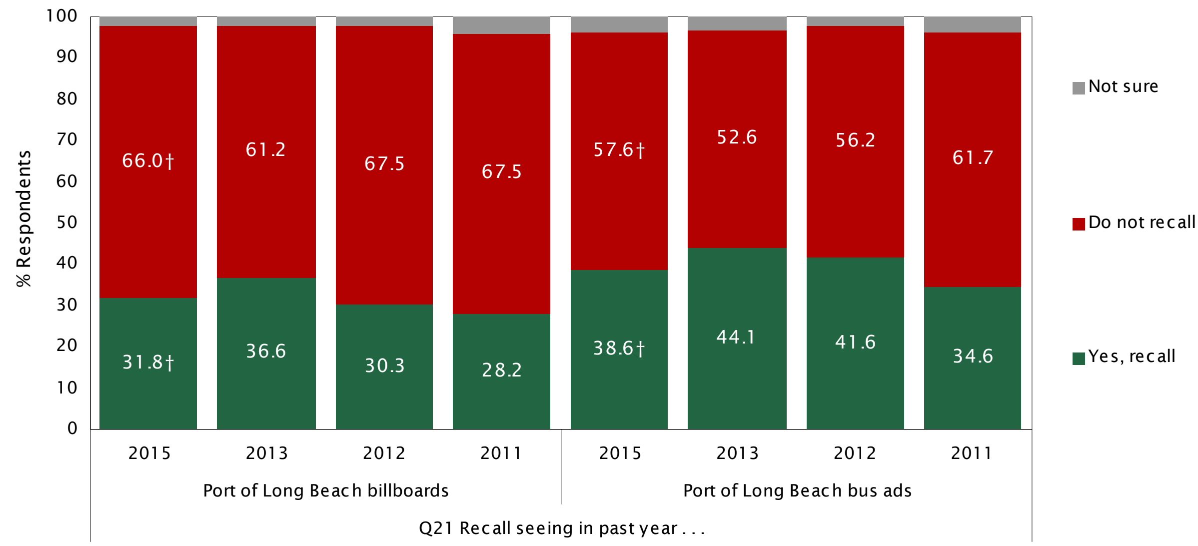
FIGURE 49 VISITED PORT OF LONG BEACH WEBSITE IN PAST YEAR BY COUNCIL DISTRICT



BANNERS AND BUS ADS The final question in this series asked respondents whether they recalled seeing Port of Long Beach billboards and/or advertisements on local buses during the prior year. Overall, approximately one-third of respondents recalled seeing Port billboards (32%) during the period of interest, which is significantly lower than the 2013 findings, but similar to the findings in 2011 and 2012. The corresponding figure for Port bus advertisements was higher at 39%, although this percentage was also significantly lower than the comparable figure in 2013 (44%). For the interested reader, Figures 51-53 on the following pages show how recalled exposure to Port of Long Beach billboards and bus advertisements varied across voter subgroups.

Question 21 *In the past year, do you recall seeing: _____ for the Port of Long Beach?*

FIGURE 50 RECALL SPECIFIC PORT OF LONG BEACH MEDIA IN PAST YEAR BY STUDY YEAR



† Statistically significant change (p < 0.05) between the 2013 and 2015 studies.

FIGURE 51 RECALL SPECIFIC PORT OF LONG BEACH MEDIA IN PAST YEAR BY OPINION OF PORT OF LONG BEACH & HOUSEHOLD INCOME

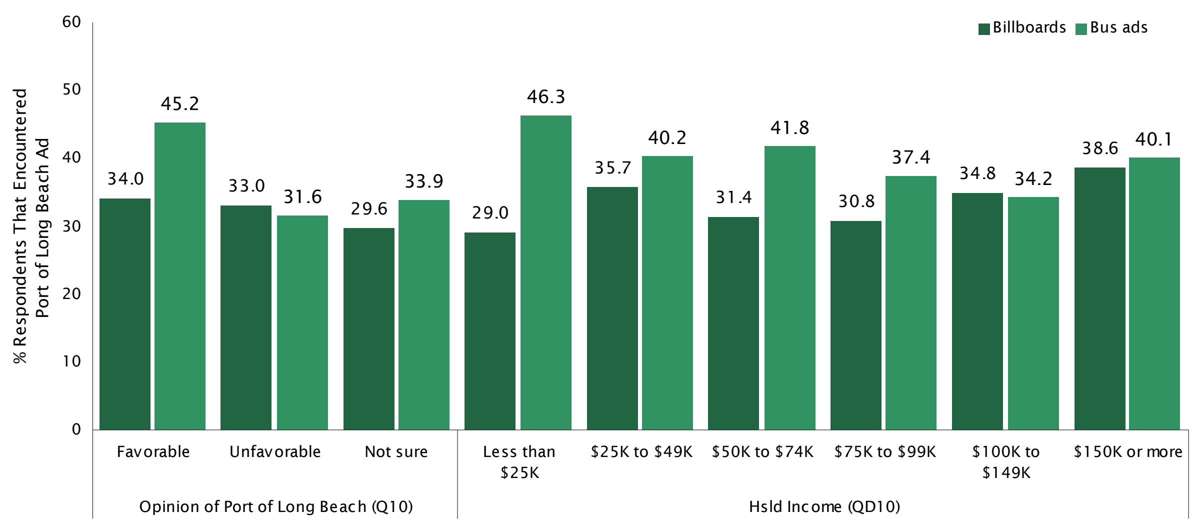


FIGURE 52 RECALL SPECIFIC PORT OF LONG BEACH MEDIA IN PAST YEAR BY ETHNICITY & AGE

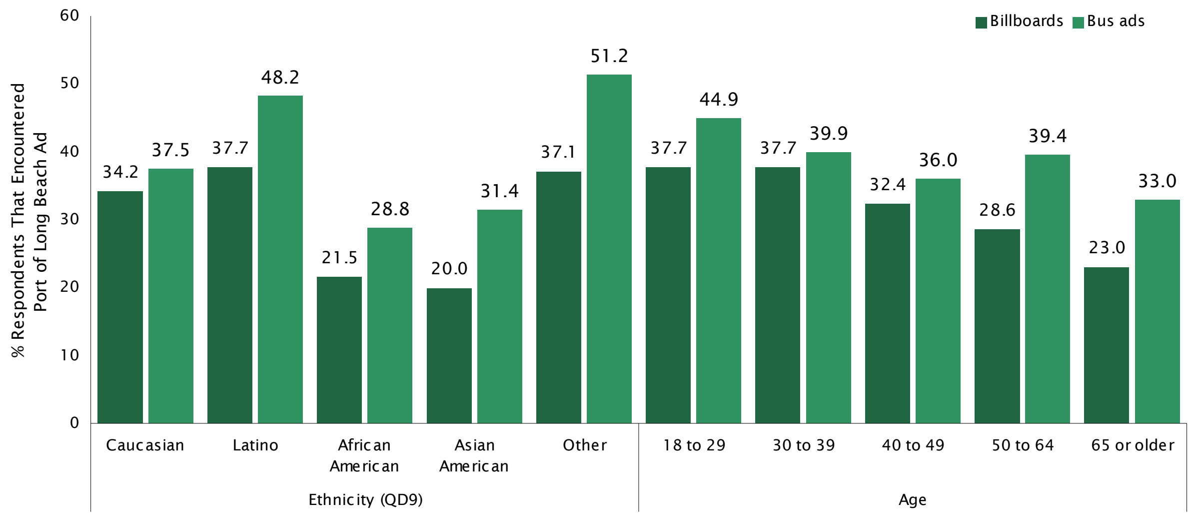
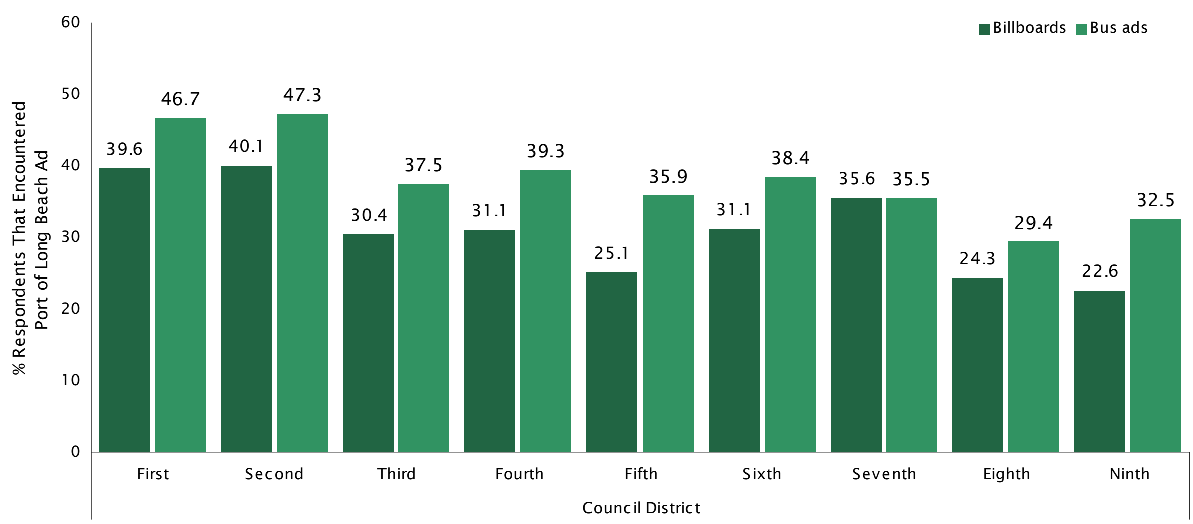


FIGURE 53 RECALL SPECIFIC PORT OF LONG BEACH MEDIA IN PAST YEAR BY COUNCIL DISTRICT



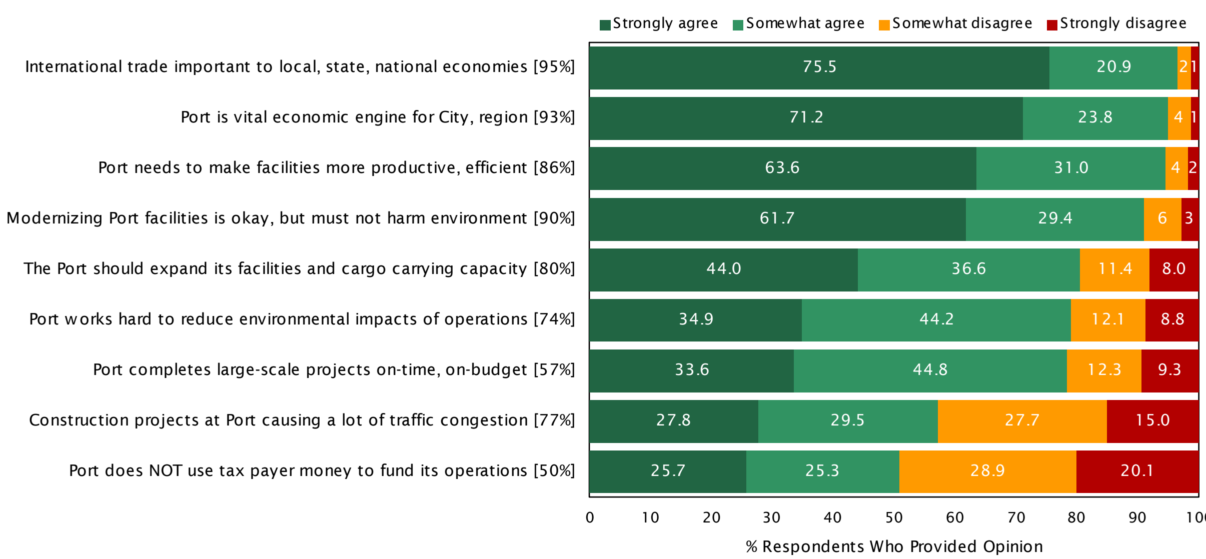
Information & Attitudes

The next question in the survey was designed to profile voters' opinions about the Port and a variety of issues that are related to and/or affect Port operations. The structure of Question 22 was straightforward: for each of the statements shown in truncated form on the left of Figure 54, respondents were simply asked the extent to which they agreed or disagreed with each statement. The statements are sorted from high to low in the figure based on the percentage of respondents who agreed (strongly or somewhat) with the statement. To allow for an apples-to-apples comparison of responses, only respondents who provided an opinion (either agree or disagree) were included in Figure 54. Those who did not have an opinion were removed from this analysis. The percentage who offered an opinion and were included in this analysis is shown in brackets to the right of each statement label.

Virtually all Long Beach voters with an opinion agreed that *international trade is important to our local, state and national economies* (96%), that *the Port of Long Beach is a vital economic engine for Long Beach and the Southern California region, being responsible for the creation of jobs and economic prosperity* (95%), that in *order to stay competitive in the global economy and avoid losing business and jobs, the Port needs to make its facilities more productive and efficient* (95%), and that *modernizing Port facilities to accommodate increased cargo is OK provided that it does not harm the environment* (91%). At least three-quarters of Long Beach voters with an opinion also agreed that *To keep up with demand and remain competitive in the global economy, the Port should expand its facilities and cargo carrying capacity* (81%), *the Port of Long Beach is working hard to reduce the negative environmental impacts of shipping and cargo operations* (79%), and *The Port of Long Beach does a good job managing large-scale construction projects, completing them on-time and on-budget* (78%).

Question 22 *Next, I'm going to read you a series of statements. For each, I'd like you to tell me whether you agree or disagree with the statement. Here is the (first/next) one: _____. Do you agree or disagree, or do you have no opinion?*

FIGURE 54 AGREEMENT WITH STATEMENTS ABOUT PORT OF LONG BEACH



When compared to the other statements tested, fewer Long Beach voters agreed that *The Port of Long Beach does not use tax payer money to fund its operations* (51%) and *Construction projects at the Port are causing a lot of traffic congestion in Long Beach* (57%).

Table 11 shows how agreement levels for each statement have varied over the past eight years, as well as the change in agreement between 2013 and 2015 (far right column). When compared to 2013, three statements received significantly lower levels of agreement.

TABLE 11 AGREEMENT WITH STATEMENTS ABOUT PORT OF LONG BEACH BY STUDY YEAR

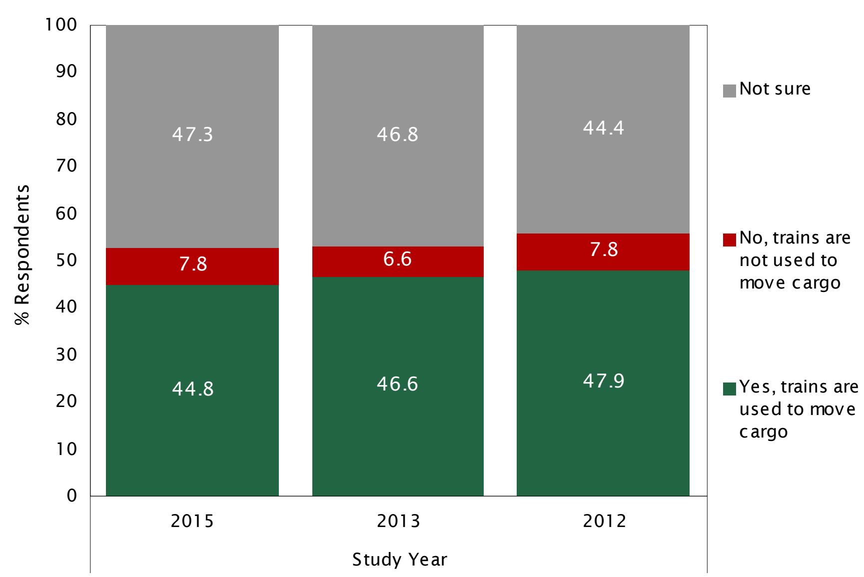
	Study Year							Change in Agreement
	2015	2013	2012	2011	2009	2008	2007	2013 to 2015
Construction projects at Port causing a lot of traffic congestion	57.3	54.8	N/A	N/A	N/A	N/A	N/A	+2.5
The Port should expand its facilities and cargo carrying capacity	80.6	80.0	81.2	73.8	N/A	N/A	N/A	+0.6
Port needs to make facilities more productive, efficient	94.6	95.2	95.3	93.6	96.1	93.0	95.7	-0.6
International trade important to local, state, national economies	96.4	97.1	96.0	96.2	96.7	96.4	96.2	-0.6
Port is vital economic engine for City, region	95.0	95.7	95.5	95.6	96.2	94.7	95.1	-0.7
Port completes large-scale projects on-time, on-budget	78.4	79.8	N/A	N/A	N/A	N/A	N/A	-1.4
Modernizing Port facilities is okay, but must not harm environment	91.1	94.0	92.3	91.6	92.2	88.8	91.3	-2.9†
Port works hard to reduce environmental impacts of operations	79.1	85.8	86.6	84.4	88.7	76.0	76.4	-6.7†
Port does NOT use tax payer money to fund its operations	51.0	60.1	N/A	N/A	N/A	N/A	N/A	-9.2†

† Statistically significant change ($p < 0.05$) between the 2013 and 2015 studies.

TRAINS New to the 2012 study and repeated again in 2013 and 2015, the survey sought to gauge voters' understanding of how cargo is moved at the Port. Specifically, voters were asked whether they know if trains are used to move cargo at the Port of Long Beach.

Question 23 *To the best of your knowledge, are trains used to move cargo at the Port of Long Beach, or are you not sure?*

FIGURE 55 BELIEVE THAT TRAINS ARE USED TO MOVE CARGO BY STUDY YEAR



Overall, less than half of Long Beach voters (45%) knew that trains are used to move cargo at the Port of Long Beach (Figure 55). The remaining respondents were either unsure (47%) or held the incorrect understanding that trains are not used to move cargo at the Port (8%). When compared to their respective counterparts, those who had lived in Long Beach at least five years, and those who recalled exposure to Port-related information, receiving the Port newsletter and/or had visited the Port's website in the past year were the most likely to know that trains are used to move cargo at the Port (see Figures 56 & 57).

FIGURE 56 BELIEVE THAT TRAINS ARE USED TO MOVE CARGO BY YEARS IN LONG BEACH, ENCOUNTERED PORT INFO IN PAST YEAR, HOUSEHOLD RECEIVED PORT NEWSLETTER & VISITED PORT OF LONG BEACH WEBSITE

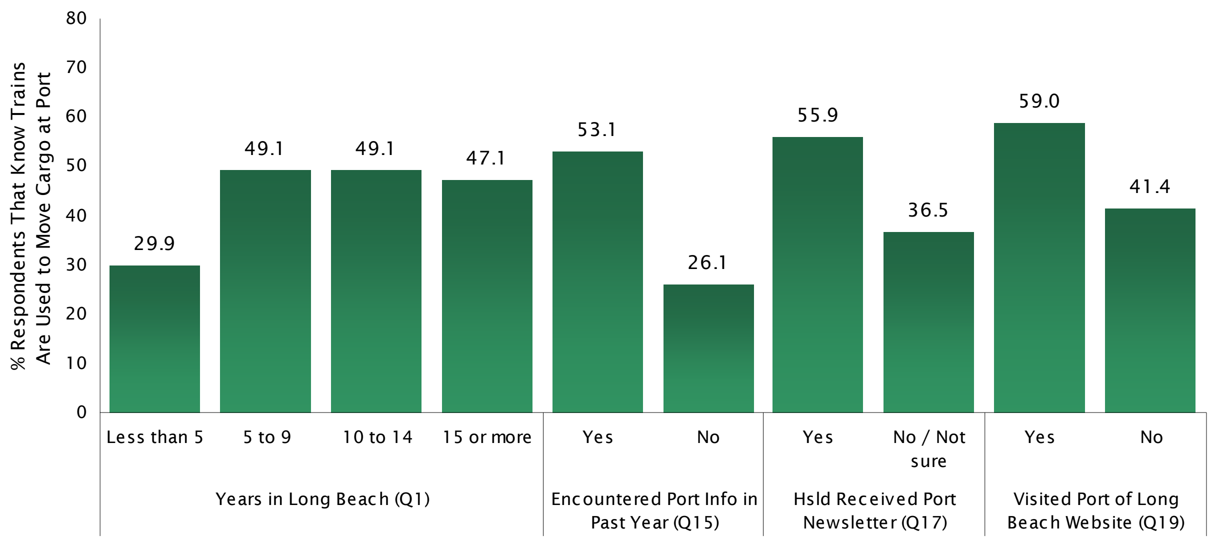
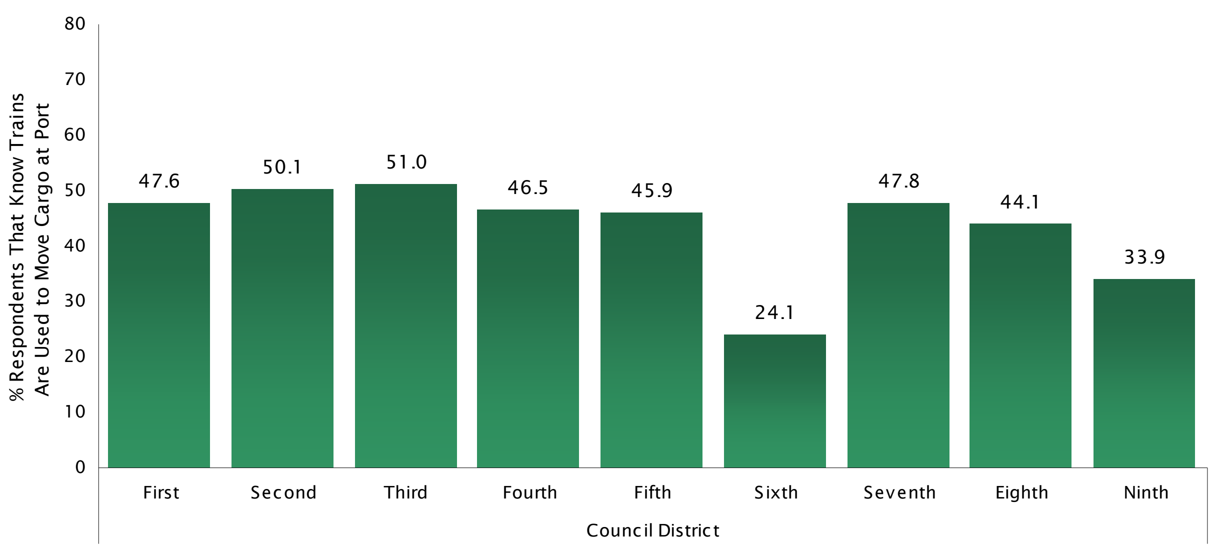


FIGURE 57 BELIEVE THAT TRAINS ARE USED TO MOVE CARGO BY COUNCIL DISTRICT



HARBOR TOURS The Port of Long Beach offers residents free tours of the harbor. The 2015 survey inquired as to whether respondents were aware of the free tours and—if yes—if they had ever taken a tour. Figure 58 combines the answers to both questions.

Overall, 35% of voters surveyed indicated that—prior to taking the survey—they were aware that the Port of Long Beach offers free tours of the harbor. Among all respondents, 12% indicated that they had taken a free harbor tour offered by the Port in the past. When compared to 2013, the percentage who were *not* aware the Port offers free tours of the harbor increased significantly (+8%), whereas the percentage who stated they had not taken a harbor tour decreased significantly (-6%) (see Table 12). Figures 59-61 display how awareness and prior tour experiences varied by subgroups in Long Beach.

Question 24 *Prior to taking this survey, were you aware that the Port offers free tours of the harbor?*

Question 25 *Have you ever taken the free harbor tour offered by the Port?*

FIGURE 58 AWARENESS AND USE OF FREE PORT TOURS

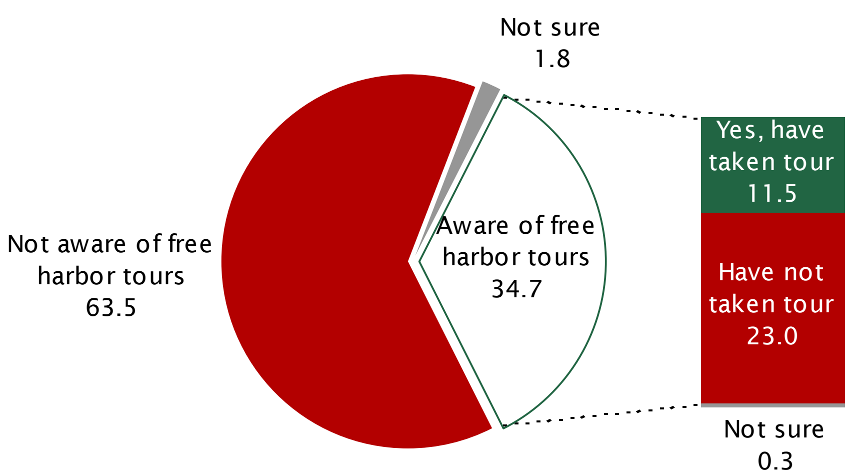


TABLE 12 AWARENESS AND USE OF FREE PORT TOURS STUDY YEAR

	Study Year 2015	2013	2012	Change in Agreement 2013 to 2015
Not aware of free harbor tours	63.5	55.4	55.6	+8.1†
Not sure about free harbor tours	1.8	1.5	1.7	+0.3
Yes, have taken tour	11.5	13.6	16.0	-2.1
Have not taken tour	23.0	28.9	26.5	-6.0†
Not sure if harbor tour taken	0.3	0.5	0.2	-0.2

† Statistically significant change ($p < 0.05$) between the 2013 and 2015 studies.

FIGURE 59 AWARENESS AND USE OF FREE PORT TOURS BY YEARS IN LONG BEACH, CHILDREN UNDER 10 IN HOUSEHOLD, CHILDREN 10 TO 18 IN HOUSEHOLD & HOUSEHOLD RECEIVED PORT NEWSLETTER

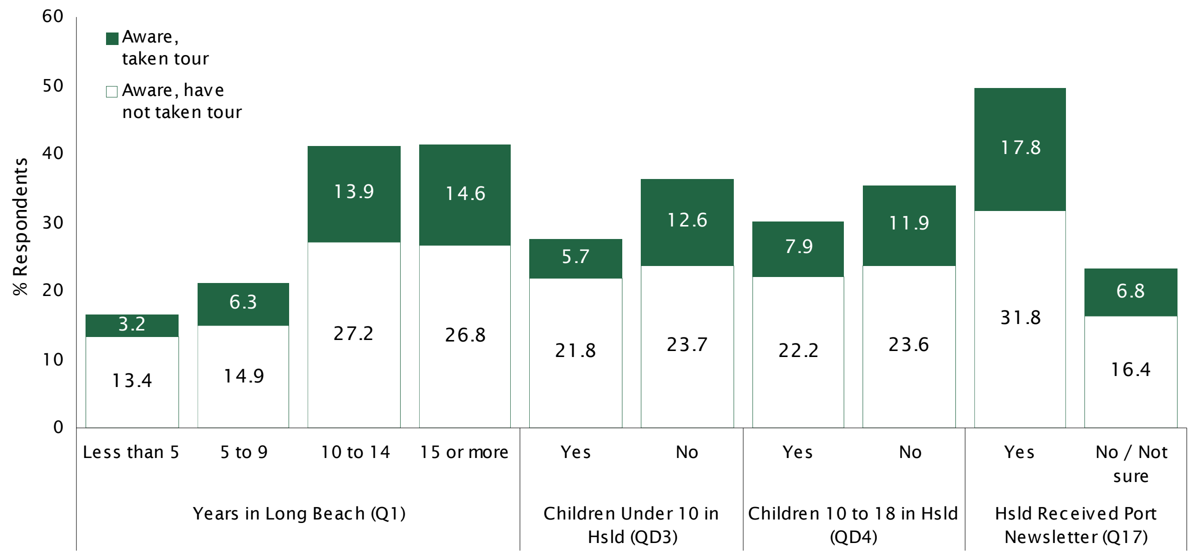


FIGURE 60 AWARENESS AND USE OF FREE PORT TOURS BY HOUSEHOLD INCOME & AGE

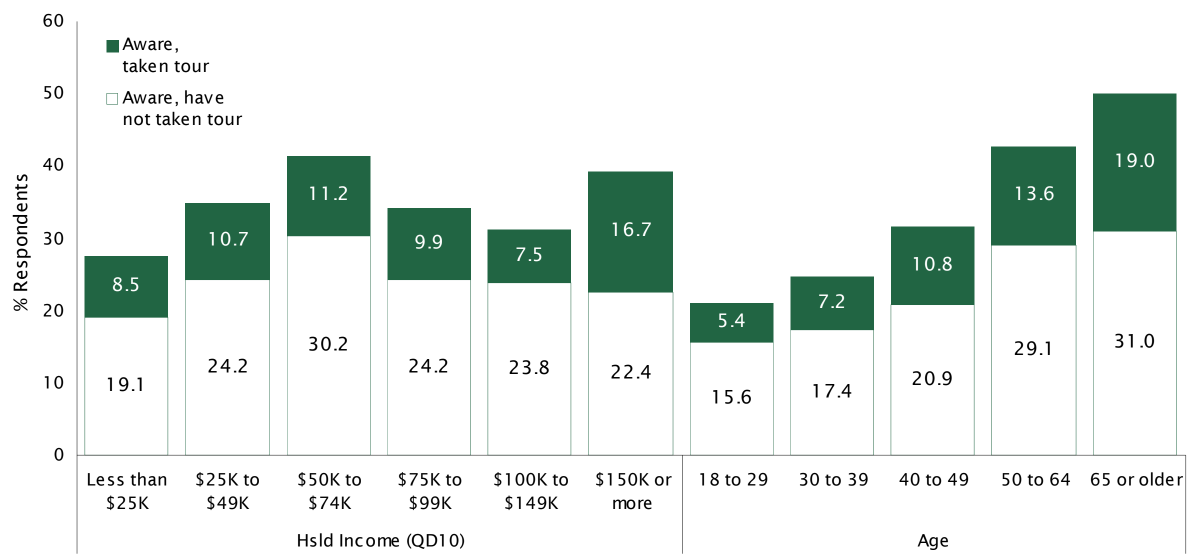
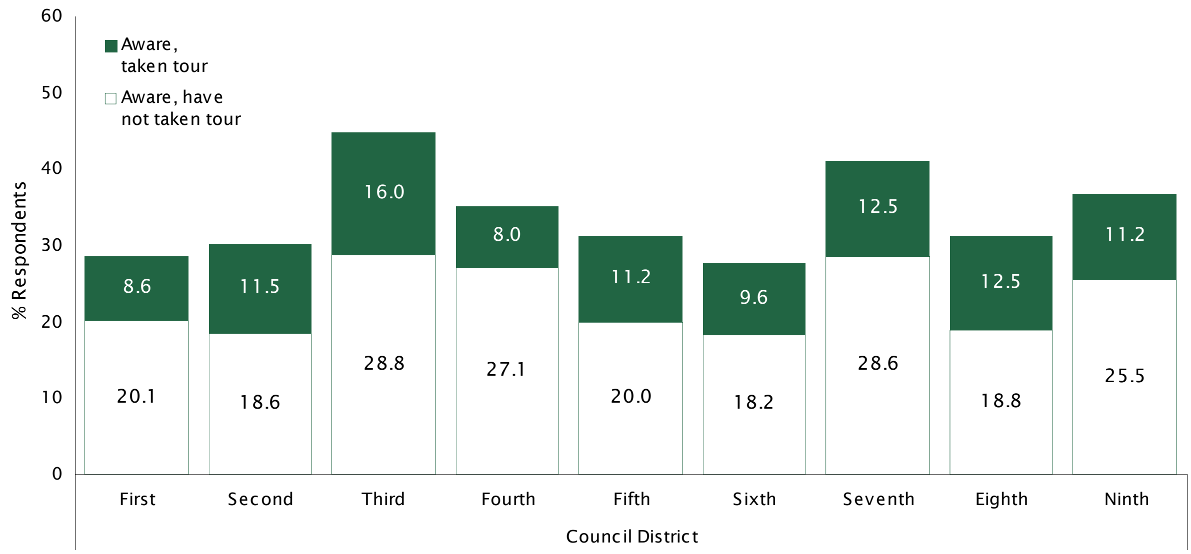


FIGURE 61 AWARENESS AND USE OF FREE PORT TOURS BY COUNCIL DISTRICT



Follow-Up Opinion of Port

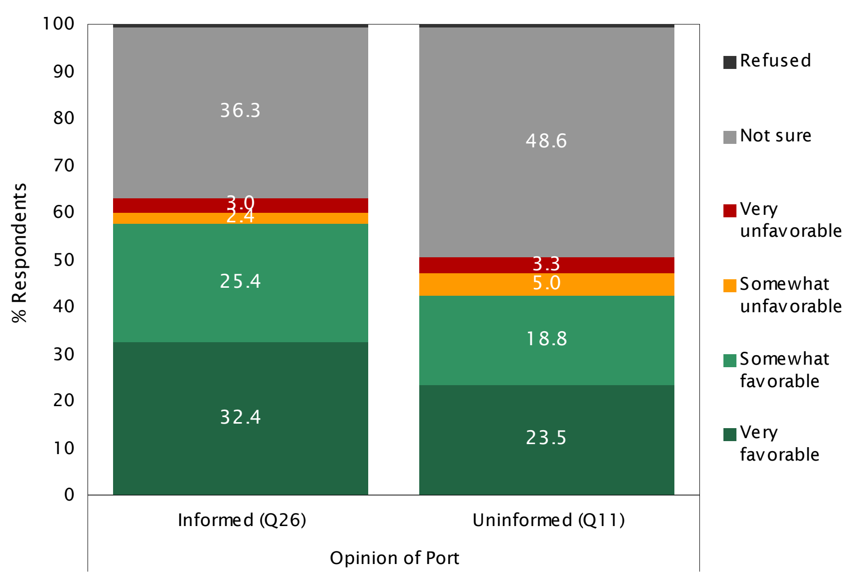
Earlier in the survey, voters were asked whether they had a favorable or unfavorable opinion of the Port of Long Beach (see *Favorability* on page 25). Purposely timed to be early in the survey, the favorability ratings captured in Question 11 represent the *natural* favorability ratings for the Port. That is, they represent voters' current opinions about the Port given the level of information they had at the outset of the interview. And, as was the case in prior years, a sizeable percentage of voters (49%) indicated that they did not have an opinion about the Port—good or bad.

Anticipating that this would be the case, one of the goals of the 2015 survey was to gauge how, as voters learn more about the Port and its operations, their opinions of the Port may change. Accordingly, having exposed respondents to additional information about the Port throughout the course of the interview, Question 26 returned to the topic and asked voters—now that they had heard a bit more about the Port—whether they had a favorable or unfavorable opinion of the agency.

Figure 62 presents the results of this question as well as the initial test of favorability (Question 11), asked earlier in the survey. As shown in the figure, more than half (58%) of voters held a favorable opinion of the Port at this point in the survey, which is an increase of 16 percentage points from the *natural* levels recorded at Question 11. The percentage of voters who did not have an opinion dropped from 49% to 36%, while the percentage of those with an unfavorable opinion declined to 5%.

Question 26 *Now that you have heard a bit more about the Port of Long Beach, let me ask you again: In general, do you have a favorable or unfavorable opinion of the Port of Long Beach - or do you not have an opinion either way?*

FIGURE 62 INFORMED OPINION OF PORT OF LONG BEACH



Figures 63 through 66 display the percentage *increase* in favorable opinions of the Port between Question 11 (uninformed opinion of the Port) and Question 26 (informed opinion of the Port) by a variety of key demographic variables. Demographic subgroups with the largest increases in favorable opinions included those who had been residents between five and nine years, moderate environmentalists, those with no friends or family employed at the Port, voters with vocational/tech and four-year college degrees, 'other' ethnicities, those in households with annual incomes between $75,000 and $99,999, residents between the age of 30 and 39, and those in the Sixth Council District.

FIGURE 63 INCREASE IN FAVORABLE OPINION OF PORT OF LONG BEACH BY YEARS IN LONG BEACH, ENCOUNTERED PORT INFO IN PAST YEAR, ENVIRONMENTALIST & FRIENDS, FAMILY EMPLOYED AT PORT

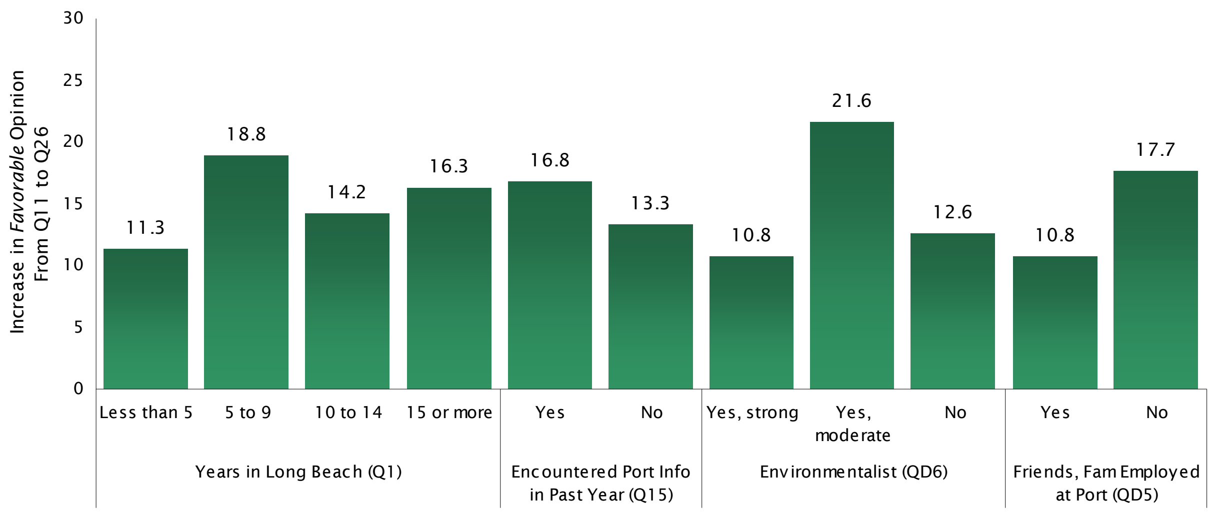


FIGURE 64 INCREASE IN FAVORABLE OPINION OF PORT OF LONG BEACH BY EDUCATION LEVEL, ETHNICITY & GENDER

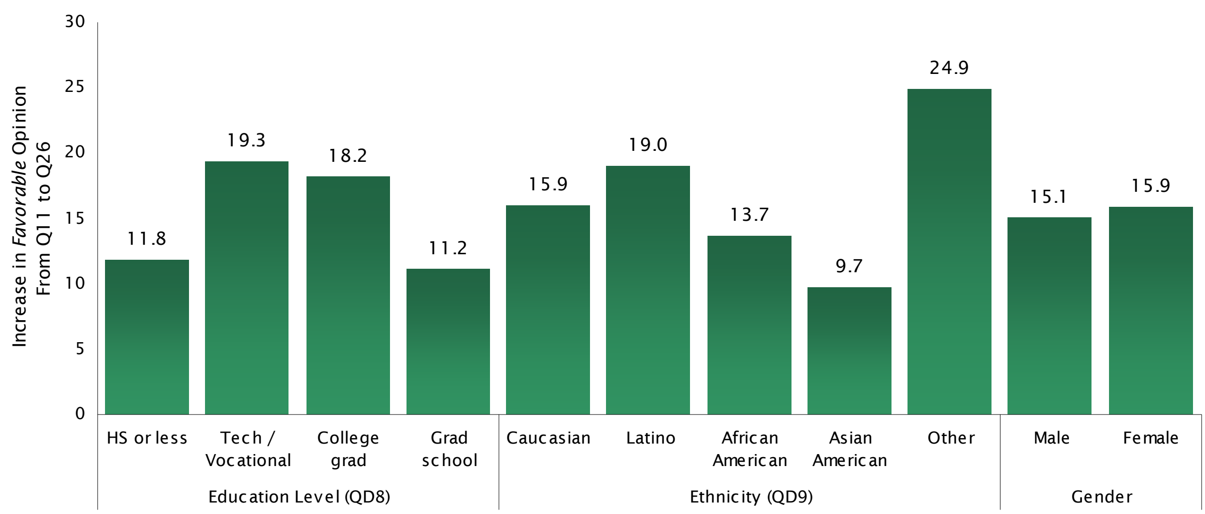


FIGURE 65 INCREASE IN FAVORABLE OPINION OF PORT OF LONG BEACH BY HOUSEHOLD INCOME & AGE

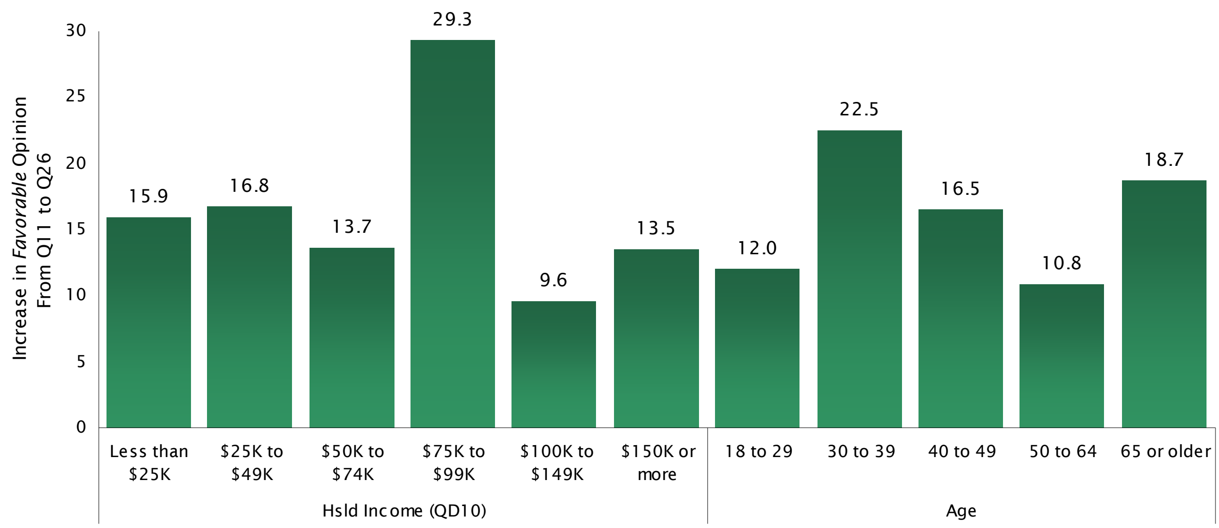
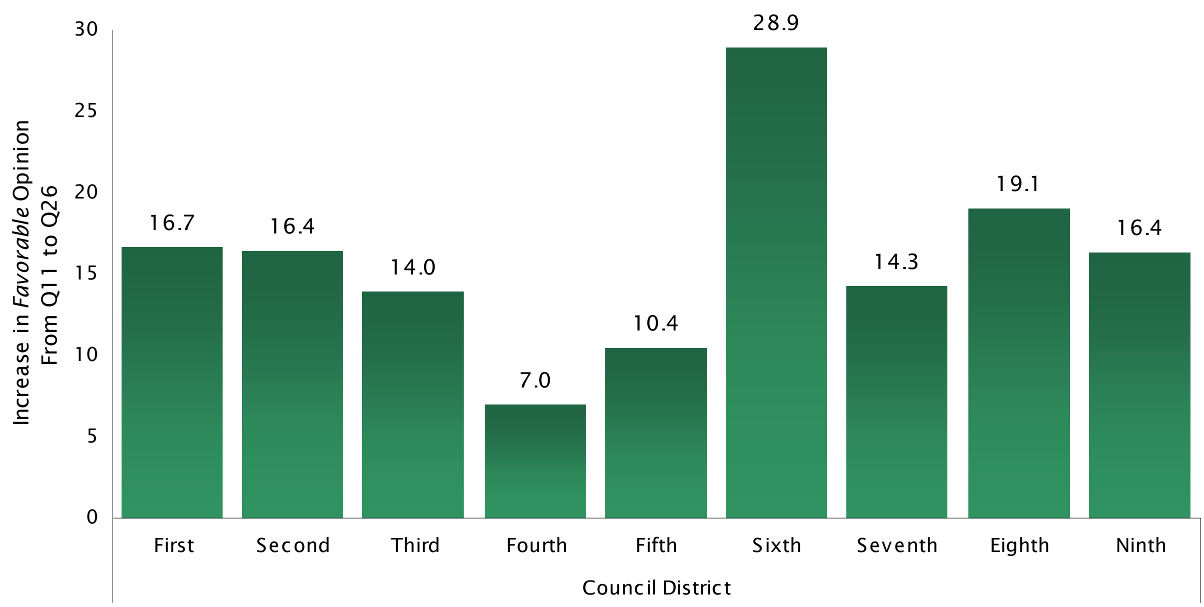


FIGURE 66 INCREASE IN FAVORABLE OPINION OF PORT OF LONG BEACH BY COUNCIL DISTRICT



BACKGROUND & DEMOGRAPHICS

TABLE 13 DEMOGRAPHICS OF SAMPLE BY STUDY YEAR

	Study Year						
	2015	2013	2012	2011	2009	2008	2007
Total Respondents	*1000*	*1000*	*1000*	*1000*	*1000*	*1000*	*1000*
Q1 Years in Long Beach	%	%	%	%	%	%	%
Less than 5	16.2	14.6	10.9	5.7	8.7	16.3	15.3
5 to 9	13.8	12.6	16.6	10.5	14.3	16.4	14.5
10 to 14	13.4	11.7	14.6	16.3	12.2	10.4	11.5
15 or more	56.3	60.9	57.3	66.9	64.4	56.8	58.0
Refused	0.3	0.1	0.6	0.5	0.4	0.1	0.7
QD1 Home ownership status							
Own	41.3	50.4	53.7	60.2	59.8	58.6	59.8
Rent	50.7	41.7	39.4	32.0	32.9	36.4	33.2
Live with family, friends	3.1	4.7	5.1	5.6	6.5	3.0	5.1
Refused	4.9	3.2	1.9	2.1	0.8	1.9	1.8
QD3 Children under 10 in hsld							
Yes	18.0	20.8	20.9	22.6	26.7	24.0	23.4
No	77.8	77.6	77.1	75.3	72.4	74.2	75.2
Refused	4.2	1.6	2.1	2.1	0.9	1.9	1.3
QD4 Children between 10 and 18 in hsld							
Yes	13.8	20.6	20.9	27.9	26.7	22.8	23.5
No	82.0	77.5	77.2	70.0	72.3	75.0	75.1
Refused	4.2	1.9	1.9	2.1	1.0	2.2	1.4
QD7 Employment status							
Full-time	48.2	45.4	48.7	41.5	45.7	49.6	51.3
Part-time	10.4	9.5	8.2	10.7	8.5	11.7	8.7
Student	6.9	10.6	8.5	10.3	9.5	7.5	7.9
Homemaker	3.0	4.2	3.7	4.1	5.0	5.4	6.1
Retired	19.5	19.7	19.9	21.0	21.3	18.2	19.9
Between jobs	4.7	7.1	7.9	9.2	7.8	3.7	4.0
Refused	7.4	3.5	3.0	3.2	2.3	3.9	2.2
QD8 Education level							
Elementary	0.6	0.5	0.3	0.3	0.9	0.6	0.7
Some HS	2.8	2.2	2.0	2.2	2.9	2.6	2.7
HS grad	15.2	16.3	14.2	18.3	19.1	17.1	17.7
Tech / Vocational	2.5	1.4	1.0	2.7	2.3	1.9	1.6
Some college	24.1	28.0	28.0	23.6	24.1	25.8	25.3
College grad	29.1	27.6	28.7	28.5	28.1	28.9	24.6
Some grad school	1.8	3.3	3.6	2.7	3.2	2.4	4.7
Grad degree	18.4	19.1	19.9	19.8	18.1	18.4	20.9
Refused	5.3	1.6	2.2	1.7	1.3	2.2	1.7
QD9 Ethnicity							
Caucasian	42.2	48.0	50.8	48.4	53.0	51.0	55.2
Latino	20.4	19.3	19.1	16.6	18.8	16.1	13.5
African American	17.1	13.2	15.4	16.0	13.1	13.3	13.7
American Indian	0.6	1.3	0.9	0.5	0.7	1.3	1.0
Asian American	7.0	6.5	4.2	6.4	3.9	6.5	4.3
Pacific Islander	0.5	0.7	0.2	0.4	0.7	1.6	0.7
Mixed / Other	6.0	7.2	5.0	5.4	5.4	5.0	6.0
Refused	6.3	3.8	4.4	6.3	4.4	5.2	5.6
QD10 Hsld income							
Less than $25K	18.2	17.5	13.6	14.4	13.8	11.7	13.7
$25K to $49K	14.7	19.7	18.9	19.9	18.2	17.1	17.7
$50K to $74K	14.3	16.1	16.3	15.4	17.9	18.5	16.8
$75K to $99K	13.0	14.1	14.4	12.5	13.9	13.5	14.6
$100K to $149K	11.9	12.2	15.3	14.1	13.8	14.1	13.4
$150K to $199K	4.9	5.5	3.8	4.1	4.3	5.6	4.2
$200K or more	4.0	4.1	4.4	3.7	4.4	3.6	4.8
Not sure / Refused	19.0	10.7	13.3	15.9	13.8	15.9	14.7
Gender							
Male	49.7	48.9	48.1	47.2	43.8	45.6	46.5
Female	50.3	51.1	51.9	52.8	56.2	54.4	53.5
Party							
Democrat	53.8	52.1	50.8	48.4	50.9	50.4	48.7
Republican	14.6	20.2	22.2	25.3	27.1	26.9	28.1
Other / DTS	31.5	27.7	27.0	26.3	22.0	22.7	23.1
Age							
18 to 29	20.3	22.2	21.1	22.5	18.3	20.2	20.1
30 to 39	20.1	19.0	18.1	17.7	17.6	17.7	17.9
40 to 49	17.0	17.3	18.0	18.8	19.9	19.2	19.7
50 to 64	24.8	24.4	25.1	24.5	26.5	24.9	24.5
65 or older	15.9	14.9	15.1	13.4	14.1	13.7	12.7
Refused	2.0	2.3	2.6	3.0	3.5	4.1	5.1
Council District							
First	10.2	8.6	8.4	7.1	6.2	7.4	7.8
Second	16.1	13.3	12.4	8.8	10.4	11.0	11.4
Third	13.8	16.9	15.2	15.1	16.6	16.7	19.4
Fourth	10.8	10.4	10.5	11.2	9.7	10.5	10.8
Fifth	10.7	14.4	15.5	17.4	19.4	19.3	21.2
Sixth	8.1	7.4	6.9	7.4	6.6	6.4	5.1
Seventh	11.7	10.5	11.6	10.6	11.0	9.3	8.0
Eighth	10.7	10.2	10.5	11.7	10.2	10.1	8.5
Ninth	8.0	8.3	8.9	10.8	9.8	9.3	7.8

Table 13 presents the key demographic and background information that was either collected during the survey or available on the sample voter file. Because of the probability-based sampling methodology used in creating the sample, the results shown are representative of the universe of adults within the City who are registered to vote.

Although the primary motivation for collecting the background and demographic information was to provide a better insight into how the results of the substantive questions of the survey vary by demographic characteristics (see crosstabulations in Appendix A for a full breakdown of each question), the information is also valuable for understanding the current profile of the City's electorate.

METHODOLOGY

The following sections outline the methodology used in the study, as well as the motivation for using certain techniques.

QUESTIONNAIRE DEVELOPMENT Dr. McLarney of True North Research worked closely with the Port of Long Beach to develop a questionnaire that covered the topics of interest and avoided the many possible sources of systematic measurement error, including position-order effects, wording effects, response-category effects, scaling effects and priming. Several questions included multiple individual items. Because asking the items in a set order can lead to a systematic position bias in responses, the items were asked in a random order for each respondent. Some of the questions asked in this study were presented only to a subset of respondents. The questionnaire included with this report (see *Questionnaire & Toplines* on page 60) identifies the skip patterns that were used during the interview to ensure that each respondent received the appropriate questions.

Nearly all questions asked in the 2015 survey were purposely tracked directly from the 2007 through 2013 surveys to allow the Port to track its performance over time.

PROGRAMMING & PRE-TEST Prior to fielding the survey, the questionnaire was CATI (Computer Assisted Telephone Interviewing) programmed to assist the live interviewers when conducting the telephone interviews. The CATI program automatically navigates the skip patterns, randomizes the appropriate question items, and alerts the interviewer to certain types of keypunching mistakes should they happen during the interview. The survey was also programmed into a password-protected online survey application to allow respondents the option of participating via the web, if preferred. The integrity of the questionnaire was pre-tested internally by True North and by dialing into random homes in the City of Long Beach prior to formally beginning the survey.

SAMPLE The survey was conducted using a stratified sample of 1,000 individuals drawn from the universe of registered voters in the City of Long Beach. Consistent with the profile of this universe, the sample was stratified and a total of 1,000 clusters were defined, each representing a particular combination of age, gender, partisanship, household party type, and location within the City. Individuals were then randomly selected based on their profile into an appropriate cluster. This method ensures that if a person of a particular profile refuses to participate in the study, they are replaced by an individual who shares their same profile. It also ensures that the final sample closely mirrors the demographic profile of the universe of registered voters in the City and can be analyzed on a geographic basis.

MARGIN OF ERROR DUE TO SAMPLING By using a stratified and clustered sample and monitoring the sample characteristics as data collection proceeded, True North ensured that the sample was representative of registered voters in the City of Long Beach. The results of the sample can thus be used to estimate the opinions of *all* registered voters in the City. Because not every voter in the City participated in the survey, however, the results have what is known as a statistical margin of error due to sampling. The margin of error refers to the difference between what was found in the survey of 1,000 voters for a particular question and what would have been found if all of the estimated 254,909 voters in the City had been interviewed.

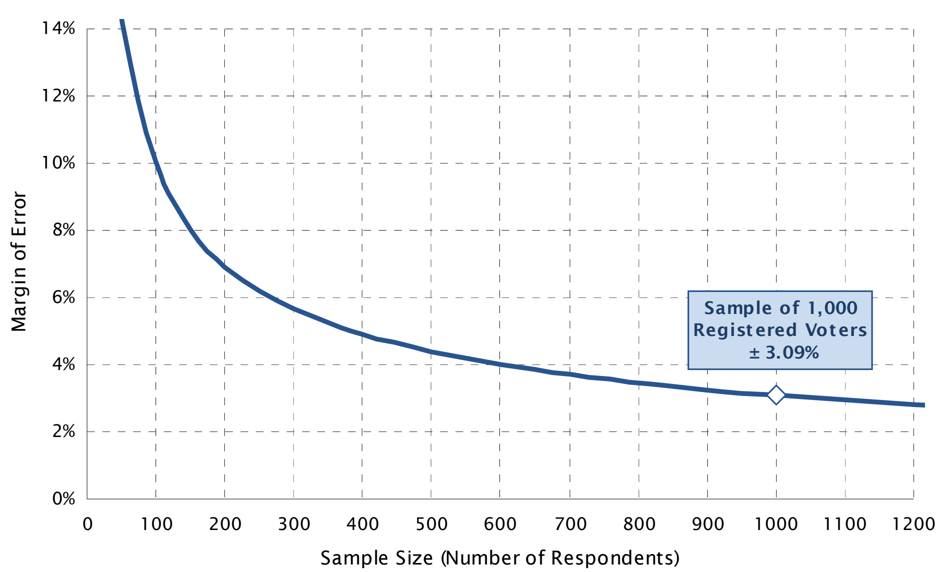
For example, in estimating the percentage of voters who have visited the Port's website in the past year (Question 20), the margin of error can be calculated if one knows the size of the population, the size of the sample, a desired confidence level, and the distribution of responses to the question. The appropriate equation for estimating the margin of error, in this case, is shown below:

$$\hat{p} \pm t\sqrt{\left(\frac{N-n}{N}\right)\frac{\hat{p}(1-\hat{p})}{n-1}}$$

where $\hat{p}$ is the proportion of survey respondents who had visited the Port's website in the past year (0.19 for 19% in this example), N is the population size of all voters (254,909), n is the sample size that received the question (1,000), and t is the upper $\alpha/2$ point for the t-distribution with $n-1$ degrees of freedom (1.96 for a 95% confidence interval). Solving the equation using these values reveals a margin of error of ± 2.43%. This means that with 19% of survey respondents indicating they had visited the Port's website in the past year, we can be 95% confident that the actual percentage of all voters who visited the website during this time period is between 17% and 21%.

Figure 67 provides a plot of the *maximum* margin of error in this study. The maximum margin of error for a dichotomous percentage result occurs when the answers are evenly split such that 50% provide one response and 50% provide the alternative response (i.e., $\hat{p}$ = 0.5). For this survey, the maximum margin of error is ± 3.09% for questions answered by all 1,000 respondents.

FIGURE 67 MAXIMUM MARGIN OF ERROR



Within this report, figures and tables show how responses to certain questions varied by demographic and geographic characteristics such as age of the respondent and Council District. Figure 67 is thus useful for understanding how the maximum margin of error for a percentage estimate will grow as the number of individuals asked a question (or in a particular subgroup) shrinks. Because the margin of error grows exponentially as the sample size decreases, the reader should use caution when generalizing and interpreting the results for small subgroups.

DATA COLLECTION The primary method of data collection for this study was telephone interviewing. Interviews were conducted during weekday evenings (5:30PM to 9PM) and on weekends (10AM to 5PM) between February 10 and February 21, 2015. It is standard practice not to call during the day on weekdays because most working adults are unavailable and thus calling during those hours would bias the sample. Telephone interviews averaged 18 minutes in length.

Respondents who preferred to participate online were allowed to do so at their convenience via a secure website hosted by True North. Each respondent who preferred to participate online was given a unique password that could be used only once.

DATA PROCESSING Data processing consisted of checking the data for errors or inconsistencies, coding and recoding responses, categorizing verbatim responses, and preparing frequency analyses and crosstabulations. Where appropriate, tests of statistical significance were conducted to evaluate whether a change in responses between the 2013 and 2015 studies was due to an actual change in opinions or was likely an artifact of independently drawn, random cross-sectional samples.

ROUNDING Numbers that end in 0.5 or higher are rounded up to the nearest whole number, whereas numbers that end in 0.4 or lower are rounded down to the nearest whole number. These same rounding rules are also applied, when needed, to arrive at numbers that include a decimal place in constructing figures and charts. Occasionally, these rounding rules lead to small discrepancies in the first decimal place when comparing tables and pie charts for a given question.

TRUE NORTH RESEARCH

Long Beach Port
Community Survey version
Final Toplines
February 2015

Section 1: Introduction to Study

Hi, may I please speak to _____. Hi, my name is _____ and I'm calling on behalf of TNR, a public opinion research firm. We're conducting a survey of voters about important issues in Long Beach and I'd like to get your opinions.

If needed: This is a survey about important issues in Long Beach – I'm NOT trying to sell anything and I won't ask for a donation.
If needed: The survey should take about 12 minutes to complete.
If needed: If now is not a convenient time, can you let me know a better time so I can call back?

If the person asks why you need to speak to the listed person or if they ask to participate instead, explain: For statistical purposes, this survey must only be completed by this particular individual.

If the person says they are an elected official or is somehow associated with the survey, politely explain that this survey is designed to the measure the opinions of those not closely associated with the study, thank them for their time, and terminate the interview.

Section 2: Quality of Life & Issues

I'd like to begin by asking you a few questions about what it is like to live in the City of Long Beach.

Q1	How long have you lived in Long Beach?		
	1	Less than 1 year	3%
	2	1 to 4 years	13%
	3	5 to 9 years	14%
	4	10 to 14 years	13%
	5	15 years or longer	56%
	99	Not sure / Refused	0%
Q2	How would you rate the overall quality of life in the City? Would you say it is excellent, good, fair, poor or very poor?		
	1	Excellent	26%
	2	Good	52%
	3	Fair	18%
	4	Poor	2%
	5	Very Poor	1%
	98	Not sure	0%
	99	Refused	0%

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Q3	If the government could change one thing to make Long Beach a better place to live now and in the future, what change would you like to see? Verbatim responses recorded and later grouped into categories shown below.	
	Not sure / Cannot think of anything	20%
	Improve police, public safety	10%
	Improve parking	7%
	Improve local economy, job opportunities	6%
	Address homeless issue	6%
	Improve, repair streets, roads	6%
	Reduce cost of housing	5%
	Reduce pollution / Improve environmental efforts	5%
	Clean up, beauty City	5%
	Improve quality of education	5%
	Improve, add recreational areas	4%
	Reduce taxes, fees, cost of living	3%
	Remove, modify breakwater	2%
	Address gang issue	2%
	Maintain, repair infrastructure (general)	2%
	Improve government leadership, process	2%
	Improve public transportation	2%
	Reduce traffic congestion	2%
	Establish rent control	2%
	No changes / Everything is okay	1%
	Improve downtown area, entertainment options	1%
	Control, plan growth	1%
	Improve City-resident communication	1%
	Address illegal immigration issue	1%
	Repair, improve sidewalks	1%
	Improve government spending, budgeting	1%
	Address healthcare issues	1%
	Improve, enforce local ordinances	1%
	Improve public programs, services (general)	1%
	Improve neighborhoods, community gatherings	1%
	Improve street lighting	1%

Q4	Next, I'm going to read a list of issues facing Long Beach and for each one, please tell me how important you feel the issue is to you, using a scale of extremely important, very important, somewhat important or not at all important. Here is the (first/next) issue: ______. Do you think this issue is extremely important, very important, somewhat important, or not at all important?						
	Randomize	Extremely Important	Very Important	Somewhat Important	Not at all Important	Not sure	Refused
A	Creating good paying, local jobs	42%	44%	11%	1%	1%	1%
B	Protecting the environment	44%	40%	13%	2%	0%	0%
C	Reducing traffic congestion	22%	36%	35%	6%	2%	0%
D	Improving education	53%	34%	9%	2%	1%	0%
E	Making sure our shipping ports are safe and secure	41%	42%	13%	2%	1%	0%
F	Protecting and improving the local economy	40%	47%	10%	1%	1%	0%
G	Improving public safety	41%	43%	13%	2%	1%	0%

Section 2: General Information Sources

Q5	Which of the following would you say is your **primary** source for information about news and events in the City of Long Beach? Newspapers, television, radio, or the Internet?		
	1	Newspapers	24%
	2	Television	25%
	3	Radio	3%
	4	Internet	46%
	5	None/Don't pay attention to news and events in City of Long Beach	2%
	98	Not sure	1%
	99	Refused	0%

Q6	As I read the following list of information sources, I'd like to know how often you use each source. For each that I read, please indicate whether you use it every week, 2 to 3 times per month, once per month, or less often than once per month. If you never use this information source, just say so.						
	Randomize	Every Week	2 to 3 Times per Month	Once per month	Less than once per month	Never Use	Refused
A	Los Angeles Times	26%	12%	13%	7%	43%	1%
B	Long Beach **Press Telegram**	32%	11%	13%	9%	34%	1%
D	Downtown and Grunion (Grun-yun) Gazettes	17%	10%	14%	9%	48%	2%

E	Orange County Register	5%	4%	11%	9%	70%	1%
F	Television News	65%	9%	6%	4%	16%	1%
G	Radio News	44%	8%	7%	5%	34%	1%
H	Google or Yahoo	64%	8%	6%	2%	19%	1%
I	YouTube	34%	11%	12%	5%	38%	1%
J	Facebook	45%	6%	4%	4%	39%	1%
K	LBpost.com website	10%	6%	8%	6%	68%	2%
L	Long Beach Business Journal	4%	5%	12%	7%	70%	2%

Only ask Q7 for items A, B, D, E where Q6 = 1 OR for item L where Q6 = (1,2,3).

Q7	Do you primarily read the: _____ in print or online?				
	Randomize	Print	Online	Both	Refused
A	Los Angeles Times	55%	39%	5%	1%
B	Long Beach Press Telegram	69%	25%	6%	1%
D	Downtown and Grunion (Grun-yun) Gazettes	81%	12%	4%	3%
E	Orange County Register	58%	33%	6%	3%
F	Long Beach Business Journal	63%	29%	4%	4%

Q8	Which do you use most often to access information online – a computer, a smart phone, or a tablet?	
1	Computer	43%
2	Smart Phone	36%
3	Tablet	10%
4	Don't go online	7%
98	Not sure	3%
99	Refused	0%

Section 4: Perceptions of Port

Q9	Prior to taking this survey, had you ever heard of the Port of Long Beach?		
1	Yes	96%	*Ask Q10*
2	No	4%	*Skip to Q11*
99	Refused	0%	*Skip to Q11*

Q10	Briefly and in your own words, how would you describe the Port of Long Beach? Verbatim responses recorded and later grouped into categories shown below.	
	Good for economy / Revenue source	17%
	Not sure / Only heard of it	13%
	Size / One of largest ports	12%
	Busy, full of activity	12%
	General positive comment	9%
	Importing / Exporting	8%
	Important for City, region	7%
	Provides local jobs	7%
	Polluted / Environmental concerns	6%
	Shipping industry	6%
	Congested / Traffic	5%
	Well managed, operated	4%
	Beautiful / Scenic	4%
	Poorly managed, operated	4%
	General negative comment	4%
	Recently improved, redeveloped	3%
	Clean / Environmentally conscious	3%
	Union issues	2%
	Safe / Secure	1%
	In need of improvement, renovations	1%
	Dangerous, unsafe area	1%

Q11	To clarify, the Port of Long Beach is a public agency responsible for managing the shipping terminals, commerce and navigation in the City's Harbor District. In general, do you have a favorable or unfavorable opinion of the Port of Long Beach – or do you not have an opinion either way? *If favorable or unfavorable, ask:* Would that be very (favorable/unfavorable) or somewhat (favorable/unfavorable)?			
	1	Very favorable	23%	*Skip to Q13*
	2	Somewhat favorable	19%	*Skip to Q13*
	3	Somewhat unfavorable	5%	*Ask Q12*
	4	Very unfavorable	3%	*Ask Q12*
	98	No opinion	49%	*Skip to Q13*
	99	Refused	1%	*Skip to Q13*

Q12	Is there a particular reason why you have an unfavorable opinion of the Port of Long Beach? Verbatim responses recorded and later grouped into categories shown below.
	Questions, concerns about Port jobs — 27%
	Labor, Union issues — 20%
	Pollution, environmental concerns — 19%
	Increases traffic congestion — 17%
	Mismanagement, corruption concerns — 14%
	Not sure / Not particular reason — 5%
	Security, safety concerns — 4%
	Financial, funding concerns — 3%
	Growth, development concerns — 2%
	Imports from, exports to other countries — 2%
	Inconsiderate of residents' concerns — 1%

Q13	Next, I'm going to read a series of words or phrases. For each I read, I'd like you to tell me whether – in your opinion – it accurately describes the Port of Long Beach as a public agency. 'Yes' means you think the phrase does accurately describe the Port. No means it does not. If you don't have an opinion, just say so. Here is the (first/next) one: _____. Do you think this phrase accurately describes the Port of Long Beach?				
	Randomize	Yes	No	Not sure	Refused
A	Trustworthy	45%	15%	37%	2%
B	Fiscally responsible	45%	16%	38%	2%
C	Effective	66%	12%	21%	1%
D	Beneficial to the local economy	87%	4%	8%	1%
E	Does NOT care about residents' concerns	20%	49%	29%	2%
F	Cares about the environment	52%	22%	25%	1%
G	Involved in the community	52%	21%	26%	1%
H	Visionary	47%	19%	32%	1%
I	An important creator of jobs	83%	7%	10%	0%
J	Makes a positive difference in our community	72%	9%	18%	1%

Section 5: Port Communications				
Q14	Overall, are you satisfied or dissatisfied with the Port's efforts to communicate with residents through newsletters, television, the Internet, and other means? *Get answer, then ask:* Would that be very (satisfied/dissatisfied) or somewhat (satisfied/dissatisfied)?			
	1	Very satisfied	21%	
	2	Somewhat satisfied	38%	
	3	Somewhat dissatisfied	15%	
	4	Very dissatisfied	8%	
	98	Not sure	18%	
	99	Prefer not to answer	1%	
Q15	In the past year, do you recall hearing, reading or seeing any news stories, public service announcements, or advertisements relating to the Port of Long Beach?			
	1	Yes	70%	*Ask Q16*
	2	No	29%	*Skip to Q17*
	98	Not sure	2%	*Skip to Q17*
	99	Refused	0%	*Skip to Q17*
Q16	Where did you encounter information about the Port? *Probe:* Any other sources? *Do not read list – record up to first 3 responses.*			
	1	Los Angeles Times	8%	
	2	Long Beach **Press-Telegram**	16%	
	3	Downtown and Grunion Gazettes	5%	
	4	Port Newsletter/*Re:Port*	8%	
	5	Pulse of Port show/Cable TV Channel 8	0%	
	6	Port website	2%	
	7	Long Beach City website	1%	
	8	Internet (general)	24%	
	9	TV News	29%	
	10	Radio News	10%	
	11	Long Beach City Council Meetings	0%	
	12	HOA or Neighborhood newsletters	2%	
	13	Direct mail	16%	
	14	Friends / Family / Associates	7%	
	16	Other newspaper	10%	
	17	Billboard, banner	4%	
	18	Event Calendar	1%	
	19	Community event meetings	2%	
	21	Side of bus, bus stop	2%	

	24	Long Beach Business Journal	1%
	97	Other	1%
	98	Not sure	4%
	99	Prefer not to answer	0%

Q17 As I read the following ways that the Port of Long Beach can communicate with residents, I'd like to know if you think they would be a very effective, somewhat effective, or not at all effective way for the Port to communicate with you.

	Randomize	Very	Somewhat	Not at all	Not sure / Refused
A	Email	30%	35%	33%	3%
B	Electronic Newsletters	28%	38%	29%	4%
C	New social media like Twitter or Facebook	39%	29%	28%	4%
D	Port website	32%	33%	30%	4%
E	Newsletters and other materials mailed directly to your house	43%	37%	19%	2%
F	Automated phone calls	12%	21%	65%	2%
G	Long Beach Television on Channels 3 or 21	23%	30%	42%	4%
H	Advertisements in local papers	31%	42%	25%	2%
I	YouTube Videos	21%	37%	39%	3%
J	Text Messages	22%	25%	50%	3%

Section 6: Re:Port & Website

Q18 In the past year, did your household receive the Port's newsletter, called the *Re:Port* (ree-port)?

1	Yes	43%	*Ask Q19*
2	No	46%	*Skip to Q20*
98	Not sure	12%	*Skip to Q20*
99	Refused	0%	*Skip to Q20*

Q19 How often would you say that you read the Port's newsletter when it arrives? Would you say that you always read it, sometimes read it, rarely read it, or never read it?

1	Always	46%
2	Sometimes	35%
3	Rarely	12%
4	Never	4%
98	Not sure	2%
99	Refused	0%

Q20	In the past year, have you visited the Port's website?	
1	Yes	19%
2	No	81%
98	Not sure	0%
99	Refused	0%

Q21	In the past year, do you recall seeing: _____ for the Port of Long Beach?				
	Randomize	Yes	No	Not sure	Refused
A	Billboards	32%	66%	2%	0%
B	Advertisements on local buses	39%	58%	3%	1%

Section 7: Information & Attitudes

Q22	Next, I'm going to read you a series of statements. For each, I'd like you to tell me whether you agree or disagree with the statement. Here is the (first/next) one: _____. Do you agree or disagree, or do you have no opinion? Would that be strongly (agree/disagree) or somewhat (agree/disagree)?						
	Randomize	Strongly Agree	Somewhat Agree	Somewhat Disagree	Strongly Disagree	Not sure	Refused
A	The Port is a vital economic engine for Long Beach and the Southern California region. It is responsible for the creation of jobs and economic prosperity.	66%	22%	3%	1%	6%	1%
B	In order to stay competitive in the global economy and avoid losing business and jobs, the Port needs to make its facilities more productive and efficient.	55%	27%	3%	1%	13%	1%
C	Modernizing Port facilities to accommodate increased cargo is OK provided that it does not harm the environment.	56%	27%	5%	3%	9%	0%
D	International trade is important to our local, state, and national economies.	72%	20%	2%	1%	5%	0%
E	The Port of Long Beach is working hard to reduce the negative environmental impacts of shipping and cargo operations.	26%	33%	9%	7%	24%	1%
F	The Port of Long Beach does a good job managing large-scale construction projects, completing them on-time and on-budget.	19%	26%	7%	5%	41%	2%
G	The Port of Long Beach does NOT use tax payer money to fund its operations.	13%	13%	14%	10%	47%	3%

H	Construction projects at the Port are causing a lot of traffic congestion in Long Beach.	22%	23%	21%	12%	22%	1%
I	To keep up with demand and remain competitive in the global economy, the Port should expand its facilities and cargo carrying capacity	35%	29%	9%	6%	19%	1%

Q23	To the best of your knowledge, are trains used to move cargo at the Port of Long Beach, or are you not sure?		
	1	Yes, trains are used	45%
	2	No, trains are not used	8%
	98	Not sure	47%
	99	Refused	0%

Q24	Prior to taking this survey, were you aware that the Port offers free tours of the harbor?			
	1	Yes, was aware	35%	*Ask Q25*
	2	No, was not aware	63%	*Skip to Q26*
	98	Not sure	2%	*Skip to Q26*
	99	Refused	0%	*Skip to Q26*

Q25	Have you ever taken the free harbor tour offered by the Port?		
	1	Yes	33%
	2	No	66%
	98	Not sure	1%
	99	Refused	0%

Section 8: Follow-up Opinion of Port of Long Beach

Q26	Now that you have heard a bit more about the Port of Long Beach, let me ask you again: In general, do you have a favorable or unfavorable opinion of the Port of Long Beach – or do you not have an opinion either way? *If favorable or unfavorable, ask:* Would that be very (favorable/unfavorable) or somewhat (favorable/unfavorable)?		
	1	Very favorable	32%
	2	Somewhat favorable	25%
	3	Somewhat unfavorable	2%
	4	Very unfavorable	3%
	98	No opinion	36%
	99	Refused	1%

Section 9: Background & Demographics			
Thank you so much for your participation. I have just a few background questions for statistical purposes.			
D1	Do you own or rent your current residence?		
	1	Own	41%
	2	Rent	51%
	3	Live with family / friends and don't pay rent	3%
	99	Refused	5%
D2	Which of the following best describes your current home?		
	1	Single family detached home	47%
	2	Apartment	30%
	3	Condominium or townhome	16%
	4	Mobile home	1%
	99	Refused	6%
D3	Do you currently have any children under the age of 10 living in your home?		
	1	Yes	18%
	2	No	78%
	99	Refused	4%
D4	Do you currently have any children between the ages of 10 and 18 living in your home?		
	1	Yes	14%
	2	No	82%
	99	Refused	4%
D5	Do you have friends or family members who work at the Port of Long Beach?		
	1	Yes	30%
	2	No	66%
	99	Refused	4%

D6	Do you consider yourself to be an environmentalist? *If yes, ask:* Would that be a strong or a moderate environmentalist?		
	1	Yes, strong environmentalist	20%
	2	Yes, moderate environmentalist	38%
	3	No, not an environmentalist	36%
	99	Refused	6%
D7	Which of the following best describes your employment status? Would you say you are employed full-time, part-time, a student, a homemaker, retired, or are you in-between jobs right now?		
	1	Employed full-time	48%
	2	Employed part-time	10%
	3	Student	7%
	4	Homemaker	3%
	5	Retired	19%
	6	In-between jobs	5%
	99	Refused	7%
D8	What is the last grade or level you completed in school? (*Don't read choices*)		
	1	Elementary (8 or fewer years)	1%
	2	Some high school (9 to 11 years)	3%
	3	High school graduate (12 years)	15%
	4	Technical / Vocational school	3%
	5	Some college	24%
	6	College graduate	29%
	7	Some graduate school	2%
	8	Graduate, professional, doctorate degree (DDS, DVM, JD, LLM, MA, MS, MBA, MD, PhD)	18%
	99	Refused	5%

D9	What ethnic group do you consider yourself a part of or feel closest to? *(Read list if respondent hesitates)*		
	1	Caucasian/White	42%
	2	Latino/Hispanic	20%
	3	African-American/Black	17%
	4	American Indian or Alaskan Native	1%
	5	Asian – Korean, Japanese, Chinese, Vietnamese, Filipino or other Asian	7%
	6	Pacific Islander	1%
	7	Mixed Heritage	4%
	8	Other	2%
	99	Prefer not to answer	6%
D10	I have just one more question for you for statistical reasons. I am going to read some income categories. Please stop me when I reach the category that best describes your total household income.		
	1	Less than $25,000	18%
	2	$25,000 to less than $50,000	15%
	3	$50,000 to less than $75,000	14%
	4	$75,000 to less than $100,000	13%
	5	$100,000 to less than $150,000	12%
	6	$150,000 to less than $200,000	5%
	7	$200,000 or more	4%
	98	Not sure	4%
	99	Refused	15%
Those are all of the questions that I have for you! Thanks so much for participating in this important survey!			

Post-Interview & Sample Items			
S1	Gender		
	1	Male	50%
	2	Female	50%

S2	Party		
	1	Democrat	54%
	2	Republican	15%
	3	Other	8%
	4	DTS	24%
S3	Age on Voter File		
	1	18 to 29	20%
	2	30 to 39	20%
	3	40 to 49	17%
	4	50 to 64	25%
	5	65 or older	16%
	99	Not coded	2%
S4	Household Party Type		
	1	Single Dem	41%
	2	Dual Dem	8%
	3	Single Rep	8%
	4	Dual Rep	4%
	5	Single Other	23%
	6	Dual Other	3%
	7	Dem & Rep	2%
	8	Dem & Other	7%
	9	Rep & Other	2%
	0	Mixed (Dem + Rep + Other)	1%

S5	Council District		
	1	First	10%
	2	Second	16%
	3	Third	14%
	4	Fourth	11%
	5	Fifth	11%
	6	Sixth	8%
	7	Seventh	12%
	8	Eighth	11%
	9	Ninth	8%

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Amsterdam Marketing

Branding & Marketing Amsterdam Area

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Video I amsterdam

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Amsterdam Marketing

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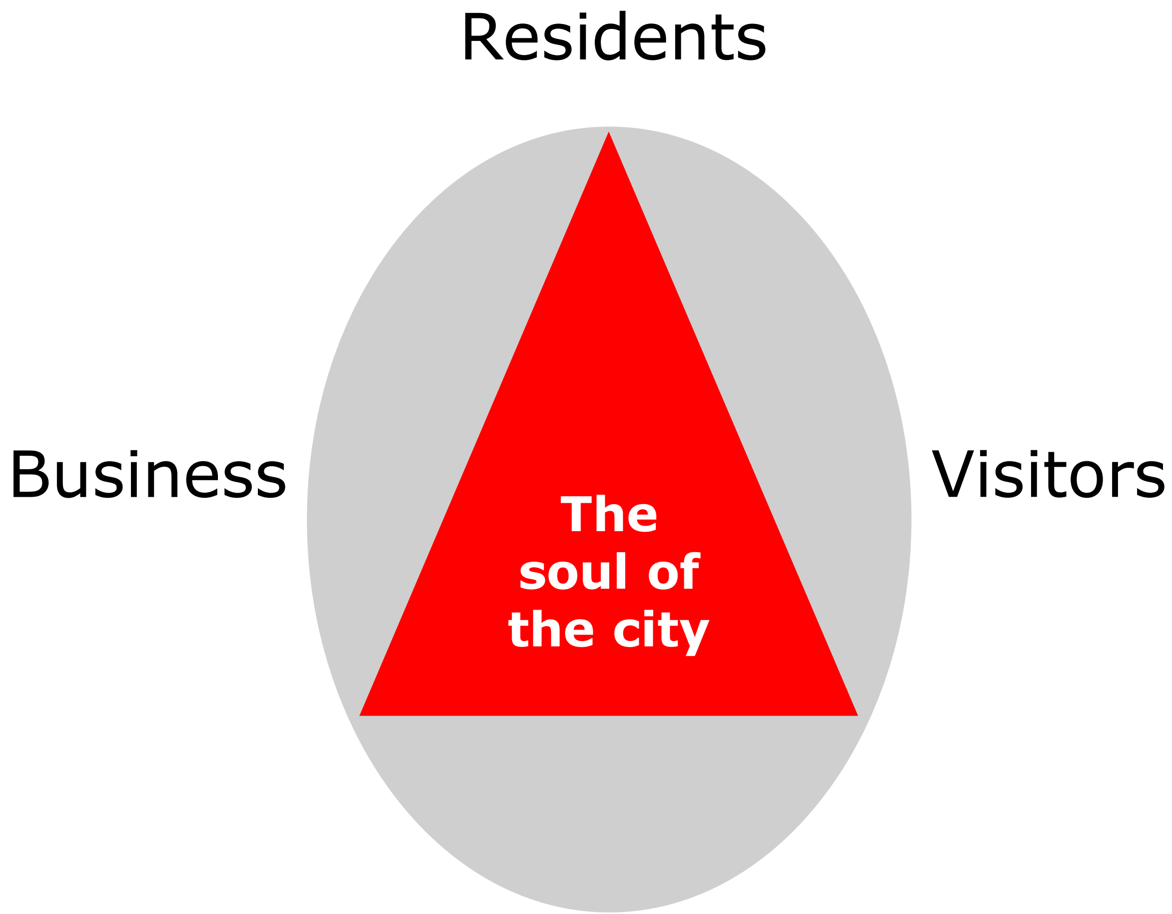
Goals

Amsterdam Area in Europe's top 5 as:

- An appealing city to live in
- An international business city
- A unique city for visitors
- An excellent city for meetings & conferences

Target groups



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Goals for residents

- Increase pride
- Promote cultural participation
- Discover your city

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Goals for visitors

- Increase the quality of visitors
- A more even distribution of visitors in terms of areas and timing

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Goals for business & meetings

- A stronger image
- Attract
- Retain

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Amsterdam in numbers

1.100 start-ups

1.839 restaurants

44 museums

180 nationalities

6 universities

> 2.500 houseboats

400 km cyclepath

>300 festivals per year

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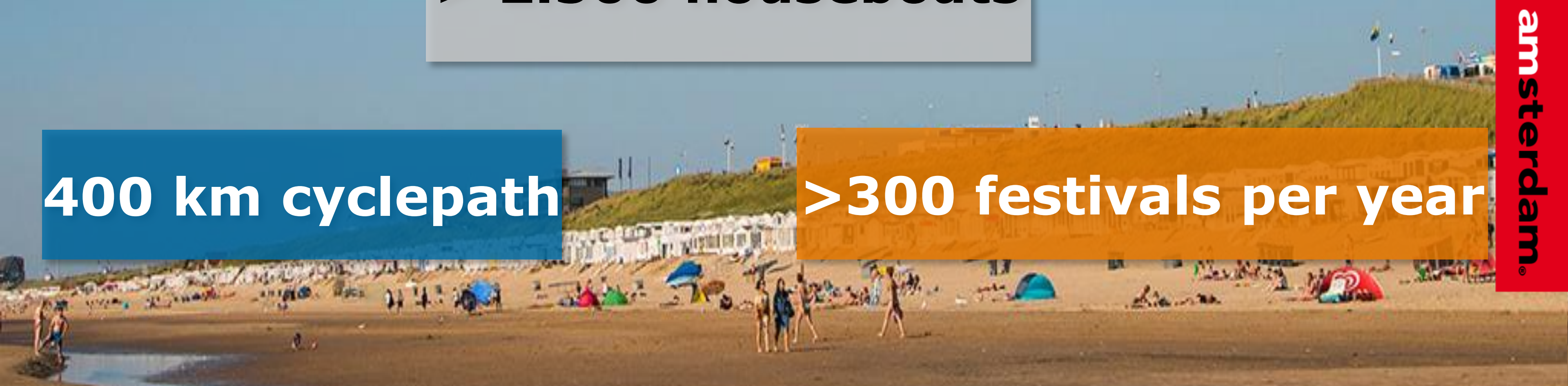

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Amsterdam in numbers

+ 9.3% Amsterdam Area

+ 10.6% Amsterdam

+ 6.3% Amsterdam Area excl. Amsterdam

growth in number of bed nights
Jan - may 2016

+3.3%
business related overnight stays
Jan – may 2016

41.000
hotel rooms
in Amsterdam Area (aug.2015)

45,000,000
city tax 2015
in euro's

138
expenditure per day (leisure)
in euro's

237
expenditure per day (business)
in euro's

I amsterdam.

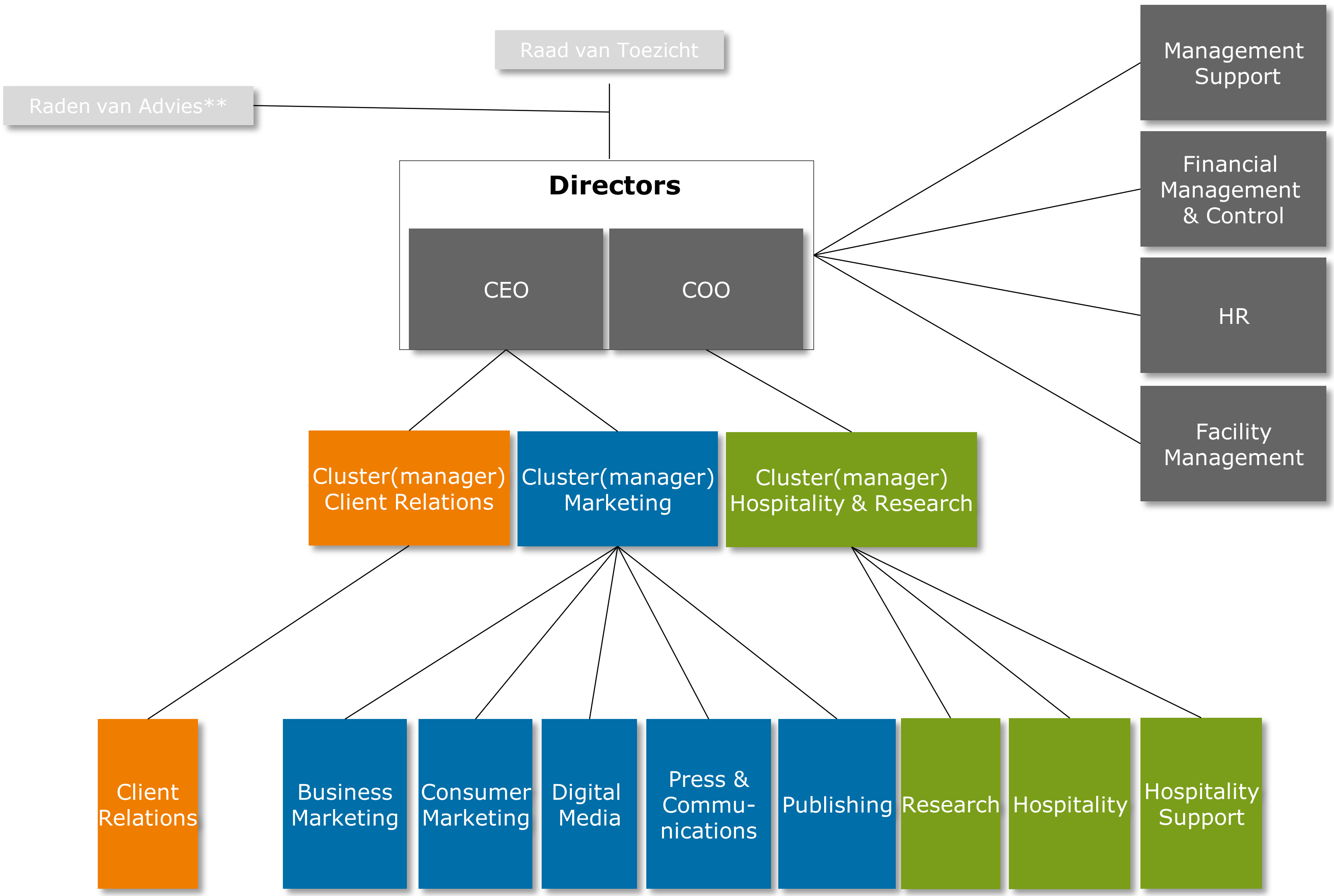
Strategy

- Public-private partnership
- Improve Amsterdam as a product
- Strengthen image of Amsterdam Area
- Branding with I amsterdam
- Focus on icons
- Charge the brand with three core values

Core values

- Innovative
- Creative
- Spirit of commerce

Organisation of Amsterdam Marketing



Advisory boards

I amsterdam.

Cooperation

Gemeente Amsterdam

HAMBURG Tourismus

amsterdam business

Holland. NBTC Holland Marketing

amsterdam economic **board**

NYC & Company

STARTUP AMSTERDAM

Visit Berlin

I amsterdam

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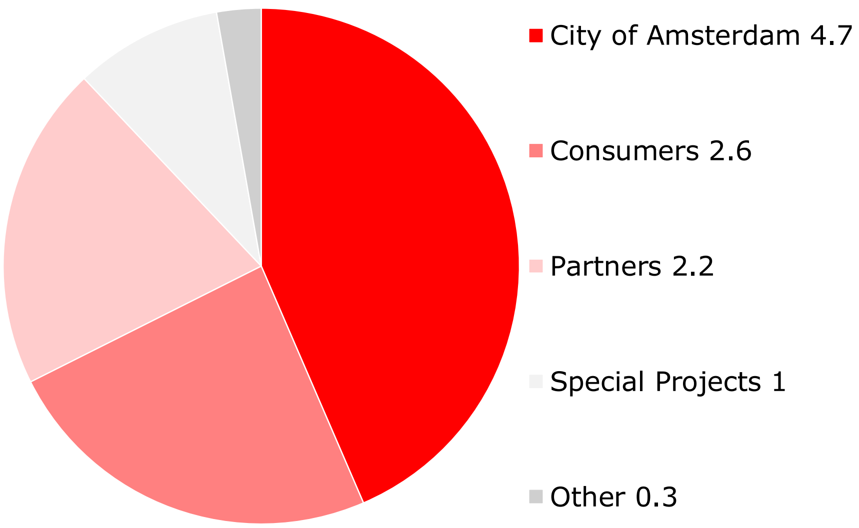
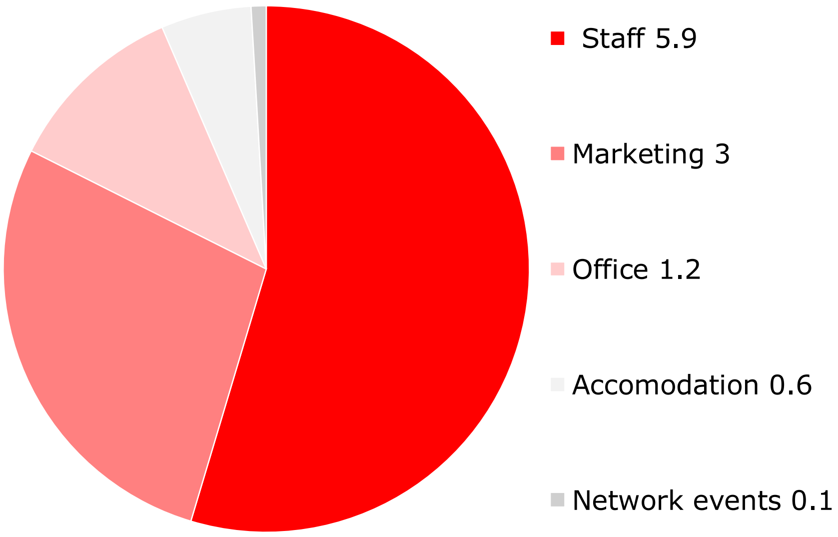
Revenue & Expenditure (in millions)

Revenue



Expenditure



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Strategy

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Branding & Marketing

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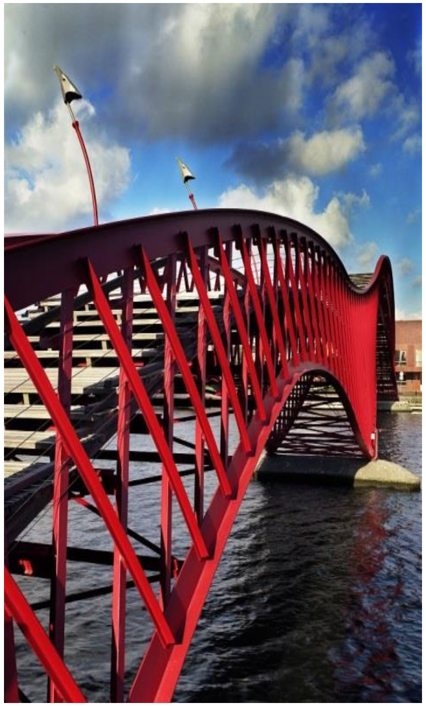
Strategy



Customer Journey

Awareness

Reputatio
n

Consideratio
n

Sales

Loyality

I amsterdam®

Strategy

DNA

↓

USP's

↓

Iconen

STORYTELLING

Strategy

Connect with

- existing initiatives, organisations, people etc.

Strengthen

- by means of marketing power

Make choices

- based on core values
- distinction of quality and uniqueness

I amsterdam

Storytelling met icons

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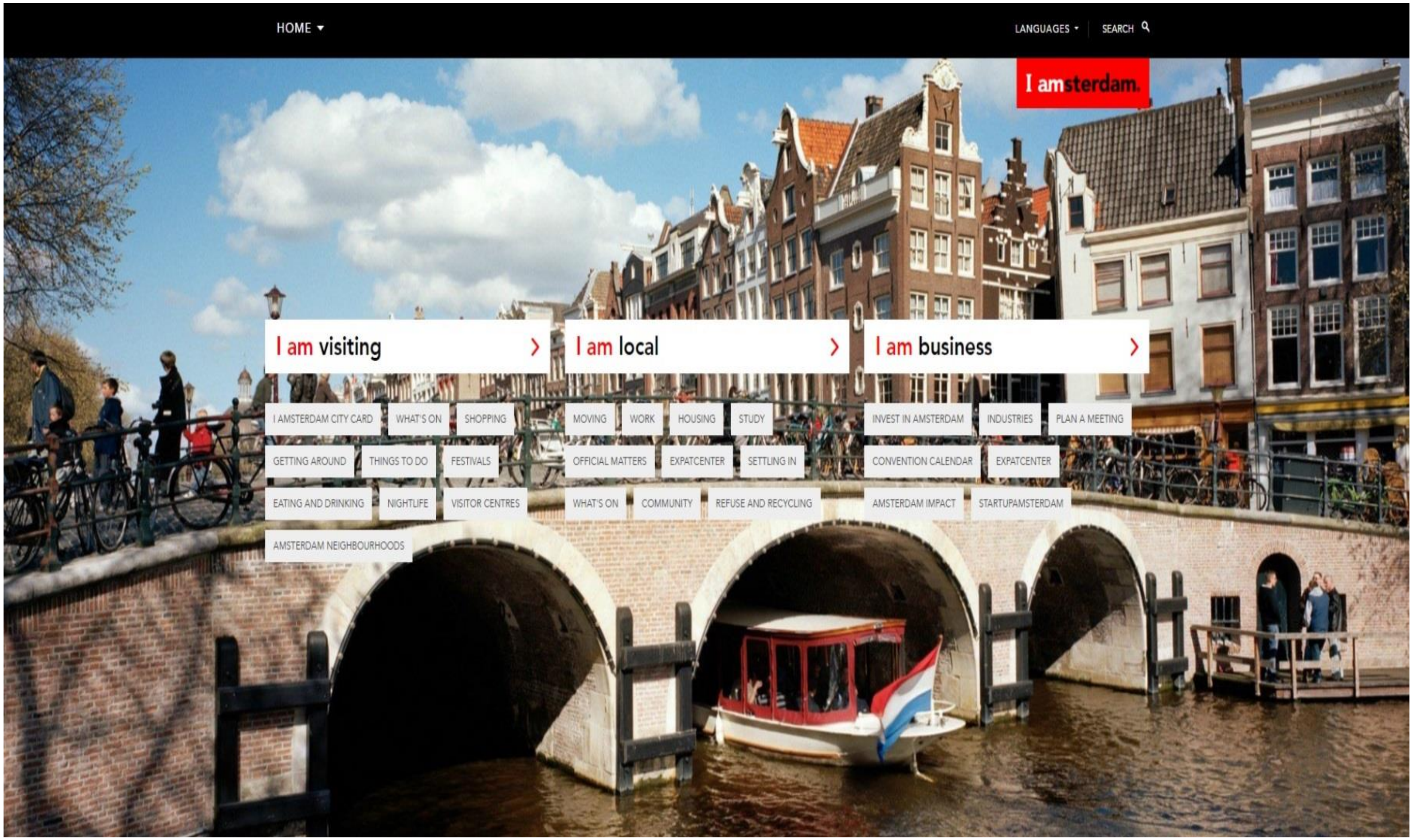
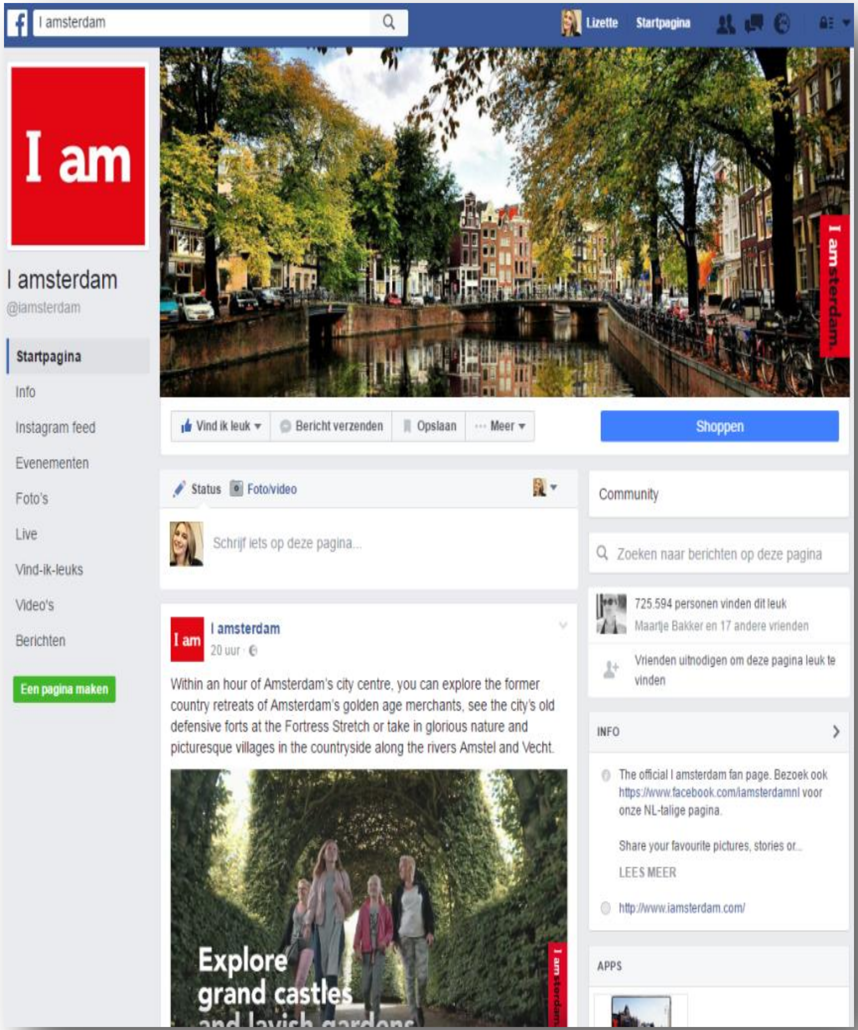
General communication channels (online)



More than 13 million visits per year

General communication channels (online)



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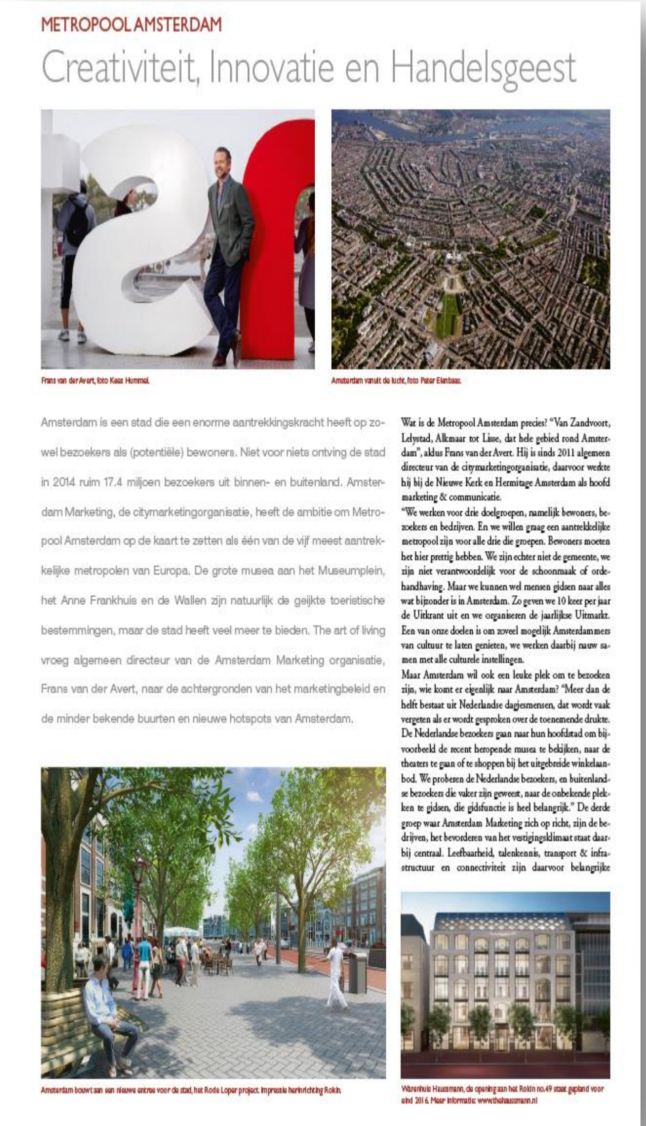
Press & media



METROPOOL AMSTERDAM

Creativiteit, Innovatie en Handelsgeest

Frans van der Avert, foto Kees Hummel.

Amsterdam vanuit de lucht, foto Peter Elenbaas.

Amsterdam is een stad die een enorme aantrekkingskracht heeft op zowel bezoekers als (potentiële) bewoners. Niet voor niets ontving de stad in 2014 ruim 17.4 miljoen bezoekers uit binnen- en buitenland. Amsterdam Marketing, de citymarketingorganisatie, heeft de ambitie om Metropool Amsterdam op de kaart te zetten als één van de vijf meest aantrekkelijke metropolen van Europa. De grote musea aan het Museumplein, het Anne Frankhuis en de Wallen zijn natuurlijk de geijkte toeristische bestemmingen, maar de stad heeft veel meer te bieden. The art of living vroeg algemeen directeur van de Amsterdam Marketing organisatie, Frans van der Avert, naar de achtergronden van het marketingbeleid en de minder bekende buurten en nieuwe hotspots van Amsterdam.

Wat is de Metropool Amsterdam precies? "Van Zandvoort, Lelystad, Alkmaar tot Lisse, dat hele gebied rond Amsterdam", aldus Frans van der Avert. Hij is sinds 2011 algemeen directeur van de citymarketingorganisatie, daarvoor werkte hij bij de Nieuwe Kerk en Hermitage Amsterdam als hoofd marketing & communicatie.

"We werken voor drie doelgroepen, namelijk bewoners, bezoekers en bedrijven. En we willen graag een aantrekkelijke metropool zijn voor alle drie die groepen. Bewoners moeten het hier prettig hebben. We zijn echter niet de gemeente, we zijn niet verantwoordelijk voor de schoonmaak of ordehandhaving. Maar we kunnen wel mensen gidsen naar alles wat bijzonder is in Amsterdam. Zo geven we 10 keer per jaar de Uitkrant uit en we organiseren de jaarlijkse Uitmarkt. Een van onze doelen is om zoveel mogelijk Amsterdammers van cultuur te laten genieten, we werken daarbij nauw samen met alle culturele instellingen.

Maar Amsterdam wil ook een leuke plek om te bezoeken zijn, wie komt er eigenlijk naar Amsterdam? "Meer dan de helft bestaat uit Nederlandse dagjesmensen, dat wordt vaak vergeten als er wordt gesproken over de toenemende drukte. De Nederlandse bezoekers gaan naar hun hoofdstad om bijvoorbeeld de recent heropende musea te bekijken, naar de theaters te gaan of te shoppen bij het uitgebreide winkelaanbod. We proberen de Nederlandse bezoekers, en buitenlandse bezoekers die vaker zijn geweest, naar de onbekende plekken te gidsen, die gidsfunctie is heel belangrijk." De derde groep waar Amsterdam Marketing zich op richt, zijn de bedrijven, het bevorderen van het vestigingsklimaat staat daarbij centraal. Leefbaarheid, talenkennis, transport & infrastructuur en connectiviteit zijn daarvoor belangrijke

Amsterdam bouwt aan een nieuwe entree voor de stad, het Rode Loper project. Impressie herinrichting Rokin.

Warenhuis Hausmann, de opening aan het Rokin no.49 staat gepland voor eind 2016. Meer informatie: www.thehaussmann.nl

12 VOYAGE

VOYAGE 13

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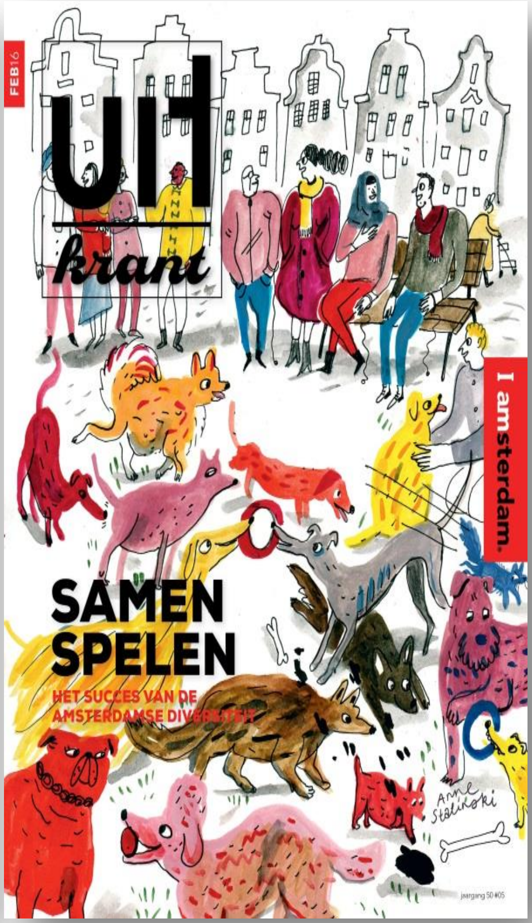
General communication channels (offline)



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Campaign for residents: 24H

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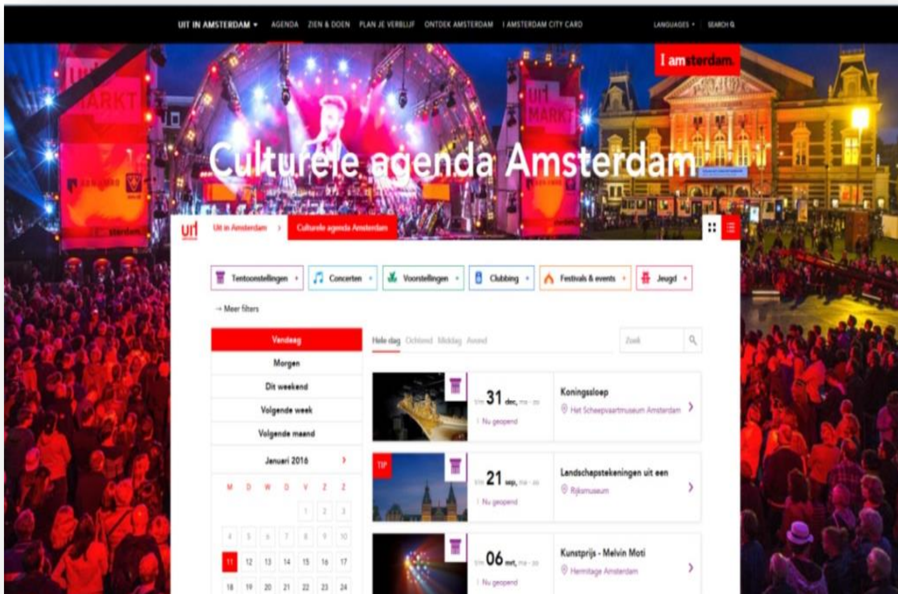
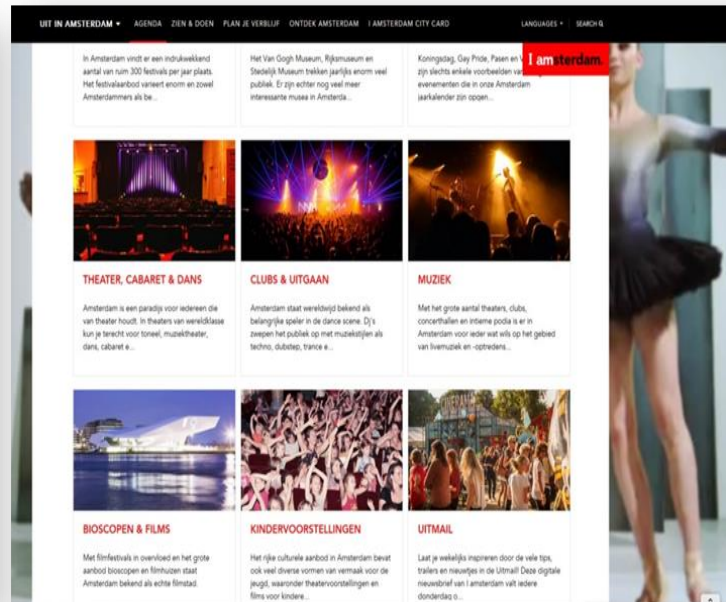
Campaign for residents: culture marketing





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Last Minute Ticket Shop

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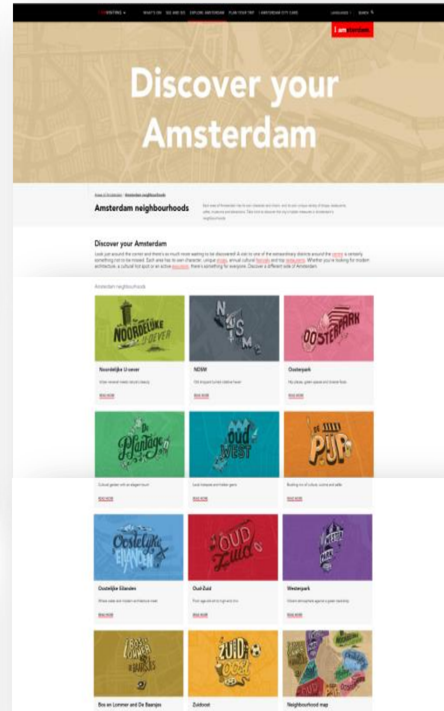
Campaign for visitors: neighbourhoods



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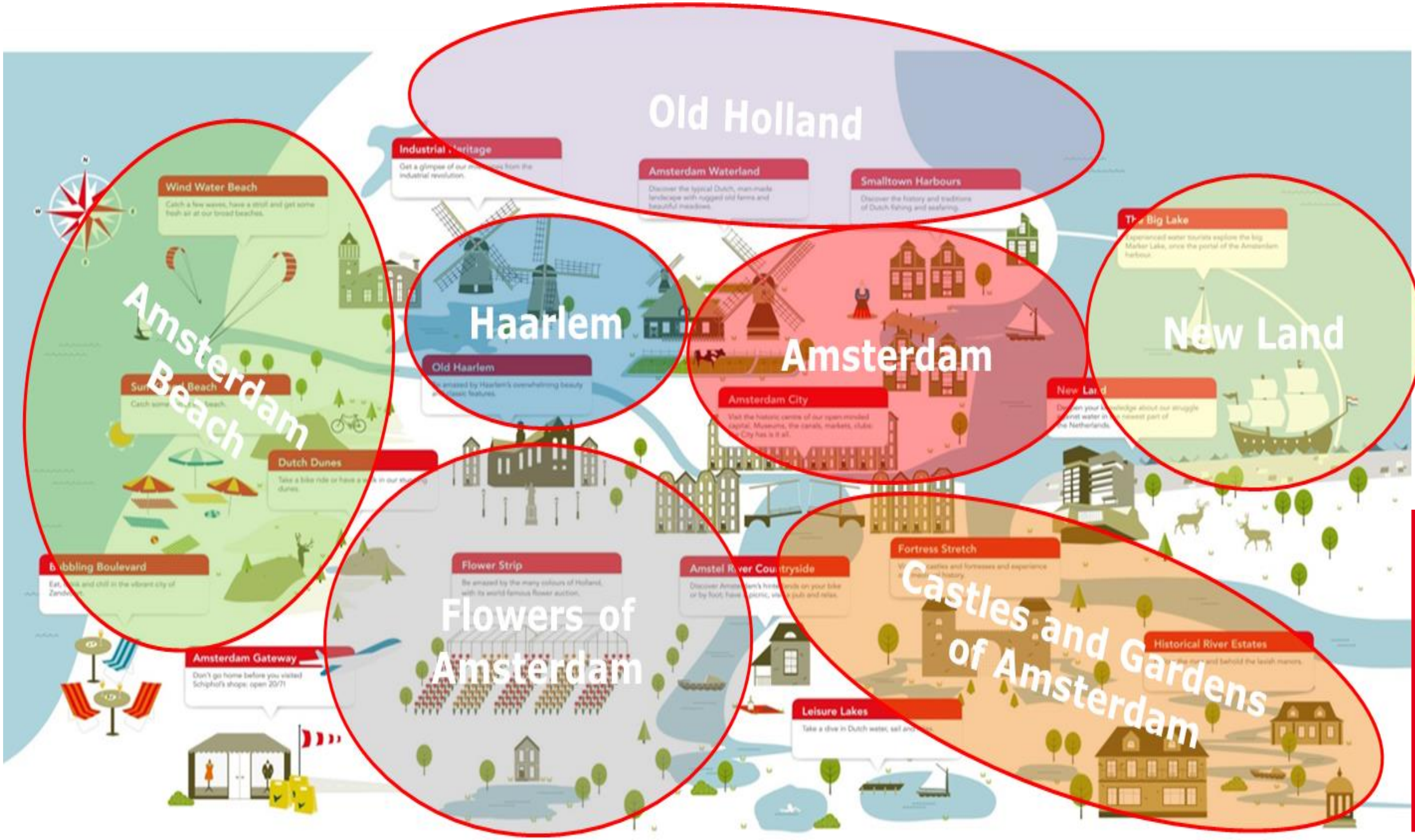
Campaign for visitors: Amsterdam Area



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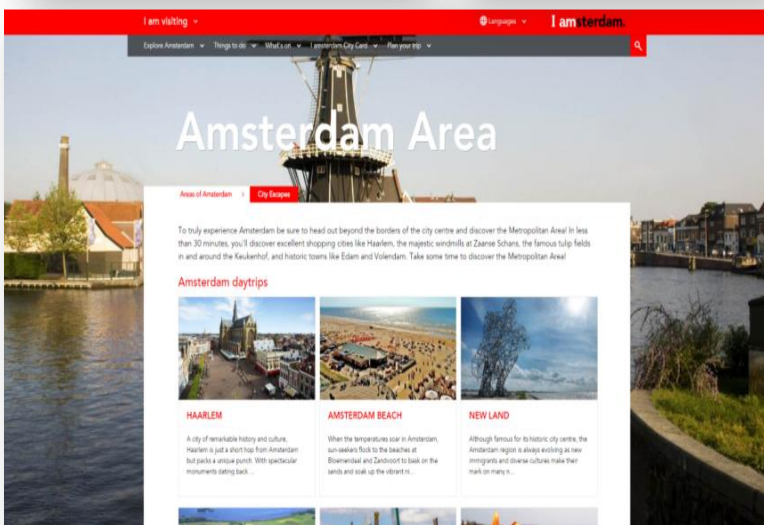
Examples of our approach to the Amsterdam Area



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Business Marketing

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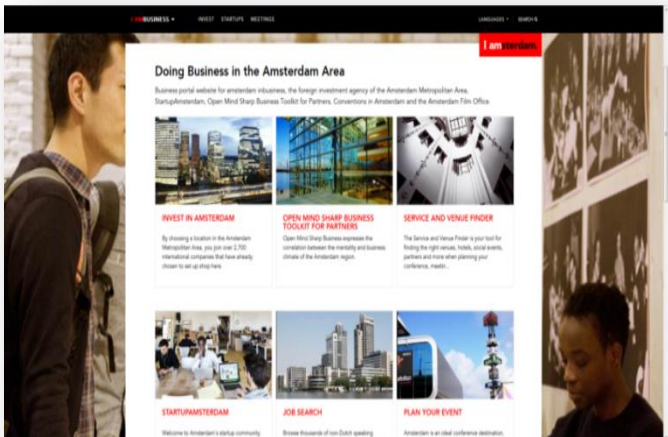
Business Marketing



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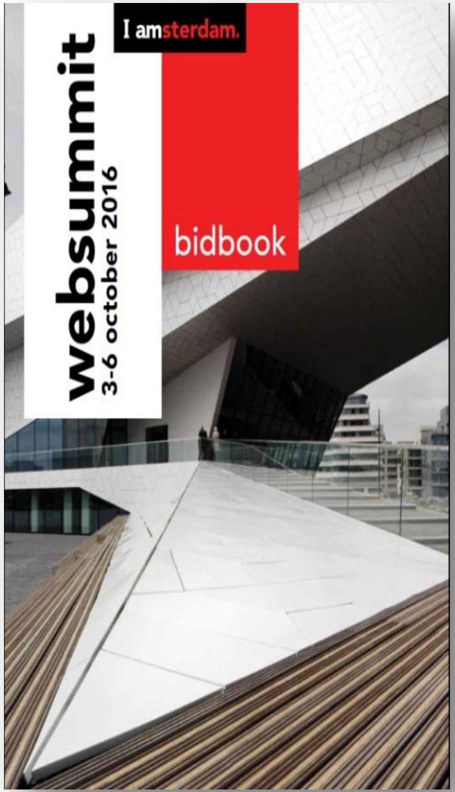
Business Marketing



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Hospitality & Research

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Hospitality & Research

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Extra

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Thank you!

iamsterdam I amsterdam

I amsterdam

amsterdam marketing

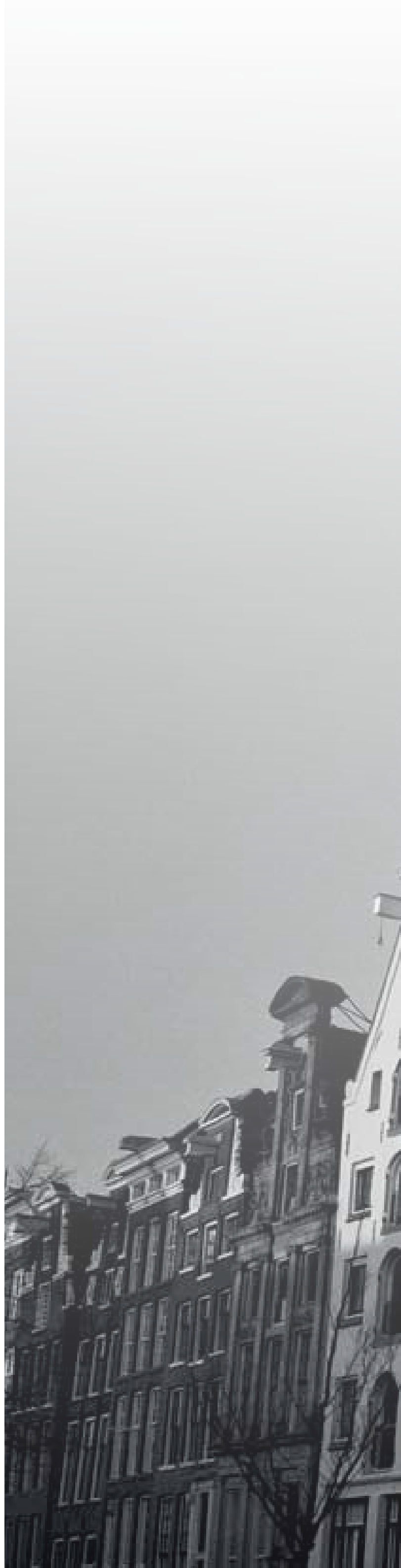
the organisation

I amsterdam®

One of the five most attractive metropolitan areas in Europe for residents, visitors, businesses and influential groups

WHO WE ARE

AMSTERDAM MARKETING is the city marketing organisation of the Amsterdam Metropolitan Area, active in the fields of promotion, information, research and services. Our ambition is to put this region on the map as one of the five most attractive metropolitan areas in Europe for its residents, visitors, businesses and influential groups. Under the motto 'I amsterdam', we present the region as a dynamic place to live and work, an attractive travel destination and a test market for innovation.



CORE VALUES OF THE AMSTERDAM METROPOLITAN AREA Creativity, innovation and commercial spirit are Amsterdam's three core values. They make up the DNA of the city, symbolise its unique character and are significant to its past, present and future. The brand is strongly and discernibly positioned in the market under the shared motto *I amsterdam*.

In pursuit of this mission we are able to draw upon a region rich in history and unique cultural offerings. There is a great tradition of freedom and tolerance, an international outlook, world-class icons and a thriving business environment. It is a place where people live, learn, explore and work. Where anyone visiting for business or pleasure can come and feel at home.

OBJECTIVE Amsterdam Marketing's goal is to execute the city marketing for the Amsterdam Metropolitan Area as an integrated activity, whereby we focus on national and international residents, businesses, visitors and influential figures. City marketing is an essential step in strengthening the economic position of the Amsterdam Metropolitan Area. This not only has a positive influence on the city's public image internationally but also for local residents, boosting their sense of civic pride and appreciation. To achieve this, we work together with public and private organisations, cultural institutions and universities.

Active in the fields of promotion, information, research and services

WHAT WE DO

THE KEY ACTIVITIES of Amsterdam Marketing include:

- Marketing and promotion
- Research, analysis and advice
- Initiating and stimulating innovation and product development throughout the market
- Providing expertise to corporations and government
- Conducting information and reception services
- Serving the interests of the region

TARGET GROUPS Amsterdam Marketing conducts its activities on behalf of the entire metropolitan area. At the top level we focus on city marketing's main target groups; residents, visitors and businesses.

The residents of the Amsterdam Metropolitan Area are our ambassadors and hosts. Visitors include tourists and business visitors from both the Netherlands and abroad. Businesses includes Dutch and international companies and organisations that invest in the Amsterdam Metropolitan Area or settle here because of its favourable business climate.

In order to reach out to these key target groups, influential groups also play an important role. These include intermediary parties such as the media, PCOs (professional conference organisers) and tour operators.

CLIENTS Amsterdam Marketing conducts its core activities in collaboration with local government, public-private and private organisations in the Amsterdam Metropolitan Area. Amsterdam Marketing is a not-for-profit organisation. This means that we do not work for profit. We invest our extra income directly into collective goals.

The City of Amsterdam is our biggest client, whereby we work closely with amsterdam inbusiness, the department of Economic Affairs, the City Government, the Amsterdam Economic Board and the Expatcenter. By integrating the municipal activities in the field of city marketing, we increase both the profitability and the efficiency.

HOW WE WORK

MARKETING, SERVICES AND RELATIONS These are the clusters within which we perform our activities. The marketing activities lead to increased awareness and improve the reputation of the Amsterdam Metropolitan Area. Our service activities lift the city's hospitality to a whole new level. A hospitable city plays an important role in the way visitors and residents experience it and contributes significantly to its overall esteem. Finally, the Relations cluster is the central point of contact for Amsterdam Marketing's partners.

MARKETING The marketing activity is divided into consumer marketing and business marketing.

Consumer marketing initiates, organises and coordinates campaigns, activities and promotions aimed at consumers. This means that we are active for international and national visitors and also residents. We want to entice consumers to visit the Amsterdam Metropolitan Area and familiarise residents with what's on offer. Amsterdam Marketing actively approaches both the domestic and international press and organises press trips to the Amsterdam Metropolitan Area to generate and increase attention on a global scale.

Business marketing promotes the Amsterdam Metropolitan Area nationally and internationally as an ideal location in which to invest, start a business and organise a conference or business meeting. Our main role lies in matching supply with demand.

SERVICES Amsterdam Marketing sees city hospitality as a vital part of city marketing. To optimise hospitality we provide services to visitors, residents, governing bodies and partners from the business, cultural and education sectors. Examples of this include our tourist offices, agencies, the Last Minute Ticket Shops, the 'Welcome Teams', our Service Centre and through our hospitality training.

To conduct service activities efficiently, research, development and consultancy are indispensable. We gather information on the latest market developments as a basis for our marketing policy and that of our clients. In addition, we collect, manage and distribute data in the fields of tourism, recreation and culture. We distribute this information via our database, websites, print media and information outlets.

RELATIONS The Relations cluster maintains contact with existing partners and encourages potential partners to participate in the integral city marketing activities. A variety of partnerships have been developed to cater to the different types of partners. Aside from relationship management, this cluster also includes sales activities for Amsterdam Marketing's services, products and advertising opportunities.

As the central organisation we connect cross-sector parties

TOGETHER WE ARE STRONGER

CONNECTION AND COOPERATION This is what makes Amsterdam Marketing strong and functional as a city marketing organisation. As the central organisation we connect cross-sector parties. More than ever, this comes down to this key principle: "together we are stronger".

By sharing knowledge we unite our clients, partners and target groups. Together we work on improvement and look for sustainable, cross-sector opportunities and solutions.

This makes Amsterdam Marketing a key cog in the machine of collaborative partnerships. By partnering with Amsterdam Marketing, businesses and organisations increase their visibility and reach. Together they contribute to the economic growth of the Amsterdam Metropolitan Area. We offer a city marketing platform that welcomes all cultural and social institutions, national and international companies, and educational and municipal services in the region.

Creative, innovative and aptly representing Amsterdam's commercial spirit

OUTLOOK

DEVELOPING A LONG-TERM VISION Planning for the long-term future of the Amsterdam Metropolitan Area is one of the primary purposes of Amsterdam Marketing. We are not only working to strengthen the economic and international position of the region over the next few years but also in the longer term. The coming years are of vital importance for the future of the Amsterdam Metropolitan Area and strong regional and European collaboration is essential to remain globally relevant and reinforce our competitive economic position.

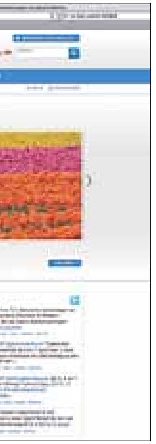
The power of this city and its surrounding area is its authenticity. In our increasingly globalised world, the desire for authentic, unique experiences and locations is growing. In this regard, the Amsterdam Metropolitan Area already has a fantastic starting point thanks to its four UNESCO World Heritage Sites. Amsterdam Marketing embraces the unique character of the region in all of its activities. And as we collaborate with our many partners, we will continue to seek out solutions that are creative, innovative and represent Amsterdam's commercial spirit whilst remaining firmly focussed on the future.

OUR PRODUCTS


LAST MINUTE
AMSTERDAM TICKET SHOP
50% OFF


City Card
expatcenter


GRACHT
Een wandeling door werelderfgoed
Van Amstel tot Zwanenburgwal
'De stad ademt water'
Eberhard van der Laan
I amsterdam.

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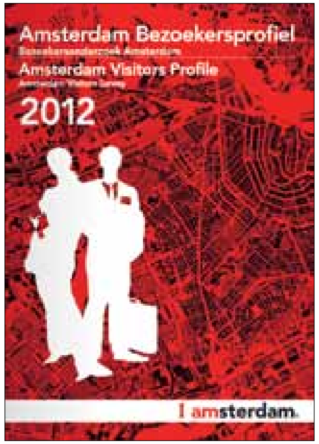
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