

Intercept Interviews Findings and Responses

Methodology

Seasonal intercept interviews in Saint Charles were a part of this overall comprehensive research study. These intercept interviews were scheduled in three quarterly periods to allow for distinctions in behavior between the seasons. Each survey period is outlined below. The intercept interviews were conducted in-person and by survey distribution.

The intercept interview sites selected were chosen to provide a demographic and psychographic profile match for the overall lodging market mix as reported by the total lodging properties in the Greater Saint Charles area. The survey included an incentive of a drawing for a free weekend visit in Saint Charles to be selected from those that responded to the survey.

The survey instrument (questionnaire) contained twenty-two questions. Each question is stated in the following pages in numerical sequence and the findings and responses follow each question. Observations and conclusions based on the responses are stated after each response.

Summer 2005

Intercept interviews were conducted July 19-23, 2005 in Saint Charles, Missouri. One hundred and thirty three (133) surveys were completed through an intercept method. Thus, N=133 for the total intercept survey responses in the summer 2005 report.

It should be noted that Saint Charles was experiencing very hot weather during the July 19-23, 2005 period. Therefore, additional surveys were distributed to RV park guests and to trolley passengers from July 24 through September 14, 2005.

Autumn 2005

Intercept interviews were conducted October 20-23, 2005 in Saint Charles, Missouri. One hundred and seventy three (173) surveys were completed through an intercept method. Thus, N=173 for the total intercept survey responses in the Autumn report. The intercept interviews were conducted at a variety of lodging properties in Saint Charles. Additionally, surveys were distributed to RV park guests and to trolley passengers from October 20-23, 2005.

Spring 2006

Intercept interviews were conducted April 13-16, 2006 in Saint Charles, Missouri. One hundred and thirty nine (139) surveys were completed through an intercept method. Thus, N=139 for the total intercept survey responses in the Spring 2006 report. The intercept interviews were conducted at a variety of lodging properties in Saint Charles. Additionally, surveys were distributed to RV park guests and to trolley passengers from April 13-16, 2006.

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1. What is your home zip code?

Summer '05 Point of Origin

Missouri – 44	(34.37%)	Arkansas – 2	(1.56%)
Illinois – 18	(14.10%)	Georgia - 2	(1.56%)
Colorado – 6	(4.69%)	Kansas - 2	(1.56%)
Indiana – 6	(4.69%)	New York - 2	(1.56%)
California – 5	(3.91%)	Tennessee - 2	(1.56%)
Kentucky – 4	(3.12%)	Arizona - 2	(1.56%)
Michigan – 4	(3.12%)	Connecticut - 1	(.78%)
Ohio – 4	(3.12%)	Iowa - 1	(.78%)
Virginia – 4	(3.12%)	Maryland – 1	(.78%)
Florida - 3	(2.34%)	Oklahoma -1	(.78%)
Minnesota - 3	(2.34%)	Oregon - 1	(.78%)
North Carolina - 3	(2.34%)	Pennsylvania – 1	(.78%)
Wisconsin - 3	(2.34%)		
Texas - 3	(2.34%)		

Autumn '05 Point of Origin

Missouri – 37	(23.72%)	Florida – 2	(1.28%)
Illinois – 2	(14.74%)	Louisiana – 2	(1.28%)
Iowa – 15	(9.62%)	Minnesota – 2	(1.28%)
Indiana – 13	(8.33%)	Nebraska – 2	(1.28%)
Tennessee – 9	(5.77%)	Oklahoma – 2	(1.28%)
Kansas – 8	(5.13%)	Virginia – 2	(1.28%)
Texas – 6	(3.85%)	Georgia -1	(0.64%)
California – 6	(3.85%)	Kentucky – 1	(0.64%)
Ohio – 5	(3.21%)	New York – 1	(0.64%)
North Dakota – 4	(2.56%)	Pennsylvania – 1	(0.64%)
Michigan – 4	(2.56%)	South Dakota – 1	(0.64%)
Wisconsin – 3	(1.92%)	Washington – 1	(0.64%)
New Mexico – 3	(1.92%)		
Arkansas – 2	(1.28%)		

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1. (Continued)

Spring '06 Point of Origin

Illinois – 36	(29.03%)	Michigan – 2	(1.61%)
Missouri – 33	(26.61%)	Ohio – 2	(1.61%)
Kansas – 8	(6.45%)	Oklahoma – 2	(1.61%)
Indiana- 5	(4.03%)	Tennessee – 2	(1.61%)
Florida – 4	(3.23%)	Colorado - 1	(0.81%)
Texas – 4	(3.23%)	Massachusetts – 1	(0.81%)
Alabama – 3	(2.42%)	Maryland – 1	(0.81%)
Oklahoma – 3	(2.42%)	Minnesota – 1	(0.81%)
Wisconsin – 3	(2.42%)	Montana – 1	(0.81%)
Arkansas – 2	(1.61%)	North Carolina – 1	(0.81%)
California – 2	(1.61%)	Pennsylvania – 1	(0.81%)
Georgia – 2	(1.61%)	Virginia – 1	(0.81%)
Kentucky – 2	(1.61%)	Washington – 1	(0.81%)

For the three intercept periods we find that the majority of visitors are from within Missouri and Illinois. That matches the mail survey data. Following those two points of origin we typically find that the next most likely points of origin are the remaining contiguous states, or those along interstate corridors leading to and through Missouri.

It should be noted that this matches state tourism data as well.

2. Including yourself, how many people are in your travel party?

Number of Adults	Summer '05	Autumn '05	Spring '06
1	12.03%	14.53%	20.14%
2	63.15%	56.40%	51.08%
3	10.52%	10.47%	10.07%
4	6.01%	12.79%	11.51%
More than 4	8.28%	5.86%	7.19%
Average	2.76	2.49	2.52
No Response =	0	.099%	0%
Survey Sample (N) =	133	173	139
Question Sample (n) =	133	172	139

Summer Percentage of visitors traveling with adults only = 76.69%

Autumn Percentage of visitors traveling with adults only = 90.70%

Spring Percentage of visitors traveling with adults only = 71.94%

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2. (Continued)

Number of Children	Summer '05	Autumn '05	Spring '06
1	38.70%	43.75%	43.59%
2	48.39%	18.75%	30.77%
3	3.22%	18.75%	15.38%
More than 3	9.68%	18.75%	10.26%
Average =	1.90	1.76	1.98
No Response =	0	0	0
Survey Sample (N) =	133	173	139
Question Sample (n) =	59	16	42

Summer Percentage of visitors traveling with children = 23.31%
Autumn Percentage of visitors traveling with children = 9.30%
Spring Percentage of visitors traveling with children = 28.05%

An important part of a visitor profile is the size of the group visiting an attraction or a destination.

The typical response in this study was a travel party size of 2 adults. Overall, 76.69% of respondents in summer, 90.70% in autumn and 71.94% in spring reported travel parties comprised of only adults. Thus, SCCVB can conclude that the majority of typical travel parties visiting the destination are adults traveling without children.

Those families visiting Saint Charles that did have children typically had more than one child in their travel party. Note, this information is somewhat skewed as during the autumn intercept surveys as there were three parties with more than 16 children in the party. Thus, the most reliable number to use is the typical answer of 1-2 children per travel party of those who traveled with children. Almost one-fourth, or 23.31% of summer travel parties contained children. In autumn, only 9.30% of travel parties contained children. In spring, 28.05% of travel parties contained children. The spring increases were due to the time period of intercepts that included Easter weekend when an increase in family travel is likely.

Nationally, the Travel Industry Association of America (TIA) reports that one in five (22%) trips in the United States include children under the age of 18 so the Saint Charles statistics fairly closely match national travel trends.

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3. How many nights will you be away from home during this trip?

Length of trip varied by season, as is seen in the data below.

Number of nights	Summer '05	Autumn '05	Spring '06
0 Nights	5.88%	11.04%	21.48%
1 Night	2.52%	15.34%	22.22%
2 Nights	23.52%	31.29%	14.81%
3 Nights	20.16%	15.34%	15.56%
	10.08%	12.27%	11/85%
5 Nights or More	37.81%	14.72	14.07%
Average number of nights =	10.01* / 4.26	3.29	2.84
No Response =	11.76%	6.13%	1.02%
Survey Sample (N) =	133	173	139
Question Sample (n) =	119	163	135

**This summer average of nights was very high due to the number of surveys from the RV Park, where those visitors tend to stay on the road away from their home for months at a time. Once the RV respondents were segmented out, the average for typical travelers in the summer was 4.26 nights.*

The average length of time visitors stay in an area is a useful piece of information when planning marketing strategies. As one sees when evaluating this data, the seasonal patterns look typical, with summer trips lasting longer than autumn or spring. In analyzing this data, RTM determines that typical trips to Saint Charles are 2 to 3 nights in length, other than in the summer season, when trips generally are longer.

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4. Is this your first trip to Saint Charles?

	Summer '05	Autumn '05	Spring '06
Previously visited	55.42%	56.12%	81.75%
First Trip	44.58%	43.88%	18.25%

Summer Responses

Over half (55%) have previously visited Saint Charles with about 45% answering this was their first trip.

Autumn Responses

Over half (56%) have previously visited Saint Charles with approximately 44% answering this was their first trip.

Spring Responses

The majority of respondents (81%) answered they had previously visited Saint Charles with just 18% answering this was their first trip.

4-a. If so, how many times have you visited Saint Charles before this trip?

	Summer '05	Autumn '05	Spring '06
Once	33.55%	29.59%	7.37%
More than once	13.45%	13.27%	7.83%
Several times	35.83%	40.82%	25.81%
Other	17.17%	16.32%	58.99%*

** Other responses during the spring intercepts were in excess of several times a year with multiple visits within the same year reported.*

In these sets of questions we learn that Saint Charles enjoys substantial awareness as a year-round destination. The majority of visitors have visited previously, with a significant number having visited several times. RTM interprets this data to mean that summer and autumn visitors are likely to be repeat visitors, while those visiting in spring are highly likely to be repeat visitors. It would be wise for Saint Charles to actively recruit first-time visitors throughout the year, with an emphasis on spring visits.

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5. Are you overnighting in Saint Charles?

	Summer '05	Autumn '05	Spring '06
Yes	64.56%	73.96%	34.56%
No	35.43%	26.04%	65.44%

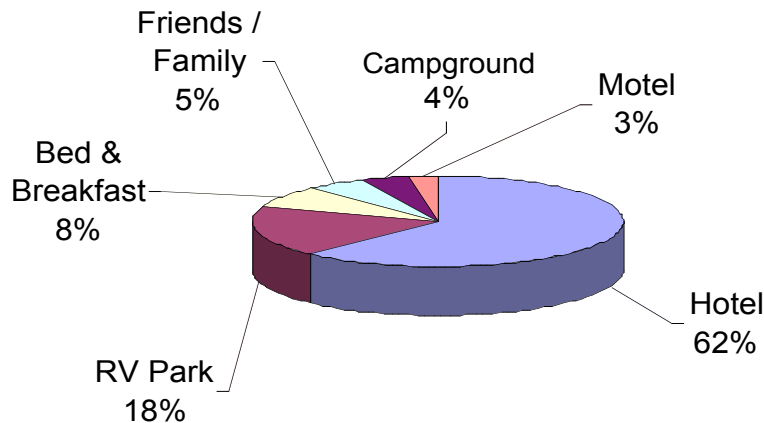
Saint Charles has a significant number of day-trippers to the region and their perceptions of Saint Charles as a destination were captured as part of this study.

The spring visitation was primarily day-trippers. This was a result of the Easter holiday weekend prompting visits with friends and family in the Saint Charles area.

RTM analyzes this data to mean that generally speaking, approximately one-quarter to one-third of the overall total of visitors to Saint Charles are daytrippers. This may change on holidays, when a larger percentage of visitors tend to be from the nearby drive markets.

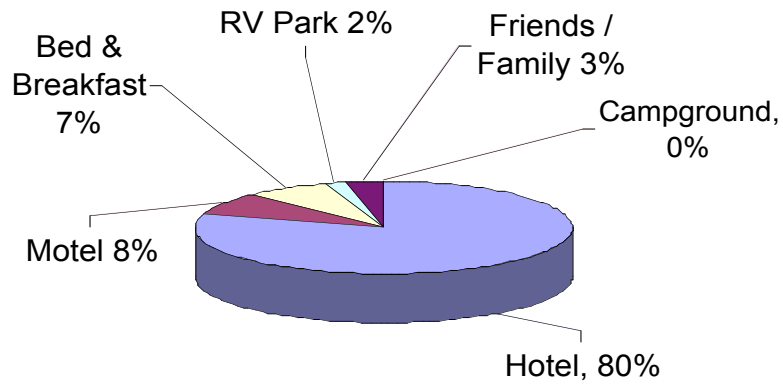
5.a. If so, what lodging property did you select? (specify)

Summer

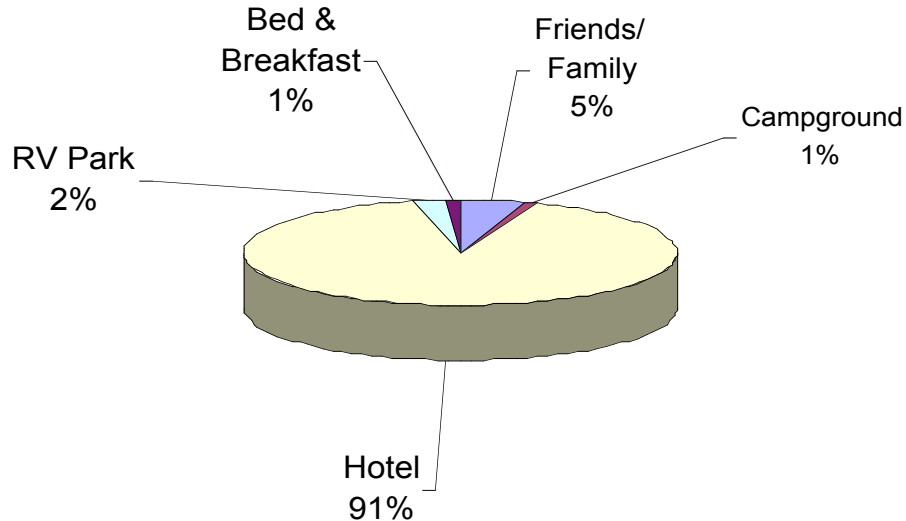


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Autumn



Spring



As is typical of most markets, more than two-thirds of overnight visitors to Saint Charles choose hotels and motels. The remaining portion is filled with those choosing bed and breakfast inns, campgrounds, RV parks, and homes of friends and family. However, there is also a bias in this data as most of the intercept interviews were conducted by RTM interviewers at hotels and motels.

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6. What was the major purpose of this trip to Saint Charles?

The TOP responses are in bold

	Summer '05	Autumn '05	Spring '06
Visit historic shopping district	16.76%	18.46%	10.45%
Vacation/getaway	13.06%	11.54%	8.21%
Business	11.56%	9.23%	18.66%
Visit friends/relatives	10.40%	13.08%	29.85%
Other	6.36%	0.00%	0.75%
Overnight/part of a longer trip	6.35%	4.62%	0.75%
Sporting event	5.78%	0.77%	2.99%
Meeting/convention	5.20%	28.46%	1.49%
Day trip	4.62%	3.08%	14.18%
Antique shopping	4.62%	0.00%	0.00%
Museum	3.46%	0.00%	0.00%

Summer listed as “Sports event - specify”:

- Σ Martial arts tournament
- Σ World Series (Under 9 boys baseball)
- Σ Cardinals game

Summer listed as “Other - specify”:

- Σ Anniversary
- Σ Wedding
- Σ Visiting river towns
- Σ Elderhostel
- Σ Music competition in St. Louis

Autumn listed as “Other - specify”:

- Σ Wedding
- Σ Shopping - Christmas and with friends/family
- Σ Day trip
- Σ Anniversary
- Σ Bike KATY Trail (vacation/getaway)
- Σ Visited friends and relatives
- Σ Casino gambling
- Σ After wedding stay
- Σ Bicycle
- Σ Business
- Σ Caramel apple
- Σ Class reunion
- Σ Family get together
- Σ Fundraising party for UMR@ Saint Albous
- Σ Funeral

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- Σ Have fun, shopping, lunch
- Σ Keep wife happy
- Σ Lewis and Clark Boathouse
- Σ Lunch
- Σ One day getaway
- Σ Passing through Kansas City
- Σ Reunion
- Σ Riding trail, left car at Lewis and Clark
- Σ Sightseeing
- Σ Traveling through and saw casino
- Σ Visit family in Denver
- Σ Visit historic shopping district

Spring listed as “Other - specify”:

- Σ Anniversary
- Σ Baseball game in St. Louis
- Σ Riding bikes on Katy Trail
- Σ Wrestling competition

Here one must remember the selection bias created by the RTM professionals in targeting leisure travelers.

7. *What type of lodging did you use during your visit to Saint Charles?*

Summer

The top answer from respondents indicated they stayed in either a hotel or motel (65%) during this visit. The majority of these interviews were conducted at hotels and motels.

Autumn

The top answer from respondents indicated they stayed in either a hotel or motel (88%) during this visit. The majority of these interviews were conducted at hotels and motels.

Spring

The top answer from respondents indicated they stayed in a hotel (91%) during their visit. The majority of these interviews were conducted at hotels.

As we learned in question 5, the majority of visitors to Saint Charles choose to stay in hotels and motels.

8. *What attractions or activities in the area did you visit while in the Saint Charles region? (list)*

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When respondents were given an open-ended question in which to answer what activities/attractions they visited while in Saint Charles, the following were the most popular activities:

The TOP THREE activities are in bold

	Summer '05	Autumn '05	Spring '06
Visiting historic district / Main Street	35.16%	9.58%	17.59%
Shopping	16.48%	18.09%	22.61%
Lewis and Clark Boathouse / Museum	13.18%		3.02%
Casino	12.08%	13.80%	16.58%
Trolley	5.49%	-----*	1.01%
Dining	-----*	9.52%	27.64%
Other	4.22%	_-----*	11.56%

* Numbers are not significant enough for percentages

Interestingly, a significant number of respondents for each intercept period reported they enjoyed activities that were located in St. Louis, in addition to those they visited in Saint Charles. This matches the mail survey data in which 62.16% of visitors reported that they visited St. Louis during their last trip to Saint Charles.

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9. What information and trip planning source did you use to plan this trip?

The TOP Sources are in bold

	Summer '05	Autumn '05	Spring '06
Internet	34.35%	31.58%	23.08%
Other	29.44%	36.80%	30.07%
Friend/Family	15.33%	23.39%	16.08%
Brochure	8.58%	4.09%	4.20%
State travel guide	7.97%	2.34%	3.50%

Listed as “Other - specify”:

Summer Responses

- ∑ Previously visited
- ∑ AAA
- ∑ Meeting and convention planning services
- ∑ Various books, travel planners, maps

Autumn Responses

- ∑ Previously visited
- ∑ Convention/meeting planner
- ∑ AAA

Spring Responses

- ∑ Previously visited
- ∑ Business and travel agencies booked trip
- ∑ Casino website

This data provides excellent clues as to the behavior distinctions between those who utilize the internet and other sources for trip planning information and those who are already aware of the area by conferring with family and friends. Also, we see that “previously visited” ranked highly as a response.

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10. *The following is a list of activities that people may do while visiting Saint Charles. Please circle all activities that at least one member of your travel party did while visiting.*

The TOP activities are in bold

	Summer '05	Autumn '05	Spring '06
Walking downtown	13.67%	33.33%	20.26%
Shopping in historic district	12.94%*	44.67%	20.00%
Shopping	11.51%	34.67%	13.68%
Driving/sightseeing	9.83%	20.00%	6.32%
Visit a museum	7.43%	6.00%	2.89%
Visit a historic site	7.43%	14.00%	4.47%
Antique shopping	7.19%	8.67%	2.37%
Business	5.27%	25.33%	5.53%
Visit a state park	4.55%	2.67%	1.84%
Visit an art gallery	4.07%	4.67%	2.11%
Camping	3.35%	0.00%	0.53%
Visit Daniel Boone's house in the county	2.15%	1.33%	0.53%
Other – Casino*	1.91%	14.67%*	7.11%*
Attend a sports event	1.91%	2.00%	3.16%
Visit a winery in the county	1.67%		2.63%
Attend a festival	1.67%		0.53%
Golf	.96%		0.79%
Hiking	.96%		1.58%
Attend a concert	.71%		0.79%
Meeting/seminar	.47%		1.58%
Boating/fishing	.23%		0.26%

**Casino was a write-in answer for autumn 2005. There were significantly more casino visitors in autumn than summer. The casino visitors interviewed were intercepted in the hotels/motels. Interestingly, they typically did not know about the attractions in Saint Charles as there was an absence of brochure racks, etc. at the hotels. Also, the spring visitors reported a significant number of rooms comped by the casino.*

In assessing the overall perceptions of product value, it is important to note the activities in which visitors participate. This also provides clues as to which marketing messages might be most successful. In other research studies conducted by RTM around the country, we find similar responses to the data presented here. Frequently mentioned activities in other similar studies include shopping, strolling downtown areas and sightseeing.

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11. Overall, on a 5 point scale (where 5 is Excellent, 3 is Average and 1 is Poor), how would you rate your visit to Saint Charles?

	Summer '05	Autumn '05	Spring '06
5 (Excellent)	55.81%	54.32%	62.28%
4	35.65%	38.55%	29.82%
3 (Average)	8.52%	6.63%	7.89%
2	0.00%	0.00%	0.00%
1 (Poor)	0.00%	0.00%	0.00%
No Response	3.10%	4.10%	.007%
Average Rating	4.47	4.48	4.58

A cross tabulation of the data produced the following table that shows the visitor rating for the total visit experience to Saint Charles by the type of trip taken, the gender of the respondent and by the major purpose for the visit to the area.

	Summer '05	Autumn '05	Spring '06
<u>Gender</u>			
Women	4.60	4.51	4.63
Men	4.28	4.41	4.50
<u>Major Purpose for Visit</u>			
Vacation Getaway	4.52	4.36	4.70
Visit friends/relatives	4.52	4.56	4.68
Business	4.22	4.27	4.36
Visit historic shopping district	4.62	4.54	4.43
Meeting/Convention	4.56	4.49	5.0

Even though this is a 5 point scale, in RTM's experience, people tend to rate their leisure experiences highly. Thus, in RTM's analysis a 4.00 is considered the minimum acceptable mark of satisfaction. Ratings over a 4.00 tend to reflect adequate satisfaction levels. The most typical ratings RTM encounters are in the 4.20 – 4.40 range. Ratings over a 4.50 are considered excellent.

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12. What did you like or dislike the most about your visit to Saint Charles?

Summer

Top Reported Likes

- Σ Friendly people/helpful (19)
- Σ Museums/attractions/historic downtown (18)
- Σ Beautiful/clean/charming/historic/quaint area (14)
- Σ Historic (14)
- Σ Trolley and driver (14)
- Σ Stores (12)
- Σ Hotel (11)
- Σ Food/dining/restaurants(4)

Top Reported Dislikes

- Σ Weather/heat (23)
- Σ Traffic (21)

Autumn

Top Reported Likes

- Σ Beautiful/clean/charming/historic/quaint area (26)
- Σ Accommodations/hotel (16)
- Σ Friendly people/helpful (15)
- Σ Hotel (12)
- Σ Convenient location (10)
- Σ Stores (8)
- Σ Saint Charles Convention Center (4)
- Σ Architecture (3)

Top Reported Dislikes

- Σ Not enough parking (8)
- Σ Traffic (8)
- Σ Maps and signage (4)
- Σ More bathrooms (3)

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Spring

Top Reported Likes

Σ Shops (21)	Σ Atmosphere (3)
Σ Historic District (16)	Σ Brick Streets in downtown (3)
Σ Friendly people (13)	Σ Downtown (3)
Σ Embassy Suites (12)	Σ Quiet and peaceful (3)
Σ Cleanliness (9)	Σ Antiques (2)
Σ Convenience to various activities (7)	Σ Area festivals (2)
Σ Quaint (7)	Σ Attractions (2)
Σ Casino (6)	Σ Landscaping (2)
Σ Architecture (5)	Σ Baskets and quilts stores (1)
Σ Scenic (5)	Σ Being with family (1)
Σ Beautiful area (4)	Σ Browsing (1)
Σ Ice Cream (4)	Σ Close to home (1)
Σ Various Restaurants (4)	Σ Not too overdeveloped (1)
Σ Ambiance (3)	Σ Safe to walk around (1)

Top Reported Dislikes

Σ Traffic (15)	Σ No hot water in hotel room (1)
Σ Cobblestones uneven (5)	Σ No nightlife - dancing for younger adults (under 21) (1)
Σ Power Outage (4)	Σ No pets in hotel (1)
Σ Crowd (3)	Σ No water fountains downtown (1)
Σ Parking is difficult and not enough (3)	Σ No wireless internet at hotel (1)
Σ Bad Service at restaurant (2)	Σ Not an historic area (1)
Σ Lack of brochure racks at hotel with area brochures (2)	Σ Not enough classic car events (1)
Σ Uneven sidewalks (2)	Σ Not enough dining options for kids (1)
Σ Weather – hot (2)	Σ Not enough restaurants (1)
Σ Wine store closed beside restaurant (2)	Σ Not enough water scenery (1)
Σ Casinos (1)	Σ Not enough western style stores - clothing, art, etc. (1)
Σ Didn't have rental car to go see area (1)	Σ Parking attendant at Embassy Suites during convention center events is a hassle for hotel guests not attending event (1)
Σ Far from my house (1)	Σ Road connections are weird (1)
Σ Fur Store (1)	Σ Shops have all the same thing and pricey (1)
Σ Historic District too touristy (1)	Σ Stores not wheelchair accessible(1)
Σ Hotel needs heavier curtains to block outside light (1)	Σ Unclear public downtown restrooms(1)
Σ Lost at casino (1)	Σ Wouldn't sell firearm to out of state resident (1)
Σ Need a better map of Saint Charles area (1)	
Σ No concierge services to recommend dining options with menus and pricing for area restaurants (1)	

Knowledge of the characteristics or attributes which visitors liked and disliked about their visit is useful information in assessing product quality. This information

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is provided to local tourism entities to help take corrective measures and for developing new promotional messages.

Clearly the historic nature of the destination, friendly people, cleanliness, and beautiful area appeal to visitors. The major dislikes include parking, weather, and construction that impacts traffic on Interstate 70. These likes and dislikes are very similar to those found in the mail survey portion of this study which identified the historic charm of the destination, the restaurants and shops and other amenities as offering the top appeal. The mail survey also matches the dislikes identified here including parking, traffic and hours of shops not being convenient. Thus, Saint Charles can have confidence in the validity of these findings.

13. How far in advance did you plan this trip to Saint Charles?

The TOP THREE answers are in BOLD

	Summer '05	Autumn '05	Spring '06
1 week before	32.53%	24.52%	48.70%
2 weeks before	17.46%	6.45%	19.13%
1 month before	13.49%	23.87%*	18.26%
2 months before	9.52%	20.00%*	6.09%
3 months before	6.34%	8.39%	4.35%
4 months before	7.14%	5.16%	0.00%
5 months before	0.00%	5.16%	1.74%
6 months before	13.49%	6.45%	1.74%

**The autumn intercepts included a good number of meeting/convention delegates. The convention/meeting delegates consistently reported a longer trip planning time than leisure respondents.*

This data matches what we learned in the mail survey portion of this study where respondents typically reported their trip planning time was consistently one month or less from time of departure. The only anomaly we found were the convention/meeting delegates, who typically have a longer trip planning cycle.

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14. Approximately how much did / will you spend during your trip to Saint Charles?

Summer Daily Trip Totals

<u>Spending Category</u>	<u>Highest Amount</u>	<u>Lowest Amount</u>	<u>Average Daily Amount</u>
Lodging	\$600.00	\$45.00	\$113.81
Food/meals	\$475.00	\$5.00	\$69.71
Attractions/amusements	\$350.00	\$4.00	\$18.40
Shopping	\$680.00	\$15.00	\$41.65
Transportation, fuel, airfare, etc.	<u>\$700.00</u>	<u>\$5.00</u>	<u>\$21.40</u>
TOTAL	\$2,805.00	\$74.00	\$264.97

Autumn Daily Trip Totals

<u>Spending Category</u>	<u>Highest Amount</u>	<u>Lowest Amount</u>	<u>Average Daily Amount</u>
Lodging	\$830.00	\$30.00	\$124.82
Food/meals	\$500.00	\$2.00	\$78.68
Attractions/amusements	\$500.00	\$2.00	\$116.55*
Shopping	\$500.00	\$10.00	\$150.52
Transportation, fuel, airfare, etc.	<u>\$700.00</u>	<u>\$15.00</u>	<u>\$87.51</u>
TOTAL	\$3,030.00	\$59.00	\$558.08

Spring Daily Trip Totals

<u>Spending Category</u>	<u>Highest Amount</u>	<u>Lowest Amount</u>	<u>Average Daily Amount</u>
Lodging	\$800.00	\$12.00	\$157.15
Food/meals	\$400.00	\$2.25	\$90.37
Attractions/amusements	\$600.00	\$2.00	\$149.05*
Shopping	\$1000.00	\$5.00	\$113.83
Transportation, fuel, airfare, etc.	<u>\$600.00</u>	<u>\$20.00</u>	<u>\$88.33</u>
TOTAL	\$3400.00	\$41.25	\$510.40

*Casino goers spent a great deal more on amusements/attractions, listing the amounts of monies they wagered ranging from several hundreds to thousands of dollars.

Intercept Interviews Findings and Responses

Knowledge of the spending habits of those who travel to Saint Charles will benefit the Saint Charles CVB in projecting realistic revenue growth in the future. The figures on the previous page, when combined with the average length of stay information (Question 3) and repeat visitation (Question 4), provide insight into the economic impact that each travel party generates in a community.

As found in Question 3, the average length of stay during summer in Saint Charles is 4.26 nights, after excluding the RV traveler. Therefore, dividing the average amount spent while in the area by the average number of nights determines the average daily expenses in each category. Using this formula, the typical travel party spent the following amounts each day:

Daily Trip Expenditure Totals

<u>Category</u>	Summer '05 <u>Amount</u>	Autumn '05 <u>Amount</u>	Spring '06 <u>Amount</u>
1. Lodging	\$113.81	\$124.82	\$157.15
2. Food/meals	\$69.71	\$78.68	\$90.37
3. Attractions/amusements	\$18.40	\$116.55	\$149.05
4. Shopping	\$41.65	\$150.52	\$113.83
5. Transportation	<u>\$21.40</u>	<u>\$87.51</u>	<u>88.33</u>
6. Average number of nights stayed	4.26	3.29	2.84
Average Daily Expense	\$264.97	\$558.08	\$510.40

NOTE: Remember that few casino goers were interviewed in summer of 2005. Apparently casino goers spend more on lodging, food, shopping and transportation than do non-casino goers. This was found throughout the different intercept periods.

The largest daily expense for travelers to Saint Charles typically is lodging. Food/meals are the second largest expense in summer and the fourth largest in autumn, when shopping and gaming are higher. Clearly, seasonal expenditures vary. This will be helpful in planning future marketing programs.

Intercept Interviews Findings and Responses

15. Following is a list of amenities offered in Saint Charles. Considering your last visit, please rate each amenity:

(5 = Excellent, 3 is Average and 1 is Poor) (Circle one for each)

<u>Amenity</u>	Summer '05 <u>Avg.</u>	Autumn '05 <u>Avg.</u>	Spring '06 <u>Avg.</u>
The quality of lodging rooms	4.26	4.52	4.60
The selection of shopping	4.21	4.36	4.21
The overall appeal of the attractions in the area	4.20	3.99*	4.44
The range of choices for dining	4.08	3.95	4.32
The lodging value you received for the price paid	4.06	4.19	4.47

**Visitors found at hotels had little knowledge of the downtown area attractions.*

The rating by visitors of an area's amenities is useful in understanding if visitor expectations are being met by actual experiences. When we find ratings below the

"A" or 4.29 mark we see an indication that the value of the destination/attraction needs to be examined. Ratings that fall below a 4.00 are considered a failing grade.

Intercept Interviews Findings and Responses

16. Did you visit the historic district shopping area? Yes/No

	Summer '05	Autumn '05	Spring '06
Yes	59.69%	67.31%	68.70%
No	40.31%	32.69%	31.30%

16.a. Did you make a purchase?

	Summer '05	Autumn '05	Spring '06
Yes	50.39%	49.61%	67.27%
No	59.44%	40.56%	32.73%

16.b. If you did visit, please rate the following:

	Summer '05 Avg.	Autumn '05 Avg.	Spring '06 Avg.
<u>Amenity</u>			
Overall appeal of shopping area	4.42	4.47	4.57
Variety of shopping	4.21	4.22	4.37
Choices for dining	4.09	4.14	4.33
Service level in historic district	4.42	*4.24	4.66

*Autumn visitors to the historic shopping district sometimes found stores crowded and experienced longer lunches than they would have liked, especially during the weekends when the numbers of visitors to the district were significantly higher than the weekdays.

Interestingly, respondents who made a purchase more favorably rated the overall appeal, variety of shopping and dining and the service level within the historic district. This matches national data that documents the more a person spends shopping in a destination, the higher they rate their satisfaction level.

Intercept Interviews Findings and Responses

17. What would you recommend be added to the shopping district?

Summer Responses:

- Σ **Other shops, boutiques, unique merchandise (8)**
- Σ **More restaurants (4)**
- Σ **More historic information on exterior of buildings (3)**
- Σ **Another trolley (2)**
- Σ **Restrooms (2)**
- Σ **Parking (2)**
- Σ Outdoor air-conditioning
- Σ Canopy over sidewalks
- Σ Outdoor seating areas
- Σ Free ice water outside

Autumn Responses:

- Σ **Map - you are here with restroom signage (3)**
- Σ **Benches (3)**
- Σ **Parking (3)**
- Σ **Restaurants (2)**
- Σ **More “Christmassy” at this time of year (2)**
- Σ **Shopping carts (2)**
- Σ Book store
- Σ Free shuttles
- Σ Frozen custard
- Σ Dancing
- Σ Lewis and Clark secured parking
- Σ Men’s shops
- Σ More antique stores
- Σ More outside dining
- Σ More clothing stores
- Σ More dining variety
- Σ More ice cream
- Σ More readily accessible history information on buildings
- Σ More seating around river on grass
- Σ More variety of merchants
- Σ More victorian shops
- Σ Museum of history of area
- Σ Pottery store
- Σ Quality of stores – eliminate repetition in stores
- Σ Restaurants on river
- Σ Riverboat cruises
- Σ Service stations
- Σ Sports bar restaurants
- Σ Take parking off street
- Σ Water fountain

Intercept Interviews Findings and Responses

Spring Responses:

- Σ **More bathrooms and clean bathrooms in Historic District (4)**
- Σ **Different types of stores - not crafty (2)**
- Σ **More parking downtown (2)**
- Σ **More seating in downtown area (2)**
- Σ Better hotels
- Σ Better maps of downtown stores
- Σ Child-friendly shaded area with playground
- Σ Clothing store for men and women
- Σ Culturally specific shops
- Σ More casual dining
- Σ More classic car events
- Σ More dining
- Σ More hotels downtown and more info on them
- Σ More Indian type stores, more guy things
- Σ More lingerie stores
- Σ More outside dining areas
- Σ Nature preserve
- Σ Need a dinner cruise
- Σ Nice river development with docks, boardwalk
- Σ Open up the vacant storefronts
- Σ Paddleboats on river
- Σ Plus size clothing store
- Σ Shady benches by river
- Σ Shop that has wine from all the wineries
- Σ Signs identifying trees downtown
- Σ Some home accent stores
- Σ State Park
- Σ Trendier, artsy, not so country with stores and restaurants
- Σ Trolley
- Σ Vintage clothing store
- Σ Water fountains on Katy Trail
- Σ Western style store

In analyzing this data, we find that what is most desired in terms of new products is a wider range of retail merchandise as well as more upscale merchandise. Additional needs are for amenities in the historic district include more restrooms, more benches, and more places to rest and retreat from bad weather.

- 18. What type of attractions or activities, would you participate in if offered in Saint Charles? (circle the number of ALL that interest you)**

Intercept Interviews Findings and Responses

The TOP responses are in bold

	Summer '05	Autumn '05	Spring '06
Guided river excursions	57.14%	35.84%	13.76%
Downtown trolleys	50.37%	34.10%*	11.74%
Live music in historic district while you are shopping	43.60%	-----**	17.43%
Dinner theatre	-----**	24.86%	11.93%
Water taxi connecting sites on the river	35.33%	29.48%	12.48%
Upscale historic district lodging	25.56%	16.76%	6.79%
More fine dining	24.81%	28.90%	10.83%
Wine festival featuring local wines	-----**	-----**	15.05%

*Hotel visitors in the autumn study were unaware of downtown attractions. Therefore their interest in a trolley to the downtown is suspect.

**Question not asked on survey.

Knowing the unmet needs or types of attractions, events, and activities that will draw visitors to an area is powerful information for Saint Charles to use in economic development and tourism product enhancement efforts. The top attractions and activities that tourists would like to see added in Saint Charles are identified above.

Evaluating these findings, RTM notes how well they match the responses in the mail survey portion of this overall comprehensive study. Thus, Saint Charles can have a high level of confidence in this data and strategic development of these activities in Saint Charles will most likely result in increased visitor appeal.

Demographics

Intercept Interviews Findings and Responses

Demographics are the descriptive statistics dealing with a specific population of people. The demographics of visitors are excellent descriptions of the target markets that are visiting an attraction or destination. The demographics of the sample of respondents who requested information about Saint Charles are described in the following information.

19. Education?

	Summer	Autumn	Spring
Grade school	.76%	1.24%	0.00%
Some high school	.76%	0.00%	5.76%
Other	2.28%	0.00%	0.00%
Technical school	1.52%	1.86%	1.44%
High school graduate	17.55%	16.77%	24.46%
Some college	23.56%	20.50%	17.27%
College degree	31.16%	40.37%	32.37%
Graduate school	22.13%	19.25%	18.71%

The largest percentage of respondents for each survey period reported having a college degree followed by those having completed some college or by those who had completed graduate school. In general, the respondents were well educated and better educated than the general United States population, which is typical of the traveling public.

20. What is your age?

Summer ages ranged from 13 to 88. Average = 49
 Autumn ages ranged from 20 to 85. Average = 48
 Spring ages ranged from 14 to 93. Average = 48

This also matches data for other similar areas. Tabulating the survey response data by generational group produces the following table:

		Summer	Autumn	Spring
		'05	'05	'06
		49	48	48
Average Age		%	%	%
Generational Group	Age Range	%	%	%
Generation Y	4-22	3.2%	2.5%	4.55%
Generation X	23-43	30.4%	34.6%	31.82%
Baby Boomer	44-61	42.4%	47.8%	52.27%
Silent Generation	62-79	22.4%	12.6%	9.09%
War Generation	80+	1.6%	2.5%	2.27%

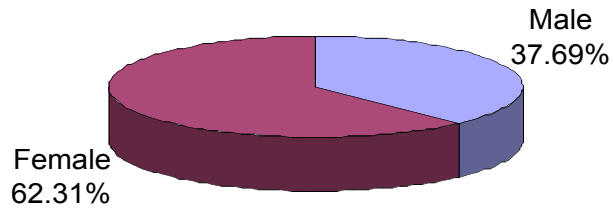
21. Gender?

Intercept Interviews Findings and Responses

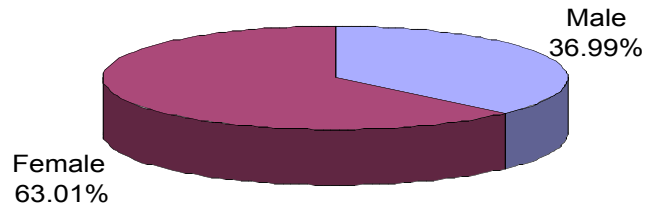
Almost two-thirds (62.31%) of respondents were female while slightly more than one-third (37.69%) were male.

	Summer '05	Autumn '05	Spring '06
Female	62.31%	63.01%	58.52%
Male	37.69%	36.99%	41.48%
No Response =	3.0%	16.0%	2.87%
Survey Sample (N) =	133	173	139
Question Sample (n) =	129	146	135

Summer

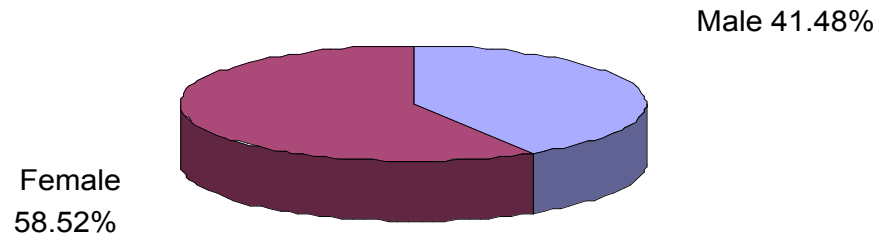


Autumn



Spring

Intercept Interviews Findings and Responses



Intercept Interviews Findings and Responses

22. *What is your occupation? (Specify)*

Summer Responses

Retired	(37)	Electrician	(2)
Educator	(13)	Travel Agent	(2)
Sales	(10)	Military	(2)
Management	(10)	Business Owner	(2)
Medical	(8)	Attorney	(1)
Other	(8)	Manufacturing	(1)
Housewife	(7)	Engineer	(1)
Financial	(5)	Factory Worker	(1)
Student	(4)	Farmer	(1)
Government	(4)	Flight Attendant	(1)
Clerical	(3)	Realtor	(1)
IT	(3)		

Autumn Responses

Retired	(25)	Clerical	(4)
Business Management/Owner	(16)	Student	(4)
Healthcare	(16)	Marketing, Advertising, PR	(4)
Education	(13)	Customer Service	(3)
Management	(12)	Engineer	(3)
Self Employed	(8)	Builder	(2)
Sales	(8)	Personal Services	(2)
Financial	(6)	Hospitality	(2)
Computer/ IT	(6)	Insurance Industry	(2)
Trades	(6)	Unemployed	(2)
Homemaker	(5)	Factory	(1)
Government	(4)	Attorney/Seminarian	(1)
		Realtor	(1)

Spring Responses

Retired	(20)	Insurance	(2)
Education	(14)	Sales	(2)
Management	(12)	Social Worker	(2)
Engineer	(8)	State Government	(2)
Financial	(8)	Advertising	(1)
Homemaker	(7)	Assistant Buyer	(1)
IT	(6)	Black jack dealer	(1)
Business Owner	(4)	Cartographer	(1)
Factory Work	(3)	Customer Service	(1)
Food Service	(3)	Dog Groomer	(1)
Laborer	(3)	Entertainer	(1)
Military	(3)	Horticulture Specialist	(1)
Healthcare	(5)	Human Resources	(1)
Real Estate	(3)	Lawyer	(1)
Student	(3)	School Bus Driver	(1)
Admin Assist. Medical Billing	(2)	Technician	(1)
Business Consultant	(2)	Travel Agent	(1)
Criminal Justice	(2)	Video producer	(1)
Defense Contractor	(2)		