

## Executive Summary (Interim Report – November, 2005)

### **Study Objective:**

The objectives of this study were to conduct scientific travel and tourism research to determine the effectiveness of current marketing initiatives of the Greater Saint Charles Convention and Visitors Bureau (GSCCVB) and to determine the most effective market positioning for the Greater Saint Charles area. The City of Saint Charles and the Saint Charles Convention and Visitors Bureau retained Randall Travel Marketing, Inc. (RTM) of Mooresville, North Carolina to conduct this study.

### **Study Methodology:**

Research was conducted for the Greater Saint Charles, Missouri area beginning in March 2005 and the final report will be completed in June of 2006.

#### **1. Stakeholder Input Meeting:**

A meeting was held in Saint Charles on March 22, 2005. Participants invited to the meeting included retailers, hoteliers, attraction managers, and other tourism entities. The purpose of this meeting was to review the RTM research project and to gather input.

#### **2. Reconnaissance:**

The RTM team is familiar with the Greater Saint Charles area having visited several times over the last few years. Specific site visitation and reconnaissance of the Greater Saint Charles area was conducted during the following dates:

∑ June 1 - 5, 2005

∑ July 19 - 23, 2005

∑ October 20 - 23, 2005

∑ NOTE: Additionally Saint Charles area will be visited during 2006.

#### **3. Lodging Property Interviews and Fax Survey:**

A survey was sent to every hotel, motel and inn located in the Greater Saint Charles area. Thirteen (13) lodging properties representing 1,001 of the 1,719 lodging rooms included in the survey responded representing an excellent 58% response rate. This can also be interpreted to mean that a good cross section of the geographic locations and types of lodging within Greater Saint Charles participated in this study. Two lodging properties, the Embassy Suites (296 rooms) and the Country Inn and Suites (86 rooms) did not participate in the study as they were newly opened and did not have adequate historical data. In addition, the RTM team obtained the local lodging data submitted to Smith Travel Research and compared it to the data collected as part of this study.

#### **4. Visitor Profile and Conversion Mail Survey – Random Sample of Inquiries:**

The GSCCVB provided RTM with the total inquiries received and fulfilled by the GSCCVB during a twelve-month period. A random sample was selected and was stratified by the time of year the inquiry was received during the twelve-month period and by the inquiry source. Two thousand (2,000) surveys were mailed the week of August 15, 2005. A total of 348 surveys had been received by September 28, 2005, representing 17.40% response rate which is better than the expected acceptable response range of 10% to 15%.

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### **5. Intercept Interviews with Visitors to Saint Charles:**

Quarterly intercept interviews were conducted as part of this study, and will continue to be conducted each of four quarters in order to establish perceptions of actual visitors over a one year period. One hundred seventy (170) intercept interviews were targeted for collection in each of the intercept periods. The time periods covered by intercept interviews include:

∑ 3Q '05: July 19-13, 2005	∑ 1Q '06: Feb. 8-11, 2006
∑ 4Q '05: Oct. 20-23, 2005	∑ 2Q '06: May 10-13, 2006

The intercept locations include hotels, Main Street Saint Charles retail shops, restaurants, attractions, Bed & Breakfast Inns, and other appropriate locations where business, meeting and leisure travelers might be found.

### **6. Meeting Planner Interviews:**

A list was obtained from the GSCCVB containing forty (40) meeting/convention planning decision makers who had held meetings in Saint Charles and forty (40) who had been targeted but chose not to have meetings in Saint Charles.

### **7. Performance Audit:**

RTM conducted an in-depth performance audit and analysis of the GSCCVB. This included documentation and analysis of the organization's governance, mission statement, funding, staffing, budget allocation, results measures, and program performance.

### **8. State, Regional and National Data:**

Travel research data from the State of Missouri was obtained and analyzed as part of this study. Regional and national travel databases were also studied.

### **9. Marketing Materials Evaluation:**

Marketing materials, including brochures and advertising, were obtained from GSCCVB. Those materials were evaluated based on research findings and the marketing experience of the RTM team.

### **10. Report and Recommendations:**

Based on the research findings, a report was written and presented to the Greater Saint Charles community and leadership.

### **Saint Charles Lodging Report**

There are currently a total of eighteen (18) hotel/motel lodging properties and twenty-one (21) Bed & Breakfast Inns actively collecting the local lodging tax in the Greater Saint Charles area. For this study's purpose, only sixteen of the hotel/motel properties (1,589 rooms) were contacted to participate, as two of the properties had opened as recently as July and August, 2005 and would not have 2004 sufficient data required. These two properties are the Embassy Suites (296 rooms) and the Country Inn & Suites (86 rooms). With the addition of these two new properties, the eighteen hotel/motel properties in Saint Charles now have a total of 1,971 rooms. Sixteen (16) of the lodging properties are franchised through national chains; two (2) are locally owned. All twenty-one (21) of the Bed & Breakfast Inns in the county were contacted and four (4) properties in the city of Saint Charles responded.

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**Five-Year Annual Occupancy Trends**

<b>Year</b>	<b>Saint Charles, Missouri STR</b>	<b>% of Change</b>	<b>National STR</b>	<b>% of Change</b>
2000	60.0%	%	63.7%	
2001	61.0%	+1.6%	60.3%	- 5.3%
2002	59.8%	-2.0%	59.1%	-2.0%
2003	61.7%	+3.2%	59.2%	+ .01%
2004	63.0%	+2.1%	61.3%	+3.5%

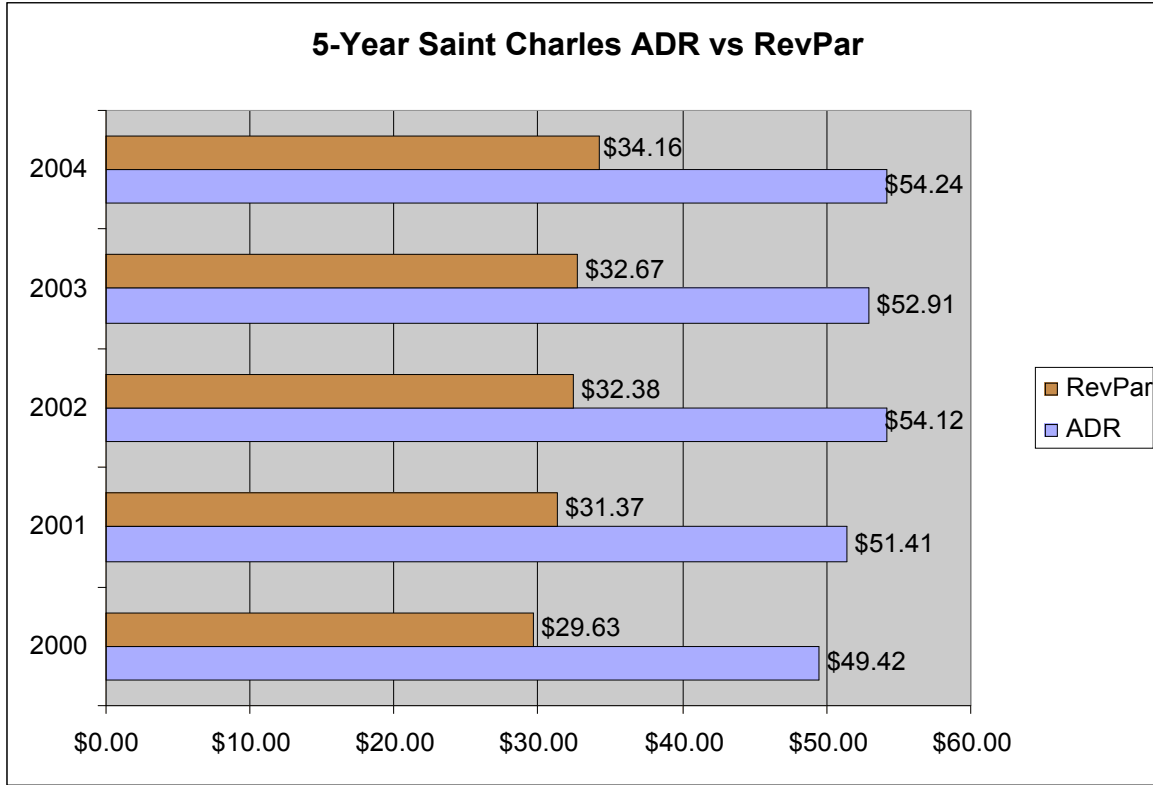
(Source: Smith Travel Research)

**Annual Overall Lodging Market Mix**

<b>2004</b>	<b>Category</b>
<b>62.33%</b>	<b><i>TOTAL LODGING RESPONSE RATE</i></b>
22.23%	Leisure – Tourists (visiting local attractions, historic sites, shopping, etc.)
19.64%	Individual Corporate/Business
13.69%	Transient – Pass Through on Interstate
9.20%	Leisure – Visiting Friends & Relatives
7.19%	Convention/Meeting/Group – Corporate
5.59%	Wedding/Reunions/Family Events
5.11%	Convention/Meeting/Group – SMERF
4.24%	Convention/Meeting/Group – Sports
3.65%	Convention/Meeting/Group – Government
2.73%	Gaming
2.45%	Other
2.21%	Group Tour/Motorcoach
1.11%	University-Related
0.93%	Convention/Meeting/Group – Association
0.03%	Golf Package or Golf Group

(Source: RTM Saint Charles, Missouri Lodging Survey)

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(Source: Smith Travel Research STR report)

<u>Category</u>	<u>Spending by Age Group</u>			
	<u>Overall Amount</u>	<u>39 under</u>	<u>40 – 59</u>	<u>60 above</u>
<b>1. Lodging</b>	\$109.25	\$187	\$174	\$158
<b>2. Shopping</b>	\$82.53	\$149	\$145	\$98
<b>3. Attractions / amusements</b>	\$62.01	\$89	\$110	\$79
<b>4. Food / meals</b>	\$60.16	\$99	\$97	\$91
<b>5. Transportation</b>	\$39.58	\$51	\$61	\$68
<b>Average Daily Expense</b>	<b>\$353.53</b>	<b>\$489</b>	<b>\$525</b>	<b>\$421</b>

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**Sources of Information Used for Trip Planning**

	<b>Response by Age Groups</b>		
	<b>Total</b>	<b>Under 49</b>	<b>Over 50</b>
<b>Guides – Saint Charles visitor guide</b>	<b>34.20%</b>	<b>25.4%</b>	<b>45.2%</b>
<b>Guides – Missouri state travel guide</b>	<b>29.60%</b>	<b>24.6%</b>	<b>38.8%</b>
<b>Internet – Saint Charles tourism website</b>	<b>18.68%</b>	<b>18.4%</b>	<b>21.3%</b>
<b>Guides – AAA Tour Book</b>	<b>17.24%</b>	<b>20.2%</b>	<b>25.5%</b>
<b>Other – specify</b>	<b>15.80%</b>	<b>13.2%</b>	<b>24.5%</b>
Newspapers – Travel feature stories	15.52%	15.8%	22.3%
Newspapers – Newspaper ad or insert (specify newspaper)	14.66%	10.5%	17.0%
Internet – Missouri tourism web site	12.93%	12.3%	11.7%
Ads – Midwest Living	12.93%	12.3%	16.5%
Ads – AAA Home & Away	10.34%	11.4%	14.9%

**Which of the following would you like to see added in Saint Charles?**

<b>Shops open in the evenings in historic district</b>	<b>50.00%</b>
<b>Guided river excursions</b>	<b>41.95%</b>
<b>More places to sit &amp; rest in historic district</b>	<b>38.22%</b>
<b>A craft / artisan co-op featuring hand-made items- historic district</b>	<b>37.36%</b>
Downtown trolleys	35.06%
Live music in historic district while you are shopping	33.62%
Water taxi connecting sites on river	29.89%
More variety of shop goods in historic district	27.87%
More fine dining	19.54%
Upscale historic district lodging	16.95%

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<b>Respondent Profile and Responses</b>	<b>2005 Mail Survey</b>		
<b>Demographics:</b>			
Average Age	54.91		
Gender: Male / Female	Male=38.86% / Female=61.14%		
Occupation	Retired, Management, Homemaker		
Point of Origin	MO, IL, IN, KS, IA,		
<b>Generations:</b>			
War Generation (80+)	2.13%		
Silent Gen. (62-79)	31.61%		
Baby Boomer (44-61)	48.33%		
GenX (23-43)	17.93%		
GenY (4-22)	0.00%		
<b>Characteristics:</b>			
Travel party	81.77% adults		
Trip planning	28.4% = 1 week or less 10.5% = 2 weeks or less 26.9%= 1 month or less		
Average stay length	1.54 nights		
Hotel/motel or rental house	67.42%=hotel/motel 7.87%=B&B 9.55%=F&F		
Auto trip or fly/drive	88.83%=auto / 5.34%=fly/auto		
Conversion	65.44%		
Repeat visit conversion	76.39%=Previous		
First visit conversion	53.54%=First time		
Overall satisfaction	4.42		
<b>Satisfaction Ratings</b>	<b>Average</b>	<b>49 &amp; Under</b>	<b>50 &amp; Over</b>
Overall appeal of attractions	4.33	4.35	4.38
Variety of shops & merchandise in hist. dist.	4.16	4.03	4.24
Choices for dining	4.11	4.17	4.15
Quality of lodging rooms	4.02	3.98	4.10
Ease of finding visitor information	3.99	3.98	4.10
Signage and Wayfinding	3.97	4.03	4.02
Lodging value for price paid	3.89	3.98	3.90
Level of service / employee training	3.89	3.86	3.98
Merchandise prices in historic district	3.60	3.68	3.62
Convenience of shop hours in hist. district	3.59	3.45	3.59
<b>Primary Trip Purpose:</b>			
Vacation/getaway	30.7%	31.4%	30.7%
Shop in historic district	24.2%	17.1%	26.7%
Attend an event/festival	15.3%	11.4%	16.7%
Shopping	14.4%	12.9%	15.3%
Visit friends & relatives	13.0%	8.6%	11.3%
Day trip	13.0%	5.7%	13.3%
Visit historic sites	10.7%	8.6%	11.3%
Gaming	7.9%	7.1%	9.3%
KATY Trail	5.1%	7.1%	6.0%

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Respondent Profile and Responses	2005 Mail Survey		
<b>How Important?</b>	<b>Overall</b>	<b>49 &amp; Under</b>	<b>50 &amp; Over</b>
Time/spouse/family	4.37	4.51	4.36
Shopping/dining in historic district	4.20	3.94	4.31
Time with friends	3.44	3.38	3.44
Museums and cultural / historic sites	3.39	3.08	3.50
Resting, relaxing, doing nothing	3.24	3.38	3.19
Outdoor recreation	2.19	2.30	2.11
<b>Activities</b>	<b>Overall</b>	<b>49 &amp; Under</b>	<b>50 &amp; Over</b>
Dining	88.9%	88.5%	88.1%
Shopping	73.1%	68.1%	74.5%
Driving/sightseeing	63.9%	62.3%	62.3%
Visit historic site/home	43.5%	42.0%	48.3%
Visit a museum	34.7%	35.8%	34.8%
Gaming	33.3%	34.8%	35.1%
Attend a festival	28.2%	21.7%	27.8%
Sleep late / nap / rest	22.7%	20.3%	22.5%
Visit a winery	19.4%	15.9%	18.5%
Hiking	9.7%	14.5%	9.3%
Attend a cultural event	9.7%	10.1%	9.9%
Cycling	8.3%	17.4%	8.6%
Visit St. Louis			62.16% = Yes
Outdoor recreation			82.99% = No

**Liked most:** Shopping, restaurants, friendly people, historic ambience

**Liked Least:** Parking, traffic, shops closed in evening, more variety of shops

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### **GSCCVB Mission, Objectives and Organization**

Saint Charles was a tourism destination before Lewis and Clark purchased their last provisions here and started on their westward journey. Thus, the destination has a history of providing hospitality to travelers that precedes statehood. This legacy of welcoming visitors has continued down through ages.

Marketing tourism in Saint Charles gained momentum as a volunteer effort in the second half of the twentieth century when a tourism bureau was formed sometime after 1960. The Greater Saint Charles Convention and Visitors Bureau was established by state and city legislation and was enacted in the City Code of 1981. Amendments to the code have been made at various times since 1988, with the most recent amendments made March 29, 2005.

The current mission statement of the Greater Saint Charles Convention and Visitors Bureau is: "To develop and promote the hospitality industry in the Greater Saint Charles area, and to encourage economic growth by providing quality service to the visitor and convention delegate."

The Greater Saint Charles CVB is governed by city ordinances as a functioning part of city government and therefore does not have by-laws. The current city ordinance allows for an eleven (11) member tourism commission known as the Greater Saint Charles Convention and Visitors Commission. Except as otherwise noted, the commission members shall be appointed by the Mayor with the consent of the City Council.

The commission must be appointed to meet the following criteria: 1) President of the Saint Charles Chamber of Commerce; 2) one restaurant industry representative; 3) one South Main Historical District representative (recommended by the South Main Preservation Society); 4) one Historic Downtown representative; 5) one Frenchtown Historical District representative; 6) one cultural, educational or historic venues representative; 7) one gaming representative; 8) one city council member; 9) the mayor; 10) one lodging representative; 11) the city administrator; 12) one non-voting member to serve for life as Emeritus Chairperson. Members serve three year terms with the exception of the Chamber President, the Mayor, the City Administrator and the City Council Person, all of whom serve as long as they remain in those offices.

The chart on the following page outlines the current Convention and Visitors Commission members.

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**2005 Saint Charles Convention and Visitors Commission**

	<b><u>Name</u></b>	<b><u>Term Expires</u></b>	<b><u>Representing</u></b>	<b><u>Occupation</u></b>
Chair	Terry Jones	4/2008	Restaurant	Wiliker's Restaurant
V. Chair	Brian Hill	4/2006	North Main Rep.	Captivations
S/T	Charlise Floyd	4/2008	Cultural, Educational, Historic Representative	Lindenwood University
	Lisa Coleman	4/2006	Frenchtown Representative	
	<i>Bonnie Felton</i>		<i>Gaming</i>	<i>Ameristar Casino</i>
	<i>4/2007</i>		<i>Representative</i>	
	<i>Timothy Sawyer</i>		<i>South Main</i>	
	<i>4/2007</i>		<i>Representative</i>	
	<i>James Vavek</i>		<i>Lodging</i>	<i>Hampton Inn</i>
	<i>4/2008</i>		<i>Representative</i>	
	<i>Patricia M. York</i>		<i>Mayor</i>	
	<i>Rory Riddler</i>		<i>City Council Chair</i>	
	<i>Dr. Allan Williams</i>		<i>City Administrator</i>	
	<i>Scott Tate</i>		<i>Chamber of</i>	<i>President</i>
	<i>4/2007</i>		<i>Commerce</i>	
	<i>Ray Harmon</i>		<i>Emeritus Chairperson</i>	
	<i>Lifetime</i>			

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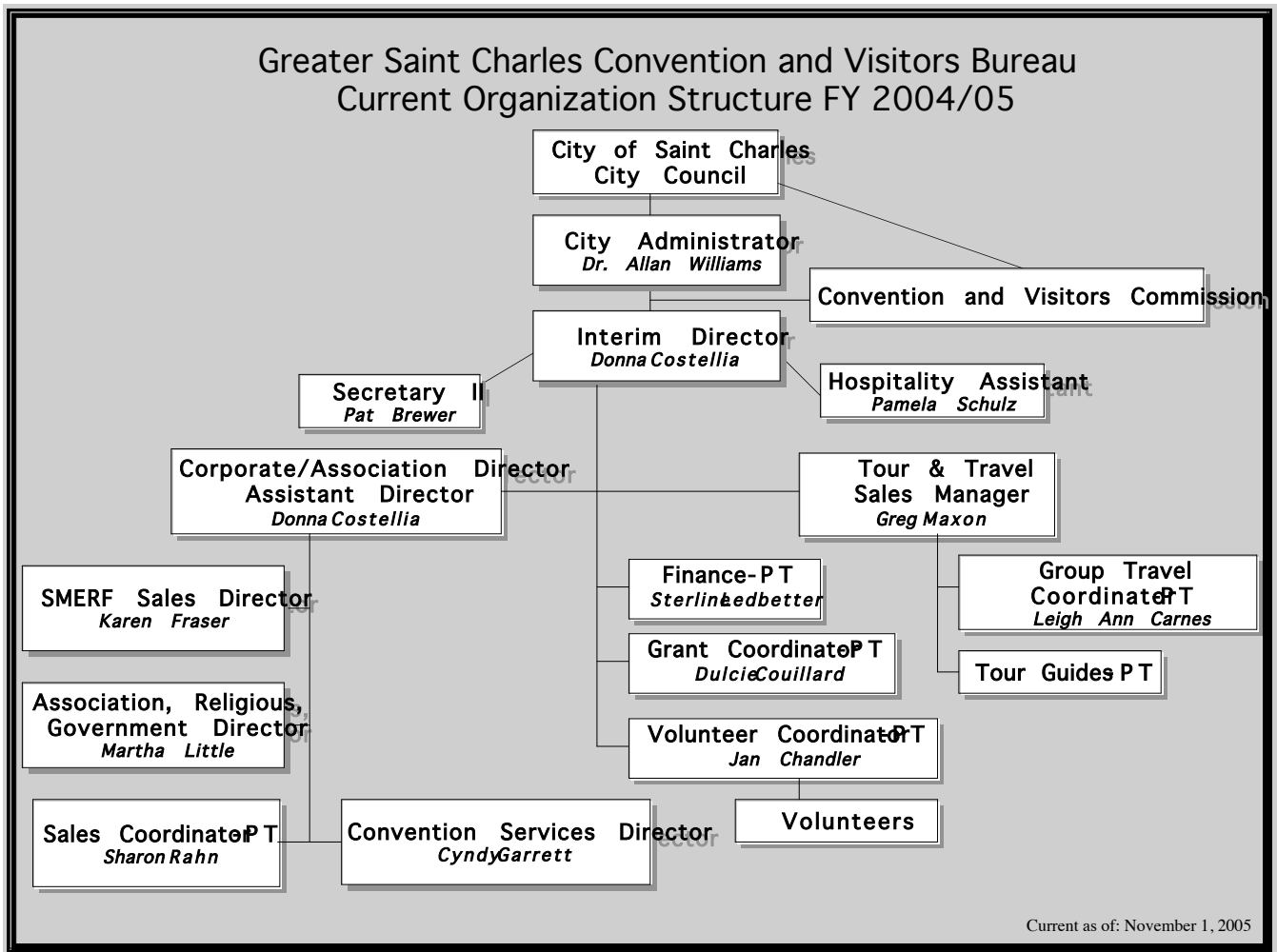
RTM recommends that all tourism boards have a majority of members directly employed in the local travel industry. Those whose livelihoods are dependent upon the health of an industry can be expected to ensure good stewardship. Also, RTM recommends having several business community leaders on the board to ensure strong business practices are followed and to ensure the work of the CVB is an asset to the entire community. Here we see a committee of eleven (11) voting members with one non-voting Emeritus Chairperson. The Chairperson as the eleventh seat only votes to break a tie. As a rule, RTM recommends that one-fourth of a tourism board come from lodging, one-fourth from attractions, one-fourth from restaurants/retail, and one-fourth from the civic/business leadership of the destination jurisdiction.

### **Greater Saint Charles Area Convention and Visitors Bureau Staff**

Donna Costellia	Interim Director	December, 1984
Sterline Ledbetter	Finance	January, 2000
Pat Brewer	Secretary	December, 1997
Pamela Schulz	Hospitality Assistant	June, 1994
Cyndy Garrett	Convention Services	February, 2005
Martha Little	Convention Sales	August, 1992
Greg Maxon	Group Travel	September, 1999
Karen Fraser	Convention Sales	April, 2002
Dulcie Couillard – PT	Grant Coordinator	April, 2005
Jan Chandler – PT	Volunteer Coordinator	July, 1990
Sharon Rahn – PT	Sales Coordinator	August, 2005
Leigh Ann Carnes – PT	Group Travel Coordinator	June, 2002

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The GSCCVB Interim Director reports to the City Administrator and to the Convention and Visitors Commission and the responsibilities include day-to-day operations of the GSCCVB. Reporting to the Interim Director is a staff of seven (7) full time employees and four (4) part-time employees. Four (4) new positions are budgeted in 2006 to boost direct sales now that the new convention center is open. In addition, a volunteer group will be providing support to all functions of the GSCCVB. The following flow chart illustrates the organizational structure of the GSCCVB.



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### **Office and Visitor Center Facilities**

The Greater Saint Charles Convention and Visitors Bureau is housed in a stand-alone building located at the corner of Main Street and Capitol Street. The GSCCVB owns the building, which is built in a colonial architectural style with two full floors and a hip roof with dormer windows. The brick structure provides 2200 square feet of office space, the lobby area provides 200 square feet and the audio visual (AV) room is another 200 square feet of visitor center space. The facility is not adequate in size to serve as both office space and a visitor's center and the crowded conditions were obvious to our team when we toured them in July. In August, all sales positions, with the exception of leisure and motor coach, were moved to the new Convention Center freeing up space in the main office. The ground level of the main office building is accessed from a Riverside Drive parking lot and the second floor is accessed at the Main Street level. Public rest rooms are provided on the lower level of the building and also in a historic structure just behind the building. A total of 9 on-site parking spaces are located directly behind the building for visitors as well as, 2 bus parking spaces and 2 handicapped spaces.

### **Current Market Positioning for the Greater Saint Charles Area CVB**

The GSCCVB is currently using the positioning and branding statements, "Come and Relive the Early American Spirit". The website is [www.historicstcharles.com](http://www.historicstcharles.com).

### **Previous promotional materials and public relations efforts**

In auditing the past efforts of the GSCCVB, RTM reviewed brochures, advertising, press releases, and media coverage. Our recommendations for improvements are a part of this report.

### **Lodging Inventory**

The City of Saint Charles currently has twenty-six (26) lodging properties collecting lodging and sales taxes. The twenty-six (26) properties have a total of 1,975 rooms with the vast majority of chain affiliated properties located in close proximity to Interstate 70 with the bed and breakfast inns located in close proximity to the historic district. Seventeen (17) of the lodging properties are franchised through national chains and represent 1,945 rooms which equates to 98% of the total room inventory. Nine (9) of the lodging properties are bed and breakfast inns or small motels totaling 30 rooms, which represents 2% of the total room inventory. There are three (3) lodging properties outside of the Saint Charles city limits which have volunteered to collect the lodging tax and contribute funds to the City of Saint Charles to increase the travel and tourism marketing efforts.

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Two (2) properties, the Embassy Suites and the Country Inn and Suites recently opened. New lodging properties typically attract significant attention and will likely take business from the existing properties as travelers seek out the newest rooms. This competition typically forces older properties to upgrade their amenities to enhance their properties or face possible business decline and perhaps down flagging to a lower rated brand. Overall, the lodging inventory in Saint Charles is fairly modern with 46% of the inventory having been built since 1996. 561 rooms (28%) were built prior to 1985. It should be noted the trend in lodging is to build upscale, interior corridor, limited service properties with approximately seventy rooms. Services such as high speed internet are expected by travelers today, in addition to amenities such as plush mattresses and upscale bath accessories. This trend is driven by traveler demand for more amenities in a small, secure, convenient facility. Saint Charles is similar to most communities as it must face challenges in driving occupancy to a percentage of older properties that may not meet the demands of many travelers today. Fortunately, there is typically a customer segment for every niche and it requires awareness of potential markets and strategies to succeed at filling all room types in a market.

### ***GSCCVB Funding***

The GSCCVB is funded through what the City of Saint Charles refers to as “tourism taxes” which is a combination of the meals and lodging taxes. These taxes are not specifically tracked annually. The meals tax is not tracked in terms of local and visitor spending. It is estimated by city officials that approximately 80% of the current funding to GSCCVB is derived from meals tax funds and 20% from lodging tax funds. It is clearly acknowledged that meals tax far exceeds lodging tax as funding sources for the GSCCVB. The meals tax is 8.45%. All local taxes are assigned to the general fund of the City of Saint Charles. The City of Saint Charles determines the funding levels for the GSCCVB.

A total of 14.406% lodging tax is collected on all overnight lodging in the City of Saint Charles with portions of the money going to state, county and city governments. The State of Missouri collects a tax of 7.45%, Saint Charles County collects a tax of 5% and the City of Saint Charles collects a tax of 1.956%. The GSCCVB receives no direct tax funding from the state or county lodging tax revenues.

The overall lodging tax rate of 14.406% is comparable to national averages and RTM’s experience in working with other destination marketing organizations. Experience has shown that visitors rarely complain about lodging taxes of 13% or less. Once lodging taxes exceed 13%, travelers start expressing frustration and lodging occupancy can be negatively affected. Saint Charles is at the upper end of the scale and should not consider any additional taxes to be levied upon lodging.

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RTM recommends meals, lodging, and sales taxes should be outlined more specifically and tracked on an annual basis. Furthermore, regarding the meals tax, specific tracking should allocate the percentage of meals tax paid by visitors and the percentage paid by local residents. For instance, it would be safe to claim that at least 30% of the meals tax is paid by visitors. Establishing these benchmarks and tracking procedures will enable the City of Saint Charles to more accurately determine the appropriate amount of funding for the GSCCVB. Thus, those taxes that can be traced to visitor spending should be reinvested in marketing of tourism.

The GSCCVB receives income from sources other than the tourism tax as is demonstrated in the chart below.

**GSCCVB Actual/Budgeted Income**

Income Category	2003 Actual	2004 Actual	2005 Budget
Tourism Tax	\$1,565,939	\$1,604,540	\$1,660,000
Penalties	\$12,505	\$11,176	\$11,500
Contribution (Voluntary Hotel Tax)	\$51,245	\$50,316	\$53,000
Tours	\$3,817	\$4,008	\$3,800
Membership	\$0	\$9,575	\$9,812
Grants-Destination Advertising	\$7,9281	\$135,000	\$135,000
Grants-Convention Marketing	\$60,000	\$60,000	\$60,000
<b>Total Income</b>	<b>\$1,772,787</b>	<b>\$1,874,615</b>	<b>\$1,933,112</b>

(Source: St Charles Convention and Visitors Bureau)

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**Comparable Tourism Marketing Funding**

A comparison of Missouri cities by number of lodging rooms and the size of the marketing budget for the community reveals Saint Charles ranks 5th among tourism marketing budgets statewide.

<b><u>CITY</u></b>	<b><u>Population</u></b>	<b><u>#of Hotel Rooms</u></b>	<b><u>Size of Staff</u></b>	<b><u>Budget</u></b>
Saint Louis	2.6 million	34,000	Marketing 63 Convention Center 87	\$13,000,000
Kansas City	1.8 million	24,000	43	\$8,100,000
Springfield-City	151,580	5,600	22	\$2,803,000
Branson-City	6,050	17,000	33 Welcome staff 5	\$2,500,000
<b>Saint Charles</b>	<b>68,000</b>	<b>1,900</b>	<b>12</b>	<b>\$2,179,950</b>
Columbia-City	87,000	3,126	7	\$1,600,000
St. Joseph	73,990	1,203	8	\$1,000,000
Joplin	44,300	2,000+	6	\$850,000
Jefferson City	40,000	1,300	5	\$650,000
Hannibal	17,757	860	6	\$330,000
Branson-County	33,271	22,000	~	~

(Data collected from other CVBs by Saint Charles CVB staff)

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**Revenues Compared to State and National Industry Growth**

It is important the GSCCVB look at five-year trends in tourism taxes, occupancy growth and lodging inventory to compare these to state, regional and national statistics. The average annual growth rate for total tourism revenues nationwide, between 1991 and 2001, is 4.32%. In addition, the Travel Industry Association of America (TIA) reports the total travel expenditures in the United States decreased 6.72% from 2000 to 2001, reflecting the first decrease in over a decade. That trend has now returned to typical growth levels of approximately 3% annually.

**Greater Saint Charles CVB Expenditure Analysis**

The following table shows the three major areas of the GSCCVB budget as a percentage of its total budget. The table also reflects the contributions made to local festivals.

**Percentage of Total CVB Budget/Actual**

<b>Budget Category</b>	<b>2005</b>	<b>%</b>	<b>2004</b>	<b>%</b>	<b>2003</b>	<b>%</b>
Salaries & Benefits	\$829,361	37.6%	\$695,755	36.5%	\$611,028	33.5%
Operating Expenses	\$263,215	11.9%	\$202,760	10.6%	\$237,728	13.0%
Marketing & Outreach	\$940,095	42.6%	\$898,506	47.2%	\$900,431	49.3%
Festival Contribution	\$172,000	7.8%	\$108,100	5.7%	\$75,400	4.1%
<b>TOTAL BUDGET</b>	<b>\$2,204,671</b>	<b>100%</b>	<b>\$1,905,121</b>	<b>100%</b>	<b>\$1,824,587</b>	<b>100%</b>

A review of the three basic budget categories for the GSCCVB (Salaries & Benefits, Office Expenses and Outreach) reveals the CVB is spending the money it receives appropriately as a percentage of the whole budget. These figures are within the standards set by the IACVB (International Association of Convention and Visitors Bureaus). According to IACVB, salaries and benefits should fall within a 25-40% range. Marketing and outreach should be approximately 40-50% and operating expenses should be in the 10% -15% range.

The IACVB makes no recommendations for funding to other entities such as festivals. RTM recommends all tourism marketing funds be allocated to the GSCCVB and the CVB make the decision for any funding to entities such as festivals and events in order to ensure all tourism marketing funds achieve their greatest potential return to the community.

**Executive Summary (Interim Report – November, 2005)**

**Inquiry Records and Statistics**

The primary purpose of a destination marketing organization (DMO) is to advertise the destination to generate inquiries that are “fulfilled” by mailing a package of visitor information. This effort is intended to generate increased visitation to the destination, which creates economic impact as a result. One method of measuring the impact of the DMO’s advertising efforts is to look at the number of inquiries generated each year. The true test of the success of the DMO’s marketing efforts comes from research that determines the number of inquiries “converted” to actual visits, thus, creating economic impact. In the following chart, an annual total number of inquiries and visits to the visitor center and CVB website are provided. The data reflects national trends where internet related travel planning activity is increasing and traditional phone inquiries are slowing.

**GSCCVB Inquiry Tracking**

	<b><u>2002</u></b>	<b><u>2003</u></b>	<b><u>2004</u></b>
<b>Visitor Counts thru CVB</b>	53,972	55,310	50,988
<b>Estimated Visitors to Area</b>	539,720	553,100	509,880
<b>Telephone Inquiries at CVB</b>	40,441	36,093	39,365
<b>Website Sessions</b>	<b>208,600</b>	<b>227,959</b>	<b>237,709</b>
<b>Website Hits</b>	<b>4,096,609</b>	<b>4,674,981</b>	<b>5,181,228</b>

The number of inquiries indicated above is good for a destination the size of Saint Charles. The statistics compare favorably with similar destinations. However, RTM does recommend inquiries be tracked more specifically and recommendations for tracking are stated in this report.

**Executive Summary (Interim Report – November, 2005)**

**Attendance at Saint Charles Area Attractions**

The following attractions reported their attendance statistics to the Greater Saint Charles CVB. It is interesting to note that attendance at the Saint Louis Gateway Arch is declining and the First State Capitol is relatively flat while the Lewis and Clark Boathouse (new facility) and Ameristar are increasing.

Attendance to attractions all across the U.S. is dropping significantly. The shift in visitation patterns by different generational groups has been identified as the cause for some of this change. Simply put, Baby Boomers and Gen X behave very differently from the Silent Generation and the War Generation.

National trends show Baby Boomers and GenX prefer unstructured leisure time, being entertained, shopping, dining and gaming. Thus the statistics for the decline in attendance to the Gateway Arch and flat attendance to the First State Capitol is easily understood as is the increase in gaming. The only anomaly is the Lewis and Clark Boathouse, where the new facility may account for the increase, as well as the significant focus on Lewis and Clark heritage in the past few years.

<b>Attraction</b>	<b>2000</b>	<b>2001</b>	<b>2002</b>	<b>2003</b>	<b>2004</b>
First State Capitol	44,711	52,569	56,849	52,127	51,092
Lewis and Clark Boathouse	24,327	24,433	24,839	32,484	61,739
Foundry Art Centre					30,205
Ameristar Casino	0	5,744,173	8,132,182	10,104,756	10,801,151
Gateway Arch	4,004,642	3,987,392	3,685,461	2,983,733	3,006,756
Harrah's Casino	4,682,534	6,019,813	5,363,022	4,546,618	4,853,166
Mt. Pleasant Winery	68,000	60,000	60,000	62,000	62,000
MO Wing Commemorative AF	1,000	1,000	1,000	1,000	1,000

## Executive Summary (Interim Report – November, 2005)

### **Summary of Missouri Tourism Economic Impact Developed by the University of Missouri for FY04**

- Σ **FY04 direct expenditures were up 12.3%:** Direct expenditures (on-site expenditures by domestic and international visitors plus airport-related expenditures) by travelers to Missouri were a record \$8.3 billion during FY04, up 12.3% from \$7.4 billion in FY03.
- Σ **FY04 visitation was up 10.7%:** During FY04 (July 2003 – June 2004), a record 20.6 million households visited Missouri, up from 18.6 million during FY03, a 10.7% increase.
- Σ **The primary trip purpose** for visitors to Missouri in FY04 were:
  - Visit Friends or Relatives (44%)
  - Entertainment/Sightseeing (17%)
- Σ **76.5% of Missouri's visitors arrive by automobile** as their primary mode of transportation. Only 11% identified airline use as their primary mode of transportation.
- Σ **Most popular activities:** Visitors who came to Missouri during FY04 participated in numerous activities, including:
  - Shopping (26%)
  - Attend social/family event (23%)
  - Outdoor (8%)
  - Historical places, sites, museums (6.7%)
  - Theme/amusement parks (6.3%)
- Σ **Approximately 65% of all travel parties traveling in Missouri are from out of state** and 35% from in-state.
- Σ **Most out-of-state visitors come from neighboring states:** Texas continues to send more visitors to Missouri than any other non-neighboring state (5.2% of all visitors to Missouri during FY04).
- Σ **Most visited destinations in Missouri:**
  - St. Louis (40%)
  - Kansas City (22%)
  - The Ozark Mountain vacation region (16%)

## **Executive Summary (Interim Report – November, 2005)**

### **Summary of TIA's TravelScope Research for Missouri July 2002 – June 2003**

- Σ **Point of origin (approximately the same rank order from FY95 to FY03):**
  - Missouri (54.1%)
  - Kansas (23.7%)
  - Arkansas (14.2%)
- (Variable rank order from FY95 to FY03):**
  - Iowa (12.8%)
  - Illinois (11.1%)
  - Nebraska (9.6%)
  
- Σ **Top reported activities (approximately the same rank order from FY95 to FY03):**
  - Shopping
  - Outdoor (hunt, fish, hike, bike, camp)
  - Theme/amusement park
  - Attend social/family event
  - Historical places, sites, museums
  - Cultural events/festivals
  - Attend sports event
  - Nightlife/dancing
  - National/state park
  - Gambling
  - City/urban sightseeing
  
- Σ **Percentage of visitors by season for FY03:**
  - Summer (34%)
  - Spring (24%)
  - Fall (23%)
  - Winter (19%)

## **Executive Summary (Interim Report – November, 2005)**

### **Greater Saint Charles Area Travel Related Economic Impact**

An analysis of the FY03 economic impact of travel and tourism in Saint Charles County shows the financial impact visitors leave in the community. The figures below show the amount of tax revenue generated by visitors to the area, thus relieving residents of some of the tax burden of maintaining the local infrastructure.

The 2003 economic impact of travel and tourism in Saint Charles County, Missouri is as follows: (the figures below are based on fiscal year 2003, the most recent figures available).

\$362,087,880	Tourism Related Taxable Sales Revenues (FY03) in Saint Charles County (Data Source: TIA, Travelscope)
\$26,504,832	State and Local Sales Taxes generated from the 7.32% sales tax collected on the above total tourism related sales (\$362,087,880) in Saint Charles County.
14,447	Total number of jobs attributed to travel in Saint Charles County (Data Source: TIA, Travelscope)
311,521	2003 Population of Saint Charles County. Estimate based on 2000 Census and 2004 Census estimate. (Source: US Census Bureau)
61,253	2003 Population of the City of Saint Charles. Census Bureau Estimate (Source: US Census Bureau)
101,663	Households in Greater Saint Charles Area (single & multi-family) (Source: US Census Bureau, 2000 Census)
\$260.71	Tax relief per Saint Charles County household from sales taxes paid by travelers to Saint Charles County

## **Executive Summary (Interim Report – November, 2005)**

### **Strategic Direction**

Saint Charles, Missouri was a tourism destination before Lewis and Clark purchased their last provisions here and started on their westward journey. Thus, the destination has a history of providing hospitality to travelers that precedes statehood and continues today.

The Greater Saint Charles area has a good geographic position for tourism development. Saint Charles is near the meeting point of the Missouri and Mississippi Rivers and is located on a major interstate across the Missouri River from the major urban market of St. Louis. This allows Saint Charles to take advantage of both pass-through and feeder tourism markets, both in the contiguous states as well as the larger region. Thus, we have a charming historic town, sitting along a beautiful river, on a major interstate and adjacent to a major urban area. Furthermore, Saint Charles has a good lodging inventory along with the shopping and dining amenities travelers seek. Plus, one finds a casino and wineries in the area in addition to the other amenities and attractions. Thus, Saint Charles has every reason to excel as a tourism destination. The interstate literally equates to a “river of tourism money” running through the destination. Simply put, as long as this volume of potential customers exists, the only reason for tourism failure is found in not providing the customer with products they desire...or not helping them find out products exist.

The current mission statement of the Greater Saint Charles Convention and Visitors Bureau is: “To develop and promote the hospitality industry in the Greater Saint Charles area, and to encourage economic growth by providing quality service to the visitor and convention delegate.”

The five years since the “high water mark” of tourism in 2000, have been challenging for all markets including the Greater Saint Charles area. Fortunately, during this time period, tourism has continued to grow for Greater Saint Charles. This underscores Saint Charles’s ability to succeed in tourism development.

It is now time to strategically look at how best to grow this industry for Greater Saint Charles. In RTM’s analysis, leaders and residents need to:

- 1) Understand the current “market mix” of segments being served in Saint Charles.
- 2) Insure existing customers find information that will lead them to local cash registers in order to generate greater economic impact immediately.
- 3) Establish a long-range vision for continued tourism development including products and amenities desired by targeted visitor segments.
- 4) Implement strategies to encourage growth of targeted customer segments.
- 5) Monitor and maintain visitor satisfaction.
- 6) Track and report results.

## **Executive Summary (Interim Report – November, 2005)**

The definition of tourism is “**putting visitors in front of cash registers**”. The Greater Saint Charles area has an excellent opportunity to increase the revenues generated by tourism, while not overburdening its infrastructure.

RTM recommends the following strategies to achieve this balanced growth:

### **Methodology and Summary of Findings**

Randall Travel Marketing (RTM) conducted in-depth interviews with twenty (20) convention and meeting planners that have brought conventions and meetings to Saint Charles or those who have considered the area and not brought a meeting to date. The purpose of these interviews was to ascertain perceptions of the marketing effectiveness of the Saint Charles Convention and Visitors Bureau (GSCCVB).

The specific interview questions and the aggregated responses follow. The average rating for each response is provided and any specific comments made are preceded by a bullet point. Every effort has been made to present the comments exactly as stated by the interviewee, while deleting any direct references that might identify the person who made the comment, thus ensuring anonymity.

Each question asked is stated in the document, followed by the responses provided by those interviewed.

**1. Please rate the overall appeal of Saint Charles as a destination for your meetings on a 1 – 5 scale (where 1=poor and 5=excellent)**

The meeting planners gave Saint Charles an overall average rating of 4.2.

**2. Have you held meetings in Saint Charles? \_\_\_\_\_ Yes  
\_\_\_\_\_ No (If NO, GO TO 2B-1)**

Sixty percent (60%) of those interviewed had held a meeting in Saint Charles, while slightly less, forty percent (40%) of those interviewed had not.

**2A. If you have held a meeting in Saint Charles, would you return?  
\_\_\_\_\_ Yes \_\_\_\_\_ No**

Four out of five respondents or eighty percent (80%) indicated they would return to Saint Charles or they would hold a meeting in Saint Charles in the future.

## **Executive Summary (Interim Report – November, 2005)**

### **2B. How many meetings have you held in Saint Charles?**

Responses to this question varied from one (1) to over ten (10).  
The average number of meetings held in Saint Charles was 1.5.

#### **1. What is the average number of delegates who attend?**

The average size of meeting groups ranged from 130 to 1,000.

#### **2. Approximate number of room nights utilized per meeting?**

The approximate number of room nights utilized ranged from 250 to 1,000.

### **3. What are the strengths of Saint Charles as a meeting destination?**

#### **VERBATIM RESPONSES:**

- Σ Central convenient location (13)
- Σ Main street area – historical district (7)
- Σ Shopping (5)
- Σ Close to airport (4)
- Σ Saint Charles CVB wonderful to work with, accommodating (4)
- Σ New Saint Charles Convention Center, Embassy Suites attached (4)
- Σ Nice place to visit; lovely, small quaint, big town amenities (4)
- Σ Great hotel selections (4)
- Σ Saint Louis access (3)
- Σ Size; easy to get around (3)
- Σ Variety of restaurants (3)
- Σ Attractions (3)
- Σ Population and income level

**Executive Summary (Interim Report – November, 2005)**

**4. What are the weaknesses of Saint Charles as a meeting destination?**

**VERBATIM RESPONSES:**

- Σ **Airport shuttle missing for Embassy Suites ( 2)**
- Σ Lack of medium size meeting facility that includes lodging
- Σ Parking fees in addition to facility cost
- Σ Public shows – not a big enough facility
- Σ “Nickel and Dime exhibitors” – unexpected cost
- Σ License and fees cumbersome for exhibitors
- Σ Signage for Convention Center on interstate not adequate
- Σ No upscale shopping and restaurants
- Σ Too long of a commute for attendees from south
- Σ Embassy Suites and Convention Center do not interact well, nor do they have a very good working relationship
- Σ Not centralized enough for statewide event
- Σ No name recognition

**5. Using the same 1-5 scale, how would you rate Saint Charles in its overall appeal on the following:**

<b><u>Saint Charles’s Overall Appeal</u></b>	<b><u>Avg.</u></b>
Meeting space quality in Saint Charles	<b>4.7</b>
Geographic location of Saint Charles for your meetings	<b>4.5</b>
Lodging quality in Saint Charles	<b>4.4</b>
Restaurants that appeal to meeting attendees	<b>4.2</b>
Meeting space quantity in Saint Charles	<b>4.1</b>
Affordable and accessible air transportation	<b>4.1</b>
Nighttime entertainment	<b>4.0</b>
Attractions that appeal to meeting attendees	<b>4.0</b>
Lodging Properties	<b>3.8</b>
Retail shopping for meeting attendees	<b>3.8</b>

**Executive Summary (Interim Report – November, 2005)**

**Respondents rated the various meeting facilities in Saint Charles and thusly:**

<u>Event Center Facilities</u>	<u>Avg.</u>
Saint Charles Convention Center	4.4
Heart of Saint Charles Conference Center	4.0
Columns Banquet and Conference Center	4.0
Family Arena	3.8
Wentzville Crossing Exposition & Convention Center	3.0
Stegton Regency Conference Center	N/A
Memorial Hall	N/A

**6. How aggressive is the sales team at the Saint Charles CVB compared to other CVBs that you have worked with?**

- 1. More aggressive = 35%**
- 2. Less aggressive = 0%**
- 3. About the same as others = 65%**

The respondents were split on this issue. Thirty-five percent (35%) answered “more aggressive” and sixty-five percent (65%) stated “about the same”. RTM interprets this data to indicate the CVB staff is appropriately aggressive in their sales efforts.

In addition, RTM further analyzed the responses to this question by tabulating only those respondents who had indicated they had not booked a convention or meeting in Saint Charles, representing the “lost bookings” segment of the market. Of this group, the data tabulated as follows:

- 1. More aggressive = 13%**
- 2. Less aggressive = 0%**
- 3. About the same as others = 87%**

Thirteen percent (13%) of respondents answered “more aggressive”, while eighty-seven percent (87%) responded, “about the same as others”. This data reconfirms for RTM, the Saint Charles CVB is appropriately aggressive in their marketing and recruitment efforts.

**Executive Summary (Interim Report – November, 2005)**

**7. Please rate the Saint Charles CVB on the following using the same 1 – 5 scale:**

**Saint Charles CVBs Marketing Efforts**

Attendance at trade shows	<b>4.3</b>
Recruitment effort in bringing meetings to Saint Charles	<b>4.2</b>
Direct sales efforts	<b>4.2</b>
Development - effective marketing materials & advertising from meetings	<b>4.0</b>
Wise use of CVB funds for meeting recruitment	<b>4.0</b>

**8. What is needed to increase the appeal of Saint Charles as a meeting destination?**

**VERBATIM RESPONSES:**

- Σ **Improve the Embassy Suites Hotel and Convention Center working relationship (4)**
- Σ Parking costs at Saint Charles Convention Center need to be eliminated
- Σ Improved signage for the new Saint Charles Convention Center
- Σ Incorporate a medium meeting facility with lodging and applicable pricing
- Σ Capitalize more on historical district
- Σ Implement a more consistent message
- Σ Nothing
- Σ Increase exhibitors space
- Σ Implement license and fees with facility rental cost
- Σ Increase number of site visits
- Σ More upscale restaurants and shopping
- Σ More marketing to associations

**Executive Summary (Interim Report – November, 2005)**

**9. What one thing could be done to attract more meetings to Saint Charles?**

**VERBATIM RESPONSES:**

- Σ **Improve the Embassy Suites and Convention Center working relationship (3)**
- Σ **Parking fees waived or included in rent of facility (2)**
- Σ **Higher end shopping and restaurants ( 2)**
- Σ More information on options
- Σ Play up the historical district
- Σ A facility that better accommodates medium size meetings which include lodging and applicable pricing
- Σ Provide a more consistent message
- Σ Continue to emphasize site visits
- Σ Encourage local businesses to work with meeting and event planners to promote each to the other
- Σ Provide a package offering group tours for “days off”

**10. Does it help you to receive sales information mailings direct from the lodging properties?**

Respondents were split on this issue with 13 respondents answering yes and 7 respondents answering no. Most asked they not be bombarded with information and information from lodging properties include pricing.

**11. What sales information do you want to receive? From whom should this be sent? What format of mailings works best for you (what to include in the mailings?)**

**VERBATIM RESPONSES:**

- Σ **All-Inclusive Package from the Saint Charles CVB via Mail (17)**
  - **Lodging, conference materials; space layout and capacity**
  - **Pamphlet; prices, menus at hotels**
  - **“New” information**
  - **Restaurant information; menus**
  - **Shopping information**
  - **Attraction information**
- Σ **Newsletter from Saint Charles CVB quarterly (17)**
- Σ **Nothing; do not mail anything; no need (3)**
- Σ What new things are available?
- Σ E-mail information

**12. How often should the CVB contact your organization?**

**Executive Summary (Interim Report – November, 2005)**

**VERBATIM RESPONSES:**

- Σ 1 time a year (3)
- Σ 2 times a year (8)
- Σ 3 times a year (6)
- Σ Don't need to (3)

- A. Acknowledge that the GSCCVB has established a strong foundation and accomplished good results.** RTM was impressed during this study to consistently find the GSCCVB has earned good results from their direct sales, marketing efforts and investment of resources. They have done a good job and should be acknowledged for their role in driving tourism economic impact. Additionally, RTM was impressed to see the level of support that community leaders have committed to the development of the local tourism industry. An accomplished tourism marketing agency and a willing community is a recipe for success. Having accomplished this foundation, it is now time to become more aggressive and drive this industry for greater results.
- B. Adopt a market segmentation approach for overall strategic tourism marketing growth.** Leaders of the Greater Saint Charles area must understand the current tourism environment and the value of each market segment currently visiting Greater Saint Charles.

2004	Category
<b>62.33%</b>	<b>TOTAL LODGING RESPONSE RATE</b>
22.23%	Leisure – tourists (visiting local attractions, historic sites, shopping, etc.)
19.64%	Individual corporate/business
13.69%	Transient – pass through on interstate
9.20%	Leisure – visiting friends and relatives
7.19%	Convention/meeting/group – corporate
5.59%	Wedding/reunions/family events
5.11%	Convention/meeting/group – SMERF
4.24%	Convention/meeting/group – sports
3.65%	Convention/meeting/group – government
2.73%	Gaming
2.45%	Other _____
2.21%	Group tour/motorcoach
1.11%	University-related
0.93%	Convention/meeting/group – association
0.03%	Golf package or golf group

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**C. Understand the true benefit of tourism to the Greater Saint Charles area is in the growth of per-visitor expenditures, as well as growing the volume of visitors.** Saint Charles leaders need to clearly understand that it is the *growth in per-visitor expenditures* that creates success.

<u>Category</u>	<u>Spending by Age Group</u>			
	<u>Overall Avg. Amount</u>	<u>39 under</u>	<u>40 – 59</u>	<u>60 above</u>
1. Lodging	\$109.25	\$187	\$174	\$158
2. Shopping	\$82.53	\$149	\$145	\$98
3. Attraction/amusement	\$62.01	\$89	\$110	\$79
4. Food / meals	\$60.16	\$99	\$97	\$91
5. Transportation	<u>\$39.58</u>	<u>\$51</u>	<u>\$61</u>	<u>\$68</u>
<b>Average Daily Expense</b>	<b>\$353.53</b>	<b>\$489</b>	<b>\$525</b>	<b>\$421</b>

**D. Increase per-visitor spending as the number one objective.**

The benefit of tourism to the residents of Greater Saint Charles can be found in generating higher per-visitor spending, economic impact, and tax relief. This should be the absolute priority for all tourism marketing and development efforts.

**E. Provide better visitor orientation and facilitation by installing compact, transportable visitor information kiosks in tourist areas.**

Existing and potential visitors to Saint Charles need to be provided with information that compels them to visit, leads them to area cash registers and encourages them to dine, shop, and extend their stay. Placing compact, transportable weather-proof kiosks at appropriate visitor points will result in getting information in the hands of more visitors twenty-four hours a day, seven days a week. RTM recommends placing these visitor information kiosks at the following locations:

- Σ Convention Center
- Σ Selected hotels
- Σ University
- Σ Hospital

**F. Move all CVB staff to the Convention Center. Adapt the current Main Street visitor center into a comprehensive sales and interpretive center for Saint Charles.** The CVB staff is undesirably packed into a space that is too small. Also, the Main Street visitor center does not provide the interpretive experience or the “showcase” needed to help visitors learn about all there is to see and do in the Greater Saint Charles area. Thus, RTM recommends the CVB staff be moved to the Convention Center and the entire facility on Main Street be converted into an interpretive center and selling showcase.

**F. (Continued)**

## **Executive Summary (Interim Report – November, 2005)**

The purpose of this center is to serve as a point of orientation, have an overview film, house exhibits of the history of Saint Charles, and a show room of “teasers” to make people want to stay, shop, and explore. This should be the one-stop “WOW” that makes people want to stay longer and return to Saint Charles.

- G. *Historic Saint Charles on The Missouri River: Create a “Tourism Strategic Vision” that incorporates land use, design, and development of retail, dining, entertainment, lodging, conventions, and transportation. The focus of this effort should be connecting the river to these amenities and creating an animated and lively historic town setting for long-term success.*** Clearly the number one asset of Saint Charles is its location and awesome history on the Missouri River. This heritage has not been capitalized upon as effectively as needed. RTM highly recommends that a task force be appointed to review this report and develop a “Tourism Strategic Vision” including land use, design, and development of Saint Charles into a lively and animated historic village setting that incorporates the river into the land use plan. Visitors to the historic district should be able to see the river and feel the ambiance as they shop, dine and spend. Leverage your history into a lively and animated destination that no tourist can resist. Also, this visioning process should evaluate the kind of retail, dining, lodging, etc. that will work best in generating economic impact for the community.
- H. *Create a highly memorable new gateway on Interstate 70.*** The residents of Saint Charles know the amazing history of the area. But, travelers do not. A compelling gateway sign is needed along Interstate 70. It should feature large bronze statues of Lewis and Clark and capture the spirit of the westward movement. It should feature the words, “Historic Saint Charles on the Missouri River”. This is the positioning that is the essence of Saint Charles. This gateway will create destination awareness and lure travelers to visit. An effective gateway includes:
- Σ Architectural style that matches the persona of the area
  - Σ Nighttime illumination
  - Σ Attractive landscaping
  - Σ The positioning statement on the sign under the “Welcome”
  - Σ Directions leading travelers to visitor information
- I. *Continue to develop signage and wayfinding to make it as easy as possible to find visitor information, attractions and amenities.*** Signage and wayfinding rated an average of 3.97 on a 1-5 scale where 1=low and 5=high. A rating under 4.00 is considered a failure. RTM strongly recommends a planned signage effort be implemented. Better signage and wayfinding are critical in getting customers to cash registers.
- J. *Hire a sports marketing consultant for sports tourism marketing.***

## **Executive Summary (Interim Report – November, 2005)**

RTM recommends hiring a sports marketing consultant to develop the potential for the sports tourism market in Greater Saint Charles. Again, the geographic location of Saint Charles makes this a market to grow. Sports-marketing offers strong potential, but it must be developed in such a way that the greatest return-on-investment is accomplished. Strategic selection of under-served market segments is required and the knowledge to grow those selected sport segments.

***K. Enhance existing products, attractions and activities to meet visitor expectations and develop new products that fit the enhanced positioning.***

The products and unmet needs that tested most significantly in this study included:

- ∑ Shops open in the evenings in historic district (50.00%)
- ∑ Guided river excursions (31.95%)
- ∑ More places to sit and rest in historic district (38.22%)
- ∑ A craft/artisan co-op featuring hand-made items in historic district (37.36%)

Clearly, the customer is saying that work needs to be done to fulfill the appeal of Saint Charles.

***L. Revamp marketing materials to improve conversion and visitor satisfaction.***

RTM has provided detailed recommendations for the improvement of the tourism marketing materials, advertising and public relations to drive increased visitation.

***M. Test market a variety of promotions and packages to determine potential successes.***

RTM encourages the GSCCVB to conduct a series of market tests to determine if a variety of promotions could offer success. This would include golf packages, retail promotions, KATY Trail excursions, wine country excursions, etc. Test the promotions for success before committing significant investment.

***N. Conduct on-going scientific research to determine efforts earning the best return-on-investment.***

- ∑ Monthly lodging market mix survey
- ∑ Visitor profile and conversion research every three years
- ∑ Annual evaluation of inquiry point-of-origin
- ∑ Website visitor interest and conversion analysis
- ∑ Inquiry database “data mining”

***O. Monitor visitor satisfaction with crucial components of visitor activity.***

**Executive Summary (Interim Report – November, 2005)**

Currently, amenities in the Greater Saint Charles area are rated thusly by visitors: (on a 1 – 5 scale where 1=low and 5=high)

<i><u>Amenity</u></i>	<i><u>Average Rating</u></i>	<i><u>Age Groups</u></i>	
		<i><u>49 under</u></i>	<i><u>50 over</u></i>
<i>Overall appeal of the attraction in the area</i>	4.33	4.35	4.38
<i>Variety of shopping &amp; merchandise in historic district</i>	4.16	4.03	4.24
<i>Range of choices for dining</i>	4.11	4.17	4.15
<i>Quality of the lodging rooms</i>	4.02	3.98	4.10
<i>Ease of finding visitor information</i>	3.99	3.98	4.10
<i>Signage and wayfinding</i>	3.97	4.03	4.02
<i>Lodging value you received for the price paid</i>	3.89	3.98	3.90
<i>Level of service / employee training</i>	3.89	3.86	3.98
<i>Prices of merchandise in the historic district</i>	3.60	3.68	3.62
<i>Convenience of shop operating hours in Historic District</i>	3.59	3.45	3.59

All ratings that fall below a 4.00 are not acceptable. Clearly, the convenience of shop hours, the prices, level of service, signage and wayfinding must be addressed and monitored for improvement.