Downtown Norfolk Council
2013 Worker Study
Study Objectives

- Profile current non-work related use of Downtown Norfolk by Downtown Norfolk workers.
- Measure overall satisfaction with Downtown Norfolk. Satisfaction will be measured using overall 1-5 ratings and the Net Promoter Score™.
- Identify the current perceptions and misperceptions regarding Downtown Norfolk as a place to work, live and play.
- Assess how Downtown Norfolk is perceived as a regional asset - how is it positioned and valued as part of the overall Hampton Roads region?
- Assess ratings of importance and performance across Downtown Norfolk’s defining attributes.
- Identify performance gaps between expectation and current performance to help inform DNC’s long-term planning.
- Identify key issues related to transportation:
  - Current and future use of The Tide
  - Current and future use of Amtrak (expanded service)
  - Bikeability and walkability ratings
  - Future tolling on the tunnels
  - Future downtown restaurant development plans
- Build a panel of survey respondents who can be used in the future to test different ideas and concepts.
- Where appropriate, compare the findings of the 2013 Downtown Worker Study to DNC’s 2010 Downtown Worker Study and DNC’s 2012 Region-wide Residents Perception & Use Study.
Methodology

• SIR conducted an online survey from February 26 - March 18, 2013

• The Downtown Norfolk Council distributed the link to their list of workers in the downtown area

• A total of 540 people completed the survey

• Study results contain a margin of error of +/- 4.21 percentage points at the 95% confidence level

• For comparison, in 2010 a total of 391 people completed the survey
Respondent Profile
Southeastern Institute of Research

Gen X and Baby Boomer Respondents Were Most Likely to Participate in the Survey

The Mean Age Is 45

- Millennials (1983-): 16%
- Generation X (1965-1982): 47%
- Baby Boomers (1946-1964): 35%
- Silent Generation (1905-1943): 2%

Q37. In what year were you born?

n = 540
A Majority of Respondents Are Female

Q39. What is your gender?

Female 62%
Male 38%

n = 540
Total Annual Household Income Is Even Across Most Categories

The Average HHI Is $85,000

Q38. What is your total annual household income before taxes?

The average HHI in 2010 was $90,900.

n = 540
Respondents Reported Working in a Variety of Different Sectors

Bank/financial services/Stockbroker 20%
Media (TV, newspaper, radio) 14%
Marketing/Advertising agency/Public relations 14%
Other 10%
Federal, State or city government 9%
Technology/IT/Computers 8%
Law firm/Accounting firm 6%
Real estate 3%
Non-profit organization 3%
Retail store/Restaurant/Service establishment 2%
Maritime-related firm 2%
Engineering 1%
Consulting 1%
Arts/Design 1%
Cultural/Entertainment venue 1%
Educational institution 1%
Insurance services 1%

Q35. Which of the following best describes your employer?

n = 540
86% of Respondents Work Five Days a Week in Downtown Norfolk

Q3. How many days per week do you work in Downtown Norfolk?
Respondents Reported Working in Downtown Norfolk Anywhere from 0-48 Years

*The Average Is 8.91 Years*

Q22. About how long have you worked in Downtown Norfolk?

- 0-5 Years: 45%
- 6-10 Years: 25%
- 10+ Years: 30%

n = 540
7
Key Topic Areas
7 Key Topic Areas

1. Commuting Habits
2. Dining Habits
3. Dining, Shopping and Entertainment
4. Overall Perception
5. Areas of Improvement
6. Satisfaction Drivers
7. Panel
Participants have an overwhelming reliance on driving alone to work - single occupant vehicle (SOV) commuting.
A Majority of Respondents Either Work on Main Street or Granby Street

- Main Street/Plume Street/Financial District: 39%
- Granby Street District: 31%
- Monticello Avenue Corridor: 4%
- Between Brambleton Avenue and Virginia Beach Boulevard: 3%
- City Hall/Government-Courts Complex: 2%
- Medical Center Complex: 1%
- MacArthur Center: 1%
- Other: 19%

Q36. Where is your place of employment located?

n = 540
Q31. How do you usually commute to work?

Millennials are most likely to report using The Tide.

Drive own car is up 5% since the 2010 study.

Drive own car: 87%
The Tide: 10%
Walk: 7%
Carpool/Drive with friend or co-worker: 6%
Ferry: 3%
Bike: 3%
Bus: 2%
Other: 1%

n = 540
Approximately 40% of Respondents Are from Norfolk and 31% Are from Virginia Beach

Q2. Where do you live?

- Norfolk: 38%
- Virginia Beach: 31%
- Chesapeake: 13%
- Portsmouth: 6%
- Suffolk: 5%
- Peninsula: 4%
- Other Virginia city/county: 1%
- Other: 1%
- North Carolina city/county: 0%

Please note that 60% of respondents live outside of Norfolk.

n = 540
Approximately Half of Respondents Reported That Their Employer Pays for Their Parking

Q32. Do you personally pay for your parking or does your employer pay for your parking?

- My employer pays for all of my parking: 55%
- I pay for all of my parking: 21%
- My employer and I each pay for part of the cost of parking: 8%
- Not applicable: 16%

n = 540
Only 40% of Respondents Are Satisfied with Public Transportation

<table>
<thead>
<tr>
<th>Category</th>
<th>15%</th>
<th>24%</th>
<th>21%</th>
<th>31%</th>
<th>25%</th>
<th>16%</th>
<th>23%</th>
<th>40%</th>
</tr>
</thead>
<tbody>
<tr>
<td>Bikeability/walkability</td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td>48%</td>
</tr>
<tr>
<td>Ease of parking</td>
<td>21%</td>
<td></td>
<td>23%</td>
<td></td>
<td></td>
<td></td>
<td></td>
<td>44%</td>
</tr>
<tr>
<td>Public transportation options</td>
<td>24%</td>
<td></td>
<td>16%</td>
<td></td>
<td></td>
<td></td>
<td></td>
<td>40%</td>
</tr>
<tr>
<td>Appropriate levels of tolling on roads/tunnels</td>
<td>15%</td>
<td></td>
<td>25%</td>
<td></td>
<td></td>
<td></td>
<td></td>
<td>40%</td>
</tr>
</tbody>
</table>

Percentages represent top two box ratings of “4” and “5.”

Respondents who ride The Tide to work are more satisfied with public transportation than other respondents. (Please keep in mind the sample of The Tide riders is too low to do significance testing.)

n = 540

Q33. How satisfied are you with each of the following concerning your experience working Downtown?
Respondents Who Live in Norfolk Are More Satisfied with Public Transportation Than Outsiders

<table>
<thead>
<tr>
<th>Group</th>
<th>Satisfaction with Public Transportation</th>
</tr>
</thead>
<tbody>
<tr>
<td>Generations</td>
<td></td>
</tr>
<tr>
<td>Millennials</td>
<td>40%</td>
</tr>
<tr>
<td>Generation X</td>
<td>40%</td>
</tr>
<tr>
<td>Baby Boomers</td>
<td>43%</td>
</tr>
<tr>
<td>Perception</td>
<td></td>
</tr>
<tr>
<td>Negative</td>
<td>23%</td>
</tr>
<tr>
<td>Positive</td>
<td>47%</td>
</tr>
<tr>
<td>Time worked</td>
<td></td>
</tr>
<tr>
<td>0-5 years</td>
<td>37%</td>
</tr>
<tr>
<td>6-10 years</td>
<td>44%</td>
</tr>
<tr>
<td>10+ Years</td>
<td>41%</td>
</tr>
<tr>
<td>Residence</td>
<td></td>
</tr>
<tr>
<td>In Norfolk</td>
<td>44%</td>
</tr>
<tr>
<td>Outside Norfolk</td>
<td>38%</td>
</tr>
</tbody>
</table>

Please note: Yellow boxes indicate where percentages are statistically significant.

n = 540
Respondents Would Be Encouraged to Bike More If the Roads Became Safer or If There Were More Bike Lanes Available

- Became safer/More bike lanes: 39%
- Less constraints on my time: 24%
- Workplace provided showers/locker rooms: 23%
- Bike parking/storage: 20%
- Improvements in personal health/fitness: 17%
- Less inconvenience for emergencies or errands: 11%
- Other: 32%

Q34. What, if anything, might encourage you to bike more?

n = 540
Implication

With 60% of the respondent workforce residing outside of Norfolk and satisfaction with public transportation being below average, workers do not feel like they have any other option but to drive alone.
Dining Habits
Outside of work, Downtown Norfolk is most often used for restaurants and shopping.
On Average, Respondents Pack Their Lunch Two Days a Week and Eat Out One to Two Days

<table>
<thead>
<tr>
<th>Activity</th>
<th>Average # of Meals</th>
</tr>
</thead>
<tbody>
<tr>
<td>Eaten at a restaurant</td>
<td>1.5</td>
</tr>
<tr>
<td>Eaten at the office</td>
<td>1.3</td>
</tr>
<tr>
<td>Brought from home</td>
<td>2.3</td>
</tr>
<tr>
<td>Skipped</td>
<td>0.3</td>
</tr>
</tbody>
</table>

8_1. How many times during a typical workweek do you leave your office and eat lunch in any type of restaurant in Downtown Norfolk?
8_2. How many times during a typical workweek do you buy lunch (carry-out or delivery) and eat lunch in your office?
8_3. How many times during a typical workweek do you bring your lunch from home?
8_4. How many times during the typical workweek do you skip lunch?
On Average, Respondents Have 45 Minutes for Lunch and Spend Less Than $10

The average amount spent on lunch in 2010 was $7.62.

9. How many minutes are you allowed to spend on your lunch break?
10. What amount do you generally pay for lunch during the workday?
11. For a typical lunch, how many blocks are you willing to walk from your office to a restaurant?
Respondents Are Most Likely to Frequent Restaurants in Norfolk and MacArthur Center

To any restaurant, café or bar NOT inside MacArthur Center: 34
To MacArthur Center for shopping, dining or movies: 32
Go to Downtown for any other reasons not mentioned: 9
Go to the library, church, post office, city hall or federal or city offices: 8
For any shopping NOT inside MacArthur Center: 7
To visit a doctor, lawyer, accountant, stockbroker, banker or other professional office: 5
To go to any event or outdoor entertainment in Town Point Park, such as a concert, festival, art show or fireworks including Harborfest: 4
To visit D’Art Center in the Selden Arcade: 4
For you or a family member to attend school: 3
For any sporting event at Scope or Harbor Park: 3
For any cultural activity at Chrysler Hall, Wells Theater, the Roper Center, Chrysler Museum or Harrison Opera House: 3
For any entertainment activity at Scope, The NorVa or Granby Theater: 2
To Nauticus, the Hampton Roads Naval Museum, of the USS Wisconsin battleship: 2
To go to Harbor Park for any activity other than a sporting event: 1

Q15. During the **past year**, how many times have you visited each of the following places either before, during or immediately after your workday?

n = 540
On Average, Respondents Have Spent Approximately $150 on Food and Shopping in the Past 30 Days in Norfolk

Average amount spent in past 30 days on food: $140
Average amount spent on shopping: $153
Average number of dinners eaten in Norfolk in the past 30 days: 3.4

16_1. For all Food and Beverages in Downtown Norfolk including breakfast, lunch, dinner, coffee, snacks and other meals
16_2. For all shopping in Downtown Norfolk
17. During the past 30 days, how many times have you eaten dinner in any restaurant in Downtown Norfolk - during the week or on weekends?
A Majority of Respondents Are Most Likely to Report That Their Dining Habits Have Remained the Same Over the Past Year

- Don't know: 7%
- Decreased: 19%
- Stayed the same: 58%
- Increased: 16%

Q18. Over the past year, has your frequency of having dinner in Downtown Norfolk’s restaurants increased, decreased or stayed the same?
Millennials Are Most Likely to Have Increased Their Frequency of Having Dinner Out in Downtown Norfolk

<table>
<thead>
<tr>
<th>Group</th>
<th>Increased</th>
</tr>
</thead>
<tbody>
<tr>
<td>Generations</td>
<td></td>
</tr>
<tr>
<td>Millennials</td>
<td>33%</td>
</tr>
<tr>
<td>Generation X</td>
<td>14%</td>
</tr>
<tr>
<td>Baby Boomers</td>
<td>13%</td>
</tr>
<tr>
<td>Perception</td>
<td></td>
</tr>
<tr>
<td>Negative</td>
<td>13%</td>
</tr>
<tr>
<td>Positive</td>
<td>18%</td>
</tr>
<tr>
<td>Time worked</td>
<td></td>
</tr>
<tr>
<td>0-5 years</td>
<td>25%</td>
</tr>
<tr>
<td>6-10 years</td>
<td>8%</td>
</tr>
<tr>
<td>10+ Years</td>
<td>10%</td>
</tr>
<tr>
<td>Residence</td>
<td></td>
</tr>
<tr>
<td>In Norfolk</td>
<td>20%</td>
</tr>
<tr>
<td>Outside Norfolk</td>
<td>14%</td>
</tr>
</tbody>
</table>

Please note: Yellow boxes indicate where percentages are statistically significant.

n = 540
Why has your use of Downtown Norfolk’s restaurants increased?

“Groupons for downtown restaurants.”

“I am now working and living in the Downtown area. Convenience is the primary reason.”

“More variety is available. Convenience for after work some times. Restaurant Week has helped with what kind of restaurants are in downtown.”

“Social events for work are being held in downtown Norfolk versus the beach.”

“Started working in Downtown Norfolk and also Norfolk Restaurant week.”

“Several places advertised dinner specials.”
Implication

The average number of dinners eaten in Norfolk in a 30-day period is 3.4, which is up from 2.6 in 2010. Celebrate your success in knowing that more workers are eating dinner out more often. The average number of lunches eaten at a restaurant or take-out in a 30-day period is 11.2. Focus your attention on lunch specials, as workers frequent these options most often.
Dining, Shopping and Entertainment
Workers are most satisfied with Downtown Norfolk as the setting for their job and think adding non-chain restaurants will complement the area well.
Four in Five Respondents Are Satisfied with Downtown Norfolk as the Setting for Their Job

Percentages represent top two box ratings of “4” and “5.”

Q26. On a scale of 1 to 5, with 1 being the LOWEST score and 5 being the HIGHEST score, how would you rate the following:

- Overall satisfaction with Norfolk as the setting for your job
- The quality of Norfolk’s dining options
- Norfolk as your preferred work location in the Hampton Roads area
- Norfolk as an efficient place to conduct business
- Norfolk as a place with amenities that you can enjoy during the workday or after work
- The quality of Norfolk’s shopping options
- The variety of Norfolk’s dining options
- Norfolk’s social environment for seeing friends and co-workers
- The quality of Norfolk’s entertainment options
- Reputation – it’s a “cool” place to work
- The variety of Norfolk’s entertainment options
- The variety of Norfolk’s shopping options

n = 540
Nearly Two-Thirds of Respondents Are Likely to Visit Food Trucks If They Were Allowed in Norfolk

Respondents who reported that they are likely to visit food trucks said they would visit them an average of 2.2 times per week.

Q12. If Downtown Norfolk were to allow food trucks to operate downtown, how likely do you think you might be to visit one?

- 1 - Not at all likely: 12%
- 2: 10%
- 3: 18%
- 4: 16%
- 5 - Very Likely: 46%

n = 540
63% of Respondents Want More Non-Chain, Local Dining Options Added to Norfolk

Q21. Which of the following types of stores or restaurants, if any, do you think should be added to Downtown Norfolk to complement the existing base of stores and restaurants?

- Non-chain, local dining: 63%
- Major retail shops - department store: 52%
- Major retail shops - non-department store: 52%
- Boutique shopping: 43%
- Family dining establishments: 41%
- Informal chain restaurants: 31%
- Formal chain restaurants: 26%

n = 540
There Is No One Aspect of Downtown Norfolk That Stands Out As the Overwhelming Favorite

Q27. Which one feature or aspect of Downtown Norfolk do you like best?

n = 540
Implication

Recall that most respondents’ dining habits have remained the same over time. Non-chain food options and food trucks may be the driving force that increases the amount of money spent per week on dining in Downtown Norfolk.
Overall Perception
A majority of respondents have a positive overall perception of Downtown Norfolk as a place to work, but fewer would recommend it as a place to live or play.
Q4. Generally, what is your overall perception of Downtown Norfolk, more positive or more negative?

Three-Quarters of All Respondents Rate Downtown Norfolk Positively

- **5 - Fairly Positive**: 32%
- **4**: 41%
- **3**: 21%
- **2**: 5%
- **1 - Fairly Negative**: 1%

Positive - 73%

Negative - 27%

n = 540
Four in Five Respondents Are Satisfied with Downtown Norfolk As a Place to Work

Q24. Overall, how satisfied are you with Downtown Norfolk as a place to do each of the following.

- **To live**: 19% (high), 11% (medium), 30% (low)
- **To work**: 44% (high), 34% (medium), 78% (low)
- **To play**: 35% (high), 13% (medium), 48% (low)

Percentages represent top two box ratings of “4” and “5.”

n = 540
**Boomers Are the Most Satisfied with Downtown Norfolk As a Place to Live and Work**

<table>
<thead>
<tr>
<th>Group</th>
<th>To Live</th>
<th>To Work</th>
<th>To Play</th>
</tr>
</thead>
<tbody>
<tr>
<td><strong>Generations</strong></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Millennials</td>
<td>28%</td>
<td>77%</td>
<td>52%</td>
</tr>
<tr>
<td>Generation X</td>
<td>22%</td>
<td>77%</td>
<td>43%</td>
</tr>
<tr>
<td>Baby Boomers</td>
<td>44%</td>
<td>82%</td>
<td>54%</td>
</tr>
<tr>
<td><strong>Perception</strong></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Negative</td>
<td>15%</td>
<td>46%</td>
<td>16%</td>
</tr>
<tr>
<td>Positive</td>
<td>37%</td>
<td>90%</td>
<td>59%</td>
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<tr>
<td><strong>Time worked</strong></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>0-5 years</td>
<td>29%</td>
<td>74%</td>
<td>44%</td>
</tr>
<tr>
<td>6-10 years</td>
<td>26%</td>
<td>74%</td>
<td>48%</td>
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<tr>
<td>10+ Years</td>
<td>37%</td>
<td>85%</td>
<td>51%</td>
</tr>
<tr>
<td><strong>Residence</strong></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>In Norfolk</td>
<td>55%</td>
<td>83%</td>
<td>54%</td>
</tr>
<tr>
<td>Outside Norfolk</td>
<td>16%</td>
<td>75%</td>
<td>43%</td>
</tr>
</tbody>
</table>

Please note: Yellow boxes indicate where percentages are statistically significant.

n = 540
Two in Five Respondents Are Willing to Recommend Downtown Norfolk As a Place to Work

Q25. Overall, how likely are you to recommend Downtown Norfolk to a relative or friend as a place to do each of the following?

n = 540

Please note: Previous waves reported likelihood to recommend on a 1-5 scale instead of a 0-10 scale, which is more commonly used for NPS.
Q25. Overall, how likely are you to recommend Downtown Norfolk to a relative or friend as a place to do each of the following?
Downtown Norfolk Has a Net Promoter Score™ of 12% for Work

<table>
<thead>
<tr>
<th>Live</th>
<th>Work</th>
<th>Play</th>
</tr>
</thead>
<tbody>
<tr>
<td>17%</td>
<td>39%</td>
<td>28%</td>
</tr>
<tr>
<td>-</td>
<td>-</td>
<td>-</td>
</tr>
<tr>
<td>63%</td>
<td>27%</td>
<td>45%</td>
</tr>
</tbody>
</table>

Net Promoter Score™

-46% 12% -17%
Respondents Who Live in Norfolk Are the Most Likely to Recommend Downtown Norfolk As a Place to Live, Work and Play

<table>
<thead>
<tr>
<th>Group</th>
<th>To Live</th>
<th>To Work</th>
<th>To Play</th>
</tr>
</thead>
<tbody>
<tr>
<td>Generations</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Millennials</td>
<td>-55%</td>
<td>15%</td>
<td>-19%</td>
</tr>
<tr>
<td>Generation X</td>
<td>-60%</td>
<td>6%</td>
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<td>Baby Boomers</td>
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<td>21%</td>
<td>-5%</td>
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<tr>
<td>Perception</td>
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<tr>
<td>Negative</td>
<td>-83%</td>
<td>-43%</td>
<td>-66%</td>
</tr>
<tr>
<td>Positive</td>
<td>-34%</td>
<td>30%</td>
<td>2%</td>
</tr>
<tr>
<td>Time Worked in Norfolk</td>
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</tr>
<tr>
<td>0-5 years</td>
<td>-54%</td>
<td>4%</td>
<td>-27%</td>
</tr>
<tr>
<td>6-10 years</td>
<td>-53%</td>
<td>8%</td>
<td>-22%</td>
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<tr>
<td>10+ Years</td>
<td>-32%</td>
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<td>-4%</td>
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<tr>
<td>Residence</td>
<td></td>
<td></td>
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<tr>
<td>In Norfolk</td>
<td>-14%</td>
<td>23%</td>
<td>-8%</td>
</tr>
<tr>
<td>Outside Norfolk</td>
<td>-67%</td>
<td>4%</td>
<td>-23%</td>
</tr>
</tbody>
</table>

Please note: Yellow boxes indicate where percentages are statistically significant. n = 540
What do you LIKE MOST about Downtown Norfolk as the setting for your job?
What do you LIKE LEAST about Downtown Norfolk as the setting for your job?
Q30. All things considered, how do the things you like most about Downtown Norfolk as your work setting compare to the things you like least about Downtown Norfolk as your work setting?
Implication

The respondent workforce is satisfied with Downtown Norfolk as a place to work and somewhat satisfied with it as a place to live and play, but they are not willing to recommend it (including those who live there). How can we turn these detractors into promoters?
Areas of Improvement
Respondents rate some Downtown Norfolk attributes high for both importance and performance, but there are some gaps that should be addressed.
Safety, Ease of Travel and Variety of Dining Options Were Rated As the Most Important Attributes in Making a Downtown Appealing

- Is safe: 8% (bottom), 87% (top)
- Easy to travel to the downtown area: 27% (bottom), 66% (top)
- Offers a variety of dining options: 32% (bottom), 59% (top)
- Has a variety of shopping options: 37% (bottom), 46% (top)
- Has a variety of employment options: 29% (bottom), 53% (top)
- Offers art and cultural opportunities, such as museums, symphonies, theaters and galleries: 34% (bottom), 44% (top)
- Easy to get around by biking or walking, that is - you don’t need a car: 31% (bottom), 46% (top)
- Has accessible public transportation: 27% (bottom), 43% (top)
- Embraces creativity: 32% (bottom), 34% (top)
- Has a variety of live music entertainment choices: 34% (bottom), 32% (top)
- Offers outdoor recreation options: 37% (bottom), 29% (top)
- Is culturally and/or ethnically diverse: 30% (bottom), 32% (top)
- Has a rich history: 32% (bottom), 24% (top)
- Offers quality housing options: 25% (bottom), 28% (top)
- Offers higher education options, such as universities and technical schools: 25% (bottom), 47% (top)

Q5. How important is each of the following in making a downtown area attractive or appealing to you?

n = 540

Percentages represent top two box ratings of “4” and “5.”
Variety of Dining Options and Rich History Were Cited As the Top Attributes That Describe Downtown Norfolk Well

Q6. How well do you think each of these attributes describes Downtown Norfolk?

n = 540

Percentages represent top two box ratings of “4” and “5.”
Safety and Ease of Travel Present the Largest Gaps Between Importance and Attributes That Describe Downtown Norfolk Well

<table>
<thead>
<tr>
<th></th>
<th>Importance</th>
<th>Description of Norfolk</th>
<th>Gap</th>
</tr>
</thead>
<tbody>
<tr>
<td>Is safe</td>
<td>95%</td>
<td>54%</td>
<td>-41%</td>
</tr>
<tr>
<td>Easy to travel to the downtown area</td>
<td>93%</td>
<td>50%</td>
<td>-43%</td>
</tr>
<tr>
<td>Offers a variety of dining options</td>
<td>91%</td>
<td>71%</td>
<td>-20%</td>
</tr>
<tr>
<td>Has a variety of shopping options</td>
<td>83%</td>
<td>58%</td>
<td>-25%</td>
</tr>
<tr>
<td>Has a variety of employment options</td>
<td>82%</td>
<td>49%</td>
<td>-33%</td>
</tr>
<tr>
<td>Offers art and cultural opportunities, such as museums, symphonies, theaters and galleries</td>
<td>78%</td>
<td>68%</td>
<td>-10%</td>
</tr>
<tr>
<td>Easy to get around by biking or walking, that is – you don’t need a car</td>
<td>77%</td>
<td>54%</td>
<td>-23%</td>
</tr>
<tr>
<td>Has accessible public transportation</td>
<td>70%</td>
<td>64%</td>
<td>-6%</td>
</tr>
<tr>
<td>Embraces creativity</td>
<td>66%</td>
<td>44%</td>
<td>-22%</td>
</tr>
<tr>
<td>Has a variety of live music entertainment choices</td>
<td>66%</td>
<td>45%</td>
<td>-21%</td>
</tr>
<tr>
<td>Offers outdoor recreation options</td>
<td>66%</td>
<td>34%</td>
<td>-32%</td>
</tr>
<tr>
<td>Is culturally and/or ethnically diverse</td>
<td>62%</td>
<td>52%</td>
<td>-10%</td>
</tr>
<tr>
<td>Has a rich history</td>
<td>56%</td>
<td>71%</td>
<td>15%</td>
</tr>
<tr>
<td>Offers quality housing options</td>
<td>53%</td>
<td>35%</td>
<td>-18%</td>
</tr>
<tr>
<td>Offers higher education options, such as universities and technical schools</td>
<td>47%</td>
<td>54%</td>
<td>7%</td>
</tr>
</tbody>
</table>
This map helps illustrate how satisfaction and perceived performance on attributes can highlight DNC’s strengths and opportunities.

Opportunity Map

- **GROWTH OPPORTUNITY**
  - Opportunities for improvement
  - Continue to invest and develop to build strength

- **BUILD AND MAINTAIN**
  - Should not invest resources here
  - A reserve that can “protect”
# Opportunity Map

## Attributes by Quadrant

### Growth Opportunity
- Is safe
- Easy to get around by biking or walking, that is - you don’t need a car
- Easy to travel to the downtown area
- Has a variety of employment options

### Build and Maintain
- Offers a variety of dining options
- Offers art and cultural opportunities
- Has a variety of shopping options

### Save Resources
- Offers higher education options
- Is culturally/ethnically diverse
- Has a variety of live music entertainment choices
- Embraces creativity
- Offers quality housing options
- Offers outdoor recreation options

### Reserve Strength
- Has a rich history
- Has accessible public transportation

---

Attributes by quadrant. Build and maintain are strengths that are important. Reserve strengths tend to be niche attributes, important to small market segments. Save resources are limitations, but not as important to the market. Growth opportunities are important to respondents but not rated highly: this is where you focus for the greatest ROI.
Focus on the areas with the largest gaps that will offer the highest return on investment. These four areas are safety, ease of getting around by biking or walking, ease of travel to the downtown area and variety of employment options.
Satisfaction Drivers
Drivers of satisfaction with Downtown Norfolk as a place to live, work and play vary but one attribute remains consistent across the board: bikeability and walkability.
Regression Analysis

Statistical regression analysis models data to explore and identify any linkages between how people rated overall measures related to specific performance variables. This process looks for relationships or predictors where a higher rating on an attribute positively or negatively impacts the overall rating.
Reading Regression Analysis

The closer you get to 1.0 the greater the impact or causality.

“If this, then that…”
Three of the Fifteen Attributes Are Drivers of Overall Perception of Downtown Norfolk

- Is safe
- Easy to travel to the downtown area
- Offers a variety of dining options
- Is culturally and/or ethnically diverse
- Offers art and cultural opportunities
- Has a variety of shopping options
- Variety of live music entertainment choices
- Has accessible public transportation
- Has a variety of employment options
- Easy to get around by biking or walking
- Has a rich history
- Offers higher education options
- Offers outdoor recreation options
- Embraces creativity
- Offers quality housing options

Higher rating on attribute positively impacts overall satisfaction

Overall perception of Downtown Norfolk

n = 540
Bikeability and Walkability Are Drivers of Satisfaction with Downtown Norfolk As a Place to Live, Work and Play

**To Live**
- Offers quality housing options
- Is Safe
- Easy to get around by biking or walking
- Has a rich history

**To Work**
- Easy to travel to the area
- Offers a variety of dining options
- Easy to get around by biking or walking
- Offers art and culture
- Variety of employment options

**To Play**
- Offers a variety of dining options
- Easy to get around by biking or walking
- Has accessible public transportation
- Offers art and culture
Drivers of Overall Satisfaction Based on Generations

**Millennials**
- Easy to get around by biking or walking
- Has a variety of employment options

**Generation X**
- Offers a variety of dining options

**Baby Boomers**
- Is safe
Drivers of Overall Satisfaction Based on Segmentations

**Live in Norfolk**
- Offers a variety of dining options
- Is safe

**Live Outside Norfolk**
- Offers a variety of dining options
- Is safe
- Easy to get around by biking or walking
- Has a variety of shopping options

**Positive Perception**
- Is safe
- Easy to travel to the downtown area

**Negative Perception**
- Has a variety of shopping options
Possible Ways to Increase Satisfaction with the Drivers, Also Known As “The Drivers of the Drivers”

- Offers a Variety of Dining Options
  - Respondent Workforce Suggestions Include:
    - Increase non-chain local dining
    - Allow food trucks in Downtown Norfolk

- Easy to Get Around by Biking or Walking
  - Respondent Workforce Suggestions Include:
    - More bike lanes
    - Safer conditions
Implication

Safety, a variety of dining options and ease of being able to get around by biking or walking are seen as your greatest drivers of satisfaction both overall and by different segments; focusing on these will in turn drive up overall satisfaction with Downtown Norfolk as a place to live, work and play.
Panel
Approximately 200 members of the respondent workforce are interested in being a part of the Downtown Norfolk panel.
35% of Respondents Are Interested in Participating in the Panel

40. Would you be interested in possibly participating on such a panel, if we decide to form one?

n = 540
### Participation in the Panel Varies by Segmentation

<table>
<thead>
<tr>
<th>Group</th>
<th>Percent</th>
<th>Count</th>
</tr>
</thead>
<tbody>
<tr>
<td><strong>Generations</strong></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Millennials</td>
<td>48%</td>
<td>41</td>
</tr>
<tr>
<td>Generation X</td>
<td>41%</td>
<td>98</td>
</tr>
<tr>
<td>Baby Boomers</td>
<td>25%</td>
<td>45</td>
</tr>
<tr>
<td><strong>Perception</strong></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Negative</td>
<td>35%</td>
<td>51</td>
</tr>
<tr>
<td>Positive</td>
<td>35%</td>
<td>137</td>
</tr>
<tr>
<td><strong>Time Worked</strong></td>
<td></td>
<td></td>
</tr>
<tr>
<td>0-5 years</td>
<td>37%</td>
<td>90</td>
</tr>
<tr>
<td>6-10 years</td>
<td>42%</td>
<td>55</td>
</tr>
<tr>
<td>10+ Years</td>
<td>27%</td>
<td>43</td>
</tr>
<tr>
<td><strong>Residence</strong></td>
<td></td>
<td></td>
</tr>
<tr>
<td>In Norfolk</td>
<td>42%</td>
<td>85</td>
</tr>
<tr>
<td>Outside Norfolk</td>
<td>31%</td>
<td>103</td>
</tr>
</tbody>
</table>

\( n = 540 \)
Implication

Over a third of the respondent workforce are interested in helping the Downtown Norfolk Council. Involve them. Engage them in an assignment related to one of the issues uncovered in this study.
Summary
Summary

1. Participants have an overwhelming reliance on driving alone to work - single occupant vehicle (SOV) commuting.
   - With 60% of the respondent workforce residing outside of Norfolk and satisfaction with public transportation being below average, workers do not feel like they have any other option but to drive alone.

2. Outside of work, Downtown Norfolk is most often used for restaurants and shopping.
   - The average number of dinners eaten in Norfolk in a 30-day period is 3.4, which is up from 2.6 in 2010. Celebrate your success in knowing that more workers are eating dinner out more often. The average number of lunches eaten at a restaurant or take-out in a 30-day period is 11.2. Focus your attention on lunch specials, as workers frequent these options most often.

3. Workers are most satisfied with Downtown Norfolk as the setting for their job and think adding non-chain restaurants will complement the area well.
   - Recall that most respondents’ dining habits have remained the same over time. Non-chain food options and food trucks may be the driving force that increases the amount of money spent per week on dining in Downtown Norfolk.

4. A majority of respondents have a positive overall perception of Downtown Norfolk as a place to work, but fewer would recommend it as a place to live or play.
   - The respondent workforce is satisfied with Downtown Norfolk as a place to work and somewhat satisfied with it as a place to live and play, but they are not willing to recommend it (including those who live there). How can we turn these detractors into promoters?
Summary

5. Respondents rate some Downtown Norfolk attributes high for both importance and performance, but there are some gaps that should be addressed.
- Focus on the areas with the largest gaps that will offer the highest return on investment. These four areas are safety, ease of getting around by biking or walking, ease of travel to the downtown area and variety of employment options.

6. Drivers of satisfaction with Downtown Norfolk as a place to live, work and play vary but one attribute remains consistent across the board: bikeability and walkability.
- Safety, a variety of dining options and ease of being able to get around by biking or walking are seen as your greatest drivers of satisfaction both overall and by different segments; focusing on these will in turn drive up overall satisfaction with Downtown Norfolk as a place to live, work and play.

7. Approximately 200 members of the respondent workforce are interested in being a part of the Downtown Norfolk panel.
- Over a third of the respondent workforce are interested in helping the Downtown Norfolk Council. Involve them. Engage them in an assignment related to one of the issues uncovered in this study.
Thank You