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INTRODUCTION

ABOUT NORTH STAR DESTINATION STRATEGIES

North Star Destination Strategies comprises over two dozen talented individuals dedicated to growing community brands through integrated marketing solutions. North Star offers communities a combination of research, strategy, creativity and action. This process – called Community BrandPrint – provides direction for the community's brand development, like a blueprint guides the construction of a home. And just like a blueprint, the priorities and targets of each Community BrandPrint are stated in clear and unambiguous language. The resulting brand personality is as revealing as an individual's fingerprint, and just as unique.

ABOUT THE RICHMOND RESEARCH TO STRATEGY BRANDPRINT

Richmond Main Street Initiative and Richmond Mayor Tom Butt's office contracted with North Star for the first half of the BrandPrint Process: Research to Strategy. Through our comprehensive research process, North Star determined Richmond's most relevant and distinct promise. From that promise, we created a strategic brand platform, or DNA, intended to generate a brand position in the minds of residents, visitors and businesses. This strategic positioning should influence all creativity and action on the part of Richmond moving forward.

This process is divided into two stages: Research and Strategy.

EXECUTIVE SUMMARY

KEY RESEARCH FINDINGS

Differentiators: Richmond is home to the most shoreline along the Bay and the most completed trails of the Bay Trail. The community enjoys both a waterfront setting and rolling hills among which many parks are located. Unlike some neighbors there is a strong history of productivity and resilience in Richmond, particularly with the Rosie the Riveter National Park celebrating the nationwide WWII efforts of women and minorities. That Can-do spirit remains today as the progressive city is always willing to tackle tough issues that other cities avoid. The community is innovative in its approach to policing and neighborhood revitalization and safety, as well as many others. Richmond is centrally located near major transit routes for rail and road as well as an active Port. Richmond is the end of the line for BART and will benefit from a ferry to San Francisco in the coming year. Many Bay Area corporations have found Richmond to be affordable and business friendly, particularly for manufacturing and distribution purposes. And many tech firms are discovering the space and freedom and affordable rents they need to thrive in the Bay Area. Many consider the diverse community of Richmond to be the last bargain on the Bay.

EXECUTIVE SUMMARY

KEY RESEARCH FINDINGS

Challenges: Richmond suffers from long-held negative perceptions (earned) for crime and is considered dangerous and unsafe (gang turf wars). Political dysfunction is also part of its primary reputation. People do not associate Richmond as a waterfront community despite its distinction with the most miles of shoreline. Weak schools and lack of job growth are major challenges for the city. Many fear gentrification here. There is considerable poverty in Richmond, and many are concerned about unattractive entries and blight. The community has struggled with job growth. Those working in Richmond at jobs with higher wages (Chevron, Craneway, etc.) often choose to live elsewhere. Young professionals are not drawn to Richmond, with its lack of amenities, entertainment, and reasons to visit. Housing stock in Richmond is not varied. Chevron is recognized as both an asset and as a challenge, but the relationship between the City and Chevron is strained and requires improvement.

EXECUTIVE SUMMARY

KEY RESEARCH FINDINGS

Opportunities: Richmond will be the home of the Berkeley Global Campus, and just the proximity to the main Berkeley Campus is an advantage and an opportunity. Communicating broadly about Richmond's waterfront is key to its reputation (beyond singular negatives). Available sites and buildings is a compelling economic development message with many Bay Area already discovering the benefits of being located in this community with the ready locations for their operations. Along with waterfront development, a vibrant downtown is a great opportunity for the community. The diversity here is attractive and offers the type of Bay Area community many were initially drawn to. There is an authenticity here that has not been whitewashed. Continuing to communicate the advantages for start-ups and entrepreneurs should prove fruitful for Richmond. Affordability is a compelling message for business and potential residents. Richmond needs to invest in marketing and PR and get people to visit to discover how close and enjoyable the community is. The future ferry will open significant opportunities as well.

EXECUTIVE SUMMARY

STRATEGY

Research data was analyzed for trending insights that hone in on the Richmond story. These insights were funneled into a strategic brand platform, also known as your strategic DNA. Just as an individual's DNA influences everything from how that person looks to how that person acts (as well as their health and vibrancy), Richmond's DNA should be the foundational touchstone for all positive planned action in your city from marketing to infrastructure to policy development.

Target Audience:

For people seeking a Bay Area existence without being cramped or crushed by cost,

Frame of Reference:

Richmond, with the most miles of shoreline along the East Bay,

Point-of-Difference:

is a diverse community with a steel resolve

Benefit:

so great ideas are fulfilled on the home front of the next greatest generation.

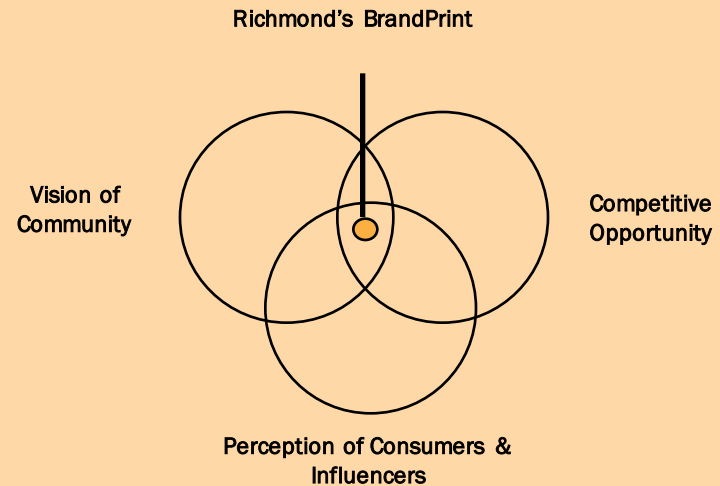
RESEARCH

WHERE THE BRAND HAS BEEN

This research stage addresses the Richmond's current brand positioning. We assess the environment; demographics and psychographics of residents; perceptions of visitors, residents, and stakeholders; current communications and the competition. Most importantly, we gather firsthand information about Richmond from our in-market experience.

We are looking for current attitudes regarding Richmond. We are also trying to spot behavioral trends that exist around the existing Richmond brand. This stage is critical because it uncovers the relationship between three factors: the community's physical qualities, communication materials, and the position the community holds in the minds of its consumers.

12 qualitative and quantitative studies comprise the research phase of the BrandPrint.



RESEARCH INSTRUMENTS

Community

- **Research & Planning Audit**
- **Communication Audit**
- **Situation Analysis**
- **Familiarization Tour**
- **Stakeholders/Residents**
 - Key Stakeholder Interviews
 - Stakeholder Focus Groups
 - Undercover Interviews
- **Vision Survey**
- **Community Survey**
- **Brand Barometer**
- **Tapestry Resident and Region**

Consumers

- **Perception Study**
(Qualitative) Interviews about Richmond with regional officials and professionals
- **Consumer Awareness & Perception Study**
(Quantitative) visitors & non-visitors to Richmond from San Francisco-Oakland-Hayward MSA
- **Top Business Prospects**
- **Online Brand Monitoring**
- **Tapestry Consumer**

Competition

- **Competitive Positioning Review**
- **Brand Message Assessment**
- **Perception Study**
(Qualitative) Interviews about competitors with regional officials and professionals
- **Consumer Awareness & Perception Study**
(Quantitative) Visitors & non-visitors

MATERIALS AUDIT

Purpose

The materials audit provides an overview of past research, marketing, promotions and education done on behalf of Richmond. Before we can determine where the new identity should go, we must understand where you have been.

Methodology & Results

A comprehensive library of materials were gathered representing economic development, tourism, resident recruitment and education, special programming, past research, studies and planning, etc. All materials were catalogued and reviewed to identify areas of recurring themes as well as areas of conflicting or divergent messaging.

MATERIALS AUDIT

MATERIALS REVIEWED:

As part of the Research and Materials Audit, prior to the In-Market Study

Richmond Local Attractions

- Richmond Memorial Civic Center-Revitalization Project Public Art Program Book
- Rosie the Riveter/WW2 Home Front National Historical Park-General Management Plan Summary book

Richmond Chamber of Commerce

- North Star Information Richmond RCVB

Richmond Convention and Visitors Bureau

- Example News Letter & Clickable Photos
- Sample Events invites (5)
- Copy of Heritage & History Magazine with Richmond CVB ad in magazine
- Copy of Sunset Magazine with Richmond CVB ad in magazine
- Copy of California Vacation Guide 2015 with Richmond CVB ad in magazine
- Copy of San Francisco Business Times Ad-Supplement with Richmond CVB ad on front page
- San Francisco tourism ad flyer with Richmond CVB ad on flyer
- Richmond Tourism Marketing District-Management District Plan Pamphlet
- Richmond CVB Tourism Advisory Board Members Contact Information
- Public Relations Activity Report-January/February 2014
- City Council PowerPoint 2015
- Brand Driver Profile: Tourism Document

MATERIALS AUDIT

MATERIALS REVIEWED:

As part of the Research and Materials Audit, prior to the In-Market Study. The Mayor's office and others provided numerous items to review including but not limited to the following.

Downtown Richmond

- Market Hub-Concept Discussion (07/13/2015)
- Historic Map of Downtown (07/13/2015)

Richmond Main Street Initiative

- E-blast Newsletter teaser (07/13/2015)

Richmond Visitor's Info

- Richmond Visitor's Map
- Visitor Packet & Local Info

Miscellaneous

- Mountain Hardwear Employee Store Guest Pass
- Lodging in Richmond Tourism Marketing District with owner contact info. Spreadsheet
- San Francisco Media Reception Pitch 2014

Souvenirs

- Rosie the Riveter doll key-chain
- Rosie the Riveter fan
- Richmond CVB Tote Bag (2)

IN-MARKET STUDY

Purpose

The purpose of the In-Market Study is to gain an understanding of the perceptions and attitudes of Richmond residents and stakeholders towards their community and to experience first-hand what makes it a unique destination for visitors, residents or business prospects.

Methodology & Results

The following summary reflects observations and input received during the North Star In-Market visit, which took place from July 27-31, 2015. The information is not meant to be all-inclusive, but rather highlights the most common themes experienced, uncovered and voiced on the trip. This includes an area familiarization (FAM) tour, stakeholder focus groups, stakeholder one-on-one interviews, undercover interviews, mystery shopping and local community one-on-one perception interviews.

ASSETS

Shoreline, waterfront

Centrally located

History, Rosie

Great parks and Bay Trail

Berkeley Global Campus

Available sites/buildings

Policing model, reduced

crime, ONS

Chevron

Road, rail, port, ferry, BART

CHALLENGES

Weak schools

Political dysfunction

Crime

Chevron

Gentrification

Hilltop Mall

Blight

Negative perceptions

Poverty

MISSING

Nightlife; gathering spots
Things to do (incl families)
PIO, Public relations
Identity
Awareness
Jobs
Civility
Groceries and retail
Young professionals

OPPORTUNITIES

Berkeley Global Campus
Manufacturing, distribution
Waterfront development
Vibrant Downtown
Affordable sites/buildings
Chevron relationship
Identity, PR
Improved schools
Innovative ideas

IN-MARKET

Voices From the Research

- *“We are overshadowed by crime and violent crime.”*
- *“Even risk takers cannot see a ready return on investment because of crime.”*
- *“Any time people start a sentence about Richmond it is with crime rate.”*
- *“Perception as unsafe is different from reality.”*
- *“Much of Richmond’s reputation is the core district of the city.”*
- *“Residents think it is unsafe here. North Richmond thought crime was increasing and the police reported two auto break-ins last month. Down significantly.”*
- *“Public image is poverty and ghetto and violence and crime in Chevron.”*
- *“My parents were terrified of me moving here.”*
- *“Crime ridden, but no more than anywhere else.”*
- *“Reputation from the outside is a gritty and industrial city with crime...don’t think about the assets.”*
- *“Richmond gets the ‘gasp’. You live where?”*
- *“Change the conditions so people feel safe here.”*
- *“We had no idea all of this was here...all you ever read about is crime.”*
- *“Richmond is consistently misperceived as high crime. People from around the Bay Area looking for housing have never explored Richmond. They often feel like they discovered something hidden.”*
- *“I think because of jail and drugs and crime, all of the cool things that we have in Richmond are never expressed to these younger generations.”*
- *“Drama sells. Richmond has poverty so Richmond has drama. The root issues are still there.”*

IN-MARKET

Voices From the Research

- *“Macy’s is there but they don’t put out the best merchandise because so much is stolen.”*
- *“Residents don’t shop here.”*
- *“I can count on one hand the things to do here.”*
- *“People are apologetic that anyone has to work there.”*
- *“Long time reputation has held us back.”*
- *“Richmond needs to change and have a better quality of life and health.”*
- *“They need to believe that change can happen.”*
- *“Richmond needs to be honest and recognize what needs to improve.”*
- *“People tend to settle for Richmond rather than choose Richmond.”*
- *“Locals like local events not drawing others in.”*
- *“There is a resentment of carpetbaggers who come and make money on us.”*
- *“This is the ideal place if you are starting out with no or young kids.”*
- *“Schools are a detriment to staying here.”*
- *“Tech recession forced many into teaching. There is no passion.”*
- *“Part of the reason I moved away is the schools. Families are concerned with the schools. Percentage of Chevron employees that live in Richmond is really low.”*
- *“Need to glorify the richness in character here. Education programs supported by community, arts, works programs.”*
- *“Perfect location, twenty minutes to anywhere.”*
- *“Pixar started here, Kaiser, Bio Rad. Figure out an angle for some of the companies that came here to claim it.”*

IN-MARKET

Voices From the Research

- *“It should be a gold rush for new businesses and people in commercial, particularly along the water. If it’s not a destination, no one will use the ferry.”*
- *“Reputation is poisoned by the refinery. Emissions blow over San Pablo Bay; we are not poisoning San Francisco.”*
- *“In the old days the refineries were considered assets. But now, they are detriments. Refinery workers live elsewhere making lots of money.”*
- *“From the Bay Area...look at refinery as a convenient thing to look down on.”*
- *“We are a working class city.”*
- *“We were a company town in the worst sense of the word. Now we are challenging underlying social issues from high crime, to poverty, tough schools, and environmental issues.”*
- *“People use Chevron when they need them, hate them otherwise with hand out.”*
- *“Chevron is the elephant in the room.”*
- *“Without Chevron this city wouldn’t make it.”*
- *“General public appreciate Chevron. Some leaders do not.”*
- *“Without Chevron we are Detroit.”*
- *“The big picture is that Chevron thinks that they own this town because they were here first. We build up around them. So they have historically had a larger influence than anyone else in this city...but we need to learn to live together on a different level.”*
- *“Depends on who you talk to, whether or not Chevron is an asset. Their revenue generation relative to how much they give to the community and how they attempt to influence local politics make it not an asset.”*
- *“This is a refinery city, a refinery corridor...there is no way around it.”*

IN-MARKET

Voices From the Research

- *“Our economy does not support the rent it takes to get developers to construct those buildings.”*
- *“If you put the wrong building on a site, you can’t undo that.”*
- *“We need a dedicated PIO to highlight the good works in Richmond.”*
- *“Last affordable place to live in the Bay Area despite reputation.”*
- *“Whole new generation of people out there that see Richmond as an opportunity (business people).”*
- *“We are easier to deal with than Berkeley, Walnut Creek, and Marin County.”*
- *“Creating a stable business regulatory environment...know the rules coming in. The rules create a level playing field and certainty. What is coming out of Richmond does not scare businesses.”*
- *“Outsiders won’t take a chance and won’t build relationships. Need respect.”*
- *“We aren’t the way we look to people outside. Twenty cars in the front yard don’t know the law until someone says it.”*
- *“Richmond feels intimate in a way that Oakland doesn’t; it’s got a small town feel and the way people interact with each other...friendship.”*
- *“People in Richmond are very real and get right to what they’re talking about. No fluff- real genuine and honest.”*
- *“People are generally guarded and waiting for something to go wrong.”*
- *“Without conflict you never have progress.”*
- *“Change divides Richmond. There’s a dissenting option and there’s a lot of anger and fluff.”*
- *“There are really great things here. Built on how you’ve survived. Richmond has been a tough place to live for quite some time.”*

IN-MARKET

Voices From the Research

- *“Council is divided between socialist progressive politics.”*
- *“One group wants to make Richmond a showcase of socialistic policies.”*
- *“City Council beats up on Chevron and banks.”*
“Dogmatic ideological unfriendliness toward business from part of Council.”
- *“People expect city money to be misspent.”*
- *“Council tends to sharply divide.”*
- *“Richmond is a political experiment...fascinating and disturbing.”*
- *“Things get tried here, outside of the mainstream.”*
- *“Petrie dish of all kinds of interesting and innovative social experiments in educations, government, and social services.”*
- *“Divisiveness at the political level is so unhelpful on what the city needs to accomplish. It discourages people from working here.”*
- *“Politics is a blood sport in the city.”*
- *“Diverse political opinions make it difficult to get speed and efficiency. At some point we have to expeditious.”*
- *“Political parties have used the media against each other to manipulate opinions that it has created a reputation that it is unsafe.”*
- *“Some leaders take green, non-negotiable position.”*
- *“Start: serving the public, not yourself. Stop: dirty laundry.”*
- *“Can’t rely on Council to enact legislation that is friendly.”*
- *“Mind altering chemical spaced systems, chemtrails. Council discussed this.”*
- *“Political culture is way more divisive than necessary.”*

IN-MARKET

Voices From the Research

- *“California is starting to look like Richmond.”*
- *“Brooklyn is what Richmond should become.”*
- *“Bay Area is shocking segregated, but not here...good example here but reasons for messiness: lots of backgrounds, and income, living in close proximity and finding a common ground...work towards a community to be proud of.”*
- *“White women running and biking. Very different scene than just a few years ago, might not be broadcasted but message is getting through.”*
- *Important to acknowledge that violence – public health – if you’re a person of color, violence is closer to your daily life than it you’re not. Addressing it as a public health issue is super important.”*
- *“No one is going to call it gentrification with Latinos relocating. Brought stability to Richmond.”*
- *“San Francisco is the most racist urban city in the country. Voicing concern about becoming what San Francisco is. Monolithic, white, wealthy, tech, young, driving out all of the culture and diversity.”*
- *“The techie world doesn’t include us, there is no reason to consider it.”*
- *“Employees were afraid at first, but comfortable with reality.”*
- *“The City Manager brought in innovative thinkers.”*
- *“You cannot have an interested industry and tell them it will take five years or more, it’s not efficient.”*
- *“Residents lack motivation. People feel the city owes them favors and expect a handout.”*
- *“You have to be open minded to come here, ton of other place to live that are better.”*

IN-MARKET

Voices From the Research

- *“No mercy for this town when it comes to the press or the light shed on the city...but we feed the beast.”*
- *“We have no place to gather other than our churches. How can you be a community when you can’t get tougher?”*
- *“Hidden jewel. Get involved and expand here soon, while you can afford it.”*
- *“Prosperity skips Vallejo, Richmond, Oakland, and Pittsburg.”*
- *“Gritty exciting place for people who want to make a change and thrive here. A distinct attitude of rallying, we are the place for the underdog.”*
- *“Despite Chevron, Richmond is a breath of fresh air in the Bay Area, a real community.”*
- *“Same things that make it a tough place make it an attractive place.”*
- *“I stayed here because they have my back.”*
- *“Richmond is a place you can reinvent yourself...Families can start anew here. Still on the Bay but you can kind of reset and start over again in Richmond.”*

VISION SURVEY

Purpose

The purpose of the Vision Survey is to gather qualitative information/perceptions regarding Richmond from stakeholders. What do they like and dislike about their community? How would they make it better? What kind of things do they associate with Richmond? After all, no one knows Richmond better than those who form its backbone.

Methodology & Results

To understand stakeholder perceptions, a Vision Survey was emailed to key stakeholders in the community identified by the brand drivers. All questions were open-ended, allowing for a qualitative measure of stakeholder perceptions. Many of the questions in the survey focused on Richmond's direct strengths, weaknesses, opportunities and threats. Other questions focused on brand perception, allowing the respondent to translate the intangible elements of a brand into a tangible noun.

168 stakeholders responded to the survey. The top answers most reflective of all stakeholders are shown on the following pages.

See **Appendix A** on the Final Report CD for the complete Vision Survey results.

Community Leader Perceptions

DESCRIBING RICHMOND

When you first think of Richmond, which three words come to mind?

- Crime
- Beautiful shoreline/waterfront/Bay
- Chevron

Describe Richmond to someone who has never heard of it before.

- Beautiful/Bay/waterfront
- Diverse
- Historic (WWII/Rosie)
- Improving community (safety/perceptions)

Community Leader Perceptions

DESCRIBING RICHMOND

What are Richmond's three greatest assets?

- Shoreline/Bay/waterfront
- Location
- Parks
- Affordable

What is Richmond's best kept secret?

- Bay/shoreline/beautiful
- Parks
- Point Molate
- Affordable housing

Community Leader Perceptions

DESCRIBING RICHMOND

What surprises people about Richmond?

- Beautiful/shoreline/marina
- Safer/lower crime rate
- Unique neighborhoods
- Arts/culture

What differentiates Richmond from other areas in the Bay Area?

- Affordable
- Shoreline
- History
- Location, ease of access to Bay Area

Community Leader Perceptions

EXTERNAL MESSAGES

How would others in the Bay Area describe Richmond?

- Dangerous/unsafe/crime ridden
- Chevron
- Poor/bad schools
- Industrial

If you were in charge and could broadcast one message about Richmond, what would it be (i.e. what do people not know that they should)?

- Rebirth/Renaissance/potential
- Beautiful/Bayfront/shoreline
- Safer than you think
- Great parks
- Great location

Community Leader Perceptions

DOWNTOWN RICHMOND

Describe Downtown Richmond (positives, negatives, potential).

- Positive
 - Old Town infrastructure/personality
 - Potential for mixed use development
 - Vacancies
 - BART/Access
- Negatives
 - Needs rebirth and investment (trees, more businesses, attractions)
 - Crime
 - Lack of awareness
 - Vacancies

Community Leader Perceptions

RICHMOND BUSINESS

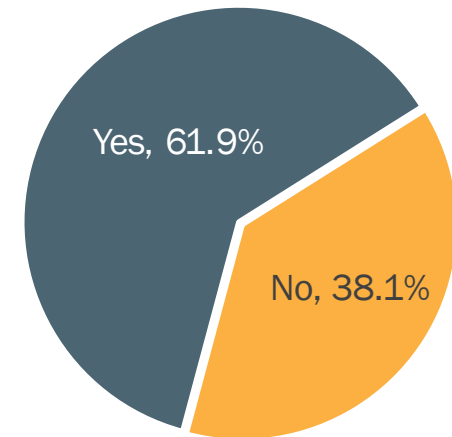
Do you consider Richmond to be business friendly? Why or why not?

Why?

- More affordable place to start a business
- Small businesses are moving to Richmond
- Low real estate and rent costs
- Welcoming

Why Not?

- Business license fee is high
- Not enough incentive programs



Community Leader Perceptions

DESCRIBING RICHMOND

In your opinion, what is missing in Richmond?

- Good schools
- More shopping options
- Appealing downtown (walkable/vibrant)
- Restaurants

In your opinion, what will attract more young people to Richmond?

- Affordable housing
- Better schools
- Job opportunities

Community Leader Perceptions

DESCRIBING RICHMOND

What unites the citizens of Richmond?

- Pride
- Strong sense of community
- Neighborhoods
- Opposition to Chevron

If you could change one thing (add, remove, or change something) about Richmond that would make a positive difference for its future, what would it be?

- Schools
- Remove or replace Chevron
- Become more business friendly/attract more business
- Reduce crime

Community Leader Perceptions

TARGET AUDIENCES

Please identify attributes in or about Richmond that attract most...

- Residents
 - Affordability (housing)
 - Weather/climate
 - Neighborhoods
- Visitors
 - Parks/shoreline
 - Rosie the Riveter
 - Craneway Pavilion
- Business and Industry
 - Available/affordable space
 - Access to transportation
 - Location

Community Leader Perceptions

COMPETITOR COMMUNITIES

From your perspective, please identify which 3 cities/regions are Richmond's main competitors for economic development. Please explain WHY for each choice.

- Oakland
 - Business diversity & diversity
 - Port
 - Location
- Berkeley
 - Innovation
 - Good education
 - Incentives
- Emeryville
 - Progressive
 - Commercial/residential development
 - Transportation
- El Cerrito
 - Nicer/curb appeal
 - Shopping options
 - Proximity

Community Leader Perceptions

COMPETITOR COMMUNITIES

What are the greatest challenges currently facing Richmond?

- Crime
- Schools
- Political factions/environment
- Attracting business

In your opinion, if Richmond could make one investment to spur economic growth, what would that investment be?

- Business incentives
- Better schools
- Revive downtown

Community Leader Perceptions

COMPETITOR COMMUNITIES

What adjective first comes to mind when thinking about the following communities?

- Oakland
 - Crime
 - Growing/improving
 - Vibrant/hip
- Berkeley
 - Progressive
 - University/education/college town
 - Quirky/fun
- Emeryville
 - Shopping/retail
 - Business friendly
 - Over developed/crowded
- El Cerrito
 - Boring/sleepy
 - Shopping
 - Bedroom community

Community Leader Perceptions

COMPETITOR COMMUNITIES

What adjective first comes to mind when thinking about the following communities?

- Albany
 - Good schools/educated
 - Affluent/expensive
 - Boring
- San Francisco
 - Expensive
 - Booming/thriving
 - Fun
- San Rafael
 - Wealthy/rich/expensive
 - Marin County
 - White
- Alameda
 - Isolated
 - Nice/quaint/cute
 - Good schools
 - Bedroom community

Community Leader Perceptions

COMPETITOR COMMUNITIES & DESCRIBING RICHMOND

How is Richmond different from all of the communities listed in the previous question?

- Potential
- Crime
- Worse schools
- Affordable

What is most important to Richmond's identity? Without _____ , Richmond would lose its essence.

- History/WWII
- Shoreline
- Sense of community
- Chevron

Community Leader Perceptions

EXTERNAL IMPACTS

In your opinion, what aspect of Richmond leaves the strongest positive impression and strongest negative impression on visitors and newcomers to the community?

- Positive
 - Shoreline/waterfront
 - Parks/Bay Trail
 - People/community/neighbors
- Negative
 - Crime
 - Poor/unsafe neighborhoods
 - Blight

Community Leader Perceptions

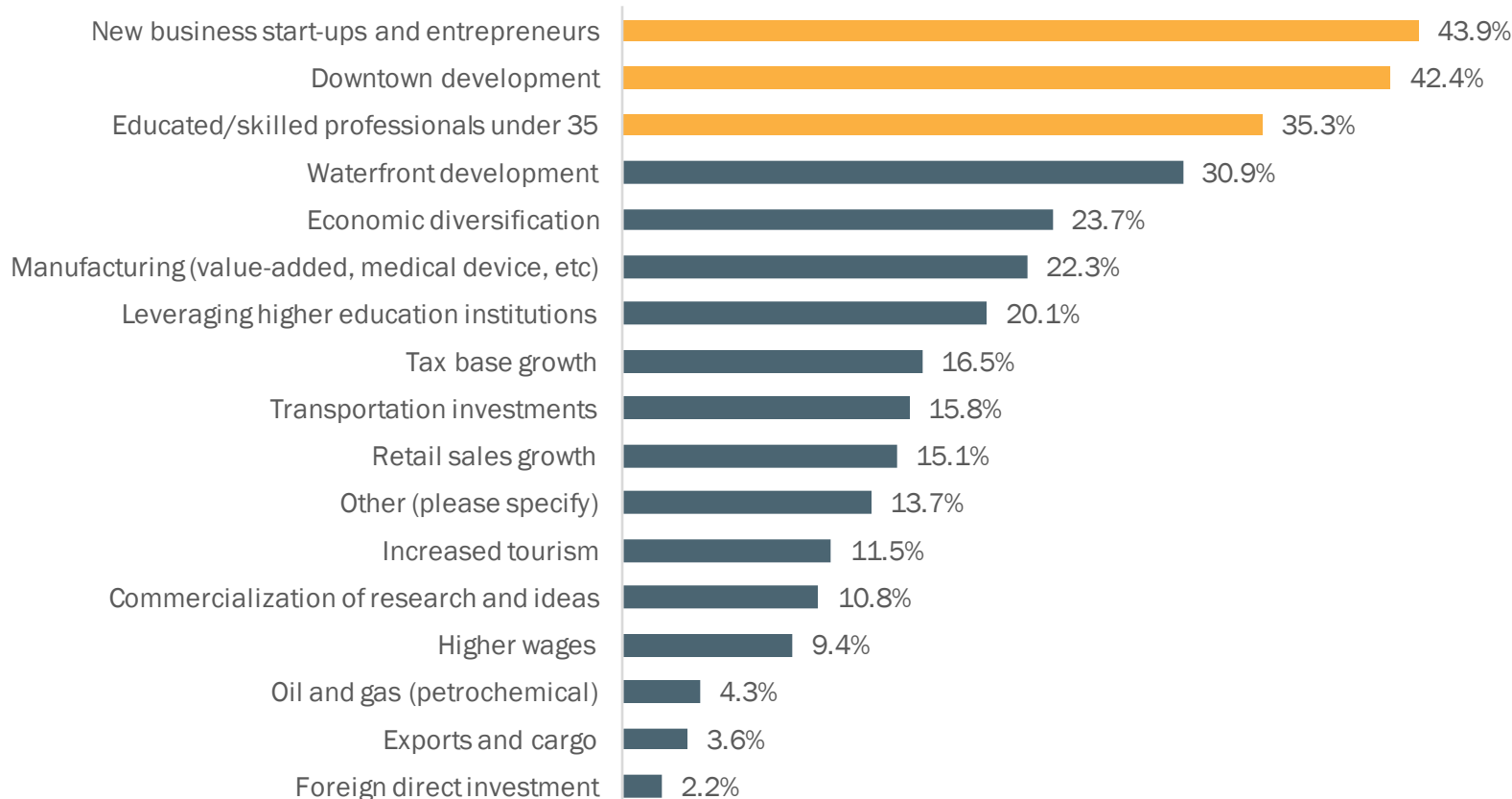
GREATEST OPPORTUNITY

In your opinion, what do you consider Richmond's greatest opportunities for growth and improvement?

- Business attraction (incentives, opportunities for small businesses, green)
- Revitalized downtown
- Affordable housing/increase in housing stock
- Undeveloped land/available land
- Access, emphasis and development around the Bay Area/shoreline
- More jobs
- Better schools
- Berkeley Global Campus
- Ferry service

Community Leader Perceptions

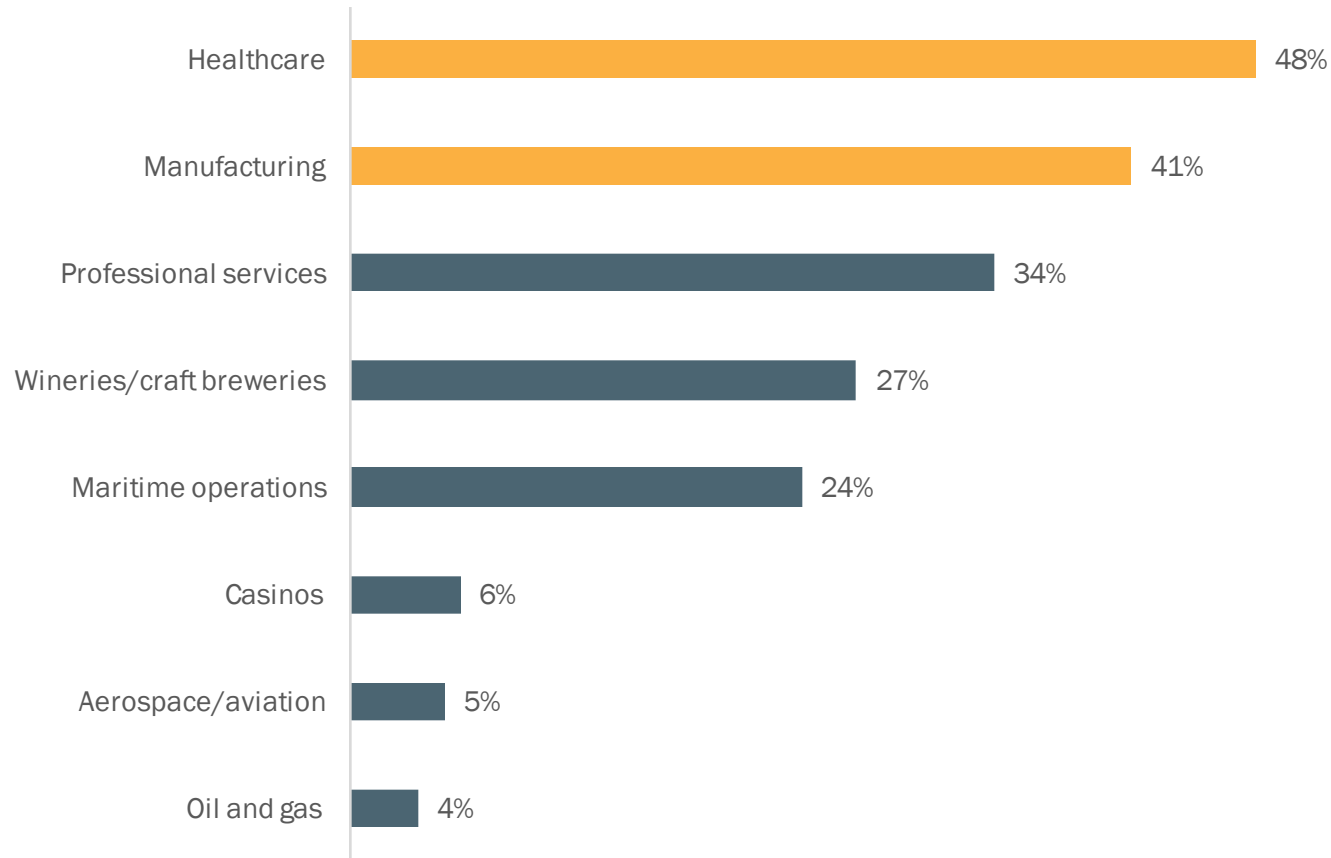
Richmond's economic growth goals should be developing, attracting, or expanding which of the following? Choose three.



Other: Affordable housing, warehouses, companies focused on sustainable methods, better schools

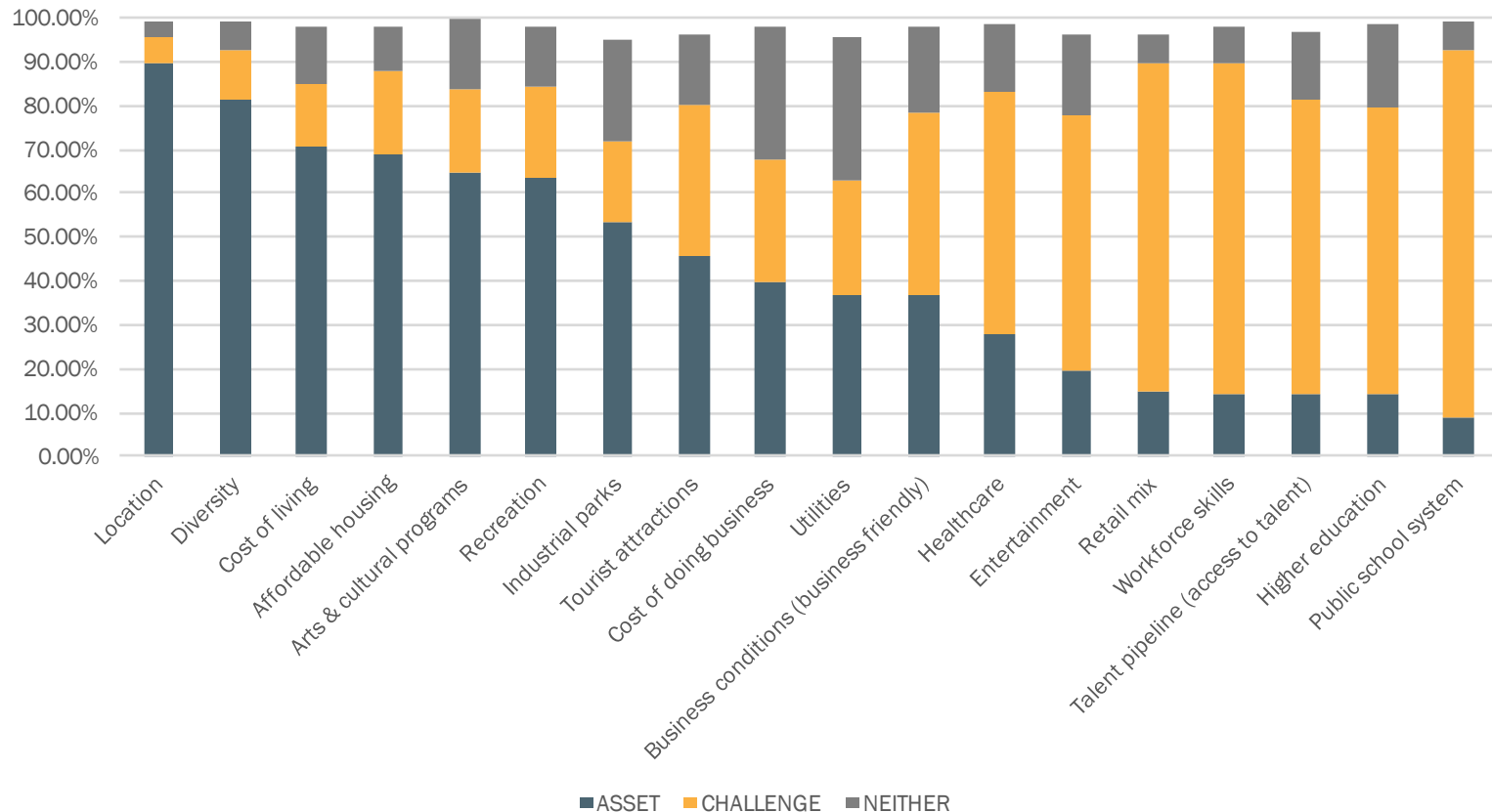
Community Leader Perceptions

In your opinion, which of the following sectors should Richmond target? Choose two.



Community Leader Perceptions

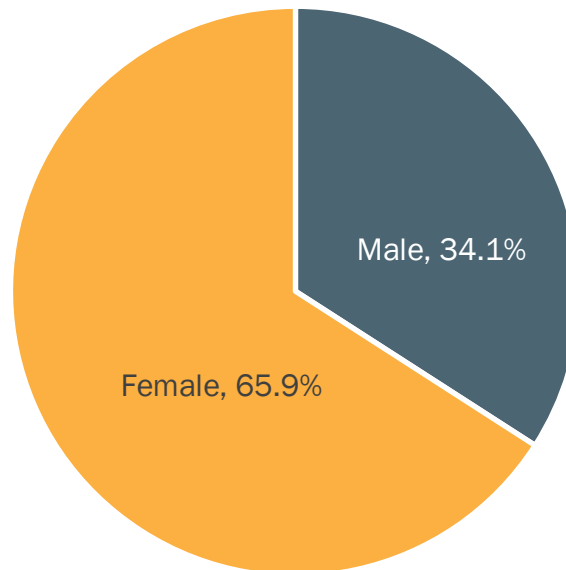
Rate the following as an existing asset supporting economic growth in Richmond, existing challenge hindering economic growth, or neither



Community Leader Perceptions

DEMOGRAPHICS

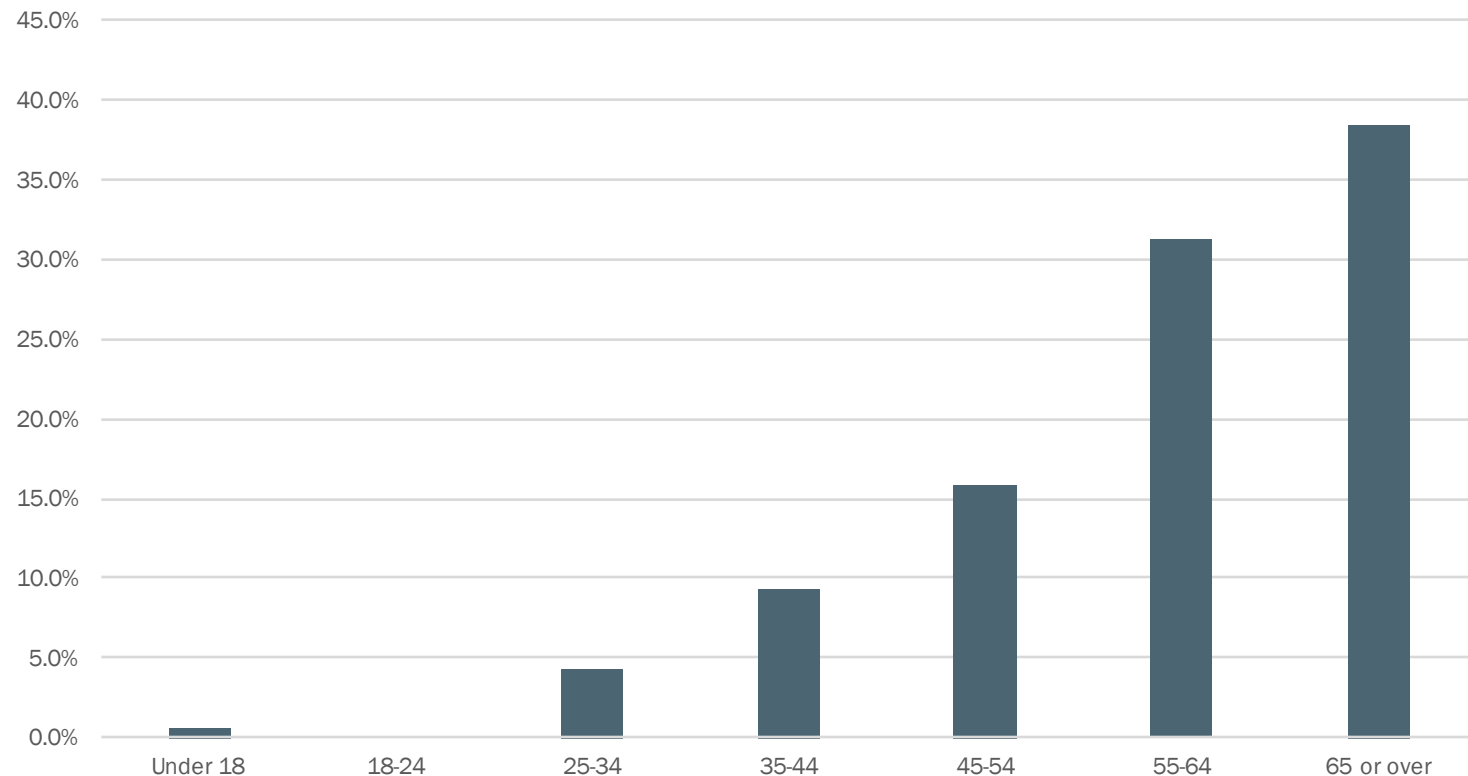
What is your gender?



Community Leader Perceptions

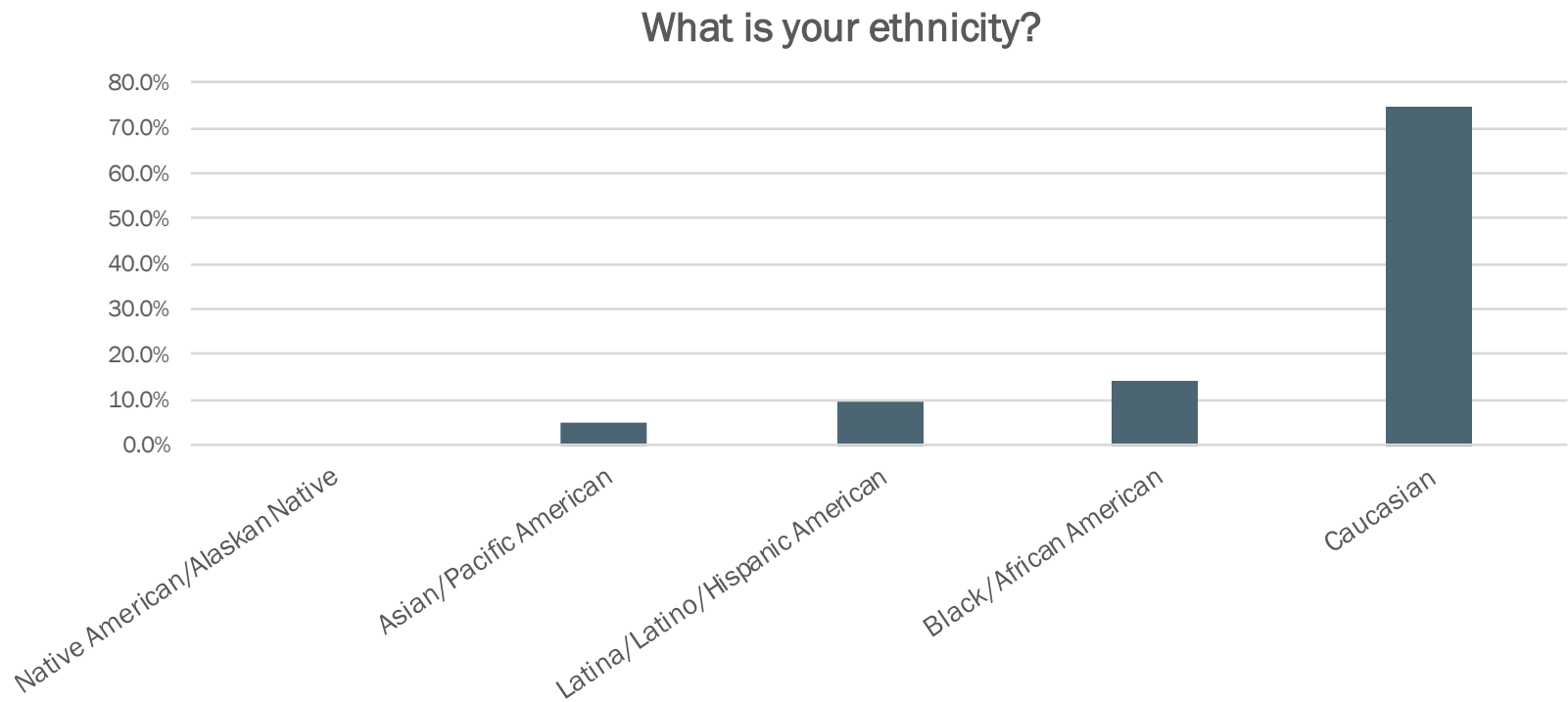
DEMOGRAPHICS

Which of the following includes your age?



Community Leader Perceptions

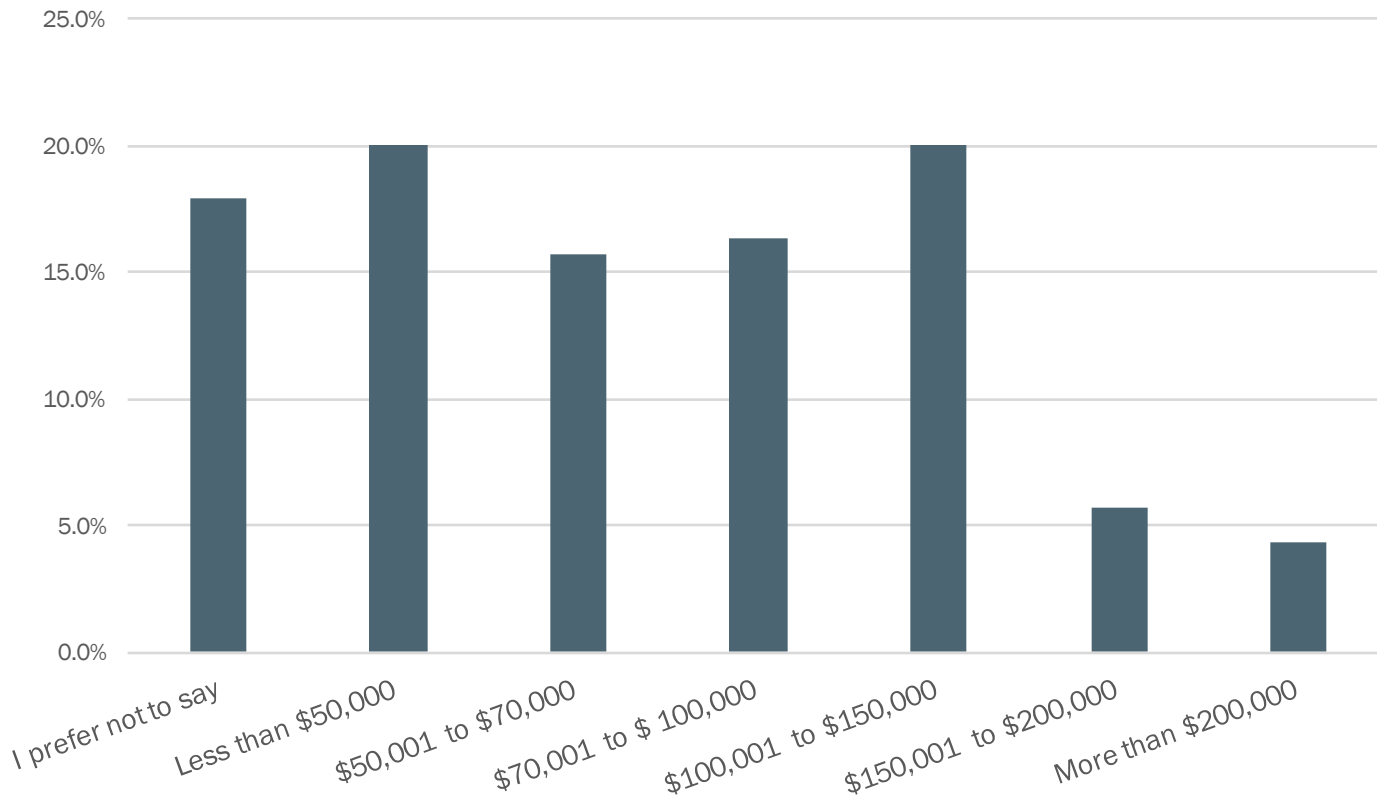
DEMOGRAPHICS



Community Leader Perceptions

DEMOGRAPHICS

What is your annual personal income?



Community Leader Perceptions

PERSONIFICATION OF RICHMOND

If Richmond were a famous person, who would it be? Why?

- Rosie the Riveter
 - *"She embodies a Can Do attitude that allowed a mixed racial workforce to out produce our adversaries in a time of national need."*
- Chris Rock
 - *"He's both down-to-earth and intelligent. Smart sense of humor, can engage people of all types of backgrounds."*
 - *"Gritty, funny, sometimes rude, but tells the truth"*
- Martin Luther King Jr.
 - *Because people fight for this city to do the right thing by it's residents.*



ONLINE COMMUNITY SURVEY

Purpose

The purpose of the Online Community Survey is to gain a quantitative measure of the community's perceptions of Richmond.

Methodology & Results

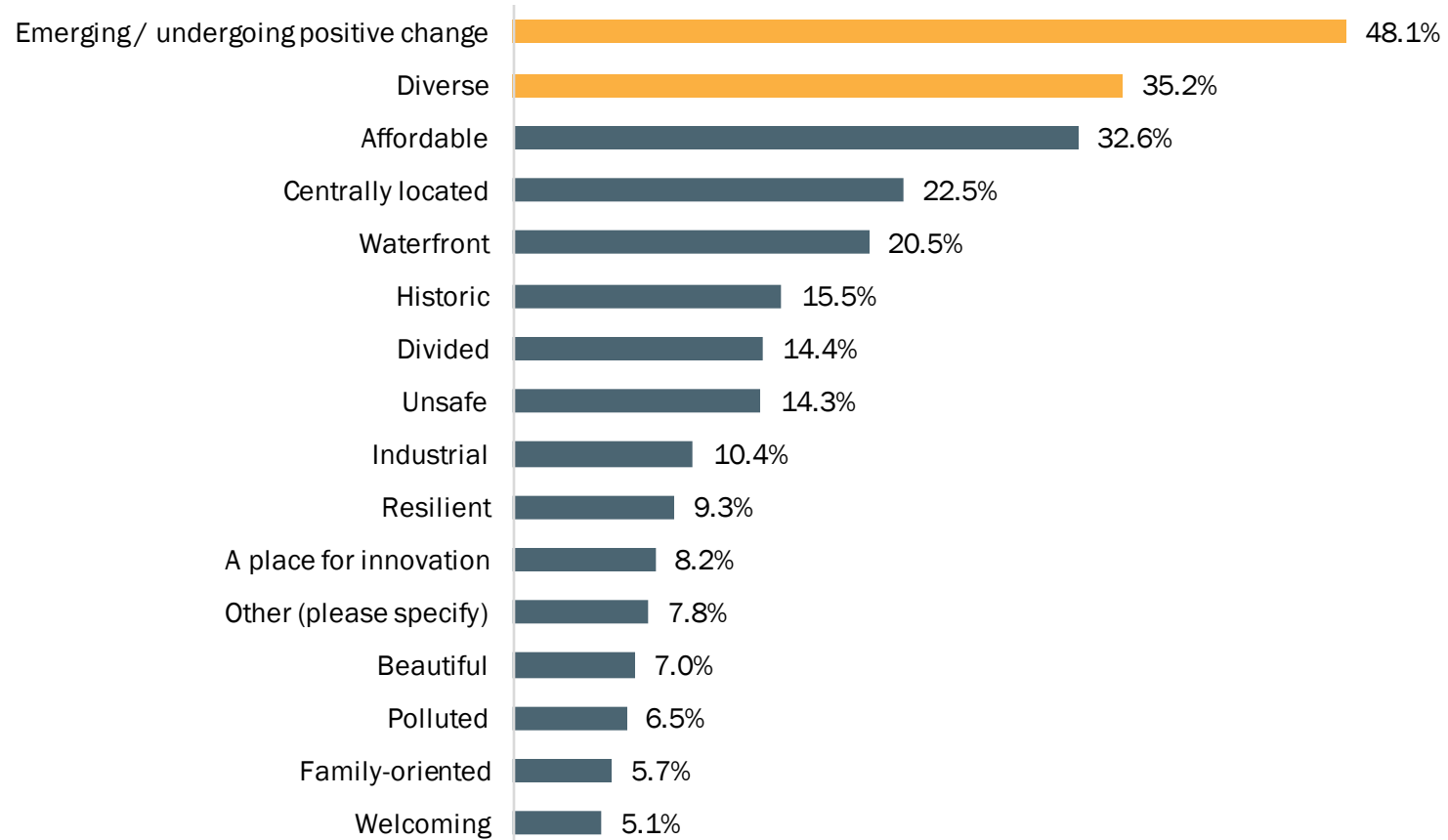
North Star developed an online survey informed by the results of the qualitative Stakeholder Vision Survey and In-Market conversations. All questions were multiple choice, allowing for a quantitative measure of resident perceptions. Community members were encouraged to participate after the survey was posted on city websites and publicized in local media.

647 survey responses were collected for this survey.

The graphs on the following pages highlight responses for each question on the corresponding survey, allowing side-by-side comparison of results. Please refer **Appendix B** on the Final Report CD for a detailed list of all "Other" responses.

Resident Perceptions

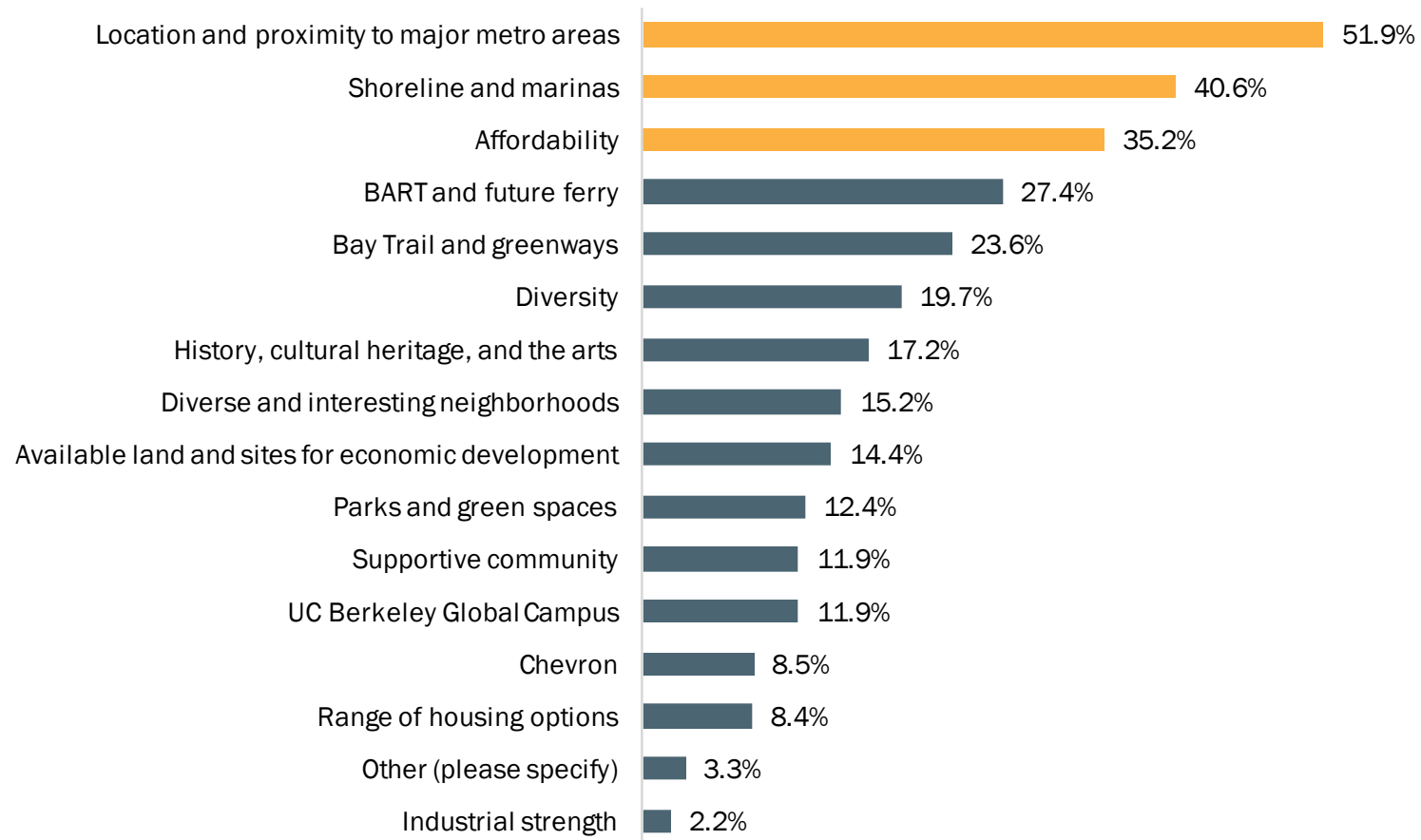
Which of the following is the best descriptor for Richmond today? Choose two answers.



Other: Train station, neglected, corrupt, up and coming, uneducated, progressive and innovative

Resident Perceptions

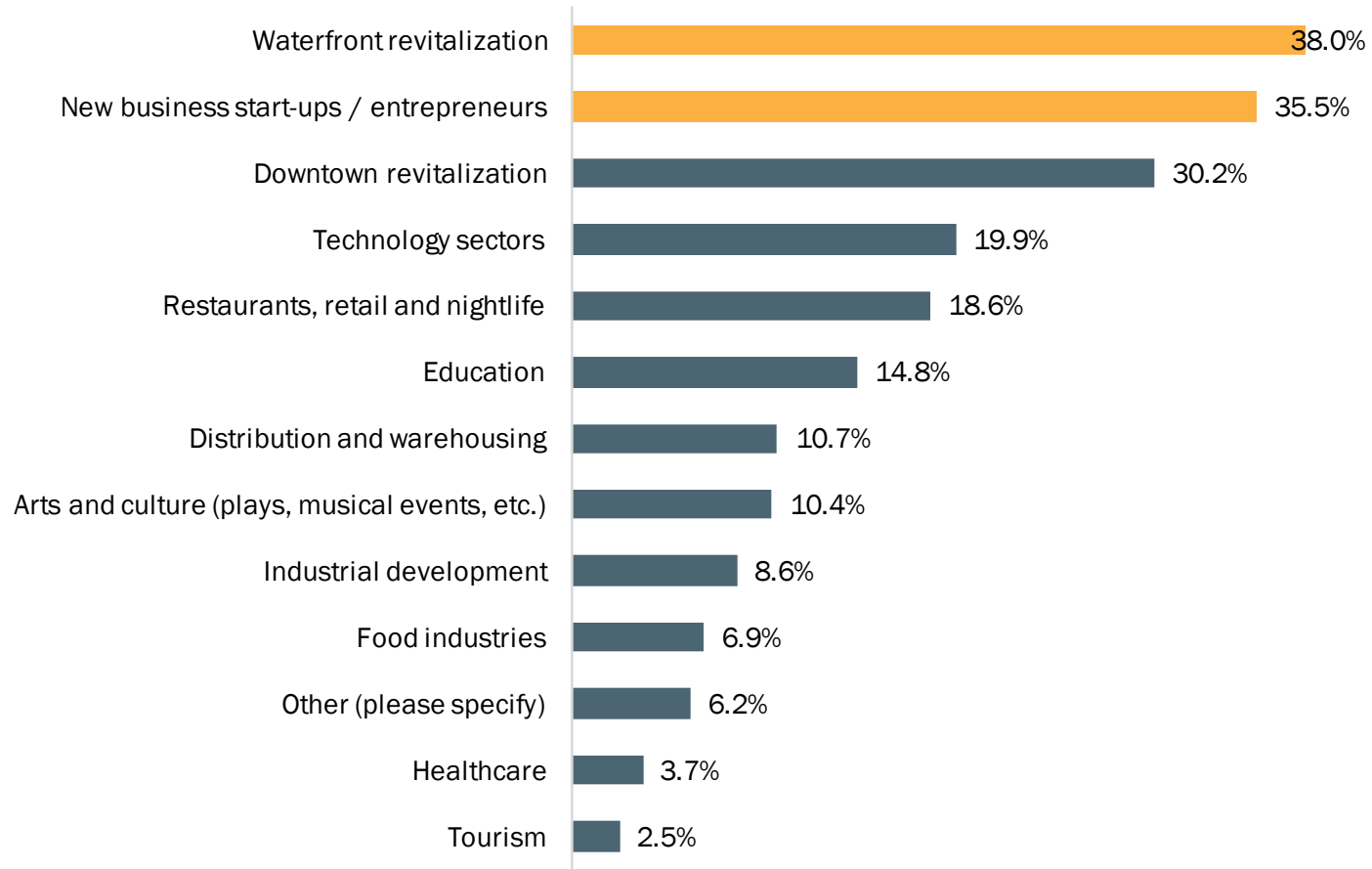
In your opinion, what are Richmond's three greatest assets?
Choose three answers.



Other: Schools, progressive politics, human rights city, Rosie the Riveter, major freeways

Resident Perceptions

In your opinion, what are Richmond's two greatest areas for future economic growth?
Choose two answers.

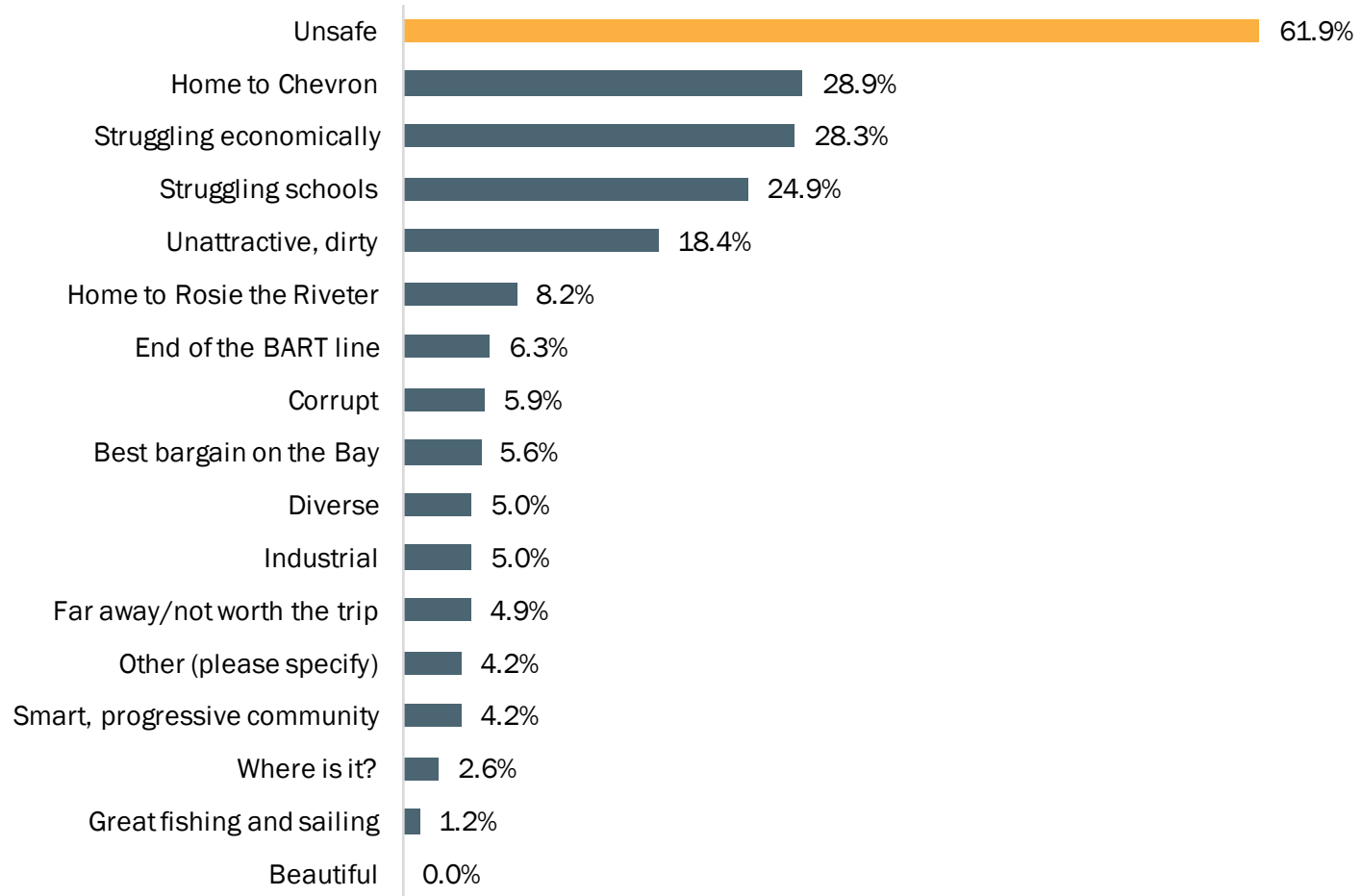


Other: Green industry, UC Global Campus, Hilltop Mall revitalization

Resident Perceptions

Outsiders (residents in other nearby communities) would describe Richmond as...

Choose two answers.



Other: No reason to go there, unsafe, ugly

Resident Perceptions

AREA COMMUNITIES

What is the first adjective that comes to mind when describing the following communities?

Berkeley

- Hip/hippies
- Educated
- Liberal
- Progressive

Albany

- Expensive
- Family
- Good schools
- small

El Cerrito

- Nice/pleasant
- Family
- Boring
- Safe

San Rafael

- Beautiful
- Upscale
- Expensive
- Nice

Oakland

- Crime/unsafe
- Dangerous
- Diverse
- Struggling

San Francisco

- Expensive
- Beautiful
- Crowded
- Exciting

Emeryville

- Crowded
- Industrial
- Shopping
- Business

Alameda

- Family
- Island
- Isolated
- Quaint/charming

Resident Perceptions

DIFFERENTIATING RICHMOND

What makes Richmond different from the communities listed in the previous question?

Affordability

- Affordable land and housing

Culturally Diverse

- Many ethnic heritages represented
- Creativity
- Tenacity

Potential

- Vision
- Potential for development

Rich History

- WWII
- Kaiser

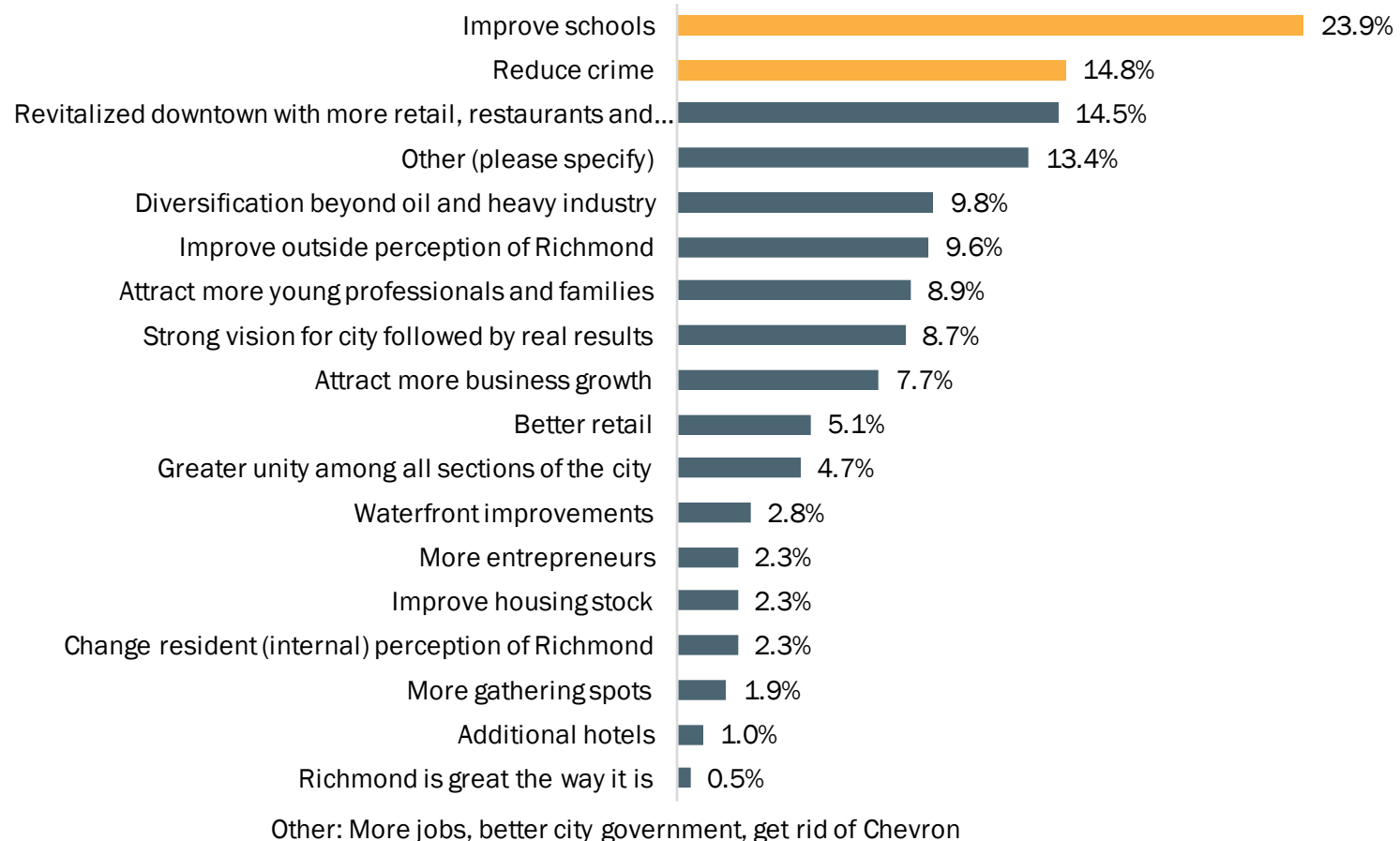
Resident Perceptions

What surprises people about Richmond?

- Point Richmond
- Shoreline and Waterfront
- Beautiful housing and neighborhoods
- Local arts, music, and food scene

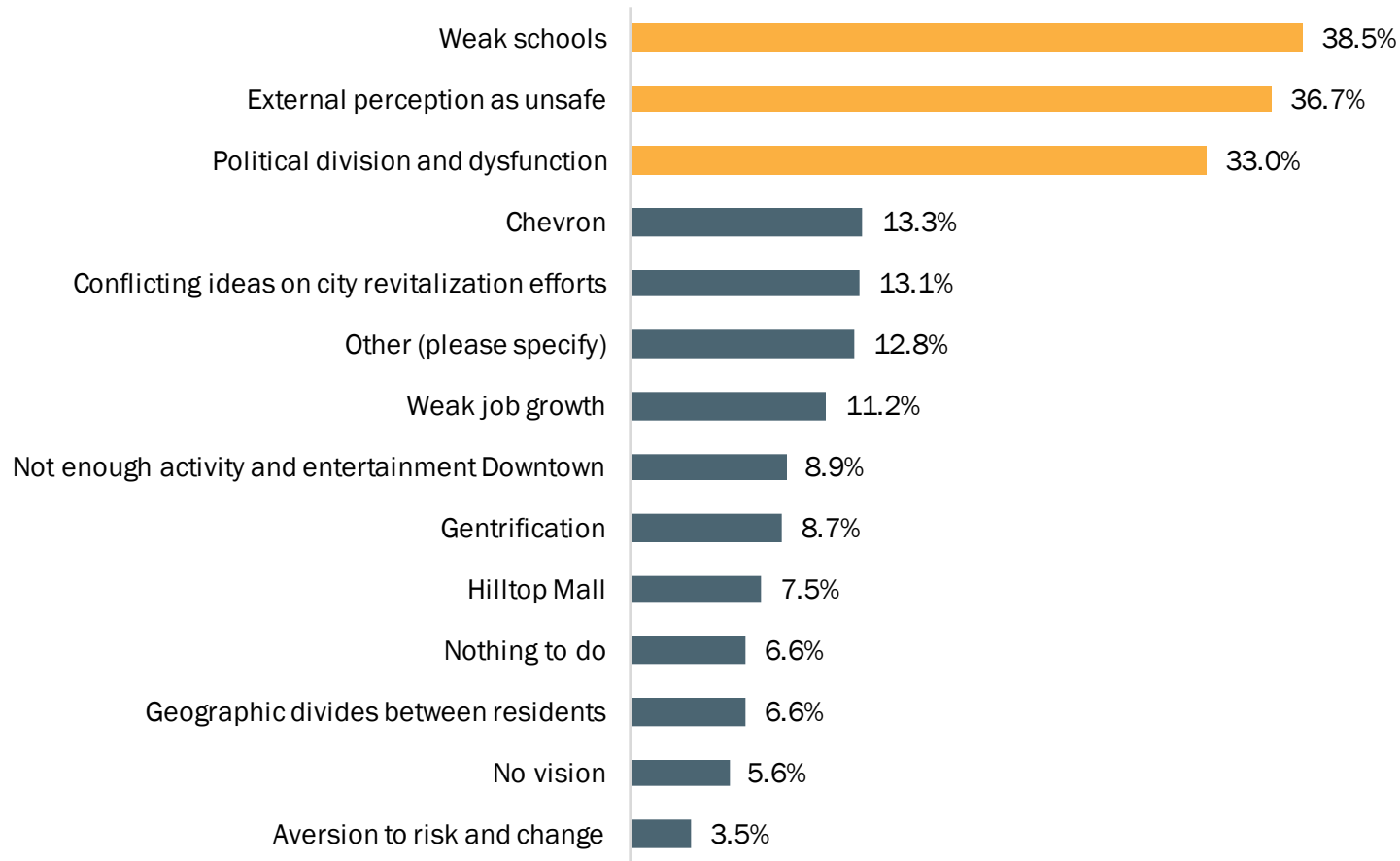
Resident Perceptions

If you could change ONE thing about Richmond that would improve its future, what would it be?
Choose two answers.



Resident Perceptions

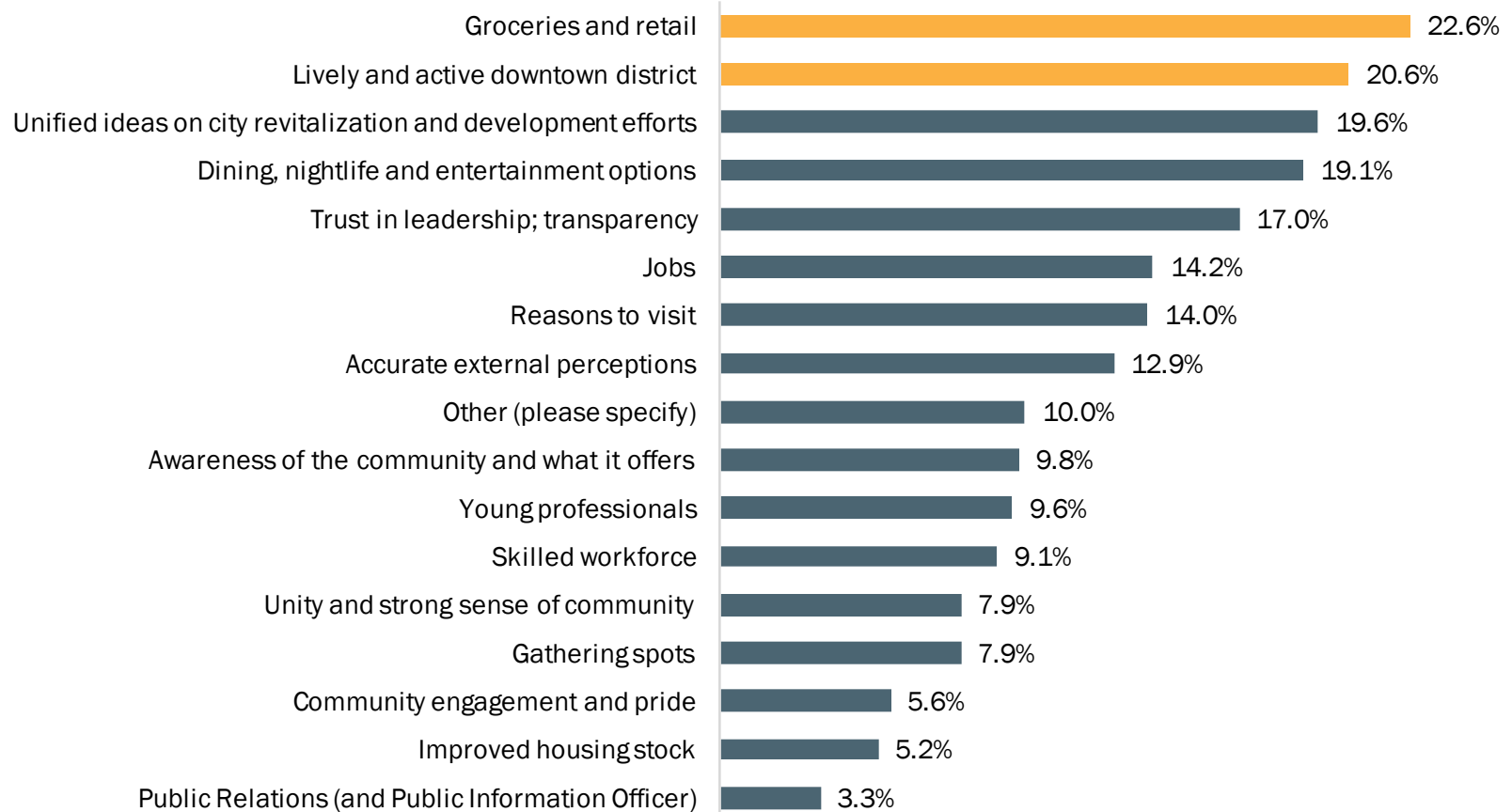
In your opinion, what are the two greatest challenges currently facing Richmond?
Choose three answers.



Other: Crime, city finances, housing options

Resident Perceptions

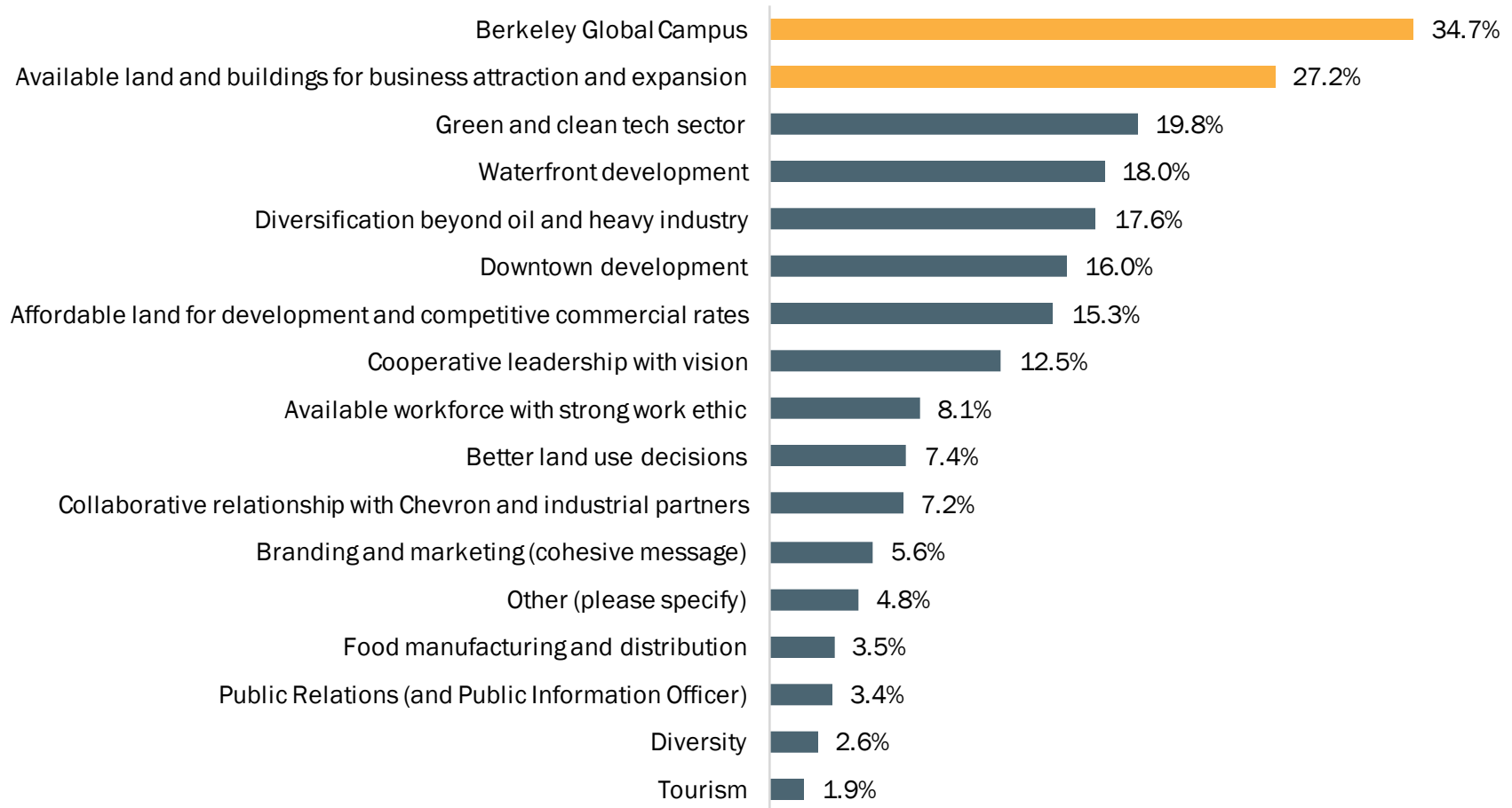
In your opinion, what is missing in Richmond? Choose two answers.



Other: Good schools, affordable housing, diverse shopping, public transportation options, clean air

Resident Perceptions

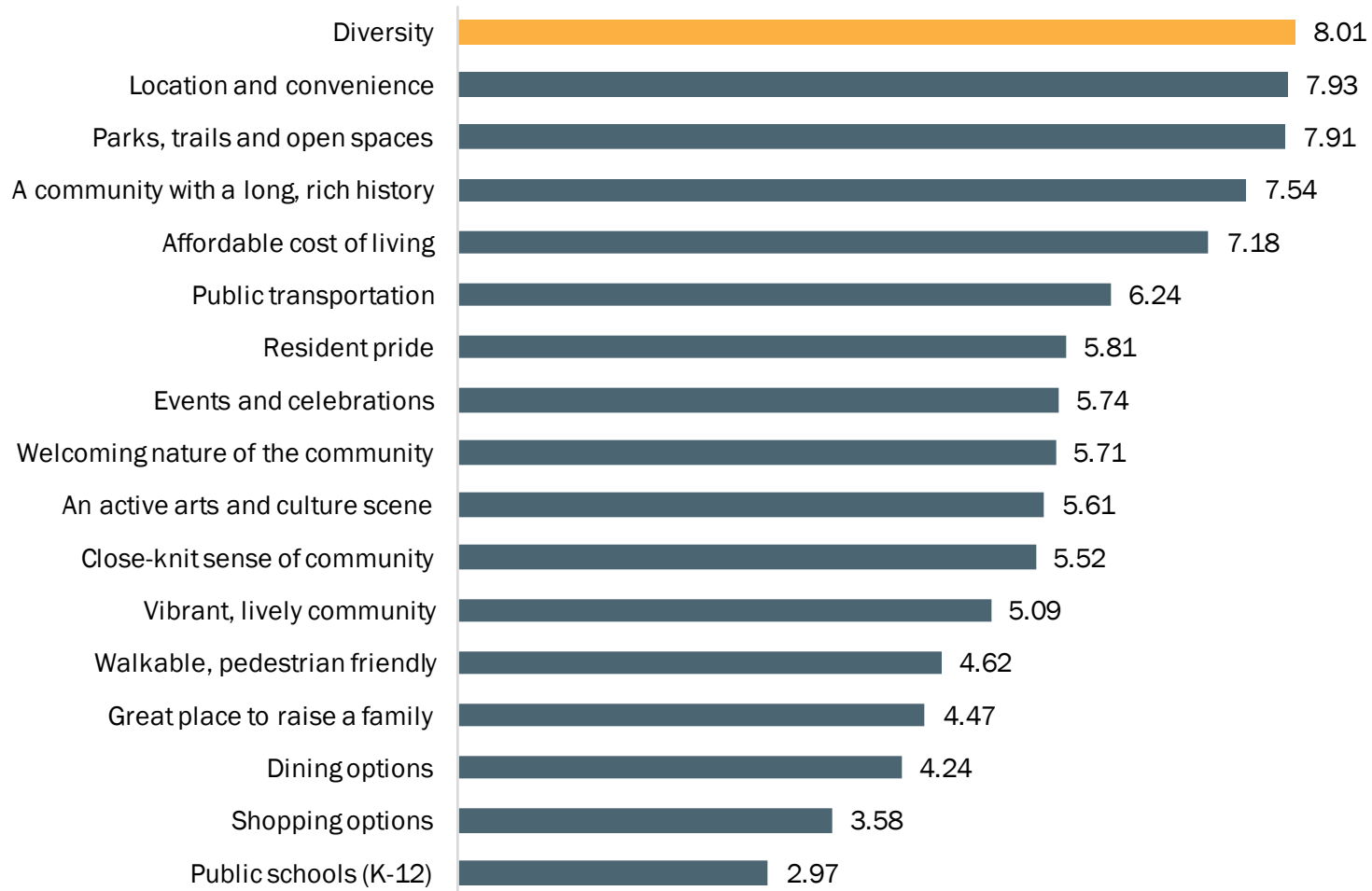
What do you consider Richmond's greatest opportunities for growth and improvement?
Choose two answers



Other: Ferry service, green spaces, mixed-use development downtown

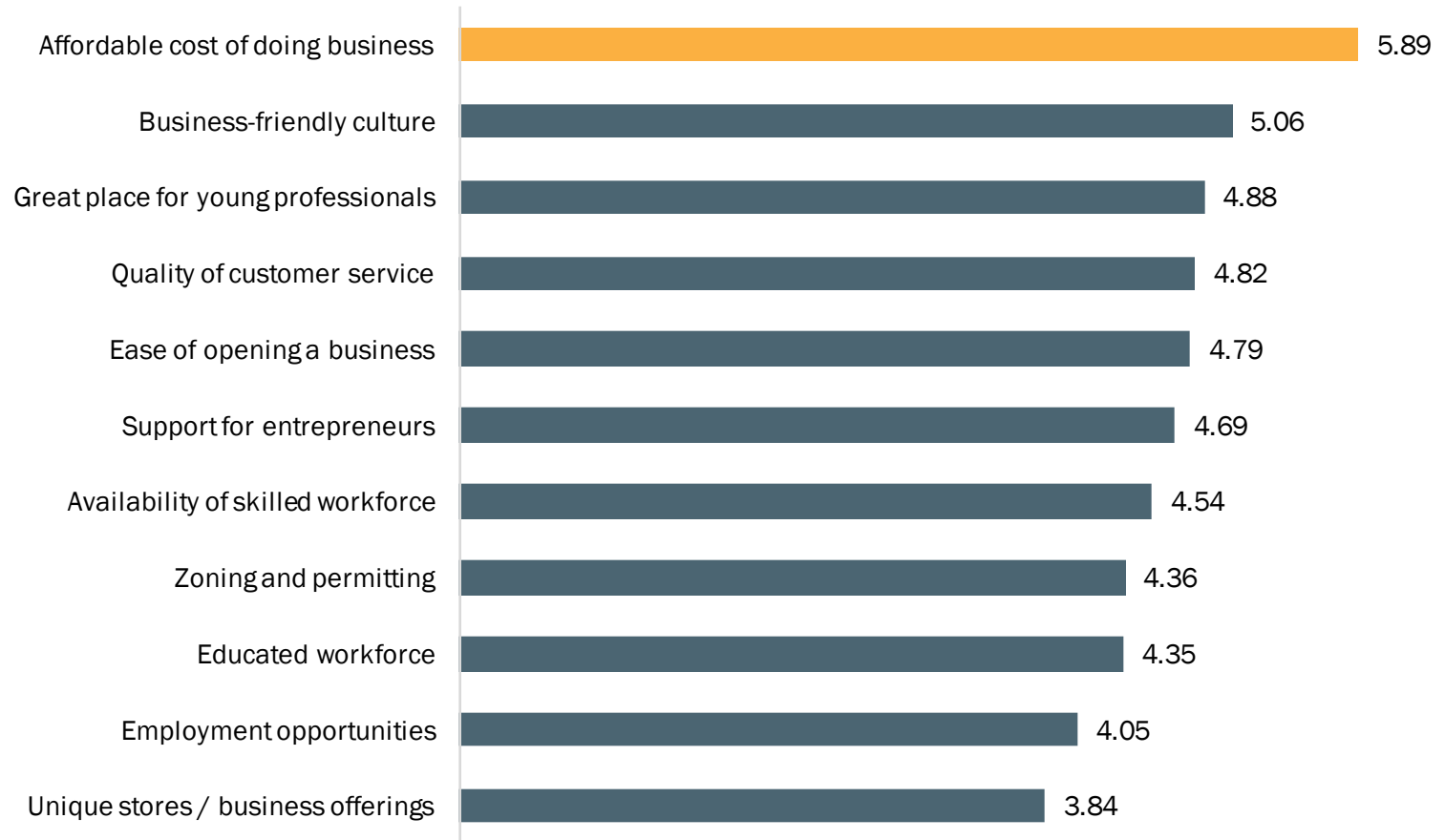
Resident Perceptions

In your opinion, please rate the following Richmond attributes and characteristics on a scale from 1-10, where 1 is "Poor" and 10 is "Excellent."



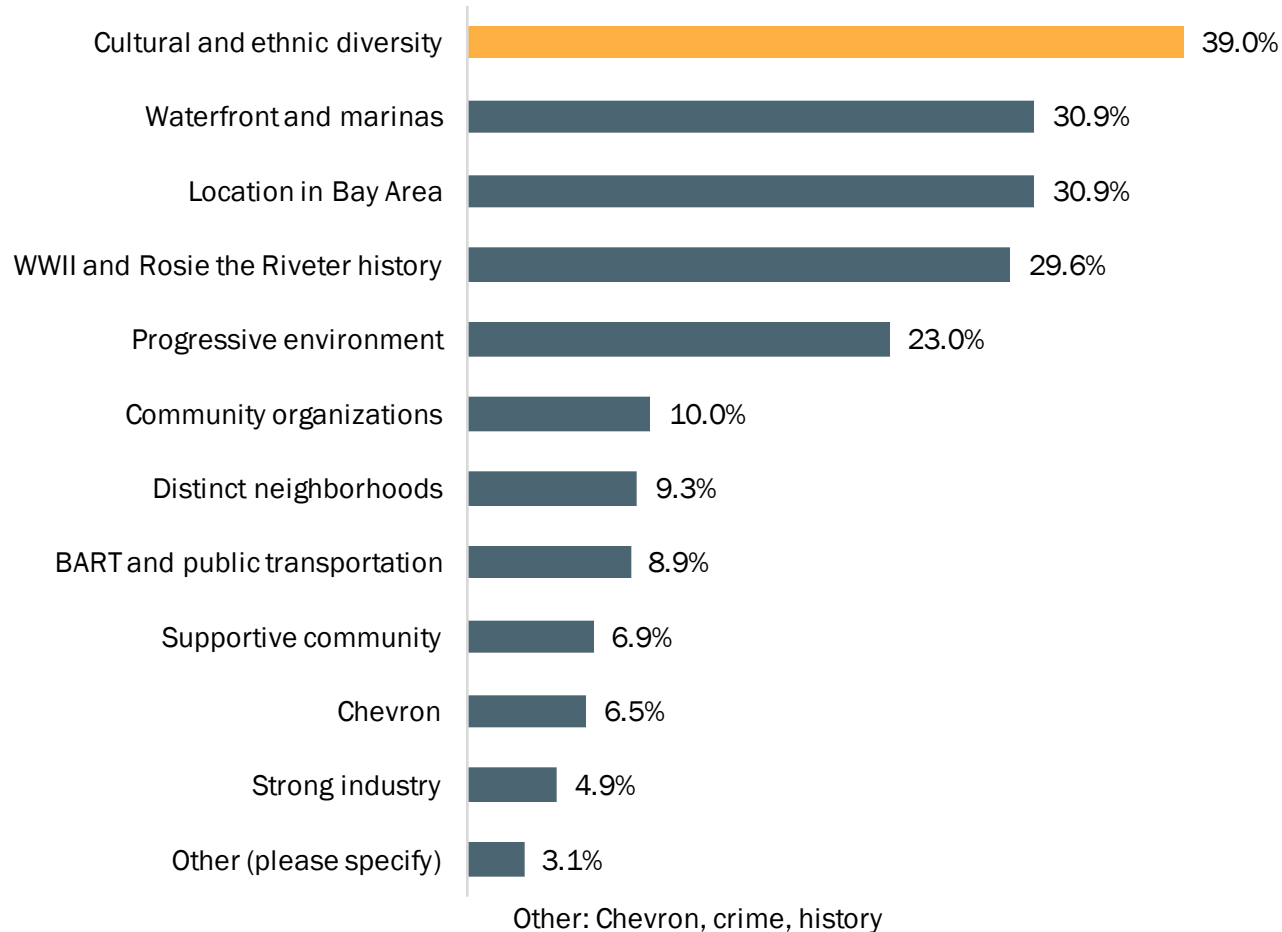
Resident Perceptions

In your opinion or perception of the BUSINESS COMMUNITY, please rate the following Richmond attributes on a scale of 1-10, where 1 is "Poor" and 10 is "Excellent."



Resident Perceptions

In your opinion, what two things are most important to Richmond's identity as a community (without these Richmond loses its essence)? Choose two answers.



Resident Perceptions

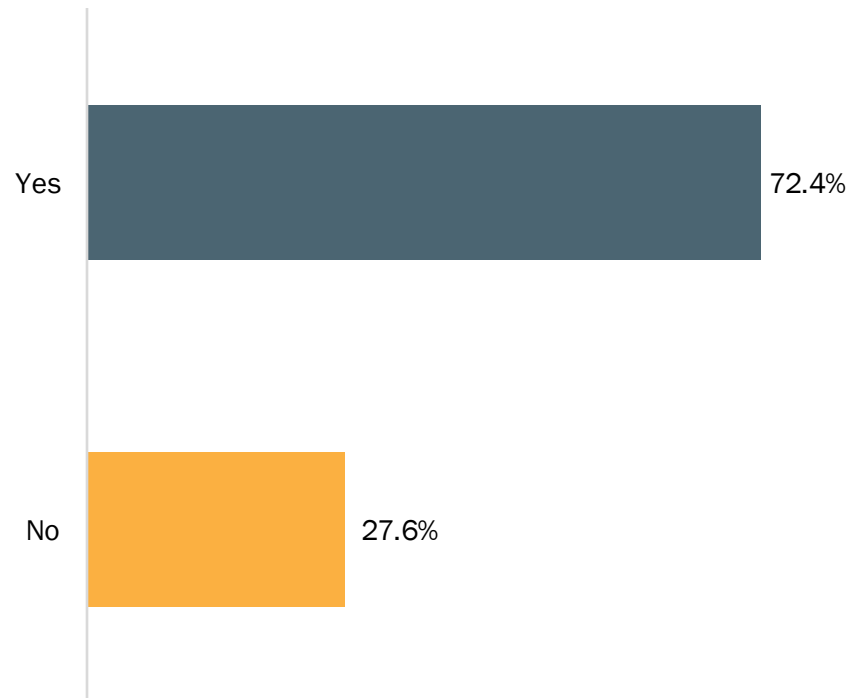
IMPROVING RICHMOND

What is Richmond's most under-appreciated asset/amenity?

- Waterfront/Shoreline
- Location (proximity to San Francisco)
- Rosie the Riveter
- Richmond Art Center
- Affordability

Resident Perceptions

Does Richmond celebrate its diversity? If YES, in what ways?



- Through festivals and celebrations
- Through art and music
- Through community organizations

Resident Perceptions

PERSONIFICATION OF RICHMOND

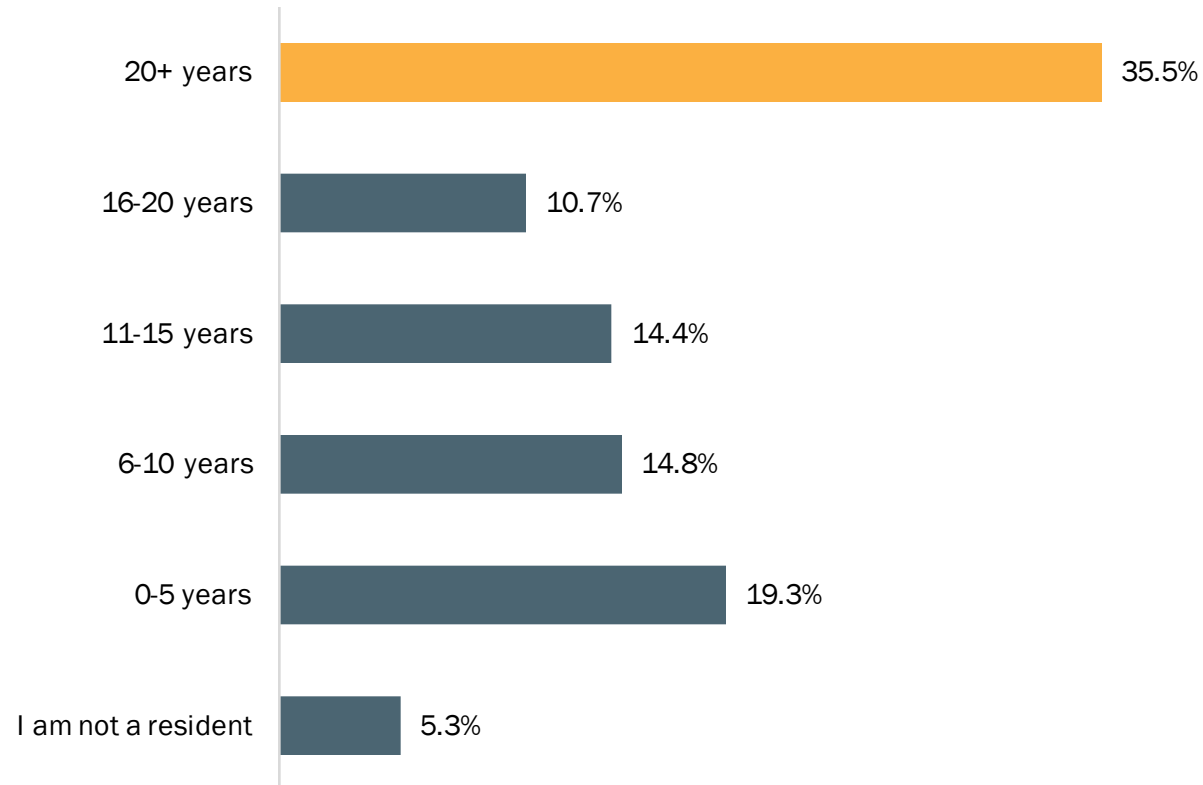
If Richmond were a celebrity who would it be? Why?

- Rosie the Riveter
 - *“Because she was resilient. Because of our middle class hard-working reputation. Because we CAN.”*
- Rodney Dangerfield
 - *“Gets no respect but won't really do what it needs to do to solve the problem.”*
- President Obama
 - *“Changing the City one move at a time.”*



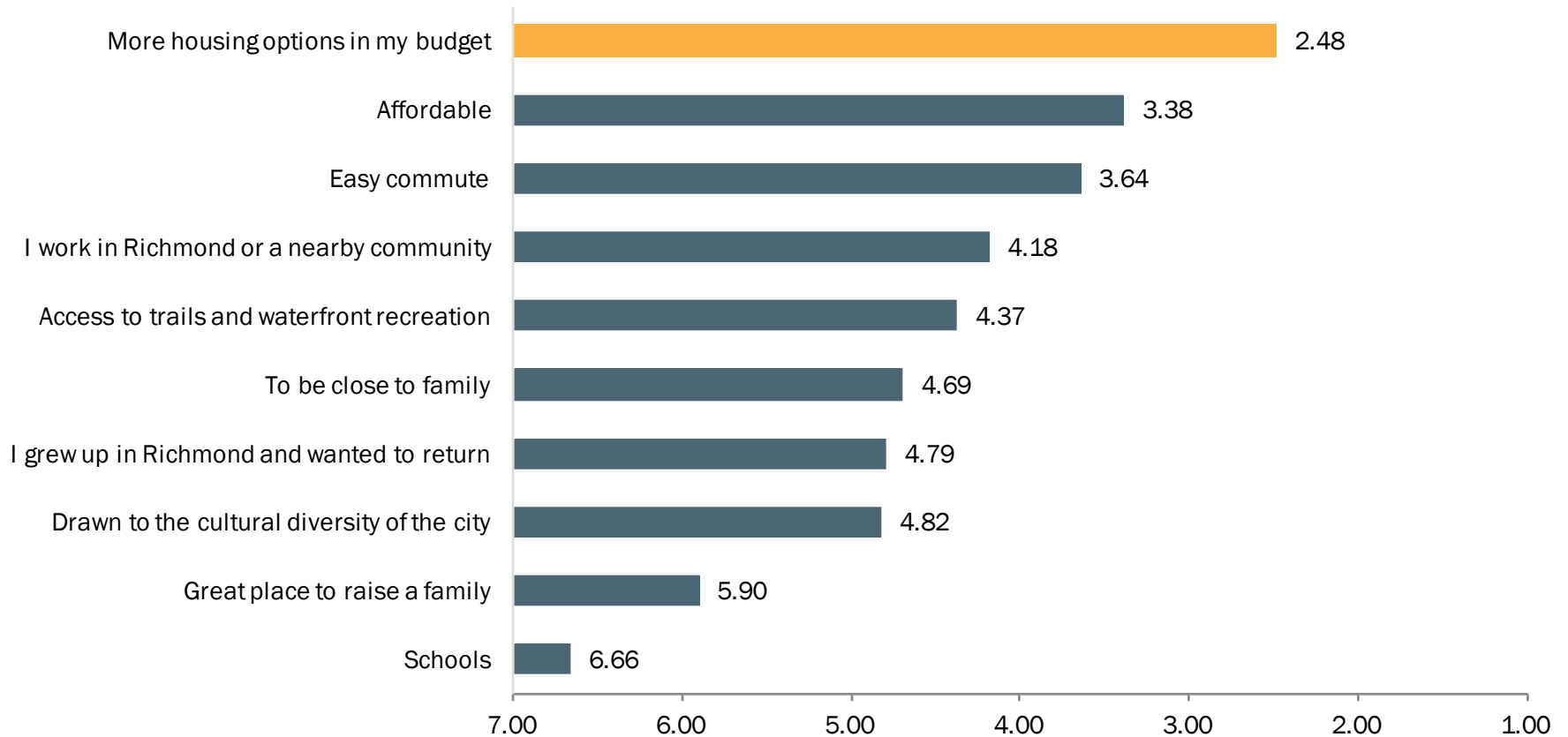
Resident Perceptions

How long have you been a resident of Richmond?



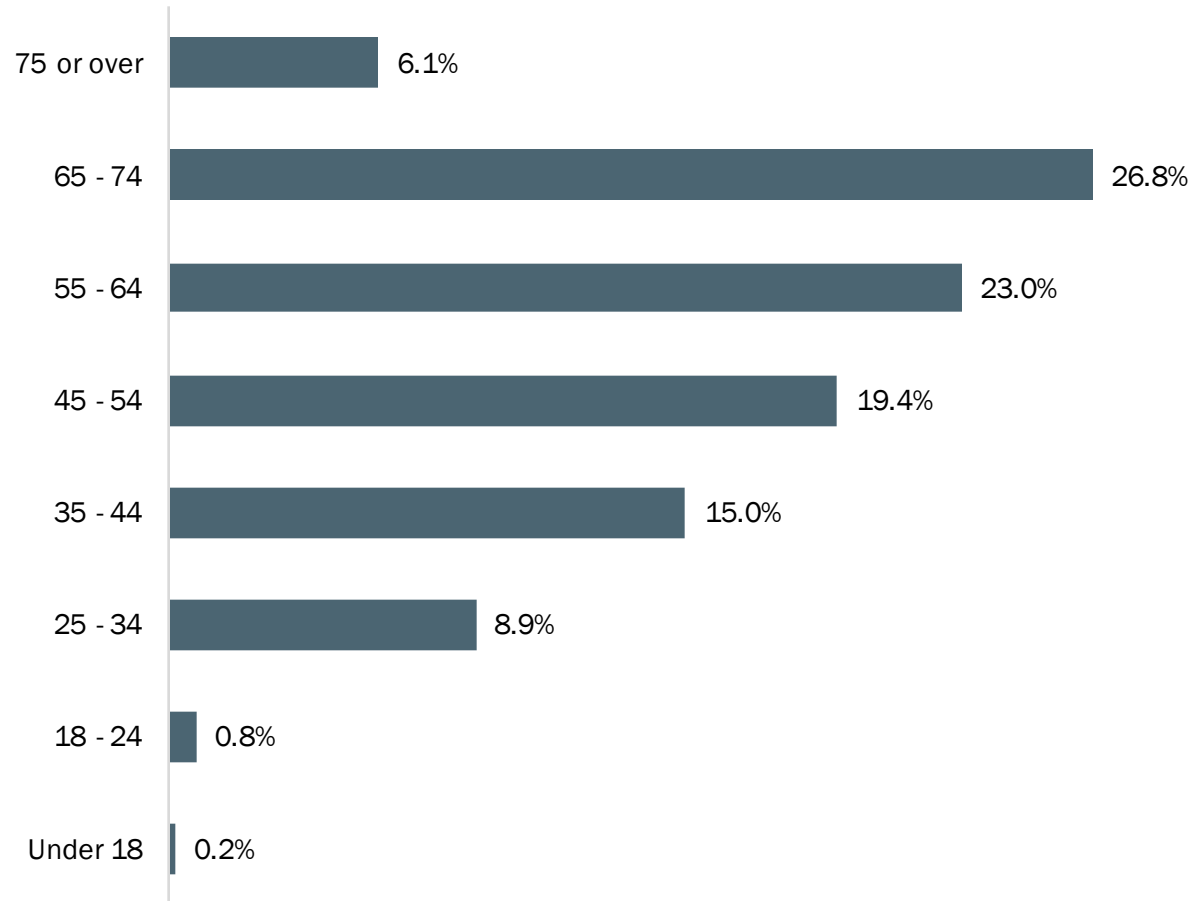
Resident Perceptions

Please rank by importance the reasons why you moved to Richmond (or have never left).
Identify the most important priority as 1 and 10 as the least important priority.



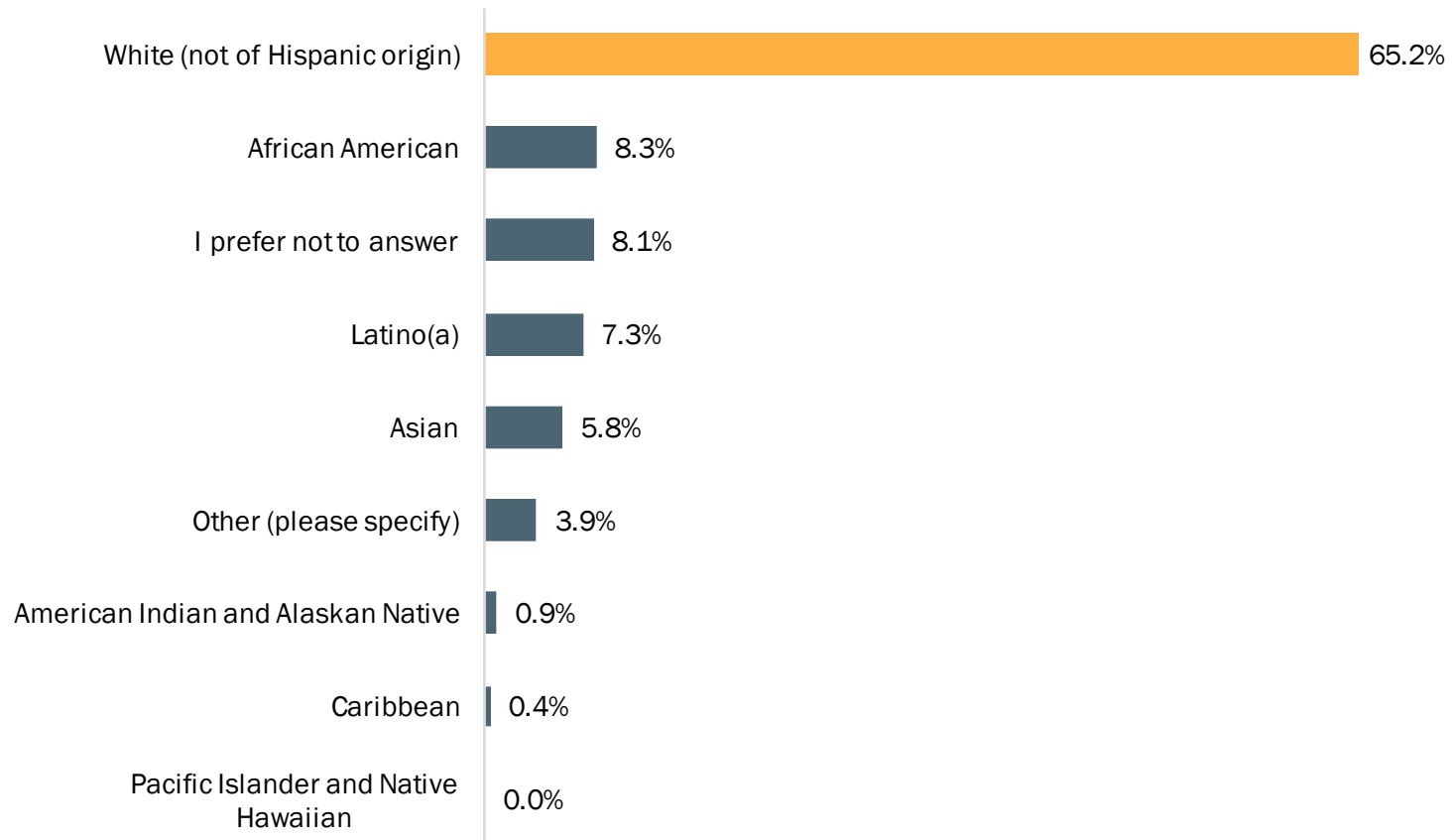
Resident Perceptions

Which of the following includes your age?



Resident Perceptions

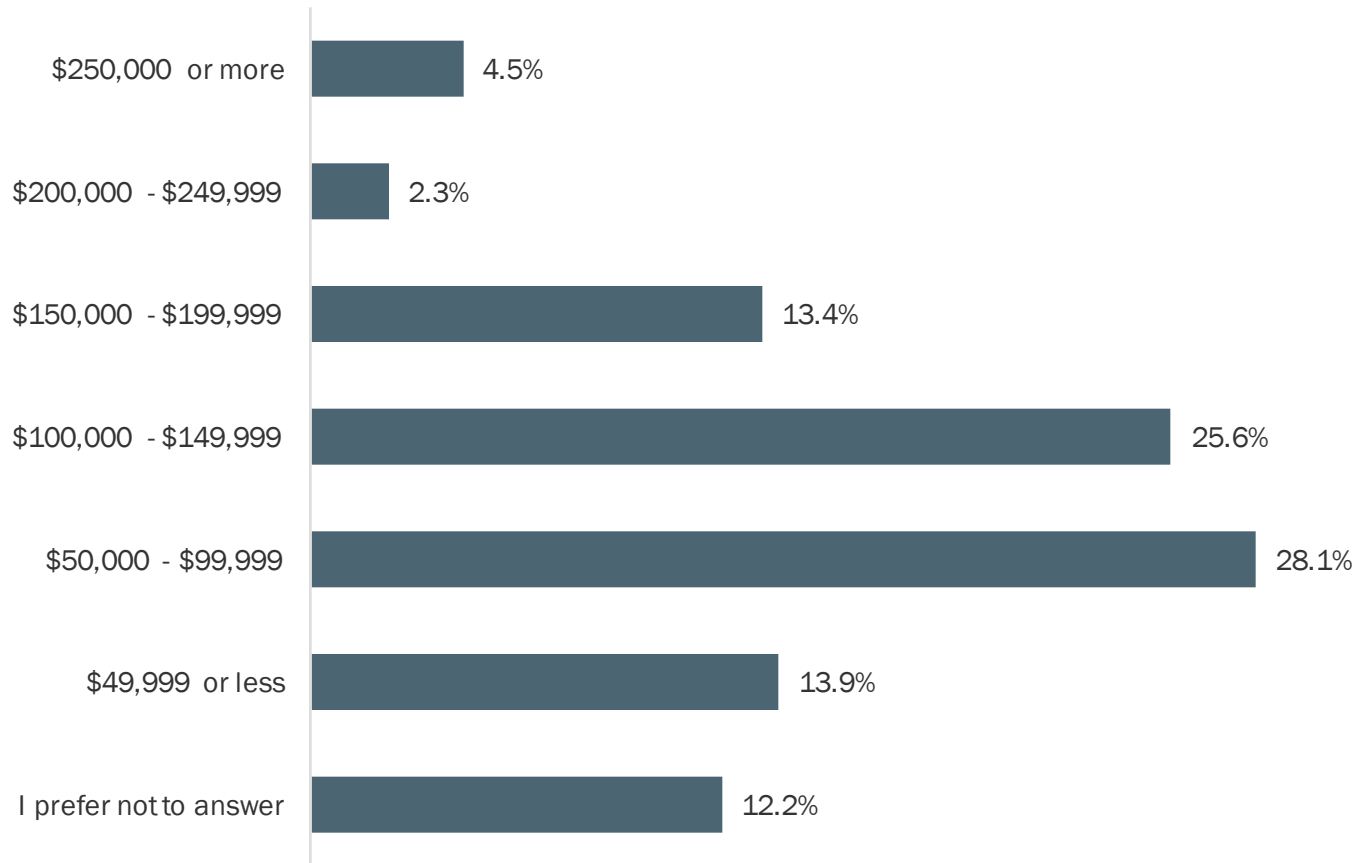
Which of the following best describes you?



Other: Half Latina half White, Irish, Middle Eastern, Mixed-race

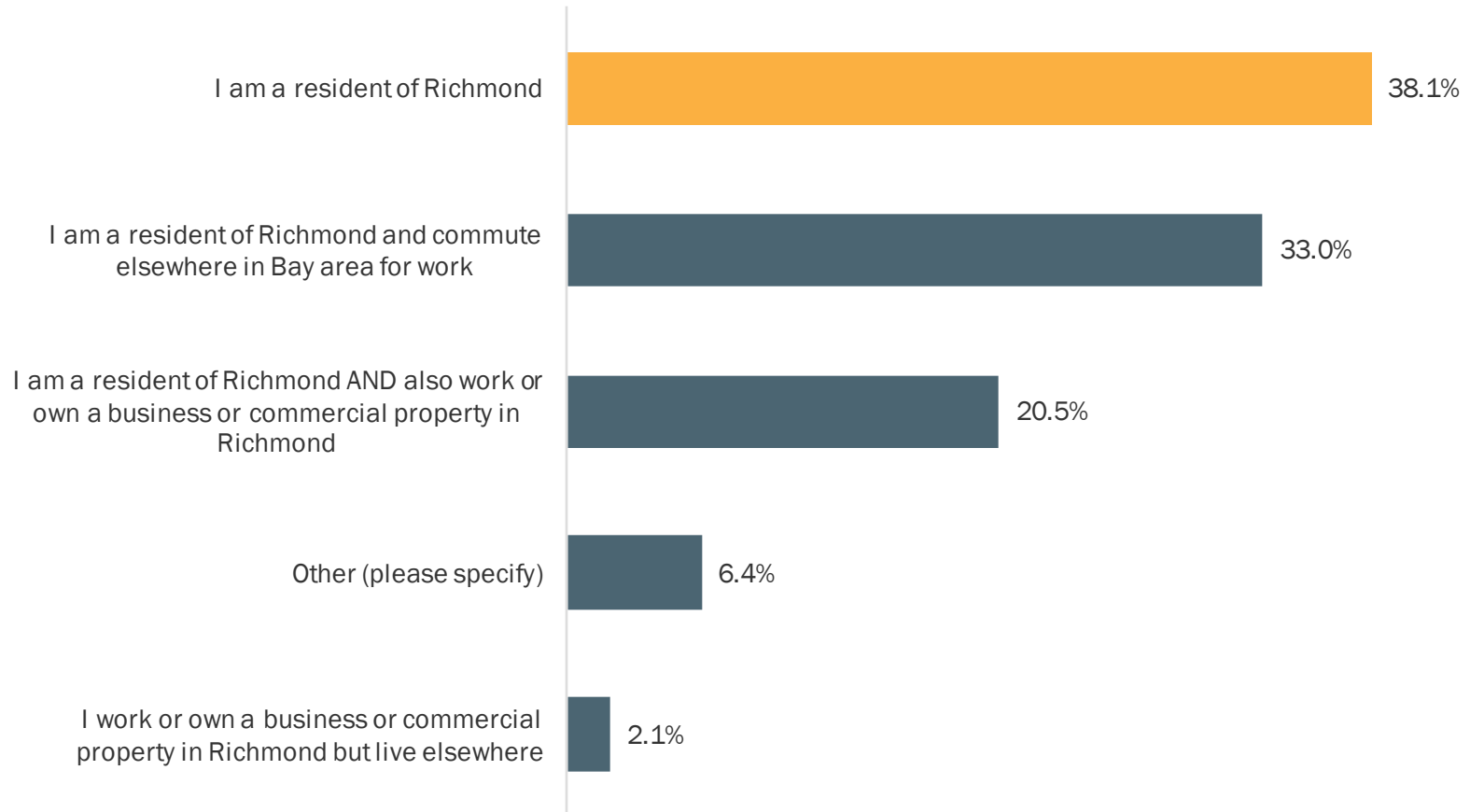
Resident Perceptions

Which of the following levels matches your total household income?



Resident Perceptions

Which of the following best describes you?



Other: Retired, frequent Richmond visitor, self-employed resident of Richmond

BRAND BAROMETER

Purpose

The Community Brand Barometer is conducted as a part of the Online Community Survey (647 respondents) and measures strength of the Richmond brand according to:

- Resident satisfaction with and advocacy for Richmond as a place to live, visit, and conduct business
- Richmond satisfaction/advocacy relative to the nation.

Methodology & Results

Significant research* on a wide variety of customer satisfaction metrics found a single powerful question has the greatest ability both to measure current resident satisfaction and predict future community growth. That question, “Would you recommend your city to a friend or colleague as a place to live (or work or visit)?” is powerful because it surpasses the basic model of economic exchange, where money is spent for products or services. People who score their community high on the Brand Barometer actively recruit new residents, visitors, and businesses through positive word-of-mouth marketing. It is very personal. By making a strong recommendation, they are willing to risk their own character, trustworthiness and overall reputation for no tangible reward.

The methodology for the Brand Barometer has been carefully developed and determined to be statistically significant. Participants in the community-wide surveys answered three questions:

- Would you recommend living in Richmond to a friend or colleague?
- Would you recommend visiting Richmond to a friend or colleague?
- Would you recommend conducting business in Richmond to a friend or colleague?

*Research conducted by Satmetrix Systems, Inc., Bain & Company and Fred Reichheld, author of “The One Number You Need to Grow,” Harvard Business Review (Dec. 2003).

BRAND BAROMETER

Methodology & Results (cont.)

Responses are measured on a 10-point scale with 1 being “Not at all likely” and 10 being “Extremely likely.” Results are presented on an individual respondent level as well as an aggregate Brand Advocacy Score. Scores are calculated with response percentages in the following categories:

- Promoters (9 or 10) – Loyal residents who will continue fueling your growth and promoting your brand.
- Passives (7 or 8) – Satisfied but unenthusiastic residents who are vulnerable to other opinions and brands.
- Detractors (1-6) – Unhappy residents who can damage your brand and impede growth through negative referrals.

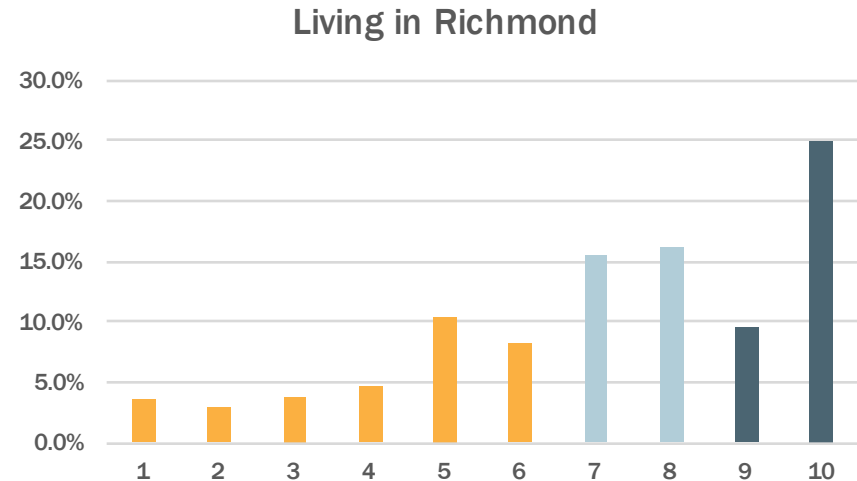
$$\text{Brand Advocacy Score} = \% \text{ Promoters} - \% \text{ Detractors}$$

Richmond’s Brand Advocacy Score can then be compared to a benchmark score that has been derived for the entire nation. North Star employs multiple survey methods through proprietary sources to determine national averages. Scores represent a stratified random sample of the entire U.S. population and are updated on a regular basis. You can use this information to track your own brand performance relative to national trends over time. In addition, you can repeat the Brand Barometer after a designated period and compare the results to your own benchmark score for an on-going metric of how community attitudes change over time and in response to specific events or activities.

Brand Barometer

On a scale of 1 to 10 with 1 being “not at all likely” and 10 being “extremely likely,” how likely would you be to recommend living in Richmond to a friend or colleague?

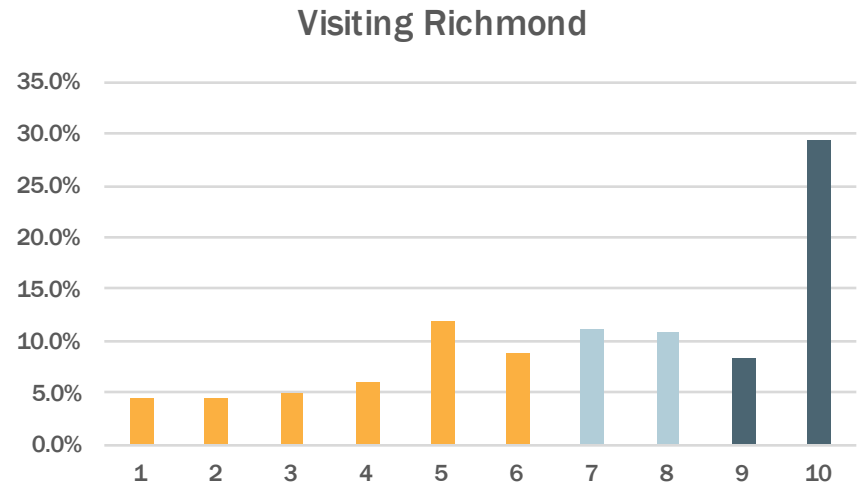
LIVING IN RICHMOND		
1	3.6%	Detractors 33.7%
2	3.0%	
3	3.8%	
4	4.7%	
5	10.4%	
6	8.2%	
7	15.6%	Passives 31.8%
8	16.2%	
9	9.4%	Promoters 34.5%
10	25.0%	



Brand Barometer

On a scale of 1 to 10 with 1 being “not at all likely” and 10 being “extremely likely,” how likely would you be to recommend visiting Richmond to a friend or colleague?

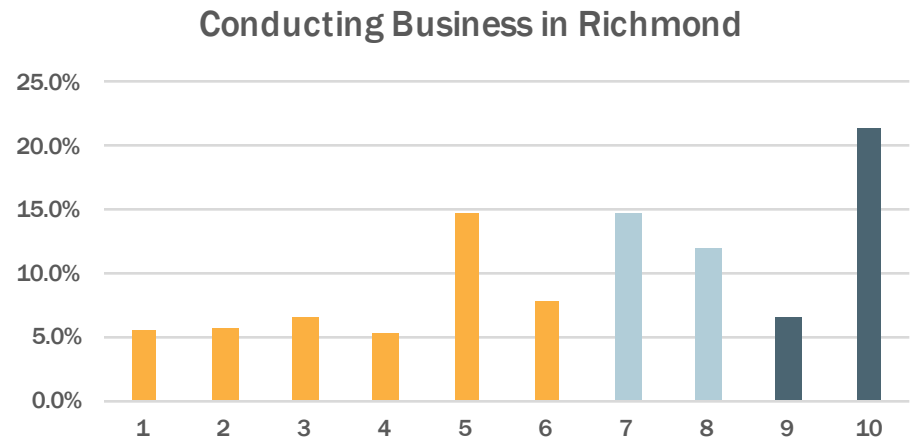
VISITING RICHMOND		
1	4.3%	Detractors 40.6%
2	4.5%	
3	5.0%	
4	6.1%	
5	11.9%	
6	8.8%	
7	11.1%	Passives 21.8%
8	10.8%	
9	8.2%	Promoters 37.6%
10	29.4%	



Brand Barometer

On a scale of 1 to 10 with 1 being “not at all likely” and 10 being “extremely likely,” how likely would you be to recommend conducting business in Richmond to a friend or colleague?

CONDUCTING BUSINESS IN RICHMOND		
1	5.5%	Detractors 45.4%
2	5.7%	
3	6.5%	
4	5.2%	
5	14.6%	
6	7.8%	
7	14.6%	Passives 26.7%
8	12.0%	
9	6.5%	Promoters 28.0%
10	21.5%	



Brand Barometer

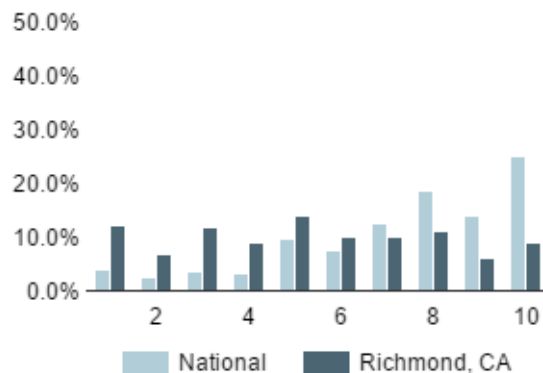
COMPARISON RESULTS | BY NUMBERED RESPONSE

Living in Your City		
	National	Richmond, CA
1	3.9%	12.3%
2	2.4%	6.9%
3	3.4%	11.7%
4	3.1%	9.0%
5	9.7%	14.0%
6	7.4%	10.1%
7	12.6%	10.1%
8	18.6%	11.1%
9	14.0%	6.0%
10	25.0%	8.8%

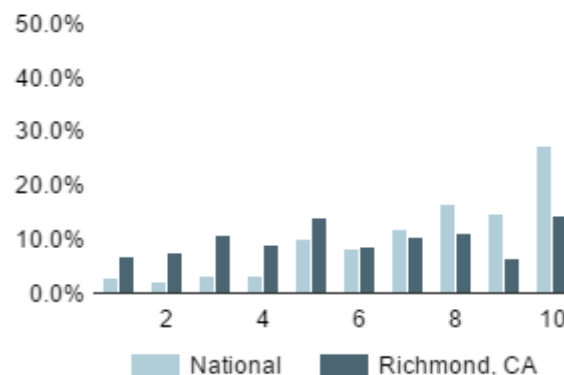
Visiting Your City		
	National	Richmond, CA
1	3.0%	6.9%
2	2.1%	7.7%
3	3.2%	10.9%
4	3.3%	9.0%
5	9.9%	14.1%
6	8.3%	8.8%
7	11.7%	10.4%
8	16.7%	11.3%
9	14.6%	6.5%
10	27.3%	14.4%

Conducting Business in Your City		
	National	Richmond, CA
1	4.3%	5.6%
2	2.7%	5.6%
3	4.4%	10.2%
4	3.8%	8.8%
5	11.5%	15.6%
6	9.9%	11.3%
7	13.1%	12.9%
8	17.2%	10.4%
9	13.0%	6.7%
10	20.1%	12.9%

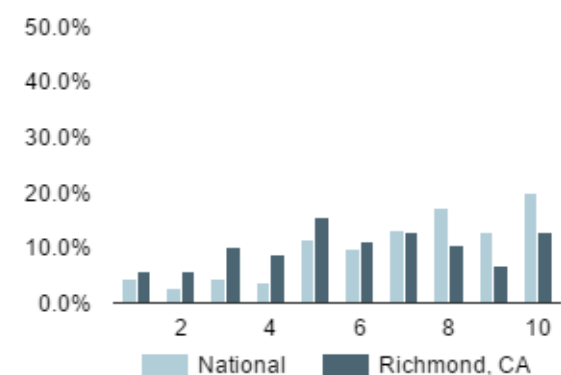
As a place to live



As a place to visit



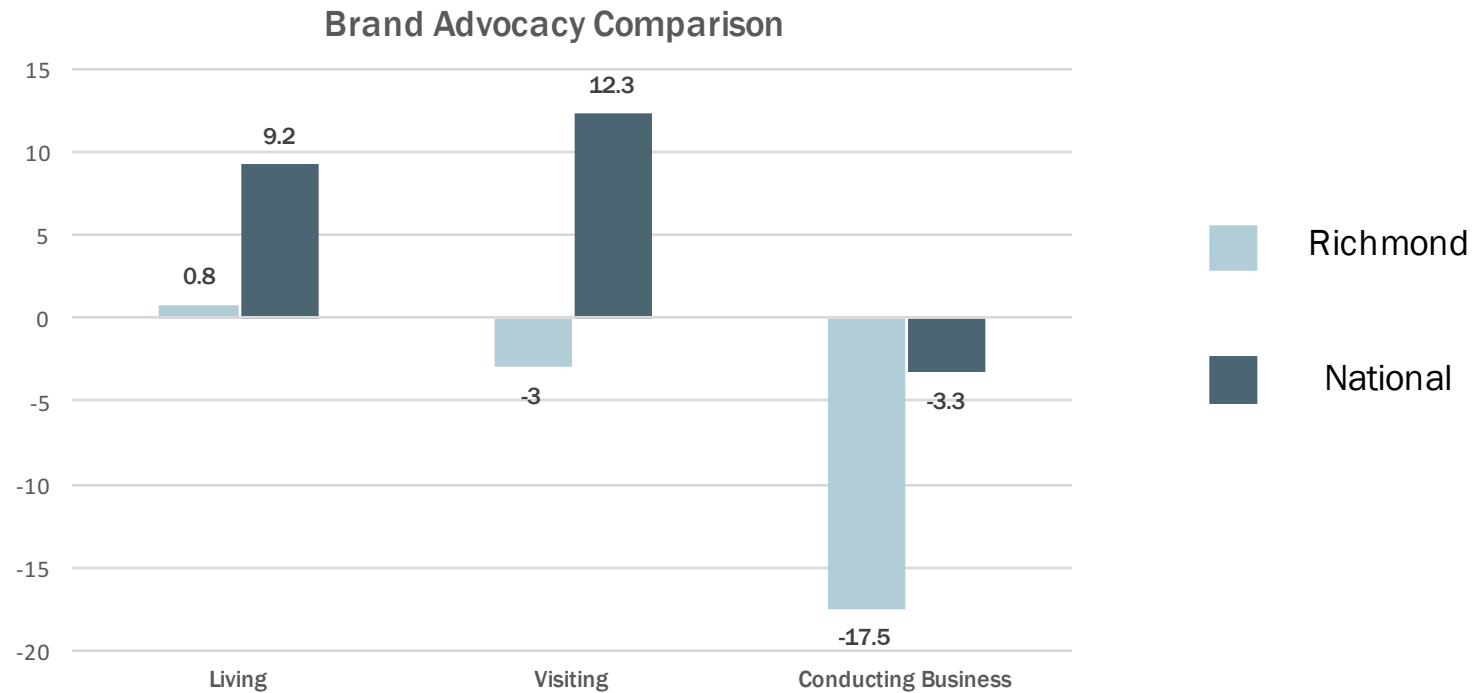
As a place to conduct business



Brand Barometer

Brand Advocacy Score = % Promoters – % Detractors

When removing the Passives category, Richmond performs below the average in every category.



CONSUMER AWARENESS & PERCEPTION STUDY

Purpose

The purpose of this study is to gain insight into consumer awareness, visitation and perceptions of Richmond. The survey measures:

- Overall top-of-mind perceptions of Richmond and immediate competitors
- Consumer visitation trends (frequency and nature of visitation)
- Consumer visitation drivers (business, leisure, friends, and family)
- Strengths and weaknesses of Richmond with identified community attributes
- Measurements of Richmond quality of life indicators
- Measurement of Richmond strengths and weaknesses as a place to do business

Methodology & Results

An Internet study was conducted among respondents in the San Francisco-Oakland-Hayward MSA.

A total of **205** surveys were collected allowing for a margin of error +/- 6.68 at the 95% confidence level. 187 respondents were terminated from the survey, resulting in a termination rate of 48%.

Because the point of this study is to gain outside perspective, one of the terminating factors was being a resident of Richmond.

See **Appendix C** on the Final Report CD for the complete CAP Study results.

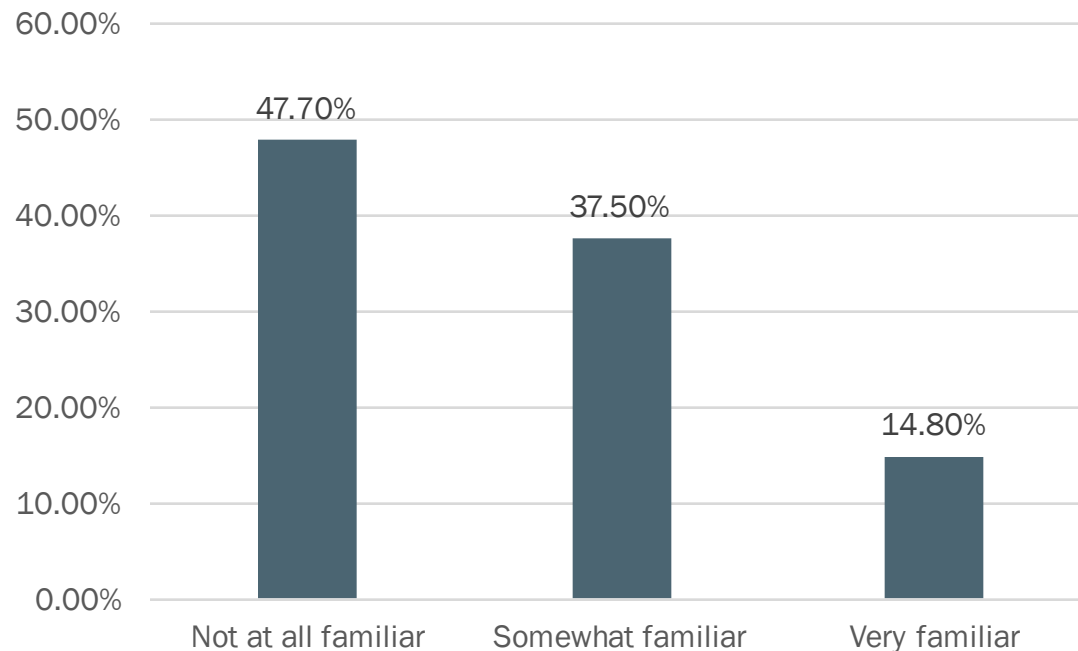
CONSUMER AWARENESS & PERCEPTION STUDY

We examined the responses for several questions relative to the particular responses to other questions in this study. This process of cross-tabulation is a type of analysis that looks at the variability of a characteristic between two or more groups. In other words, it compares opinions, behaviors, perceptions, etc. between different types of people (respondents). Crosstabulating data reveals much more detailed information than simply presenting the means, or averages, of an aggregated set of data. We have shared the most compelling cross-tabulations in the following pages. We present the question and responses in aggregate form followed by the detailed cross-tabulations.

CAP Study

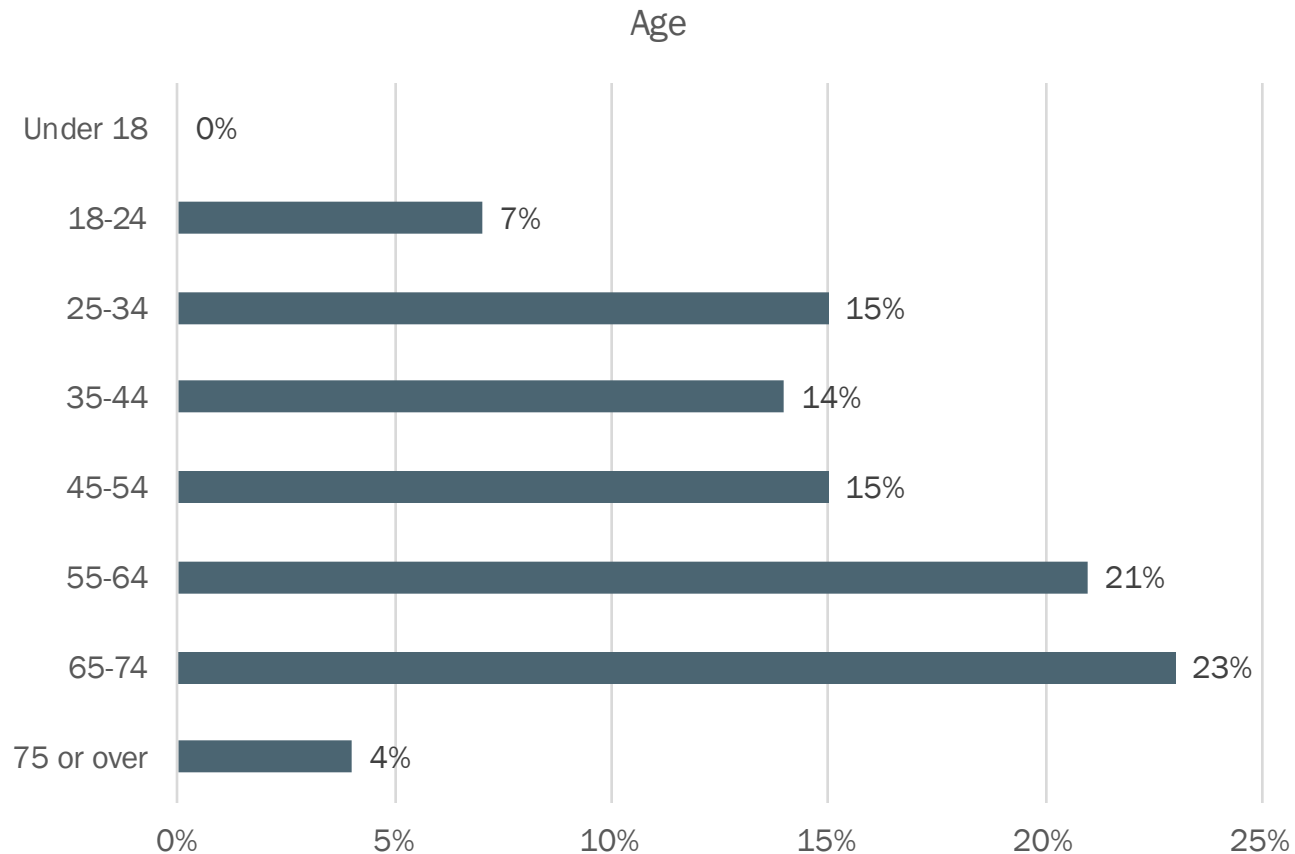
RESPONSE OVERVIEW

- Lack of familiarity was the terminating factor for the survey
- 187 respondents were not at all familiar with Richmond and therefore were terminated from the survey
- The termination rate was 48%, which is above average
- Of those not terminated 71.71% were somewhat familiar and 28.29% were very familiarity
- 205 responses were collected for the CAP Study



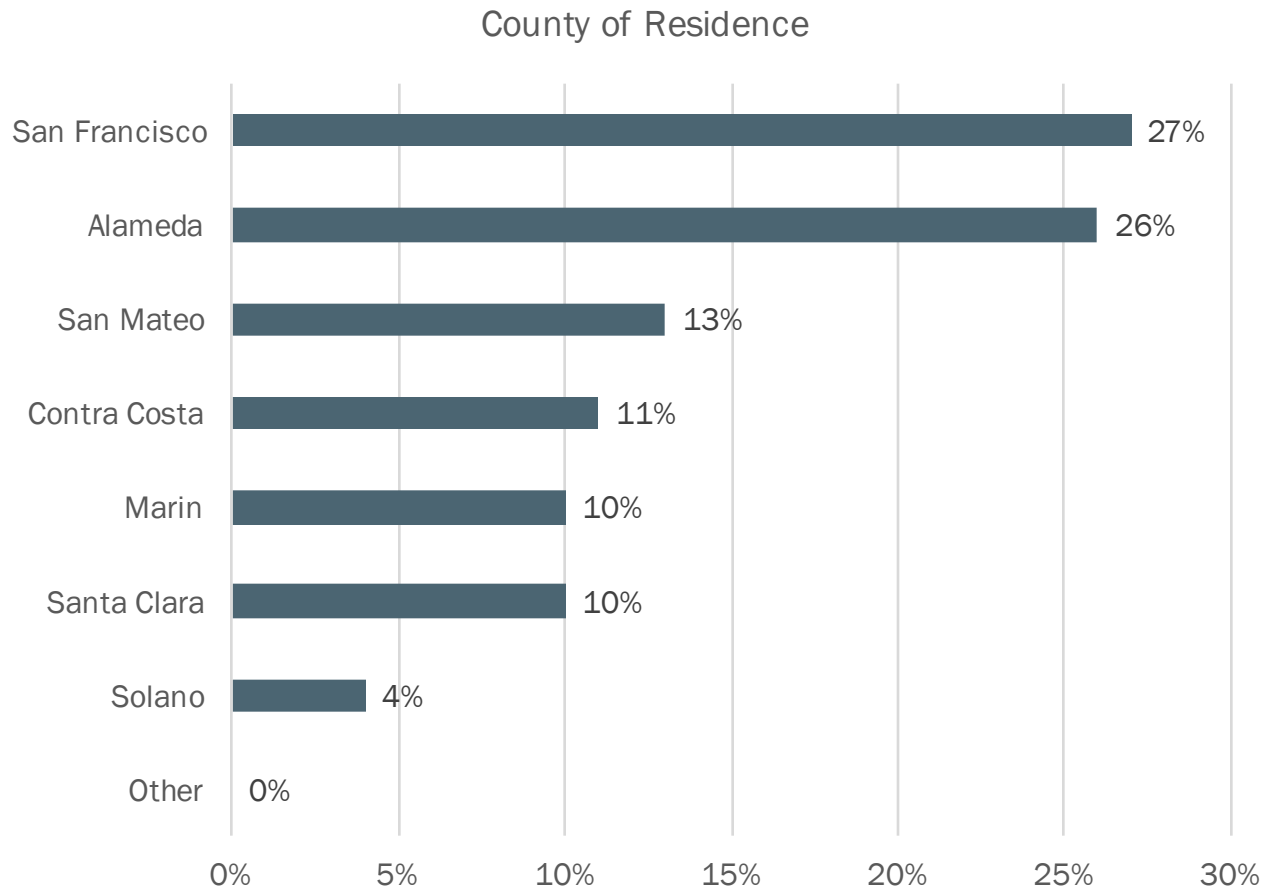
CAP Study

RESPONDENT DEMOGRAPHICS



CAP Study

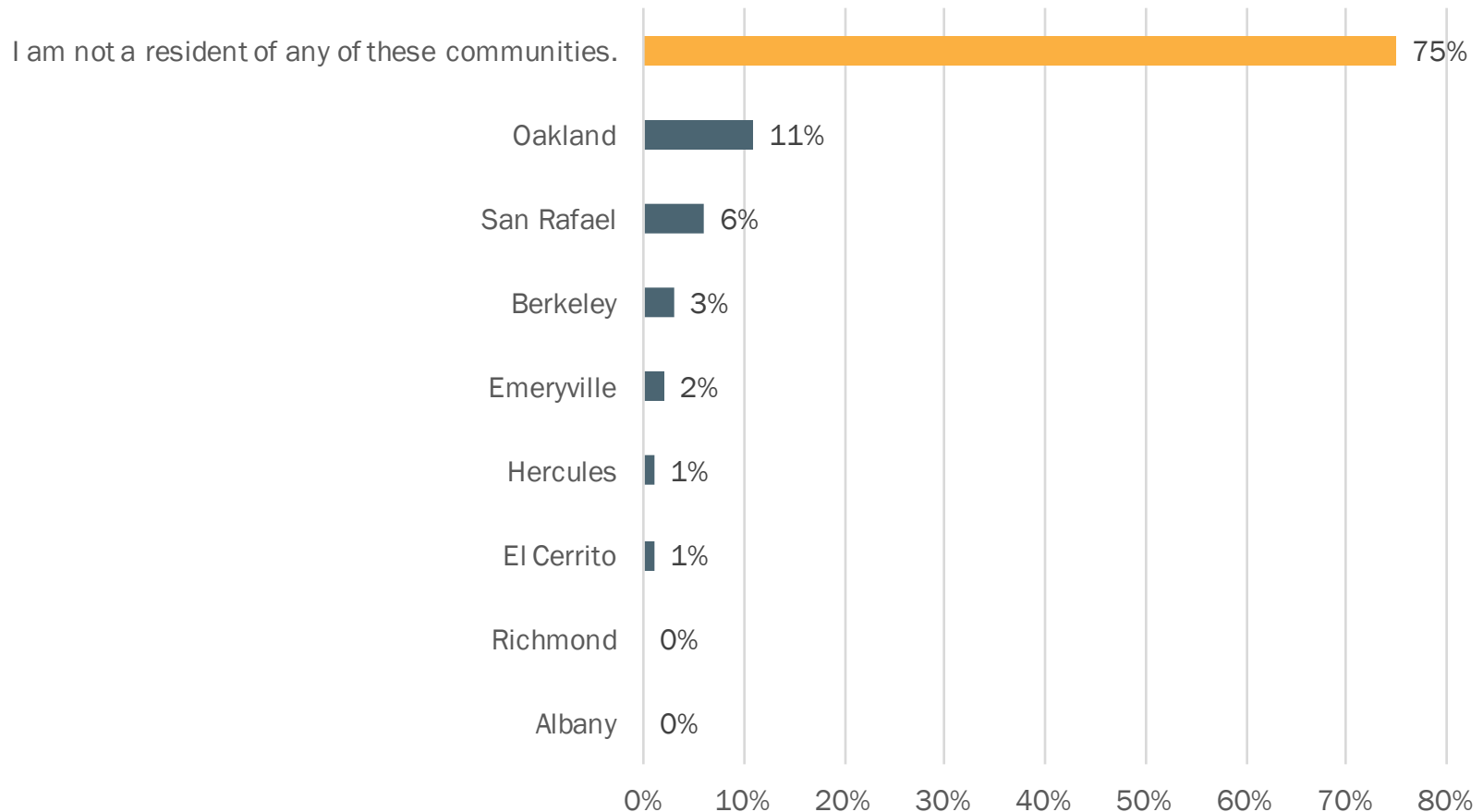
RESPONDENT DEMOGRAPHICS



CAP Study

RESPONDENT DEMOGRAPHICS

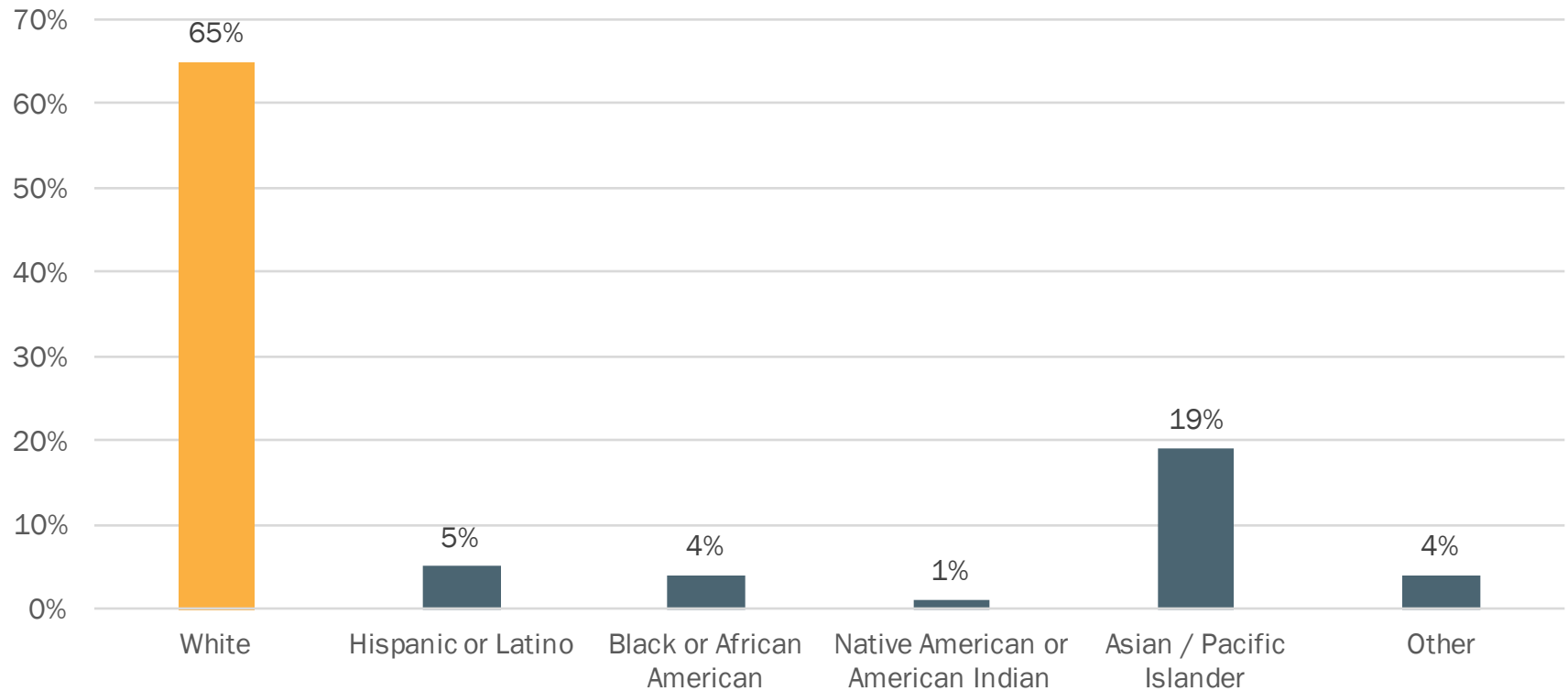
Community of Residence



CAP Study

RESPONDENT DEMOGRAPHICS

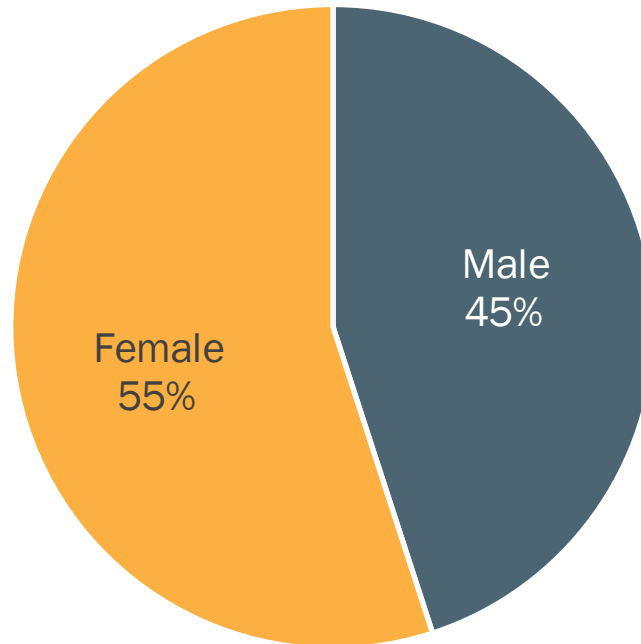
Ethnicity



CAP Study

RESPONDENT DEMOGRAPHICS

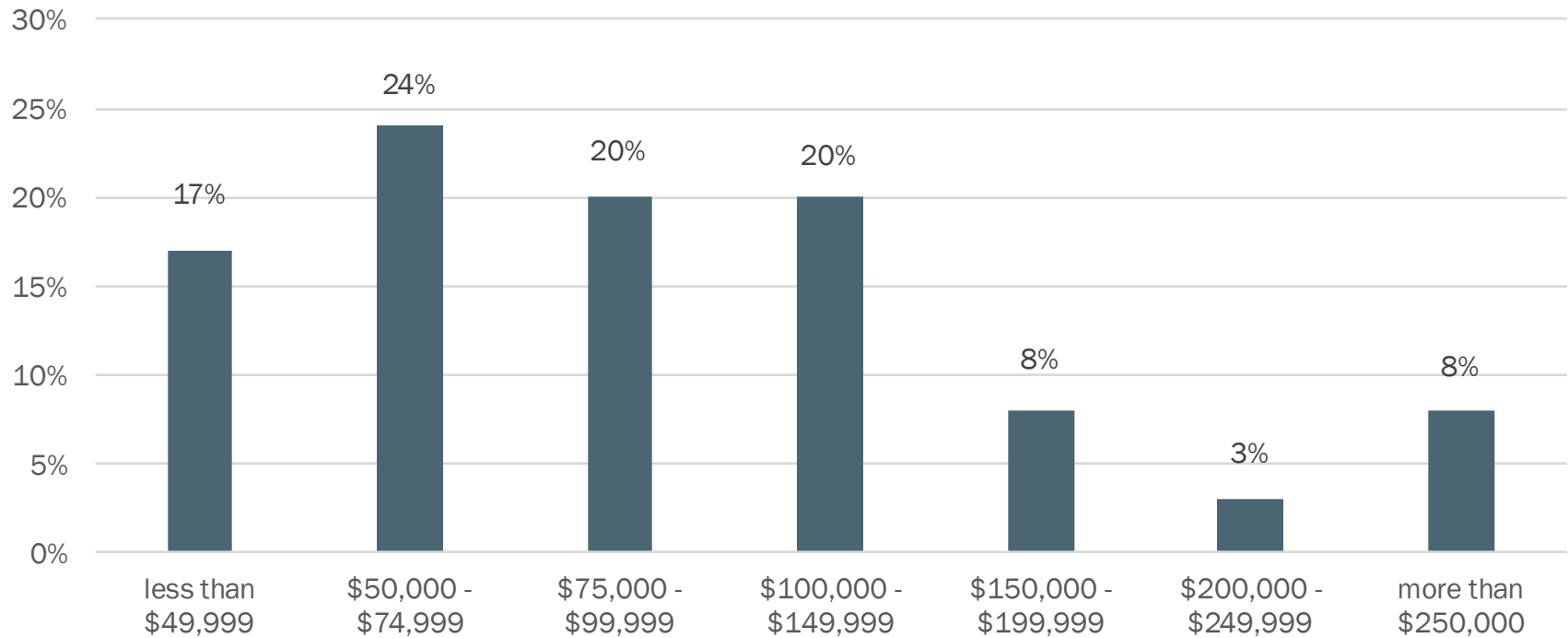
Gender



CAP Study

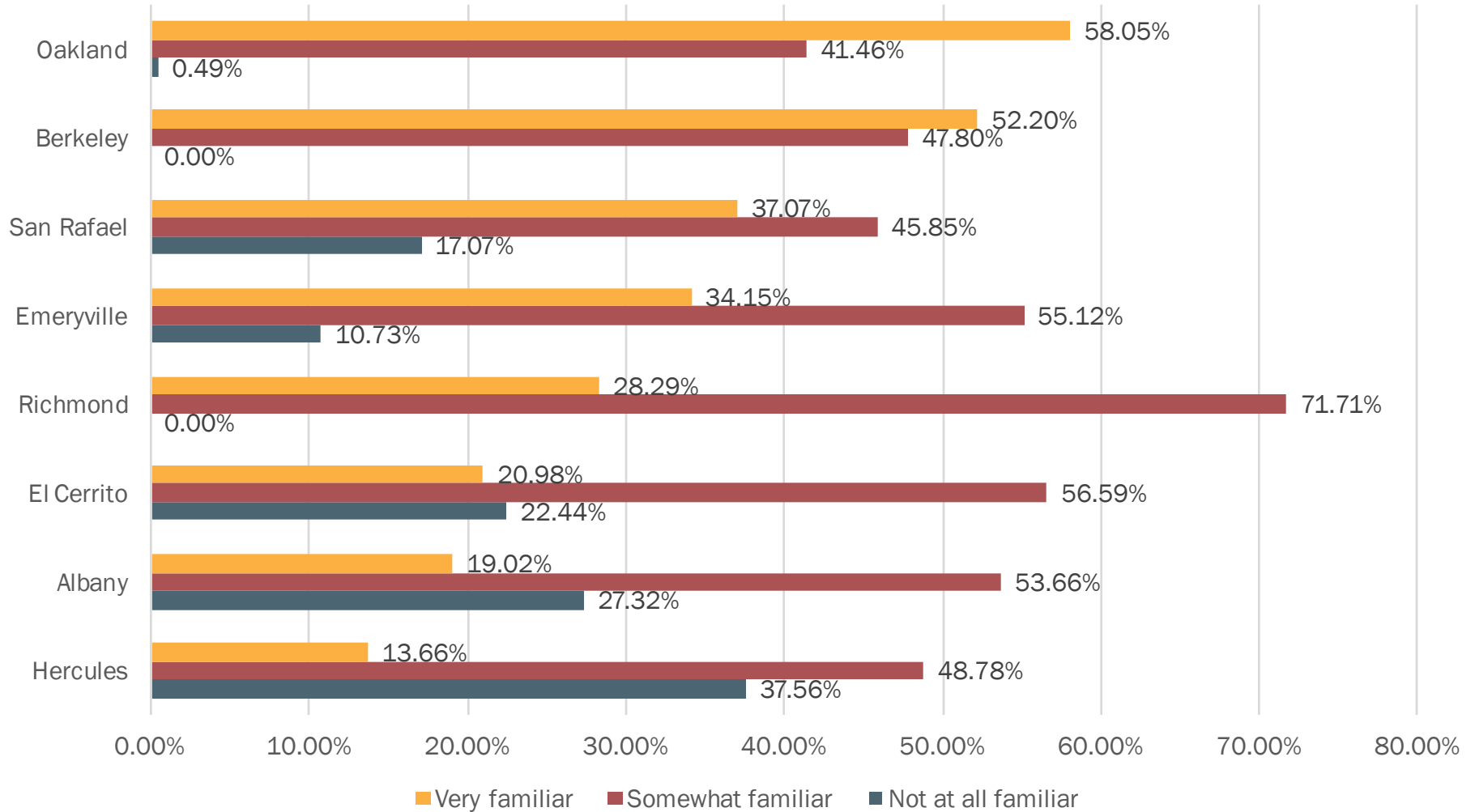
RESPONDENT DEMOGRAPHICS

Average Household Income



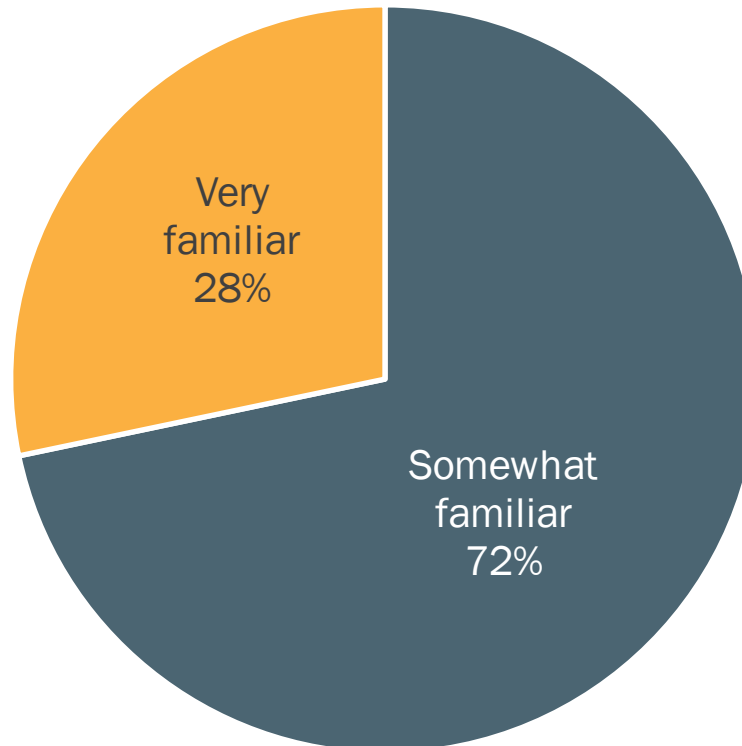
CAP Study

How familiar are you with the following areas?



CAP Study

How familiar are you with Richmond?



CAP Study

COMMUNITY PERCEPTIONS

When you think of the following areas, what comes to mind?

Albany

- East Bay
- Small
- Middle Class

Berkeley

- College
- Hippies
- Progressive/Forward Thinking

El Cerrito

- BART Station
- Suburban/Bedroom Community
- Hilly

Emeryville

- Big Box Stores
- IKEA
- Pixar

Hercules

- Old/Historic
- Far Away
- Oil Refineries

Oakland

- Crime/Dangerous
- Raiders
- Jack London Square

Richmond

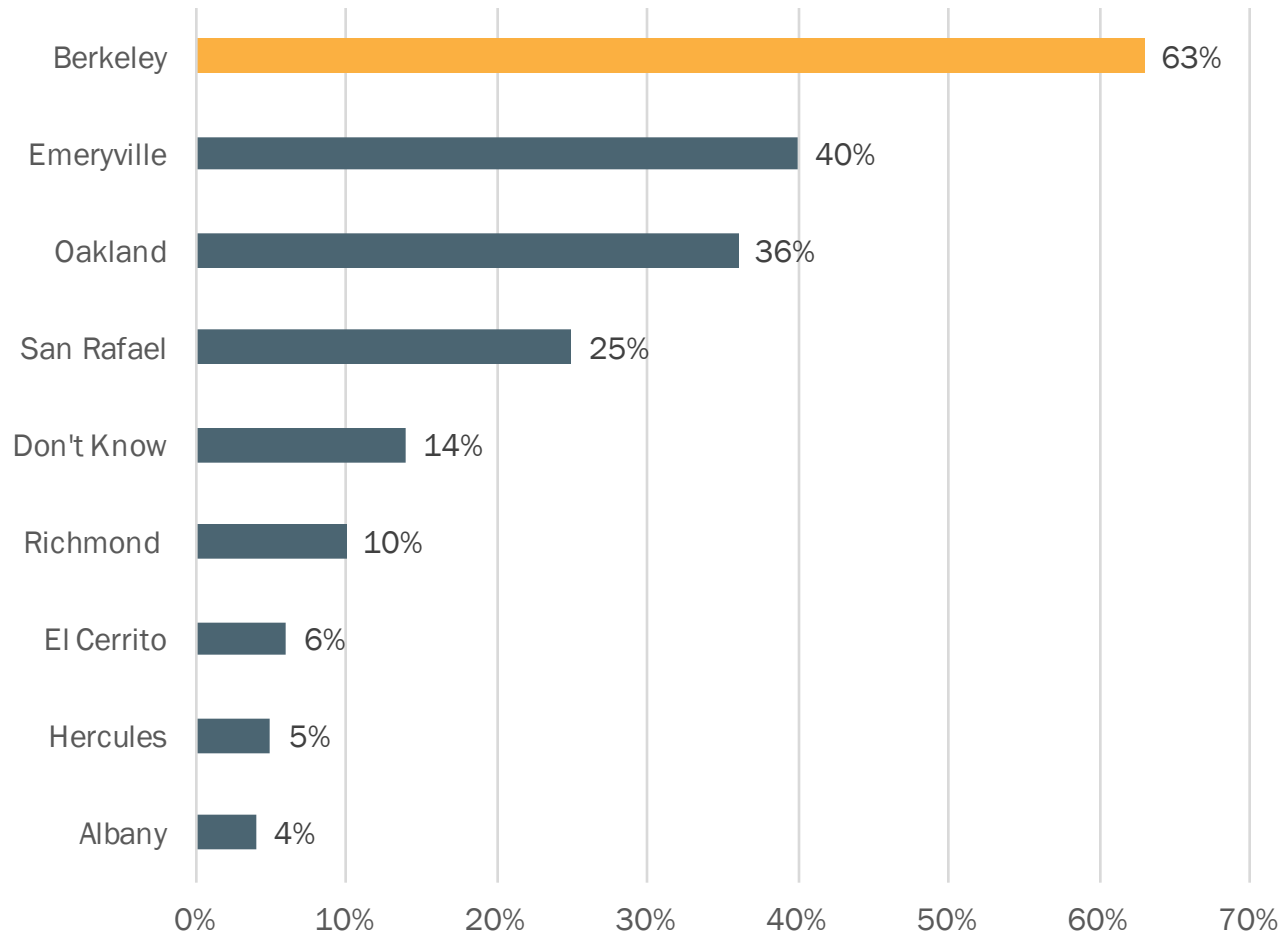
- Bridge
- Violence/Crime
- Chevron

San Rafael

- Wealthy
- Bridge
- County Seat

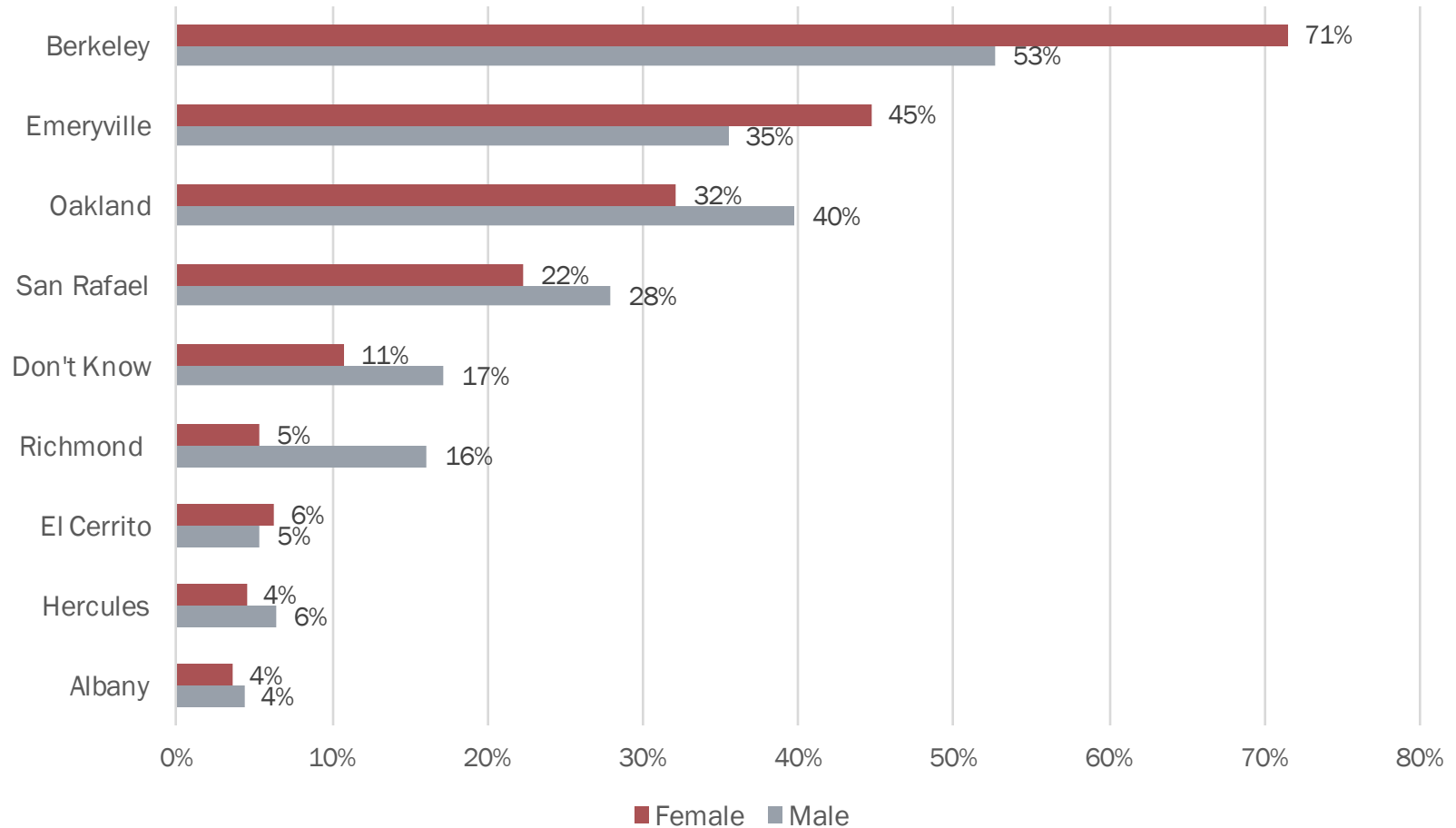
CAP Study

Which communities do you associate as a place for innovative ideas and companies?
Choose all that apply.



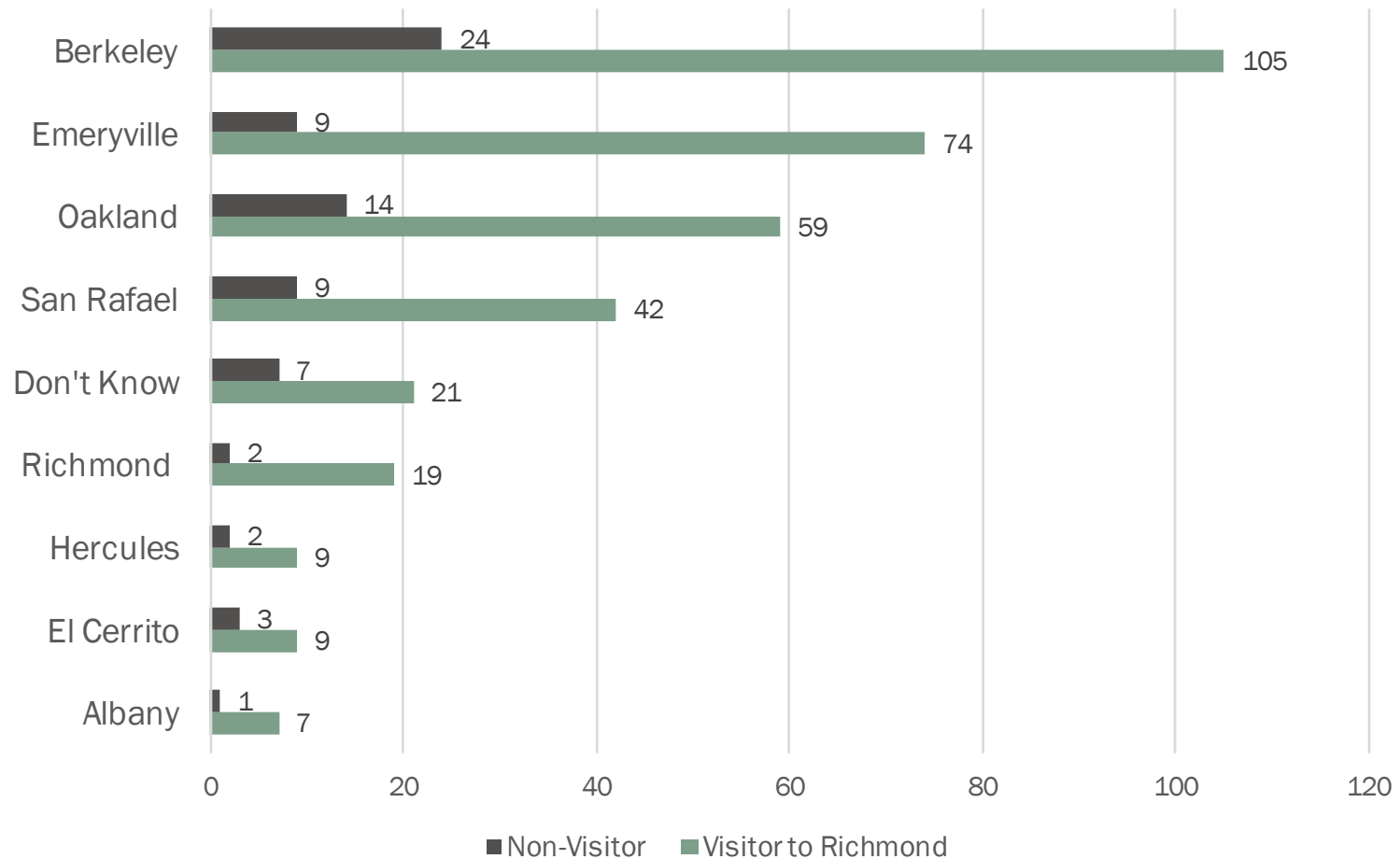
CAP Study

Which communities do you associate as a place for innovative ideas and companies? Choose all that apply.



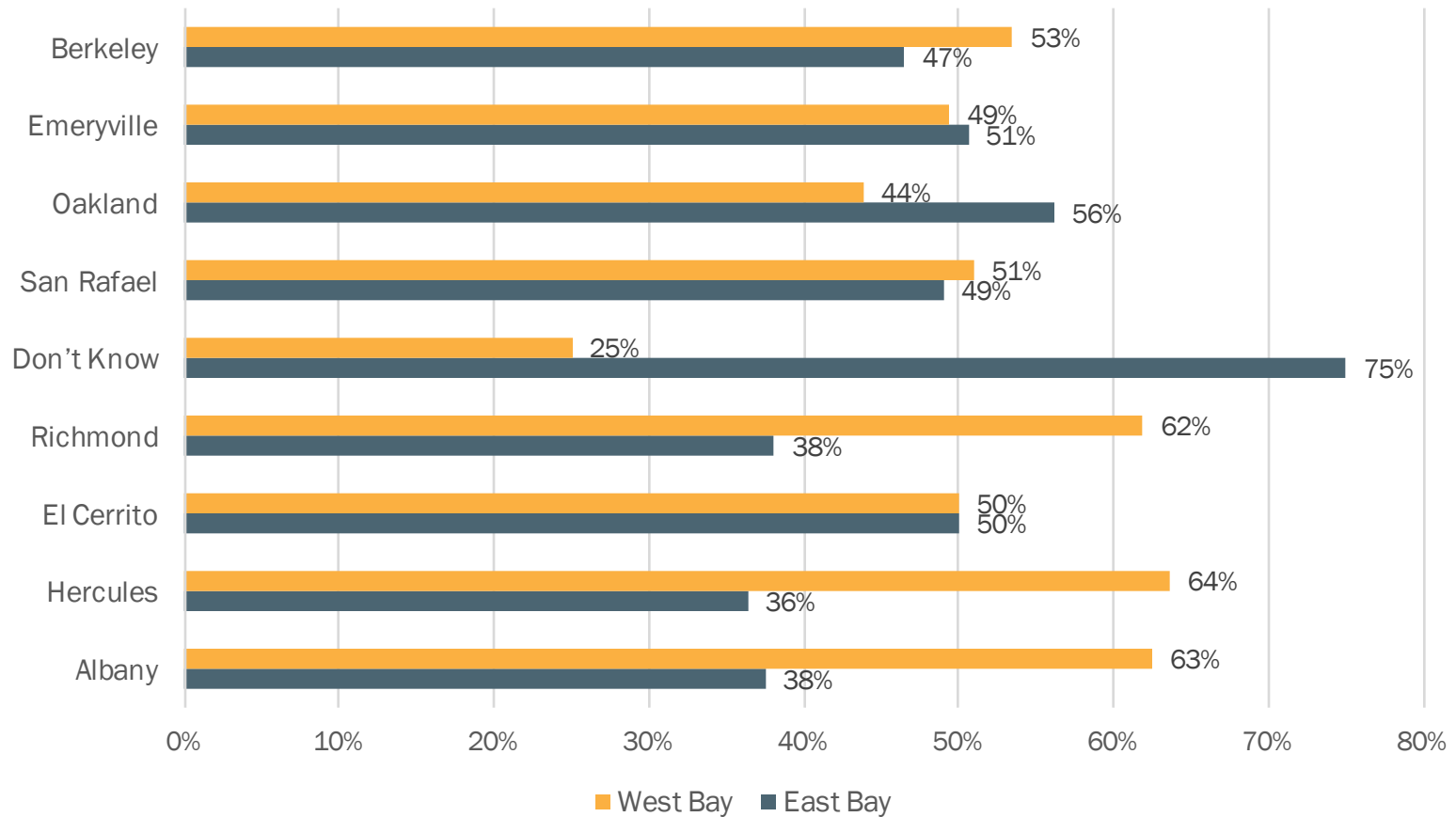
CAP Study

Which communities do you associate as a place for innovative ideas and companies? Choose all that apply.



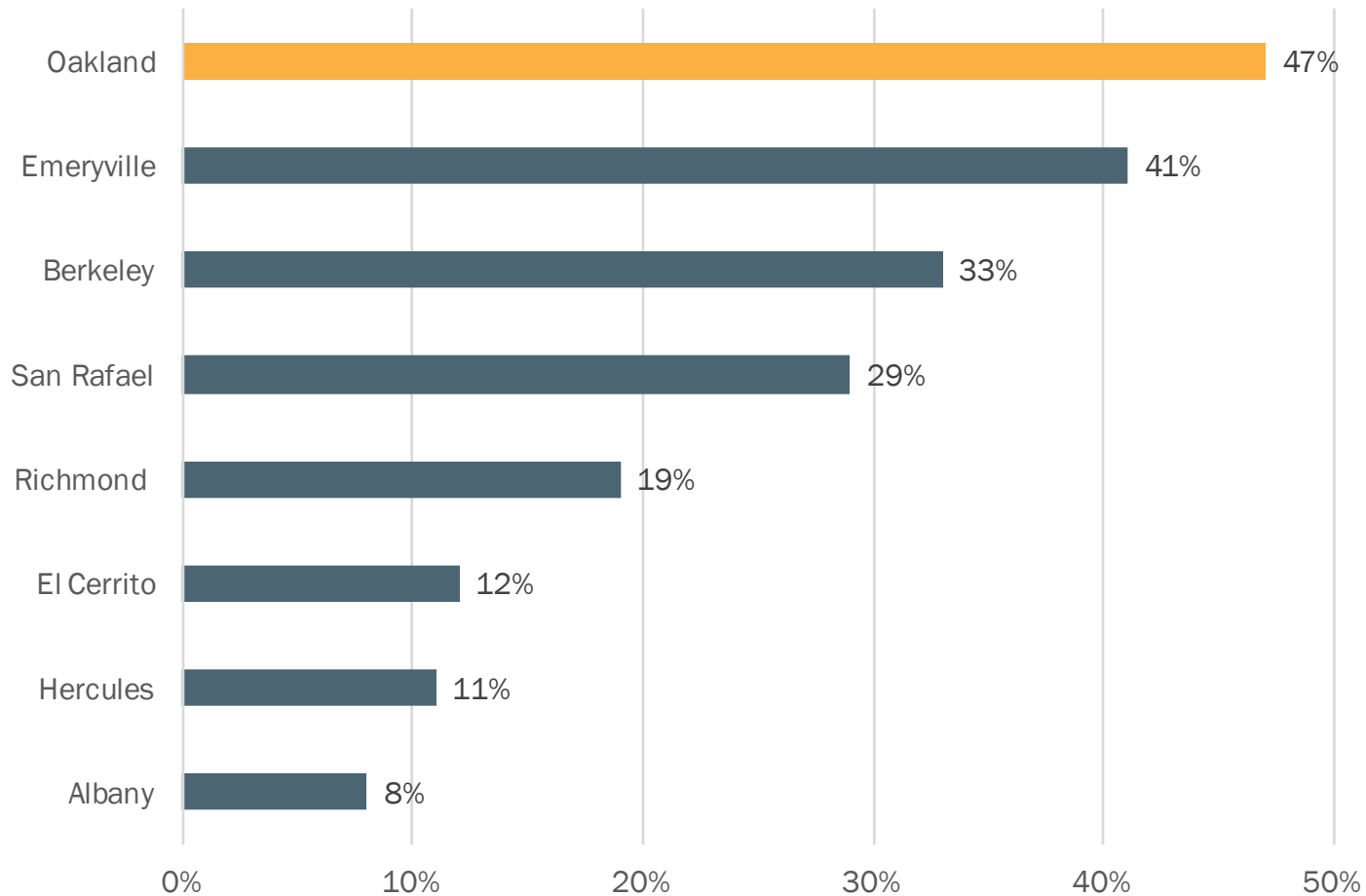
CAP Study

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Choose all that apply.



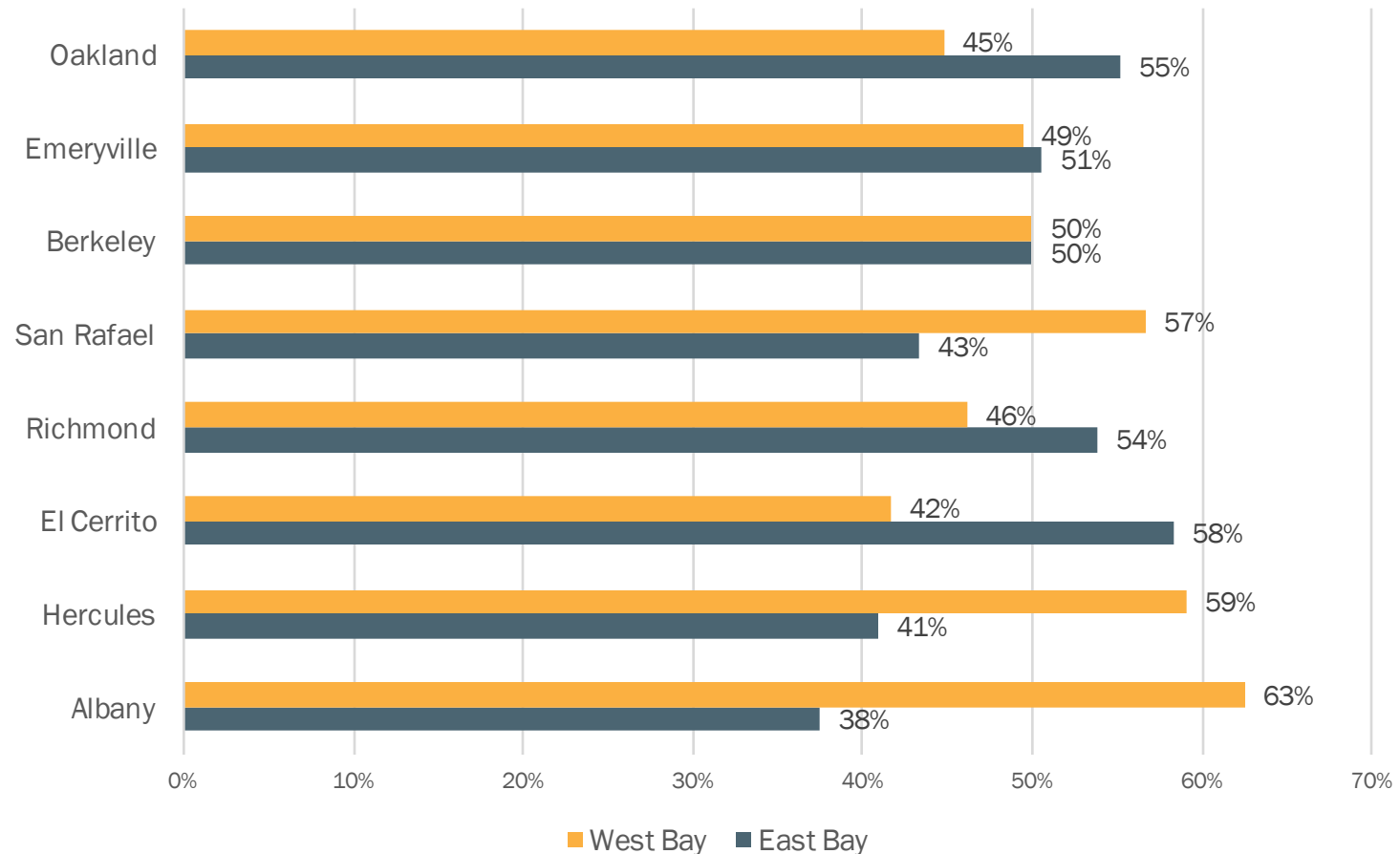
CAP Study

As companies seem to be moving out of San Francisco due to high costs, which community is the best location for minimizing costs/ attracting talent? Choose two answers.



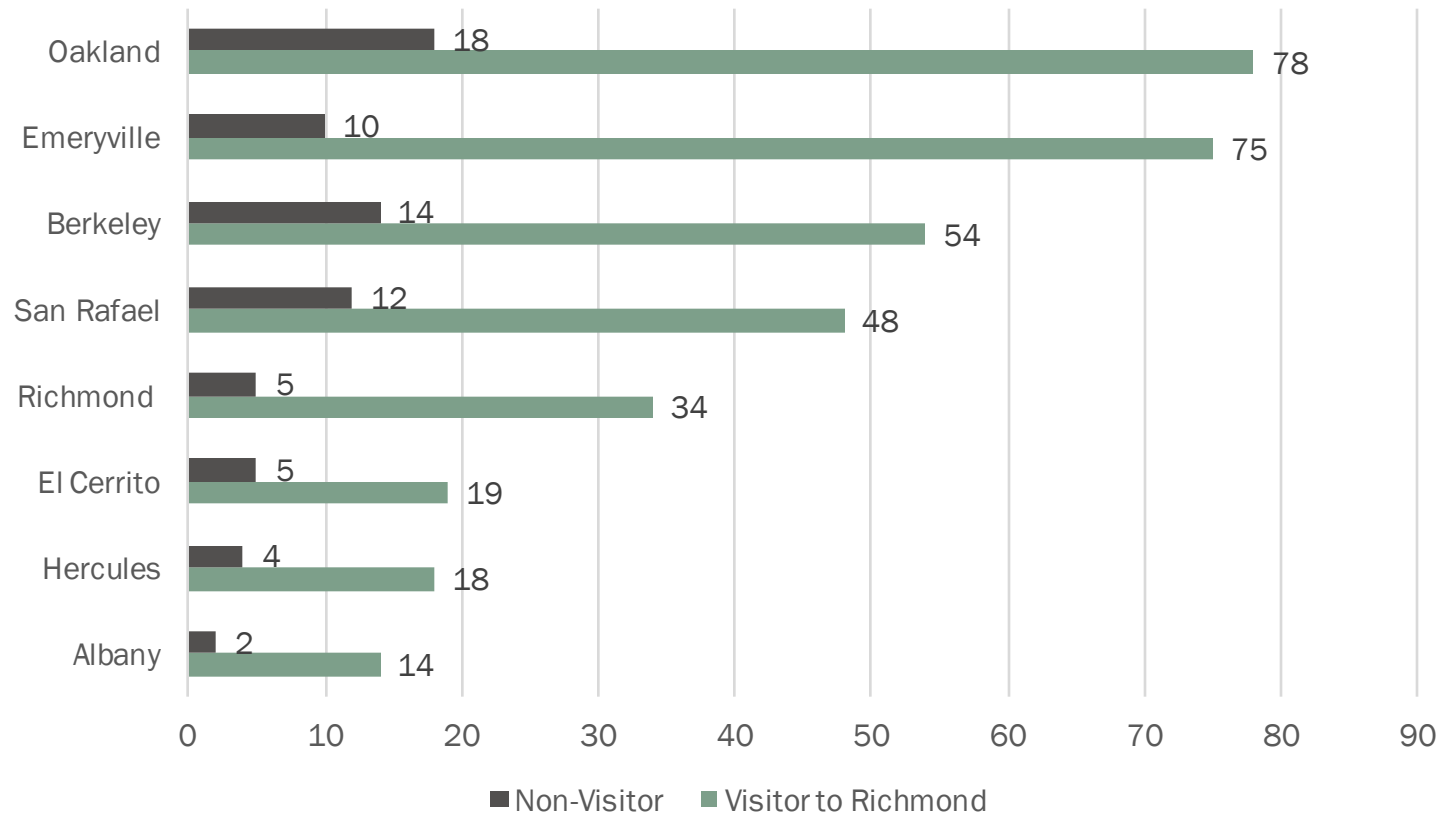
CAP Study

As companies seem to be moving out of San Francisco due to high costs, which community is the best location for minimizing costs and retaining/attracting talent?
Choose two answers.



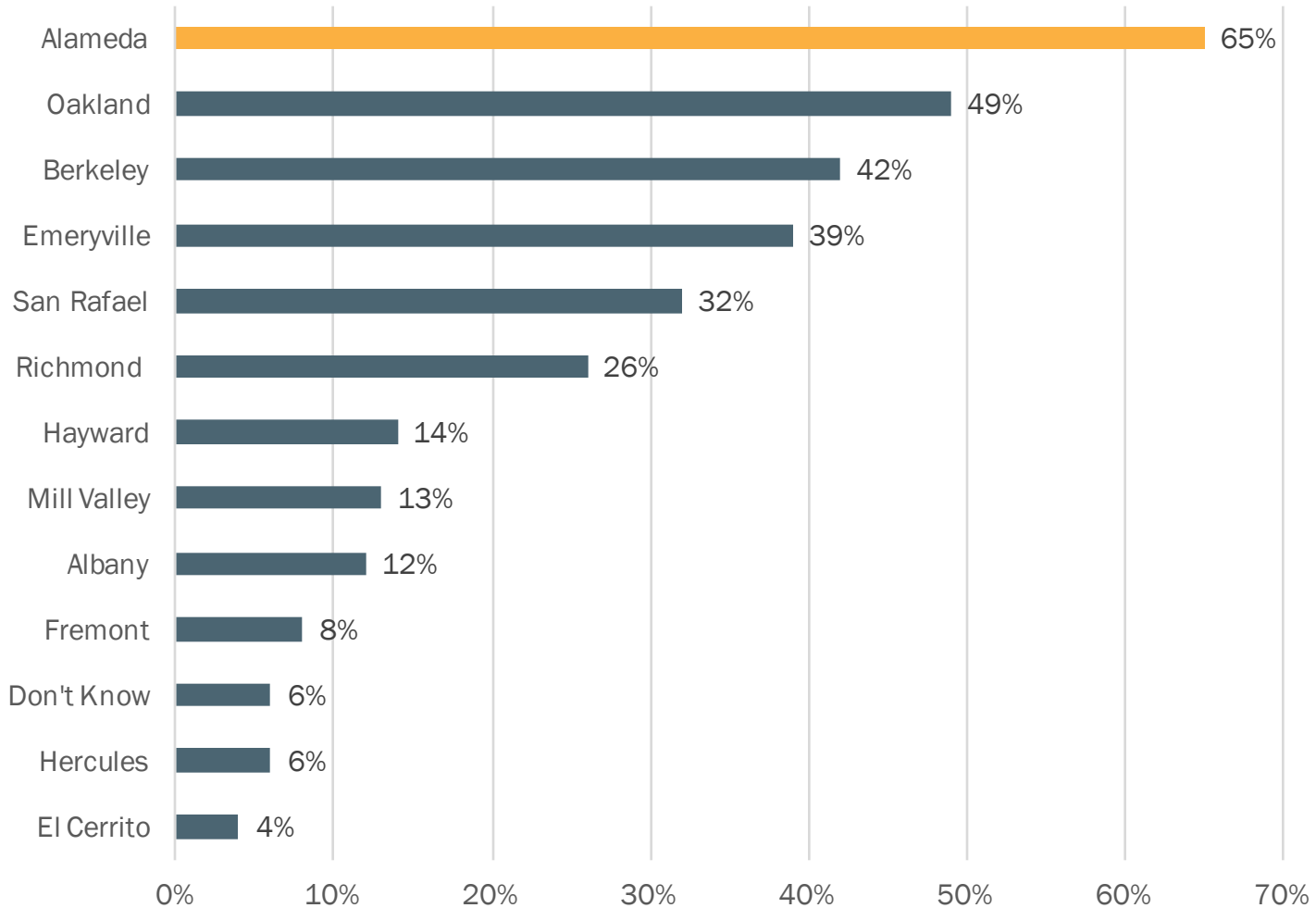
CAP Study

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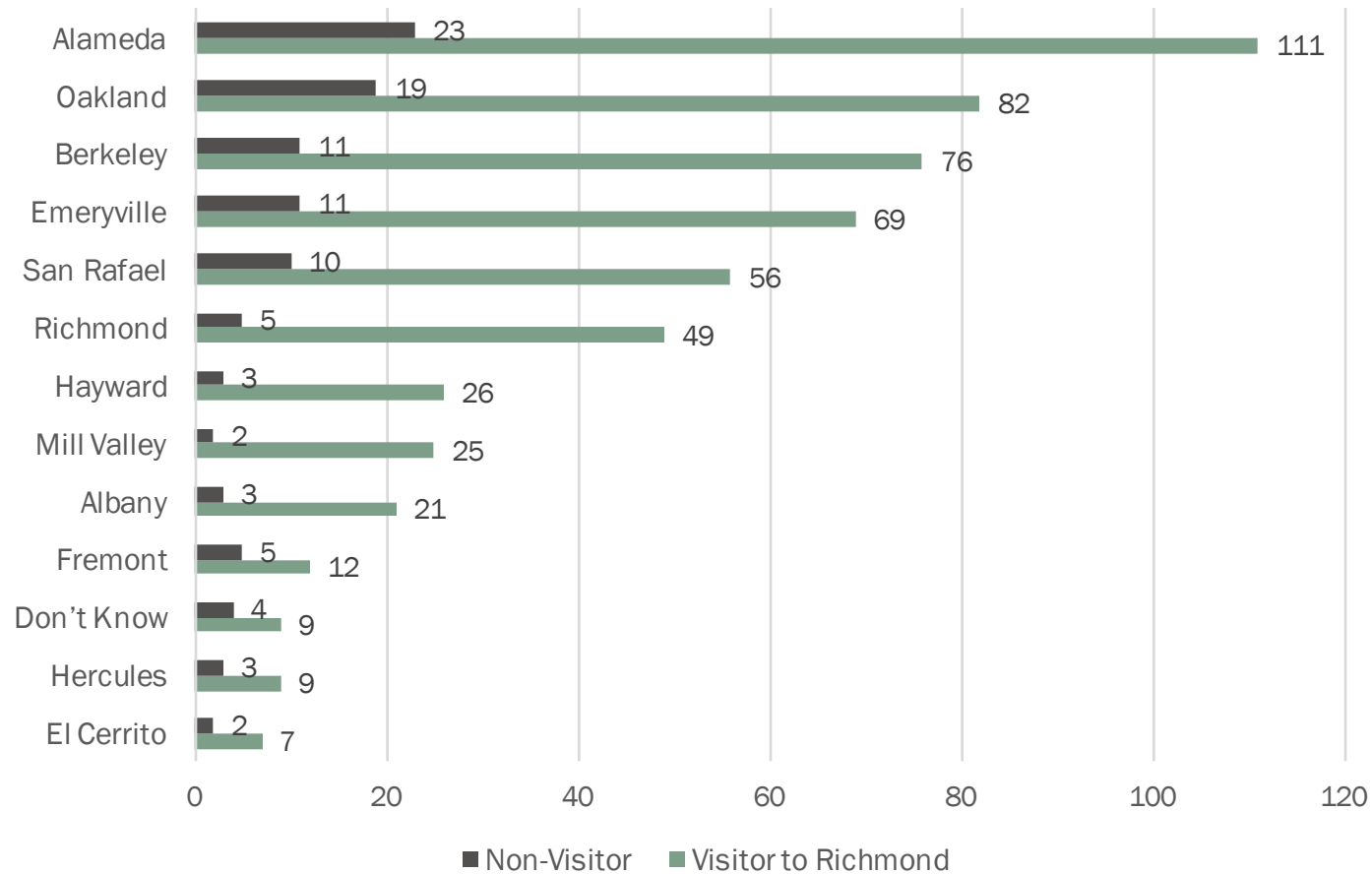
CAP Study

Which communities do you associate with shoreline and waterfront activities? Choose all that apply.



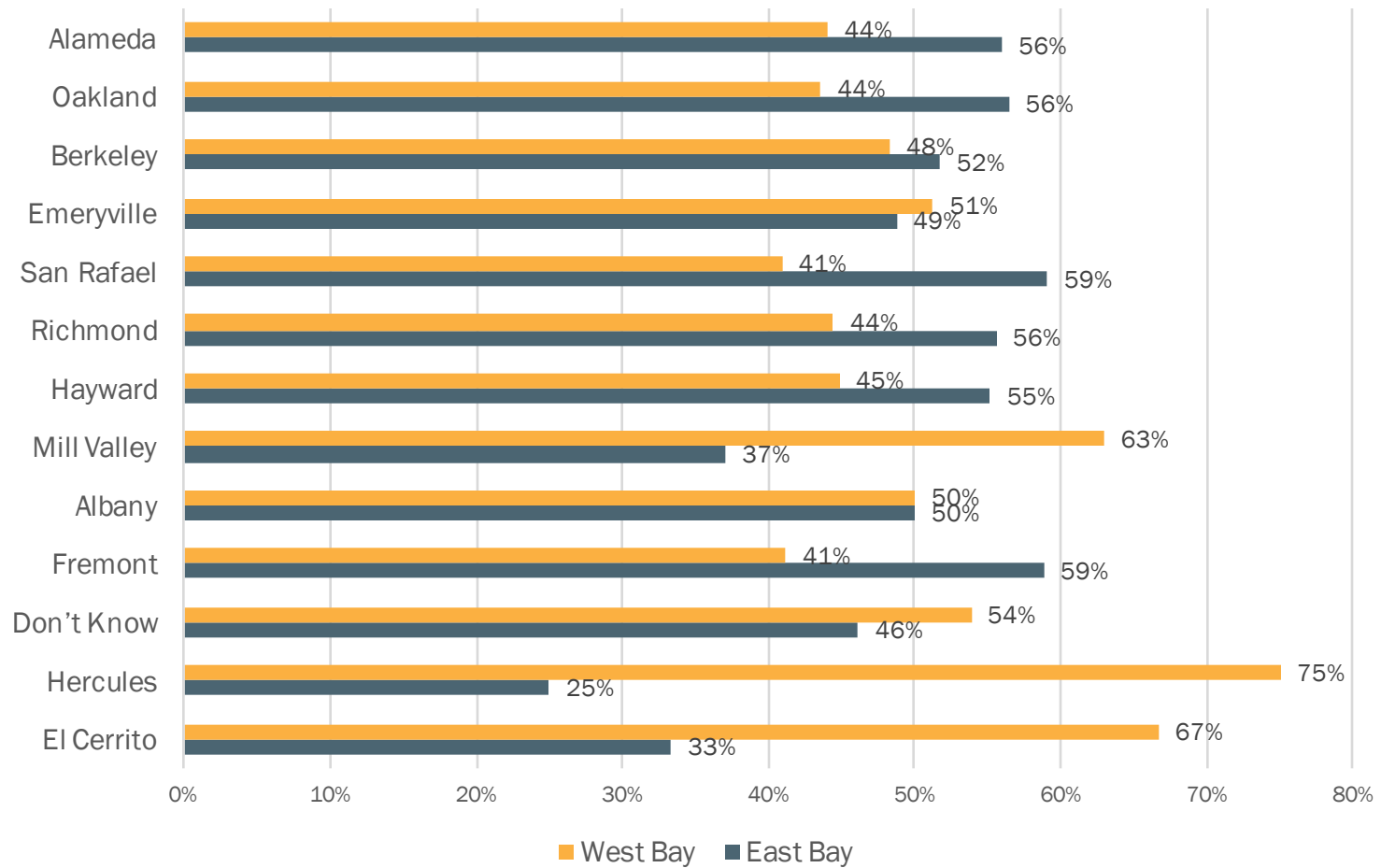
CAP Study

Which communities do you associate with shoreline and waterfront activities? Choose all that apply.



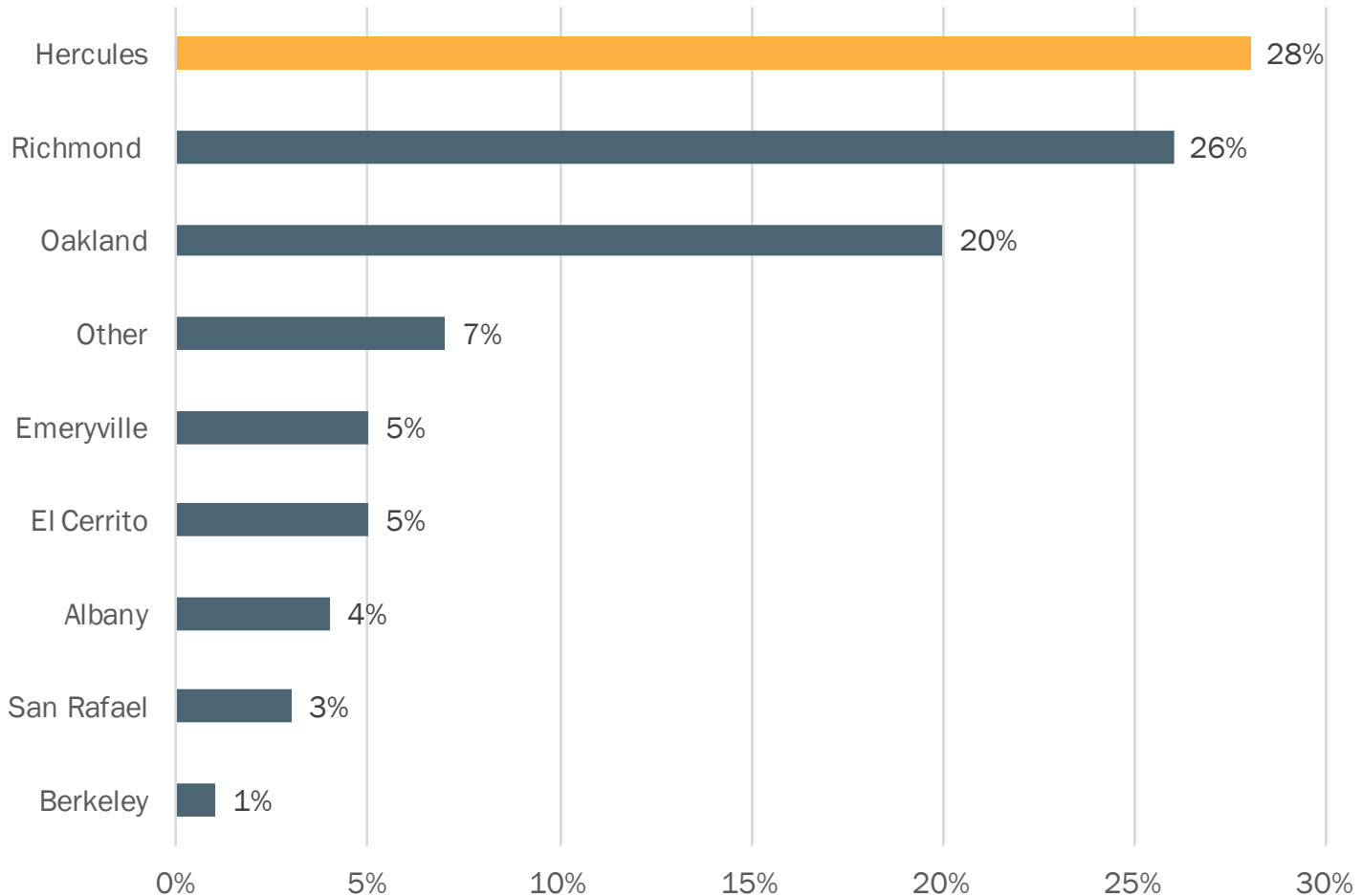
CAP Study

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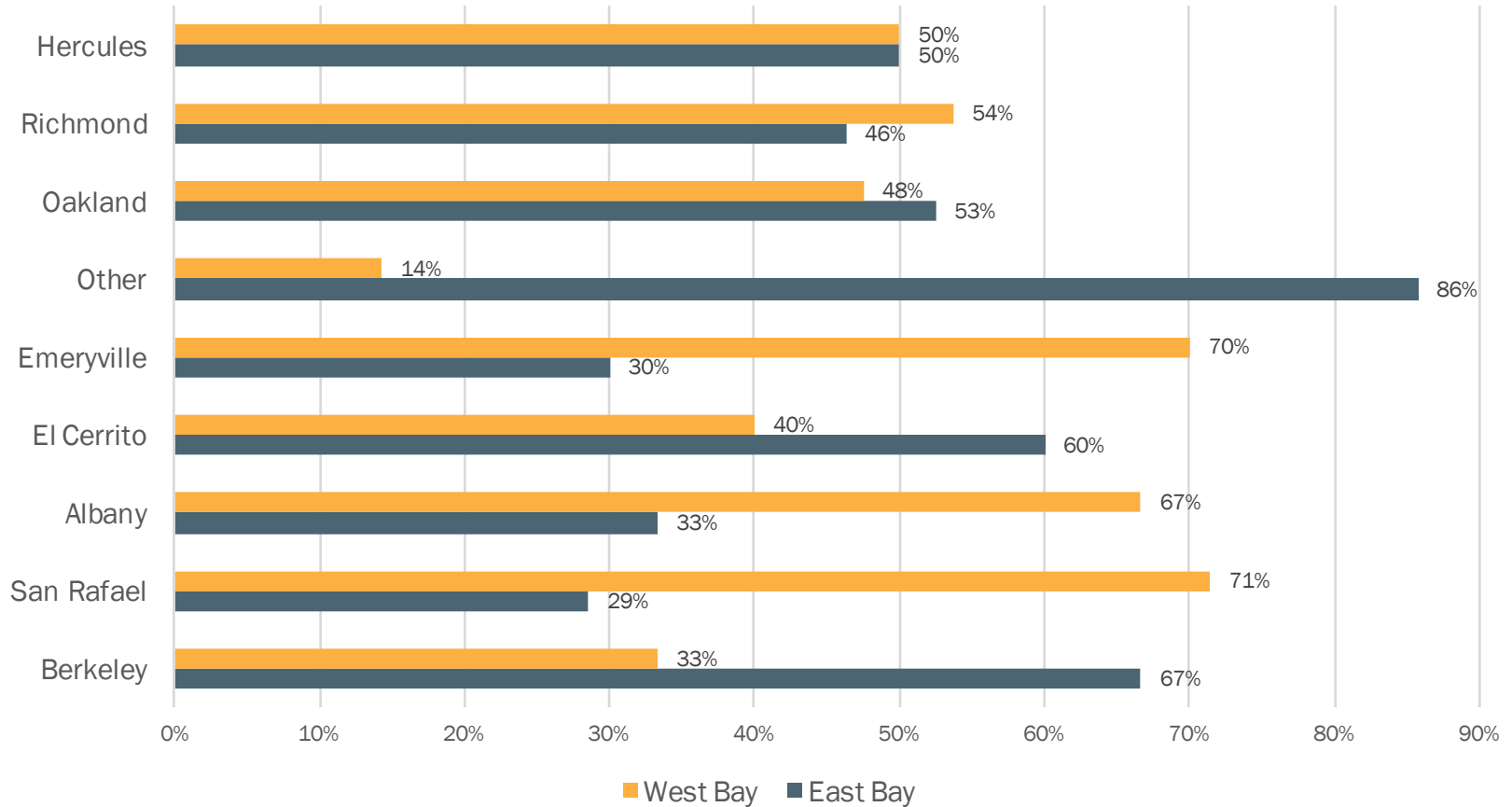
CAP Study

Which community is the most affordable or could be considered the last bargain on the Bay?



CAP Study

Which community is the most affordable or could be considered the last bargain on the bay?

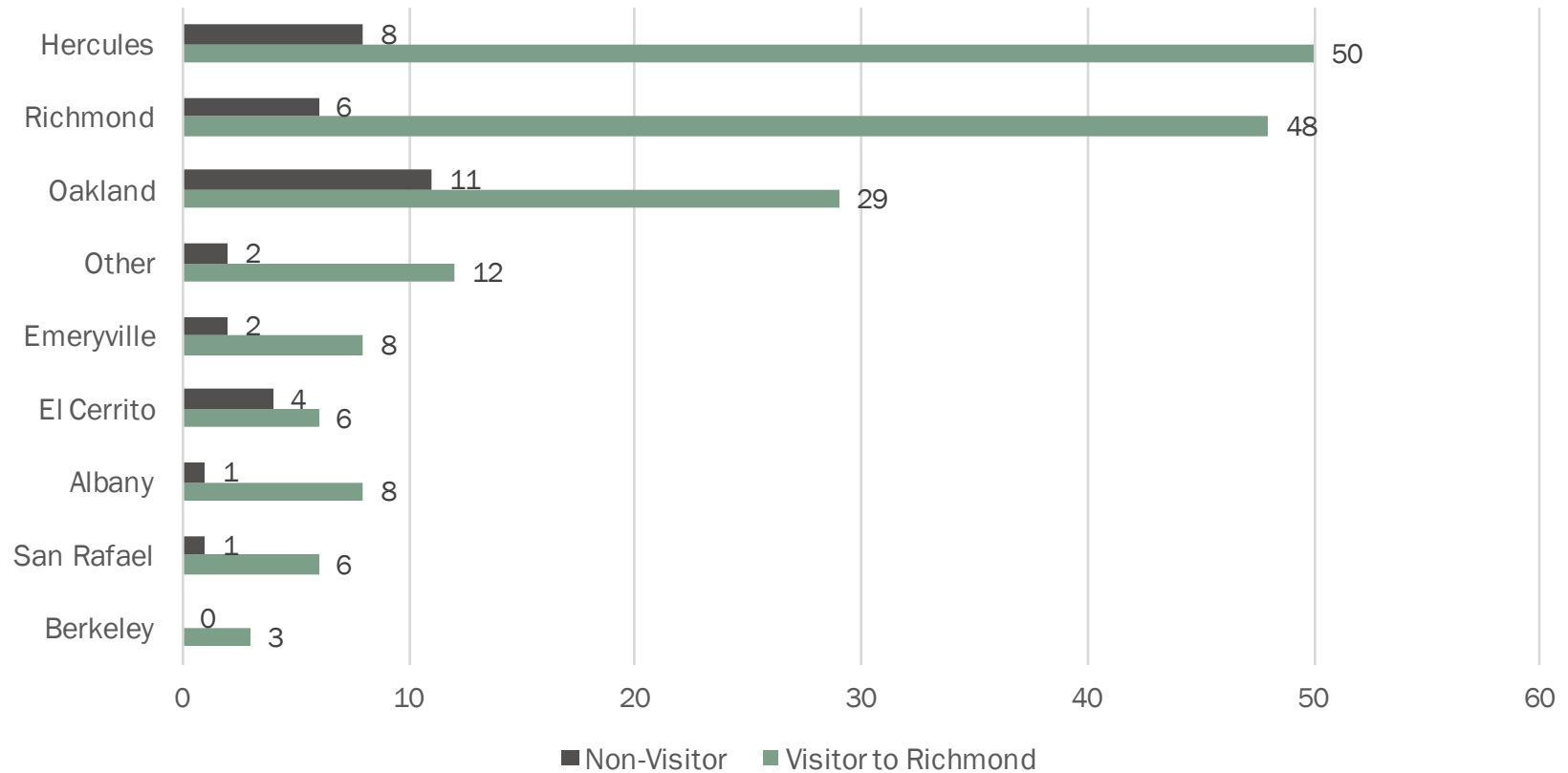


Other: Fremont, Crockett, Hayward, East Palo Alto, Alameda, Vacaville



CAP Study

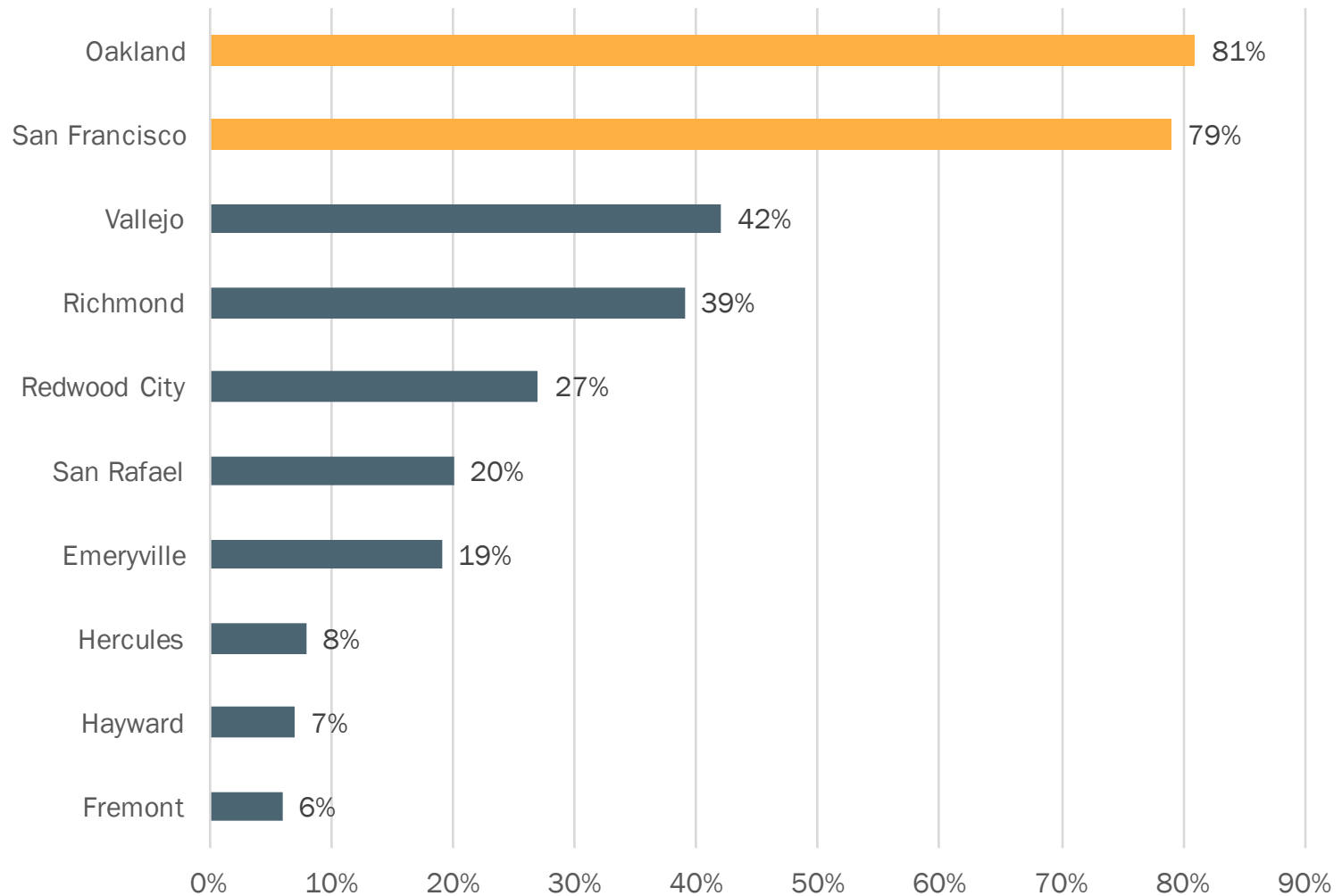
Which community is the most affordable or could be considered the last bargain on the bay?



Other: Fremont, Crockett, Hayward, East Palo Alto, Alameda, Vacaville

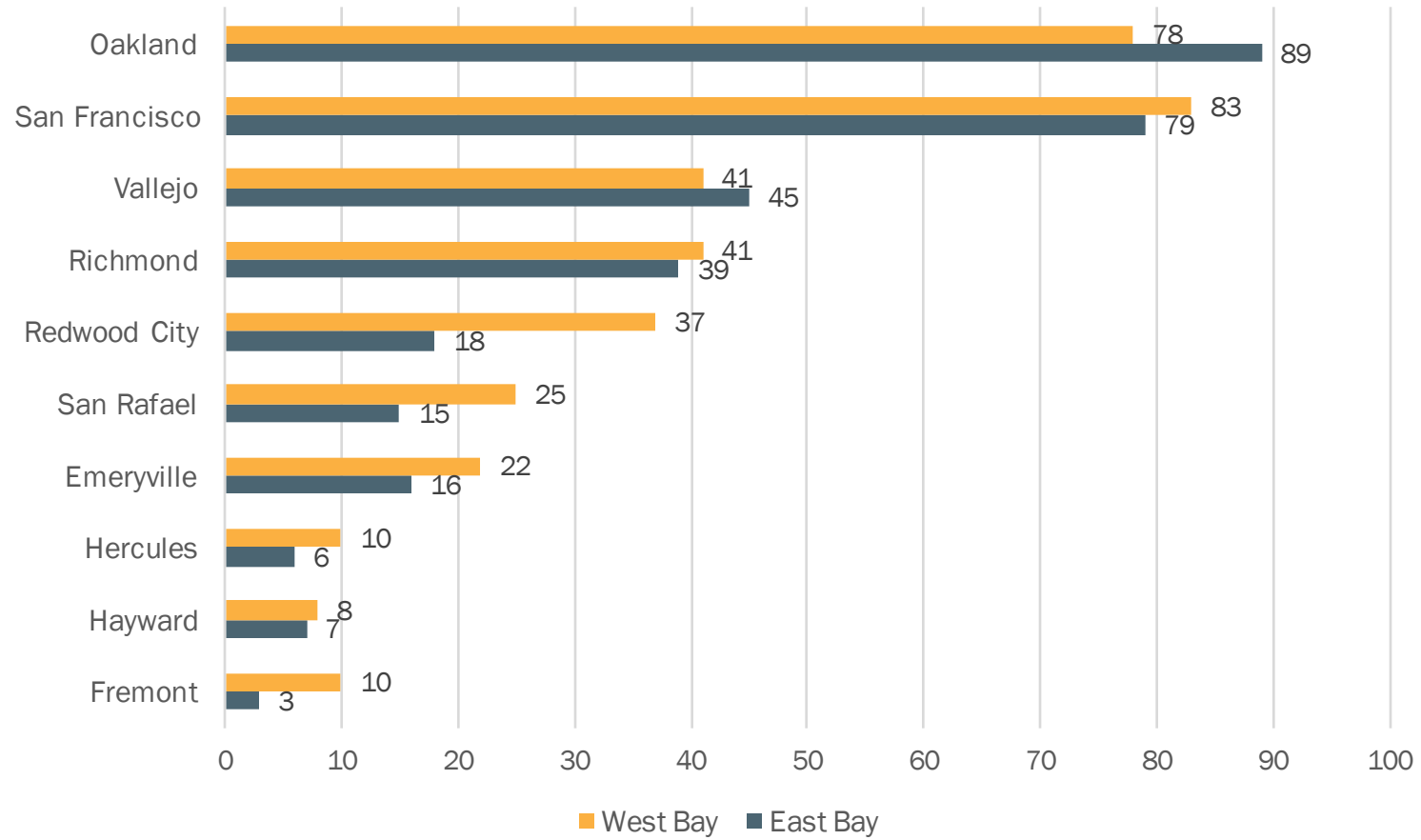
CAP Study

Which communities are home to a seaport in the Bay Area? Choose all that apply.



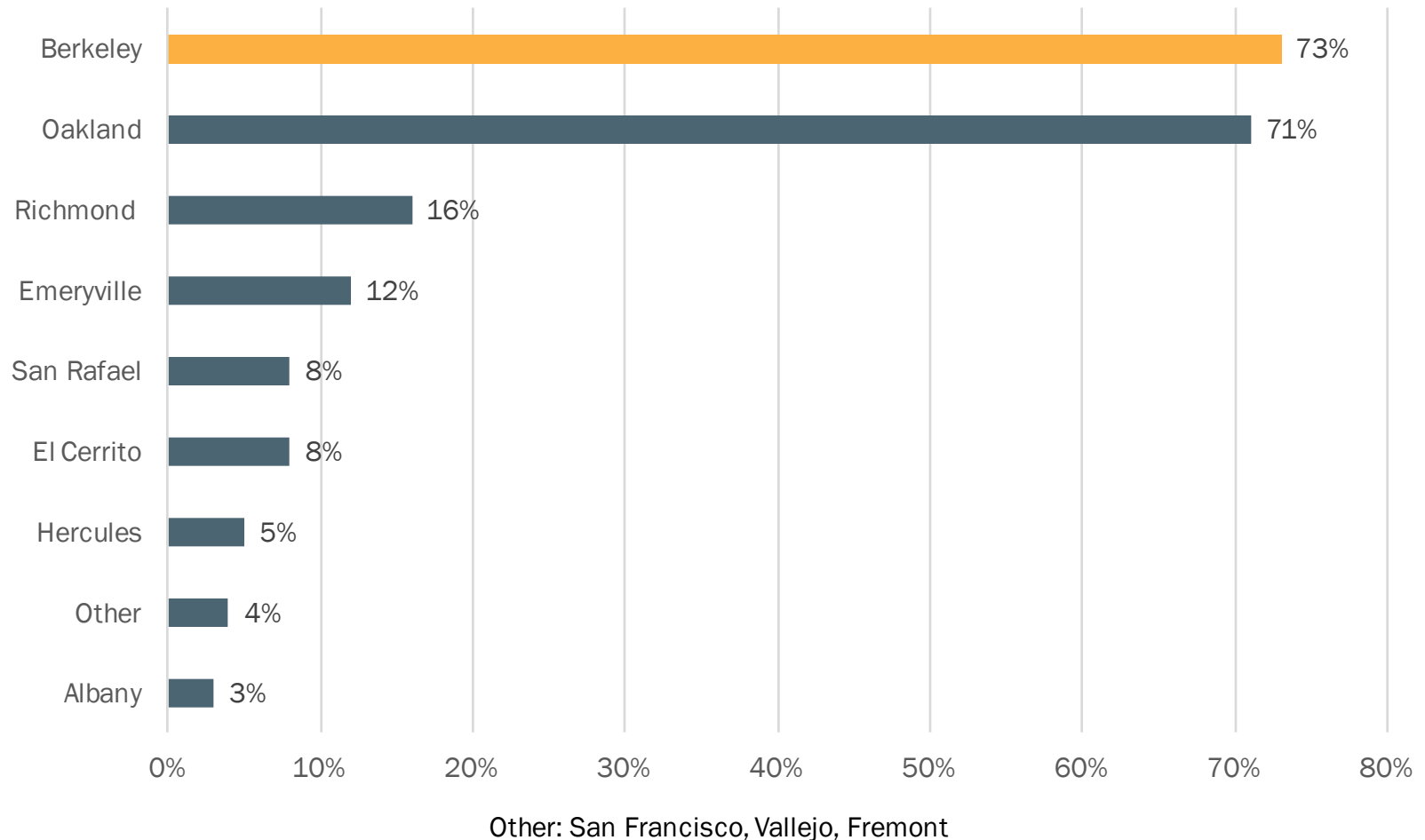
CAP Study

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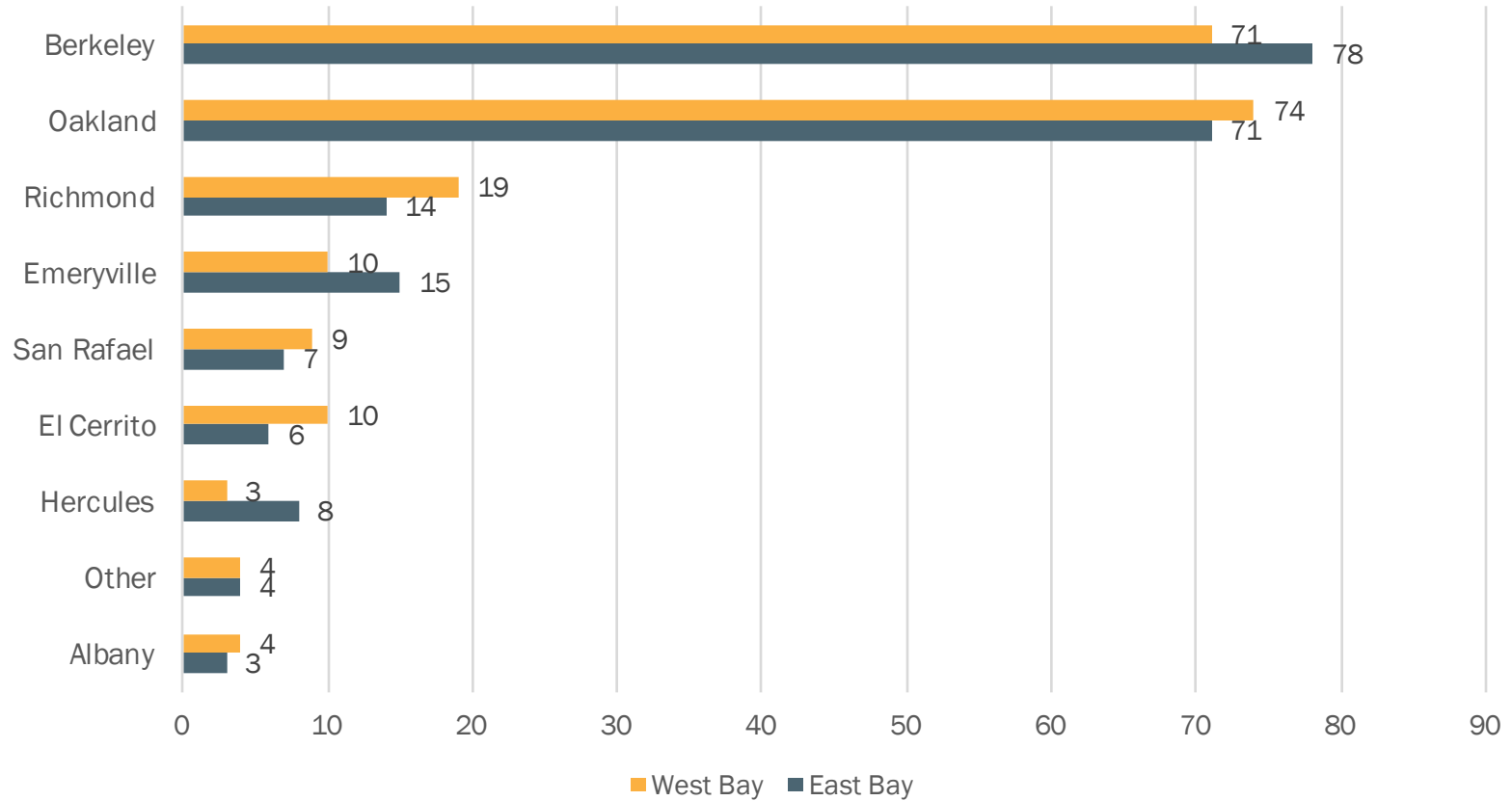
CAP Study

Which of these Bay Area communities do you most associate with diversity? Choose two answers.



CAP Study

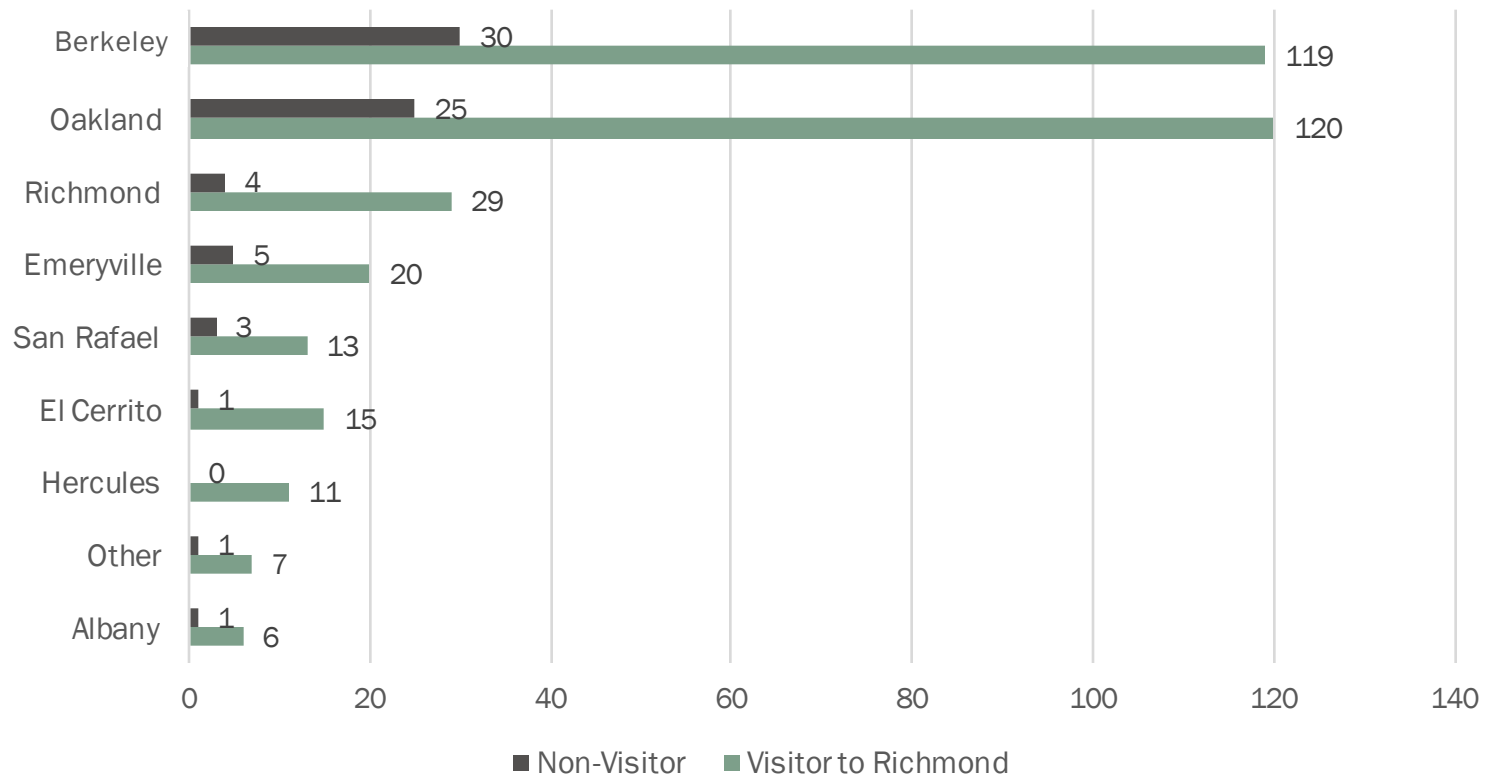
Which of the Bay Area communities do you most associate with diversity?
Choose two.



Other: Fremont, San Francisco, Vallejo, Marin County

CAP Study

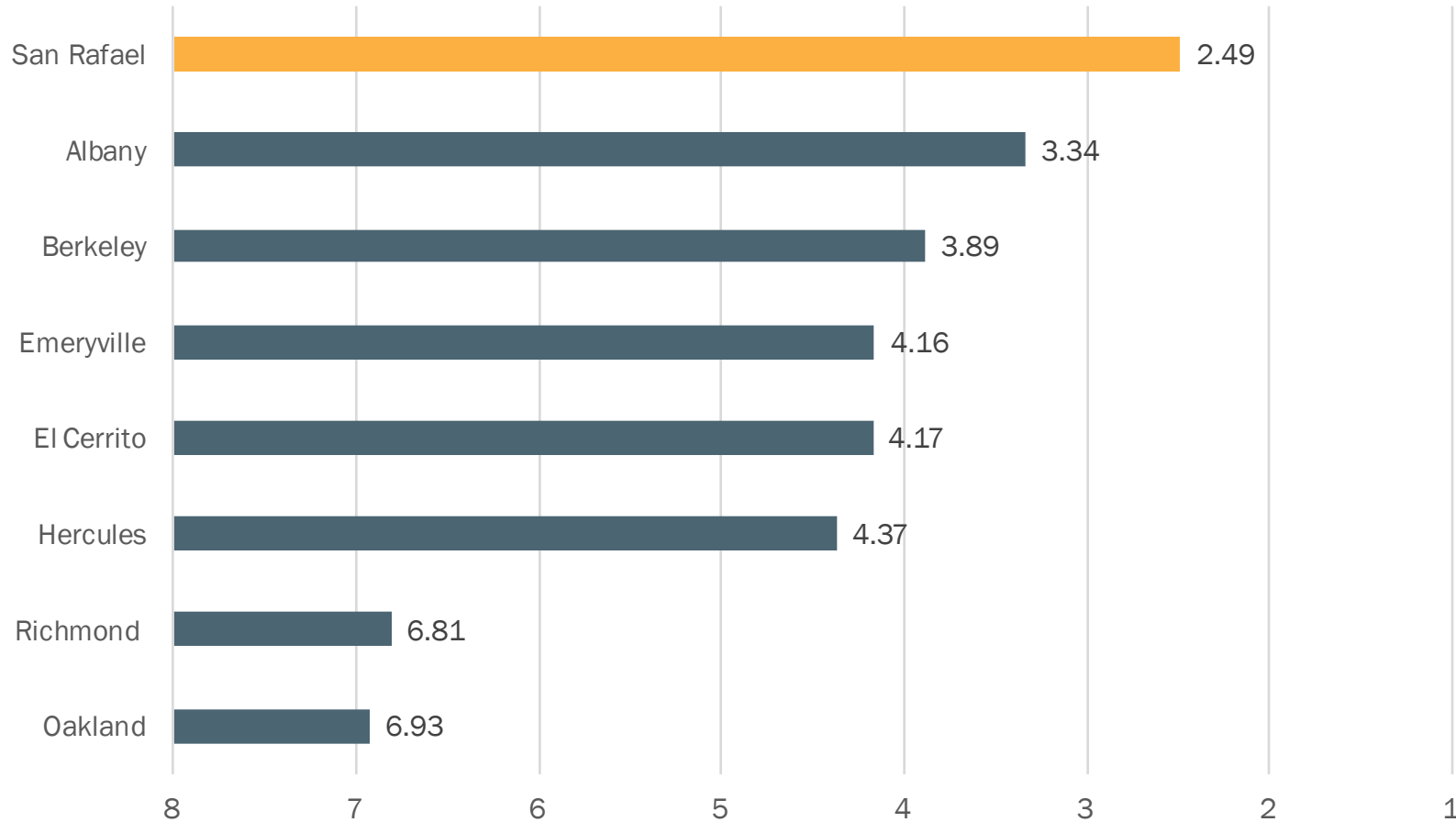
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Choose two.



Other: Fremont, San Francisco, Vallejo, Marin County

CAP Study

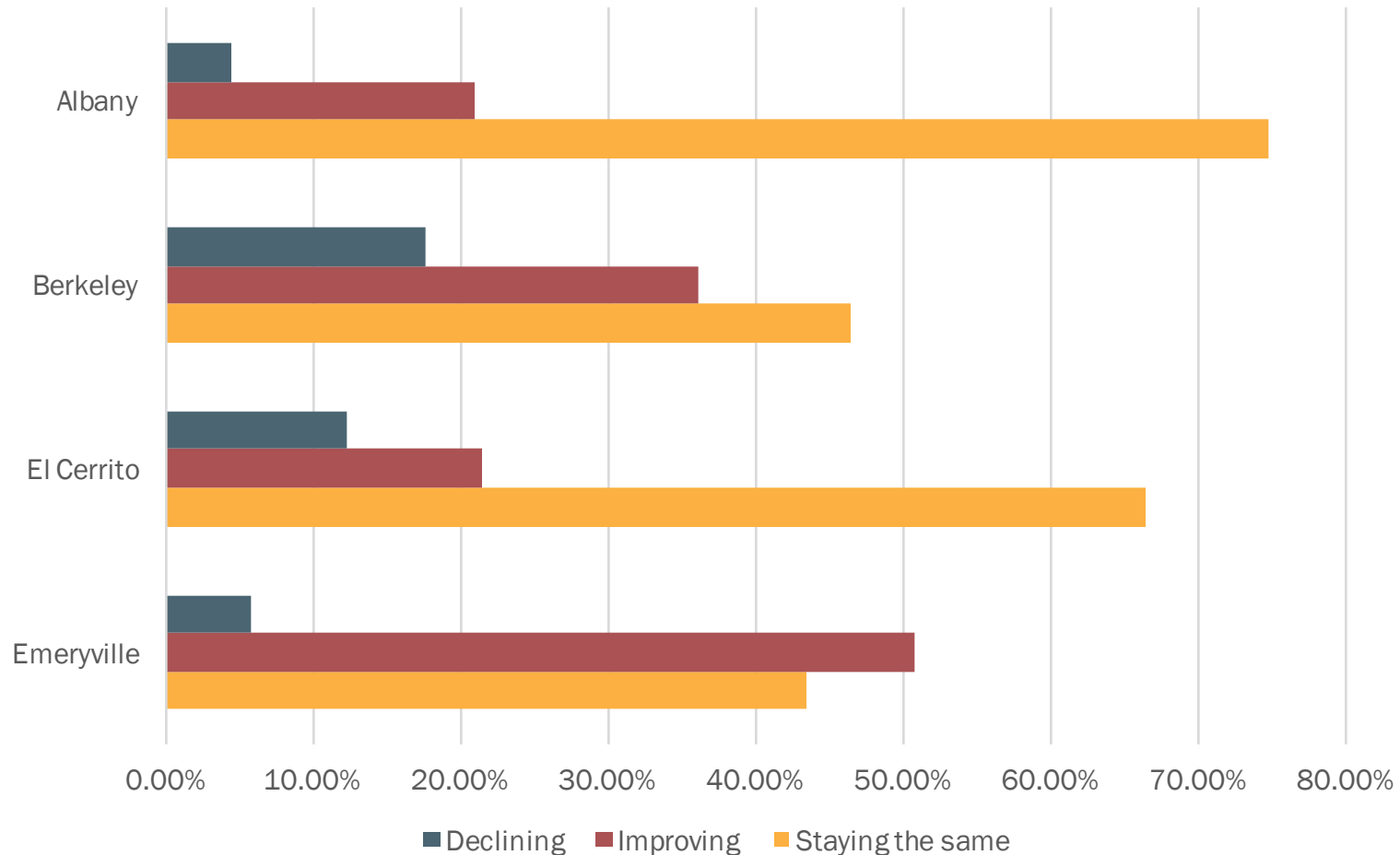
Please rank the following communities from safest to least safe, where 1 is safest and 8 is the least safe.



*Values shown are the mean of all responses

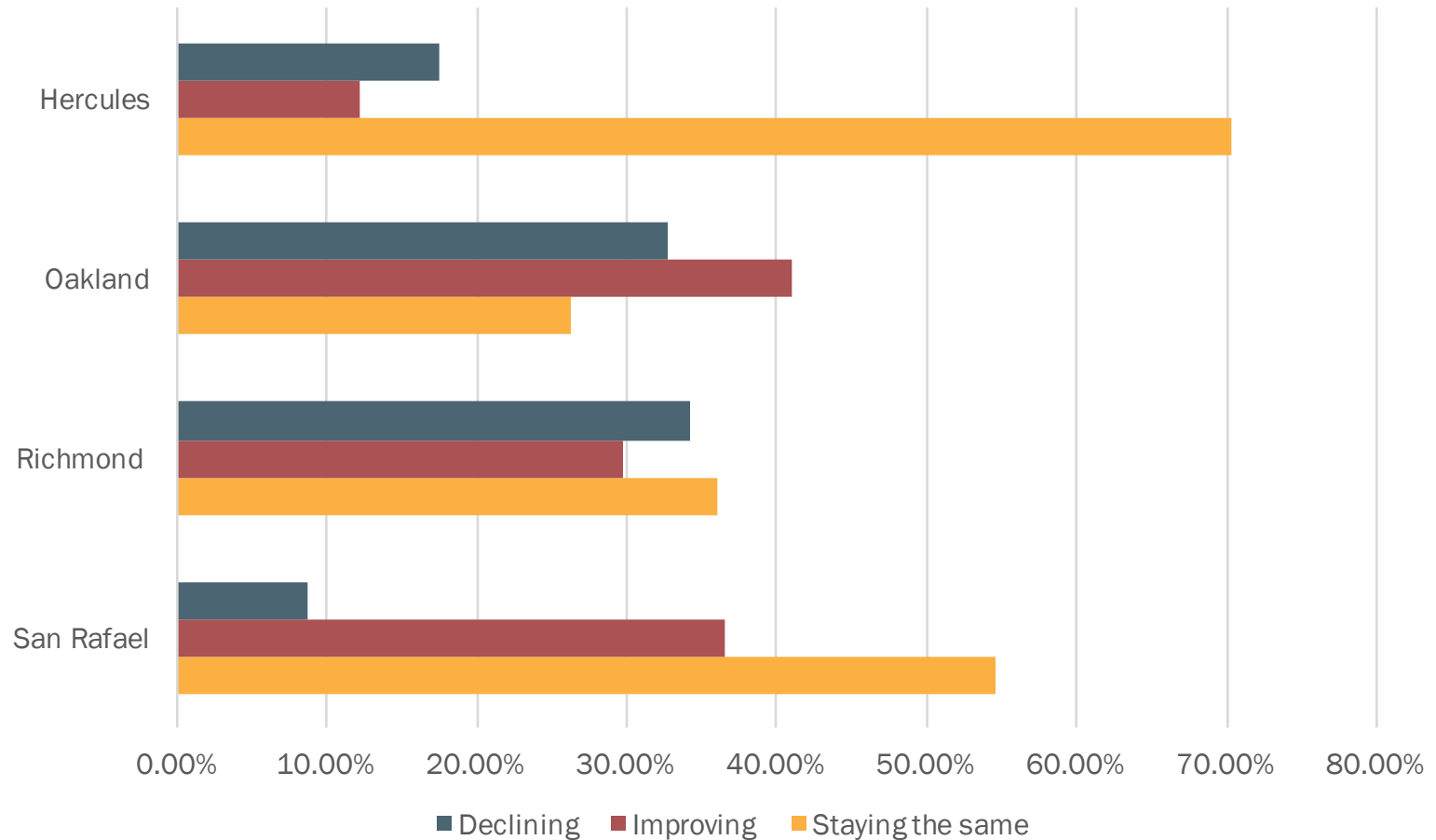
CAP Study

From your perspective do you think the following communities are improving, declining or staying the same?



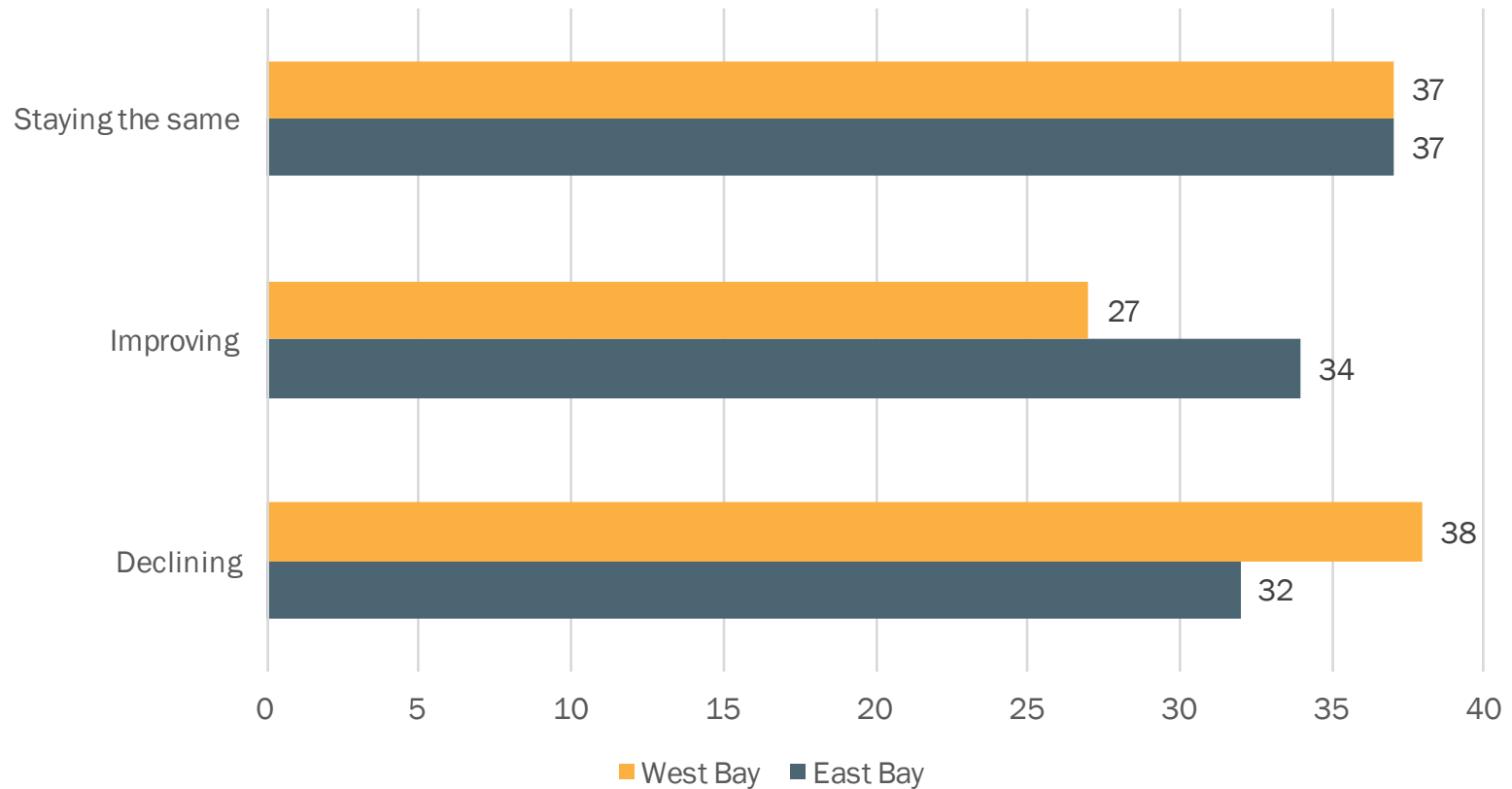
CAP Study

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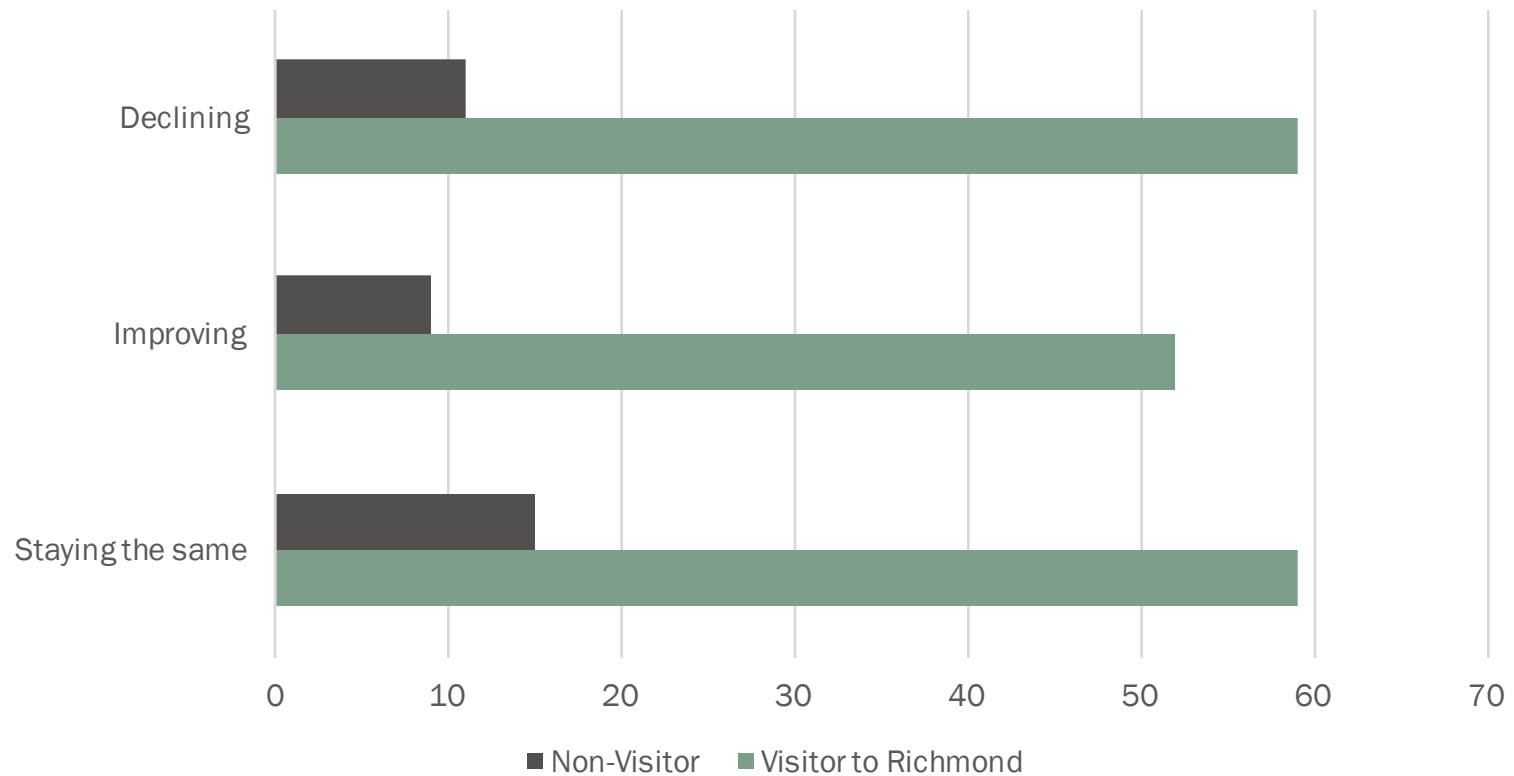
CAP Study

From your perspective do you think Richmond is improving, declining, or staying the same?



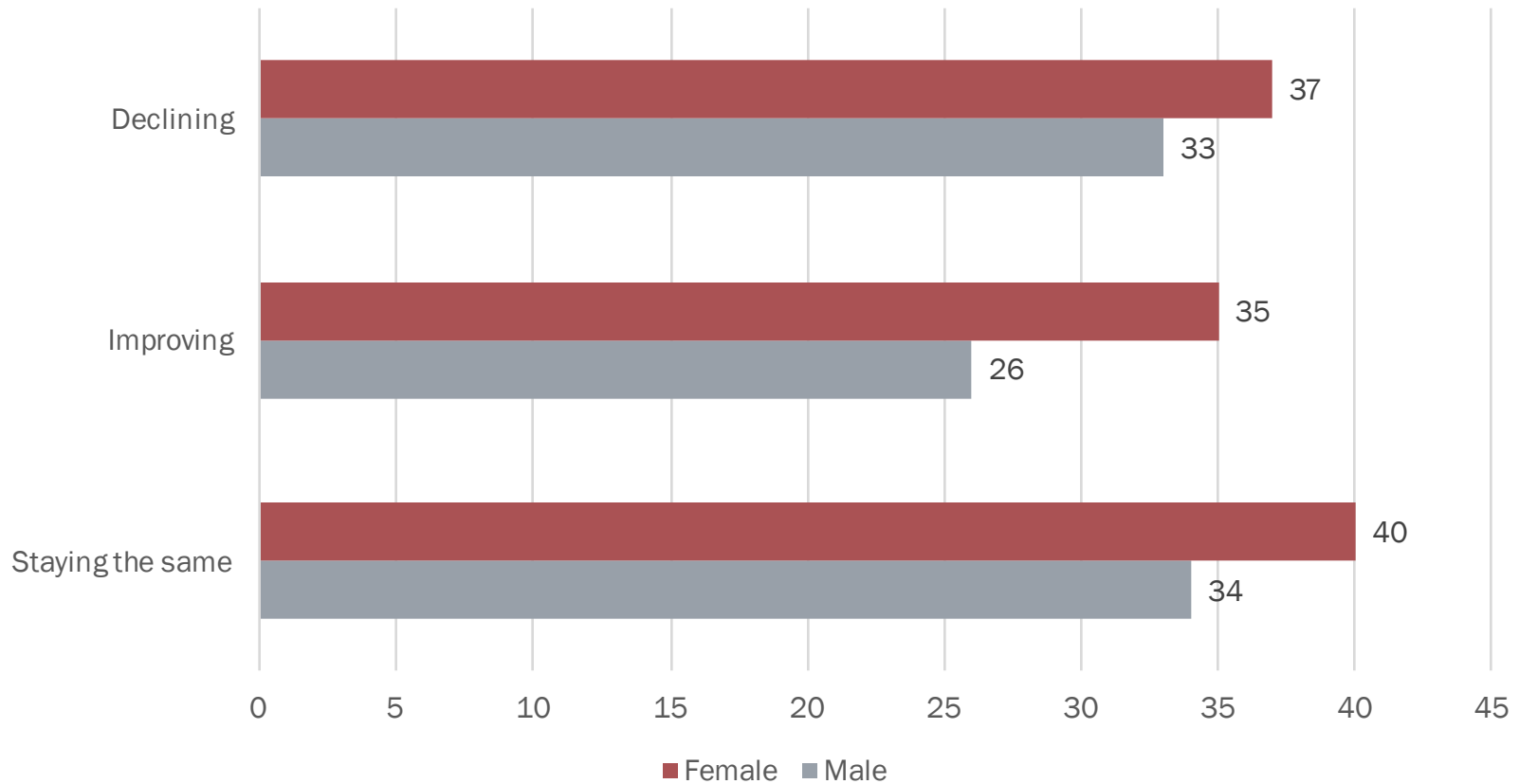
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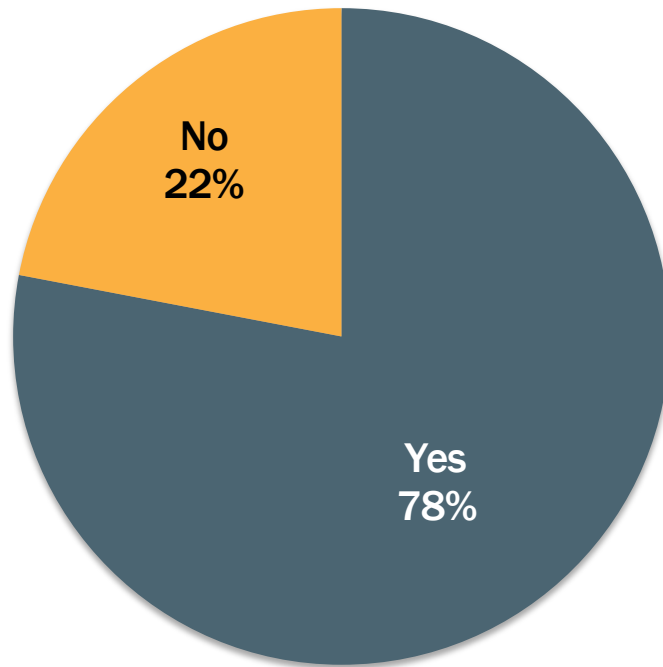
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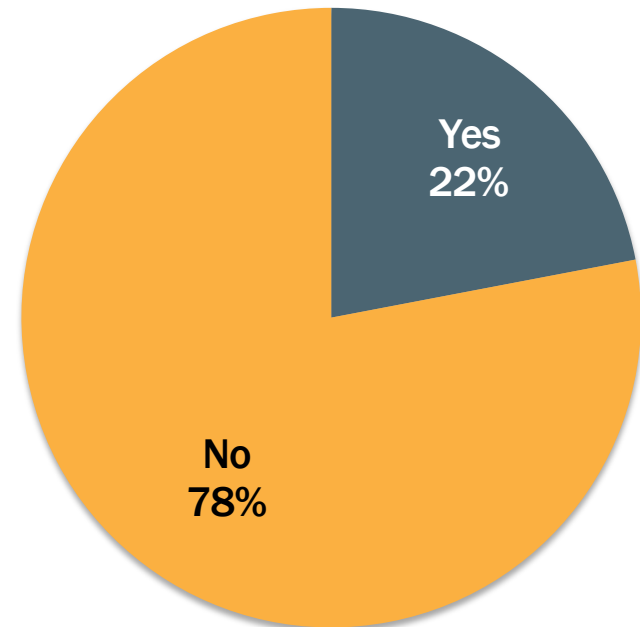


CAP Study

Does WWII history interest you?

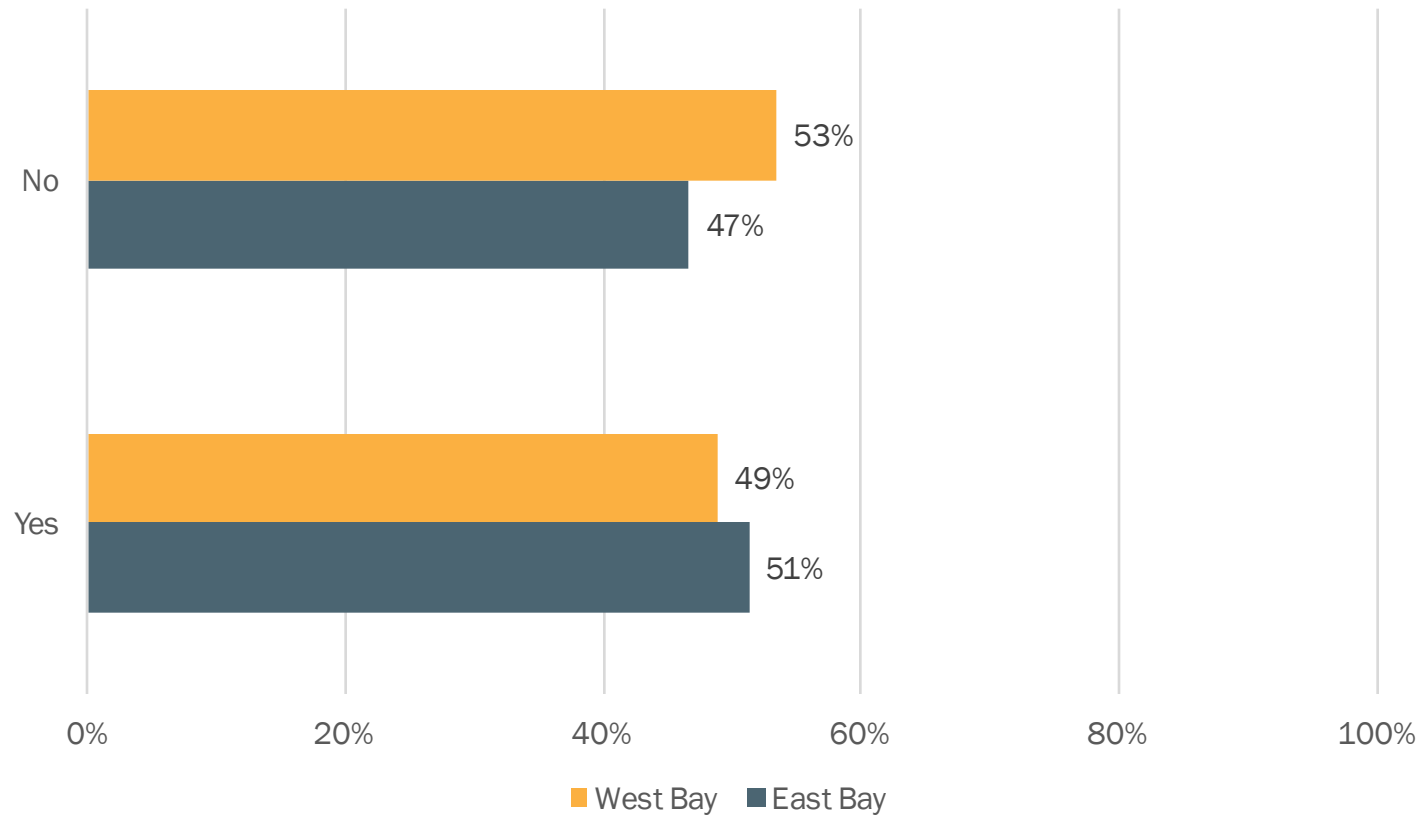


Have you ever visited the Rosie the Riveter Museum and National Park?



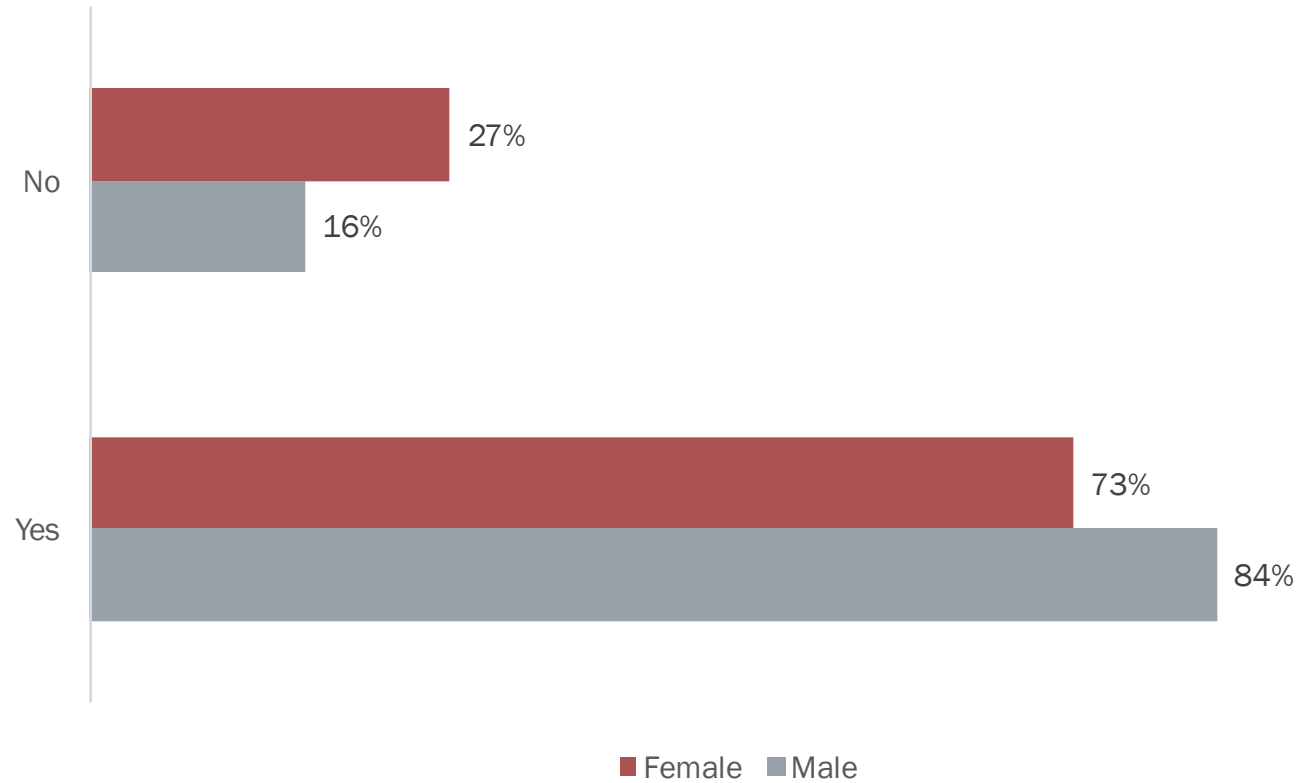
CAP Study

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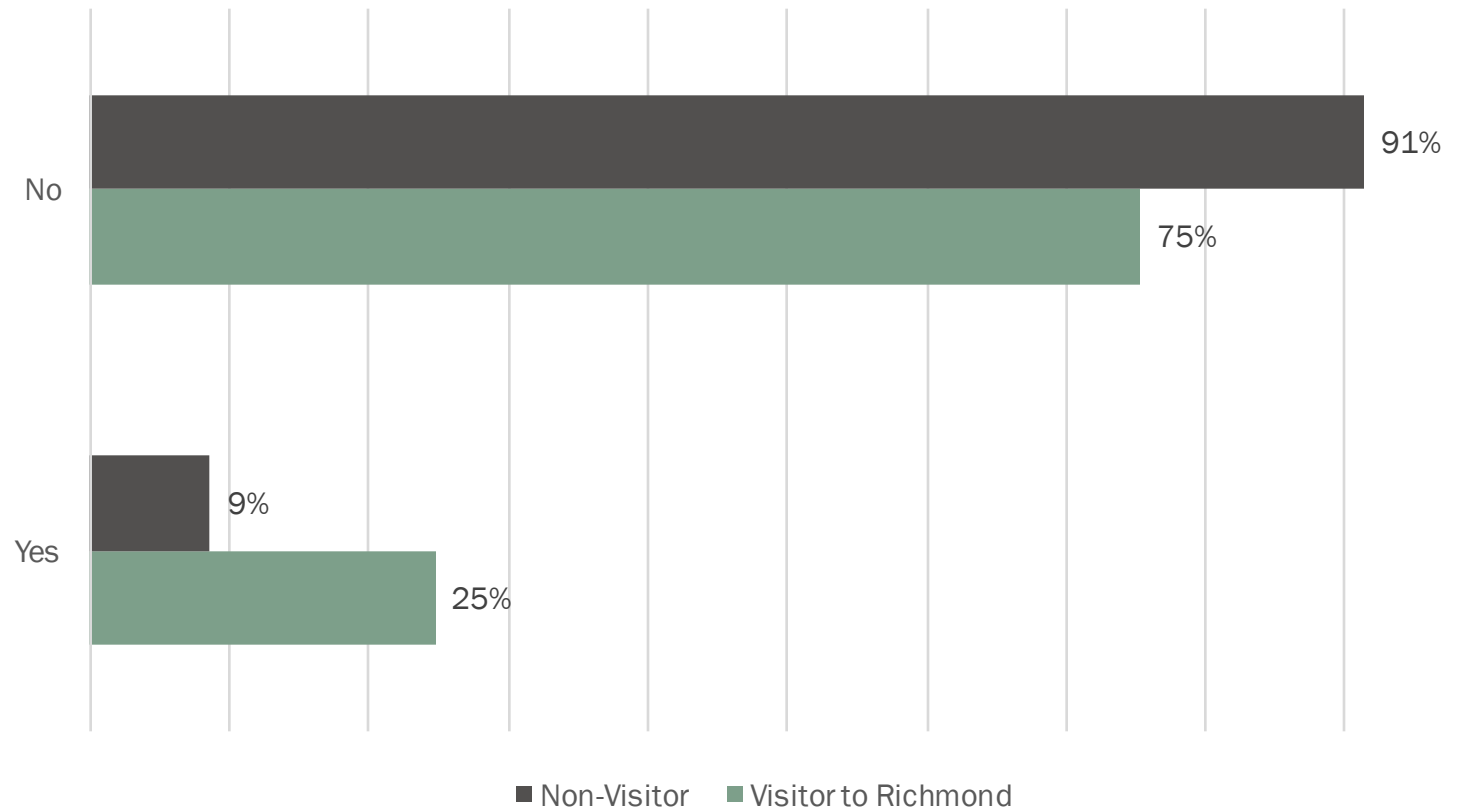
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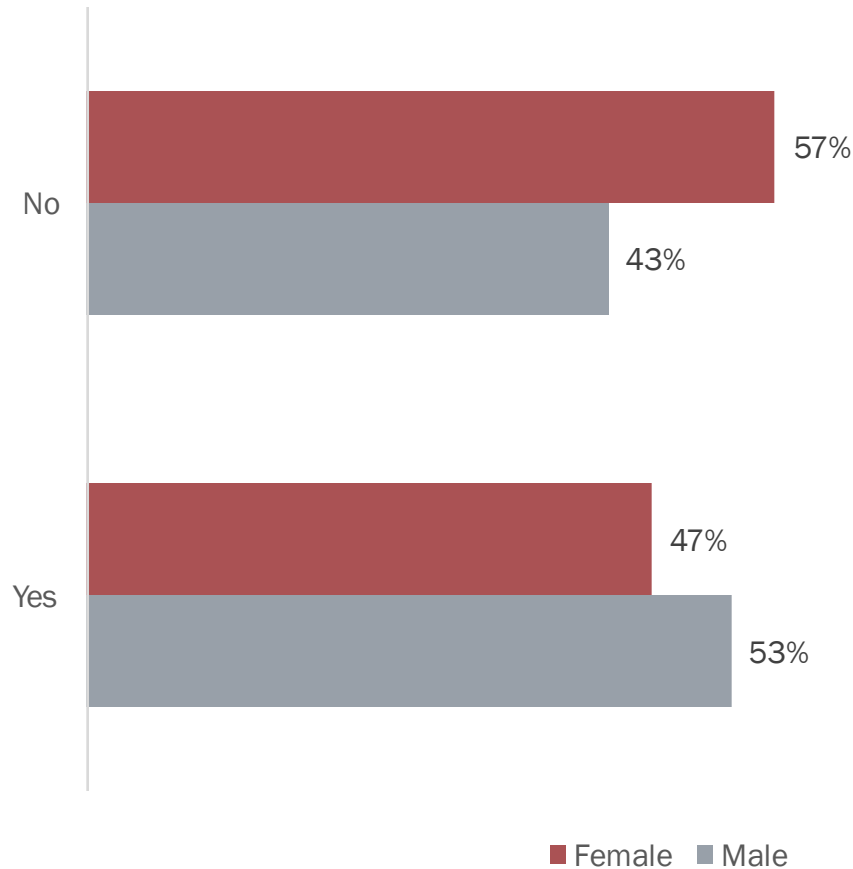
CAP Study

Have you ever visited the Rosie the Riveter Museum and National Park?



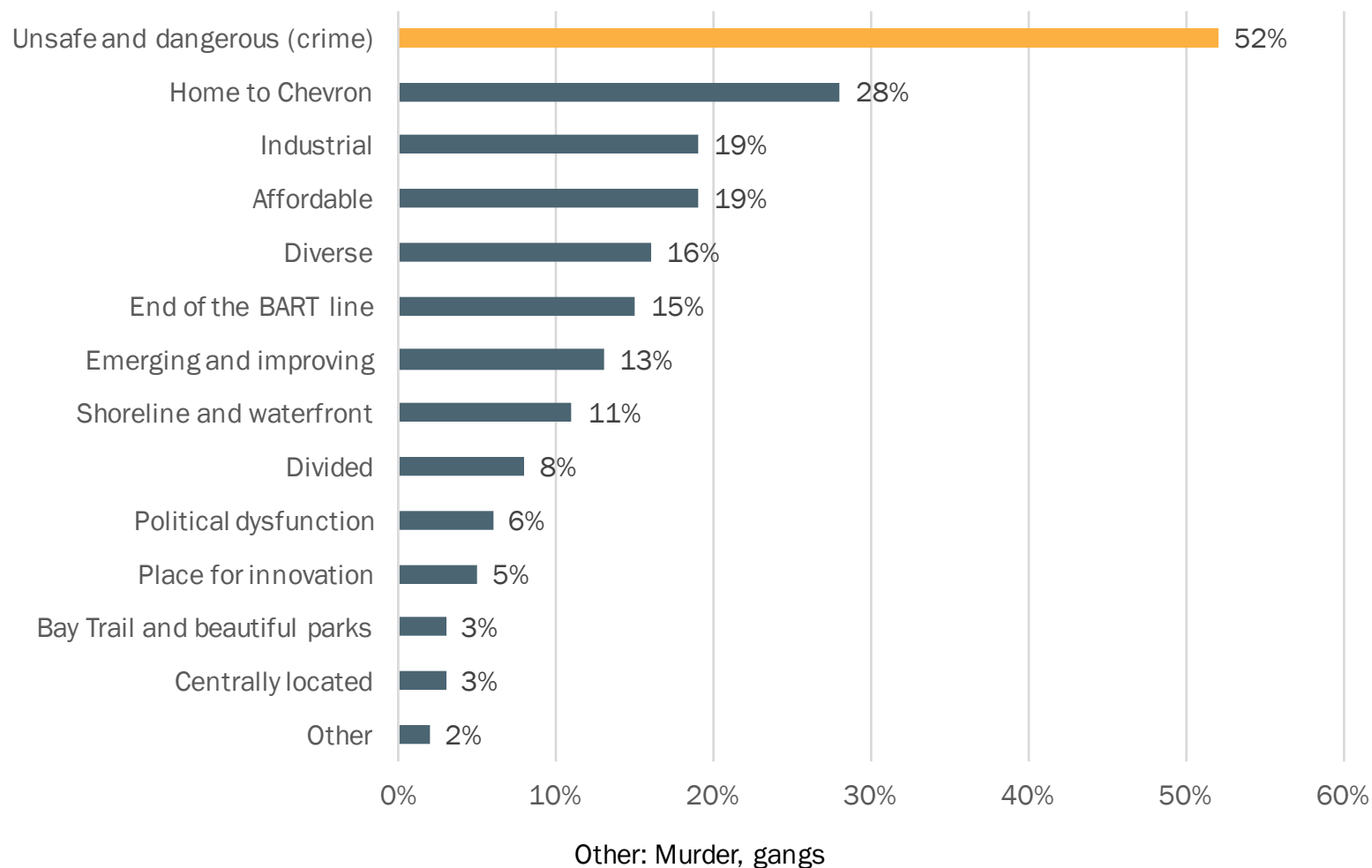
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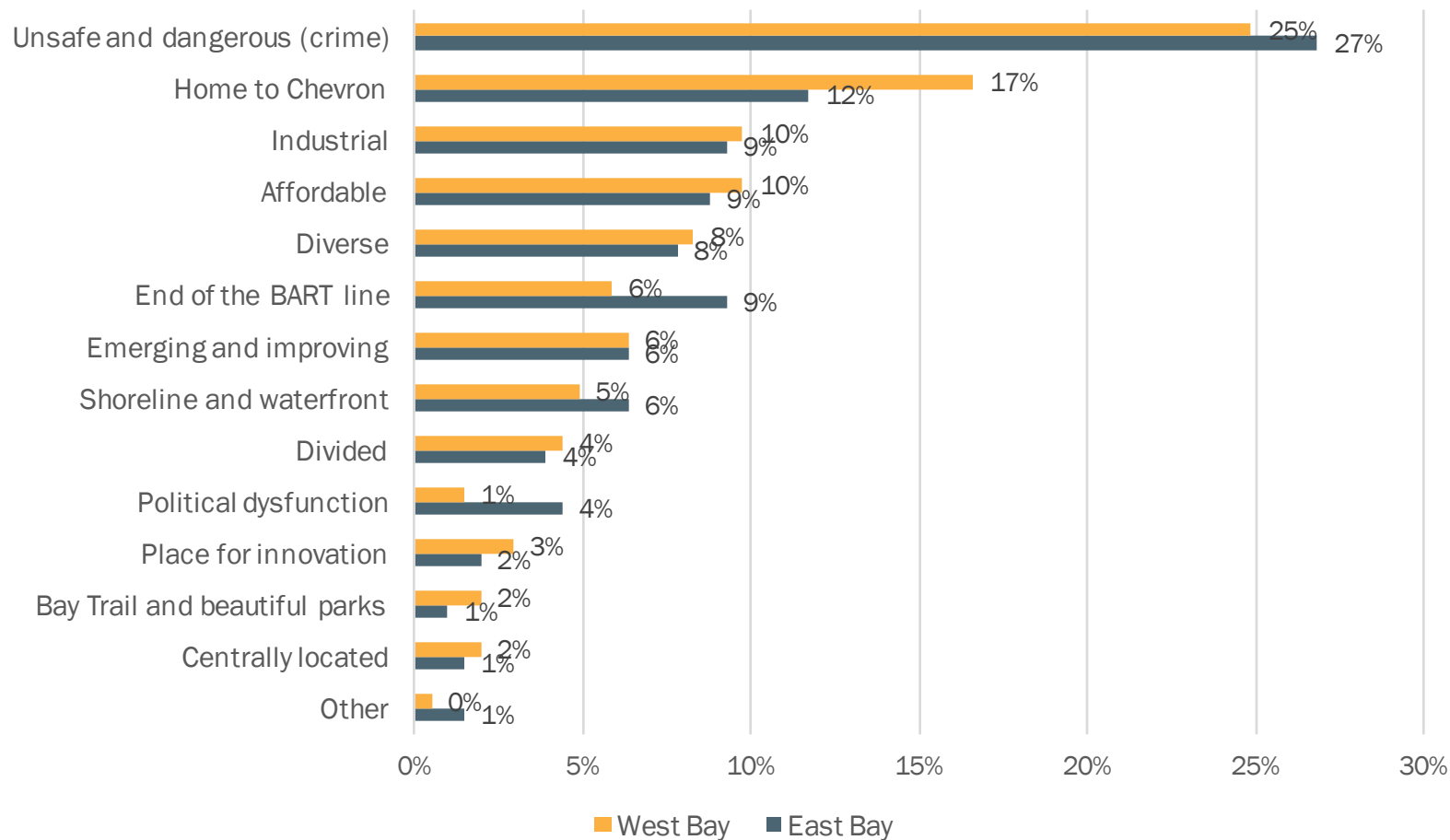
CAP Study

Which of the following most closely fits your perception of Richmond? Choose two answers.



CAP Study

Which of the following most closely fits your perception of Richmond? Choose two answers.

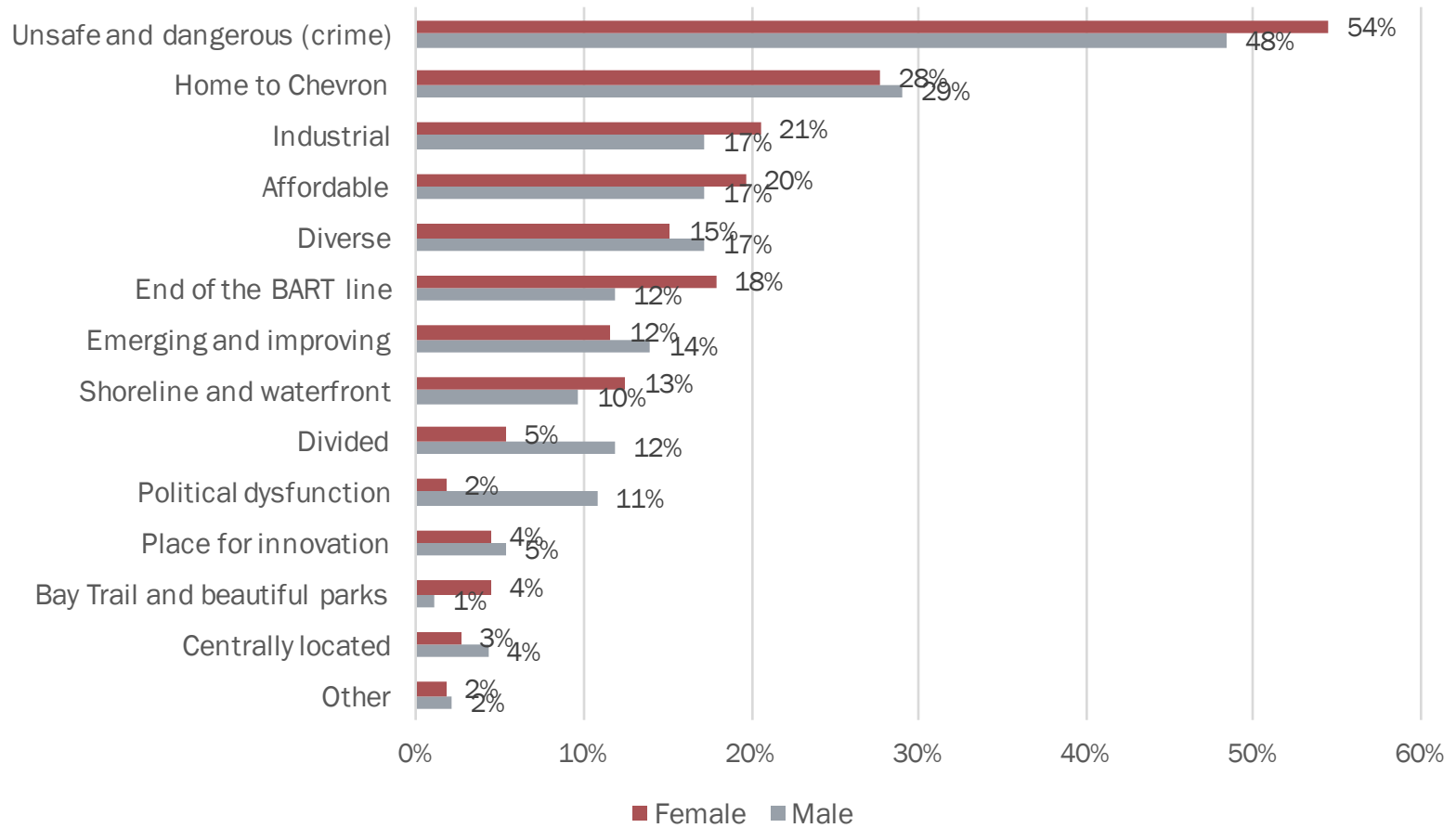


Other: Murder, gangs



CAP Study

Which of the following most closely fits your perception of Richmond? Choose two answers.



CAP Study

What is the difference between Richmond and Point Richmond?

- **“Point Richmond is smaller with more scenic views, while Richmond is more industrial”**
- **“Income and racial demographics”**
- **“Point Richmond has new development, is more isolated and has waterfront housing with nice views, but Richmond has been declining for years”**
- **“Point Richmond is a neighborhood within the city of Richmond”**
- **“Point Richmond is safer and more upscale because it is more remote and close to the bridge to San Rafael”**
- **“Point Richmond is a small, historic district with less crime”**

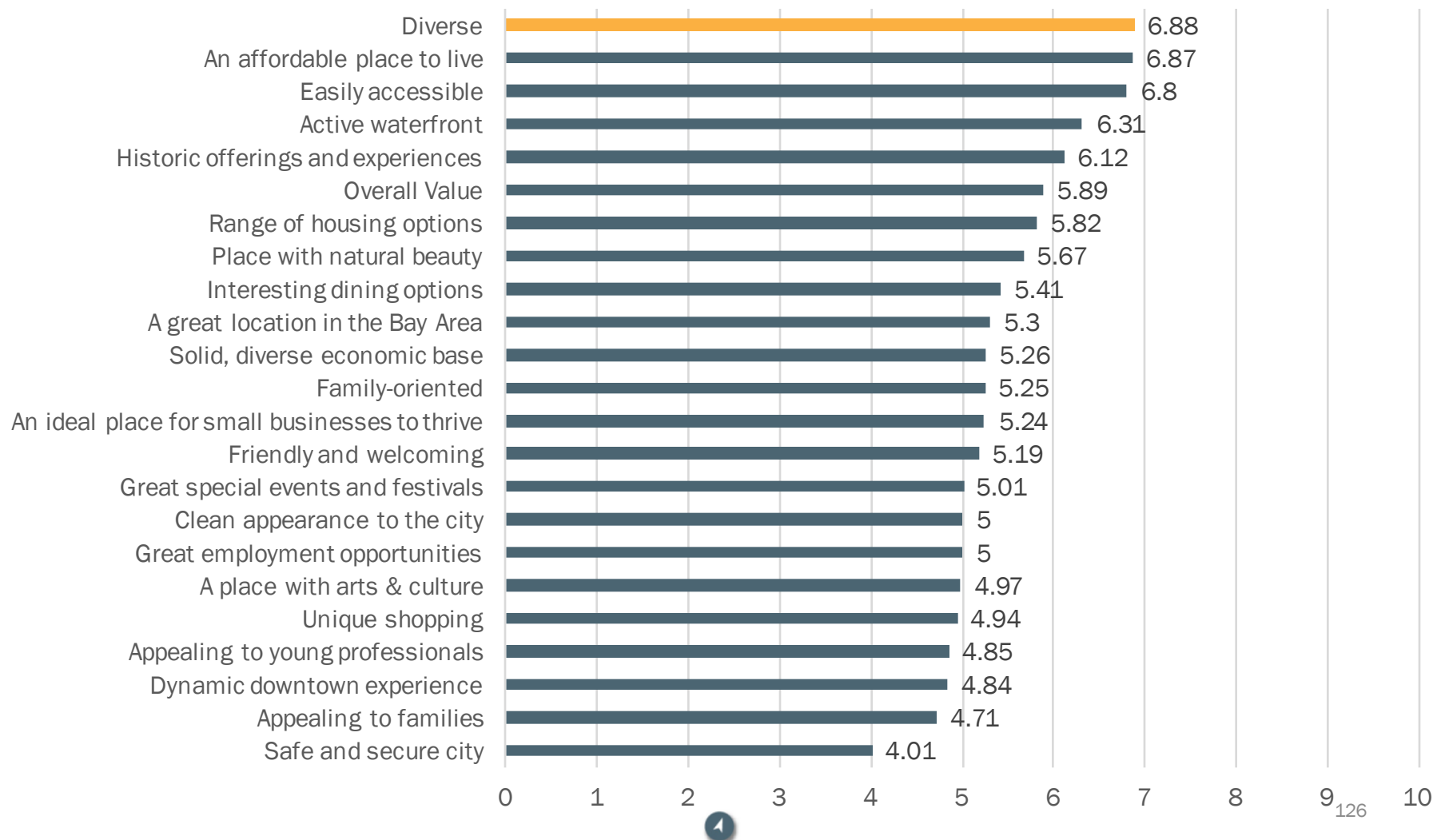
CAP Study

What do you know about the Craneway Building in Richmond?

- “It’s a former Ford assembly plant”
- “It is a great venue for events, but is struggling because of its location”
- “A revitalized Ford plant used as a civic platform for a variety of events”
- “A pavilion on the bay”
- “It’s an amazing all glass space with beautiful interior light”
- “Shops and restaurants near the Rosie the Riveter Museum”

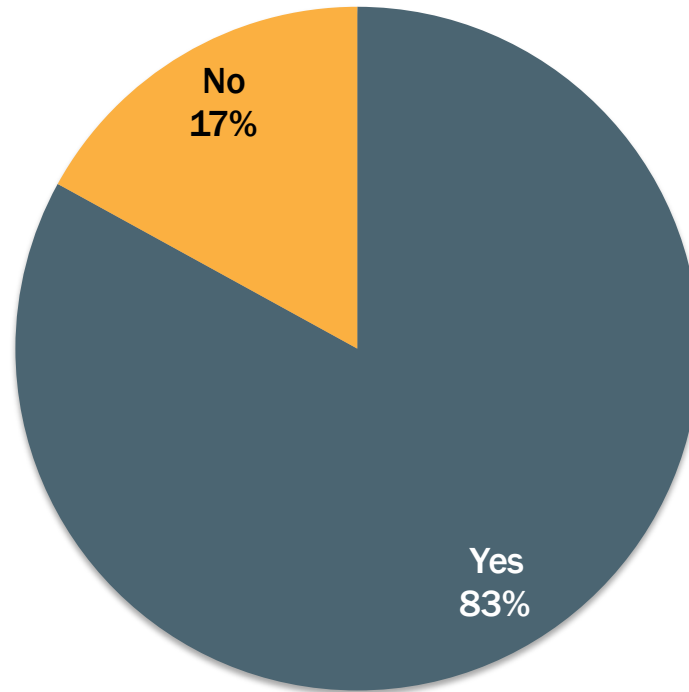
CAP Study

Based on your experiences visiting Richmond, how would you rate the following attributes regarding Richmond using a scale of 1 to 10 with one indicating “poor” and 10 indicating “excellent”?



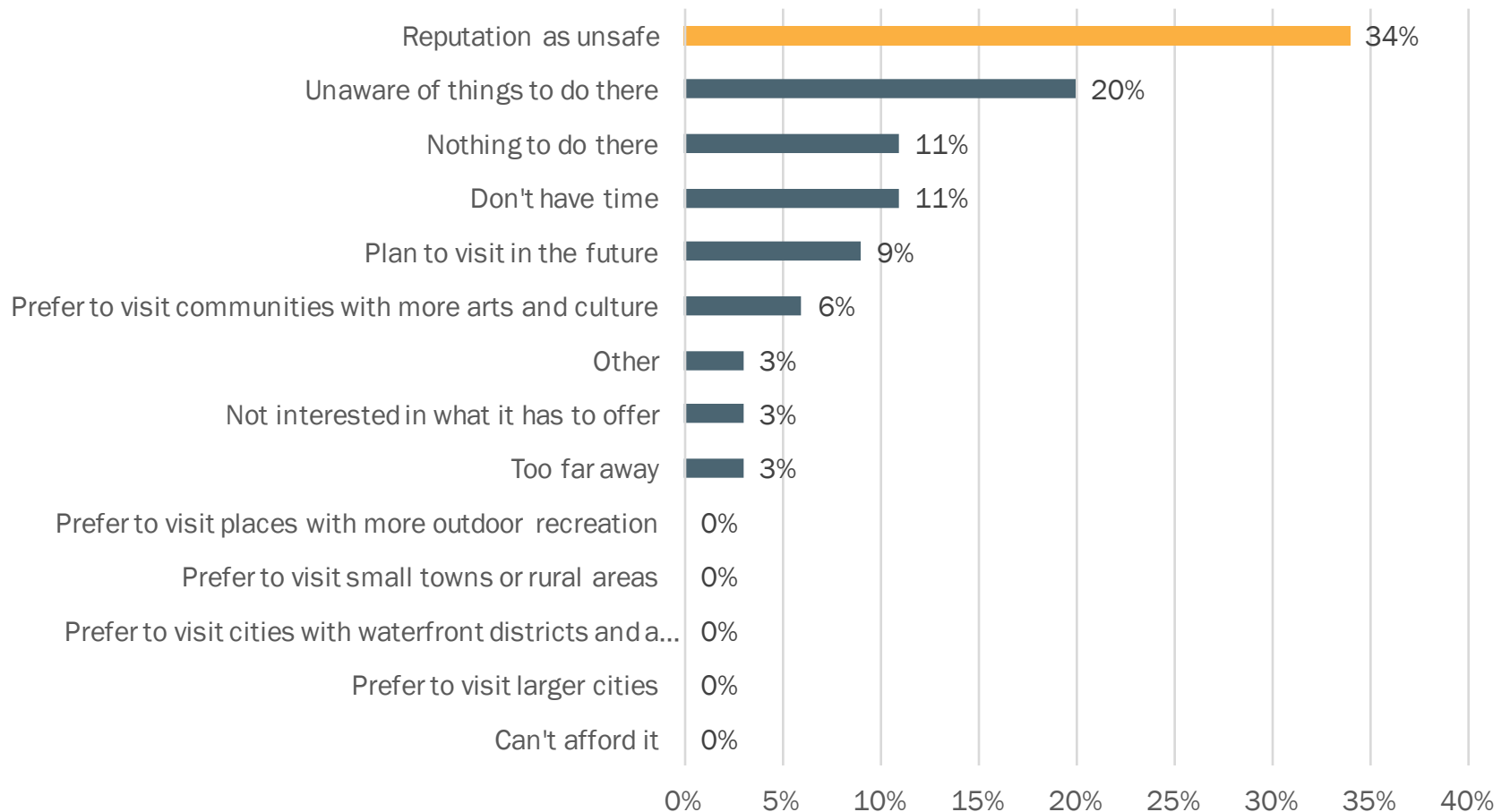
CAP Study

Have you visited or been to Richmond?



CAP Study

Why have you NOT visited Richmond? Choose all that apply.
35 responses.

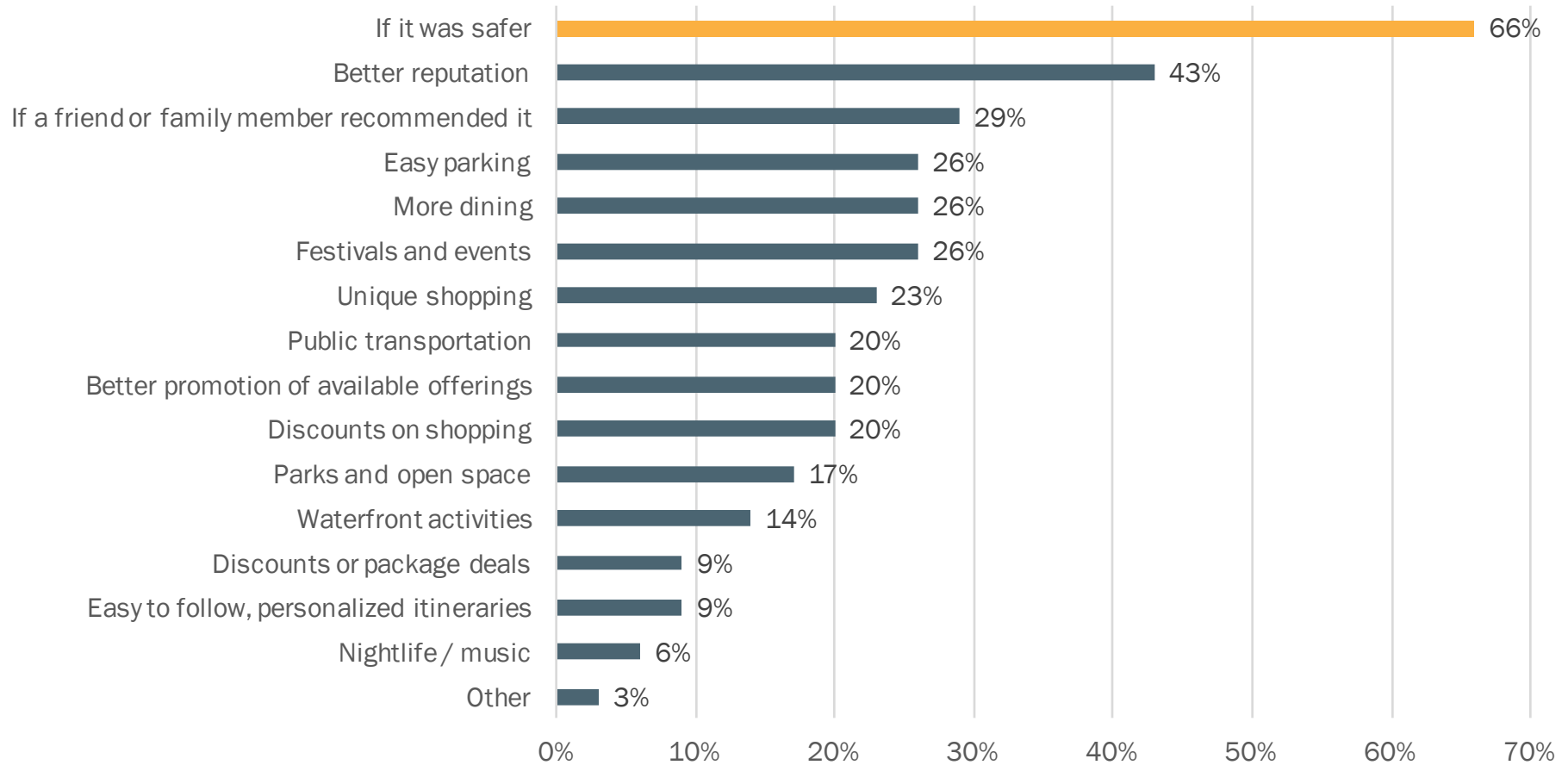


Other: Don't know



CAP Study

What would make you more likely to visit Richmond? Choose all that apply.
35 responses.

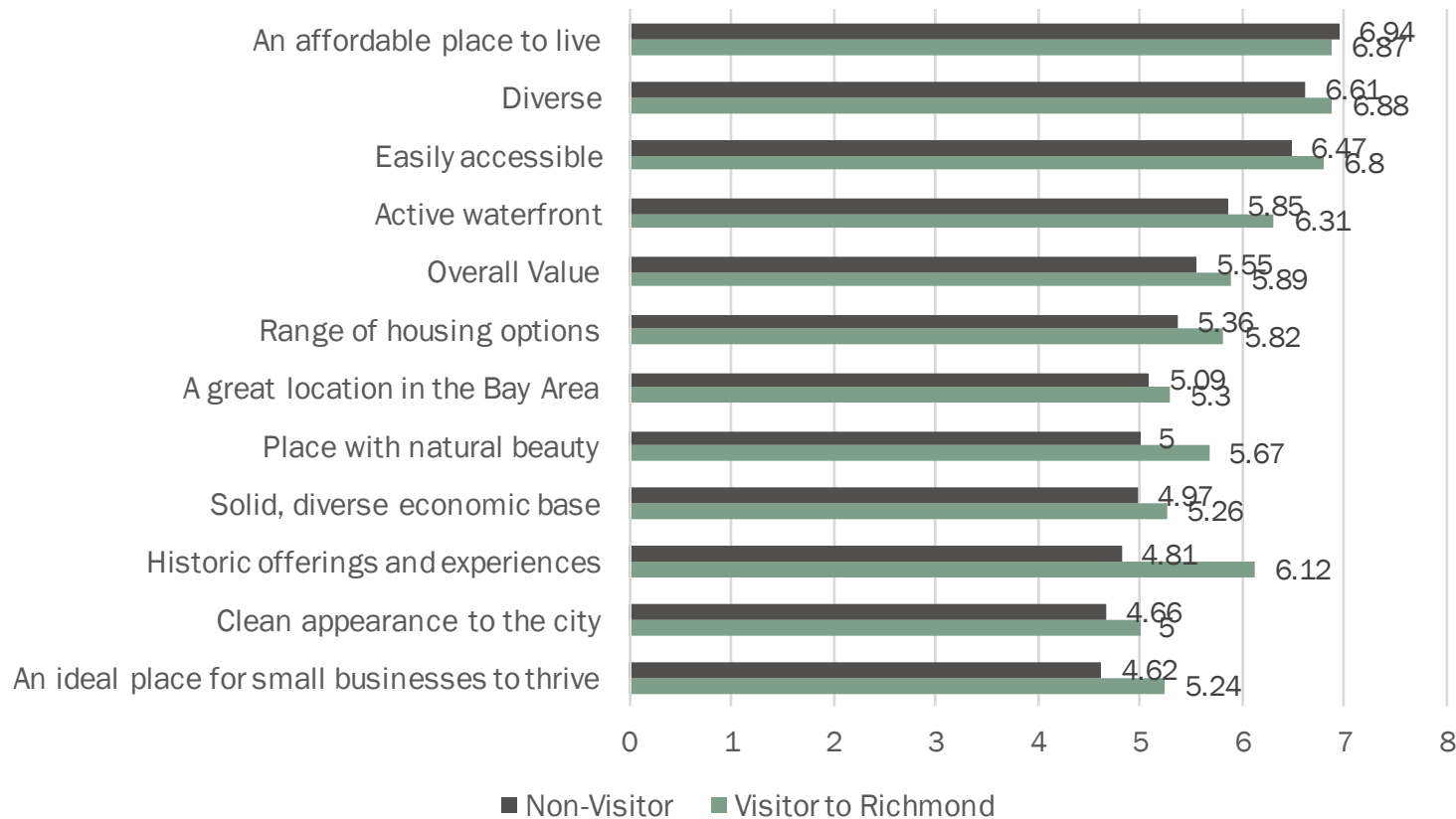


Other: Protection



CAP Study

Based only on your perception as a non-visitor or your experience as a visitor to Richmond, how would you rate the following descriptions on a scale of 1 to 10, with 1 being “does not describe Richmond at all” and 10 being “is an exact description of Richmond?”



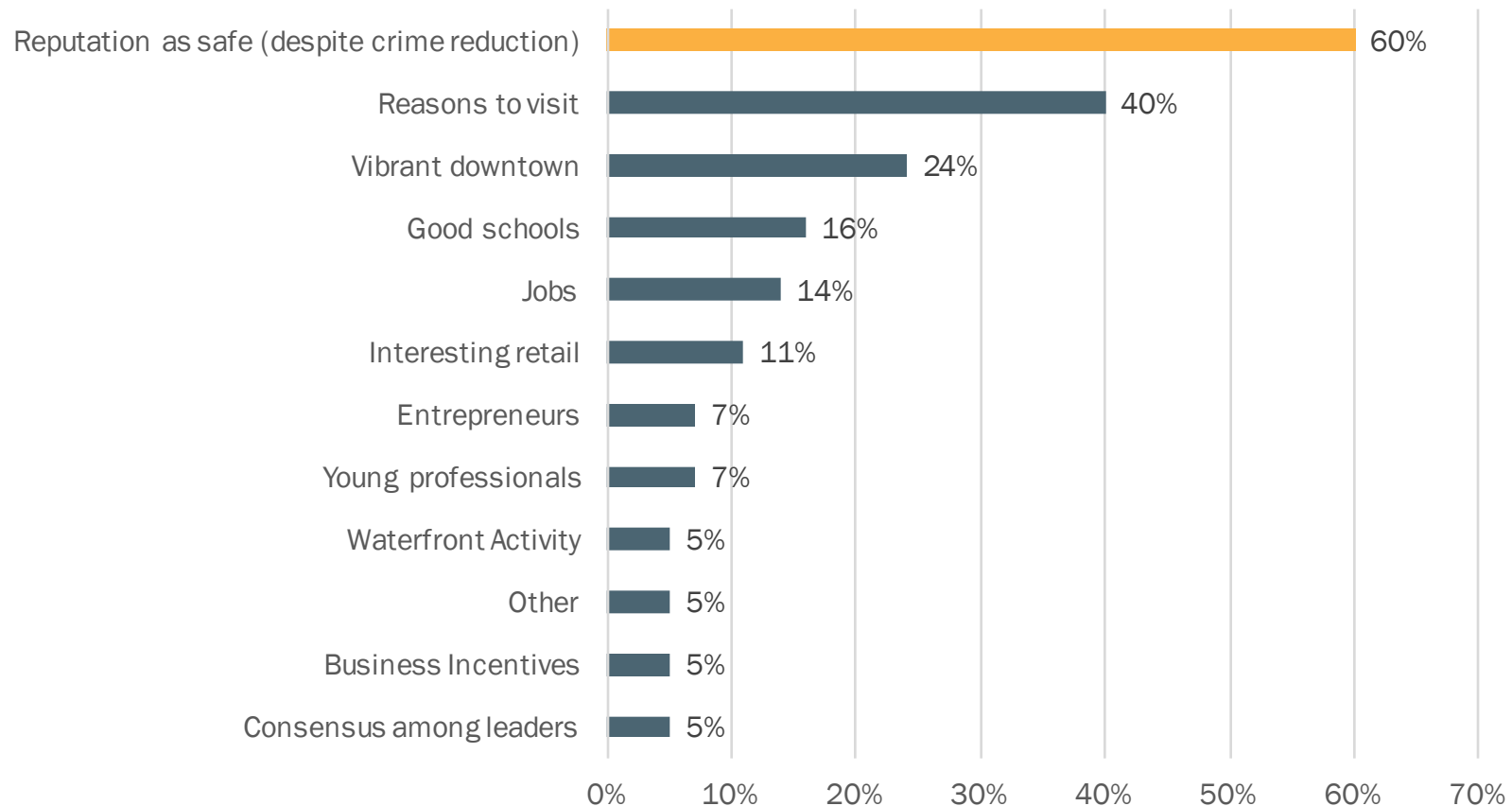
CAP Study

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CAP Study

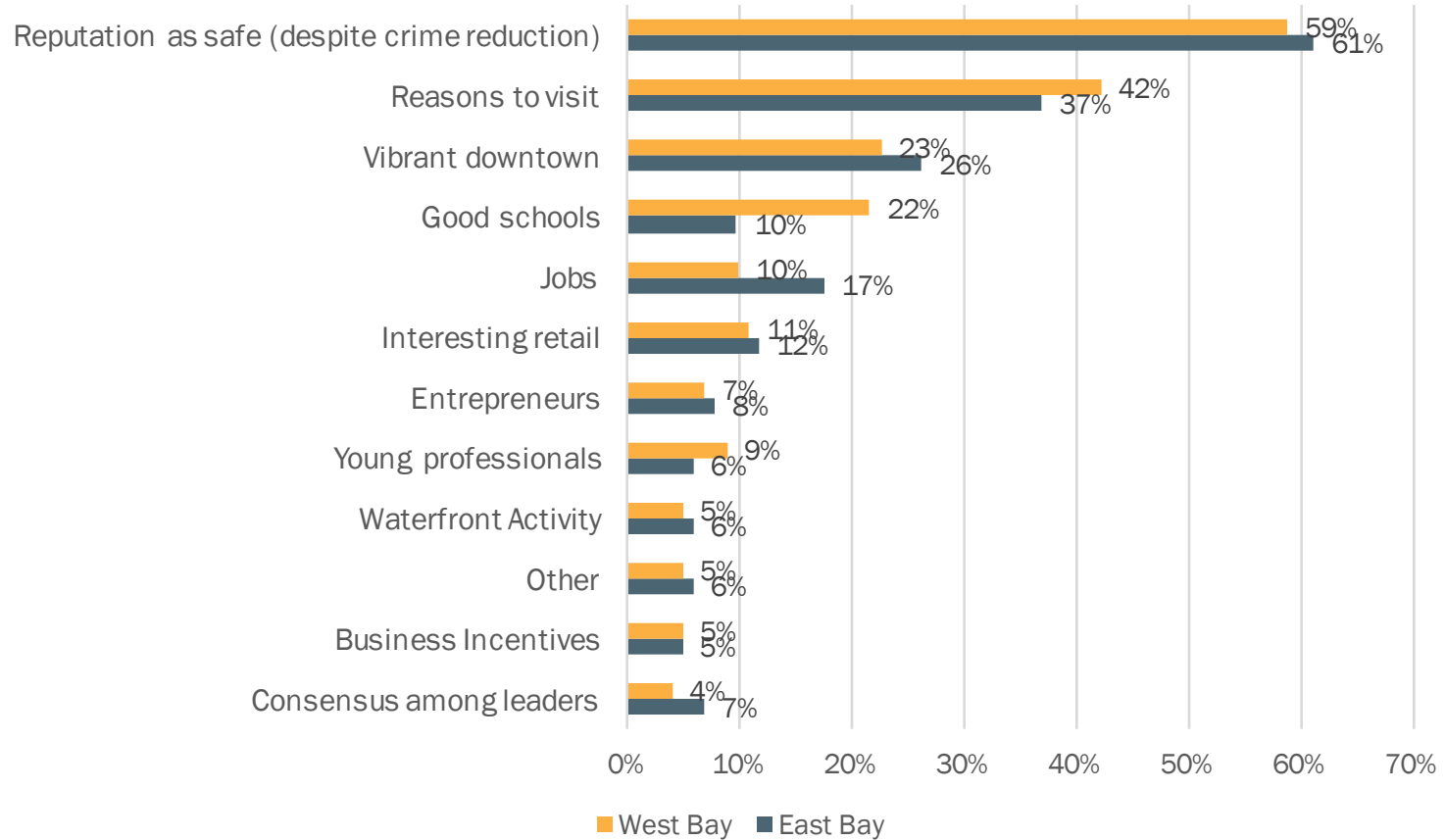
In your opinion, what is missing in Richmond? Choose two answers.



Other: Effective police force, don't know, nothing

CAP Study

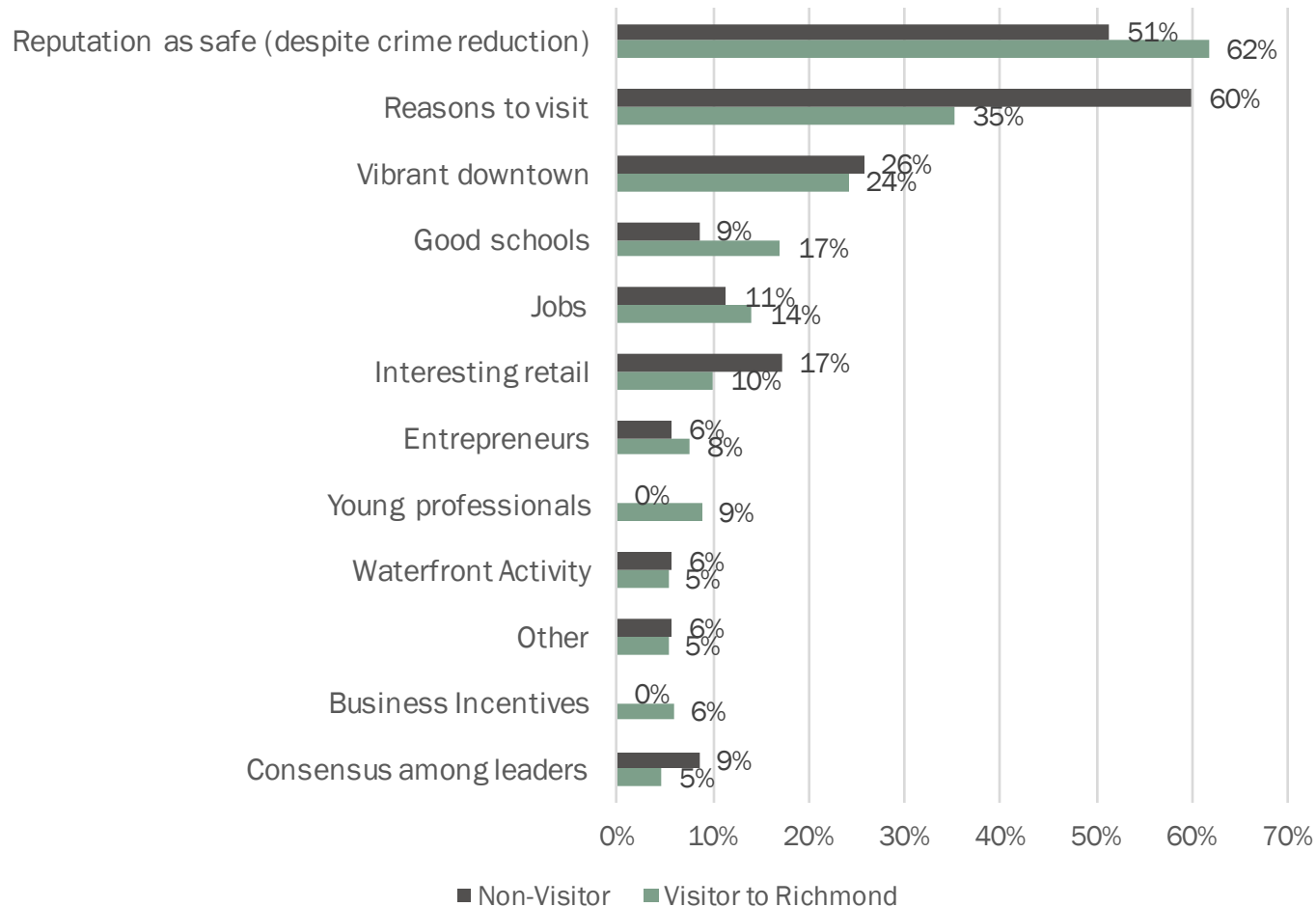
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CAP Study

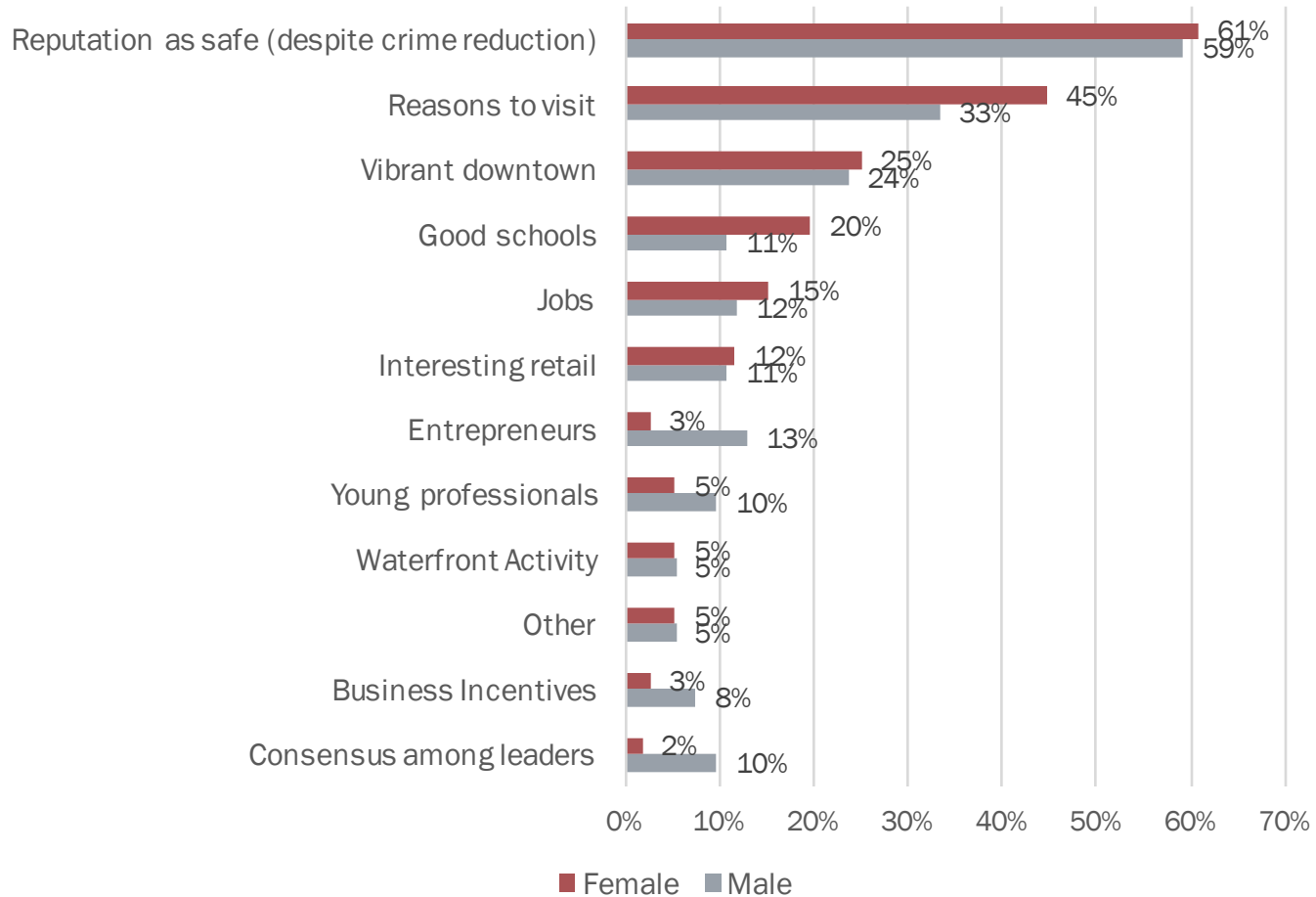
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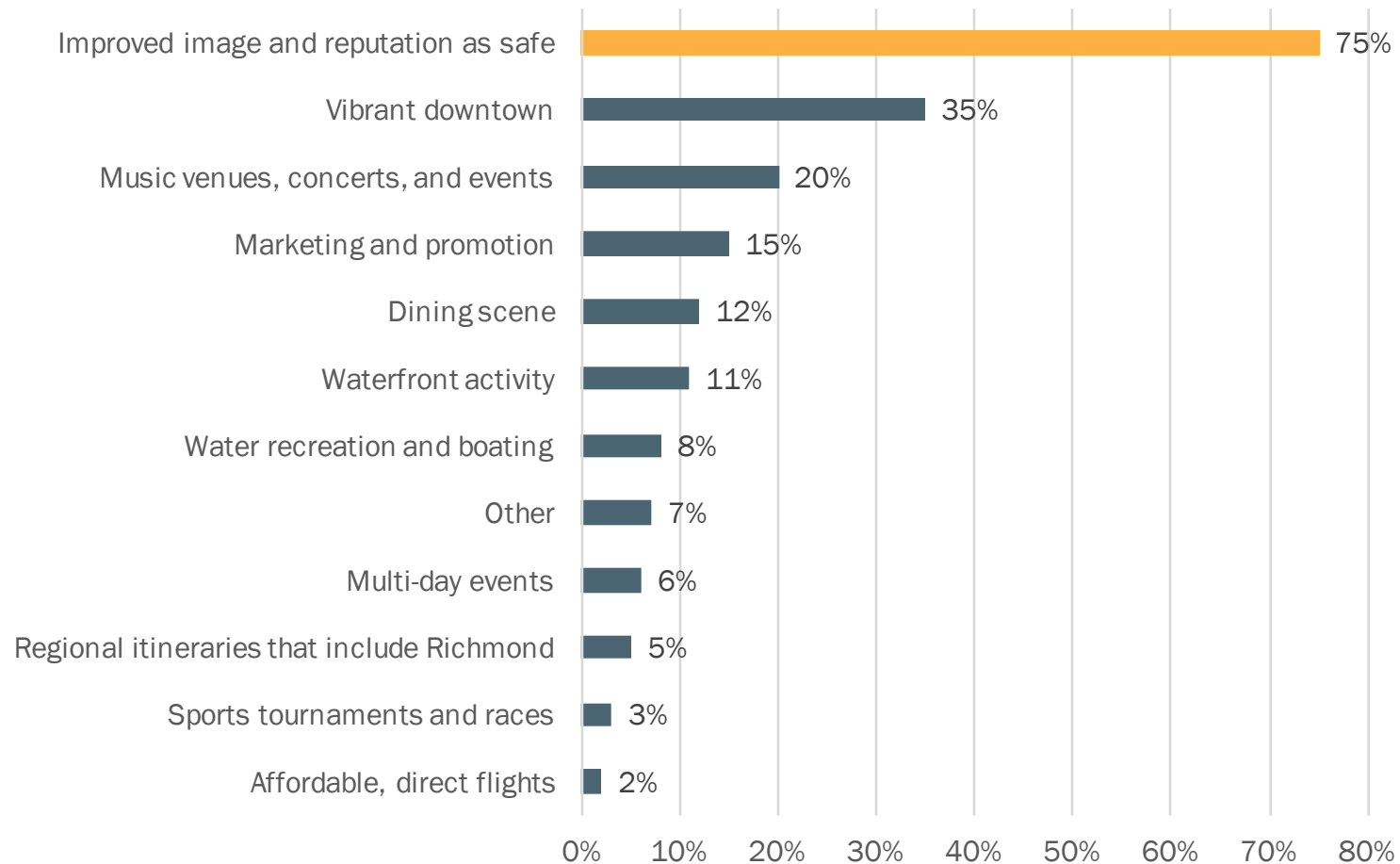
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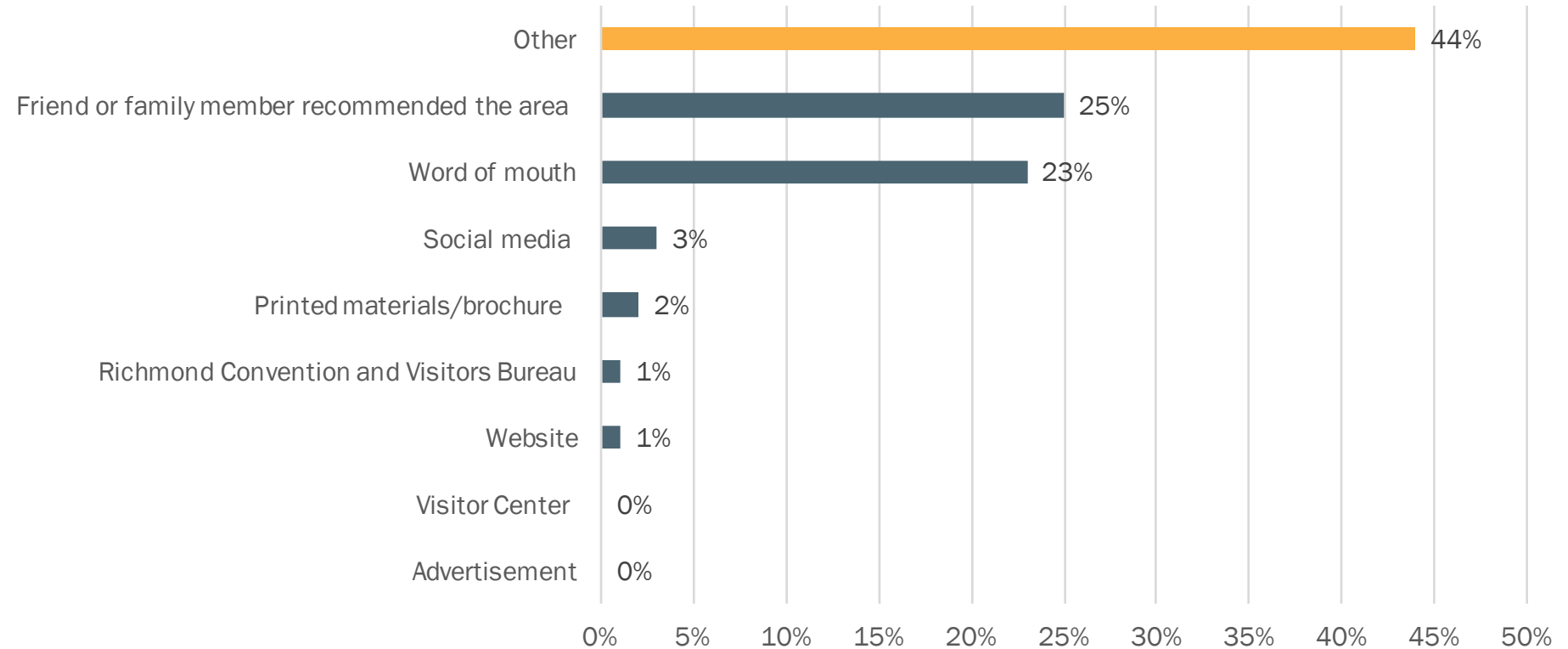
What could attract more visitors to Richmond? Choose two answers.



Other: Clean up city, high police presence, new housing developments, things to do

CAP Study

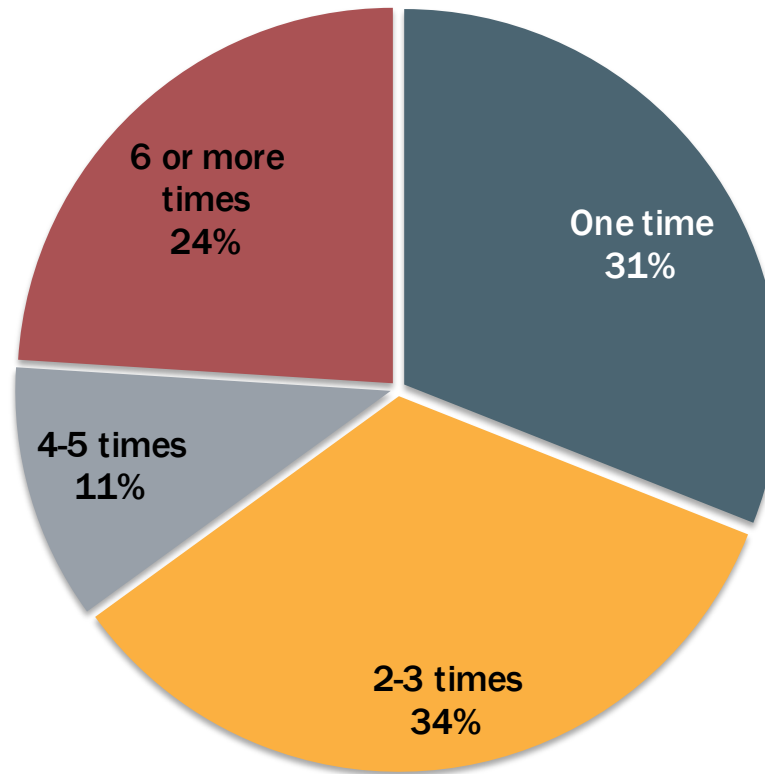
How did you hear about Richmond?



Other: Always known about it, worked there, drive by, family lives there, hear about crime on the news

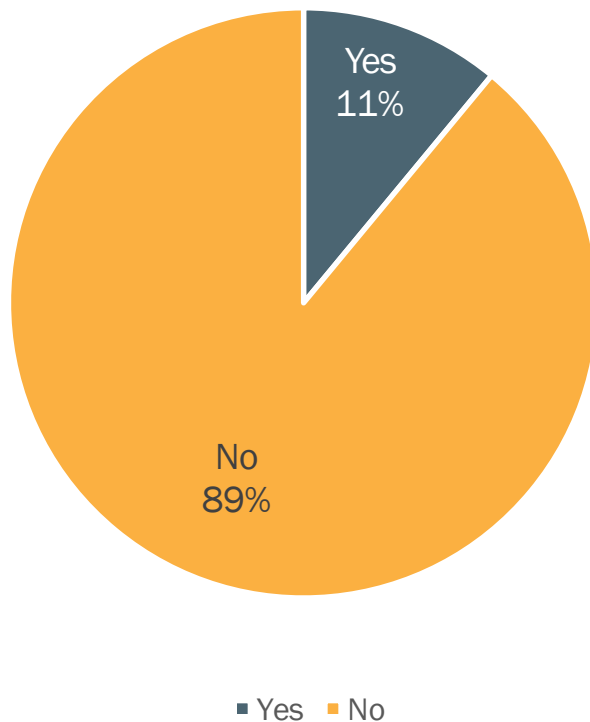
CAP Study

How many times have you visited Richmond in the last three years?

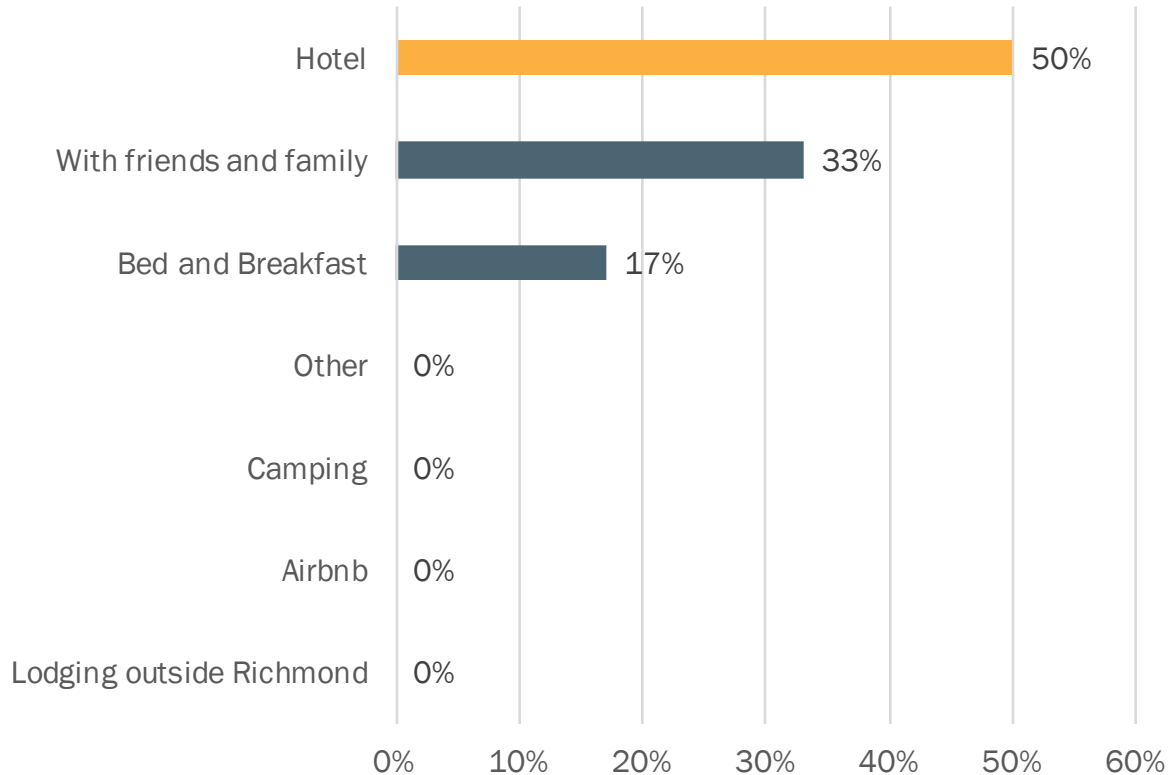


CAP Study

Do you typically stay overnight when visiting Richmond?

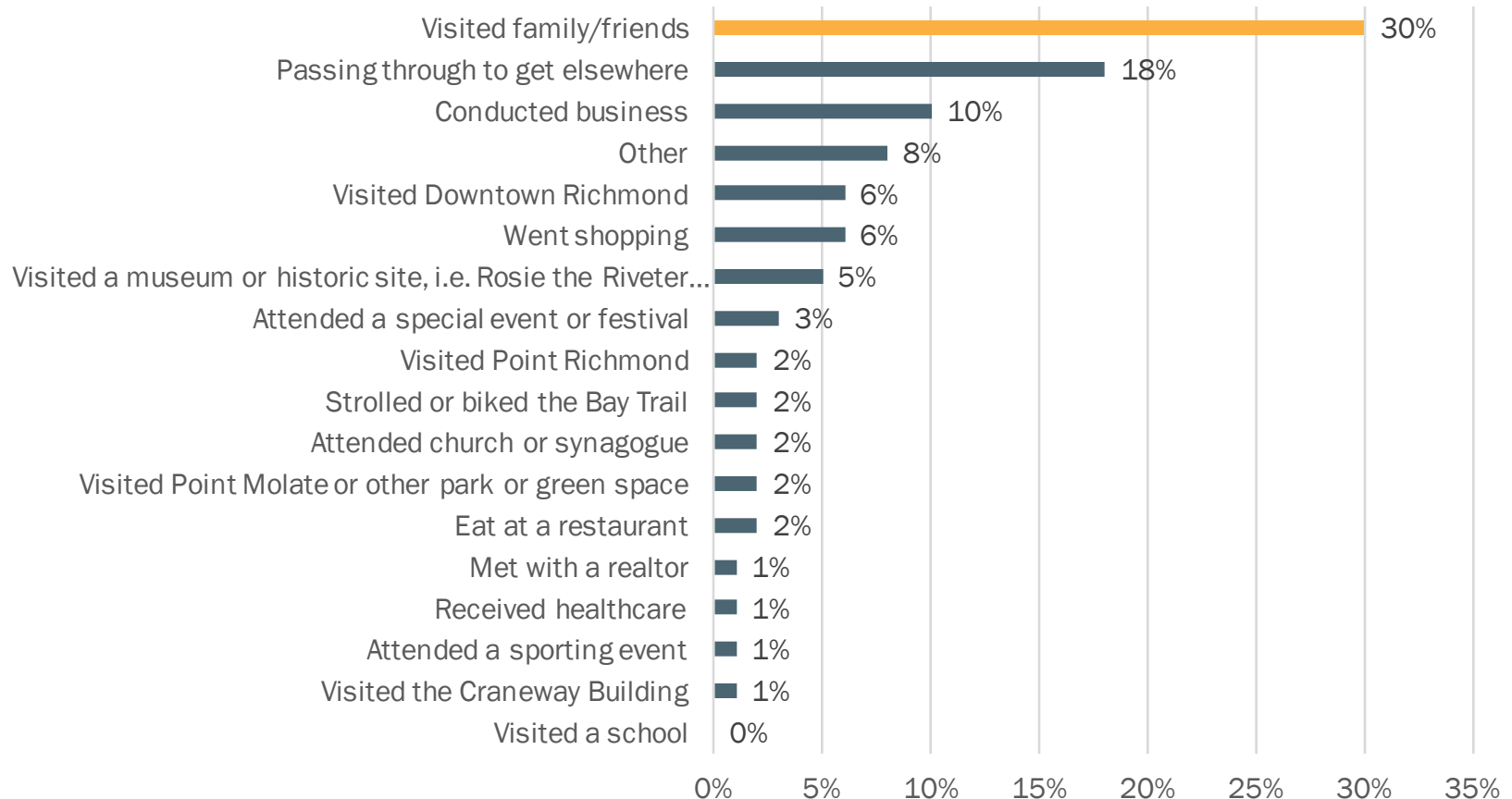


Where do you stay?



CAP Study

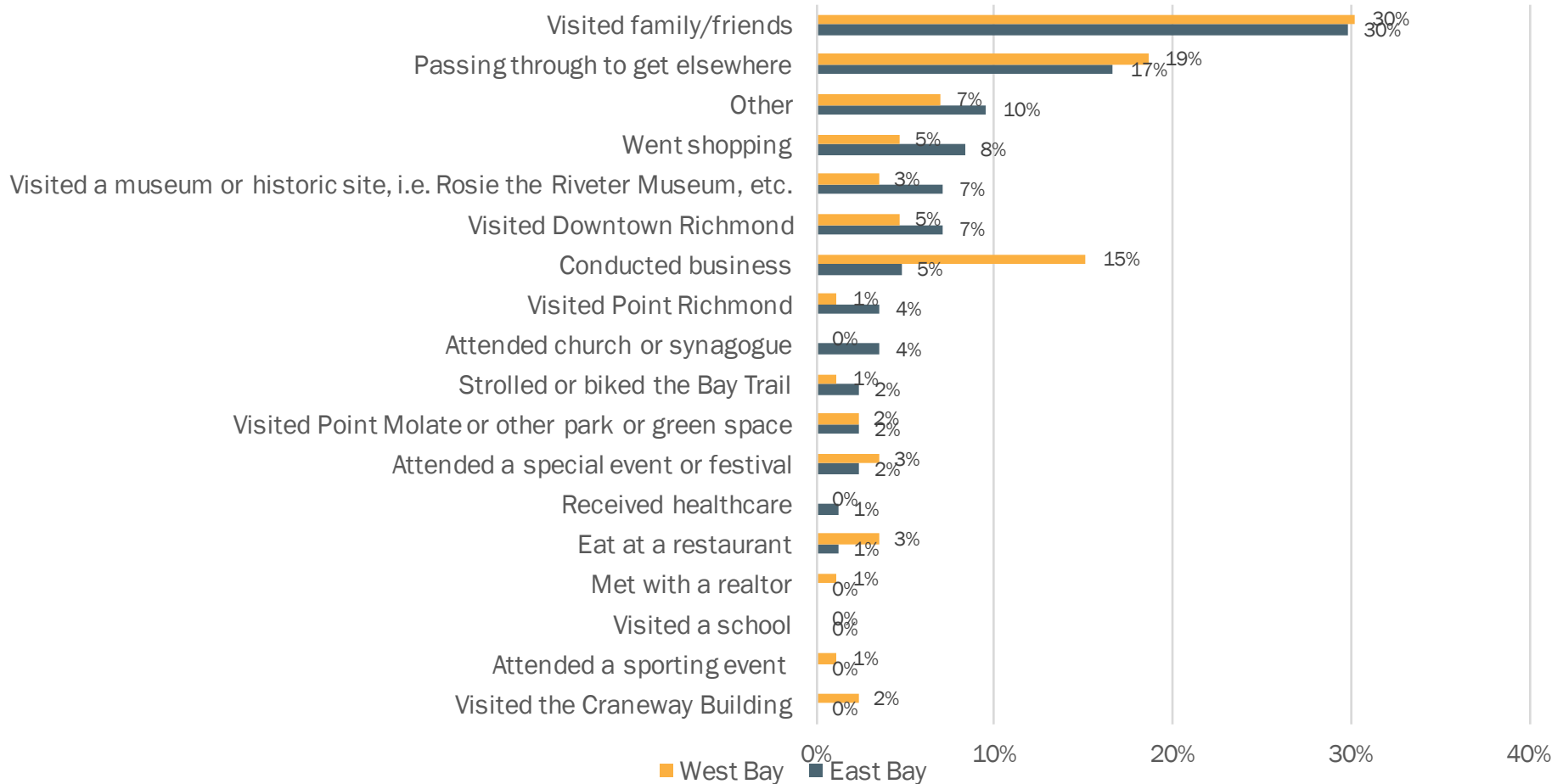
What was your primary purpose for visiting Richmond on your most recent visit?



Other: Kaiser hospital, work, volunteer

CAP Study

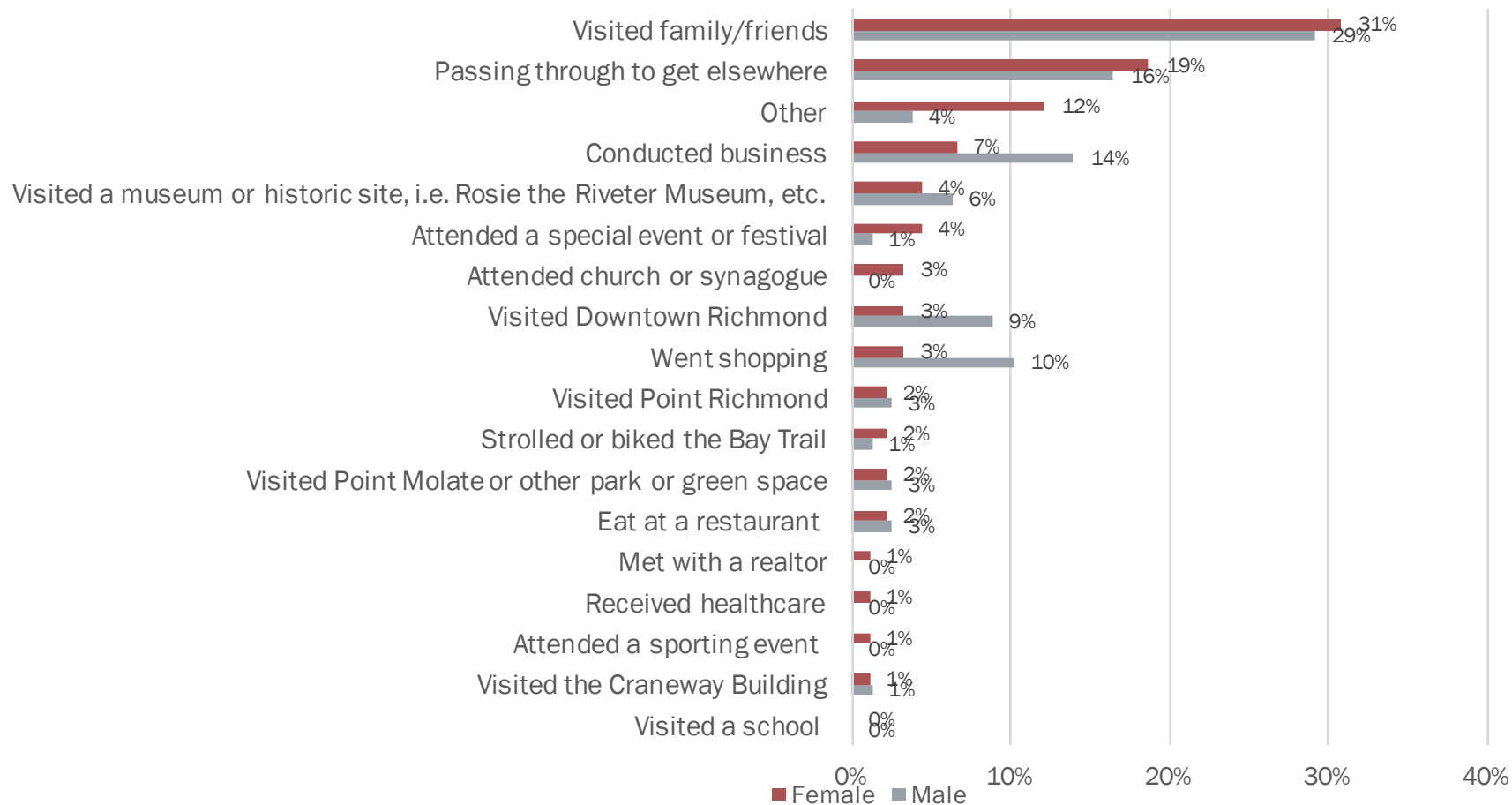
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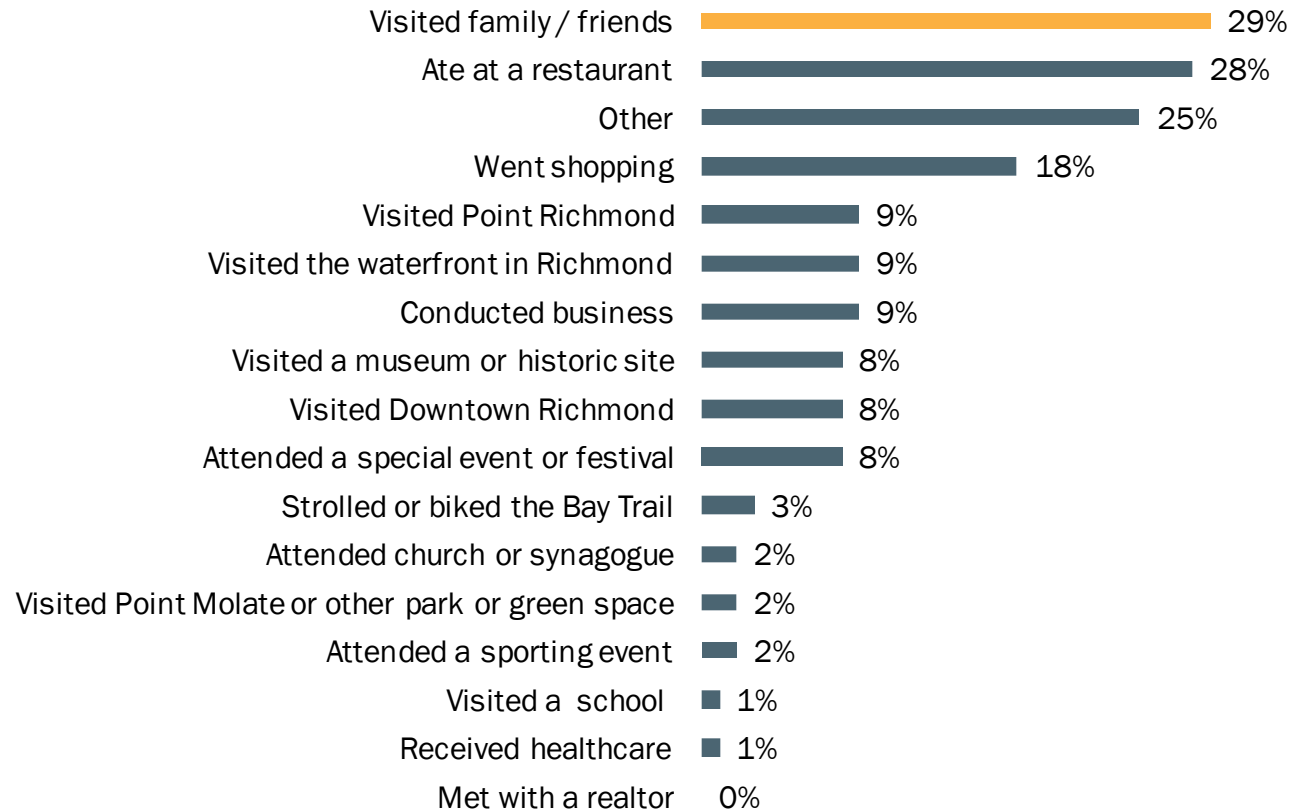
What was your primary purpose for visiting Richmond on your most recent visit?



Other: Kaiser hospital, work, volunteer

CAP Study

What else did you do on your most recent trip to Richmond? Choose all that apply.



Other: Nothing, just passing through, got gas

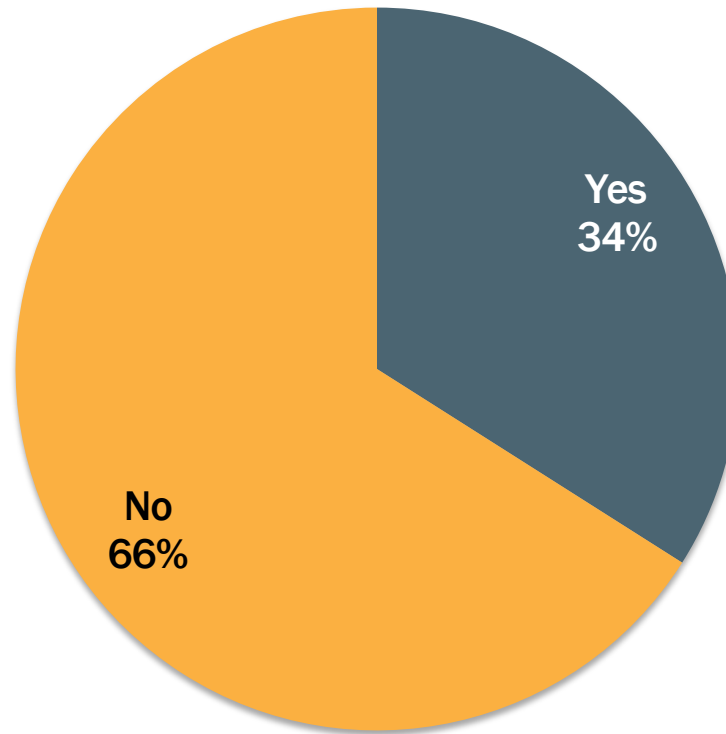
CAP Study

How would you describe your perception of Richmond before you visited?

- “Not safe, overshadowed by Chevron’s presence (industrial blight and pollution), but is trying to turn things around”
- “A more poor, industrial, dysfunctional version of Oakland”
- “It has a nice waterfront”
- “Parts are safe an pleasant, other areas are more dangerous”
- “Dangerous, crime ridden, industrial and corrupt”
- “Businesses and residences by the bay, easy freeway access for Golden Gate or bay bridges. A city with untapped potential”

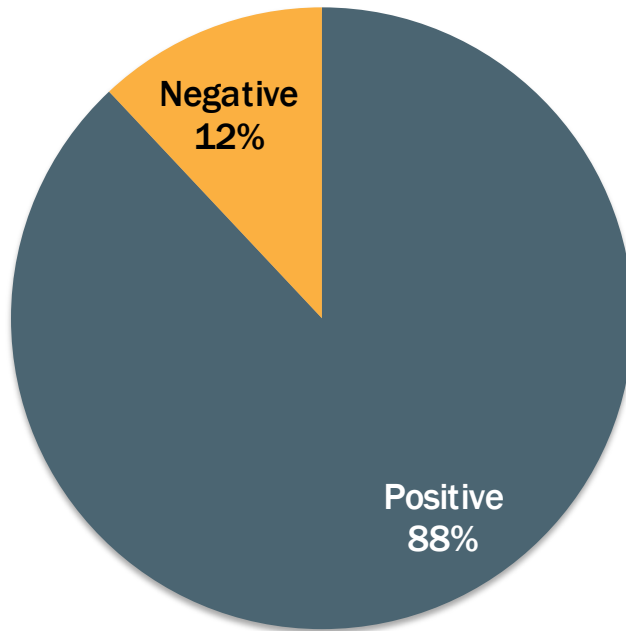
CAP Study

Did your perception of Richmond change once you visited the city?



CAP Study

Did your perception change in a positive or negative way?



- “It seemed safer”
- “Beautiful scenery, broad streets and lots of shops”
- “People who live there are trying to improve the quality of life. It’s got a lot of potential”
- “The area that we visited has been redeveloped recently so it was a beautiful location to visit and explore”
- “It was much cleaner than the last time I visited”
- “Very well organized, good public areas, beautiful views”

CAP Study

What aspect of the Richmond community leaves the greatest positive impression on visitors and newcomers?

- “Beauty of the shoreline and the Rosie the Riveter Museum”
- “Diversity and affordable housing”
- “It’s not as crowded as the rest of the Bay”
- “Point Richmond is the crown jewel of the area”
- “The residents are friendly and there is a very relaxed atmosphere”
- “Great shopping and restaurants”
- “Breathtaking waterfront views”
- “Bridge and freeway access makes it accessible”
- “There is a lot of culture in Richmond, especially downtown”

What aspect of the Richmond community leaves the greatest negative impression on visitors and newcomers?

- “The city isn’t very clean and a lot of buildings are blighted”
- “Crime, poverty, violence”
- “Gang activity”
- “There are some serious troubles at the Chevron refinery and it makes Richmond overall less desirable”
- “A lack of governmental guidance”
- “Severe industrial pollution”
- “Dirty, trash on the streets, graffiti, etc. Doesn’t seem well taken care of”
- “There doesn’t seem to be a lot of economic opportunity”

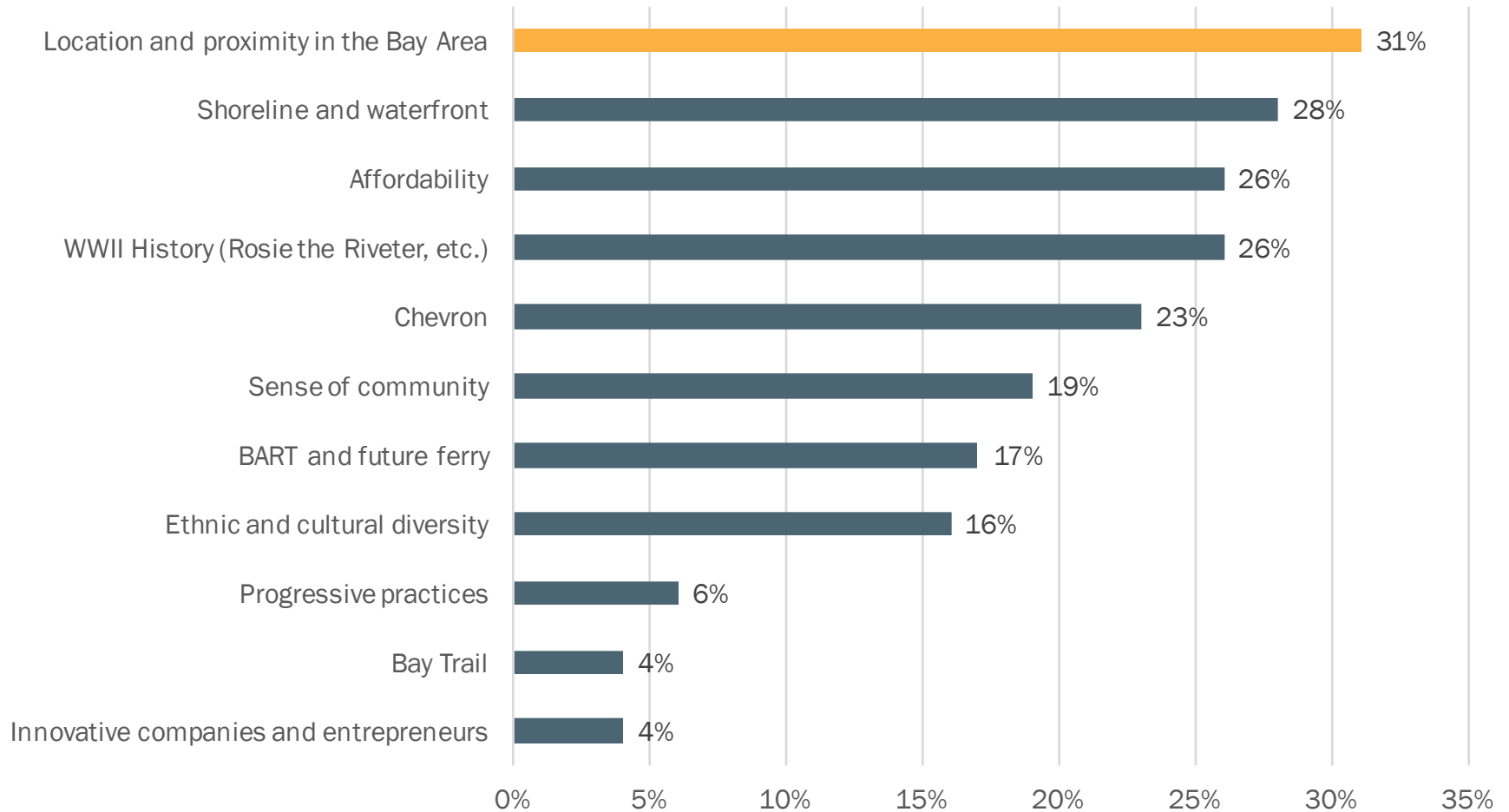
CAP Study

What differentiates Richmond from other East Bay communities?

- “Richmond is located close to the San Rafael bridge, and being between two beautiful cities. it has the potential of being a great city to live in”
- “Higher rates of crime and poverty”
- “It has Chevron and is overall more industrial”
- “Long history, many families have lived there for generations”
- “Very affordable and diverse”
- “Richmond is struggling more than other communities”
- “Long and fascinating history as a shipbuilding town”
- “Health risks because of air quality”
- “Probably the most affordable real estate on the waterfront”

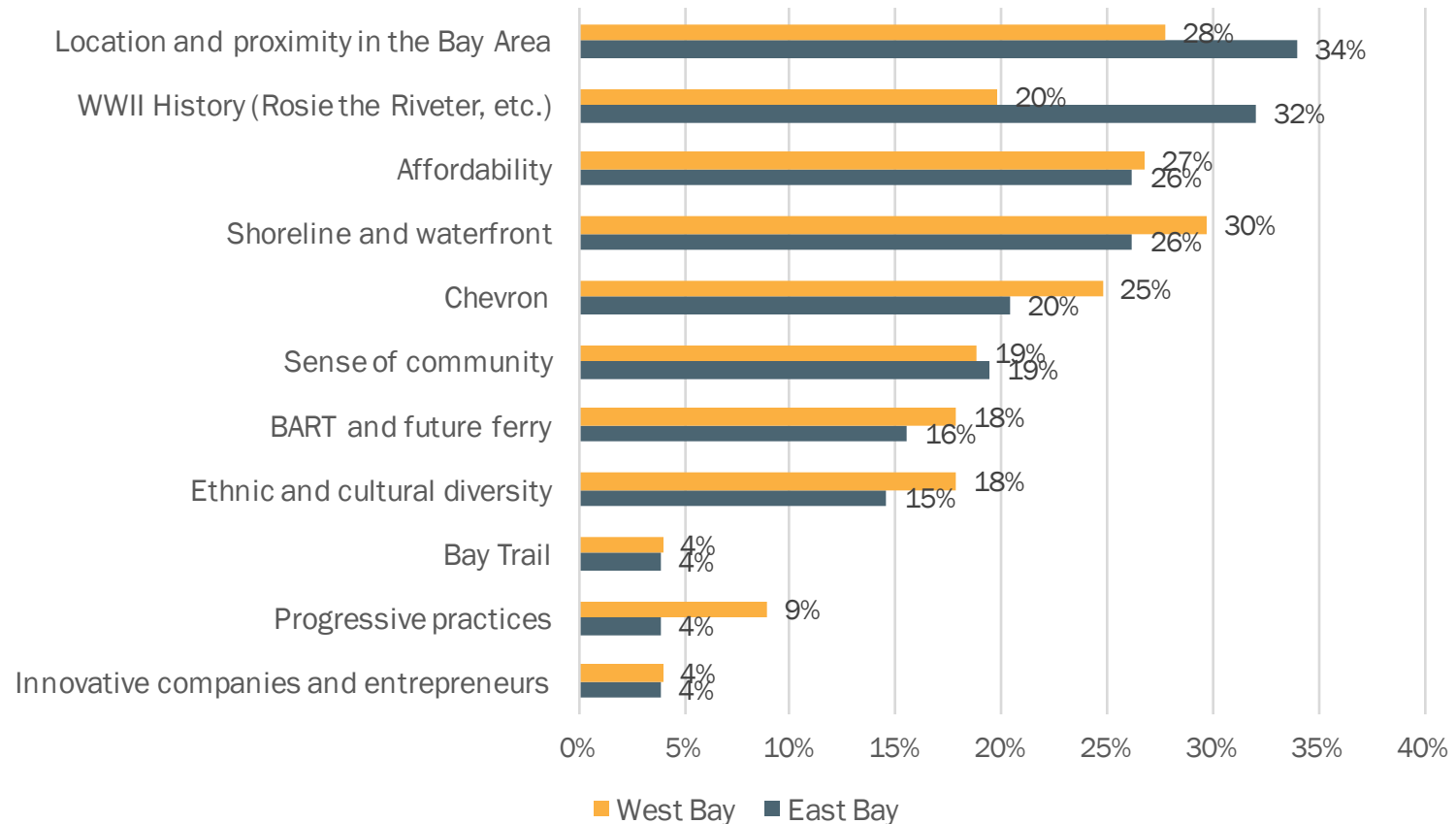
CAP Study

Of the options below, which is the most important to the identity and reputation of the Richmond community?
Choose two answers.



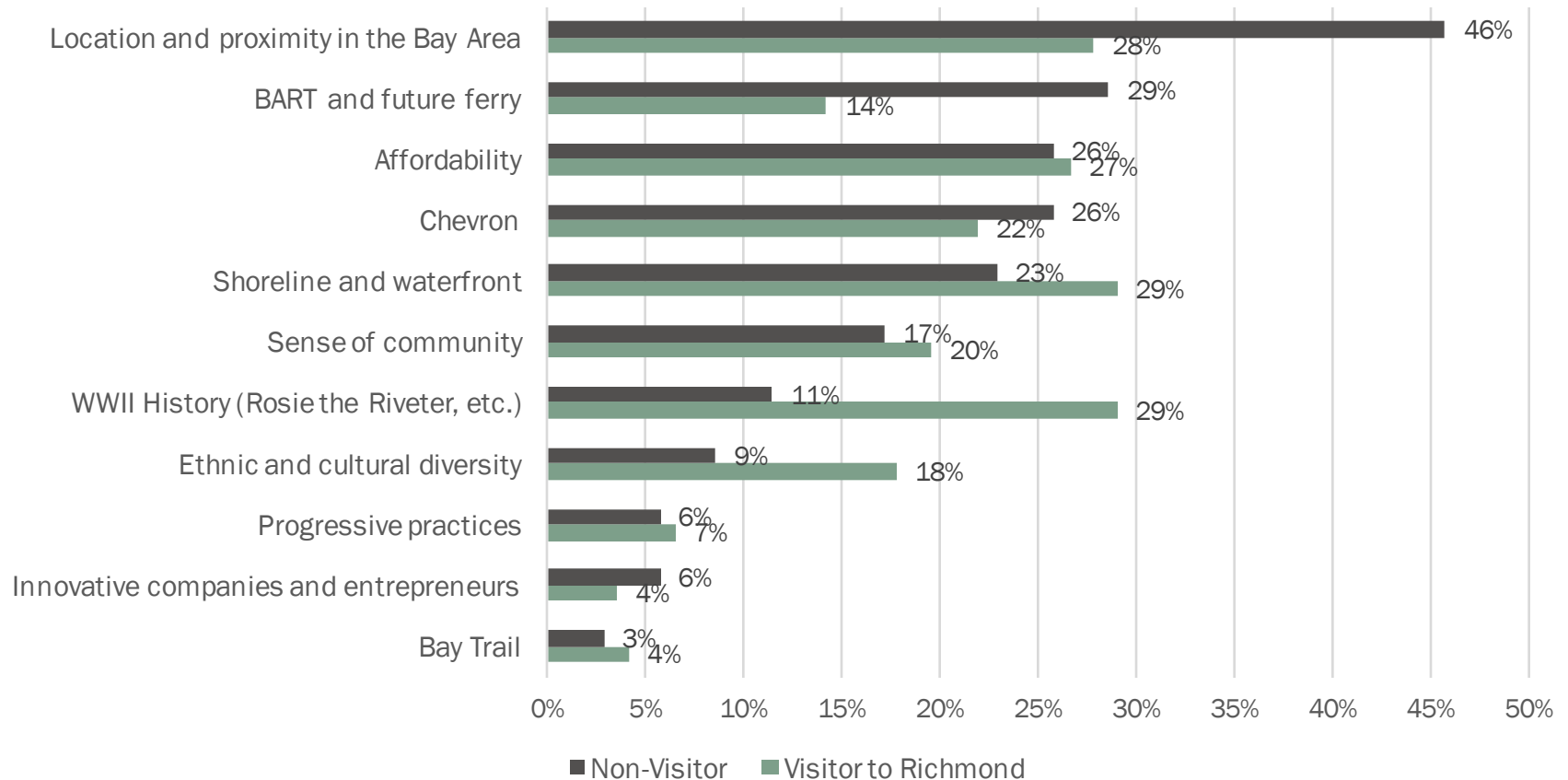
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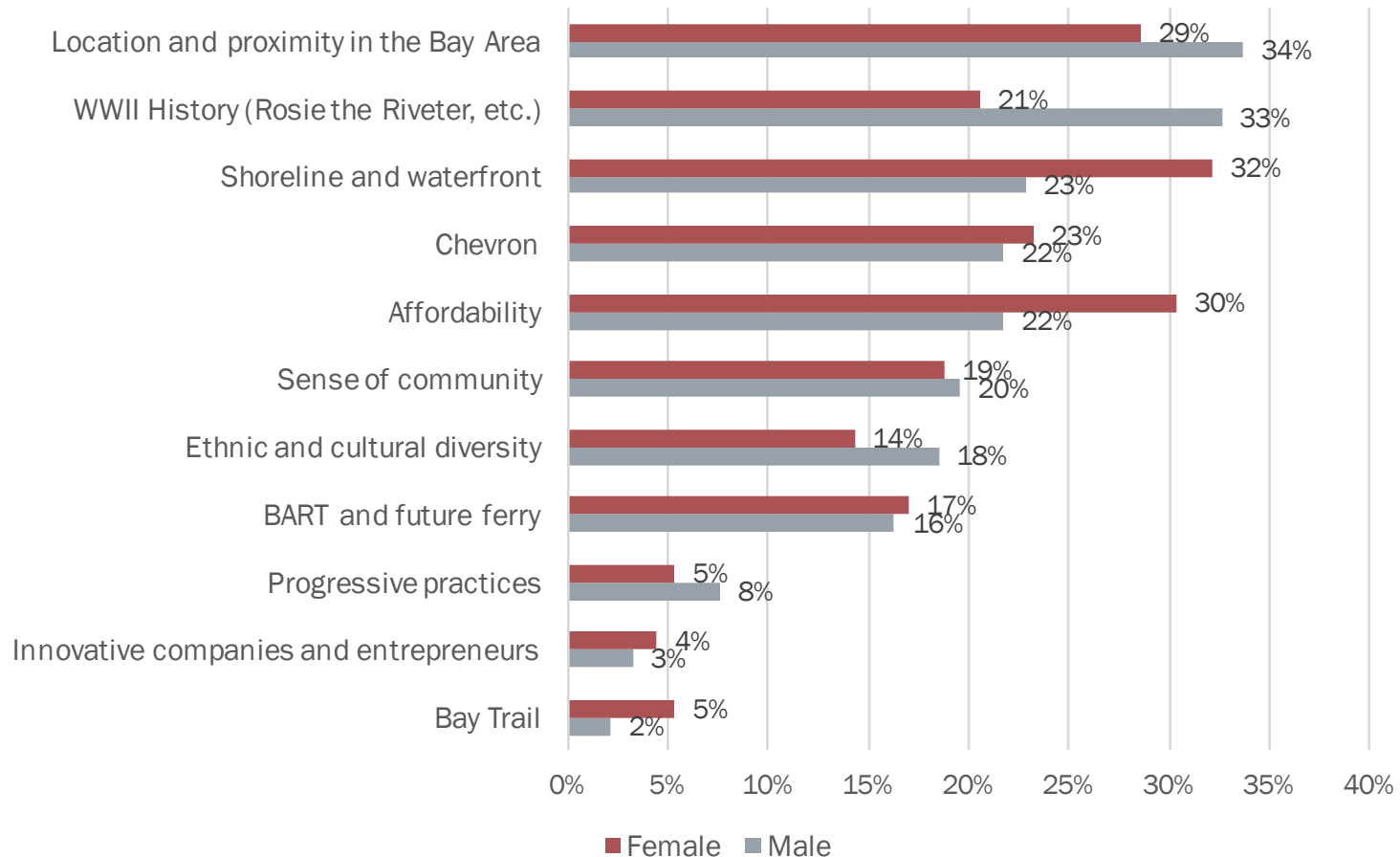
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CAP Study

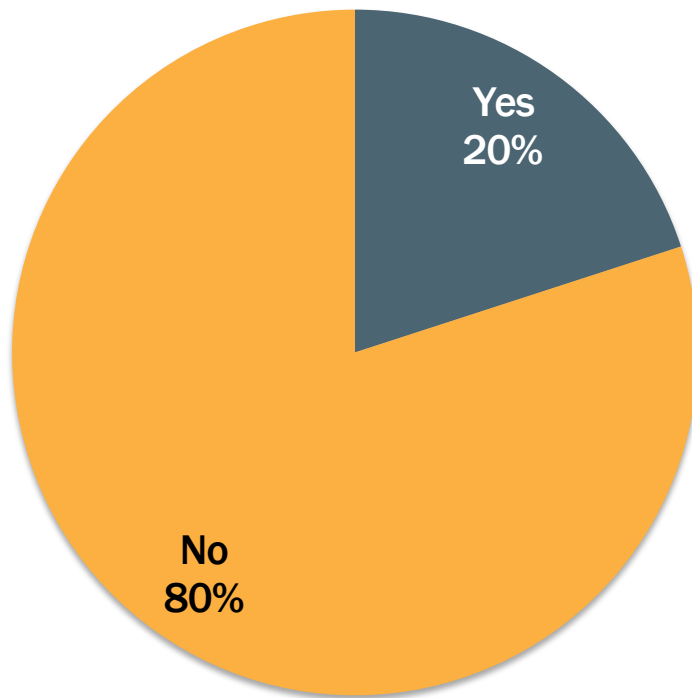
In your opinion, how can Richmond improve its reputation and increase awareness in the Bay Area?

- “Advertise what the city has to offer”
- “By reducing crime and cleaning up the streets”
- “Hosting an art event downtown to draw in more visitors from the rest of the Bay Area”
- “Advertise the affordable housing and show the parts of the city that aren’t as affected by crime, drug use and gang violence”
- “Promote any drop in the crime rate”
- “Try to attract start ups and small business owners with the low cost of renting office space”
- “Get rid of Chevron”
- “Progressive events and targeted marketing to those who view the area as unsafe”
- “Serious efforts to reduce crime and make the city safe”



CAP Study

Would you ever consider living in Richmond?

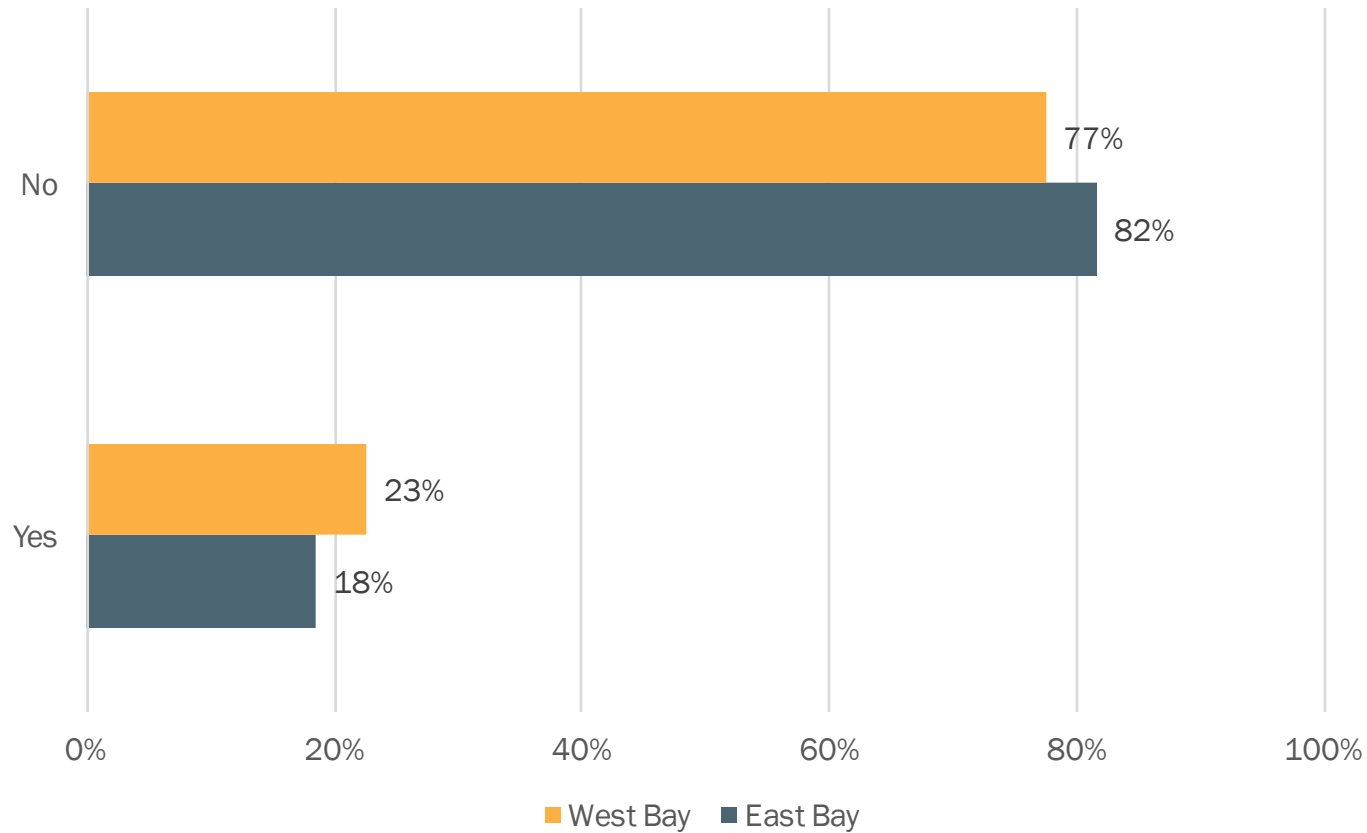


Why or why not?

- “It doesn’t seem like a good place to raise a family because of the pollution and crime”
- “It’s far from work and I don’t know anyone there”
- “I’m happy where I am now”
- “There are better options in the Bay Area”
- “I don’t feel safe there”
- “I would move there because of the affordable waterfront views”
- “It’s cute with lots of culture and history”

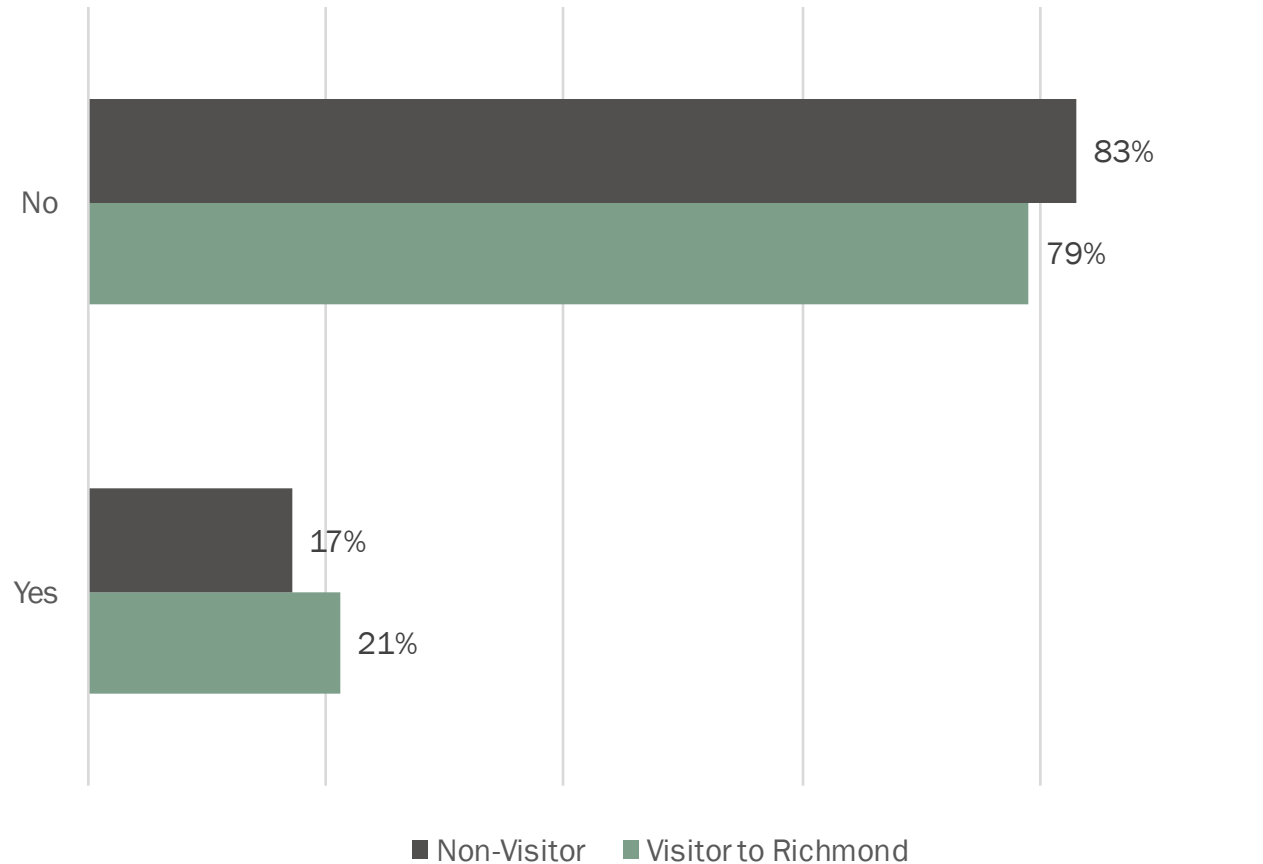
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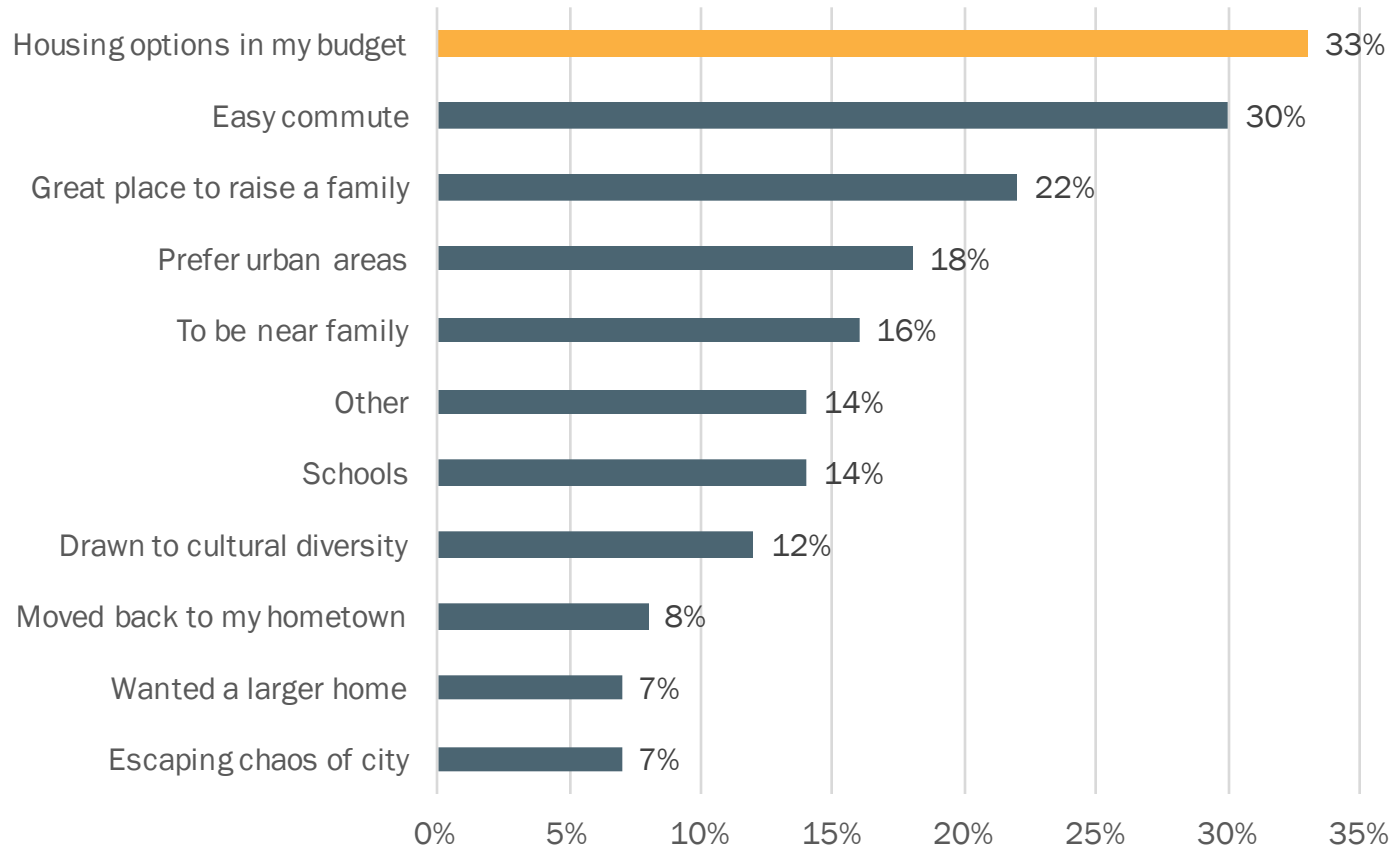
CAP Study

Would you ever consider living in Richmond?



CAP Study

What motivated you most to choose the city in which you now live? Choose two answers.



Other: Work, location, safety

PERCEPTION STUDY

Purpose

The purpose of the Perception Study is to gain an in-depth understanding of the brand perceptions of Richmond among important target audiences. What do these constituents of the brand have to say about the area as a place to operate a business, live, work or visit?

Methodology & Results

North Star consultants conducted perception interviews via telephone. The targeted audiences included leaders from competitor communities, business owners, developers, tourism and economic development officials and regional partner agencies. Questions were phrased to gather qualitative information. The following pages contain the most insightful conversations.

PERCEPTION STUDY

EXTERNAL

ASSETS

History

Waterfront, marinas

Industrial strength

Chevron

BART access

Affordable

Diversity

Berkeley Global Campus

Innovative policy initiatives

CHALLENGES

Political dysfunction

Crime, gangs

No reasons to visit (drive-thru)

Weak education

Negative headlines

Chevron

Traffic (880 worst in Bay Area)

Relationship with Chevron

Low income housing

OPPORTUNITIES

Marketing and promotion

Chevron relationship

Future ferry

Berkeley Global Campus

Waterfront

Vibrant Downtown

Innovative businesses

Proximity to UC Berkeley

Available space

PERCEPTION STUDY

Voices From the Research

- “I have never been in Richmond that I didn’t feel safe, but I have no reason to go there.”
- “Here’s a city that is broke beyond repair, they are doing anything they can to kick out their anchor tenant.”
- “I know there is a very adversarial relationship.”
- “Rosie the Riveter State Park. It’s brilliant, because it captures the industrial strength in Richmond.”
- “Richmond is capturing the nostalgia for WWII and for women. Exactly the thing it should be promoting for itself.”
- “Richmond has such an apathetic poor community.”
- “Their political willingness to take on very challenging and cutting edge policy initiatives. They did the whole mortgage/domain. The soda tax.”
- “Despite the positives I have about the community their leadership does not set the best foundation for how they are perceived in the region.”
- “It needs to overcome not being just a drive thru.”
- “Crazy city council. They’ve tried to sue everyone, grabbing headlines for outlandish city council behavior. Kind of off the chart inappropriate, personal attacks, gender and racial slurring.”
- “Richmond has such an apathetic poor community.”
- “Their political willingness to take on very challenging and cutting edge policy initiatives. They did the whole mortgage/domain. The soda tax.”
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PERCEPTION STUDY

Voices From the Research

- “It needs to overcome not being just a drive thru.”
- “Crazy city council. They’ve tried to sue everyone, grabbing headlines for outlandish city council behavior. Kind of off the chart inappropriate, personal attacks, gender and racial slurring.”
- “Scenic but hard to get to.”
- “City and Chevron are in constant discord.”
- “They are viewed a little bit as divisive, most articles are about battles over issues.”
- “Rise above it and try to focus more on the positive stories going on.”
- “I do associate it with the industrial waterfront.”
- “I think they are different because they haven’t promoted themselves.”
- “I know their governmental agency is doing a lot of great work and have a vibrant government structure. Glad to see they are doing this branding effort.”
- “Richmond has a lot of catching up to do in promotion.”
- “I don’t think anyone outside Richmond would go there.”
- “A community that is a well kept secret and a community that is probably somewhere you should explore especially in the waterfront because there is a lot of history there.”
- “I think there is a perception of lawlessness that is difficult to address as a marketer.”
- “A ferry going from San Francisco to Richmond? It’s awesome. Potential game changer.
- “It’s missing a little directory of what’s cool in Richmond, you can glance at it, go online, and see in one place.”

TAPESTRY STUDY

Purpose

A Tapestry Study was conducted to understand the target audience's lifestyle in detail. This included complete profiling reports for Richmond and a regional comparison (San Francisco-Oakland-Hayward MSA). This allows us to paint a comprehensive picture of your community as well as the differences between Richmond consumers and the comparison region.

Methodology & Results

Tapestry represents the fourth generation of market segmentation systems that began 30 years ago. This powerful tool classifies U.S. neighborhoods in the following ways:

- Community Tapestry Segments:
 - 67 groups based on sociographic and demographic composition
 - Considers income, occupation, educational attainment, ethnic origin, household composition, marital/living arrangements, patterns of migration, mobility and communication, lifestyle/media patterns
 - Most distinct level of segmentation

TAPESTRY STUDY

The results from the Tapestry studies can be classified into two main reports:

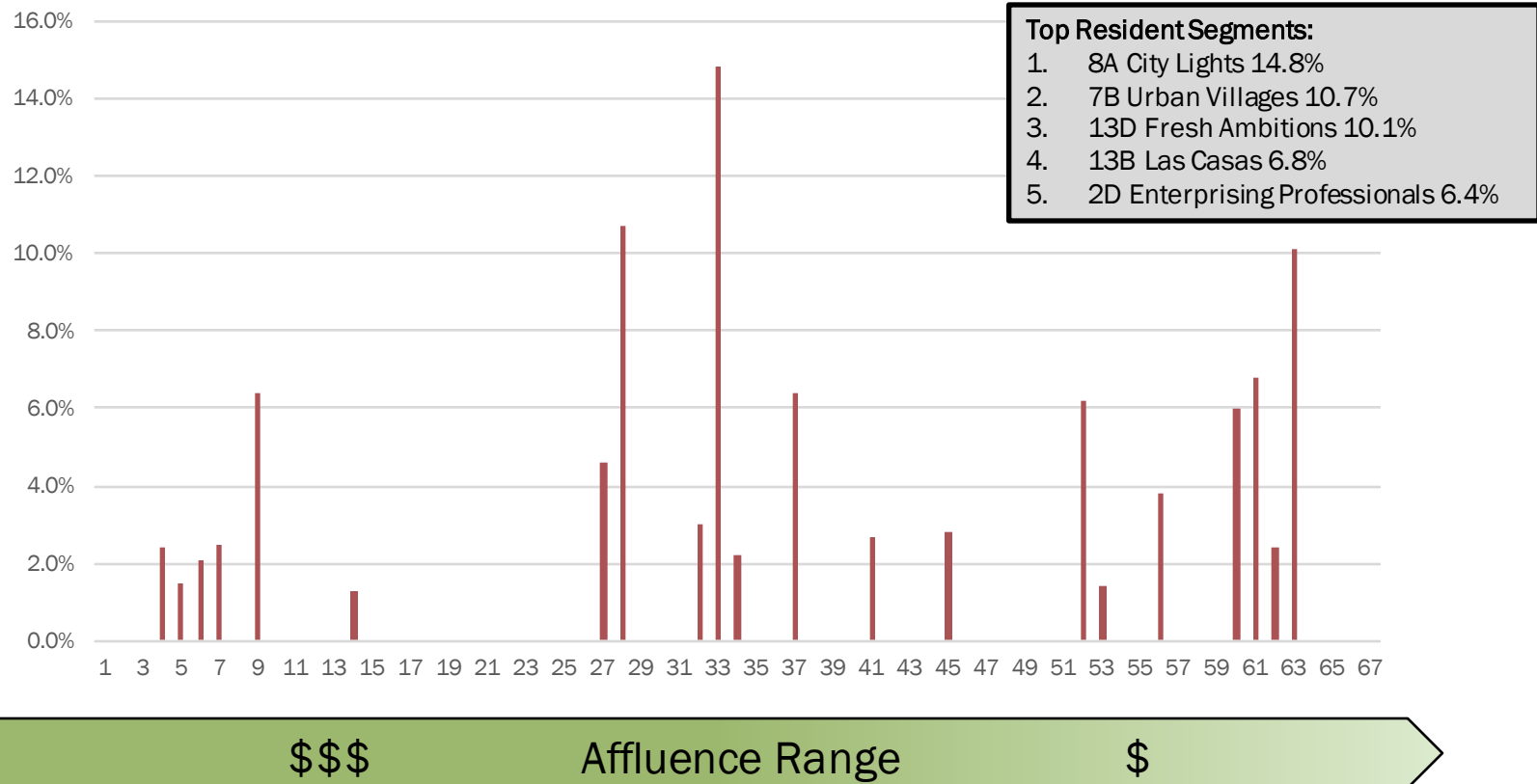
- Who Report:
 - Profiles the demographic and lifestyle segmentation of the population
 - Classifies the population in each of the ways outlined above and indexes the population under study against national averages
- What Report:
 - Provides a detailed profile of the core population for 37 separate lifestyle and media groups in over 2,200 sub-categories
 - Each category is indexed against the average U.S. resident to determine whether a member of the population under study is more or less likely to exhibit the specific behavior

Key findings from the Community Tapestry reports are shown on the following pages.

For the comprehensive Tapestry Who and What reports, please refer to **Appendix D** on the Final Report CD. For further explanation of any data or methodologies used to analyze the Tapestry reports, please refer to the Tapestry Handbook found at this link: <https://doc.arcgis.com/en/esri-demographics/data/tapestry-segmentation.htm>.

Top Resident Segments

Richmond residents represent twenty-one segments, *City Lights* being the most distinguished of the segments.



Tapestry Study

RESIDENT SEGMENT SPOTLIGHT: The U.S. average sits at 100

33 City Lights (14.8%) - Indexed 1001 against the U.S. average

- Enjoy dense city living in single family homes, high rise apartments and townhomes in the middle of it all
- Median age is 38.8 and median HHI is \$60,000
- City Lights residents earn above average incomes, but lag the nation in net worth. Labor force participation exceeds the US average
- These consumers are price savvy but will pay for quality brands they trust. These are health-conscious consumers, who purchase low-calorie and low-fat food
- Reflecting the diversity of their neighborhoods, residents stand by their belief in equal opportunity
- Attuned to nature and the environment, and when they can, purchase natural products
- Most residents have high-speed Internet access at home and use their computers for basic browsing and some shopping. They find technology cumbersome, preferring to make a phone call rather than text. They aren't that keen on social media either

28 Urban Villages (10.7%) – Indexed 992 against the U.S. average

- Multigenerational families living together in the urban environment. They all work together to build wealth for the entire family. They are a very diverse and multicultural group
- Median age is 33.3 and median HHI \$58,000
- Saving is more limited than spending in this young market
- They carry credit cards, but banking is basic. They are likely to pay bills in person or online
- Media preferences vary, but feature culturally specific channels or children's shows
- Leisure includes family activities like going to water parks, gardening, and clubbing, plus sports like soccer and softball

Tapestry Study

RESIDENT SEGMENT SPOTLIGHT: The U.S. average sits at 100

63 Fresh Ambitions (10.1%) – Indexed 1557 against the U.S. average

- Young, start-up families, many of whom are new to the U.S
- Median age is 28.0 and median HHI is \$26,000
- Are not highly educated and often live paycheck to paycheck. They are also twice as likely to live in multigenerational homes
- Price-conscious consumers, they budget for fashion, not branding. However, parents are happy to spoil their brand savvy children
- These residents maintain close ties to their culture; they save money to visit family, but seek out discount fares over convenience

61 Las Casas (6.8%) – Indexed 914 against the U.S. average

- Primarily young renters, although many of these households are also multigenerational
- More than 42% of the population was born abroad; 30% of the households have members who speak only Spanish
- Unemployment is high at 12.5%; labor force participation is average
- The average household size is 4.09, above the national average, and HHI is \$37,000
- Media preferences overwhelmingly favor Spanish-language channels and websites. Residents are soccer fans

Tapestry Study

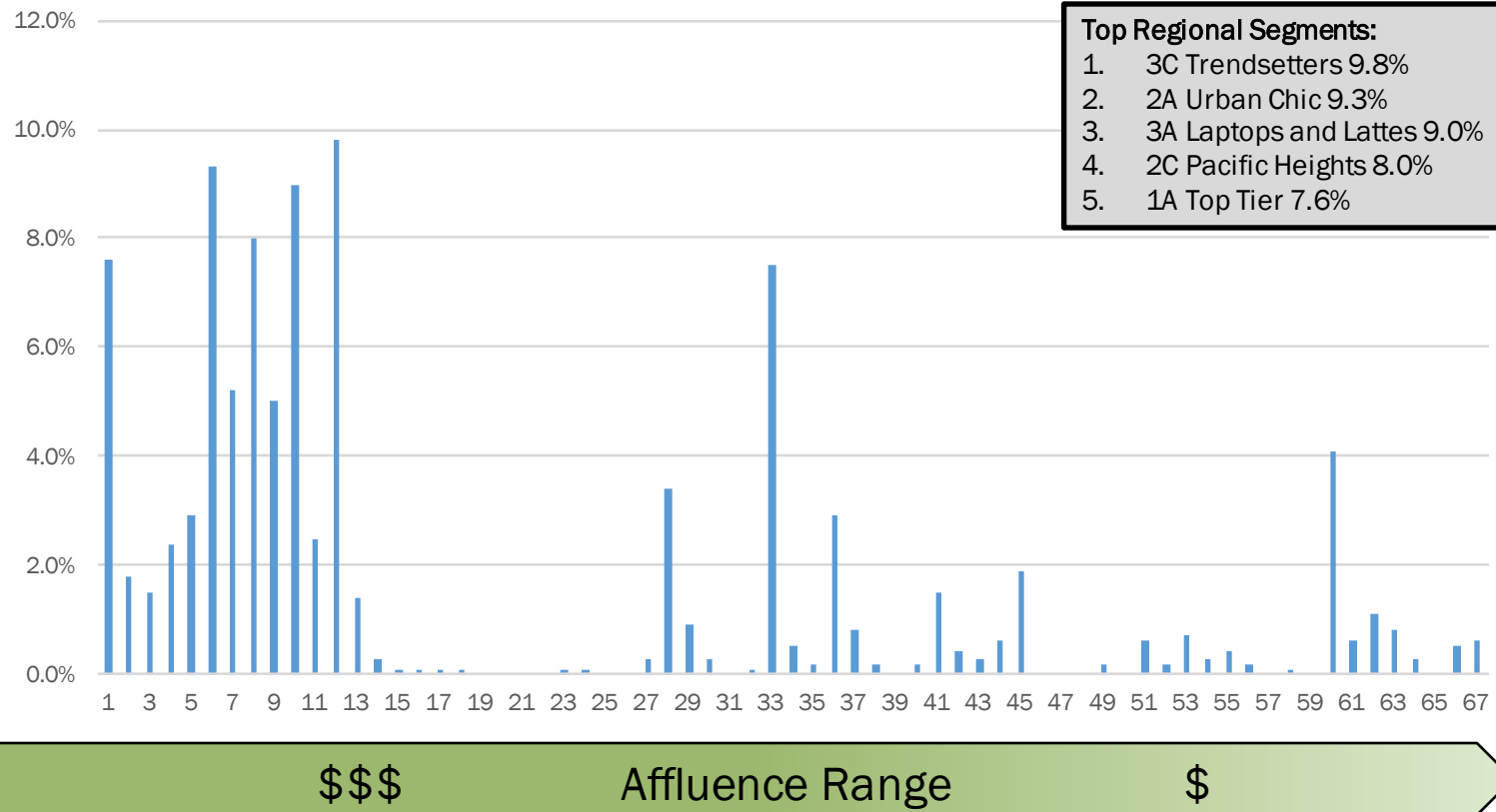
RESIDENT SEGMENT SPOTLIGHT: The U.S. average sits at 100

09 Enterprising Professionals (6.4%) – Indexed 494 against the U.S. average

- Young, highly-educated, working professionals; either single or recently married.
- Median age is 32.8 and median HHI is \$63,837. Approximately half of the population ages 25 years or older hold a college or graduate level degree.
- Seek growth opportunities and go where the jobs are available, changing cities and homes frequently.
- They are nomadic but very well connected through Internet and cell phones. Use internet daily for everything from finding jobs to buying consumer goods. Collect electronic equipment; do not invest in home furnishings.
- They eat out at Cheesecake Factory and Chili's Grill and Bar. They shop for groceries at stores such as Publix and Albertson's. They love to travel, go to concerts and movies and stay physically fit.

Top Regional Segments

Regional residents (San Francisco-Oakland-Hayward MSA) represent twenty one segments, *Trendsetters* being the most distinguished of the segments.



Tapestry Study

REGIONAL SEGMENT SPOTLIGHT: The U.S. average sits at 100

12 Trendsetters (9.8%) - Indexed 919 against the U.S. average

- Median age 35.5, median household income \$51,000, average household size 2.10
- Approximately 75% rent in upscale, multiunit structures
- High-rent cities like New York; San Francisco; Chicago; and Washington, DC are popular among renters willing to pay well above US average rent (Index 140)
- Commuting can take up to an hour; public transportation, walking, and biking are popular; many own no vehicle
- These residents are young and well educated; almost half have a bachelor's degree or more. • Well paid, with little financial responsibility, these consumers are spenders rather than savers. They seek financial advice and are already building their stock portfolios
- Image is important to these consumers. They use the Internet to keep up with the latest styles and trends and shop around for good deals
- Trendsetters residents travel often, exploring new destinations and experiences
- Socially and environmentally conscious, they are willing to pay more for products that support their causes
- Up-to-date on technology, they explore and exploit all the features of their smartphones
- They are attentive to good health and nutrition

Tapestry Study

REGIONAL SEGMENT SPOTLIGHT: The U.S. average sits at 100

6 Urban Chic (9.3%) - Indexed 706 against the U.S. average

- Median age is 42.6, median household income \$98,000, average household size 2.37
- More than half of Urban Chic households include married couples; 30% are singles
- Average household size is slightly lower at 2.37
- Homes range from prewar to recent construction, high-rise to single family. Over 60% of householders live in single-family homes; more than one in four live in multiunit structures
- Two-thirds of homes are owner occupied
- Major concentrations of these neighborhoods are found in the suburban periphery of large metropolitan areas on the California coast and along the East Coast
- Most households have two vehicles available. Commuting time is slightly longer, but commuting by bicycle is common (Index 236)
- Well educated, more than 60% of residents hold a bachelor's degree or higher (Index 223)
- Unemployment rate is well below average at 5% (Index 62); labor force participation is higher at 69%
- Residents are employed in white collar occupations—in managerial, technical, and legal positions
- Over 40% of households receive income from investments
- Environmentally aware, residents actively recycle and maintain a “green” lifestyle
- These busy, tech-savvy residents use PCs extensively for an array of activities such as shopping, banking, and staying current—a top market for Apple computers

Tapestry Study

REGIONAL SEGMENT SPOTLIGHT: The U.S. average sits at 100

10 Laptops and Lattes (9.0%) - Indexed 863 against the U.S. average

- Median age 36.9, median household income \$93,000, average household size 1.85
- 30-something single householders (Index 174), with a number of shared households (Index 246); low average household size of 1.85.
- City dwellers, primarily in apartment buildings: with 2–4 units (Index 190), 5–19 units (Index 223), or 20+ units (Index 548). • Older housing, 2 out of 3 homes built before 1970; 42% built before 1940 (Index 310).
- Most households renter occupied, with average rent close to \$1,800 monthly (Index 183).
- Many owner-occupied homes valued at \$500,000+ (Index 684).
- Majority of households own no vehicle at 36% (Index 398) or 1 vehicle (41%).
- Three out of four have a bachelor's degree or higher (Index 269).
- Unemployment rate is low at 5.3%; labor force participation is high, more than 75%.
- Salaries are the primary source of income for most households, but self-employment income (Index 147) and investment income (Index 167) complement the salaries in this market.
- These are health-conscious consumers, who exercise regularly and pay attention to the nutritional value of the food they purchase.
- Environmentally conscientious but also image-conscious: both impact their purchasing.

Tapestry Study

REGIONAL SEGMENT SPOTLIGHT: The U.S. average sits at 100

8 Pacific Heights (8.0%) - Indexed 1,105 against the U.S. average

- Median age 41.8, median household income \$84,000, average household size 3.13
- These are diverse, densely populated neighborhoods in the urban periphery of metropolitan areas
- Homes are primarily owner occupied and older, most built 1950–1979 (58%)
- Two-thirds of homes are single family; 14% are townhouses (Index 242)
- About 45% of owned homes are valued at over \$500,000 (Index 510)
- Percentage of vacant housing units at 4.6% is one of the lowest (Index 41)
- About 61% of households are composed of married couple families, with or without children under 18 years, with a higher ratio of adult children living at home (Index 157)
- Two-thirds of households own 1 or 2 vehicles, but 28% own 3 or more (Index 140)
- Education completed: Almost 65% of residents have some college education; 38% have a bachelor's degree or higher (Index 134)
- Labor force participation rate is average at 62%; unemployment rate is lower at 7.2%
- Salaries account for most of the household income among these professionals, but investment income adds to their affluence
- Financially conservative, these consumers tend to opt for low-risk investments
- They keep up-to-date with the latest styles and trends, as well as the latest technology

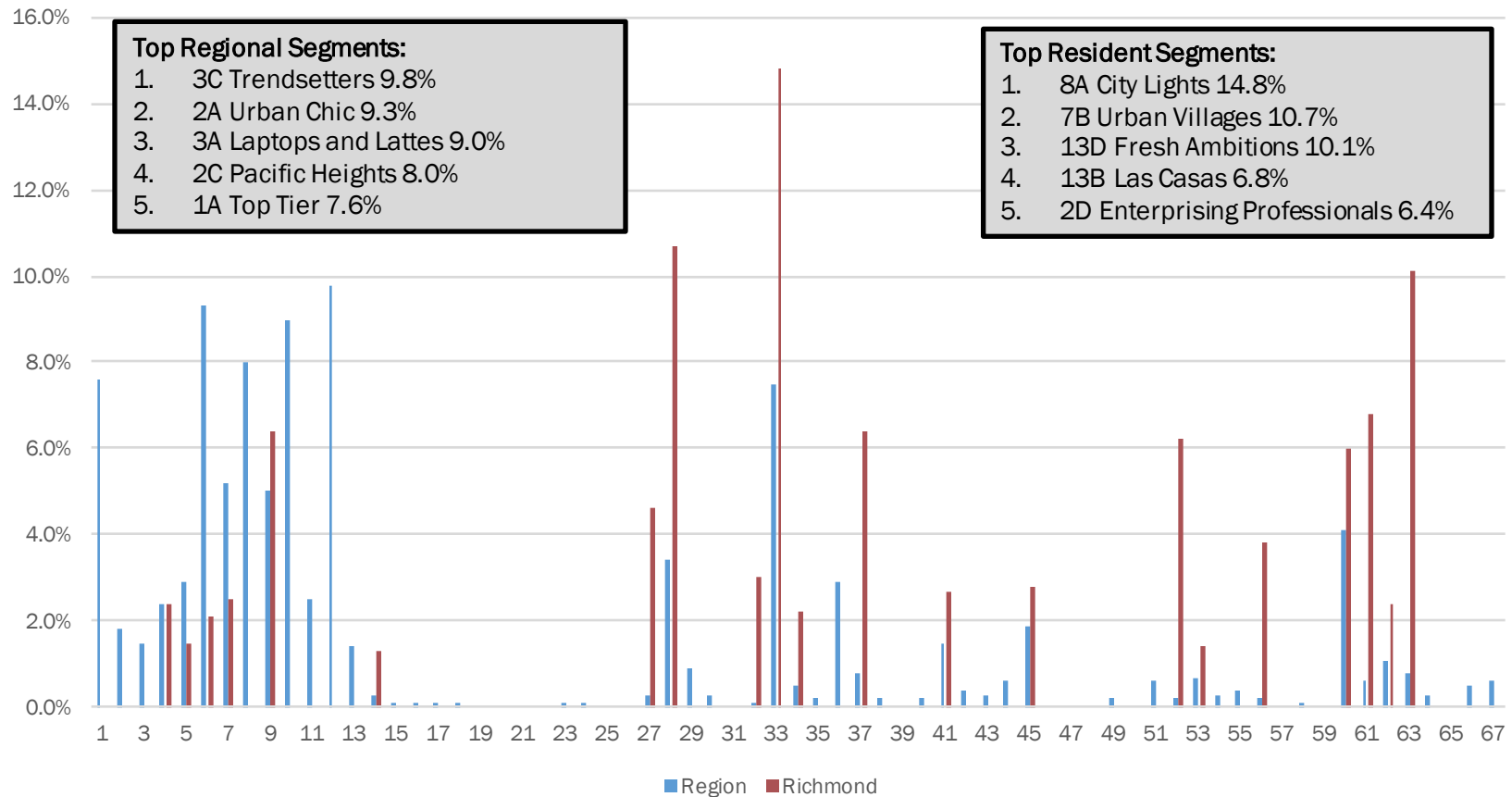
Tapestry Study

REGIONAL SEGMENT SPOTLIGHT: The U.S. average sits at 100

1 Top Tier (7.6%) - Indexed 440 against the U.S. average

- Median age 46.2, median household income \$157,000, average household size 2.82
- Married couples without children or married couples with older children dominate this market
- Housing units are owner occupied with the highest home values—and above average use of mortgages
- Neighborhoods are older and located in the suburban periphery of the largest metropolitan areas, especially along the coasts
- Top Tier is a highly educated, successful consumer market: more than one in three residents has a postgraduate degree
- Annually, they earn more than three times the US median household income, primarily from wages and salary, but also self-employment income (Index 177) and investments (Index 242)
- These are the nation's wealthiest consumers. They hire financial advisers to manage their diverse investment portfolios but stay abreast of current financial trends and products
- Socially responsible consumers who aim for a balanced lifestyle, they are goal oriented and hardworking but make time for their kids or grandkids and maintain a close-knit group of friends
- These busy consumers seek variety in life. They take an interest in the fine arts; read to expand their knowledge; and consider the Internet, radio, and newspapers as key media sources
- They regularly cook their meals at home, attentive to good nutrition and fresh organic foods

Regional & Resident Comparison



\$\$\$

Affluence Range

\$

Richmond Residents & Regional Residents (San Francisco-Oakland-Hayward MSA)

Once segments have been identified, we can draw conclusions about consumer habits and lifestyle preferences.

Lifestyle/Media Groups:

Apparel, Appliances, Attitudes, Automobiles, Auto/Aftermarket, Baby Products, Alcohol, Books, Cameras, Civic Activities, Convenience Stores, Electronics, Financials, Furniture, Garden/Lawn, Grocery, Health, Home Improvement, Insurance, Internet, Leisure, Yellow Pages, Watch, Read, Listen, Personal Core, Pets, Restaurant, Shopping, Smoking, Sports, Telephone, Tools, Toys/Games, Travel, Video/DVDs, Miscellaneous

Note: The following brands are meant to be representative examples and may not exist in your area

Profile: Richmond and Region

Attitudes: The U.S. average sits at 100

Richmond

Attitudes- Top	Index
Buying American is slightly important to me	203
Buying American is not important to me	201
Have seen ad on phone booth in last 6 months	188
Like taking investment risk for high return	182
Buy vehicles that show environ support	181

Attitudes- Bottom	Index
Wrote something that was published in last 12 mo	63
Wrote or called a politician in last 12 months	62
Served on committee for local organization	58
Political party affiliated with: Republican	54
Political outlook: very conservative	51

Region

Attitudes- Top	Index
Made contribution to NPR in last 12 months	302
Contributed to arts/cultural org in last 12 months	283
Political outlook: very liberal	247
Contributed to political org in last 12 months	230
Contributed to environmental org in last 12 months	227

Attitudes- Bottom	Index
Buying American is important to me	73
Very likely to buy a used vehicle next 12 months	71
Political outlook: very conservative	69
Do not use Internet for banking transactions	68
Rarely check food ingredients before buying	66

Profile: Richmond and Region

Automobiles: The U.S. average sits at 100

Richmond

Automobiles- Top	Index
Bought vehicle battery last 12 mo: AutoZone	219
Bought motor oil last 12 mo: at AutoZone	182
Bought muffler in last 12 months	169
Bought vehicle battery last 12 mo: Sears	164
Bought shock absorbers/struts in last 12 months	157

Automobiles - Bottom	Index
Bought motor oil last 12 mo: at Advance Auto Parts	48
Bought vehicle battery last 12 mo: Walmart	48
HH bought/leased new domestic vehicle last 12 mo	43
Bought motor oil last 12 mo: at Walmart	42
Most recent HH vehicle purchase/lease: Buick	41

Region

Automobiles- Top	Index
Rented car (personal use) last 12 mo: Hertz	230
Member of AAA auto club	200
Rented car (personal use) last 12 mo: Budget	199
Rented car for personal use in last 12 months	195
Most recent HH vehicle purchase/lease: Honda	187

Automobiles- Bottom	Index
Bought vehicle battery last 12 mo: Advance Auto Parts	43
Bought motor oil last 12 mo: at Advance Auto Parts	41
HH bought/leased used domestic vehicle last 12 mo	38
Bought vehicle battery last 12 mo: Walmart	36
Bought motor oil last 12 mo: at Walmart	35

Profile: Richmond and Region

Baby Products: The U.S. average sits at 100

Richmond

Baby Products- Top	Index
Used organic baby food in last 6 months	245
Used Gerber baby food in last 6 months	177
Used baby oil in last 6 months	169
Used infant cereal in last 6 months	167
Used teething remedy in last 6 months	160

Baby Products- Bottom	Index
Bought for child last 12 mo: doll accessories	75
HH owns playpen	74
Bought for child last 12 mo: water toy	73
Bought for child last 12 mo:electronic doll/animal	63
Bought for child last 12 mo: construction toy	62

Region

Baby Products- Top	Index
Used organic baby food in last 6 months	167
Used baby oil in last 6 months	138
Bought any toys/games online in last 12 months	131
Used baby food in last 6 months	111
Used baby nurser/bottle in last 6 months	109

Baby Products- Bottom	Index
Bought for child last 12 mo: doll accessories	74
Bought for child last 12 mo: sound game	72
Bought for child last 12 mo:electronic doll/animal	70
HH owns playpen	62
Used store-brand diapers/underpants in last 6 mo	59

Profile: Richmond and Region

Clothing: The U.S. average sits at 100

Richmond

Clothing- Top	Index
Bought athletic shoes in last 12 mo: Jordan	292
Bought athletic shoes in last 12 mo: Puma	288
Bought athletic shoes in last 12 mo: Converse	231
Bought suit/dress for child 1-2 in last 6 months	221
Bought for child <13 last 6 mo: slippers	210

Region

Clothing- Top	Index
Spent \$150+ on dry cleaning in last 6 months	383
Spent on clothing in last 12 months: \$2000+	282
Spent on big ticket women`s clothing: \$300+	260
Spent on big ticket men`s clothing/12 mo: \$200-299	233
Spent on clothing in last 12 months: \$1000-\$1999	201

Clothing- Bottom	Index
Bought clothing in discount store in last 6 months	72
Spent on clothing for child <13 last 6 mo: <\$51	72
Bought costume jewelry in last 12 months: necklace	71
Bought athletic shoes in last 12 mo: New Balance	71
Bought athletic shoes in last 12 mo: Skechers	69

Clothing- Bottom	Index
Bought athletic shoes last 12 mo: tennis	68
Spent on low ticket women`s clothing: \$50-\$99	68
Spent on clothing in last 12 months: <\$100	63
Bought work boots in last 12 months	59
Spent on clothing for child <13 last 6 mo: <\$51	52

Profile: Richmond and Region

Electronics/Internet: The U.S. average sits at 100

Richmond

Electronics/Internet- Top	Index
Visited any Spanish language website last 30 days	978
HH purchased video game system in last 12 months	284
Visited website in last 30 days: myspace.com	256
Visited website in last 30 days: tumblr.com	186
Visited website in last 30 days: yelp.com	180

Electronics/Internet- Bottom	Index
Connection to Internet at home: DSL	63
Own photo printer	63
Own telephoto/zoom lens	62
Own Kodak camera	61
Purch most recent home computer at dept/discount str	54

Region

Electronics/Internet- Top	Index
Visited website in last 30 days: yelp.com	1,051
Visited website in last 30 days: tumblr.com	388
Visited website in last 30 days: linkedin.com	378
Visited any Spanish language website last 30 days	329
Connection to Internet at home: fiber optic	317

Electronics/Internet- Bottom	Index
Spent on most recent home computer: <\$500	69
Printed digital photos in last 12 months	67
Connection to Internet at home: dial-up modem	51
Purch most recent home computer at dept/discount str	50
Own Kodak camera	47

Profile: Richmond and Region

Financial & Insurance: The U.S. average sits at 100

Richmond

Financial & Insurance- Top	Index
Have medical insurance: Kaiser Permanente	536
Obtained medical insurance: Medicaid	212
Have auto insurance: AAA	197
Wired/sent money in last 6 mo: using Western Union	171
Bank/financial institution used: Citibank	163

Financial & Insurance- Bottom	Index
Acquired home/pers property insur from agent	55
Own certificate of deposit (more than 6 months)	54
Have personal loan - not for education	54
Have life insurance w/total value: <\$20000	53
Have medical insurance: Humana	51

Region

Financial & Insurance- Top	Index
Have medical insurance: Kaiser Permanente	791
Bank/financial institution used: Citibank	445
Own/used card last 12 mo: American Express Green	372
Own/used card last 12 mo: American Express Blue	345
Credit/debit card rewards: airline miles	294

Financial & Insurance- Bottom	Index
Have personal loan - not for education	57
Have life insurance w/total value: \$20000-\$49999	55
Paid bills last 12 mo: in person	54
Have life insurance w/total value: <\$20000	50
Have medical insurance: Humana	50

Profile: Richmond and Region

Furniture/Appliances: The U.S. average sits at 100

Richmond

Furniture/Appliances- Top	Index
Used oven cleaner in last 6 months	183
HH owns clothes dryer (gas)	154
Used green prod/6 mo: recycled paper napkins	151
Used rubber gloves in last 6 months	147
Used toilet bowl cleaner (in-tank) in last 6 mo	146

Furniture/Appliances- Bottom	Index
HH owns electric fry pan	43
HH owns separate freezer	43
HH owns stove/range (electric)	43
HH owns generator (portable)	42
HH owns heat pump	40

Region

Furniture/Appliances- Top	Index
HH owns range/oven (built-in gas)	217
HH owns clothes dryer (gas)	204
HH owns espresso/cappuccino maker	172
HH owns stove/range (gas)	169
HH has central heating (oil)	164

Furniture/Appliances- Bottom	Index
HH owns electric can opener	58
HH owns separate freezer	57
HH has central heating (electric)	56
HH owns stove/range (electric)	52
HH owns deep fryer	47

Profile: Richmond and Region

Grocery/Alcohol: The U.S. average sits at 100

Richmond

Grocery/Alcohol- Top	Index
Shopped at grocery store/6 mo: Ralphs	879
Shopped at grocery store/6 mo: Vons	581
Used nectars in last 6 months	487
Shopped at grocery store/6 mo: Stop & Shop	340
Shopped at grocery store/6 mo: A & P	263

Grocery/Alcohol- Bottom	Index
Used canned chicken in last 6 months	55
Shopped at grocery store/6 mo: Kroger	47
Shopped at grocery store/6 mo: Piggly Wiggly	42
Shopped at grocery store/6 mo: Meijer	36
Shopped at grocery store/6 mo: IGA	25

Region

Grocery/Alcohol- Top	Index
Shopped at grocery store/6 mo: Ralphs	825
Shopped at grocery store/6 mo: Vons	532
Shopped at grocery store/6 mo: Trader Joe`s	497
Shopped at grocery store/6 mo: Whole Foods Market	448
Shopped at grocery store/6 mo: Stop & Shop	442

Grocery/Alcohol- Bottom	Index
Shopped at grocery store/6 mo: Walmart Supercenter	38
Shopped at grocery store/6 mo: Meijer	38
Shopped at grocery store/6 mo: Save-A-Lot	32
Shopped at grocery store/6 mo: Piggly Wiggly	26
Shopped at grocery store/6 mo: IGA	24

Profile: Richmond and Region

Health/Beauty: The U.S. average sits at 100

Richmond

Health/Beauty- Top	Index
Used tooth whitener (gel) in last 6 months	242
Used breath freshener in last 6 mo: spray/drops	210
Smoked 2+ cigars in last 7 days	196
Spent \$150+ at barber shops in last 6 months	182
Vitamin/dietary suppl used/6 mo: Centrum	176

Health/Beauty- Bottom	Index
Used prescription drug for heartburn/acid reflux	54
Visited nurse practitioner in last 12 months	54
Filled prescription last 12 mo: supermarket	49
Wear bi-focals	46
Filled prescription last 12 mo: discont/dept store	43

Region

Grocery/Alcohol- Top	Index
Shopped at grocery store/6 mo: Ralphs	234
Shopped at grocery store/6 mo: Vons	233
Shopped at grocery store/6 mo: Trader Joe`s	230
Shopped at grocery store/6 mo: Whole Foods Market	221
Shopped at grocery store/6 mo: Stop & Shop	214

Health/Beauty- Bottom	Index
Used prescription drug for heartburn/acid reflux	61
Used prescr drug for rheumatoid arthritis	59
Smoked 9+ packs of cigarettes in last 7 days	57
Smoked non-menthol cigarettes in last 12 months	50
Filled prescription last 12 mo: discont/dept store	48

Profile: Richmond and Region

Home/Garden/Lawn: The U.S. average sits at 100

Richmond

Home/Garden/Lawn- Top	Index
Used professional HH cleaning service in last 12 mo	154
HH owns walk behind lawn mower (electric)	108
Bought yard fence in last 12 months	88
HH used srv for property/garden maint last 12 mo	87
HH used professional carpet cleaning service/12 mo	84

Home/Garden/Lawn- Bottom	Index
HH owns stationary table saw	39
HH owns chain saw (gas)	34
HH owns garden tiller	25
HH owns lawn or garden tractor	20
HH owns riding lawn mower	18

Region

Home/Garden/Lawn- Top	Index
Used professional HH cleaning service in last 12 mo	224
Used housekeeper/maid in last 12 months	222
Used housekeeper/maid/prof HH cleaning service/12 mo	199
HH used srv for property/garden maint last 12 mo	183
HH spent on property/garden maintenance: \$500+	167

Home/Garden/Lawn- Bottom	Index
HH owns chain saw (gas)	47
HH owns welder	45
HH owns garden tiller	36
HH owns lawn or garden tractor	33
HH owns riding lawn mower	28

Profile: Richmond and Region

Leisure Activities/Lifestyle: The U.S. average sits at 100

Richmond

Leisure Activities/Lifestyle- Top	Index
Movie genre seen at theater/6 mo: horror	196
Gambled in Atlantic City in last 12 months	172
Gambled in Las Vegas in last 12 months	172
Bought lottery ticket in last 12 mo: Daily Drawing	147
Movie genre seen at theater/6 mo: family	139

Leisure Activities/Lifestyle- Bottom	Index
Did woodworking in last 12 months	53
Did birdwatching in last 12 months	51
Member of veterans club	49
Attended country music performance in last 12 mo	46
HH owns ATV/UTV	25

Region

Leisure Activities/Lifestyle- Top	Index
Gambled in Atlantic City in last 12 months	507
Rented movie/oth video/30 days: foreign	319
Gambled in Las Vegas in last 12 months	261
Went to art gallery in last 12 months	259
Attended classical music/opera performance/12 mo	254

Leisure Activities/Lifestyle- Bottom	Index
Purchased DVDs in last 30 days: 3+	72
Bought lottery ticket in last 12 mo: Powerball	72
Did woodworking in last 12 months	69
Attended country music performance in last 12 mo	66
HH owns ATV/UTV	30

Profile: Richmond and Region

Listen: The U.S. average sits at 100

Richmond

Listen- Top	Index
Radio format listen to: Hispanic	1,192
Listened to/purch last 6 mo: Spanish/Latin music	444
Radio format listen to: rhythmic	336
Radio format listen to: urban	265
Radio format listen to: all news	231

Listen- Bottom	Index
Radio format listen to: classic hits	61
Household subscribes to SiriusXM satellite radio	59
Listened to/purch last 6 mo: contemporary Christian	58
Listened to/purch last 6 mo: country music	53
Radio format listen to: country	31

Region

Listen- Top	Index
Radio format listen to: all news	506
Radio format listen to: Hispanic	407
Radio format listen to: classical	311
Radio format listen to: public	303
Listened to/purch last 6 mo: indie	264

Listen- Bottom	Index
Listened to/purch last 6 mo: country music	67
Radio format listen to: classic hits	60
Listened to/purch last 6 mo: gospel music	60
Radio format listen to: gospel	42
Radio format listen to: country	32

Profile: Richmond and Region

Read: The U.S. average sits at 100

Richmond

Read- Top	Index
Read any Spanish lang magazine (hard copy)/6 mo	668
Read magazine (hard copy)/6 mo: bridal	178
Read magazine (hard copy)/6 mo: video games	165
Read magazine (hard copy)/6 mo: baby	153
Read magazine (hard copy)/6 mo: parenthood	147

Read- Bottom	Index
Read magazine (hard copy)/6 mo: home service	61
Read newspaper: advertisements	59
Read newspaper: circulars/inserts/fliers	57
Read newspaper: classified section	55
Read magazine (hard copy)/6 mo: fishing/hunting	43

Region

Read- Top	Index
Visited website in last 30 days: nytimes.com	477
Visited website in last 30 days: wsj.com	311
Read any Spanish lang magazine (hard copy)/6 mo	286
Read magazine (hard copy)/6 mo: airline	264
Read magazine (hard copy)/6 mo: travel	226

Read- Bottom	Index
Read newspaper: circulars/inserts/fliers	78
Read magazine (hard copy)/6 mo: motorcycle	76
Read newspaper: advertisements	74
Read newspaper: classified section	47
Read magazine (hard copy)/6 mo: fishing/hunting	36

Profile: Richmond and Region

Watch: The U.S. average sits at 100

Richmond

Watch- Top	Index
Viewed any program on Spanish TV network last week	965
Watched last week: Music Choice	407
Watched last week: BET (Black Entertainment TV)	303
Watched last week: TV One	293
Watched last week: Fuse	287

Watch- Bottom	Index
Watched last week: Hallmark Channel	63
HH has satellite dish	56
HH has satellite dish: Dish Network	43
Watched last week: Outdoor Channel	32
Watched last week: CMT (Country Music Television)	30

Region

Watch- Top	Index
HH subscribes to fiber optic	355
Viewed any program on Spanish TV network last week	346
Viewed TV show (video-on-demand) in last 30 days	196
Watched last week: IFC (Independent Film Channel)	182
Viewed any program (video-on-demand) last 30 days	178

Watch- Bottom	Index
HH has satellite dish	49
Watched last week: WGN America	48
HH has satellite dish: Dish Network	35
Watched last week: CMT (Country Music Television)	29
Watched last week: Outdoor Channel	24

Profile: Richmond and Region

Pet Products: The U.S. average sits at 100

Richmond

Pet Products- Top	Index
HH purch pet food last 12 mo: from PETCO	117
HH used 8+ containers of cat food in last 7 days	98
HH purch pet food from pet specialty store/12 mo	91
HH used 7+ containers of dog food in last 7 days	91
HH used <3 containers of dog food in last 7 days	90

Pet Products- Bottom	Index
HH used 25+ pounds pkgd dry dog food last 30 days	49
HH used 21+ pounds of cat litter in last 30 days	49
HH used 9+ pounds pkgd dry cat food last 30 days	48
HH purch pet food last 12 mo: from discount store	46
HH purch flea control prod from vet last 12 months	45

Region

Pet Products- Top	Index
HH purch pet food last 12 mo: from PETCO	151
HH purch pet food from pet specialty store/12 mo	123
HH used 8+ containers of cat food in last 7 days	117
HH purch pet food last 12 mo: from PetSmart	112
HH purch pet food last 12 mo: from vet	100

Pet Products	Index
HH purch pet food last 12 mo: from grocery store	61
HH used 25+ pounds pkgd dry dog food last 30 days	55
HH used 9+ pounds pkgd dry cat food last 30 days	55
HH owns 2+ dogs	50
HH purch pet food last 12 mo: from discount store	47

Profile: Richmond and Region

Restaurants: The U.S. average sits at 100

Richmond

Restaurants- Top	Index
Fast food/drive-in last 6 mo: Carl's Jr.	450
Fast food/drive-in last 6 mo: Del Taco	441
Fast food/drive-in last 6 mo: Jack in the Box	275
Fast food/drive-in last 6 mo: Church's Fr. Chicken	251
Fast food/drive-in last 6 mo: Chuck E. Cheese's	228

Restaurants- Bottom	Index
Fast food/drive-in last 6 mo: Long John Silver's	41
Fast food/drive-in last 6 mo: Arby's	39
Fast food/drive-in last 6 mo: Steak 'n Shake	39
Fam rest/steak hse/6 mo: Cracker Barrel	39
Fast food/drive-in last 6 mo: Hardee's	29

Region

Restaurants- Top	Index
Fam rest/steak hse/6 mo: California Pizza Kitchen	470
Spent at fine dining rest in last 6 mo: \$201+	393
Fast food/drive-in last 6 mo: Carl's Jr.	340
Fast food/drive-in last 6 mo: Del Taco	315
Went to fine dining restaurant 3+ times last month	312

Restaurants- Bottom	Index
Fast food/drive-in last 6 mo: Arby's	38
Fast food/drive-in last 6 mo: Captain D's	38
Fam rest/steak hse/6 mo: Logan's Roadhouse	35
Fast food/drive-in last 6 mo: Hardee's	26
Fast food/drive-in last 6 mo: Long John Silver's	26

Profile: Richmond and Region

Shopping: The U.S. average sits at 100

Richmond

Shopping- Top	Index
Dept/cloth/shoe/spec store/3 mo: Foot Locker	360
Dept/cloth/shoe/spec store/3 mo: The Disney Store	314
Shopped at AMPM in last 6 months	264
Dept/cloth/shoe/spec store/3 mo: H&M	247
Dept/cloth/shoe/spec store/3 mo: Forever 21	241

Shopping- Bottom	Index
Spent at convenience store in last 30 days: \$100+	58
Bought at convenience store/30 days: gas	56
Shopped at SuperAmerica/Speedway in last 6 months	52
Drug store shopped at last 6 mo: Walmart Pharmacy	49
Shopped at BP Food Mart in last 6 months	41

Region

Shopping- Top	Index
Dept/cloth/shoe/spec store/3 mo: Nordstrom	451
Dept/cloth/shoe/spec store/3 mo: H&M	393
Dept/cloth/shoe/spec store/3 mo: Banana Republic	371
Dept/cloth/shoe/spec store/3 mo: Sports Authority	288
Ordered from website last 12 mo: zappos.com	282

Shopping- Bottom	Index
Bought at convenience store/30 days: gas	47
Bought at convenience store/30 days: cigarettes	45
Shopped at SuperAmerica/Speedway in last 6 months	44
Shopped at BP Food Mart in last 6 months	41
Drug store shopped at last 6 mo: Walmart Pharmacy	36

Profile: Richmond and Region

Sports: The U.S. average sits at 100

Richmond

Sports- Top	Index
Watch on TV: soccer (MLS)	212
Watch on TV: boxing	198
Attend sports events: basketball game-NBA regseas	176
Participated in soccer in last 12 months	173
Watch on TV: soccer (World Cup)	162

Sports- Bottom	Index
Watch on TV: bull riding (pro)	40
Participated in boating (power) in last 12 months	39
Participated in fishing (fresh water) in last 12 mo	36
Participated in hunting with shotgun in last 12 mo	31
Participated in hunting with rifle in last 12 mo	24

Region

Sports- Top	Index
Participated in skiing (downhill) in last 12 months	279
Participated in yoga in last 12 months	226
Participated in tennis in last 12 months	208
Participated in jogging/running in last 12 months	189
Attend sports events: basketball game-NBA regseas	187

Sports- Bottom	Index
Participated in fishing (fresh water) in last 12 mo	46
Watch on TV: bull riding (pro)	40
Participated in archery in last 12 months	38
Participated in hunting with shotgun in last 12 mo	35
Participated in hunting with rifle in last 12 mo	26

Profile: Richmond and Region

Telephones: The U.S. average sits at 100

Richmond

Telephones- Top	Index
Service on cell phone use most often: MetroPCS	885
Service on cell phone use most often: T-Mobile	249
Have a working cell phone: T-Mobile	247
HH made phone call to foreign country last 30 days	200
Made a collect call in the last 6 months	197

Telephones- Bottom	Index
Used Yellow Pages/12 mo: auto repair/services	53
Used Yellow Pages/12 mo: beauty salons	50
Used Yellow Pages/12 mo: auto parts/supplies	49
Used Yellow Pages/12 mo: pharmacies	47
Used Yellow Pages/12 mo: doctors/dentists/other med service	46

Region

Telephones- Top	Index
HH made phone call to foreign country last 30 days	328
Service on cell phone use most often: MetroPCS	295
Have a working cell phone: iPhone	228
Service on cell phone use most often: T-Mobile	196
Have a working cell phone: BlackBerry	179

Telephones- Bottom	Index
Used Yellow Pages/12 mo: banking/finance/insurance	51
Used Yellow Pages/12 mo: department stores	50
Used Yellow Pages/12 mo: doctors/dentists/other med service	49
Used Yellow Pages/12 mo: pharmacies	46
Used Yellow Pages/12 mo: auto parts/supplies	44

Profile: Richmond and Region

Travel: The U.S. average sits at 100

Richmond

Travel- Top	Index
Foreign travel/3 yrs: used airline-specific site	146
Airline used on foreign trip/3 yrs: Continental	138
Airline used on foreign trip/3 yrs: American	138
Spent on foreign vacations last 12 mo: \$1000-\$2999	136
Visited on foreign trip last 3 yrs: Mexico	131

Travel- Bottom	Index
Took 3+ domestic non-business trips in last 12 mo	63
Stayed in hotel last 12 mo: Holiday Inn	63
Visited on domestic trip last 12 mo: South	57
Stayed in hotel last 12 mo: Hampton Inn	51
Visited on domestic trip last 12 mo: North Central	49

Region

Travel- Top	Index
Took 3+ foreign trips by plane in last 3 yrs	481
Airline used on foreign trip/3 yrs: United	417
Airline used on domestic trip/12 mo: United	395
Visited travel website/30 days: tripadvisor.com	385
Took 3+ foreign non-business trips in last 3 yrs	375

Travel- Bottom	Index
Stayed in hotel last 12 mo: Comfort Inn	94
Nights spent in hotel/motel in last 12 mo: 1	92
Stayed in hotel last 12 mo: Holiday Inn Express	91
Stayed in hotel last 12 mo: Days Inn	79
Visited on domestic trip last 12 mo: North Central	79

ONLINE BRAND MONITORING STUDY

Purpose

Over the years, brands (of products, of companies, of communities) have transformed from something that identified products to something people identified with. The evolution of technology, especially search engines, blogs, and social media has enabled widespread conversations to take place about brands in online consumer communities. Understanding how these online conversations contribute to reputation is just as important as understanding in-person conversations taking place between consumers.

The purpose of the Online Brand Monitoring Study is to gain understanding of the online reputation (“conversations,” or content generated and consumed by people) centered around Richmond on social media platforms. The Online Brand Monitoring Study reveals where online conversations are taking place, the authors of such content, top keywords used online, and overall sentiment of the community and assets within the community. In the online space, consumer behavior is content, either created or consumed. Therefore understanding online content (i.e. conversations) about a brand allows us to understand consumer behavior around that brand, at least the consumer behavior that is occurring online. And because technology’s evolution has led to new channels, networks, platforms and applications, it has also created an equal amount of new opportunities for understanding and engaging with consumers.

Methodology & Results

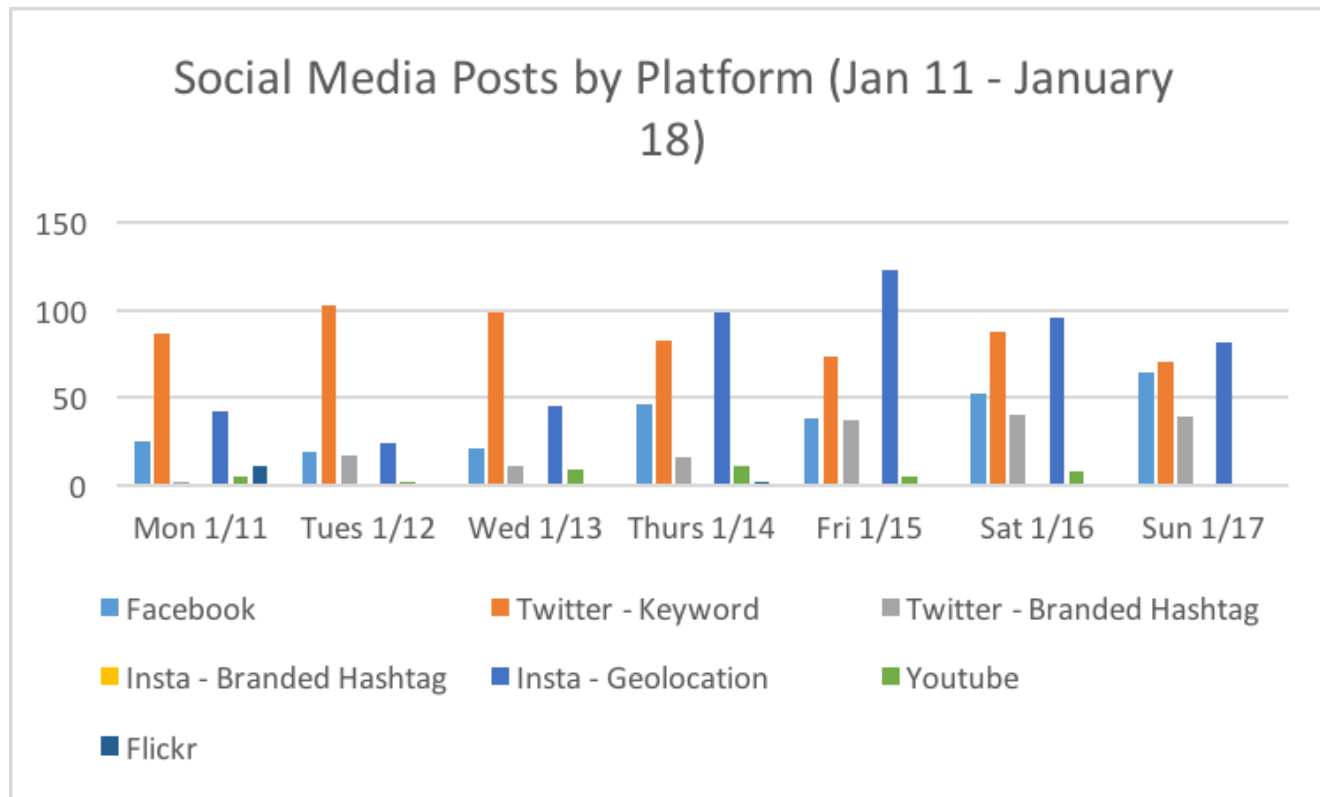
Leveraging methods that combine the analytical power of online measurement and monitoring tools, the Online Brand Monitoring Study examines social media content from a specific date and time (January 11 – January 18 2016). By examining social media platforms (Twitter, Instagram, Facebook, Flickr, YouTube) the Online Brand Monitoring Study identifies authors, online influencers, and the content being generated around Richmond. The first portion of the study involves recorded areas over a course of time, while the second portion involves real time searches logged weekly to obtain “snapshots” of the area. Average posts, sentiments, and themes were noted for this study.

Online Brand Monitoring

- Instagram is the most heavily used platform by *community residents*, and also the most conversational platform.
- Twitter is the most heavily used platform overall – but many active accounts on Twitter mentioning Richmond California are for job ads and news.
- Many photos include people, but an unusually large amount of posts featured “things” without people. Photo composition was a featured and posts tended to focus more on artistic self expression than “social gatherings”.
- Many posts across all platforms, users and residents mentioned Richmond, used #richmondCA, checked into Richmond or talked about Richmond. There is much hometown pride and community pride that comes through via social media conversation.

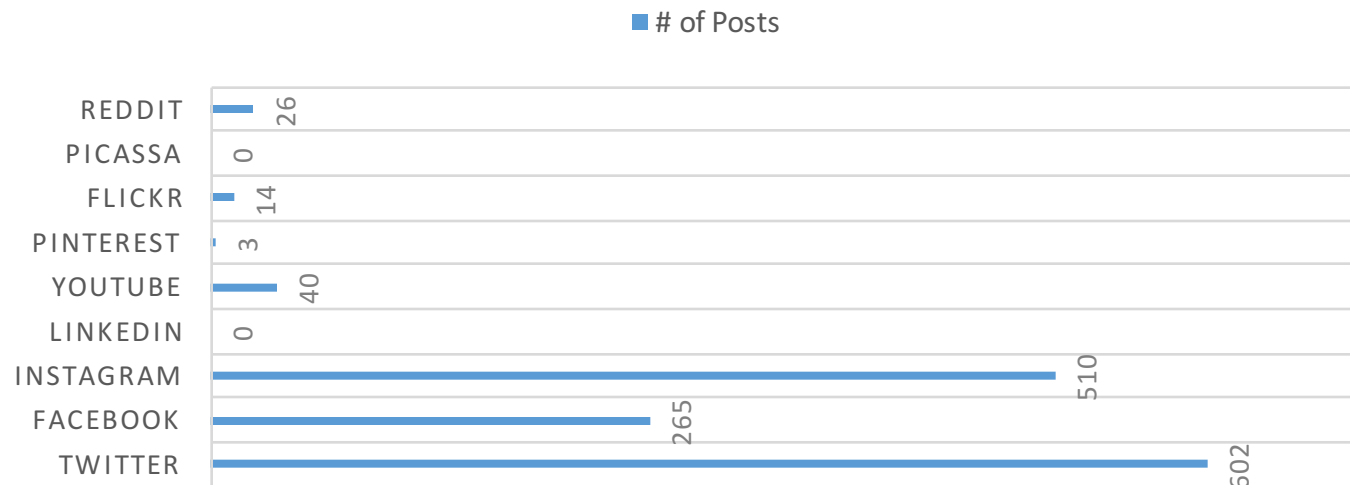
Online Brand Monitoring

Data on branded **KEYWORDS**, **HASHTAGS**, and **GEOTAGGED POSTS** was collected every day, January 11 through January 18. This is the breakdown of posts featuring or mentioning Richmond, CA by platform over the course of one week.



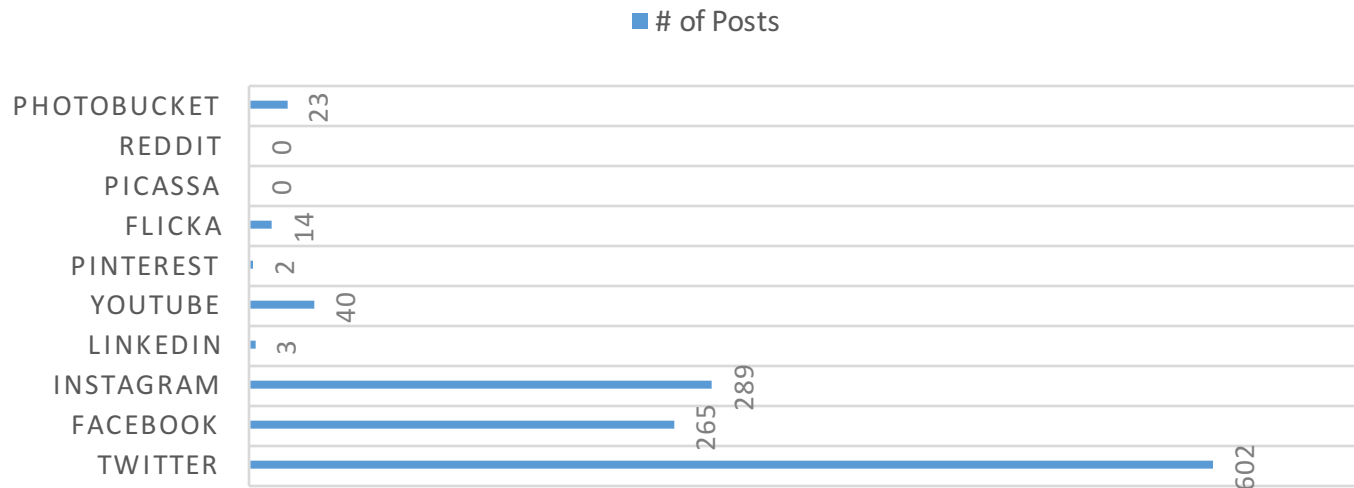
Online Brand Monitoring

Data on branded **KEYWORDS**, **HASHTAGS**, and **GEOTAGGED POSTS** was collected every day, January 11 through January 18 then **totaled** to show an approximation in the number of posts featuring or mentioning Richmond, CA over the course of one week.



Online Brand Monitoring

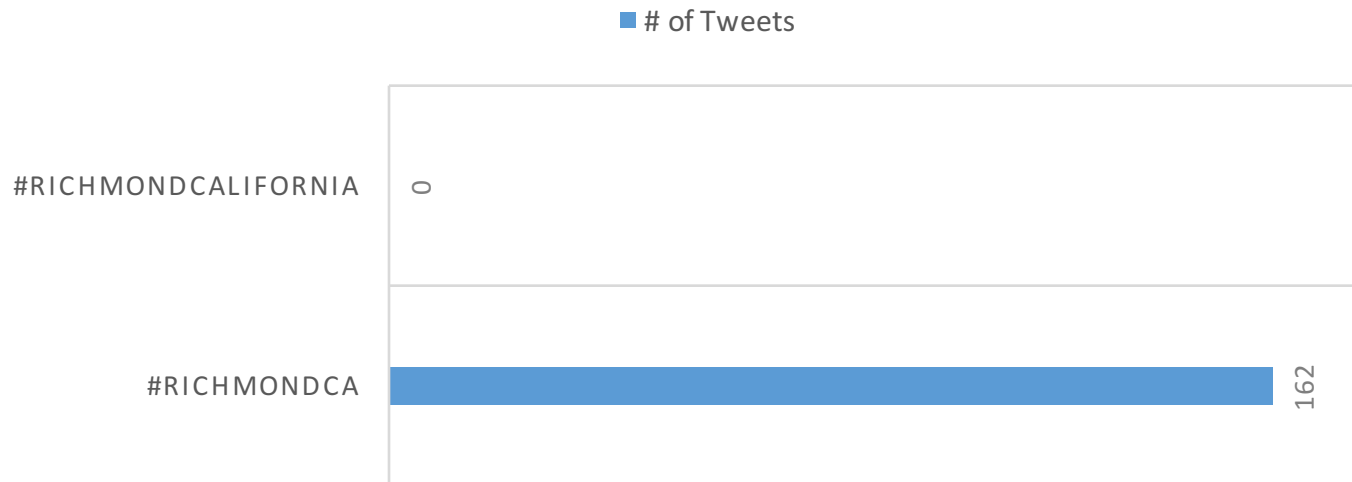
Data on branded KEYWORDS (Richmond, CA and Richmond, California) were monitored over the course of 7 days (January 11 – January 18) on major social media networks:



Source: Keyhole.com

Online Brand Monitoring: Twitter Hashtags

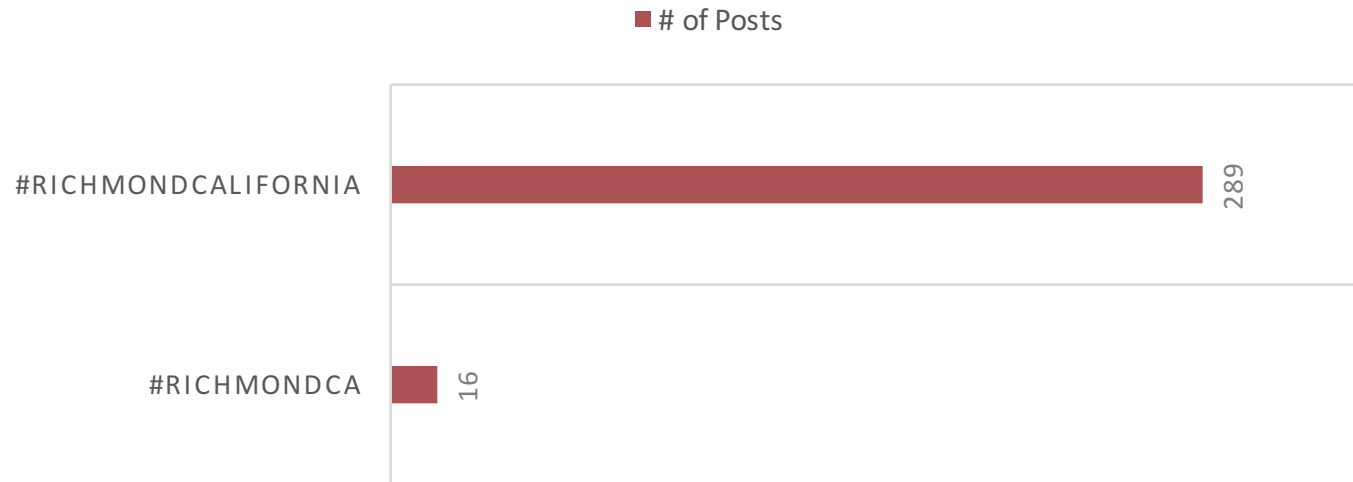
Data on **BRANDED HASHTAGS** (On Twitter specifically) was monitored over the course of 7 days (January 11 – January 18):



Source: Twitter.com

Online Brand Monitoring: Instagram Hashtags

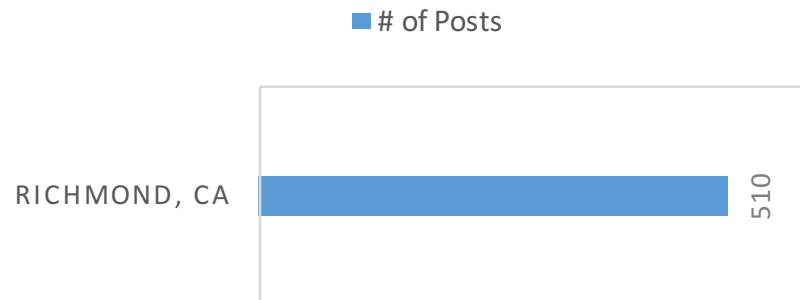
Data on **BRANDED HASHTAGS VOLUME** (on Instagram specifically) was monitored over the course of 7 days (January 11 – January 18):



Source: Iconosquare.com

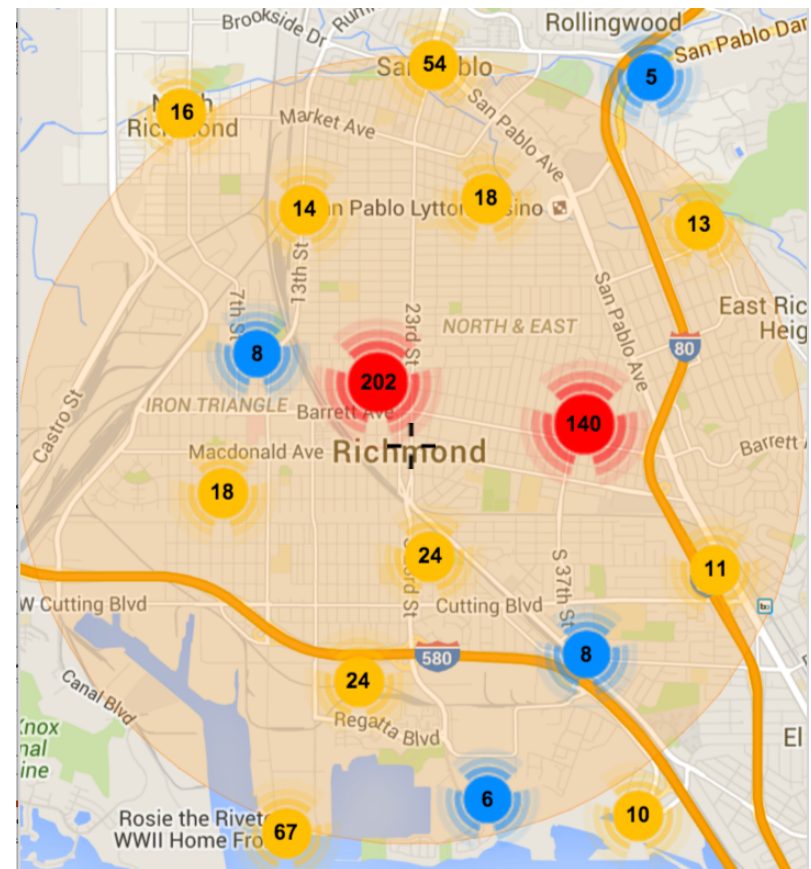
Online Brand Monitoring: Instagram Geolocation

Data on GEOGRAPHICALLY TAGGED PHOTOS FROM RICHMOND, CA +5 mile radius (on Instagram specifically) was monitored over the course of 7 days (January 11– January 18):



**These post originate from Richmond, CA but may or may not include Richmond, CA branding.*

Source: Gramfeed.com



Area Analytics

Online data was monitored from January 11– January 18, 2016. Activity from the following Social Media platforms was recorded:

- Twitter
- Instagram
- Facebook
- Flickr
- YouTube
- Picasa

Key Content Themes

Summary

- The top topics themes occurred across all of the major platforms. Facebook had more news, Twitter more job openings and Instagram more lifestyle content, but there were posts about each of the following top themes across *all* platforms.
- The exception to the top content themes is YouTube – which is primarily used by a local car business to sell cars and aspiring musicians.
- There were few identifiable themes within the data set.
- From the data that was collected there were very small differences in the popular themes. Aside from “nature”, the remaining themes were no more or less popular than each other – there were very small margins between the number of photos from each theme.
- #RichmondCA is a popular hashtag – many residents “check in”, “hashtag” or note that they are in Richmond while posting (which is not frequent in many communities.) Richmond, CA has a lot of hometown pride.
- The most popular themes included food and drink, art, history, nature and worship.
- Posting in the evening may be the most effective based on community activity.

Key Content Themes

Top Themes In Richmond, CA – News & Jobs

Observations

- Many of the posts specifically on Facebook and Twitter that mentioned Richmond, CA by hashtag or keyword were related to news and job openings



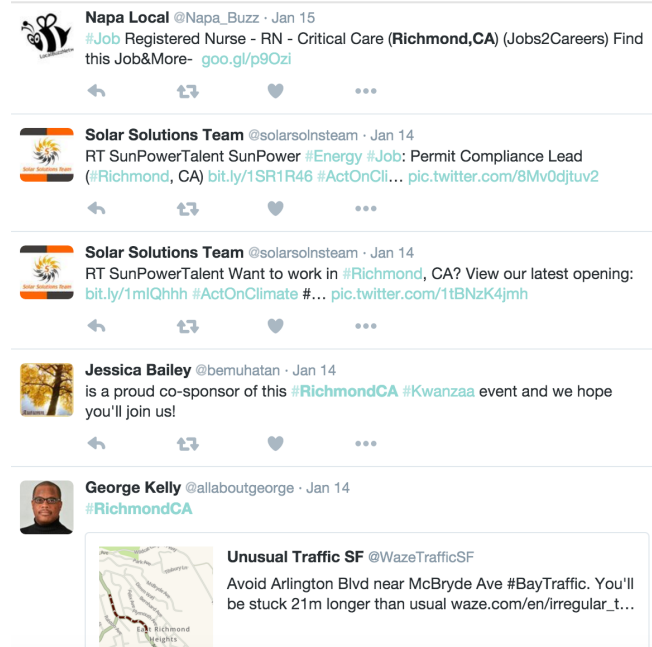
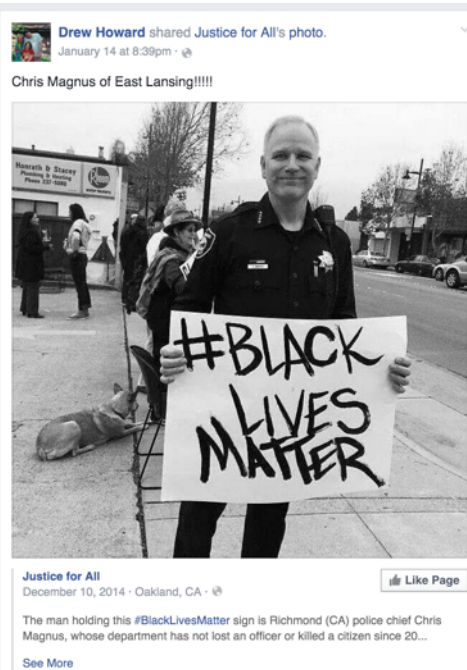
Blue Apron ,Richmond , CA ma 400 Full Time job mageko xa
www.blueapron.com/Cali-hire
 Search garer apply garau
 California sanfransisco basi sabai Nepali haru Ko jankari Ko share gara
 sabai lai jankari garau....



Blue Apron: Fresh Ingredients, Original Recipes, Delivered to You

Blue Apron makes cooking fun and easy. We'll provide you with all the ingredients that you need to make a delicious meal in exactly the right proportions.

WWW.BLUEAPRON.COM

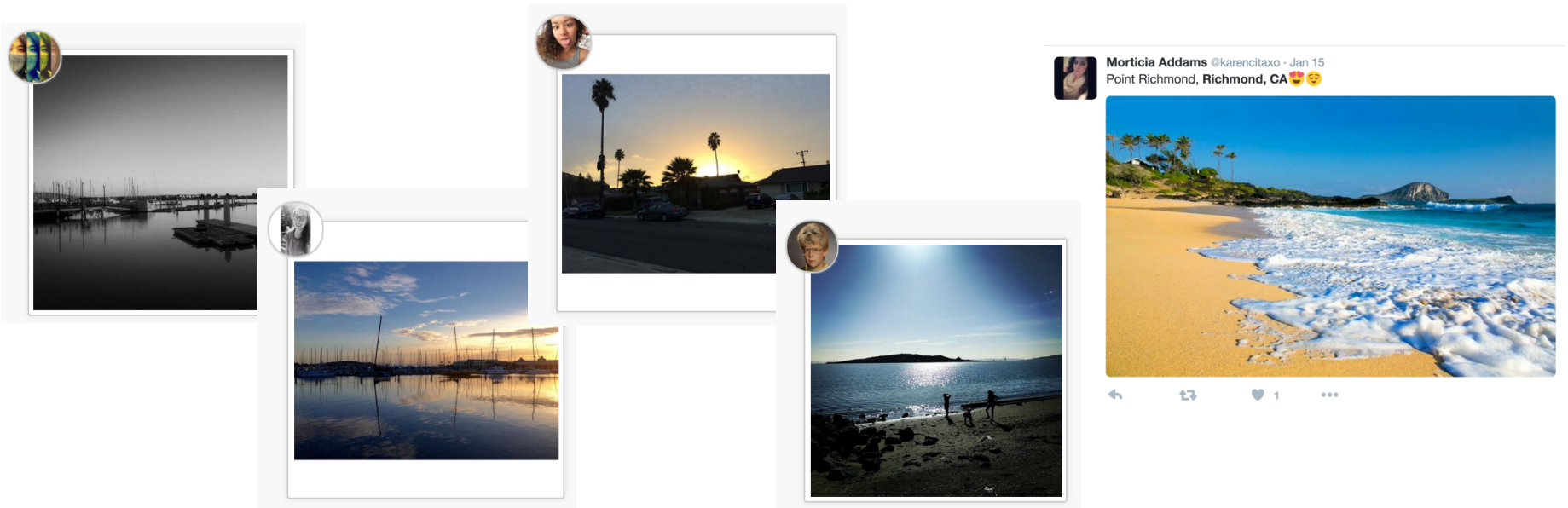


Key Content Themes

Top Themes In Richmond, CA– Nature

Observations

- Nature is one of the most talked about topics in Richmond, CA
- Sunrises and sunsets were very popular with users
- Popular points of interest include the Richmond Marina Bay Harbor Trail, Marina Bay Yacht Harbor and Point Richmond beaches

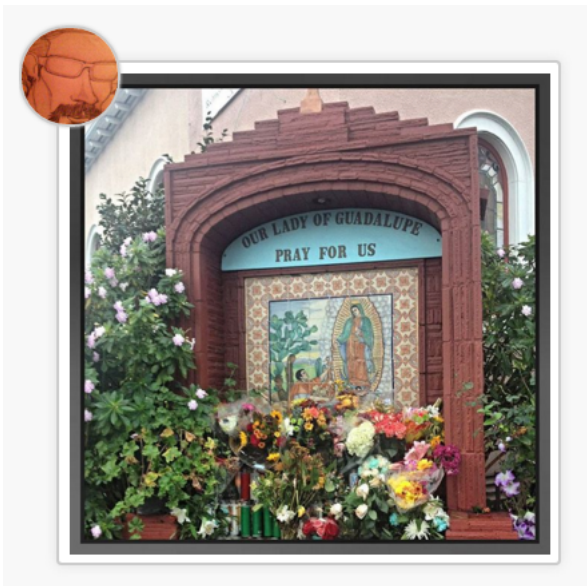


Key Content Themes

Top Themes In Richmond, CA – Worship

Observations

- Although mostly occurring on the weekends, there was a high volume of posts across the three major platforms (Facebook, Twitter and Instagram) focused on worship and religion
- Most of the photos included people, but a few also captured places of worship such as Our Lady of Guadalupe

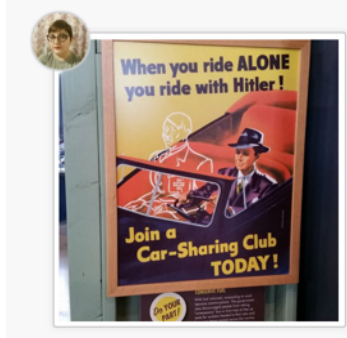
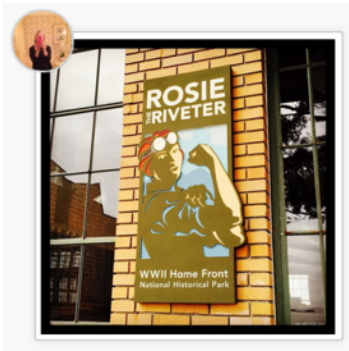


Key Content Themes

Top Themes In Richmond, CA – History

Observations

- History was a really popular topic and photo subject in Richmond, CA across all major platforms.
- Rosie the Riveter WWII Homefront National Historic Park and expos at The Craneway Pavilion were among the top mentioned locations in Richmond.

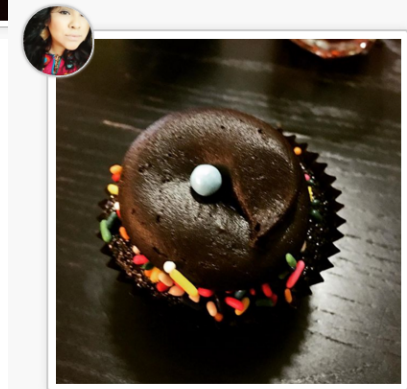
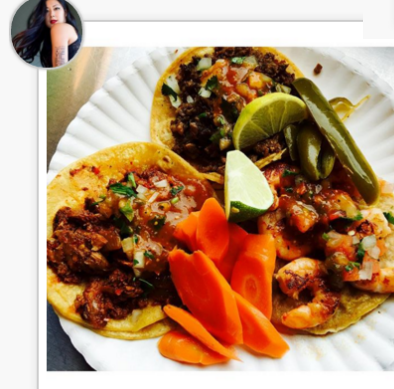
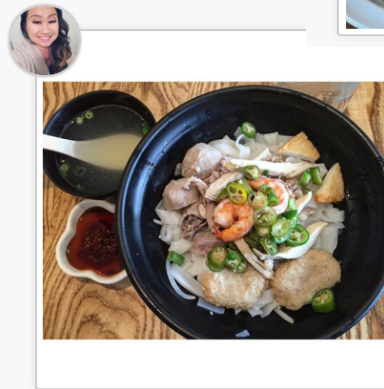
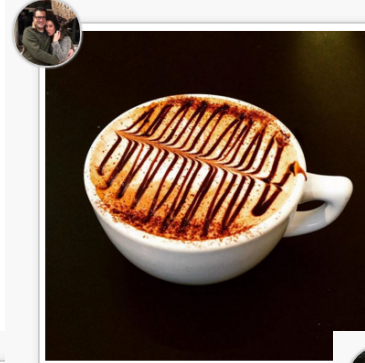
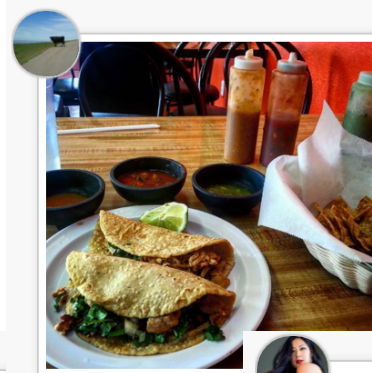
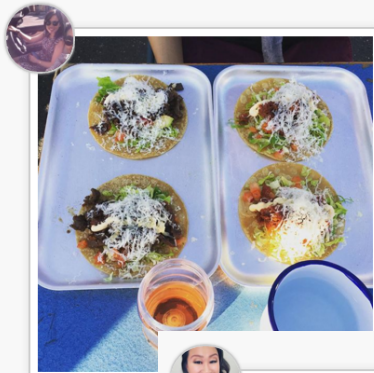


Key Content Themes

Top Themes In Richmond, CA– Food

Observations

- Like many communities food was a really popular topic; however there was much competition with restaurants in nearby San Pablo.
- Top food cuisines included tacos, coffee, baked goods and Asian/Thai food.

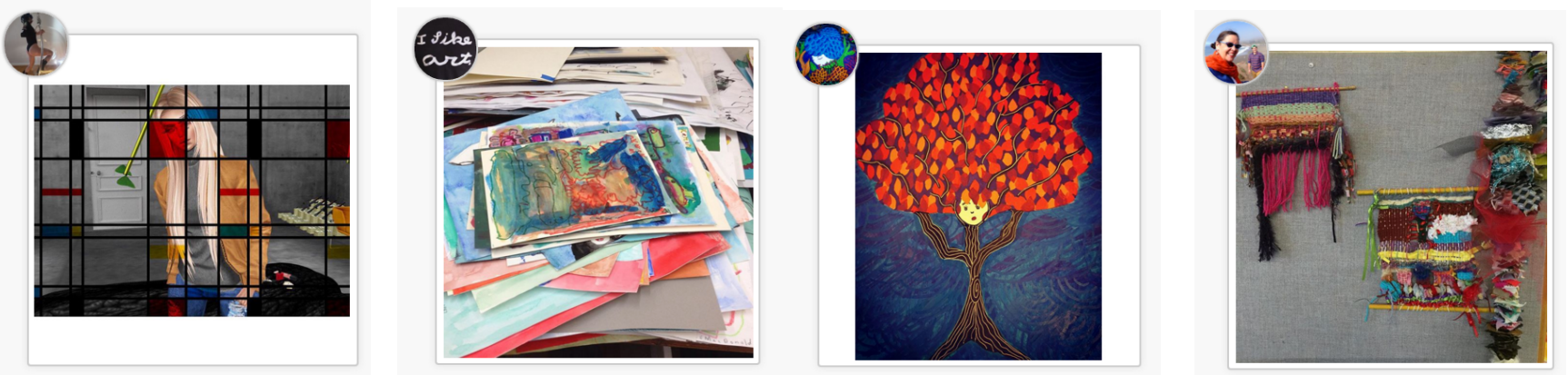


Key Content Themes

Top Themes In Richmond, CA – Art

Observations

- Art was a very popular theme in Richmond. Personal art, street art, art museums, historic art, drawings, doodling and music were among the top posts coming out of Richmond, CA
- Among the top art related destinations was NIAD Art Center



TOP BUSINESS PROSPECTS

Purpose

The Top Business Prospects Study identifies businesses and organizations that are most similar to the various industries present in Richmond and in comparable communities from across the U.S. This list of entities can be used to assist economic development professionals and city leadership in the area to actively recruit these or similar companies to Richmond.

Methodology & Results

Using data gathered by the Environmental Systems Research Institute, Inc. (ESRI), North Star gathered a list of the top North American Industry Classification System (NAICS) codes that are most present in Richmond's economic landscape. North Star combines Richmond's top NAICS codes and the City's workforce characteristics (using Resident Tapestry data, explored earlier in this report) to define a list of top prospects that best match Richmond's top industries and workforce strengths. North Star examines other national cities with similar Tapestry profiles to identify businesses that could potentially succeed in Richmond. Additionally, a target radius around Richmond is identified to keep the prospect list as targeted as possible. An Excel version of your list is attached in **Appendix E** on the Final Report CD.

NOTE: The Top Business Prospects list is meant to serve as a targeted example of the types of businesses and organizations that best fit Richmond's economic strengths. This list can most effectively be used by identifying the types of companies included and targeting similar organizations through EDC efforts. For additional information and a full description of NAICS codes, see: <http://www.census.gov/eos/www/naics/>.

COMPETITIVE ANALYSIS

Purpose

To better understand what Richmond's competition is currently offering.

Methodology & Results

North Star reviewed each of the following city's communication materials to compile a short synopsis of their attributes. The materials reviewed include but are not limited to the City's website, the CVB website, economic development websites and downtown websites, as well as other communication materials such as brochures and visitors guides.

- Berkeley, CA
- Oakland, CA
- El Cerrito, CA
- Hercules, CA
- San Rafael, CA
- Emeryville, CA

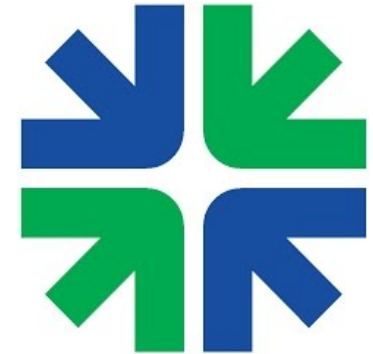
COMMUNITY-WIDE VISUALS

From the Situation Analysis & Research



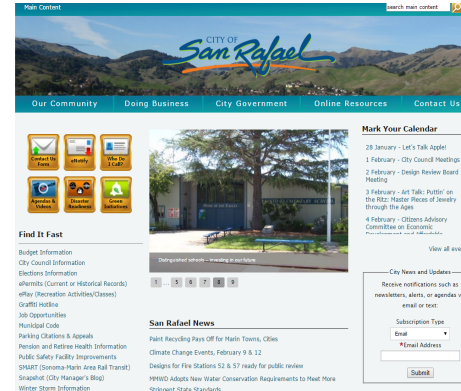
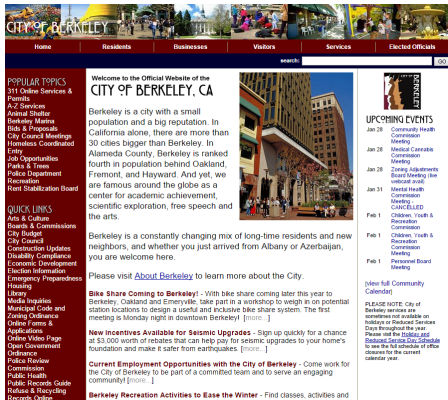
COMMUNITY-WIDE VISUALS

From the Situation Analysis & Research



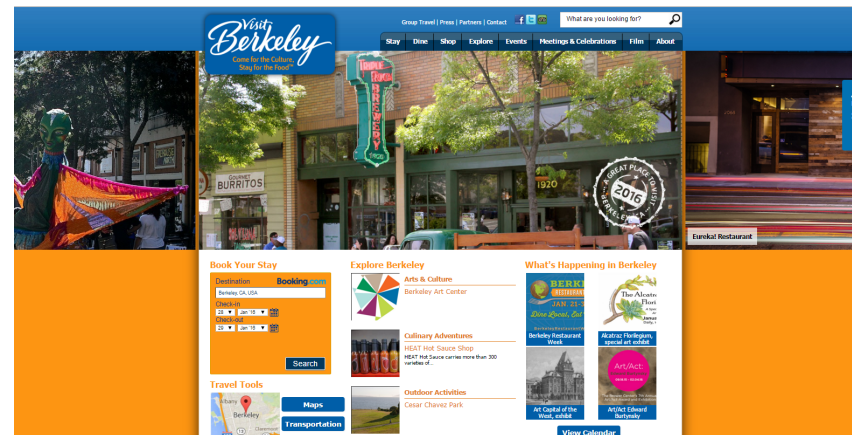
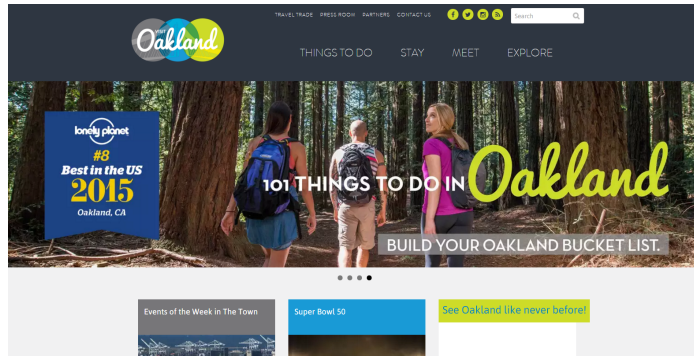
COMMUNITY-WIDE VISUALS

From the Situation Analysis & Research



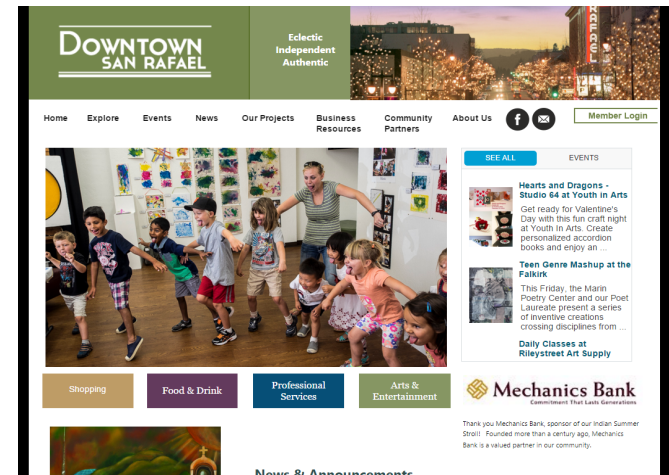
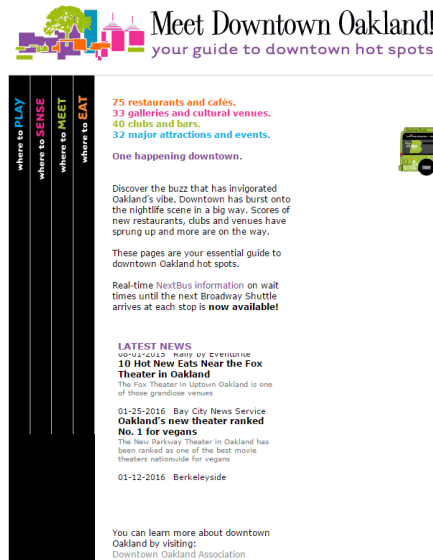
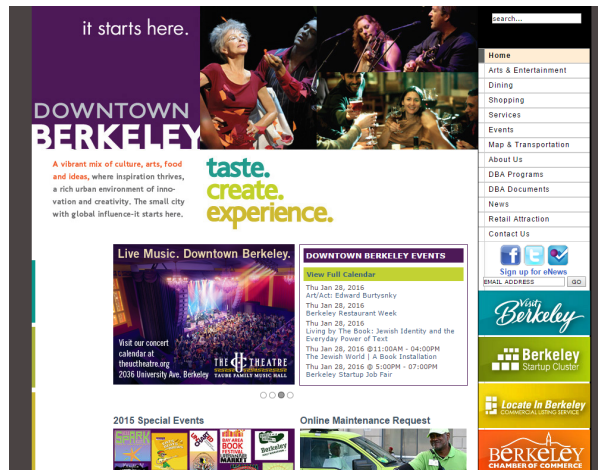
COMMUNITY-WIDE VISUALS

From the Situation Analysis & Research



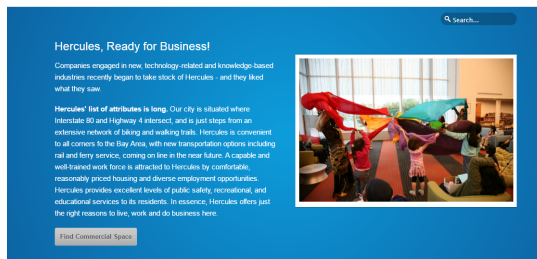
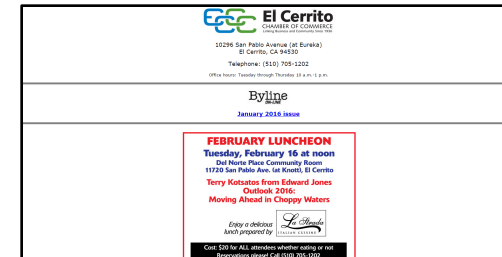
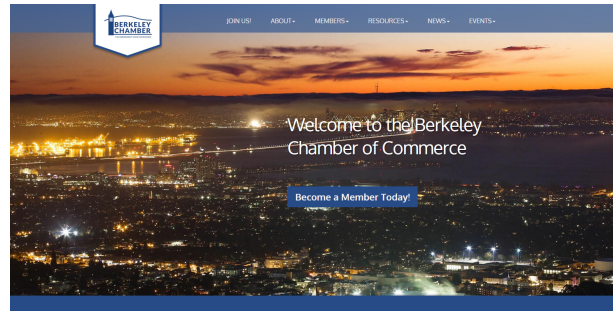
COMMUNITY-WIDE VISUALS

From the Situation Analysis & Research



COMMUNITY-WIDE VISUALS

From the Situation Analysis & Research



San Rafael Chamber



IDENTIFIED COMPETITORS

Berkeley, California

Slogans and Logos



Positioning Lines:

- CVB: Come for the Culture, Stay for the Food
- Downtown: It starts here
- Chamber: The independent voice for business
- Reputation (based on NS Research)
 - Internal: *University, Hippies, Educated, Progressive, Quirky*
 - External: *University, Hippies, Progressive, Forward Thinking*

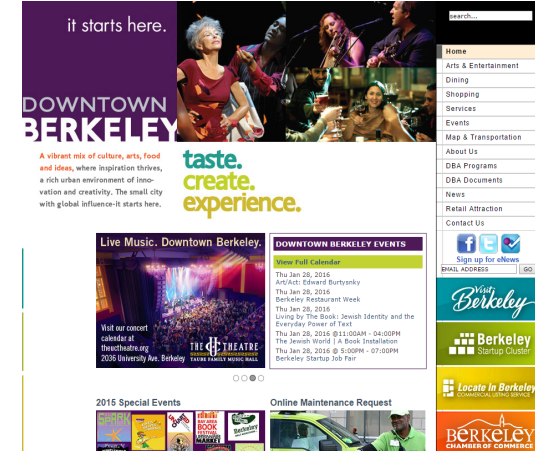
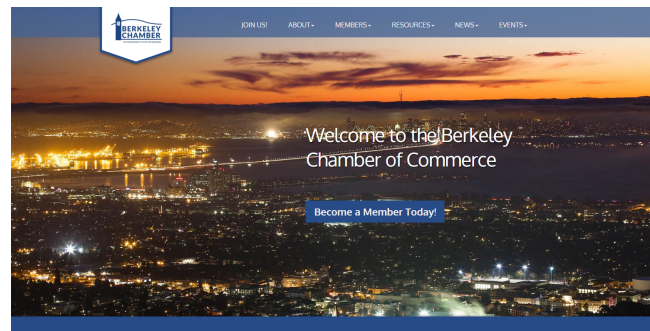
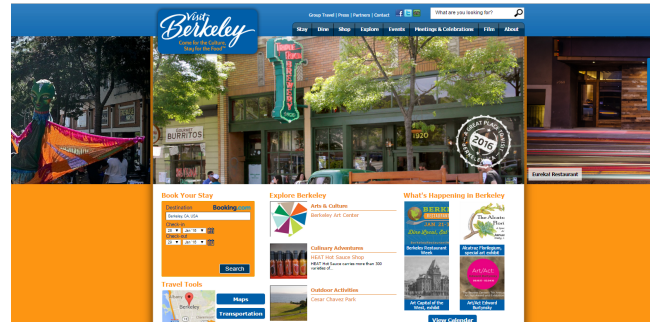
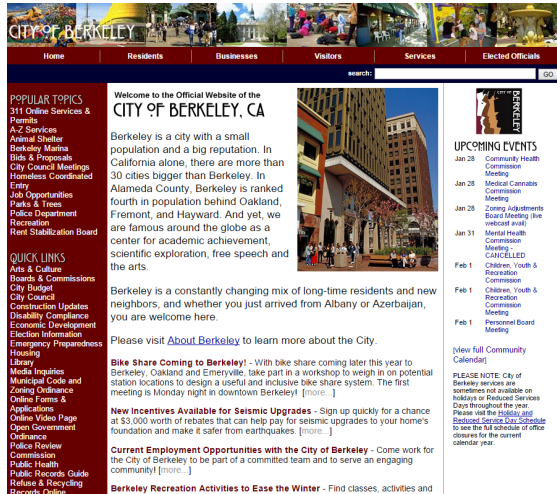
Observations:

- Messaging: Most groups tout the recognized academic setting and the culture that it attracts but it is broadly considered and relies on implication. Sites are either copy-heavy or devoid of copy. No middle ground. Several missed opportunities. The downtown group advances this idea (website) of culture and dining most succinctly despite a generic line.
- Design Cohesion: Berkeley's city logo suggests diversity and some language on its website reflects this. But other elements, like an art deco typeface, seems disjointed. The CVB highlights culture and food which is often an output of diversity but its aesthetic is design driven (focused on landscape photography rather than diverse people in those settings). You have to get 5-6 photos deep in the photo bank for any food or culture. No cohesion between sites other than key attributes being promoted but done haphazardly and therefore less effective or impactful.
- Reputation Support: Academic setting is consistently promoted and the diversity it attracts. Progressive ideas sneak in some mentions. But promotion seems to discuss things in general without getting specific and therefore not being compelling for most.

IDENTIFIED COMPETITORS

Berkeley, California

Visual Branding



Overall Impressions:

- **Messaging:** Diversity and culture are hinted at across most sites but the messaging seems weak.
- **Design Cohesion:** No integration in design or color. Some language is similar or at least the subject matter of key themes.
- **Do They Have a Brand?** There are attempts at a brand focused on diversity and progressive ideas but imagery and design choices are straightforward and don't seem to demonstrate the diverse character or quirky nature that many associate with Berkeley. These attributes are particular interesting to visitor. The assets and themes are in place but suffer from a vague articulation.

IDENTIFIED COMPETITORS

Oakland, California

Straplines and Logos



Positioning Lines:

- Downtown: Meet Downtown Oakland! Your guide to downtown hot spots
- Reputation (based on NS Research)
 - Internal: *Crime, Growing/improving, Dangerous. Diverse, Struggling, Hip*
 - External: *Crime, Dangerous, Raiders, Jack London Square*

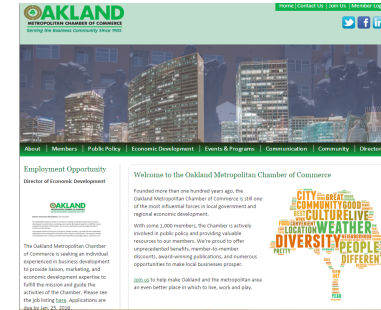
Observations:

- Messaging: There is not an organized message even within particular sites for Oakland. Sites are concerned about function and utility of presenting information. Language does not apply any branded theme or message. The city makes reference to the most diverse city in the US. But that diversity is not celebrated elsewhere in any demonstrative way.
- Design Cohesion: There is none.
- Reputation Support: Chamber of Commerce and economic development sites inherently promote a growing economy in a place. Here is no exception, But no Oakland site capitalizes on the hip, emerging vibe that many associate with Oakland.

IDENTIFIED COMPETITORS

Oakland, California

Visual Branding



Overall Impressions:

- **Messaging:** No organized messaging for any site much less a collective narrative among them.
- **Design Cohesion:** There is none.
- **Reputation Support:** Little attention is given to diversity or a hip vibe that was identified through research.
- **Do They Have a Brand?** There is no apparent brand message or integrated design aesthetic for the community of Oakland.



IDENTIFIED COMPETITORS

El Cerrito, California

Straplines and Logos



Positioning Lines:

- City: Providing innovative service for a sustainable future
- Chamber: Linking business and community since 1936
- Reputation (based on NS Research)
 - Internal: *Boring, Nice, Families, Safe, Shopping, Bedroom Community*
 - External: *BART station, Suburb, Bedroom Community, Hills*

Observations:

- Messaging: There is no tourism or economic development site. And the Chamber site is undeveloped and lacks content. So the only messaging is coming from the City site. The tagline is prominently featured but does not inform or inspire with any branded language. Primary navigation leads you to programming and resources for Green and sustainable practices. But “innovative” language is not extended to business development or city services.
- Design Cohesion: Design is singular considering that all content is on the city site. But there is no connective narrative through the city site.
- Reputation Support: There were no attributes highlighted in the research that would serve a strong brand. But there are missed opportunities in extending the tenets of a brand based on sustainability suggested in the tagline.

IDENTIFIED COMPETITORS

El Cerrito, California

Visual Branding



Overall Impressions:

- **Messaging:** Messaging is limited to the tagline.
- **Design Cohesion:** Only one site is presenting content about El Cerrito.
- **Reputation Support:** Reputation is as a boring bedroom community, a distinction around which a city would not brand.
- **Do They Have a Brand?** They have the seed idea for a brand but it is underdeveloped and under-promoted because the sustainability message is not being told often or loud enough to register with audiences.

IDENTIFIED COMPETITORS

Hercules, California

Straplines and Logos

Positioning Lines:

- City: The Dynamic City on the Bay
- Chamber: Hercules, Ready for Business!
- Reputation (based on NS Research)
 - Internal: *NA*
 - External: *Old, Historic, Far away, Oil refineries*



Observations:

- **Messaging:** There is no branded language associated with Hercules sites which are limited to the City and Chamber sites. The waterfront developer has a site promoting its interests. The City does not follow up its tagline claim with any depiction or narrative about what makes Hercules THE dynamic city on the Bay. Dynamic photography is not used. The tagline creates an expectation that is not fulfilled online.
- **Design Cohesion:** The City and Chamber sites share similar colors but are different enough that the similarities seem accidental.
- **Reputation Support:** Content talks about Hercules as an industrial city in the past, but that most evidence of that is gone. While sites discuss history, authenticity and historic structure do not take a lead in language or images.

IDENTIFIED COMPETITORS

Hercules, California

Visual Branding



Overall Impressions:

- **Messaging:** Imagery tells me that Hercules is a waterfront, park like setting, but there is no branded message. The tagline is not substantiated. And the Forbes rating as most livable suburb is not depicted or explained. Online viewers are not invited to learn why.
- **Design Cohesion:** Only in similar colors which does not seem deliberate.
- **Reputation Support:** The outside reputation is not confirmed other than that Hercules used to be an industrial city. The Phillips 66 refinery is apparent only as a sponsor.
- **Do They Have a Brand?** Not really. There are elements that hint at a charming, waterfront community conveniently located in the Bay but nor real distinction is communicated.

IDENTIFIED COMPETITORS

San Rafael, California

Straplines and Logos



Positioning Lines:

- City: Mission City of Marin (on city seal)
CVB: Just a little out there (Regional)
- Downtown: Eclectic, Independent, Authentic
- Reputation (based on NS Research)
 - Internal: *Beautiful, Upscale, Expensive, Marin County, Nice, White*
 - External: *Wealthy, Bridge, County seat*

Observations:

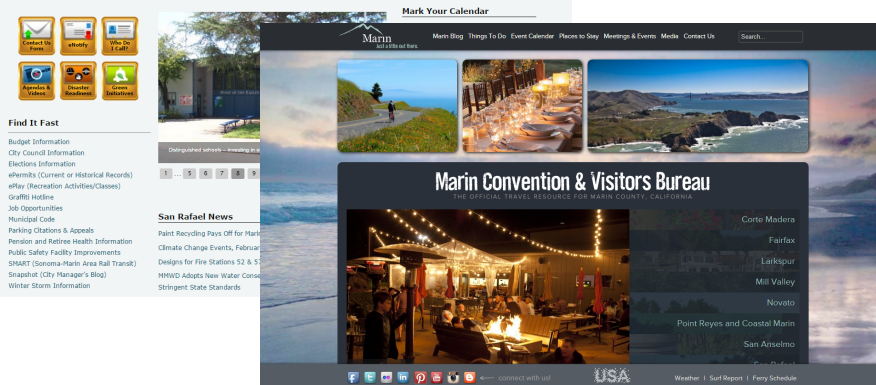
- Messaging: The City includes Mission City of Marin on its seal and a couple of places on its site, but there is no follow through on that historical message or sites to experience that aspect of its history. The photo bank refers to this motto along with visitor information but that tab includes nothing about missions here. The closest example of branded integration is between the regional CVB ad the Downtown San Rafael organization. Both suggest an eclectic, quirky experience yet that idea or language is not continued in the sites. Quirky gives license to interesting design and headlines to draw interest but not in San Rafael's message. The taglines create an expectation that does not come through. You can dig and dive in the CVB website and find interesting arts-based things to do in San Rafael but nothing has a "just a little out there" edge. There is nothing eclectic about the Downtown site.
- Design Cohesion: Other than featuring the natural landscapes there is no consistency.
- Reputation Support: The external reputation is not something that branders would necessarily feature but it demonstrates that the reputation is not based on what the San Rafael organizations are promoting.



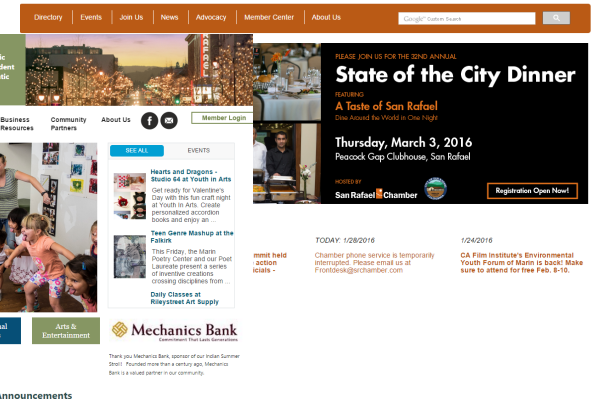
IDENTIFIED COMPETITORS

San Rafael, California

Visual Branding



San Rafael Chamber



Overall Impressions:

- **Messaging:** No integrated message coming through very content heavy sites. No mention of San Rafael as a hub or commercial center in Marin County. The city as the county seat in Marin is not mentioned. Downtown and the regional CVB hint at some quirkiness but the online viewer is not shown the eclectic side of things.
- **Design Cohesion:** There is none short of depicting the rolling hills landscape.
- **Reputation Support:** The attributes promoted are not the things associated with findings from the research.
- **Do They Have a Brand?** They hint at one. Eclectic and quirky can be compelling even for business interests. But it is underdeveloped and under-promoted.

IDENTIFIED COMPETITORS

Emeryville, California

Straplines and Logos



Positioning Lines:

- City: Be Here
- Chamber shut down in 2015
- Reputation (based on NS Research)
 - Internal: *Crowded, Industrial, Shopping, Retail, Business friendly, Overdeveloped*
 - External: *Big box stores, IKEA, Pixar*

Observations:

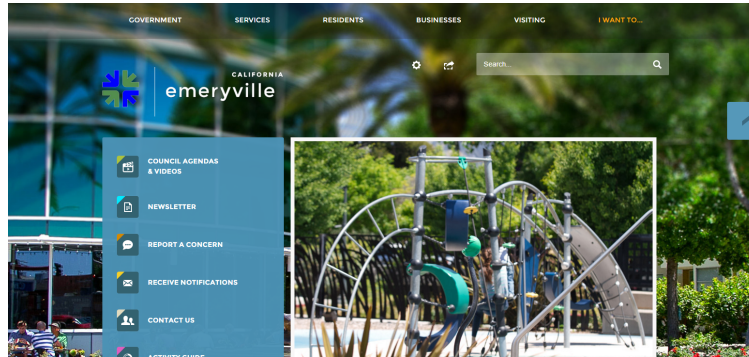
- Messaging: No messaging to speak of on the Emeryville site. The tagline was discovered on the Economic Development page after viewing a video.
- Design Cohesion: The city site is the only site presenting content on behalf of the community.
- Reputation Support: No branded message towards the shopping available or the concentration of companies based in Emeryville like Pixar, TubeMogul, Jamba Juice, Clif Bar, and LeapFrog.



IDENTIFIED COMPETITORS

Emeryville, California

Visual Branding



Overall Impressions:

- **Messaging:** No organized message presented. Location and waterfront are referenced but not celebrated.
- **Design Cohesion:** Since the Chamber closed, there is only the city site which is focused on function and utility with bulleted items.
- **Reputation Support:** High profile companies are listed on a page buried in the Economic Development pages on the city site.
- **Do They Have a Brand?** No. There is no overarching strategy or message for Emeryville. But having lifestyle, shopping and corporate assets in one square mile is ripe for a compelling brand.

IDENTIFIED COMPETITORS

Summary

What do these communities share in common? What differentiates them?

No one community stands out with a cohesive brand. Berkeley comes the closest with content that talks about diversity and culture and its food scene.

Most highlight their Bay Area (and waterfront or hills locations) which is not a differentiator since no one community makes a particular claim about their waterfront (longest shoreline, most miles of trails, etc.)

The greatest commonality between these communities is that none have a well defined, sharp, meaningful, far-reaching, integrated brand. Most city sites are strictly for utility rather than to advance a visual or strategic positioning.

It is possible to have a good reputation without an organized brand. Emeryville is without a brand really but is not without a favorable reputation.

San Rafael has the foundation of an integrated brand particularly with the regional CVB and Downtown sites but it is unrealized.

Oakland has an emerging reputation as a hip, tech-driven, foodie town but that is not obvious on its sites.

Richmond can make its waterfront a differentiator given the amount of shoreline. It is a crowded marketplace in the East Bay and Marin County, so Richmond must organize its advantages and make its strategic positioning meaningful and memorable. Since no one is excelling in the brand marketplace, it presents a unique opportunity for Richmond partners to present a cohesive branded effort for the community.

INSIGHTS

Where The Brand Should Be

During the Insights portion of this process North Star compiled and analyzed the research data with an eye toward identifying trends, relationships and emotional connections. We then used that data to craft a “storyline” that led logically to the strategic position that identifies the essence of Richmond.

During the research analysis stage we evaluated data within the framework of these questions:

- What emotional attachments can the brand hold for the consumer?
- How does the brand fit into his or her lifestyle?
- How can the brand best be used to redefine perceptions?
- How can the brand stand out in the marketplace?

These insights and resulting strategy will become the framework of our creativity and action on behalf of the brand.

INSIGHTS

So where does all of this research lead us? One thing to remember in a process like this is that we cannot tell you to be something you're not. We won't do it even if that is your secret hope. Your brand will be based on what is true and authentic. So that is why we study your history and culture but maintain an eye on the future and your aspiration. What about your history and culture differentiates you and is relevant and meaningful today for your interests and goals?

Repetition, Repetition, Repetition.

This is not just a rule of effective communication. We know we are onto something when we start hearing similar thoughts and ideas about your community.

We often heard about the 3Cs, identified as Crime, Chevron, and Corruption. Many thought your identity was reduced to just these three things that dominate some news cycles. But in closer examination people were concerned with political dysfunction in Richmond rather than corruption. We are not going to build your brand around any negative but we cannot build a brand in a vacuum either. Negatives can highlight areas of focus for implementation. We have to be realistic in how we strengthen your brand, paying careful attention to the current realities of your reputation both in terms of its context and environment. Unfortunately political dysfunction was as common a response, particularly from the outside, as crime.

INSIGHTS

If your brand is what people say about you when you are not around, is this an accurate brand for Richmond?

“Despite the positives I know about the community, their leadership does not set the best foundation for how they are perceived in the region.” - Perception Study

“Public image is poverty and ghetto and violence and crime and Chevron.” - Site Visit

“City and Chevron are in constant discord.” - Perception Study

The research revealed a long list of advantages as well. But many are not being told with enough frequency to challenge some of the negatives we heard much about. Consider this brag list for the community:

Diversity

Waterfront, shoreline

Location

History, Rosie

Available sites/buildings

Affordability

Eager to affect change; challenge convention

Parks and Bay Trail

Unique neighborhoods

Policing model

Philanthropic investment

Hard working, resilient community

BART access and ferry

Transportation (road, rail, port)

Innovative companies

Berkeley Global Campus

Proximity to main Berkeley campus

INSIGHTS

The great news for Richmond is that no one else has this list.

One of the most empowering benefits this process and uncovering competitive advantages for a community is giving residents permission to believe or permission to believe again in their city. Unfortunately we are often drawn to the negative because we want to affect change, but as you can see there is a richness to life in Richmond, it is full of opportunity and has a long list of points to be proud of. So Richmond should not be defined by any one C or three for that matter.

This process looks at those advantages and peels them back for commonalities and connections. Take North Star's hometown for example. Nashville has been riding a wave of popularity with lots of creative, tech-savvy and entrepreneurial folks moving in. Several years ago Nashville, which has long been known as Music City, chose to celebrate the creative thinking and talent behind that music, as a way to position the community far beyond music. Positioning helps us market. But that can take sacrifice. And leadership. And collaboration. If you try to be all things to everyone, you will be nothing to anyone.

Challenges and negatives give us context for implementation but do not serve as the foundation for your strategic brand. As mentioned research revealed that few are aware of the advantages and improvements Richmond has to offer. The job of the brand is to articulate and demonstrate why Richmond is a worthy location.

"Is Richmond interested in controlling its own destiny by taking control of its reputation? There always seems to be a focus on reasons why they are not successful....there's always an external reason why. Just get at your message and drown out the negativity. Demonstrate the headline you want." - Perception Study

INSIGHTS

What headline do we want? What is the message? We have a roster of advantages on which to build the brand. There is a grand diversity of people and opportunities and a demonstrative resolve to help each other and to solve problems that benefit Richmond and beyond. The setting itself is distinctive with more miles of shoreline and more completed miles of the Bay trail than any other community. And the research showed us it is less dense and more affordable than anywhere else on the waterfront.

“Richmond is consistently misperceived as high crime. People from around the Bay Area looking for housing have never explored Richmond. They often feel like they discovered something hidden.” Perception Study

“Whole new generation of people out there that see Richmond as an opportunity (business people).” - Site Visit

“Richmond is where Berkeley people come to get things done.” - Site Visit

“Gritty exciting place for people who want to make a change and thrive here. A distinct attitude of rallying, we are the place for the underdog.” - Site Visit

“Same things that make it a tough place make it an attractive place.” - Site Visit

“I stayed here because they have my back.” - Site Visit

“What drew me to the Bay Area is harder to find and afford these days. I have that in Richmond. Diversity. Convenience. Waterfront. Throw in the best dog park and the soon to start ferry, and I am at home here.”

- Site Visit

INSIGHTS

These insights were gleaned from analyzing data in order to hone in on Richmond's authentic story and competitive positioning. These conclusions based on research, guide the development of a strategic brand platform that is broad enough to include all aspects of the Richmond community but specific enough to be compelling. If we try to be all things to all people we will end up being nothing to anyone. So the platform is crafted to communicate as much as possible but narrowing in on the competitive advantage for Richmond. The strategic brand platform that follows will serve as the touch point for all creativity and action moving forward as you implement this distinction.

Target Audience:

For people seeking a Bay Area existence without being cramped or crushed by cost,

Frame-of-Reference:

Richmond, with the most miles of shoreline along the East Bay,

Point-of-Difference:

is a diverse community with a steel resolve

Benefit:

so great ideas are fulfilled on the home front of the next greatest generation.

PLATFORM RATIONALE

For people seeking a Bay Area existence without being cramped or crushed by cost,

- Richmond offers some of the most affordable housing in the Bay Area particularly in a city with a waterfront.
- The city also has prized sites and buildings sought after by business and industry.
- Although unknown to some there are great parks and open space in Richmond.
- There is less density in Richmond than other parts of the Bay Area.
- Homeownership is still attainable in Richmond.
- Convenient access to all of the Bay Area with BART and the future ferry will expand that reach and convenience.

PLATFORM RATIONALE

Richmond, with the most miles of shoreline along the East Bay,

- Many do not associate Richmond with the waterfront but should.
- This key asset allows Richmond to feature all of its beauty throughout the community.
- It demonstrates the industrial access of the port and transportation assets.
- Richmond has more miles of the Bay Trail finished than most and boasts one of the best if not the best dog park in the Bay Area.
- People love being along the water and associate a particular vibe to that.

PLATFORM RATIONALE

is a diverse community with a steel resolve

- Richmond is home to diverse cultures and ethnicities. A distinction that some Bay Area communities are losing or at least diluting.
- There is great diversity in the philanthropic pursuits here as many lead in reforms for social issues affecting many communities.
- Many companies are discovering the advantages of the business environment, access to space, and hard working workforce in Richmond.
- Richmond's rich history is about hard work, sacrifice, and global impact. Rosie and shipbuilding are figuratively and literally about steel resolve.
- That resolve is present today in how Richmond approaches challenges and growth. Tackling difficult issues in unconventional ways to achieve great results. And that extends to the great ideas in the business community on how to create and deliver products.
- Steel resolve is believable today because of your past history. It lets you claim that strength and personality and makes it relevant to today.

PLATFORM RATIONALE

so great ideas are fulfilled on the home front of the next greatest generation.

- Richmond is where many great ideas get tested or gain their footing. The community and business community take chances for advancement. A compelling attitude for advancing Richmond.
- Philanthropies invest in Richmond to address social issues.
- Richmond has demonstrated its strength as a logistical and distribution power.
- Home front is a nice way to talk about affordable real estate and home ownership but also connect to your history ad culture.
- This strong sense of community of diverse cultures will be emblematic of the next generation.
- Generation also points to the generation of new products and ideas that will impact the next generation.
- Richmond is a city on the rise and its best days are ahead of it which is exciting news for current and future residents and businesses.

EVALUATION

How Is The Brand Performing?

Evaluation yields new information which may lead to the beginning of a new planning cycle. Information may be gathered from concept pre-testing, campaign impact in the marketplace and tracking studies to measure a brand's performance over time. These methods of evaluation should be used once a visual brand identity has been established based on the strategic brand platform.

Ideally, two basic questions will be answered when there is visible implementation of your brand in the community: Have responses to the brand among target audiences changed in the way the BrandPrint intended? And have these changes resulted in consumer action that will achieve the desired objectives of the brand? Turnkey or do-it-yourself programs are recommended depending on the needs of the community.

To begin the process of brand evaluation, North Star has set up a schedule to discuss Richmond's brand progress. This schedule begins immediately after the delivery of your BrandPrint.

- Immediately – North Star recommends Richmond focus efforts on growing its inquiry and visitor database.
- One year– North Star's Research Director will conduct an assessment call to outline a plan for determining brand performance moving forward. Richmond will be contacted to determine specific measurement goals including re-measuring awareness and perception of the community amongst intended audiences.

Building your databases and keeping them current ensures future success measurements can be calculated. These leads will be the best data start point for future brand evaluation.

EVALUATION

As stated previously, North Star will consult with the community at the proposed times to evaluate your specific needs. Keep in mind that many of the research pieces in your BrandPrint were created to act as benchmarks by which future improvements can be measured. Based on what we now know of the community, likely recommendations for success measurements at Richmond's one-year mark may include:

- Online Community-Wide Survey
- Consumer Awareness and Perception Study
- Community Brand Barometer

ONLINE COMMUNITY-WIDE SURVEY

Purpose

The purpose of the Online Community-wide Survey is to gain a quantitative measure of the community's perceptions of Richmond.

Methodology & Results

This qualitative survey is fielded online and is open to all residents of the community. The study measures the following:

- Overall top-of-mind perceptions of Richmond
- Strengths and weaknesses of Richmond
- Resident suggestions on what is missing from Richmond
- Measurements of Richmond quality of life indicators

Positive resident perceptions are a strong indicator of brand success. Successful brand implementation will energize the resident base, making them more likely think of the community in a positive light.

Timing

The Online Community-Wide Survey should be conducted annually. The first survey should be conducted no sooner than one year from brand introduction (when there is visible implementation of your brand in the community).

CONSUMER AWARENESS & PERCEPTION STUDY

Purpose

The purpose of this study is to gain insight into external consumer awareness, visitation, and perceptions of Richmond.

Methodology & Results

This quantitative survey is fielded online outside of Richmond's borders in order to obtain an outsider's perspective. The survey measures:

- Overall top-of-mind perceptions of Richmond and immediate competitors
- Consumer visitation trends (frequency and nature of visitation)
- Consumer visitation drivers (business, leisure, friends and family)
- Strengths and weaknesses of Richmond identified within community attributes
- Consumer suggestions on what is missing from Richmond
- Measurements of Richmond's quality of life indicators

Timing

The CAP Study should be conducted annually. The first survey should be conducted no sooner than one year from brand introduction (when there is visible implementation of your brand in the community).

COMMUNITY BRAND BAROMETER

Purpose

The Community Brand Barometer measures strength of the Richmond brand according to:

- Resident satisfaction/advocacy with the brand as a place to live, work, and visit
- Brand satisfaction/advocacy relative to the nation.

Methodology & Results

The methodology for the Brand Barometer has been carefully developed and determined to be statistically significant. Participants answer three questions:

- Would you recommend living in Richmond to a friend or colleague?
- Would you recommend visiting Richmond to a friend or colleague?
- Would you recommend conducting business in Richmond to a friend or colleague?

Resident advocacy is one of the strongest measures of brand success. Successful brand implementation will energize the resident base, making them more likely to recommend their community to others.

Timing

The Community Brand Barometer should be conducted annually. The first Brand Barometer should be conducted no sooner than one year from brand introduction (when there is visible implementation of your brand in the community).