

NOVEMBER 18, 2019

# VISIT QUAD CITIES

DESTINATION VISION  
& STRATEGIC VISION

COMMUNITY  
SURVEY



# OVERVIEW

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The role of destination marketing and management organizations (DMMO) is undergoing profound changes. These organizations are increasingly becoming responsible for activities beyond attracting greater numbers of visitors. Today's DMMO leaders need to be thoughtful about how the quality of life for residents can be balanced with the quality of the visitor experience; about the kinds of visitors who would most appreciate the destination's character, its people and its offering; and how communities can responsibly grow a tourism industry for the benefit of all.

During this foundational step of the Tourism Master Planning process, the goal is to identify and define general attitudes towards living in the Quad Cities region and tourism's impact on resident quality of life. While desk research is valuable to paint a picture of a destination's broader market opportunities, primary research allows us to ask specific questions:

- What do residents think of the Quad Cities region as a place to live?
- What are the most important attributes to resident quality of life?
- How do residents view the tourism industry and its impact on the community?

The answers to these questions help address key issues with respect to livability, culture, economy and sense of place.

# METHODOLOGY

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In consultation with Visit Quad Cities staff and the Destination Vision and Strategic Plan Leadership Steering Committee, Resonance developed an online survey to identify and gauge residents' perceptions on a variety of key characteristics with respect to livability, culture, economy and sense of place. Input was also provided by the Q2030 Regional Action Plan "Cool Places" Roundtable. The survey was extensively promoted via media platforms and email to the databases of a variety of public and private organizations as introduced by Visit Quad Cities staff. The survey questions were designed to:

- Assess resident understanding and perception of tourism as an industry and its impact on the Quad Cities community
- Identify assets that may offer potential for increasing the resident quality-of-life and tourism growth
- Assess the quality and satisfaction with current services, accommodation and amenities throughout the Quad Cities
- Engage residents in the development phase to accelerate the approval and design process for permanent changes in the future

More than 1,900 residents of the Quad Cities community participated in the survey.

# SUMMARY

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Quad Cities residents recognize the importance and benefits of the tourism industry; however, they consistently underestimate the industry's size and value. The Community Survey Report identifies opportunities for the Quad Cities tourism industry to improve the telling of its story and educate the public regarding the overall value of tourism to the region's economy. The report also identifies the need to create resident advocates and articulate and emotionalize the region's unique personality to help visitors and Quad Citizens connect with the destination in new ways.

## KEY FINDINGS

- 93% of residents believe that tourism is good for the Quad Cities
- 83% of residents are likely to encourage friends and family to visit the region
- 49% of residents believes the Quad Cities is a destination visitors want to visit
- 40% of residents are concerned about tourism's impact on the community
- 16% of residents feel the current visitor intake is just right, while 66% feel it is not enough and less than one percent of residents feel the Quad Cities is currently attracting too many visitors
- 55% of residents underestimate the number of annual visitors to the Quad Cities region (an additional 43% responded they don't know)
- 53% of residents underestimate the number of jobs created by tourism in the Quad Cities region (an additional 34% responded they don't know)
- Over 90% of residents believe tourism creates economic growth in the region and opportunities for business and employment
- 41% of residents believe tourism results in increased traffic congestion
- Culinary offerings, nature and parks, outdoor activities, theater and concerts and festivals and events were listed as the experiences that are most important to resident quality of life in the region
- Cost of living, good place to raise a family, proximity to the Mississippi River and friendly people were listed as the best things about living in the Quad Cities region
- Road quality, safety and crime and the climate were listed as least-liked attributes of the Quad Cities region

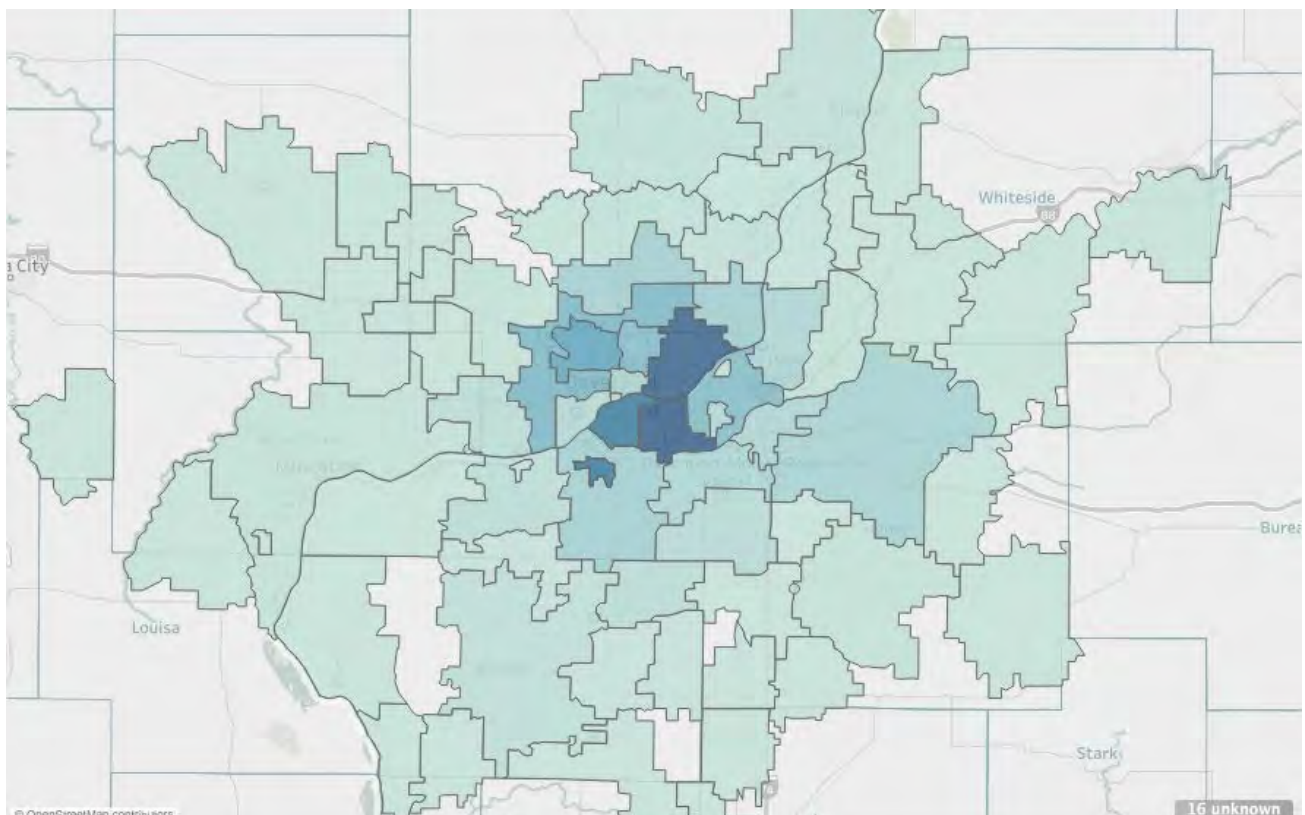


# DEMOGRAPHICS

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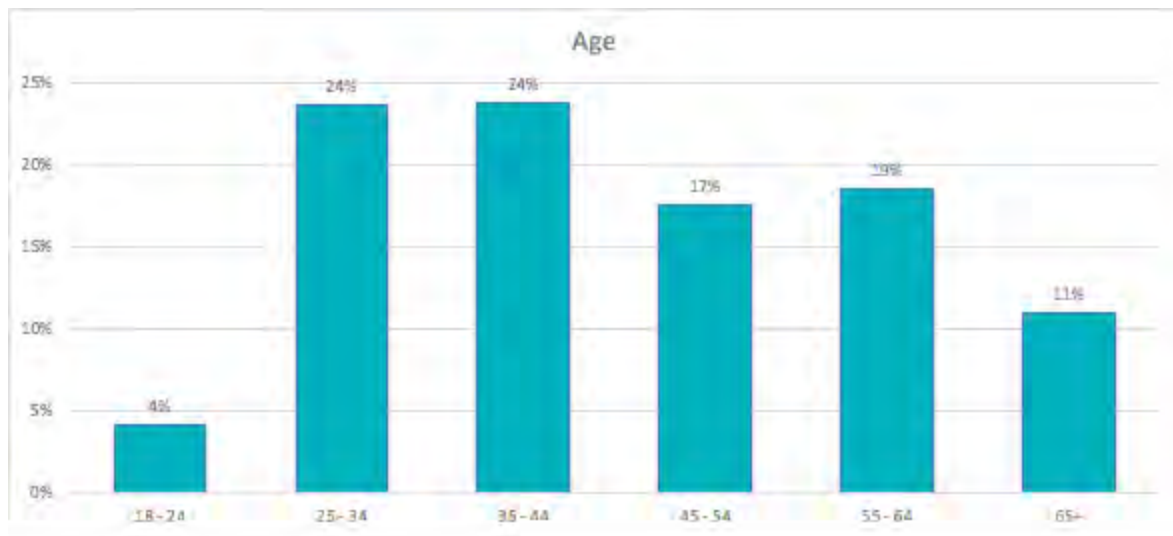
## GEOGRAPHY

Respondents from various parts of the region were well represented as the map below demonstrates. The darker shaded areas indicate a higher number of responses from the region. The highest response rates came from Moline, Bettendorf, Rock Island and Davenport.



## AGE

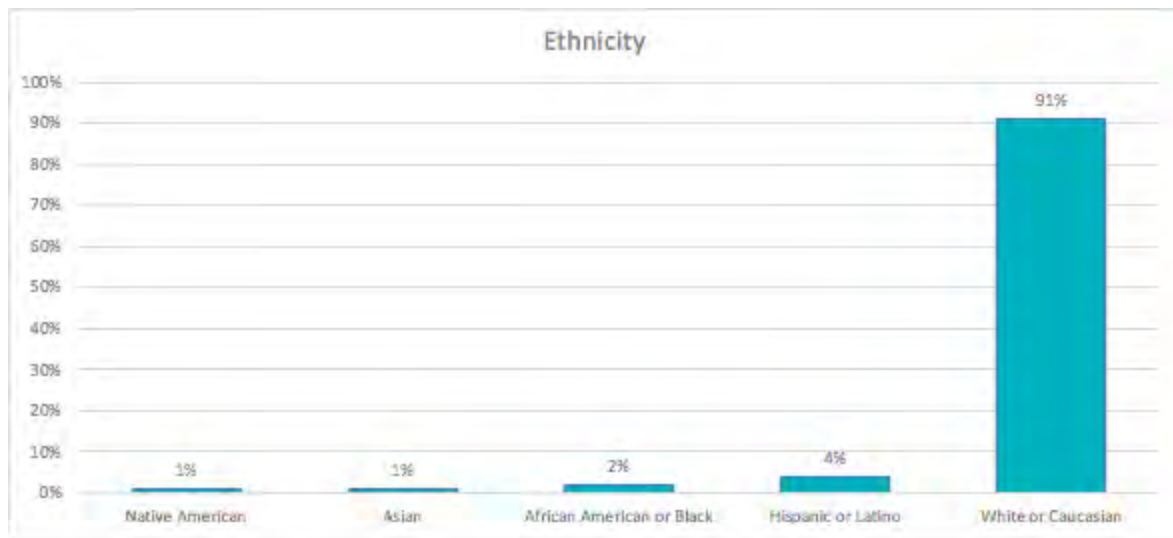
Approximately one-quarter of residents fell between the ages of 25-34 and 35-44. One in ten respondents reported being over the age of 65. Generation Z residents, aged 18-24, were underrepresented at only 4% of the survey respondents.



Q. What is your age?

## ETHNICITY

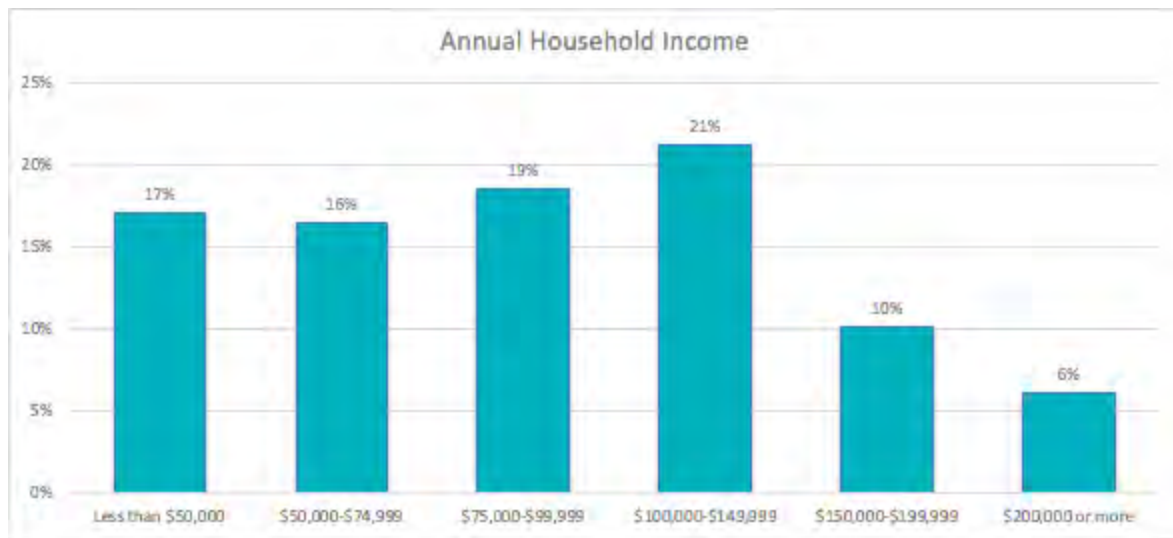
The vast majority of respondents, over 90%, reported being white or caucasian. Hispanic or latino residents accounted for 4% of the respondents, while African American and Asian residents accounted for 2% and 1% of the population, respectively. It should be noted that this makeup is closely aligned with the general population of the Quad Cities.



Q. To make sure we are representing the views of a broad mix of people, please indicate the ethnic group to which you belong. (Check all that apply)

## HOUSEHOLD INCOME

Respondents from various income groups were well represented. It should be noted that with a median household income for the Quad Cities Iowa/Illinois metro area of \$54,173 in 2017, survey respondents tended to have a slightly higher annual income than average Quad Cities residents.

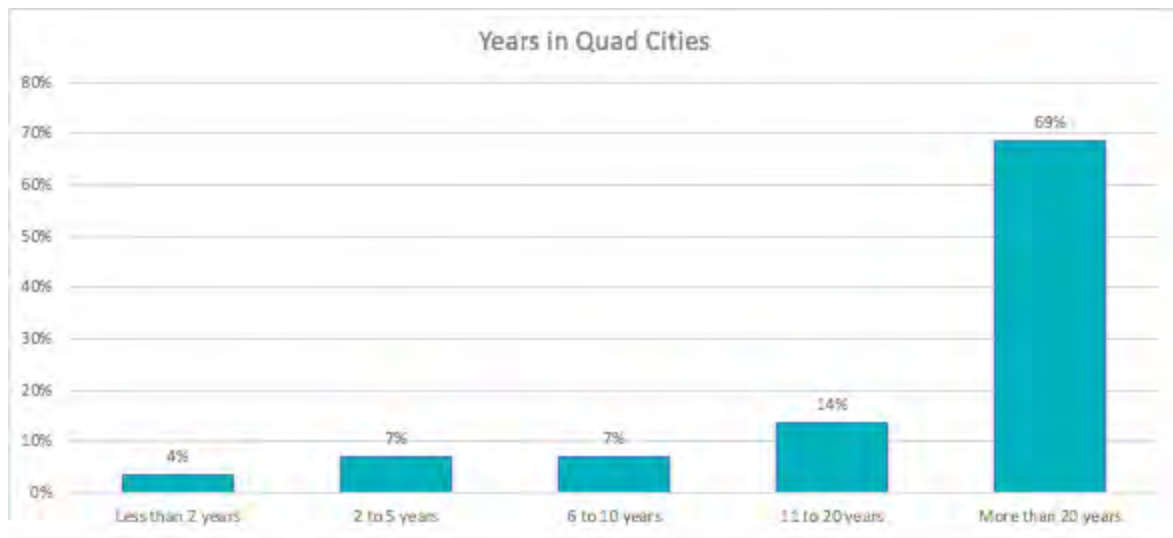


Q. Which of these ranges includes your total annual household income, before taxes for 2018?



## NUMBER OF YEARS IN QUAD CITIES

Nearly 70% of the respondents have lived in the Quad Cities for more than 20 years, while one in twenty is a new resident, relocating to the Quad Cities within the last two years. This high proportion of longtime residents speaks to the need to reverse net migration trends, outlined in the Q2030 Regional Action Plan.



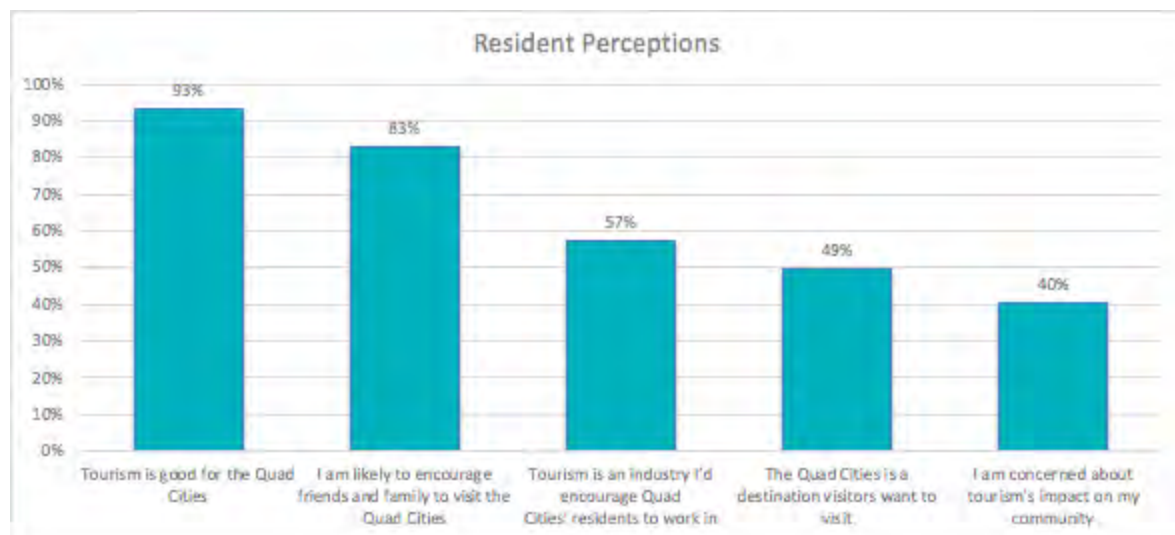
Q. How many years have you lived, worked or studied in the Quad Cities?

# RESIDENT PERCEPTIONS

## PERCEPTIONS OF TOURISM

More than 90% of residents believe that tourism is good for the Quad Cities and more than 80% indicate they are likely to encourage friends and family to visit the region. However, less than 60% of residents agree tourism is an industry they would encourage Quad Cities residents to work in and less than half believe the Quad Cities is a destination visitors want to visit. Four in ten residents expressed concern about tourism's impact on the community.

Quad Cities region residents who indicated they work in the hospitality and tourism industry were much more likely to agree tourism is an industry they would encourage residents to work in (76% vs 57%). Younger residents (under the age of 35) were less likely to agree the Quad Cities is a destination visitors want to visit (39% vs 49%). Older residents, by contrast, were more likely to agree the Quad Cities is a destination visitors want to visit (61% vs 49%), however they were also more likely to agree they are concerned about tourism's impact on the community (51% vs 40%).



Q. Do you agree with the following statements?

## NUMBER OF VISITORS

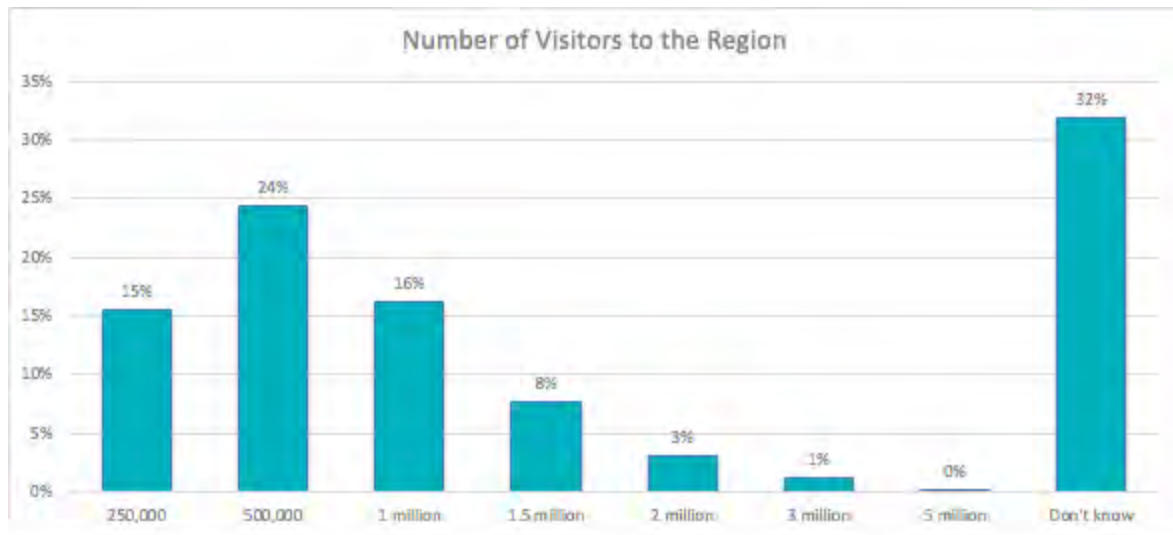
Two-thirds of residents feel that the Quad Cities should be attracting more visitors, while one in six feels the number is just right. Less than one percent of residents surveyed indicated that the Quad Cities region is currently attracting too many visitors to the destination.



Q. Overall, from your perspective, do you think that the Quad Cities attracts too many, too few, or just the right amount of visitors?

## CURRENT VISITATION LEVELS

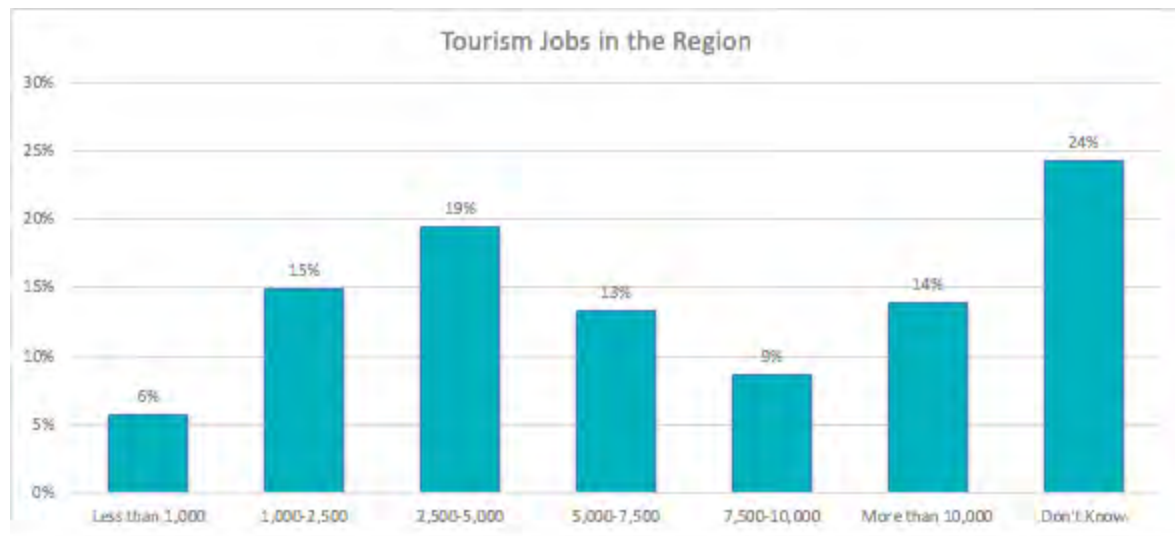
More than half of the residents surveyed underestimate the number of annual visitors to the Quad Cities (1.6 million), while an additional 32% of residents indicate that they don't know the number of annual visitors to the region.



Q. How many visitors do you think come to the Quad Cities each year?

## TOURISM EMPLOYMENT

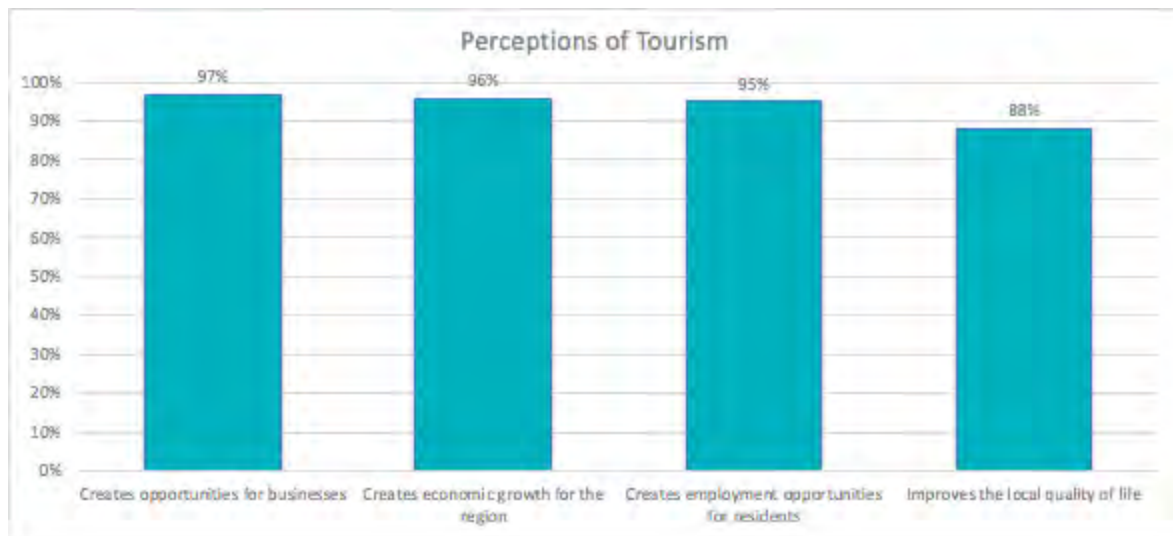
53% of residents underestimate the number of jobs created by tourism in the Quad Cities (8,140) and an additional 24% indicate they don't know how many Quad Cities residents are employed in the tourism industry.



Q. How many Quad Cities workers do you think are either directly or indirectly employed in the tourism industry?

## TOURISM'S POSITIVE IMPACT

More than 90% of residents believe that tourism creates opportunities for businesses, economic growth for the region and employment opportunities for residents. Roughly nine in ten agree that tourism improves the local quality of life.

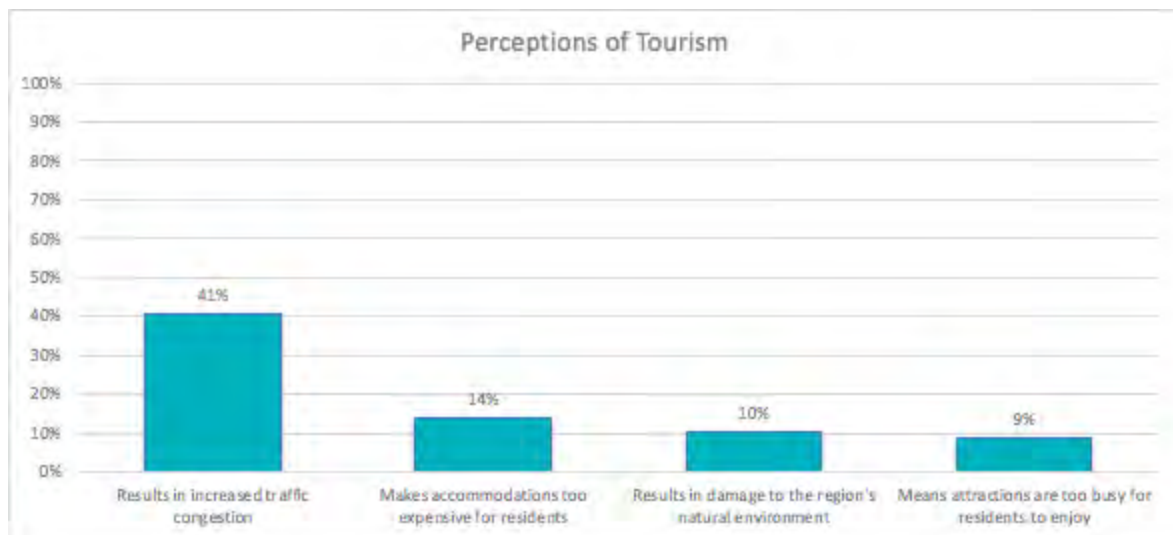


Q. From your perspective, to what extent do you agree or disagree with each of these statements? Tourism to the Quad Cities...



## TOURISM'S NEGATIVE IMPACT

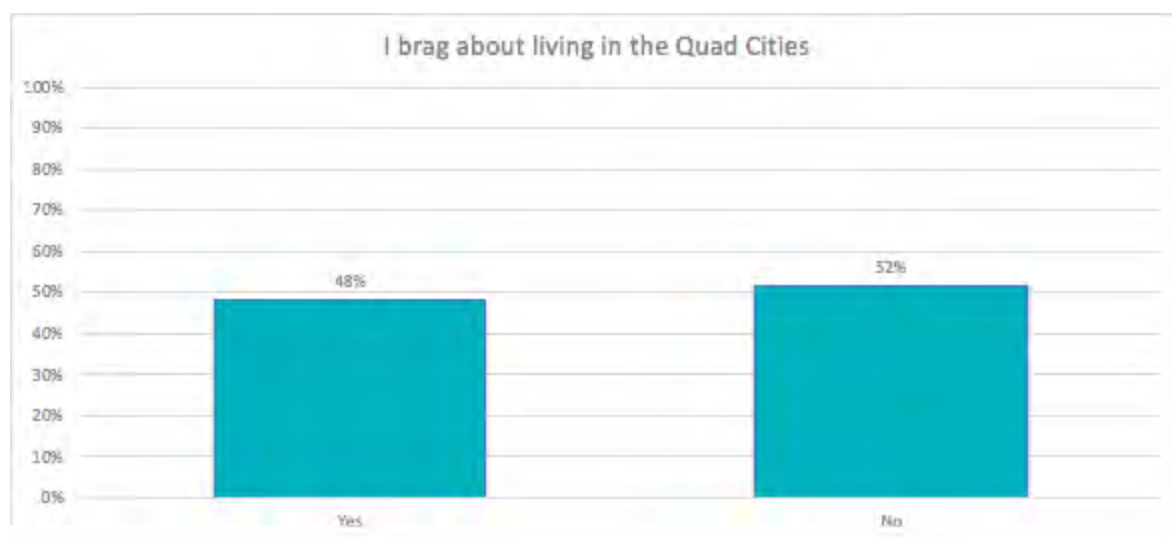
When asked about the potential negative impacts of tourism on the Quad Cities, four in ten respondents indicated they believe tourism results in increased traffic congestion, while roughly one in ten agree that tourism makes accommodations too expensive for Quad Cities region residents, results in damage to the region's natural environment or means attractions are too busy for residents to enjoy. Older residents (over 55) were less likely to agree that tourism contributes to all of the negative impacts listed, despite earlier being more likely to indicate they are concerned about tourism's impact on the community.



Q. From your perspective, to what extent do you agree or disagree with each of these statements? Tourism to the Quad Cities region ...

## BRAGABILITY

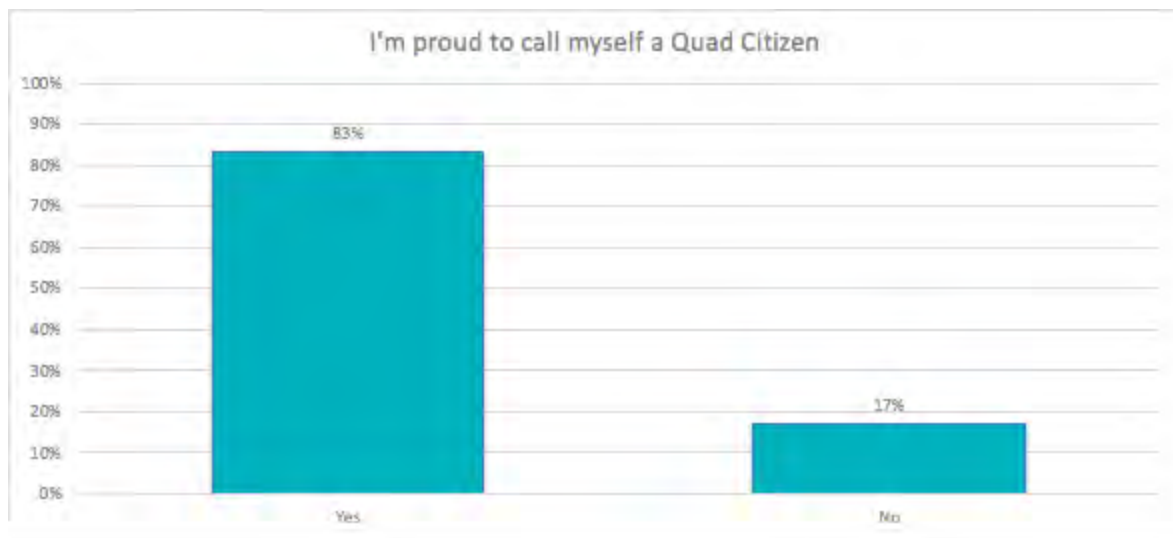
Roughly half (48%) of residents agree that they brag about living in the Quad Cities. This represents a dramatic increase from the 29% of residents who indicated they brag about living in the Quad Cities in the 2016 Q2030 survey. Younger residents (under the age of 35) were less likely to agree they brag about living in the Quad Cities (39% vs 48%). On the other hand, older residents (55 and over) were more likely to brag about living in the Quad Cities (60% vs 48%).



Q. Do you agree with the following statement, "I brag about living in the Quad Cities."

## RESIDENT PRIDE

More than 80% of Quad Cities residents agree they are proud to call themselves a Quad Citizen. Once again, this is a dramatic increase from the 53% of residents who agreed they are proud to call themselves Quad Citizens in the 2016 Q2030 survey. Younger residents (under the age of 35) were slightly less likely to agree they are proud to call themselves a Quad Citizen (77% vs 83%). Once again, older residents were more likely to be proud to call themselves a Quad Citizen (88% vs 83%).



Q. Do you agree with the following statement, "I'm proud to call myself a Quad Citizen."

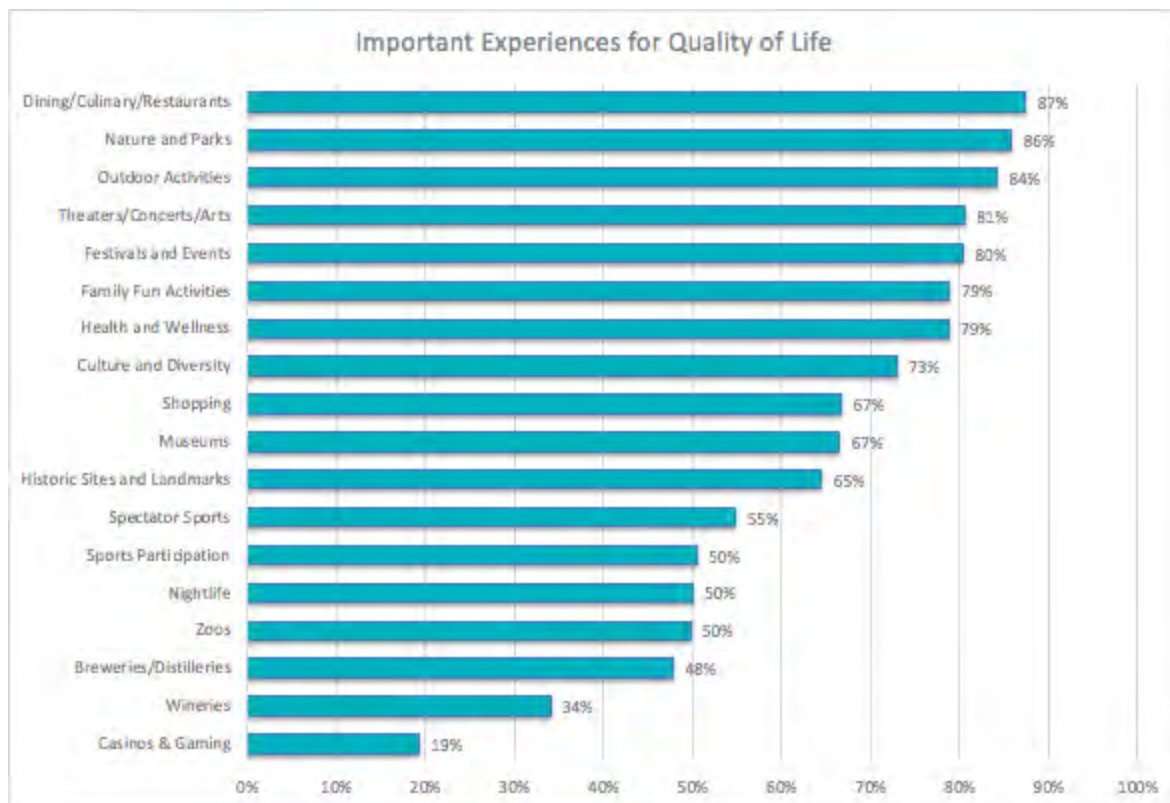
## QUAD CITIES KEYWORDS

When asked for the top three words that come to mind when thinking of the Quad Cities, the most common responses from residents were ‘river,’ ‘Mississippi,’ ‘John Deere,’ ‘friendly,’ ‘home,’ ‘family,’ ‘city,’ ‘diverse,’ ‘community’ and ‘Bix.’ The keywords demonstrate the opportunity to leverage the region’s top untapped asset, the Mississippi River, to create an iconic world-class destination as outlined in the Q2030 Regional Action Plan. The word cloud below highlights the words given by residents, with the larger words being suggested more frequently. It should be noted that the misspelling of John Deere in the graphic below is due to the spelling errors in resident responses.



## IMPORTANCE OF QUAD CITIES EXPERIENCES

Nearly nine in ten Quad Cities residents feel that ‘dining/culinary/restaurants’ and ‘nature and parks’ are important to their quality of life, followed closely by ‘outdoor activities’, ‘theater/concerts/arts’ and ‘festivals and events’. ‘Casinos and gaming’ and ‘wineries’ were listed as the least important attributes to quality of life at 19% and 34% respectively. Younger travelers (aged 24-34) were more likely to find ‘culture and diversity’ and ‘nightlife’ as important.



Q. How important are the following attributes to your quality of life as a resident of the Quad Cities?

## QUALITY OF QUAD CITIES EXPERIENCES

'Breweries/distilleries' and 'festivals and events' were rated by Quad Cities residents as the highest quality experiences in the region, followed by 'theaters/concerts/arts', 'nature and parks' and 'dining/culinary/restaurants'. 'Wineries' and 'shopping' were rated as the lowest quality experiences.

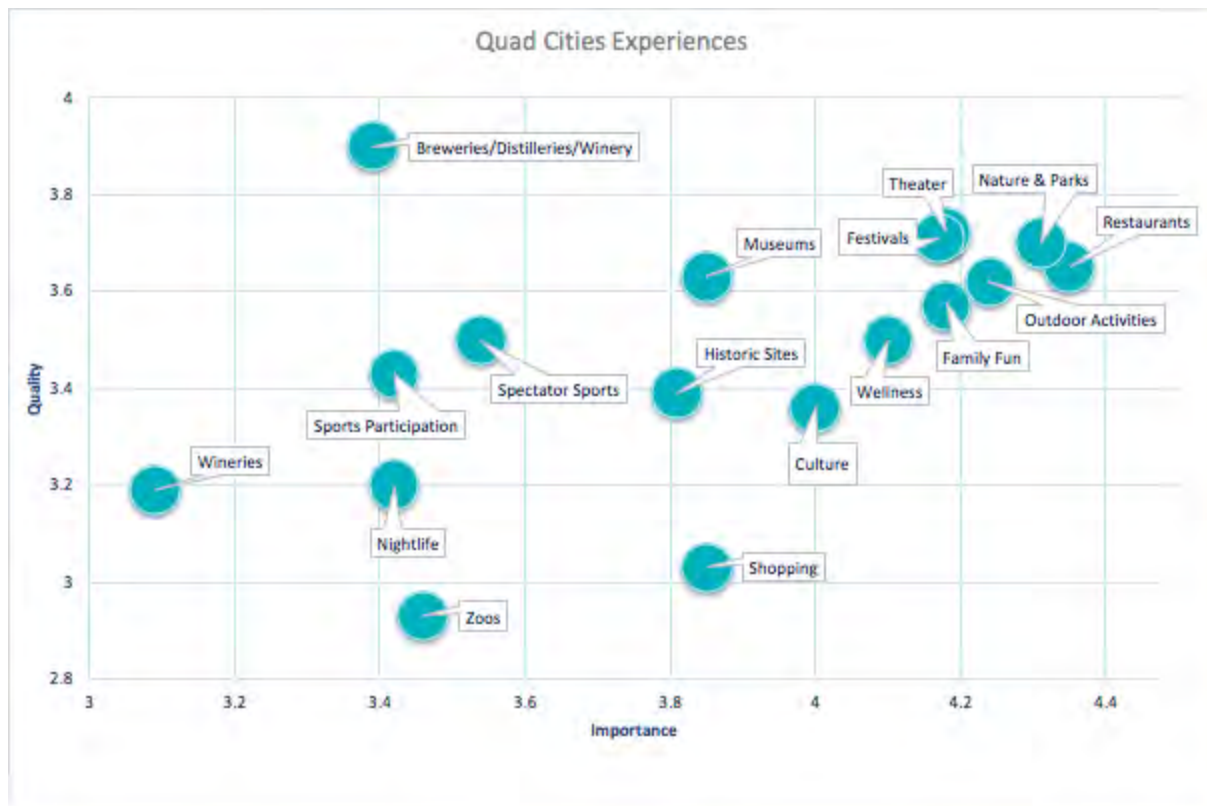


Q. How would you rate the overall quality of the following Quad Cities region experiences?



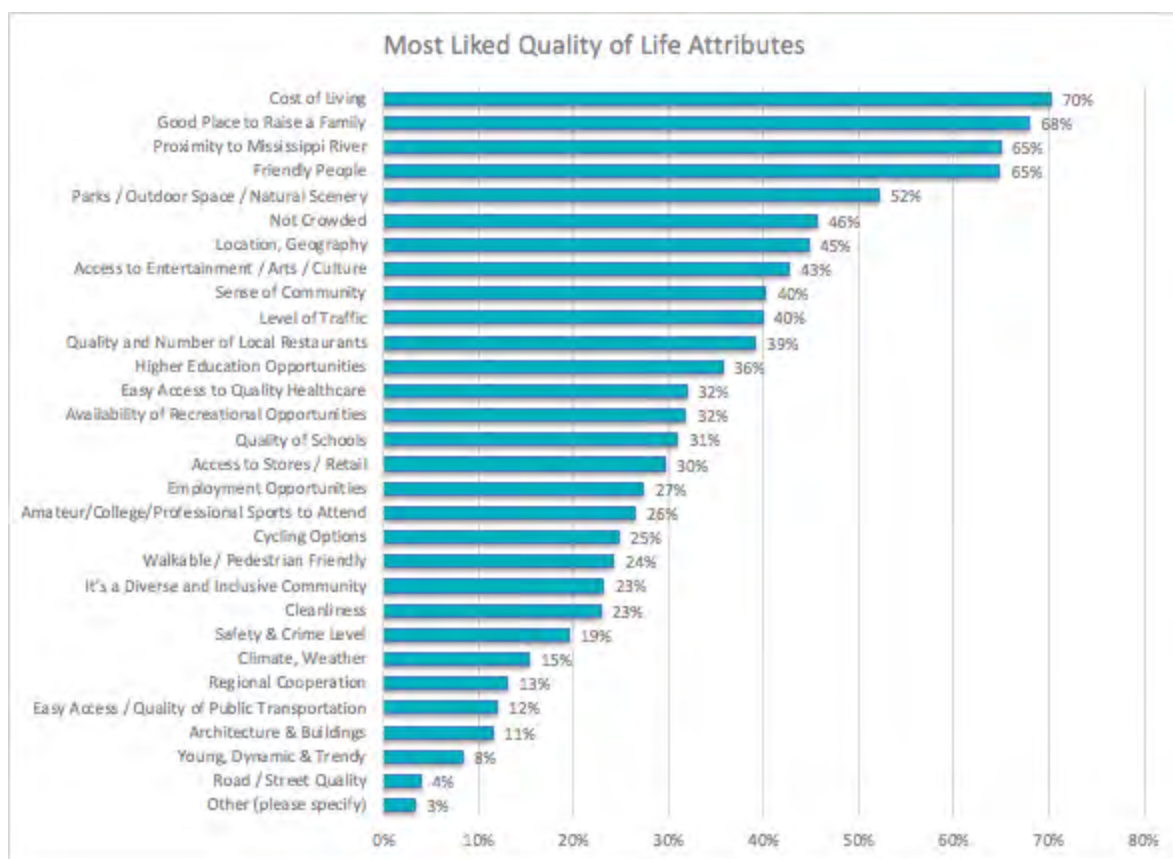
## QUAD CITIES EXPERIENCES COMBINED

The chart below shows the intersection of Quad Cities experiences in terms of importance and quality as rated by residents. Experiences in the upper-right quadrant were rated as important to local quality of life as well as quality experiences. Experiences in the lower-left quadrant were rated as less important to quality of life and of lesser quality.



## QUALITY OF LIFE ASPECTS (MOST LIKED)

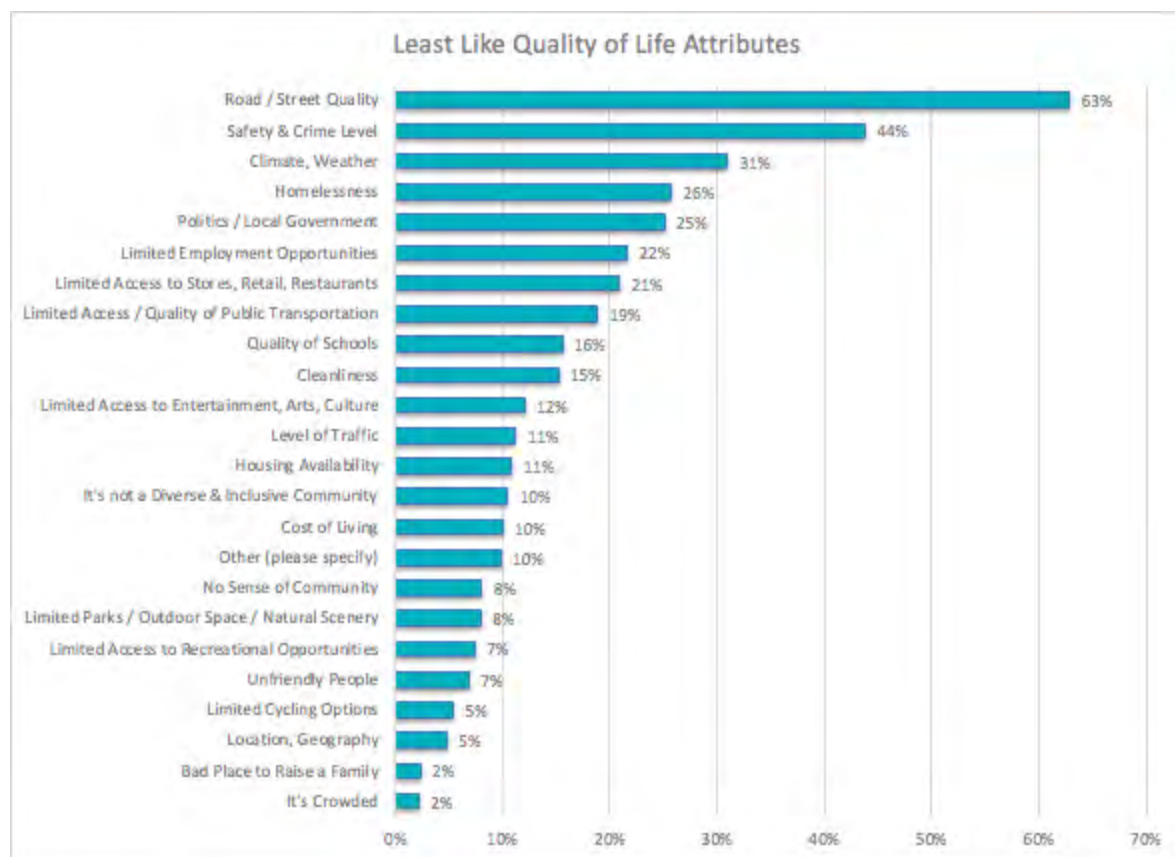
The cost of living was rated as the best thing about living in the Quad Cities by residents, followed by being a good place to raise a family, proximity to the Mississippi River and friendly people. Older residents were more likely to list proximity to the Mississippi River (76% vs 65%), friendly people (75% vs 65%) and access to quality healthcare (46% vs 32%) as the most liked aspects of living in the Quad Cities.



Q. What are the BEST things about living in the Quad Cities region? Select all that apply.

## QUALITY OF LIFE ASPECTS (LEAST LIKED)

Road/street quality, safety and crime levels and climate were listed as the least liked aspects of living in the Quad Cities. Younger residents (under 35) were more likely to list 'safety and crime levels' (52% vs 44%), 'cleanliness' (20% vs 15%), 'limited access to entertainment, arts and culture' (18% vs 12%), 'limited access to recreational opportunities' (12% vs 7%) and 'limited cycling options' (10% vs 5%) as a least liked aspect of living in the Quad Cities. Older residents (55 and above) were more likely to list 'politics/local government' (31% vs 25%) as a least liked aspect of living in the Quad Cities region.



Q. What do you like LEAST about the Quad Cities region? Select all that apply.





XXX RESONANCE

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