

NOVEMBER 18, 2019

VISIT QUAD CITIES

DESTINATION VISION
& STRATEGIC VISION

VISITOR
SURVEY



OVERVIEW

Understanding what visitors really want is crucial to any successful destination. But imagine if we could go a stage further; if as an industry we could discover what genuinely shapes travel experiences, or measure what travelers value most and in turn how their expectations could and should be better met.

During this foundational step of the Tourism Master Planning process, the goal is to identify and define the types of travelers who are attracted to the Quad Cities, what they value and how the region is delivering on their expectations. While desk research is valuable to paint a picture of a destination's broader market opportunities, primary research allows us to ask specific questions:

- Which aspects of the Quad Cities "experience" are important to you in deciding to visit the area?
- Which aspects of your visit were excellent or outstanding?
- Which aspects of your visit weren't so outstanding?
- How did your perception of the region change following your visit?

The answers to these questions help guide the planning, product development, programming, policy and promotion of the Quad Cities' tourism industry.

METHODOLOGY

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 previous visitors travel habits, preferences, and perceptions of the Quad Cities. 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 the demographic and psychographic characteristics of previous visitors to the Quad Cities;
- Conduct a segmentation analysis of respondents to better understand the Quad Cities visitor and how they differ from U.S. travelers in general;
- Identify the motivating factors that drove previous visitors to select the Quad Cities as their destination of choice;
- Assess the quality and satisfaction with current services, accommodation and amenities throughout the Quad Cities; and
- Assess previous visitor perceptions of the Quad Cities both before and after their visit.

More than 390 previous visitors to the Quad Cities participated in the survey.

SUMMARY

Visitors to the Quad Cities are coming to the region to experience its restaurants, nature and parks, festivals and events and historic sites and landmarks. These travelers, who are often repeat visitors, associate the region with the Mississippi River, John Deere, fun, shops and family. Visitors to the Quad Cities have a more positive perception of the destination after visiting the region than they did prior to visiting, an important outcome as perceived quality of place becomes increasingly important for tourism and economic development.

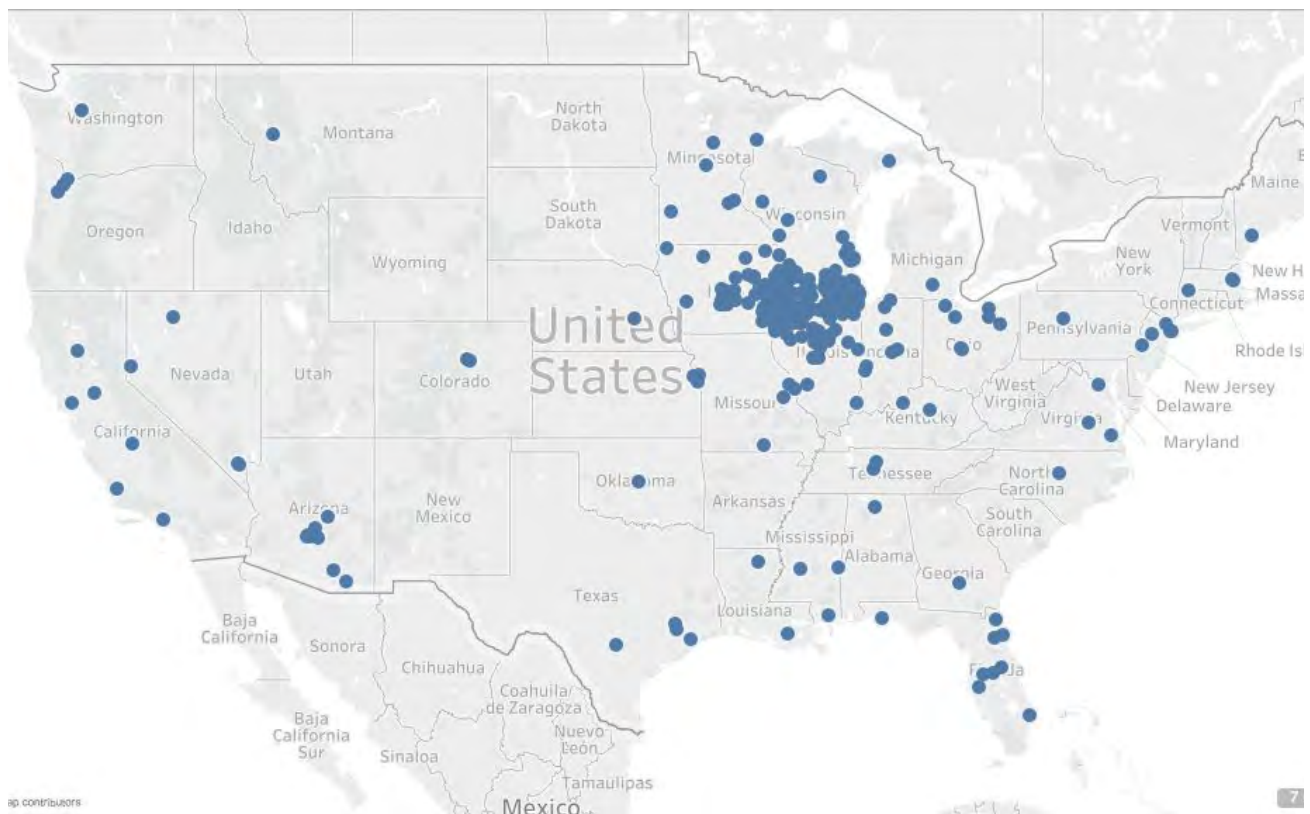
KEY FINDINGS

- Previous visitors to the Quad Cities are more likely to be Family-Oriented Frugals
- 38% of previous visitors traveled as a married couple, while roughly 20% traveled alone or as a family
- The top five words used to describe the Quad Cities were ‘river’, ‘Mississippi’, ‘fun’, ‘shops’ and ‘family’
- Roughly half of previous visitors said they had an “excellent” or “very good” perception of the Quad Cities prior to their visit. This number grew to nearly 70% for previous visitors following their visit
- Eight in ten previous visitors visited the city of Davenport and seven in ten visited Moline
- LeClaire was rated as the region with the highest quality visitor experience
- Restaurants, hotels, nature and parks, festivals and historic sites were the most important aspects of the Quad Cities experience in motivating previous visitors to select Quad Cities as a destination
- The top five words used to describe the positive aspects of their previous visit were ‘restaurant’, ‘river’, ‘city’, ‘food’ and ‘see’
- The top five words used to describe the negative aspects of their previous visit were ‘construction’, ‘none’, ‘traffic’, ‘road’ and ‘nothing’
- The majority of previous visitors view Quad Cities as a friendly destination and roughly half feel the destination is safe and clean. Only 23% of previous visitors rated Quad Cities positively for diversity and that number fell to one in ten for transit service.

DEMOGRAPHICS

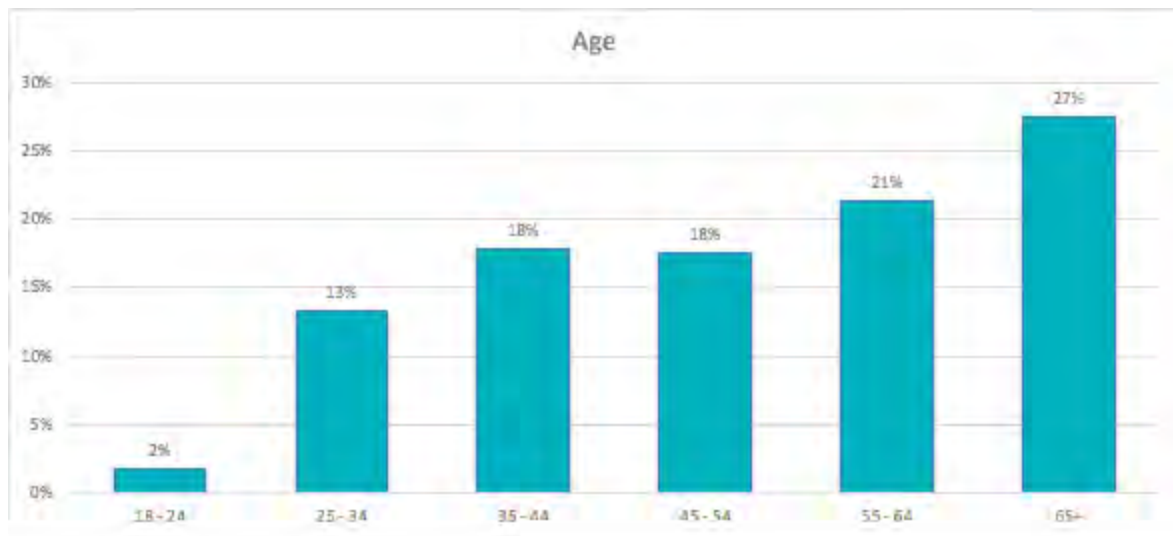
GEOGRAPHY

The majority of previous visitors are located in the Midwest Region and other drive markets.



AGE

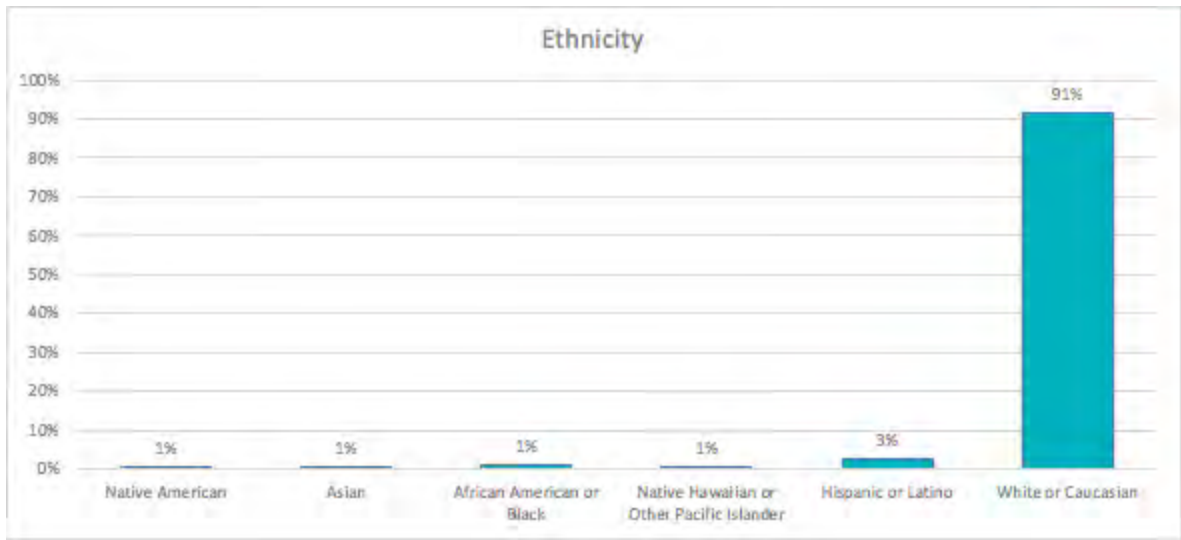
The age of respondents tended to skew slightly older with one-quarter of previous visitors being over the age of 65 and two in ten falling between the ages of 55-64. Roughly two in ten visitors fell into the age category of 35-44, while one in eight reported being 25-34 years of age.



Q. What is your age?

ETHNICITY

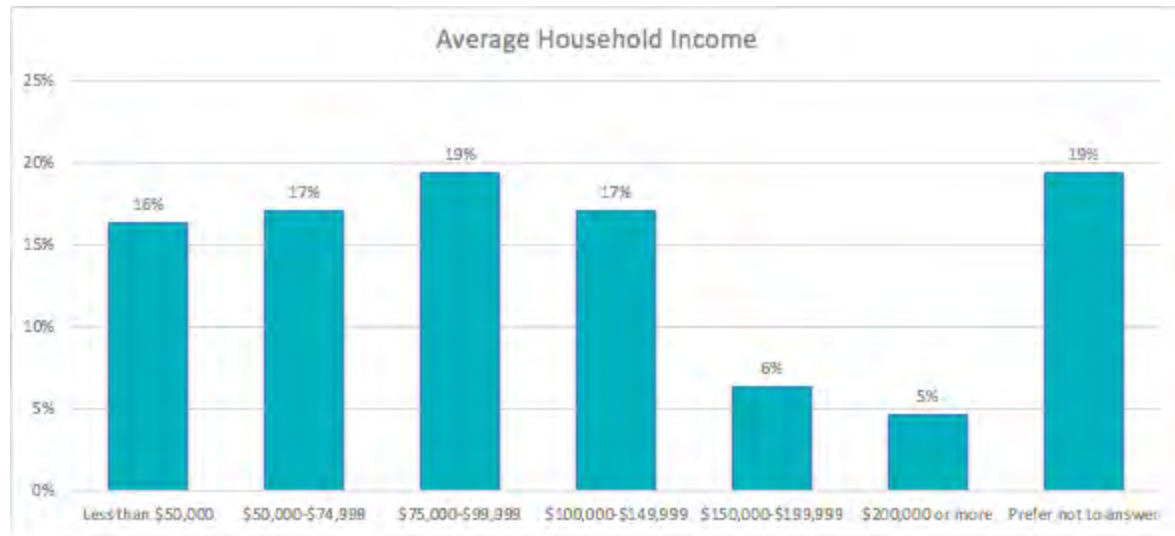
The vast majority of respondents, more than 90%, were white or caucasian.
Hispanic/Latino respondents made up the second largest group of respondents at 3%.



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)

ANNUAL HOUSEHOLD INCOME

Respondents from various income groups were well represented. Affluent travelers, those with household incomes greater than \$150,000, were the least likely to be represented.



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

MARKET SEGMENTATION

OVERVIEW

It's difficult to market to age groups on a generational basis because they're so big. More effective, then, is to identify psychographic segments, types of travelers who—regardless of age or gender—share similar travel, interests and spending patterns. By approaching marketing from a psychological profile, destinations can focus on developing products and types of marketing that appeal to these segments. Resonance surveys more than 4,000 active U.S. and Canadian travelers each year and has created a proprietary segmentation modeling tool that allows us to profile your database and conduct this segmentation analysis. The segmentation analysis used is both a behavioral and attitudinal segmentation. Three main inputs are used in our segmentation modeling:

1. Most important factors taken into account when deciding on a vacation destination;
2. Activities enjoyed while on vacation; and
3. General attitudes towards vacations

The resulting segmentation solution identifies five key segments of varying sizes with distinct behaviors and attitudes resulting in different demographic profiles and trip characteristics. Key segments of U.S. and Canadian travelers in our modeling are:

Infrequent Convenience Travelers: They take shorter, less frequent trips annually that are close to home. English spoken is important when choosing a vacation destination. These travelers are also less likely to participate in all vacation activities, except dining and fun attractions.

Active Adventurers: Active Adventurers are more likely than their counterparts to visit a beach resort, and they're more likely to travel greater distances to get to their destinations. But where this segment really stands out is in the activities they seek at their destinations. Slightly more male and slightly younger (46 years old, on average), with fewer families, they have a great interest in engaging with nature and participating in outdoor sports. This

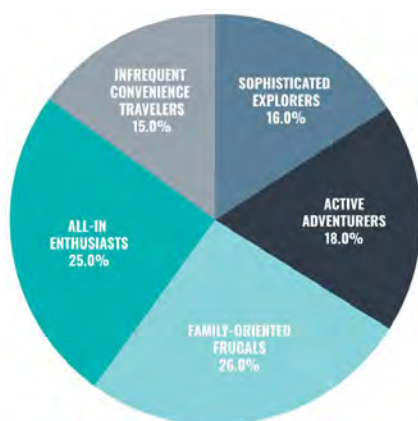
group doesn't see a vacation as a time to slow down or be indulgent. They want to explore new things and keep moving; health and fitness are important. A whopping 91% participate in outdoor sports while at their destination, versus 60% of average U.S. travelers.

Sophisticated Explorers: The driving force for Sophisticated Explorers is, well, exploring—specifically, exploring cultures and traditions at a destination. They prioritize sightseeing, visiting cultural attractions and learning new things more than other groups. This is, by a wide margin, their purpose for traveling, and statements that other travelers prioritize (for example, access to technology) are significantly less important to this segment. Compared to all groups, they conduct significantly more research prior to going on vacation. Slightly more female and slightly older, Sophisticated Explorers take fewer vacations per year, but do so to further-flung destinations—often traveling more than 1,000 miles—and often stay longer than eight days. Frequent travelers to Europe, the Caribbean, Mexico and to big cities, they're high spenders who are willing to pay for experiences.

Family-Oriented Frugals: Take fewer and shorter trips that are close to home. They show greater interest in family vacations with kids and multi-generational vacations compared to other segments. They also place greater importance on safety, cost, and favorable climate.

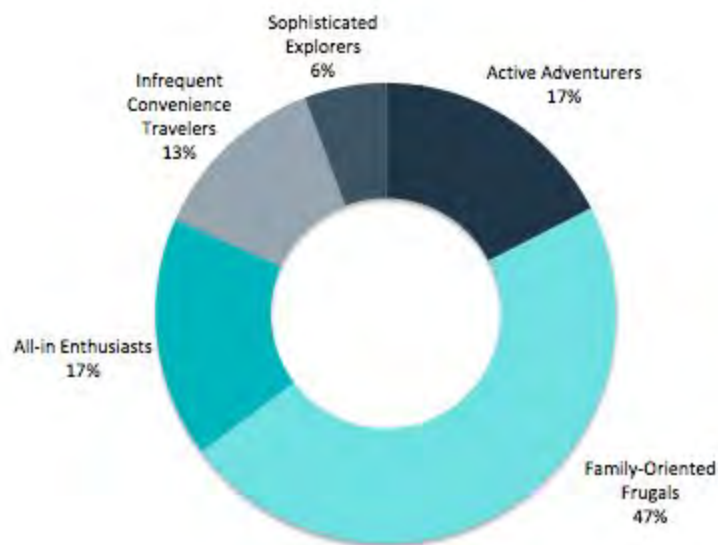
All-in Enthusiasts: This group is interested in taking most types of vacations. Everything is important to them when deciding on a vacation destination. They are more likely to participate in most types of activities and go on vacations for all the different reasons. From an age perspective, they skew younger than the other segments.

The following chart represents the approximate share each of these segments accounts for among all U.S. travelers.



To better understand who the current Quad Cities' customer is, how they compare to U.S. travelers in general and what types of travelers might be attracted to the destination in the future, we utilized the same methodology to analyze previous visitors to the Quad Cities.

Roughly half of previous visitors to the Quad Cities were Family-Oriented Frugals. One in six were Active Adventurers and one in six were All-In Enthusiasts. Roughly one in eight were Infrequent Convenience Travelers while one in twenty were Sophisticated Explorers.

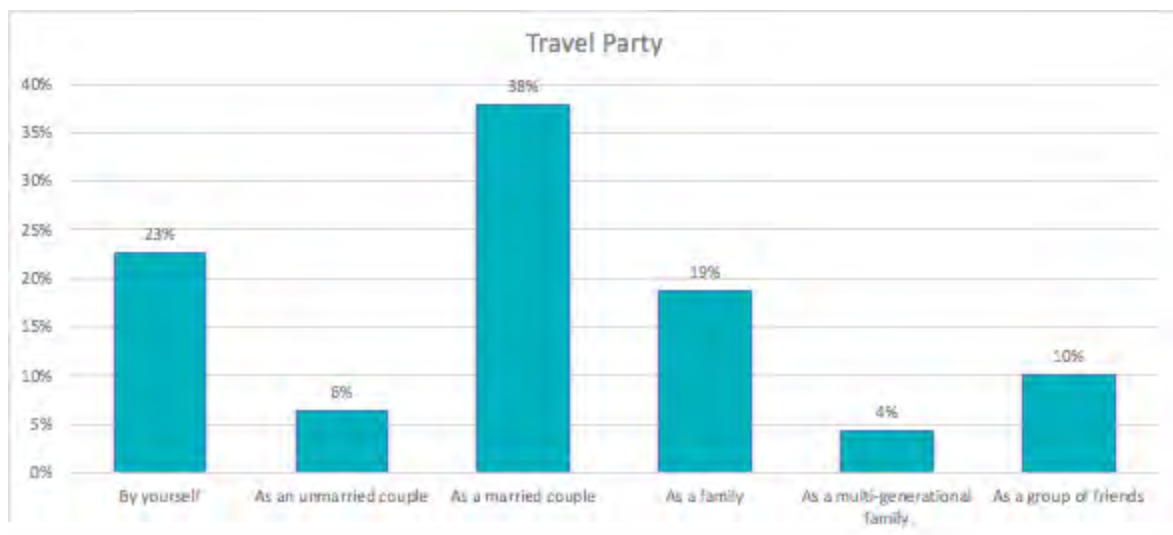


TRAVEL HABITS

TRAVEL PARTY

More than one-third of previous visitors traveled to the Quad Cities as a married couple, while roughly two in ten traveled alone or as a family. One in ten traveled to the Quad Cities with a group of friends.

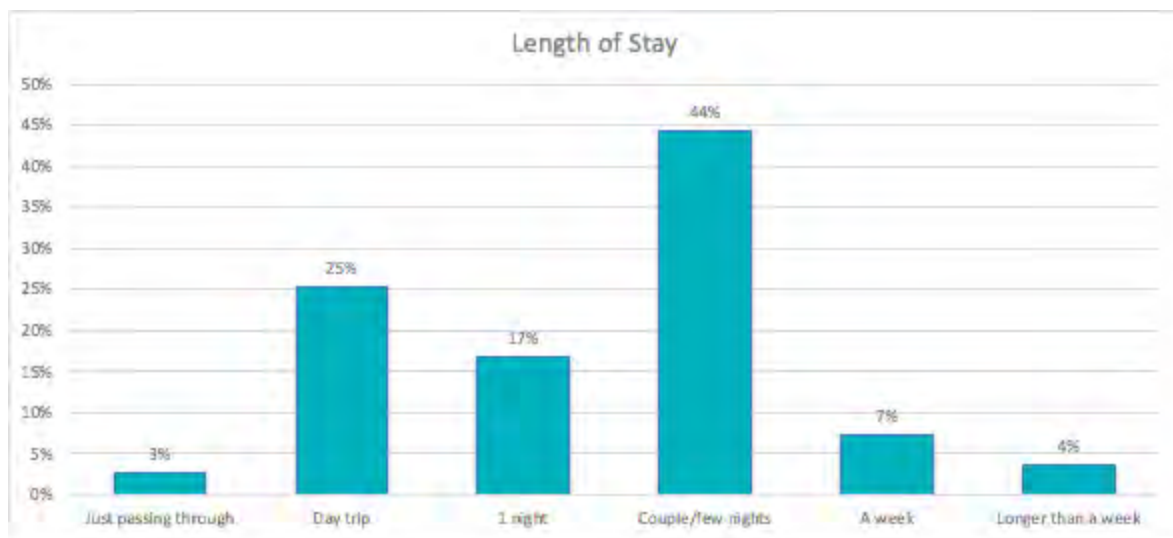
One-quarter of previous visitors came to the Quad Cities on their own. Solo travel is a growing trend in the broader travel industry, particularly amongst female travelers. Searches for "solo female travel" grew by 52% between 2016 and 2017, and 38% of those who have traveled solo will do so again according to research from Booking.com.



Q. Did you travel ...

LENGTH OF STAY

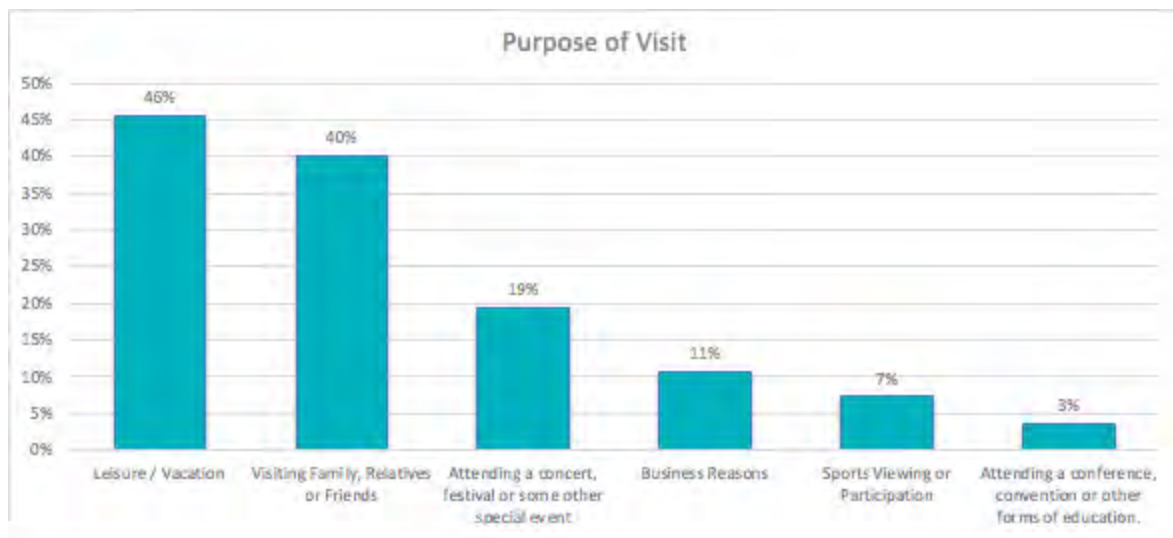
Roughly half of previous visitors indicated that they spent a couple/few nights in the Quad Cities on their most recent visit. One-quarter of previous visitors indicated their most recent visit was a day trip, while a similar percentage indicated they spent a week or more in the destination. Respondents who indicated the purpose of their trip was visiting friends and family were more likely to spend a week or more in the destination.



Q. How long did you stay in the Quad Cities on your last visit?

PURPOSE OF VISIT

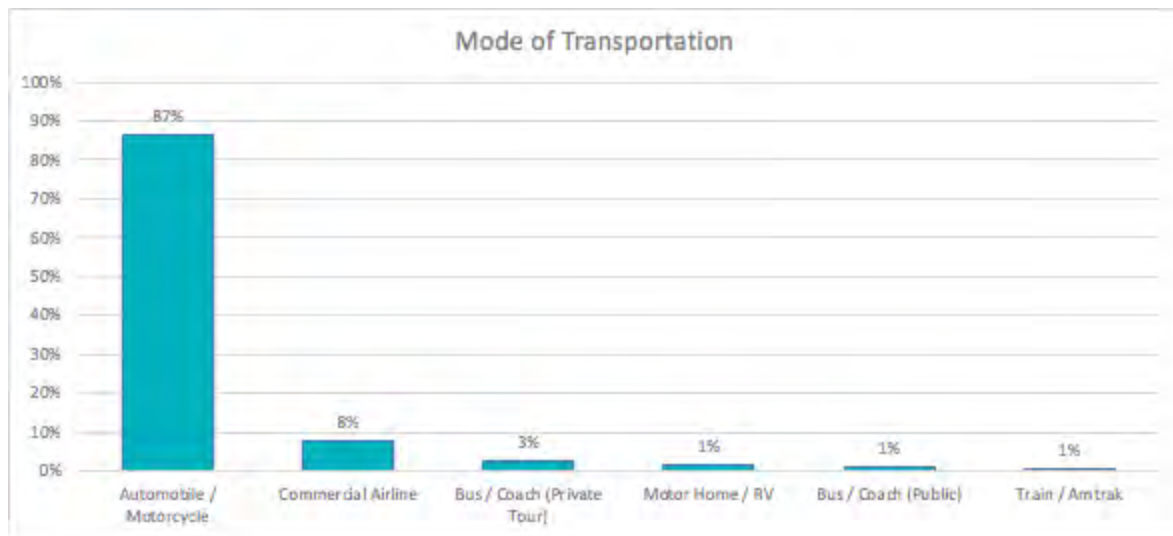
Leisure/vacation (46%) and visiting family, relatives or friends (40%) were the most common reasons for visiting the Quad Cities. Two in ten visitors to the Quad Cities came to attend a concert, festival or some other special event. Higher income travelers (HHI over \$150k) were more likely to travel for business reasons (24% vs 11%). It should be noted that this breakdown is representative of the respondent sample and may not be fully representative of actual visitation to the Quad Cities.



Q. What were the main reasons for your last visit to the Quad Cities? (check all that apply)

MODE OF TRANSPORTATION

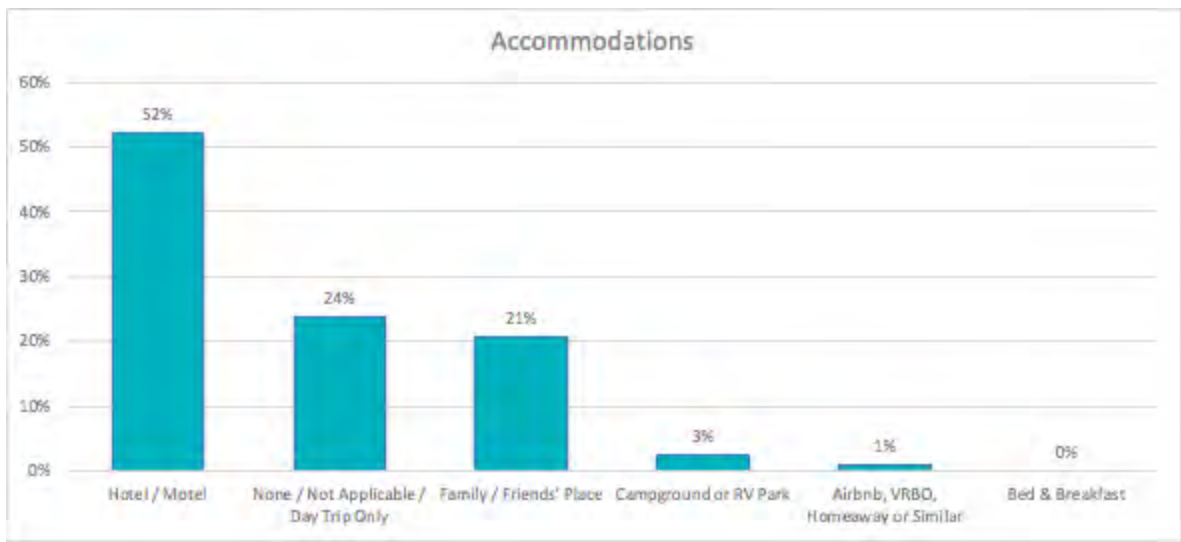
Nearly nine in ten previous visitors to the Quad Cities arrived via automobile or motorcycle, one in twelve arrived via commercial airline. Higher income visitors (HHI over \$150k) were more likely to travel via commercial airline (14% vs 8%).



Q. How did you get to the area?

ACCOMMODATIONS

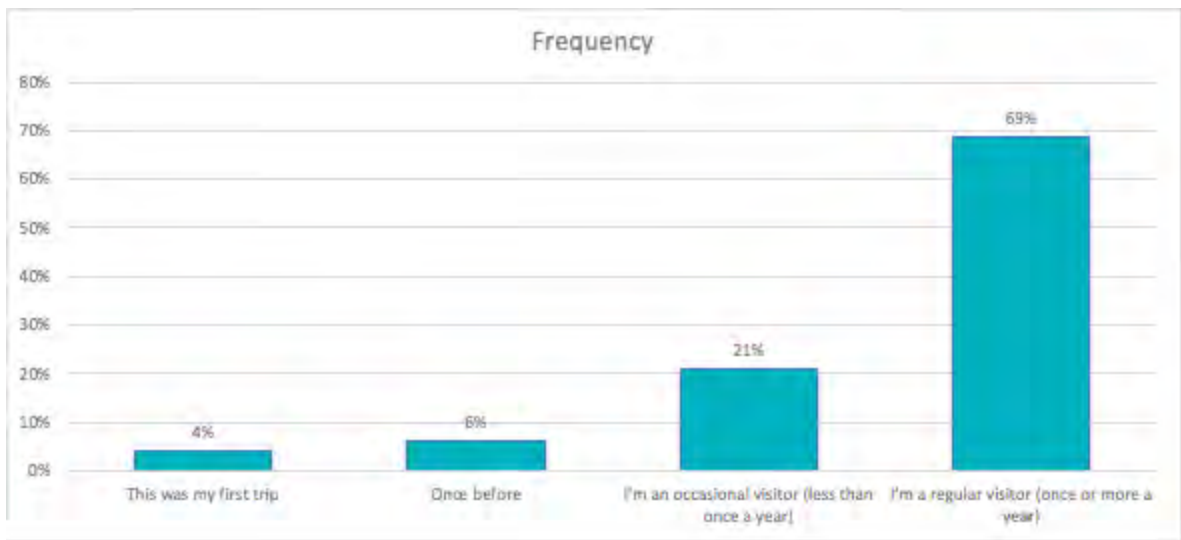
More than half of previous visitors stayed in a hotel/motel during their most recent visit to the Quad Cities. Roughly one in five stayed with friends or family, while less than 1% stayed in an Airbnb or similar.



Q. What kind of accommodation did you use during your visit?

FREQUENCY OF VISIT

Nearly 70% of previous visitors indicated they are regular visitors to the Quad Cities, while 21% indicated they visit the area occasionally (less than once a year). Approximately 4% of previous visitors said this was their first time in the Quad Cities. Attracting more first time visitors will be critical to the success of talent attraction and overall expansion of the Quad Cities brand awareness.



Q. How frequently do you come to the Quad Cities?

PERCEPTIONS OF QUAD CITIES

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 previous visitors were ‘river’, ‘Mississippi’, ‘fun’, ‘shops’, ‘family’, ‘casino’, ‘food’, ‘John Deere’, ‘home’ and ‘friendly.’ The word cloud below highlights the words given by previous visitors, 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 visitor responses.

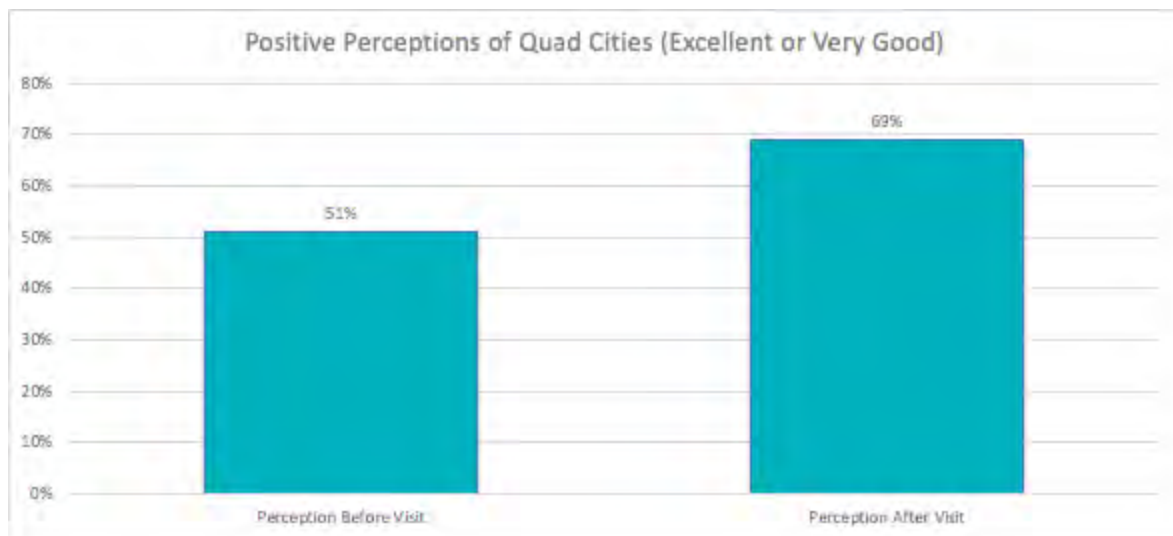


Q. What are the first three words or phrases that come to mind when you think of the Quad Cities?

PERCEPTION OF THE QUAD CITIES

Half of previous visitors indicated they had either an ‘excellent’ or ‘very good’ perception of the Quad Cities prior to their visit. This number grew to 69% following their time in the region. A deeper dive reveals that 14% of previous visitors had a ‘neutral’ perception of the Quad Cities prior to their visit and this number falls below 4% following their visit. On the other hand, roughly 15% of previous visitors had an ‘excellent’ perception of the region prior to their visit and this number climbs to 23% following their visit.

This insight reveals the potential for tourism to impact perception of a community. This is incredibly important, as increasingly reputation, identity and the perceived quality of place determine where talent, capital and tourism flow.



Q. On the whole, what was your perception of the Quad Cities?

POSITIVE ASPECTS OF QUAD CITIES EXPERIENCE

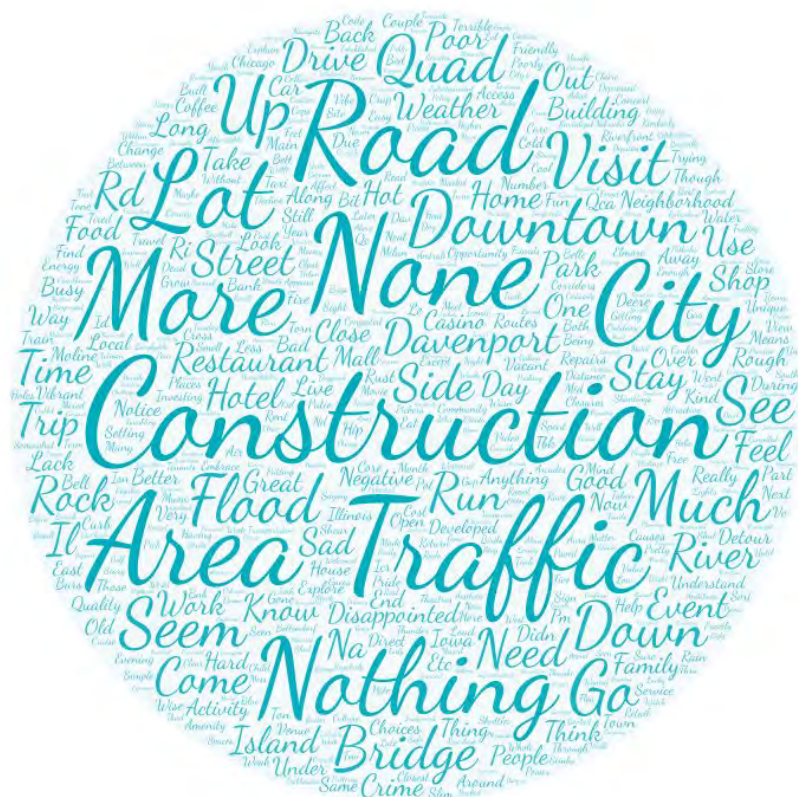
When asked what aspects of their most recent visit they found excellent, outstanding or liked the most, the most common responses from previous visitors were ‘restaurant’, ‘river’, ‘city’, ‘food’, ‘see’, ‘downtown’, ‘shop’, ‘museum’, ‘people’, ‘family’, ‘friendly’, ‘John Deere’ and ‘casino.’ The word cloud below highlights the words given by previous visitors, with the larger words being suggested more frequently.



Q. What aspects of your last visit did you find excellent, outstanding or like the most?

NEGATIVE ASPECTS OF THE QUAD CITIES EXPERIENCE

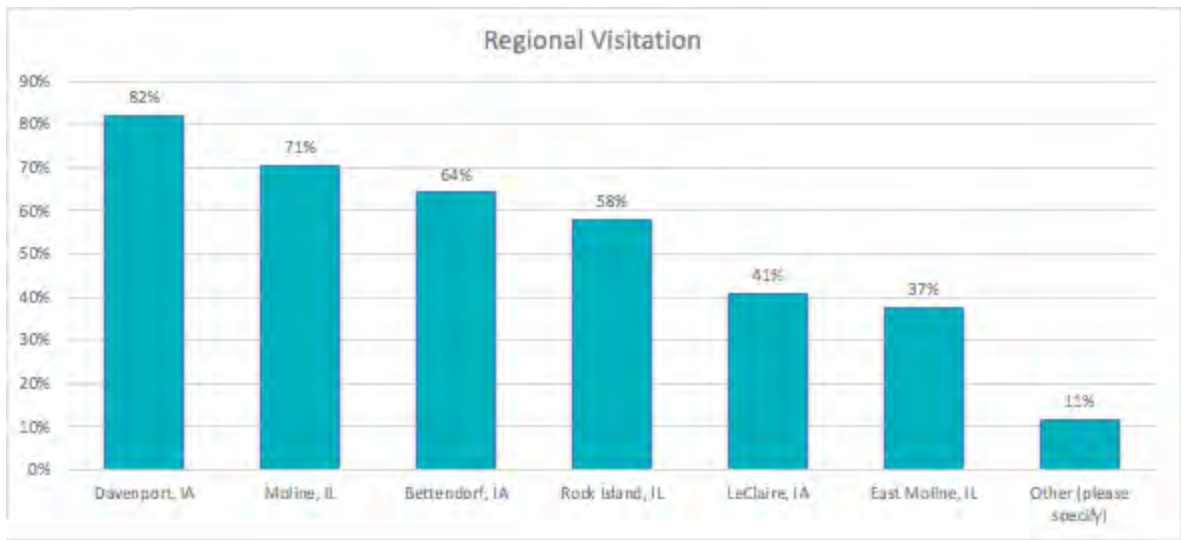
When asked what aspects of their most recent visit they found negative, disappointing or liked the least, the most common responses from previous visitors were ‘construction’, ‘none’, ‘traffic’, ‘road’, ‘nothing’, ‘area’, ‘downtown’, ‘bridge’, ‘Davenport’ and ‘flood.’ The words ‘area’ and ‘downtown’ were most commonly used when discussing parts of the region where the experience was lacking in terms of tourism product and safety. The word cloud below highlights the words given by previous visitors, with the larger words being suggested more frequently.



Q. What aspects of your last visit did you find negative, disappointing or like the least?

REGIONAL VISITATION

Eight in ten previous visitors visited Davenport, seven in ten visited Moline, while roughly six in ten visited Bettendorf and Rock Island. The least visited areas of the region were LeClaire and East Moline. The top responses under the category of “Other” were Milan, Coal Valley and Silvis.



Q. On all your visits to the Quad Cities, which of these specific areas did you visit? (check all that apply)

REGIONAL EXPERIENCE

Roughly eight in ten visitors indicated their experience was either ‘excellent’ or ‘very good’ in LeClaire, while two-thirds of visitors had an ‘excellent’ or ‘very good’ experience in Davenport and Bettendorf. Less than half of previous visitors indicated their experience in Rock Island and East Moline were ‘excellent’ or ‘very good’.

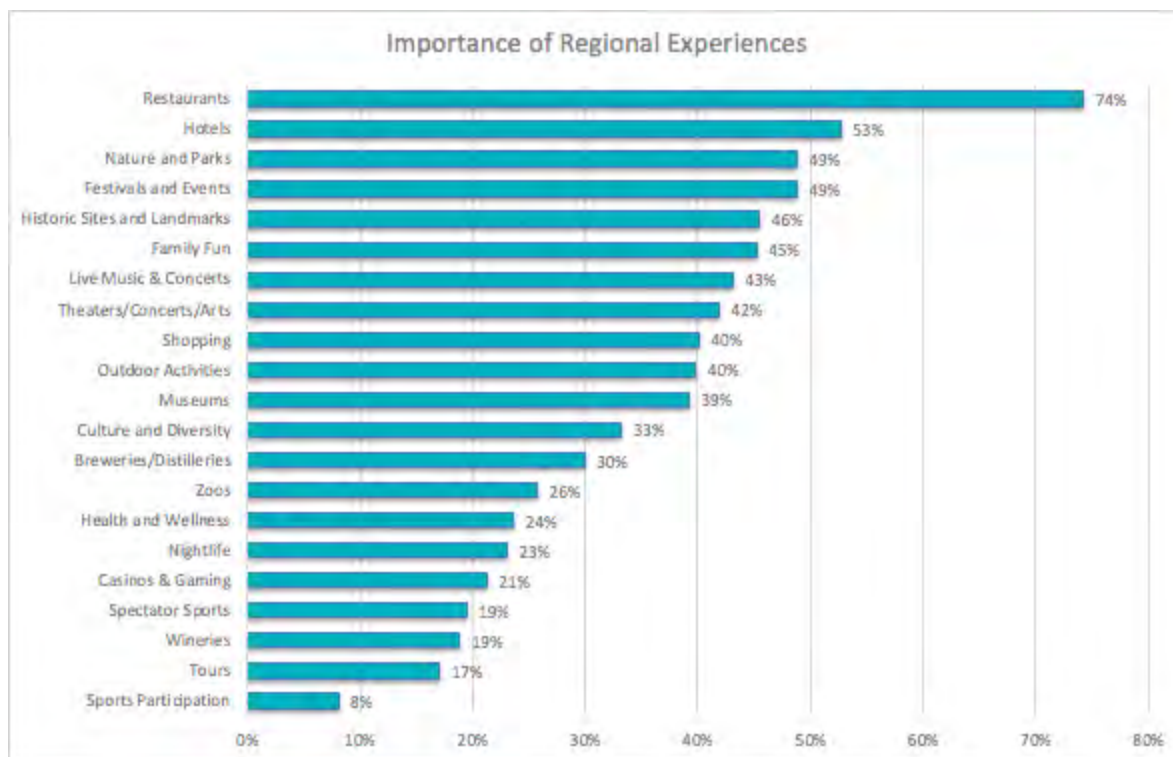


Q. On the whole, what was your perception of the areas you visited?

IMPORTANCE OF QUAD CITIES EXPERIENCES

Nearly three-quarters of previous visitors indicated that ‘restaurants’ were an important aspect of the Quad Cities experience when deciding to visit the destination. Roughly half indicated that ‘hotels’, ‘nature and parks’ and ‘festivals and events’ were important, while more than four in ten indicated ‘historic sites and landmarks’, ‘family fun’, ‘live music and concerts’ and ‘theater/concerts/arts’ were important. The least important aspects were ‘sports participation’, ‘tours’, ‘wineries’ and ‘spectator sports.’

Higher income visitors (over \$150k) were more likely to cite ‘restaurants’ (81% vs 74%), ‘historic sites and landmarks’ (57% vs 46%), ‘nature and parks’ (57% vs 49%) ‘live music and concerts’ (51% vs 43%), ‘outdoor activities’ (51% vs 40%) and ‘nightlife’ (43% vs 23%) as important.



Q. Which aspects of the Quad Cities "experience" were (are) important to you in deciding to visit the area?

QUALITY OF QUAD CITIES EXPERIENCES

Three-quarters of previous visitors indicated that ‘restaurants’ were high quality experiences in the Quad Cities. Roughly two-thirds indicated that ‘hotels’ were high quality, while more than half stated that ‘festivals and events’, ‘theater/concerts/arts’, ‘museums’ and ‘nature and parks’ were high quality experiences. The lowest quality aspects were ‘sports participation’, ‘tours’, ‘wineries’ and ‘health and wellness’.



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

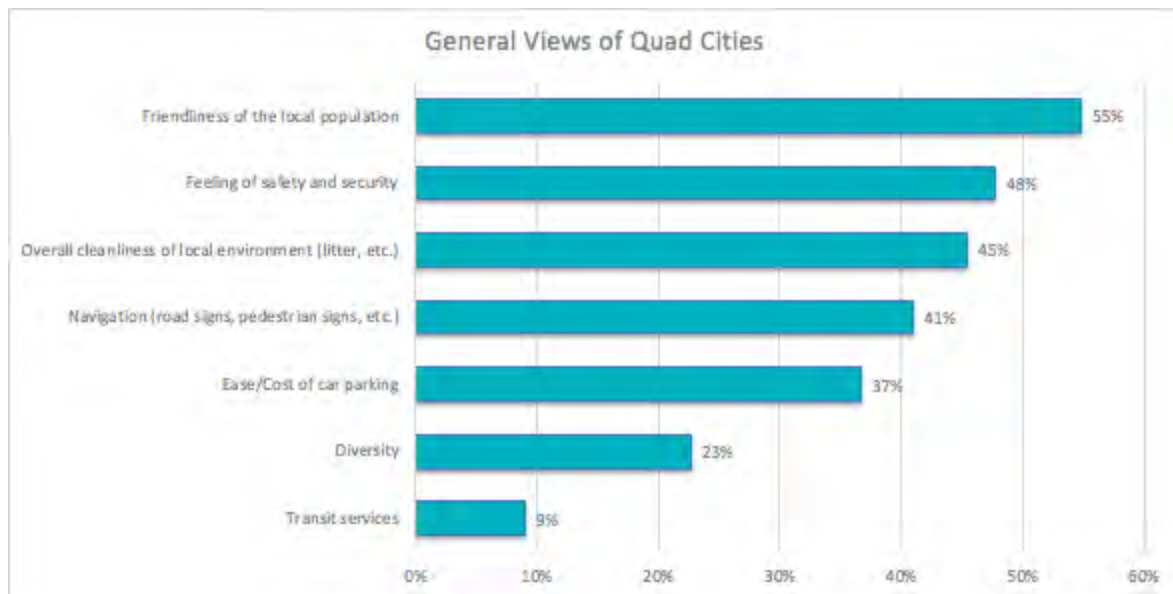
QUAD CITIES EXPERIENCE COMBINED

The chart below shows the intersection of Quad Cities experiences in terms of importance and quality as rated by previous visitors. Experiences in the upper-right quadrant were rated as important in the decision to visit the Quad Cities and as quality experiences. Experiences in the lower-left quadrant were rated as less important to the decision to visit the Quad Cities and of lesser quality.



PERCEPTIONS OF QUAD CITIES

The majority of previous visitors view Quad Cities as a friendly destination and roughly half feel the destination is safe and clean. Only 23% of previous visitors rated Quad Cities positively for diversity and that number fell to one in ten for transit services.



Q. Rate your views of the Quad Cities on:



XXX RESONANCE

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