Project Summary

Chicago’s dynamic arts and cultural assets have tremendous potential to attract and entertain visitors and support the city’s economic vitality.

Choose Chicago commissioned this study to further develop its understanding of cultural travelers from Chicago’s largest feeder markets with the main goals to:

- Identify feeder markets with the greatest potential for generating new and repeat visitation.
- Develop a comprehensive understanding of how cultural travelers view Chicago’s cultural tourism assets relative to other cities.
- Pinpoint the specific cultural activities with the highest potential for motivating cultural travel to Chicago.
- Reveal if any barriers to visiting Chicago for cultural travel exist.
- Test the potential for arts and culture promotions to impact visitor spending and length of stay.
Methodology

• The study consisted of a comprehensive survey of cultural travelers, or persons who travel specifically to experience a destination’s arts and culture.

• In June 2013, this survey was conducted online by collecting a sample of 400 cultural travelers in each feeder market for a total sample of 4,000.

• Feeder markets included:
  • Cincinnati
  • Dallas-Fort Worth
  • Detroit
  • Indianapolis
  • Iowa (entire state)
  • Los Angeles
  • Milwaukee
  • New York
  • St. Louis
  • Toronto
Definition of a Cultural Traveler

We define cultural travelers to be any traveling adult for whom arts and culture are typically important to their destination selection process.

For this study, a cultural traveler was considered to be any traveling adult for whom any of the following destination attributes were “important” or "very important”:

• Aquariums and zoos
• Architecture or historical buildings
• Art museums
• Churches or attractions of religious significance
• Cultural events or festivals
• Gardens or parks
• Historic sites and attractions
• Live music
• Natural history or science-related museums and attractions
• Theater or the performing arts
• Unique, off the beaten path arts or cultural activities or attractions
What sets cultural travelers apart?

**Cultural travelers travel more for leisure.**

When compared to cultural travelers, survey respondents who are non-cultural travelers report taking fewer leisure trips. When asked how many leisure trips (of 50-miles or more one-way from home) they had taken in the past three years, cultural travelers report having taken an average of 5.5 such trips. Non-cultural travelers who took at least one trip report a much lower average of 4.9 trips.

**Cultural travelers tend to be somewhat younger.**

In total, 38.0 percent of cultural travelers report being 45 years of age or older. Among non-cultural travelers, 52.7 percent are in this age range. The average age of non-cultural travelers is 44.3 years, compared to 40.0 for cultural travelers.

**Cultural travelers are also more affluent.**

In total, 52.8 percent of cultural travelers have an annual household income of $50,000 or more, while only 29.1 percent of non-cultural travelers are in this income stratum.

**Education is a key differentiator.**

When asked about their highest level of formal education, 44.1 percent of cultural travelers reported having at least a college education. Only 23.7 percent of non-cultural travelers have college degrees.

**Cultural travelers are slightly more likely to be married or in a relationship.**

A total of 55.5 percent of cultural travelers are in such a domestic relationship, while 45.3 percent of non-cultural travelers are coupled.
Overall Importance of Cultural Attributes in Destination Selection

Historic sites and attractions is the attribute most widely perceived as important.
### Overall Desired Destination Attributes

<table>
<thead>
<tr>
<th></th>
<th>Important</th>
<th>Very Important</th>
<th>Mean</th>
</tr>
</thead>
<tbody>
<tr>
<td>Value for the money</td>
<td>35.7%</td>
<td>55.3%</td>
<td>4.4</td>
</tr>
<tr>
<td>Variety of things to see and do</td>
<td>43.1%</td>
<td>47.0%</td>
<td>4.4</td>
</tr>
<tr>
<td>Scenic beauty</td>
<td>45.5%</td>
<td>40.9%</td>
<td>4.2</td>
</tr>
<tr>
<td>Relaxing place</td>
<td>45.5%</td>
<td>39.7%</td>
<td>4.2</td>
</tr>
<tr>
<td>Weather</td>
<td>40.1%</td>
<td>43.7%</td>
<td>4.2</td>
</tr>
<tr>
<td>Good hotels</td>
<td>42.4%</td>
<td>36.1%</td>
<td>4.1</td>
</tr>
<tr>
<td>Accessible - Easy to get to</td>
<td>42.3%</td>
<td>31.9%</td>
<td>4.0</td>
</tr>
<tr>
<td>Historic sites and attractions</td>
<td>43.9%</td>
<td>20.6%</td>
<td>3.7</td>
</tr>
<tr>
<td>Aquariums and zoos</td>
<td>42.5%</td>
<td>21.5%</td>
<td>3.7</td>
</tr>
<tr>
<td>Cultural events or festivals</td>
<td>43.9%</td>
<td>19.5%</td>
<td>3.7</td>
</tr>
<tr>
<td>Gardens or parks</td>
<td>44.0%</td>
<td>19.1%</td>
<td>3.7</td>
</tr>
<tr>
<td>Unique, off the beaten path arts or cultural activities or attractions</td>
<td>38.6%</td>
<td>19.7%</td>
<td>3.6</td>
</tr>
<tr>
<td>Shopping</td>
<td>35.5%</td>
<td>21.9%</td>
<td>3.6</td>
</tr>
<tr>
<td>Natural history or science-related museums and attractions</td>
<td>39.1%</td>
<td>16.9%</td>
<td>3.6</td>
</tr>
<tr>
<td>Unique culinary scene</td>
<td>34.7%</td>
<td>19.0%</td>
<td>3.5</td>
</tr>
<tr>
<td>Architecture or historical buildings</td>
<td>37.4%</td>
<td>15.3%</td>
<td>3.5</td>
</tr>
<tr>
<td>Interesting neighborhoods outside of a city’s central area</td>
<td>33.3%</td>
<td>17.4%</td>
<td>3.5</td>
</tr>
<tr>
<td>Live music</td>
<td>32.5%</td>
<td>17.4%</td>
<td>3.4</td>
</tr>
<tr>
<td>Nightlife</td>
<td>29.3%</td>
<td>17.4%</td>
<td>3.3</td>
</tr>
<tr>
<td>Kid friendly</td>
<td>21.2%</td>
<td>24.3%</td>
<td>3.1</td>
</tr>
<tr>
<td>Art museums</td>
<td>24.2%</td>
<td>10.3%</td>
<td>3.0</td>
</tr>
<tr>
<td>Theater or the performing arts</td>
<td>23.8%</td>
<td>10.2%</td>
<td>3.0</td>
</tr>
<tr>
<td>Churches or attractions of religious significance</td>
<td>19.9%</td>
<td>9.7%</td>
<td>2.8</td>
</tr>
</tbody>
</table>

Value for the money, variety of things to see and do, and scenic beauty top the list of important destination attributes.
56.2 percent of all cultural travelers say that arts & culture is “Important” or “Very Important” to planning a leisure trip in Chicago.
Chicago is viewed as an attractive arts and culture destination by cultural travelers, though its esteem is most concentrated in cities geographically closer to Chicago. Following New York, Chicago was mentioned by one third of respondents.
Where is Chicago Popular as a Cultural Destination?

Nearly half of cultural travelers in the Milwaukee, St. Louis and Detroit metropolitan areas wrote in Chicago, while in more distant locations, such as Los Angeles and New York, fewer than one in five cultural travelers thought of Chicago as a response to this question.
Chicago is positively perceived for its arts and cultural assets, but lacks understanding amongst travelers as having a cultural standout or other iconic cultural institution that defines the city—in the way destinations like New York and Washington, DC seem to.

- When asked to rate various arts & cultural attributes of Chicago (and other cities), over half of survey respondents gave Chicago a “Good” or “Very good” rating for each attribute tested.

- Chicago scored highest for its “food & dining,” “architecture and historic buildings,” and “historic sites and attractions.”

- Chicago performs better in metropolitan areas that are geographically closer. For example, 83.4 percent of cultural travelers in Milwaukee consider Chicago’s art museums to be either “Good” or “Very good” while 63.1 percent of cultural travelers in New York feel similarly.
Chicago’s Cultural Assets Vs. Other Cities

- **Art Museums**: Ranked 3rd behind NYC and WDC
- **Architecture and Historic Buildings**: Ranked 3rd behind NYC and WDC
- **Theater and Performing Arts**: Ranked 2nd to NYC
- **Aquariums and Zoos**: Ranked #1, followed by LA and NYC
- **Natural History/Science**: Ranked 3rd behind NYC and WDC
- **Historic Sites and Attractions**: Ranked 3rd behind NYC and WDC
- **Gardens and Parks**: Ranked 4th behind NYC, WDC and SF
- **Festivals and Cultural Events**: Ranked 2nd to NYC
- **Food and Dining**: Ranked 2nd to NYC
- **Live Music**: Ranked 3rd behind NYC and New Orleans
Destinations Visited in the Past 5 Years

Of the domestic destinations tested, Chicago (1) was the city most visited for leisure in the past three years, reported by nearly half of all respondents (44.9%). Las Vegas (2) and New York (3) were also visited for leisure in the past three years by cultural travelers surveyed for this project. These two destinations were visited at least once by approximately thirty percent of cultural travelers.
Visitation to Chicago (Reported by DMA*)

Much of Chicago’s cultural visitor traffic appears to be regionally generated. The Milwaukee (77.1% visitation), Detroit (63.3% visitation), and Indianapolis (60.8% visitation) metropolitan areas were the largest contributors to cultural traveler visitor volume in the past three years. New York, Dallas-Fort Worth, and Los Angeles contributed significantly less.

*Designated Market Areas
Amongst the destinations tested, cultural travelers surveyed for this project are most likely to visit Chicago for leisure purposes in the next three years.
Cultural travelers who reside in metropolitan areas close to Chicago demonstrate a higher likelihood to visit Chicago in the next three years.

Likely visitation is highest in Milwaukee, Detroit and Indianapolis. While likelihood to visit Chicago is least probable in the Los Angeles and the Dallas-Fort Worth areas, one third or more of these cultural travelers still express a likelihood to visit Chicago in the next three years.
Importance of Arts and Culture to Interest in Visiting Chicago (Reported by DMA*)

Half or more of all cultural travelers in each metropolitan area consider arts & culture to be “Important” or “Very important” to their interest in visiting Chicago.

*Designated Market Area
Top Cultural Activities on Leisure Trips (Past 3 Years)

Presented a list of arts and culture-related activities, survey respondents identified those that they had participated in while on leisure trips in the past 3 years:

• 53.4% visited an aquarium or zoo
• 52.6% visited a historic building
• 52.3% visited a garden or park
• 51.2% explored a neighborhood of a large city beyond downtown areas
Cultural travelers show a high propensity to travel to experience specific arts and culture-related activities. More than one in four of those surveyed say they have taken a trip:

- To visit a garden or park in the destination (28.3%)
- To visit a specific garden or park (26.9%)
- To watch a live music performance (26.6%)
- To attend a festival or special event (24.2%)
Familiarity with Chicago’s Cultural Assets

While cultural travelers expect Chicago to have a good arts & culture scene, most lack a meaningful knowledge of Chicago’s actual arts & culture assets.

- While Chicago was highly rated for its arts & cultural attributes, unaided awareness of Chicago’s arts & culture attractions is low.

- Cultural travelers surveyed were asked to write-in (in an open-ended format) the arts, cultural or historic attractions or activities that first come to mind when they think of Chicago. Few survey respondents were actually able to recall many Chicago arts & culture attractions.

- The typical survey respondent was able to list only 1.7 attractions or activities. Furthermore, 34 percent were not able to give a single response.
Satisfaction with Arts & Cultural Attractions in Chicago

Cultural travelers who visited Chicago for leisure in the past five years were asked to report their satisfaction with Chicago’s arts & cultural attractions during their most recent visit.

- The majority of these travelers were “Satisfied” (38.3%) or “Very satisfied” (44.4%) with the arts & cultural attractions they visited in Chicago.

- 8.6 percent reported that arts & culture were not a part of their most recent trip to Chicago.
Opportunity of Repeat Visitation

- While cultural travelers visit Chicago for leisure purposes, repeat visitation is most common from those who live in nearby metropolitan areas.
  - Cultural travelers took an average of 2.1 leisure trips to Chicago in the past five years.
  - Those who live in Milwaukee, by far, took the most leisure trips to Chicago. On average, cultural travelers from Milwaukee took 5.3 trips to Chicago.
  - Conversely, those who live in the Dallas-Fort Worth area typically made 0.8 trips to Chicago in the past five years.
Number of Leisure Trips to Chicago (Past 5 Years - Reported by DMA*)

Cultural travelers who reside in metropolitan areas close to Chicago visit the city more often.

- Milwaukee: 5.3
- Indianapolis: 2.7
- Detroit: 2.4
- Iowa: 2.4
- St. Louis: 1.9
- New York: 1.7
- Cincinnati: 1.4
- Los Angeles: 1.2
- Toronto: 1.1
- Dallas-Fort Worth: 0.8

*Designated Market Area
Opportunity for Growth

• The cost of visiting Chicago appears to be one of the primary reasons that cultural travelers do not visit more frequently.
  • Over one-third of cultural travelers say that they would visit Chicago more frequently if not for the expense (37.3%).
• Appears to be considerable room to grow visitation through consumer education, effective marketing and brand development.
  • 23.9% report that Chicago is “not on their radar”
  • 22.5% are not “up-to-date on what’s happening in Chicago”
  • 20.2% “don’t know enough about Chicago”
When asked how long an ideal leisure trip to Chicago would take, cultural travelers said 3.2 nights on average.

Cultural travelers who live farther away from Chicago would likely spend more nights in the city.
Total budget for an ideal leisure trip to Chicago

- The majority of cultural travelers, 74.2 percent, report that they would stay in a Chicago hotel, motel or inn during a leisure trip.

- While the total budget for an ideal leisure trip to Chicago varies by metropolitan area of residence, cultural travelers in all areas tested would budget over $1,000.

- On average, cultural travelers would budget $1,021.24 for their Chicago trip. The bulk of this spending would go towards lodging ($285.10), followed by restaurants ($209.72) and shopping ($180.97). $115.00 of this budget would be allotted for arts and cultural attractions.
As seen in the number of nights for an ideal trip, cultural travelers who live in areas that are geographically farther away from Chicago would budget more for a Chicago trip, whereas those who live closer to Chicago would budget less.

On average, those who live in Toronto would budget $1,628.35 for a Chicago trip, compared to $1,129.03 for those who live in Milwaukee.
Budget for an Ideal Leisure Trip to Chicago per Person, per Day (Reported by DMA*)

When taking into account the average number of travelers and average number of trip days covered by the total budget, cultural travelers who live closer to Chicago have the greatest economic impact.

The typical traveler from Milwaukee would spend $258.38 per day during their ideal leisure trip to Chicago. The typical traveler from Los Angeles would spend $176.25 per day.

*Designated Market Area