

# CITY OF WEST HOLLYWOOD

# Westside Corridor Assessment Study & Opinion Survey

Conducted for the City of West Hollywood

August 2006

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### INTRODUCTION

Godbe Research is pleased to present the results of this economic assessment and opinion survey conducted for the City of West Hollywood. This report examines the types of businesses found along the Westside corridor and presents a comparison to four other areas which have undergone a successful economic redevelopment while retaining the GLBT identity of the area. The Westside corridor study area is defined by the Westside Specific Plan. Included in this comparison is an examination of the distribution of business within 13 categories, and a gap analysis of businesses that are present in these comparison areas but may be missing, or present in lower concentrations, in the Westside corridor.

This report also includes the results of four surveys intended to explore the opinions of different groups regarding the corridor:

- A survey of residents in West Hollywood:
- A survey of consumers within the Westside corridor:
- A survey of business within the Westside corridor; and
- A survey of individuals in two areas within the Los Angeles region with nightlife comparative to West Hollywood.

These surveys are a component of the public outreach effort for the Westside Specific Plan. The ideas and opinions expressed will be shared at future public outreach meetings and incorporated in to the planning process.

The report is organized into the following sections:

- The Executive Summary includes a summary of the Key Findings from the survey and secondary research, a short description of the project methodology, and the Conclusions and Recommendations for the City of West Hollywood.
- The Summary of Findings section offers an in-depth analysis of the survey findings. The discussion is organized into the following sections:
- City Profiles
- Survey Highlights
- Consumer Behavior and Profiles
  - Reasons for Visiting the Westside Corridor
  - Profile of Leisure Activity Visitors
  - Profile of Shopping Visitors
  - Profile of Routine Visitors
  - Time and Frequency of Visits to the Westside Corridor
  - Alternative Leisure and Shopping Locations
- Business and Commercial Preferences
- Development Preferences
- Quality of Life Issues
- Gay and Lesbian Identity of the Corridor
- Appendix A provides the report methodology

- Appendix B provides the Resident Survey questionnaire
- Appendix C provides the Consumer Intercept Survey questionnaire
- Appendix D provides the Business Survey questionnaire
- Appendix E provides the Comparative Nightlife Survey questionnaire
- Appendix F provides the Topline results from the City's own survey completed in the corridor during "Pride Weekend"

### **EXECUTIVE SUMMARY**

### Introduction

In April 2006, the City of West Hollywood hired Godbe Research to conduct an economic assessment and opinion survey of the Westside corridor (WSC) of the City of West Hollywood, which is defined by the boundaries of the Westside Specific Plan. This area incorporates Santa Monica Boulevard from Olive Drive to Doheny Drive, Melrose Avenue from Robertson Blvd. to Doheny Drive and the triangle between SMB and Melrose west of Robertson Blvd.

The primary research objectives of the study were as follows:

- To review and analyze available market comparisons to comparable business communities;
- To gather opinions and attitudes from daytime and evening patrons, as well as businesses within the Westside corridor, and residents of the City of West Hollywood;
- To analyze shoppers origins and destinations;
- To evaluate West Hollywood's competitive advantages and disadvantages;
- To gather information on consumers' parking habits within the corridor;
- To accumulate market perceptions of the area;
- To identify current obstacles to increased business in the corridor; and
- To gather demographic information on consumers within the corridor and residents of West Hollywood.

# **Project Methodology**

There are five major components to this study:

- Phase One included the analysis of secondary data for market comparisons and industry trends between the City of West Hollywood and four comparison areas: Hillcrest in San Diego, The Castro in San Francisco, The Halstead in Chicago, and DuPont Circle in Washington DC.
- Phase Two of the research conducted intercept interviews with 450 patrons within the Westside corridor. Interviews were conducted with consumers in five areas within the Westside corridor using intercept style interviews and hand held Palm Pilots for data collection.
- Phase Three of the project conducted a telephone survey of 400 City of West Hollywood residents.
- Phase Four of the project conducted surveys with 49 local business owners and managers using both the intercept interview and telephone survey methods, randomly selected from a list of businesses acquired through the City's Records Department. An effort was made to represent businesses of all types and sizes.
- Phase Five of the research conducted patron surveys in two other selected areas in the region which have a night life scene with similar characteristics to that in West Hollywood. The two selected areas were Silver Lake and the Belmont Heights/ Shores area of Long Beach.

A more complete description of the methodology used for this study can be found in Appendix A of the report.

# **Key Findings**

### Primary Reasons for Visiting the Corridor

The main reasons given by residents for their last trip to the Westside corridor were:

- To go to a restaurant (20%);
- General or window shopping (13%);
- To use neighborhood services (12%);
- To buy groceries or food (10%); and
- To go to or leave work (8%).

The main reasons given by consumers for their current trip to the Westside corridor were:

- To go to a restaurant (35%);
- To go to a bar (20%);
- For general or window shopping (15%);
- To use neighborhood services (5%); and
- To buy food or a beverage to go (5%).

### Business Shortages in the Corridor

Residents indicated that the main types of business they would like to see more of in the Westside corridor were:

- Entertainment venues other than bars (56% would like to see more);
- Small independent stores and shops (51% would like to see more); and
- Restaurants (41% would like to see more).

Consumers who lived in the local region indicated that the main types of business they would like to see more of in the Westside corridor were:

- Restaurants (52% would like to see more);
- Small independent stores and shops (47% would like to see more); and
- Entertainment venues other than bars (43% would like to see more).

### Development Priorities for the Corridor

The highest development priorities of residents for the corridor were:

- A plaza with benches and landscaping;
- Cultural facilities such as a museum or playhouse;
- Small retail shops; and
- A movie theater.

The highest development priorities of local consumers for the corridor were:

- A plaza with benches and landscaping;
- A movie theater;
- A civic center building that provides a non-commercial gathering space; and
- Housing, such as apartments or condominiums.

# Issues of Importance when Visiting the Corridor

The main issues of importance for residents when visiting the corridor were:

- General safety in and around the community;
- The walkability of the area;
- Availability of parking; and
- Traffic in and around the region.

The main issues of importance for local consumers when visiting the corridor were:

- General safety in and around the community;
- Availability of parking;
- The type of nightlife and bars in the area; and
- Traffic in and around the region.

# Satisfaction and Dissatisfaction with Issues and Characteristics of the Corridor

Residents were most satisfied with the following issues and characteristics of the corridor:

- The walkability of the area;
- General safety in and around the community; and
- The type of restaurants in the area.

Conversely, residents reported that they were dissatisfied with:

- Traffic in and around the region;
- Availability of parking; and
- Cost of parking.

Local consumers were most satisfied with the following issues and characteristics of the corridor:

- The type of nightlife and bars in the area;
- The gay and lesbian identity of the area; and
- The type of restaurants in the area.

The Gay and Lesbian community was most satisfied with the following issues and characteristics of the corridor:

- The walkability of the area;
- The gay and lesbian identity of the area; and
- The type of nightlife and bars in the area.

Conversely, local consumers reported that they were dissatisfied with:

- Availability of parking; and
- Cost of parking.

Residents were most satisfied with the following issues and characteristics of the corridor:

- The walkability of the area;
- General safety in and around the community; and
- The type of restaurants in the area.

### Main Reasons Businesses are Located in the Corridor

Respondents indicated that the main reasons for locating their business in the Westside corridor were:

- Clientele;
- Cost for rent;
- Quality of life;
- Low crime rate; and
- Available workforce.

# A Lack of Parking is the Primary Issue of importance for Local Businesses

The findings of the business survey suggested that insufficient parking space was the primary issue of importance for local businesses in the Westside corridor:

- 84% of business respondents highlighted "Not enough parking" as one of the two
  most important issues facing the business community in the Westside corridor;
- 76% indicated that "Increasing available parking" was the one thing they would like to see improved for the local business community;
- 86% were dissatisfied with the availability of parking in the corridor;
- 78% thought that "Building a multi-story parking structure" was a high priority for the corridor;
- 73% indicated that a "Lack of parking" was a "Very limiting" factor to their business growth, while an additional 24% said it was a "Somewhat limiting" factor;
- 43% thought that "Municipal requirements for additional parking" were "Very limiting" to their business growth, while an additional 41% thought this was a "Somewhat limiting" factor;
- 21% of business owners/ managers who were planning to relocate their business outside of West Hollywood highlighted a lack of parking as one of the most important reasons for this decision.

#### Most Businesses Satisfied with the Current Business Climate

Ninety percent of business owners/ managers indicated that they were satisfied with the business climate in the City of West Hollywood. In particular, businesses were most satisfied with:

- Clientele:
- The look and feel of the Westside corridor;
- Business visibility; and
- The quantity and/ or quality of special events.

The only issue which businesses were dissatisfied with overall was the availability of parking.

# Business Priorities for the Westside Corridor

The highest overall priorities for local businesses were:

- Building a multi-story parking structure;
- Improving pedestrian areas with landscaping and lighting;
- Creating a stronger identity for the area; and
- Providing additional entertainment facilities, such as a movie theater or concert venue.

Conversely, the lowest overall priority identified among business respondents was "Providing a civic center building with gathering space."

### **Expectations of Business Growth**

Business respondents in the Westside corridor were typically positive about the future prospects of their respective businesses. Overall, 82 percent thought their business would "Increase" over the next 12 months, 12 percent thought it would "Stay about the same," and four percent thought it would "Decrease."

## Comparative Economic Profile

A community is made up of more than just the businesses that can be found within its borders. However, a more complete understanding of the business profile of a community and how it compares to other similar communities can reveal economic development opportunities. For this study, West Hollywood's Westside corridor business profile was compared to similar profiles developed for The Castro (San Francisco, CA), DuPont Circle (Washington DC), the Halstead (Chicago, IL) and Hillcrest (San Diego, CA). Some of the key findings from this analysis include:

- Importance of Retail, Art & Design and Food & Beverage Businesses in the Westside Corridor – In the four comparable communities, these businesses represented less than 10 percent of the revenue generated in their respective communities compared to over 50 percent of the revenue generated in the Westside corridor;
- Under-representation of Medical & Dental Offices, Legal & Government
   Offices and Business Services in the Westside Corridor In the four
   comparable communities, these businesses represented over one-third of the
   revenue generated in their respective communities compared to less than four
   percent of the revenue generated in the Westside corridor.

# Mean Annual Wages in Los Angeles County

The following wage averages show the differences in mean annual wages in Los Angeles County between the industries both over-represented and under-represented in the Westside corridor:

- Full-service restaurants (a representative industry found in the Food and Beverage business) was \$20,359<sup>1</sup>;
- Clothing stores (a representative industry found in the Retail business) was \$25,193;
- Accounting services (a representative industry found in Business Services) was \$50,938;
- Offices of dentists (a representative industry found in Medical and Dental Offices) was \$52,896.

<sup>&</sup>lt;sup>1</sup> All annual mean wage date was taken from Occupational Employment Statistics sorted by NAICS and SOC code. Data was compiled by California's EDD for the Los Angeles County in November 2004.

### Conclusions & Recommendations

Based on the findings of the primary and secondary research, Godbe Research offers the following conclusions and recommendations to the City of West Hollywood regarding the Westside corridor.

#### Comparative Economic Profile

Overall, the findings of the comparative analysis indicate that the Westside corridor is more dependent on retail revenue and food and beverage sales than comparable business corridors. Developing a more diverse economic base in the Westside corridor would provide tangible benefits for the community, including higher wages for those working in the corridor and greater stability in the event of economic slowing or downturns.

Increased wages for those working in the corridor would not only allow a greater portion of the corridor's current employees to live and work in the City of West Hollywood, but would also increase the multiplier effect from employee spending in the corridor, as current employees of the Westside corridor are likely to spend more money in and around their place of work.

#### Development Priorities for the Corridor

One of the central research objectives of this study was to gather feedback from West Hollywood residents, business owners and managers, as well as consumers and potential consumers, to determine the commercial and non-commercial priorities for the Westside corridor. While the different groups of respondents did not uniformly agree on all of the priorities for the corridor, there were some important themes that came out of the survey results.

- Maintain and develop the small, independent, walkable feel of the Westside corridor: Residents and consumers consistently preferred smaller, independent stores and shops to larger retail establishments for the Westside corridor. From a non-commercial perspective, residents and consumers also agreed on the importance of maintaining and expanding the walkability of the area and developing plazas with benches and some type of landscaping within the corridor. These preferences indicate a desire to build upon the small, independent and unique feel of the corridor.
- Expand entertainment and leisure options beyond bars and nightlife: Whether it is more playhouses, cultural facilities such as museums, concert venues or even a movie theater, residents and consumers generally agreed that the corridor needs more options for entertainment and leisure activities. Respondents also consistently indicated that there was not a strong need for more bars and nightlife, gay, straight, or otherwise.
- Parking, parking and parking, the top-three obstacles for immediately increasing business in the corridor: Whether you were talking to business owners and managers, residents, or consumers, parking was usually indicated as one of the biggest considerations when deciding whether or not to visit the corridor area. Business owners and managers in the corridor were generally positive about all aspects of doing business in the corridor, other than parking availability and the municipal regulations associated with parking.

#### Gay and Lesbian Identity of the Corridor

The perceived identity of the Westside corridor is an essential consideration in planning the corridor's future. A vital part of the corridor's identity is its active gay and lesbian community, sense of safety for gays and lesbians, and the presence of goods and services oriented to the gay and lesbian community.

Results from multiple surveys show that the importance and satisfaction with the gay and lesbian identity of the corridor remains high, particularly among those groups that identify most with the GLBT community.

Results from our surveys show that groups that place a higher importance on the gay and lesbian identity within the corridor were more likely to be satisfied with the corridor's current identity.

Respondents from comparative gay nightlife areas (Silver Lake and Belmont Heights) were most satisfied with the gay and lesbian identity of the corridor and the variety of gay and lesbian leisure and social activities.

The City's own survey completed in the corridor during "Pride Weekend" showed that 81 percent of respondents were either very (45%) or somewhat (36%) satisfied with the GLBT identity of the corridor, while very few were dissatisfied overall (5%). A majority of respondents to the City's survey also indicated that West Hollywood's gay identity was stronger than it had been in the past (54%). This compares to only 21 percent that indicated it was weaker than in the past.

<sup>&</sup>lt;sup>2</sup> Results were based on the survey completed by 633 respondents from the revised version of the survey used Saturday afternoon and Sunday

# Potential Uses to Consider in Programming for Metro Division Seven Site

The Metro division seven site provides one of the most significant redevelopment opportunities in the Westside corridor. The comprehensive list of potential uses for this space was developed based on survey findings and our secondary research of the corridor. The following elements should be considered in any future discussions of how Metro division seven site will be redeveloped.

- 1. Entertainment Technology Business Park: This small campus environment would invite small to medium-sized businesses that are focused on the technology side of creative design in the entertainment realm. These businesses would serve as a compliment to the Pacific Design Center (PDC), particularly geared towards the type of businesses that would locate at the Red Building. Businesses in this space would be at the intersection between art and entertainment, software development and information technology, providing services for the entertainment industry, the video gaming industry, and the motion picture and television production industry.
- An amphitheater and playhouse with complimentary services: A multi-use
  facility could provide a central location within West Hollywood and the Westside
  corridor for alternative entertainment opportunities, such as plays or concerts,
  and could also be used as a community meeting venue.
- 3. A multi-level parking structure: A multi-level parking structure to provide additional public parking opportunities for area businesses. While not a very exciting ingredient in planning the immediate future of the Westside corridor, it is a necessary one. While the development of the West Hollywood municipal parking structure on San Vicente should help alleviate some of the demand for parking, many of the other elements that are being offered for the Metro Division Seven site will only further increase demand for parking.
- 4. Upscale Hotel: An upscale hotel that could cater to members of the gay and lesbian community, business travelers, and those in the entertainment industry. This hotel would provide a more luxurious lodging option than the hotels that currently exist in the Westside corridor.
- 5. **Movie Theatres**: A movie house in the heart of the Westside corridor could offer both art-house and mainstream films. A movie theatre would satisfy both residents and consumers demand, both indicated it was a top-tier development priority for the corridor. This type of entertainment facility would also increase the number of potential retail customers in the community.
- 6. Open space and Green Plazas: Any discussion of redevelopment in West Hollywood should include some consideration of open space and plazas that could improve the walkability of the corridor, provide places for casual gatherings, and create recreation opportunities. It should be noted that "A Plaza with benches and landscaping" was the top priority for residents and consumers when asked about different development options in the Westside corridor.