



CINCINNATUS

STRATEGY • LEADERSHIP • SOLUTIONS

## **Visitor Intercept Study**

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**For The St. Anthony Heritage Zone**

July 7, 2009



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# **Executive Summary**

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# Background and Study Objectives

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**Cincinnati is partnering with the Heritage Board on a six-phase interpretive and development project, with identification of current audiences the current step.**

- Accordingly, a Visitor Intercept Interview was designed and implemented to identify audience segments and their likely motivations and expectations of the Riverfront district.
- These results are provided in the current July 2009 report.

**The Visitor Survey includes objectives to investigate their behaviors, attitudes and improvement suggestions:**

- Define visiting behaviors in terms of:
  - Activities planned or engaged in
  - Mode of transportation to Riverfront area
  - Frequency of visits and time spent
  - Accompanying friends/family
  - Demographics
- Determine visitors' attitudes toward:
  - Most important Riverfront attribute
  - Interest in potential improvements or changes
  - Preferred sources of information about the area
- Compare behaviors and attitudes by Local Residents, Other Metro and Outside Metro Visitors
- Identify improvement suggestions

# Methodology: Intercept Survey

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## Data Collection

- In-person intercepts over two time periods: April 30 - May 6, 2009 and June 12 -19, 2009
- Four different time periods each day: morning, mid-day, afternoon, evening (5 pm to dusk)

## Survey Sampling

- Interviewers approached a total of 1,228 people in the Riverfront area, seeking:
  - Males and females
  - Variety of ages and ethnicities
  - Appear to be 16 years or older
- Minimum quotas of 30 people were established for each of 8 locations: 4 on the University and 4 on the Minneapolis side of the river.
- As a participation incentive, survey participants' names were entered into a drawing for \$100.
- A total of 416 interviews were completed.

<b>Disposition</b>	<b>Wave 1: April 30 to May 6 2009</b>	<b>Wave 2: June 11 to 17 2009</b>	<b>Total</b>
Total Intercepts	546	682	1,228
Total Discontinues	334	478	812
<b>Completes</b>	<b>212</b>	<b>204</b>	<b>416</b>

# Key Findings: Visitor Demographics

## Riverfront visitors are most likely to be white, middle-aged, well-educated people identified as Other Metro Area residents.

- Ethnic representation of visitors generally matches results from the 2000 Census for the Minneapolis St. Paul Metropolitan area.
- On average, visitors from outside the Metro Area are significantly older (47 years) than Local Residents and Other Metro Areas (42 years).
- Education levels of Riverfront visitors are remarkably high, with 1 in 4 (26%) having attained a post-graduate degree.

Residency	
Local Residents*	33%
Other Metro Area	48%
Outside Metro Area**	20%
Gender	
Male	57%
Female	43%
Ethnicity	
White	83%
Non-white	17%
Age	
<b>Mean Age</b>	<b>43.2</b>
<25	14%
25 to 44	38%
45 to 64	41%
65+	7%
Education	
Some College or Less	36%
College Degree or Higher	64%

Base

416

\*Local Residents defined by zips: 55401, 55402, 55413, 55414, 55415, 55418, 55454, 55455.

\*\*Includes 16 visitors without US zip codes, assumed to live out of the country.

## Key Findings: Activity Profile

### **Exercise is the predominant Riverfront activity, with walking listed by nearly 3 of 4 (72%) visitors.**

- Nearly half (45%) enjoy the local scenery and looking around. Many (39%) simply explore and wander.
- Commercial spending on local goods and services stands as a third-place activity, followed by historical and educational pursuits.
- One in five (19%) mentions crossing the Stone Arch Bridge – an apt icon for this area.

General Activity Categories	
Exercise	78%
Scenic/Look Around	45%
Commercial (Restaurants, Clubs, Shopping, Tours, Productions)	23%
History and Education	15%
Top-Mentioned Activities	
Walking	72%
Exploring/wandering/looking	39%
Walking Stone Arch Bridge	19%

Base

416

### **Visiting frequency is robust. On average, visitors come to the Riverfront area 7 times\* each year and stay about 2 hours.**

- Outside Metro Area visitors come to the area significantly less often than others, yet still average 3 visits per year.
- Walking (45%) or driving (41%) to the area is evenly split, primarily by those who reside in the immediate area and those who do not. Notably, 1 in 14 (7%) bike and (7%) take public transportation.
- Longest visits are recorded by visitors from outside the Metro Area (2.8 hours) and first-time-ever visitors (2.6).

# Key Findings: Attributes and Improvements

## Visitors value the Riverfront’s scenery more than any other attribute.

- With nature listed as the second-most important attribute, it is obvious that the Riverfront’s natural setting is a remarkable attraction to residents, as well as both local and outside tourists.
- Opportunities to exercise and take in historical information are highly regarded by smaller numbers of visitors.
- Again, the commercial factor holds somewhat limited appeal.

Most Important Attribute	
Scenic Views	41%
Nature	21%
Exercise	15%
History	14%
Other (Art, Dining, Shopping)	10%
Base	416

## New or improved facilities stand out as top improvement suggestions, underscoring visitors’ robust use of Riverfront amenities.

- More restrooms (26%), parking (8%) and drinking fountains (8%) head the list.
- Likewise, restaurants and food kiosks (both 7%) are recurring suggestions.
- “Green” is described as limits on construction, more gardens, trees and grass.
- A favorable indicator, nearly 1 in 4 (23%) say there is “nothing at all” they’d like to change.

General Improvements	
Facilities/Amenities	59%
Commercial	15%
Green/Scenic	13%
Cleanliness/Maintenance	11%
Events	9%
Safety	7%
<i>Nothing at all</i>	23%
Base	315



## Key Findings: Interest in History and Possible Changes

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### **Most visitors (88%) are aware of the Riverfront's historic designation.**

- A solid majority claim to "love" history (73%) and would like to learn more about the area (60%).

### **While interest in potential programs is mixed, three strong opportunities emerge for future consideration.**

- Water recreation, information on natural resources and programs on area American Indians garner most appeal.

Improvements/Changes*	
<b>Canoes/kayaks/water taxis</b>	<b>66%</b>
<b>More information on natural resources</b>	<b>63%</b>
<b>Programs on area American Indians</b>	<b>52%</b>
Visitor and Orientation Center	49%
Programs on area industries/transportation	46%
Programs on people who lived/worked here	41%
More guided tours	29%
Audio tours	21%

Base

416

### **Websites are the go-to source for information on Riverfront activities.**

- Nearly half (48%) prefer to seek information online, compared to posted signs (13%), newspaper or friends and family (both 9%).

\*Percent assigning 5 to 6 on 6-point interest scale.



## **Detailed Findings**

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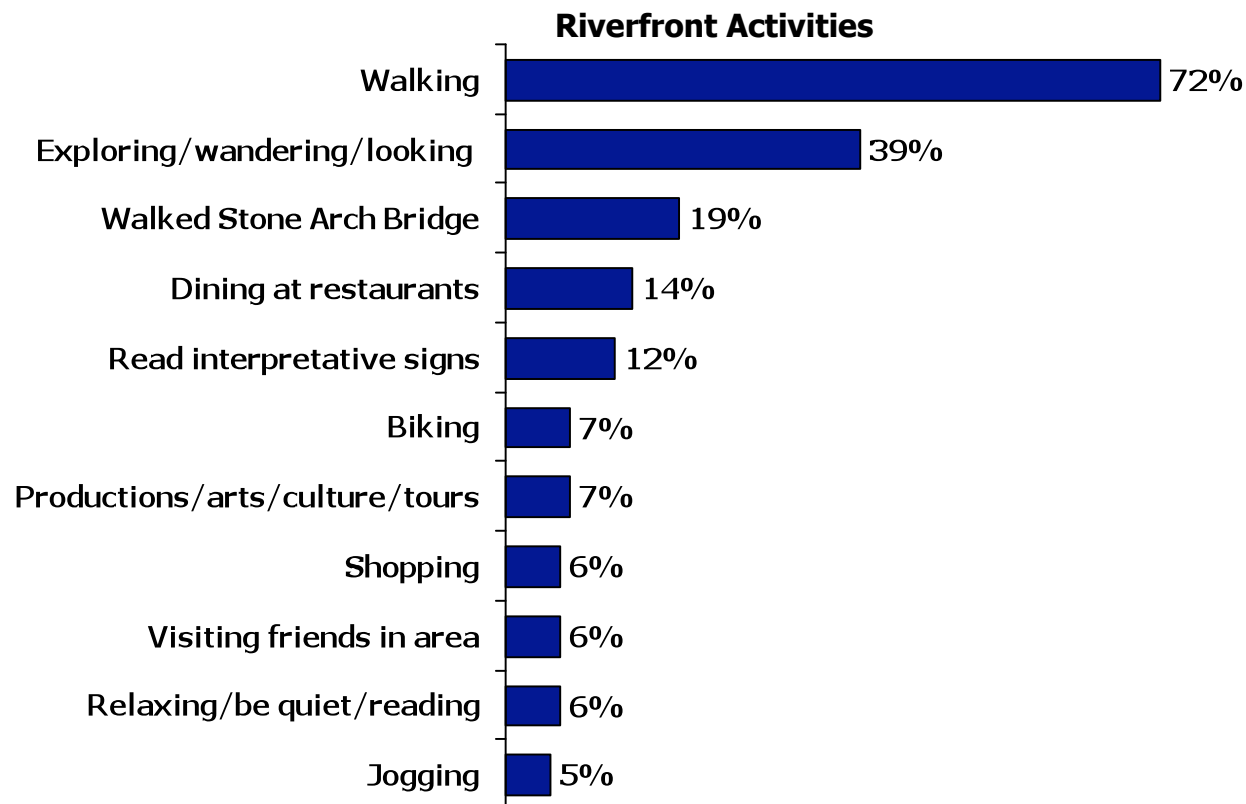
# **Riverfront Usage and Activities**

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## Top-Mentioned Riverfront Activities

**Active pursuits receive highest mention overall. Physical endeavors – walking (72%) and exploring (39%) – are top-listed Riverfront activities.**

- Other activities of the day span a variety of interests – scenic viewing from the bridge (19%), restaurant dining (14%) and history/education (12%).



Base = 416

Q3. What have you done and/or what do you plan to do in the Riverfront area today?

Note: Only activity mentions  $\leq 5\%$  shown above.

# All Riverfront Activities

<b>Exercise (net)</b>	<b>78%</b>
Walking	72%
Biking	7%
Jogging	5%
Rollerblading	1%
<b>Scenic/Look Around (net)</b>	<b>45%</b>
Exploring/wandering/looking around	39%
Walked on/crossed Stone Arch Bridge	19%
<b>Commercial (net)</b>	<b>23%</b>
<b>Restaurants/Clubs</b>	<b>15%</b>
Dining at restaurants	14%
Going to nightclubs	1%
<b>Shopping</b>	<b>6%</b>
Farmer's Market	4%
Shopped area stores or galleries	2%
<b>Productions/Arts/Culture</b>	<b>4%</b>
Attended theater productions	3%
Attended special events: concerts or fairs	1%
<b>Tours</b>	<b>3%</b>
Boat ride	2%
Any guided walking tour	1%
<b>History and Education (net)</b>	<b>15%</b>
Read interpretative sign about history of area	12%
Visited Mill City Museum	4%
Took a class	1%

## Visitors name nearly 30 different activities that they do while in the Riverfront area.

- By grouped categories, exercise (78%) easily leads all other activities, followed by scenic viewing (45%).
- Commercial transactions (23%) and historical/educational pursuits (15%) are mentioned less often.

<b>Other (net)</b>	<b>16%</b>
Visited friends who live in Riverfront area	6%
Relaxed/ be quiet/read/meditate/people watch	6%
Drink coffee/eat lunch	2%
Fishing	2%
Wedding/festivities/private party	1%
BBQ/picnic	1%
Attend the game	1%
View lock and dam	1%
Attend meeting	1%
Play with kids/watch at playground	1%

Base

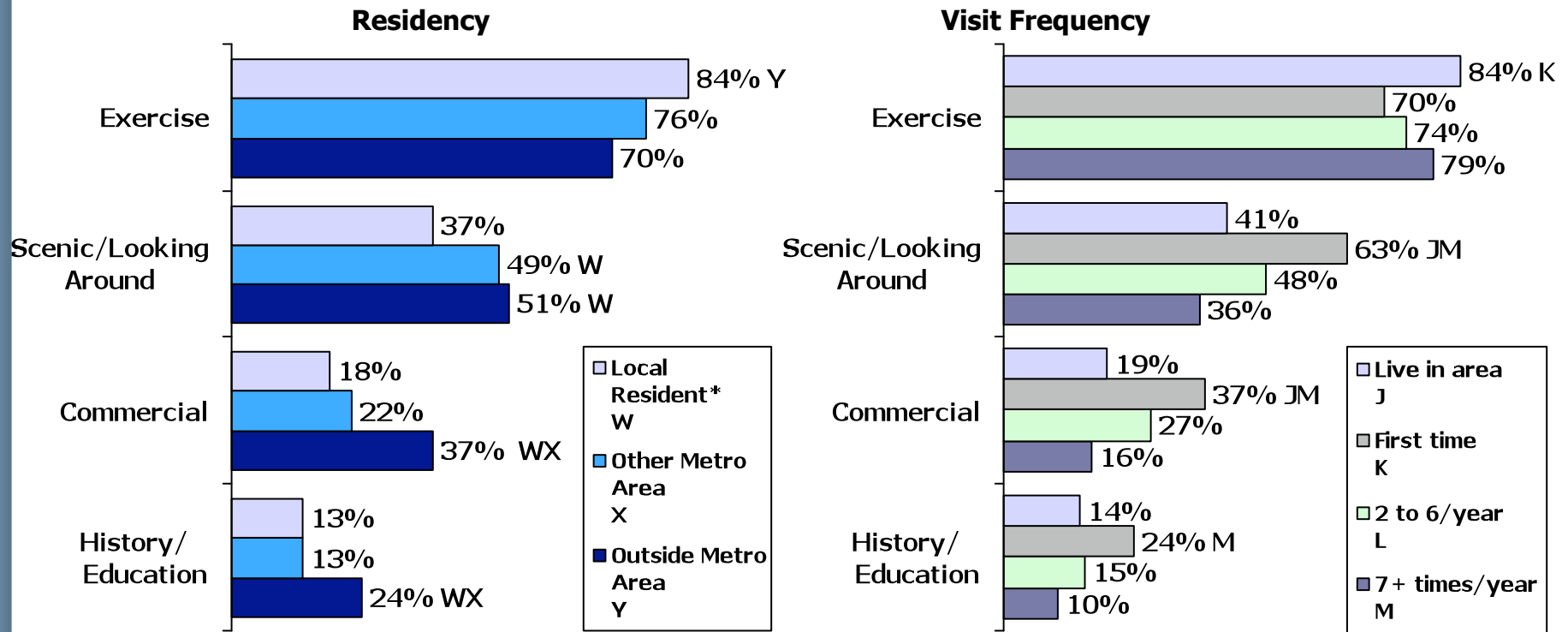
416

Q3. What have you done and/or what do you plan to do in the Riverfront area today?

# Riverfront Activities—by Residency and Visit Frequency

**Local residents are most likely to be exercisers. Significantly more visitors living outside the Metro Area, as well as first-time visitors, report a wider range of activities.**

- No differences in activities are evident by age, ethnicity or gender demographics.



Base = 416

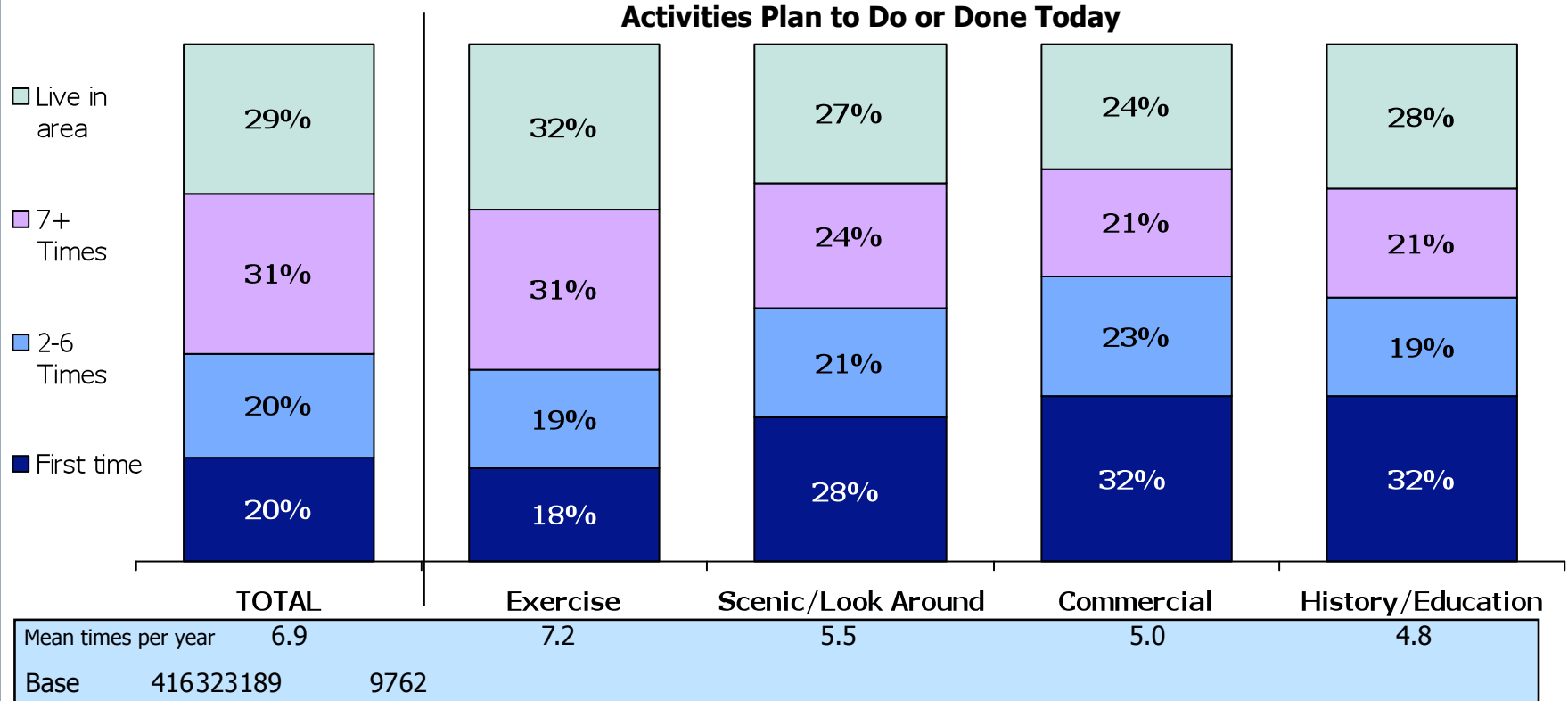
Q3. What have you done and/or what do you plan to do in the Riverfront area today?  
 Letters indicate significantly higher than another category at a 95% confidence level.

\*Local Residents defined by zips: 55401, 55402, 55413, 55414, 55415, 55418, 55454, 55455. "Live in area" is self-reported and may be different.

# Number of Visits—by Riverfront Activities

**On average, visitors stop by the Riverfront area nearly 7 times each year.\***

- For one in five (20%) visitors, the interview date marks their first ever visit to the area.
- Exercisers are more likely to be frequent visitors (7+ times) or live in the Riverfront area, compared to visitors who are enjoying the scenery, paying for food/events/tours (commercial) or learning more about the area (history/education).



Q1. In the past 12 months, approximately how many times have you visited the Minneapolis Riverfront area – or do you live in the area?

Q3. What have you done and/or what do you plan to do in the Riverfront area today?

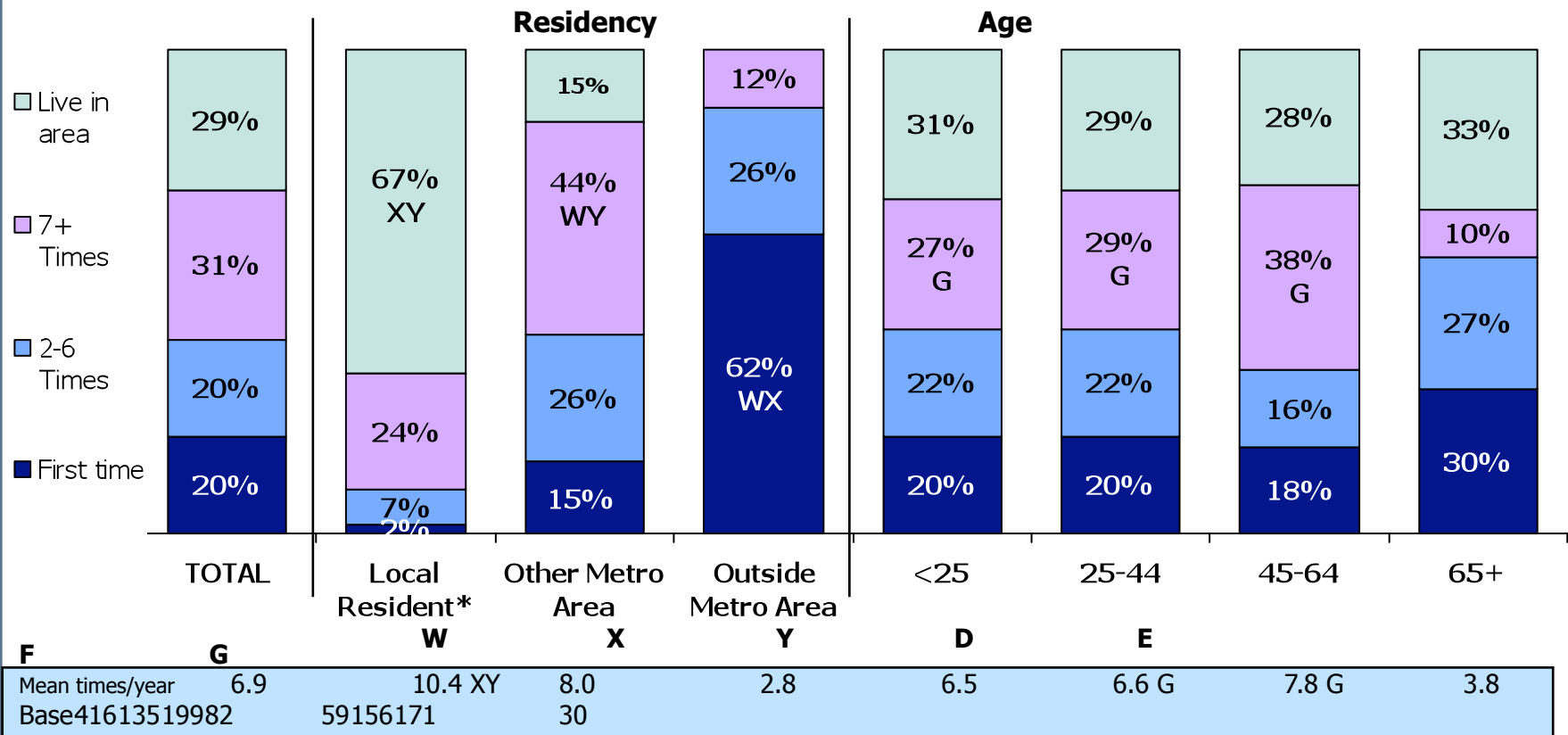
Note: No significance testing conducted due to multiple responses for Q3. What have you done/planning to do today?

\*Survey participants who live in area are excluded from average number of visits.

# Number of Visits—by Residency and Age

**Local and Other Metro Area residents average at least 8 visits annually. Even those living outside the Metro Area visit nearly 3 times each year.**

- Visiting frequency is similarly robust across most age groups, with the exception of the 65+ group who average significantly fewer visits every year (3.8).



Q1. In the past 12 months, approximately how many times have you visited the Minneapolis Riverfront area – or do you live in the area?

Letters indicate significantly higher than another category at a 95% confidence level.

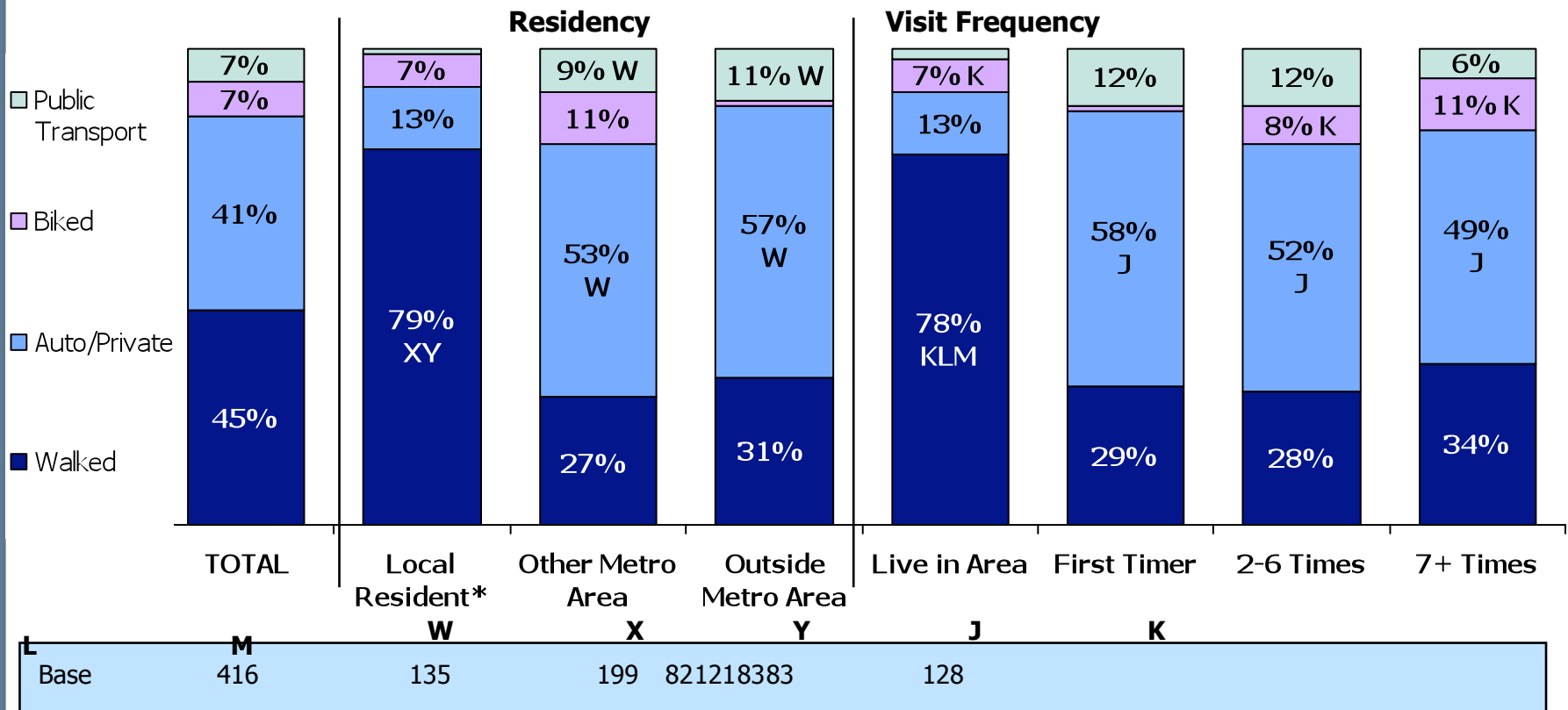
\*Local Residents defined by zips: 55401, 55402, 55413, 55414, 55415, 55418, 55454, 55455. Those who live in area excluded from average number of visits.



# Mode of Transportation—by Residency and Visit Frequency

**Not unexpectedly, walking to the Riverfront is most common for Local Residents while driving is typical for those living outside the district.**

- Important to note, roughly 1 in 14 (7%) are biking and (7%) are taking public transportation.
- Among frequent (7+ times/year) visitors, the biking rate is highest (11%).



Q2. What mode of transportation brought you to the Riverfront area today?

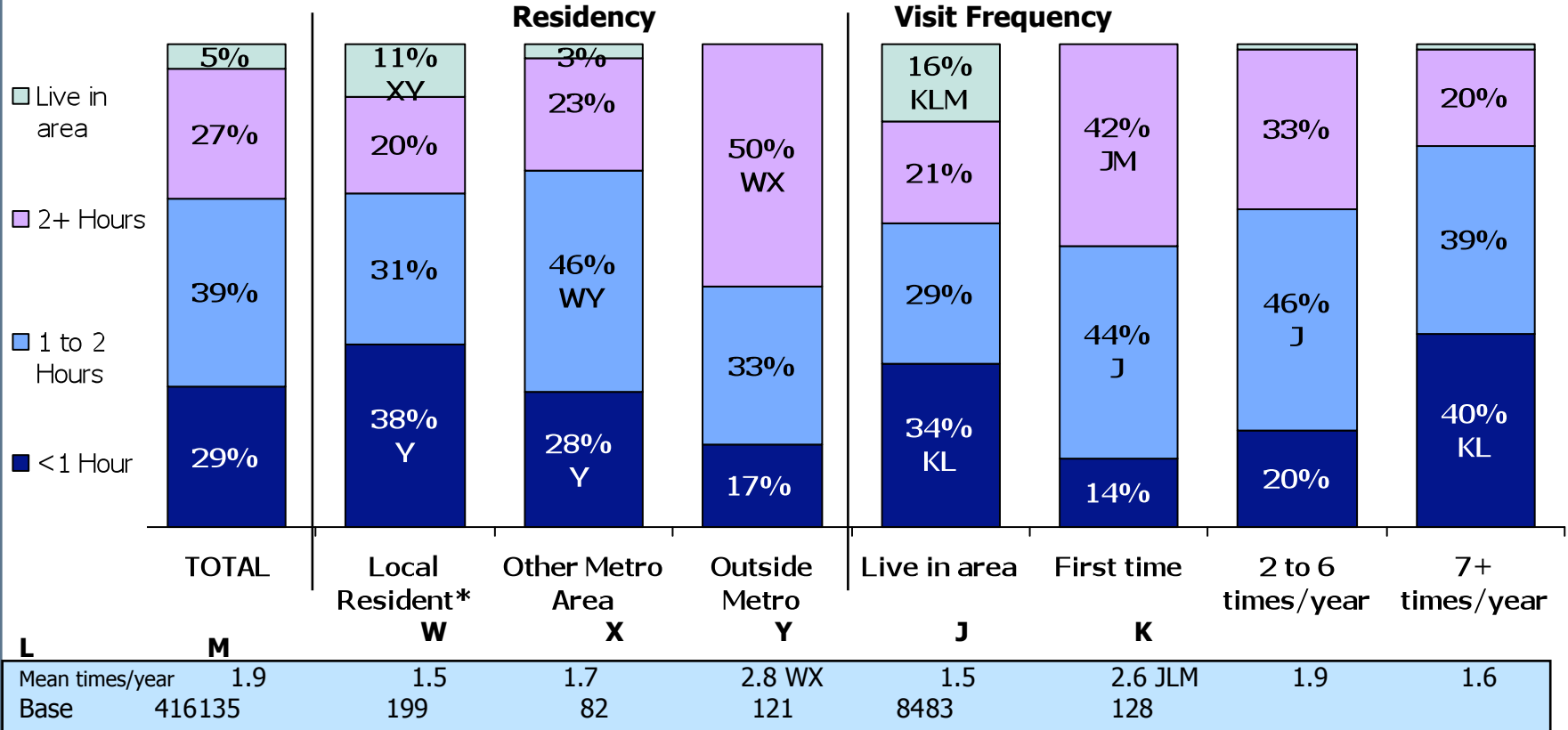
Letters indicate significantly higher than another category at a 95% confidence level.

\*Local Residents defined by zips: 55401, 55402, 55413, 55414, 55415, 55418, 55454, 55455. "Live in area" is self-reported and may be different.

# Duration of Visit—by Residency and Visit Frequency

**Overall, visitors spend an average of 2 hours at the Riverfront area.**

- Not surprisingly, visitors who live outside the Metro Area (2.8 hours) and those who are coming for the first time (2.6 hours) average significantly more time in the area.
- No differences are evident by visitors' age, ethnicity, gender or planned activities for the day.



Q4. How long, in total, do you expect your visit to be today?

Letters indicate significantly higher than another category at a 95% confidence level.

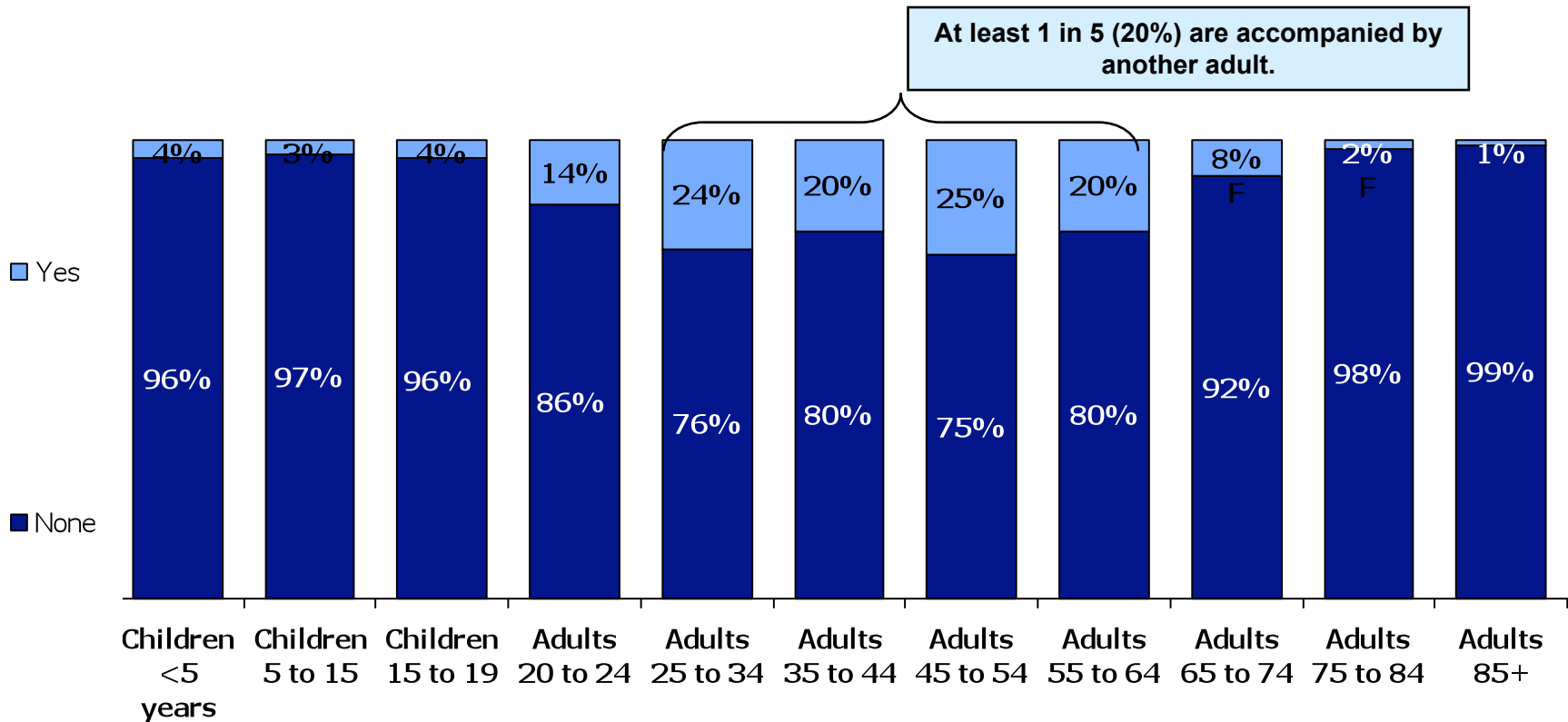
\*Local Residents defined by zips: 55401, 55402, 55413, 55414, 55415, 55418, 55454, 55455. "Live in area" is self-reported and may be different.

# Companions at Riverfront Area

## Visiting with other adults is most common among adults in the 25 to 64 year-old groups.

- Very few children (3% to 4%) accompany their parents or other adults while visiting the Riverfront area.

Companions Accompanying Riverfront Visitors



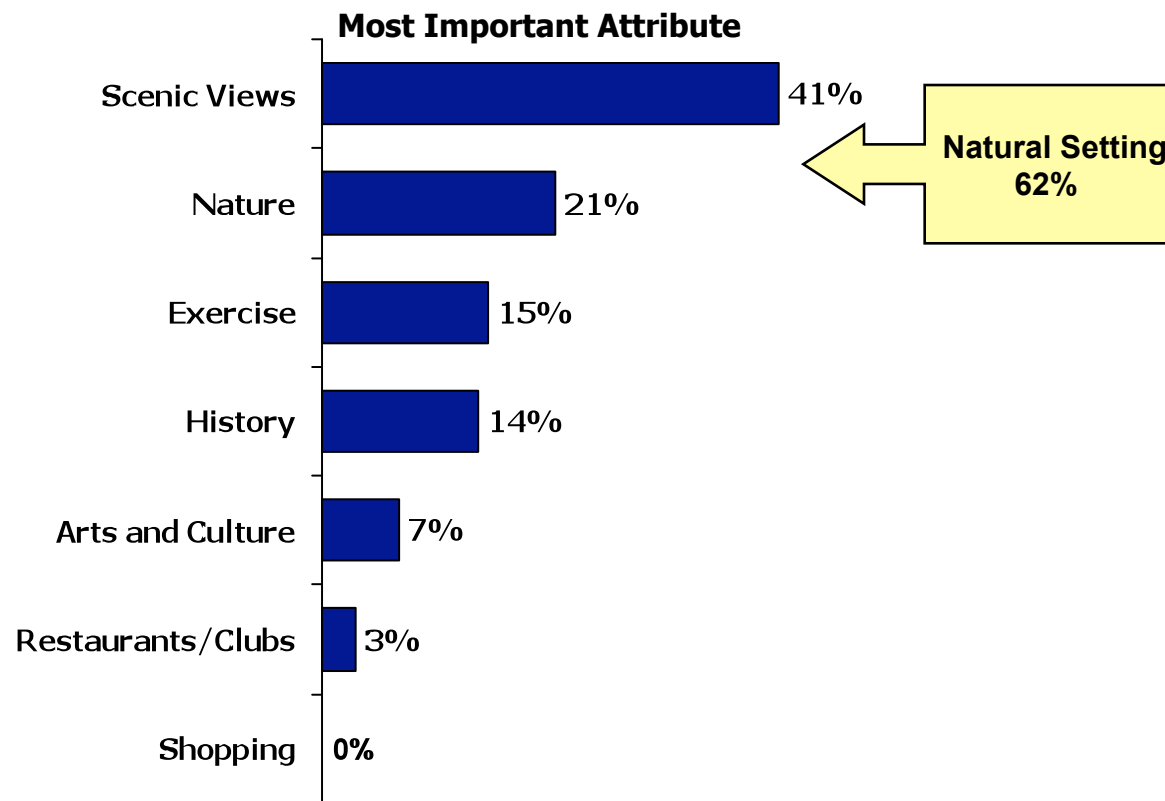
Base=415

Q12. As I read a list, please tell me how many people, including yourself, are with you today in each age category?

# Most Important Riverfront Attributes

## Twice as many visitors value Riverfront's scenic views as any other factor.

- When asked to select the "most important" Riverfront attribute, 3 of 5 (62%) choose the area's natural setting – its scenic environment and nature.
- While Exercise (15%) and History (14%) place second in importance, Arts and Culture (7%) and Restaurants/Clubs (3%) garner considerably less value. Shopping does not meet anyone's idea of a most important attribute.



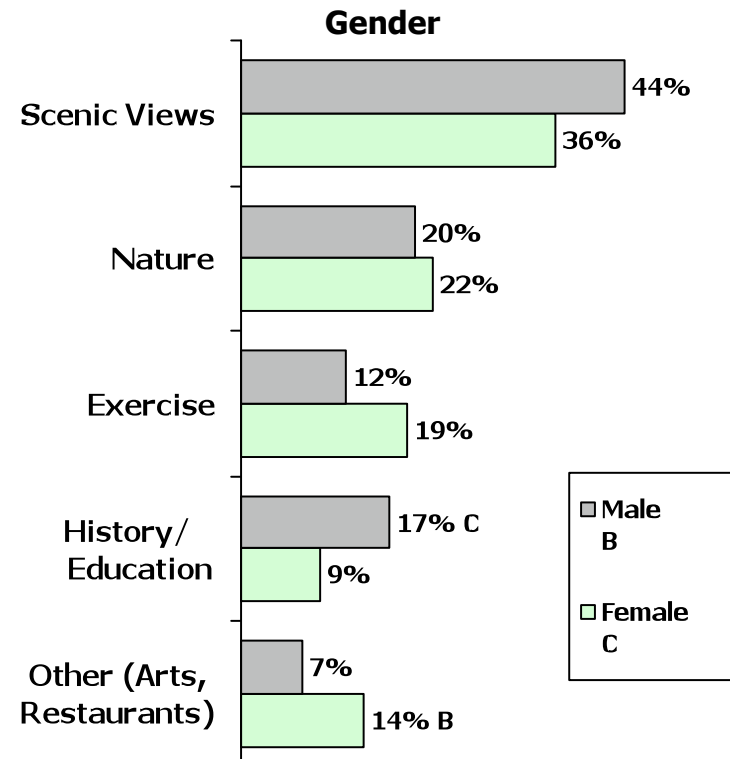
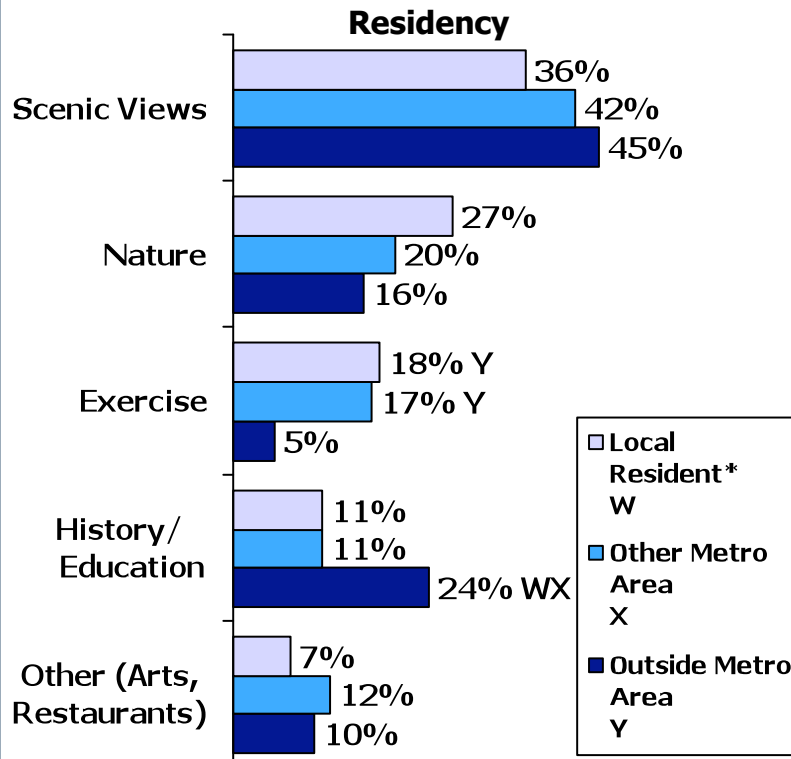
Base = 416

Q5. Of the following list, which attribute of the Riverfront area is most important to you?

# Most Important Attributes—by Residency and Gender

## Scenic views are most important to all visitors, no matter their residency.

- Local (18%) and Metro area residents (17%) assign significantly stronger value to exercising.
- Riverfront’s history is especially important to visitors from outside the Metro Area (24%).
- Significantly more men (17%) than women (9%) value history and education, whereas women (14%) find other activities (arts, restaurants, clubs) more important than men (7%).



Base = 416

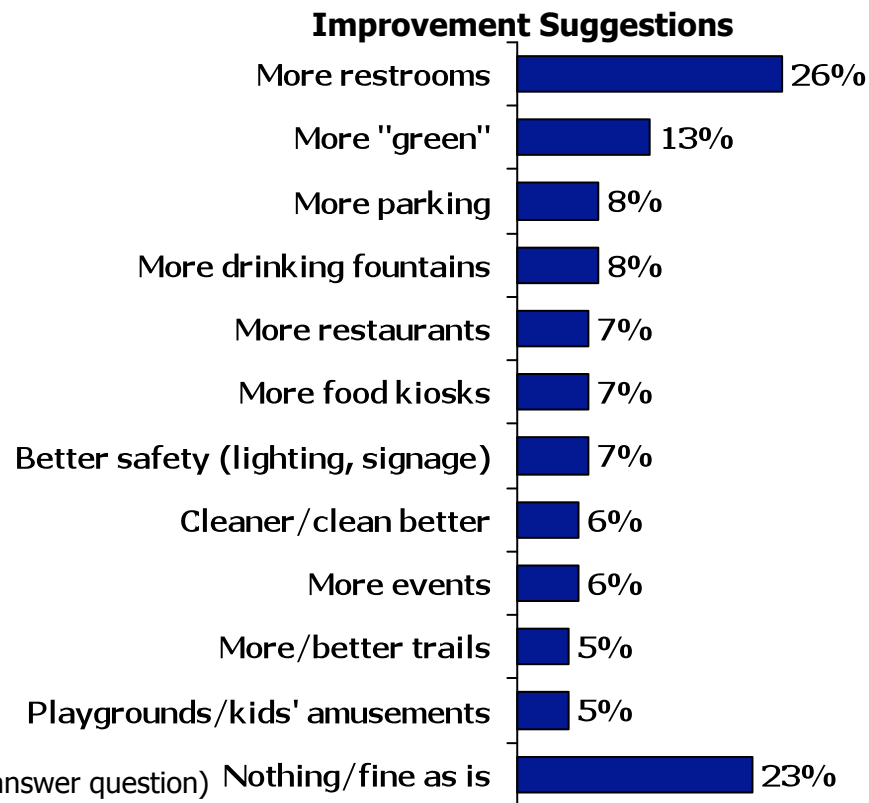
Q5. Of the following list, which attributes of the Riverfront area are most important to you?  
 Letters indicate significantly higher than another category at a 95% confidence level.

\*Local Residents defined by zips: 55401, 55402, 55413, 55414, 55415, 55418, 55454, 55455.

# Top-Mentioned Improvements to Riverfront Area

## More restrooms and "green" areas top the list of suggested improvements.

- One of four visitors (26%) would like more restrooms provided in the area.
- Visitors describe "green" as limits on building development, more gardens, trees and grass.
- A sizeable group (23%) say there is "nothing at all" they would like to add, change or improve.
- No significant differences are evident by residency, visiting frequency or demographics.



Base = 317 (99 did not answer question) Nothing/fine as is 23%

Q6. What additions, changes, improvements or amenities would you like to see made for this area?

Note: Only suggestions  $\leq 5\%$  shown above.

# All Riverfront Improvement Suggestions

<b>Facilities/Amenities (net)</b>	<b>59%</b>
More restroom facilities	26%
More parking	8%
More drinking fountains	8%
More/better picnic areas	7%
Playground/kids' amusements	5%
More trails/longer/better/maintained better	5%
Visitor/Orientation Center	4%
Bike paths/ more/ separate/ better	4%
Free parking/ free parking on weekends	3%
Better road/sidewalk/trail surfaces	3%
Maps	3%
Mini-golf/bike rental/roller blade park/pool	2%
<b>Commercial (net)</b>	<b>15%</b>
More restaurants	7%
More food kiosks	7%
More/better shopping/vendors	3%
More art/galleries	1%
<b>Green/Scenic (net)</b>	<b>13%</b>
Limit building/development	4%
More gardens/flowers/colorful landscape	3%
More grass/grass greener	2%
Eliminate lock and dam/steam plant	1%
Improve look of existing buildings	1%
Encourage wildlife/ maintain them	1%

**Facility improvements and additional amenities (59%) garner most suggestions from Riverfront visitors.**

<b>Cleanliness/Maintenance (net)</b>	<b>11%</b>
Clean/clean better/clean specific locations	6%
Eliminate dog/horse waste/ provide bags	2%
Cleaner water/river	2%
More trash cans	2%
<b>Events (net)</b>	<b>9%</b>
More events	7%
More concerts	4%
<b>Safety (net)</b>	<b>7%</b>
More/better lighting	3%
More/better signage	3%
More/better security	2%
<b>Nothing/Fine as is</b>	<b>23%</b>
Don't know	9%

Base

316

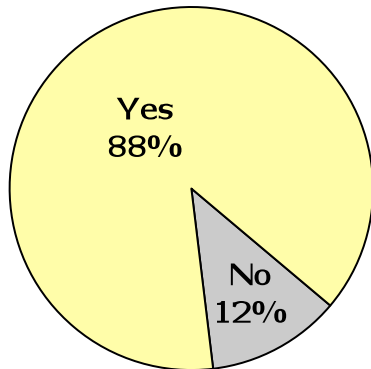
Q6. What additions, changes, improvements or amenities would you like to see made for this area?

# History—Awareness and Interest

**The great majority of visitors (88%) are aware of Riverfront’s historic designation. Many “love” history (73%) and would like to learn more (60%).**

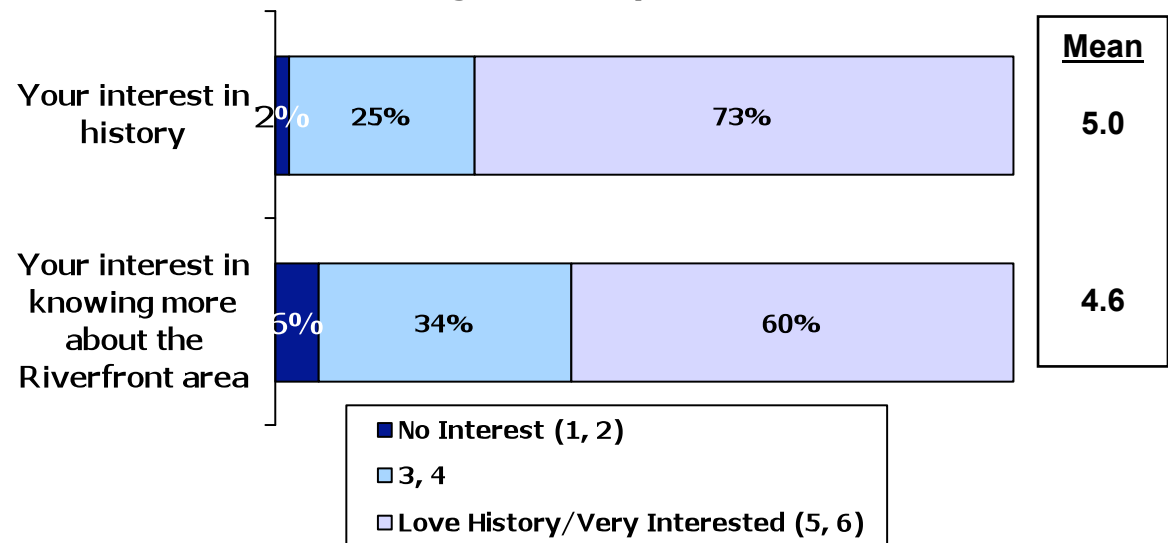
- As may be expected, more first-time visitors (32%) are likely to be unaware of its historic designation.
- Likewise, significantly more Local Residents (70%) voice interest in learning more about the Riverfront area. No other differences are noted among visitor groups (age, gender, etc.).

**Aware of Designated Historic District**



**Significantly Higher “No”**  
First-time visitors 32%

**Interest Ratings in History and Education**



Q7. Were you aware that this is a designated historic district?

Q8. On a scale of 1 to 6 (1=no interest in history and 6=love anything related to history), which number would best describe your interest in history?

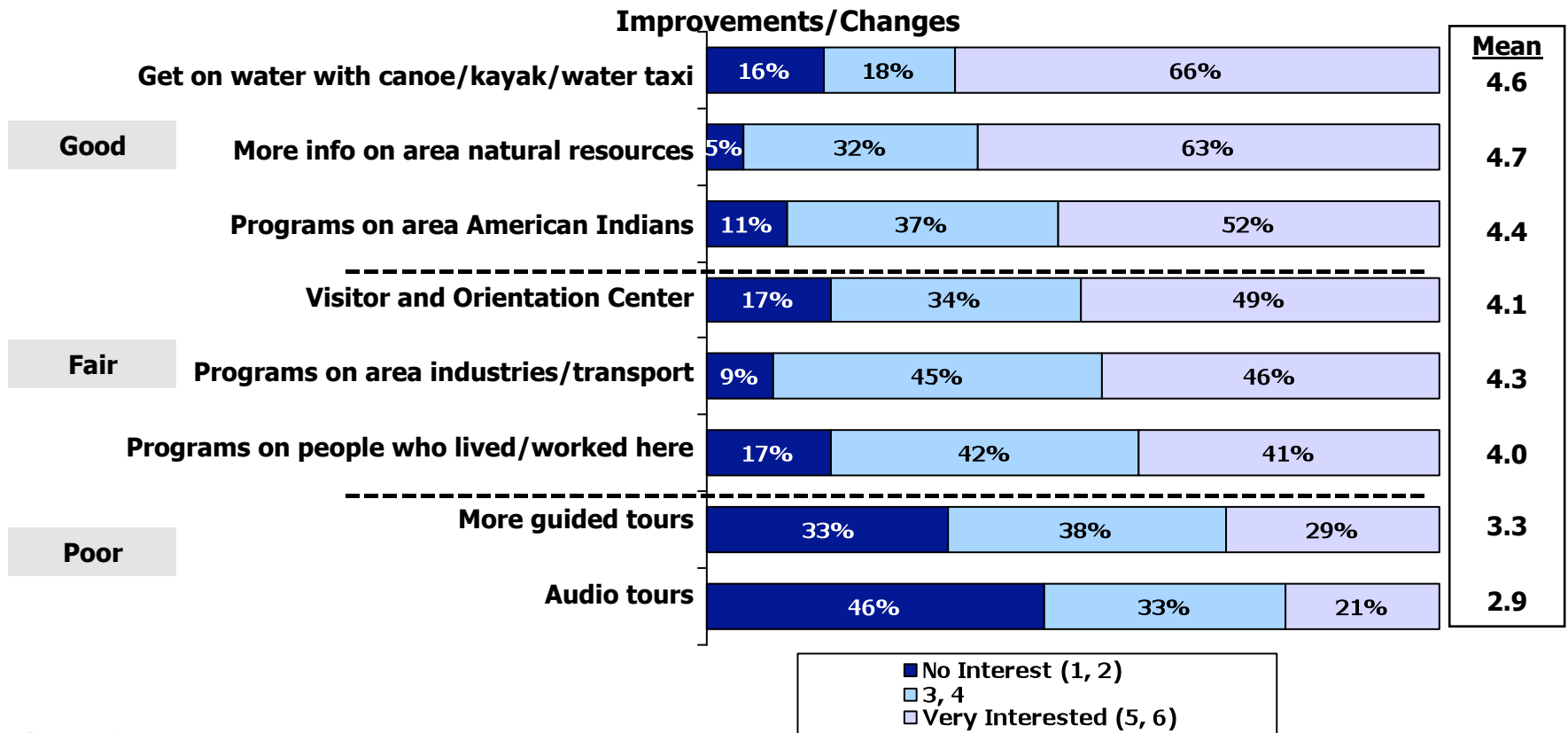
Q9. On a scale of 1 to 6 (1=not at all interested and 6=very interested), which number would describe your interest in knowing more about the Riverfront area?



# Interest in Improvements/Changes in Riverfront Area

## Interest in specific improvements falls into 3 tiers – good, fair and poor.

- Ideas generating highest interest include water recreation (66%), as well as information on area natural resources (63%) and American Indians (52%).
- Moderate enthusiasm is cast for a Visitor Center (49%) and historical programs on industries and transportation (46%) and people (41%).



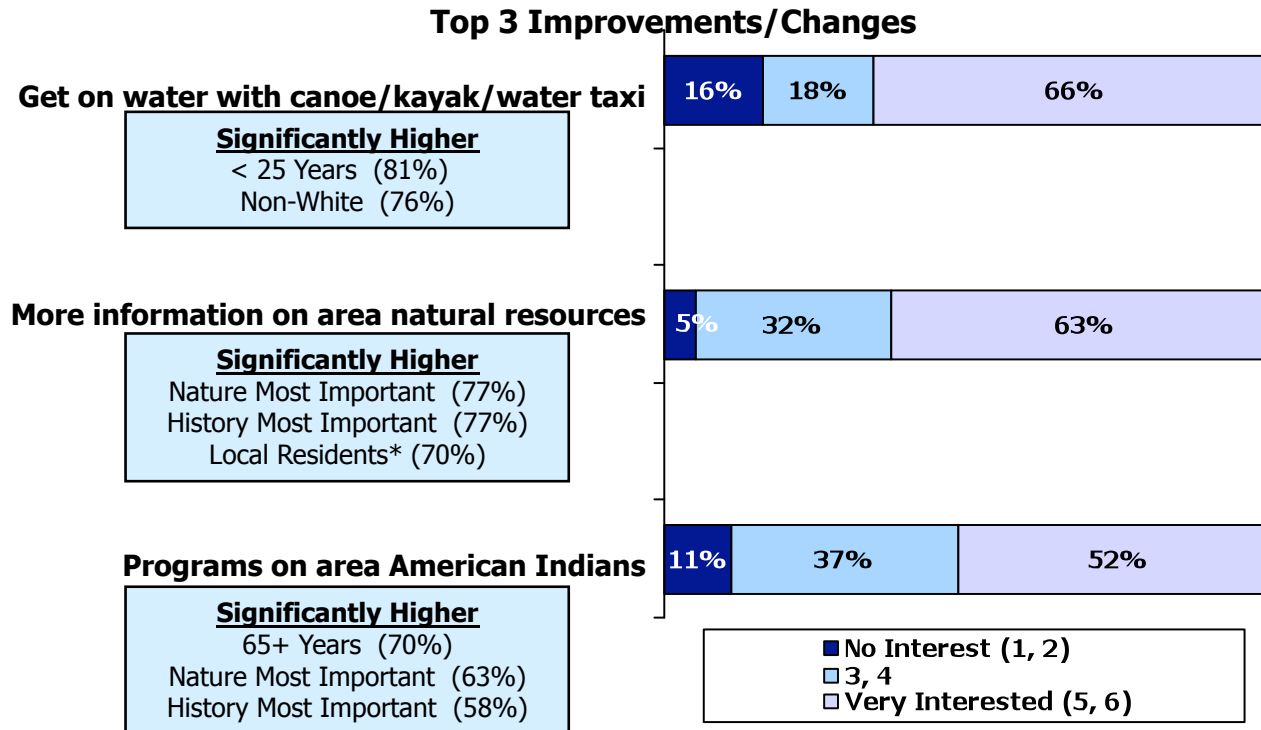
Base = 416

Q11. On a scale of 1 to 6 (1=not at all interested and 6=very interested), which number would best describe how interested you are in the following improvements or changes in the Riverfront area?

# Top Interests Among Specific Visitor Categories

## Certain groups drive stronger interest in specific Riverfront improvements.

- Significantly more young people (<25 years) and non-whites like the idea of available water activities in the area.
- More people who value nature and history are likely to convey interest in programs on natural resources and American Indians.



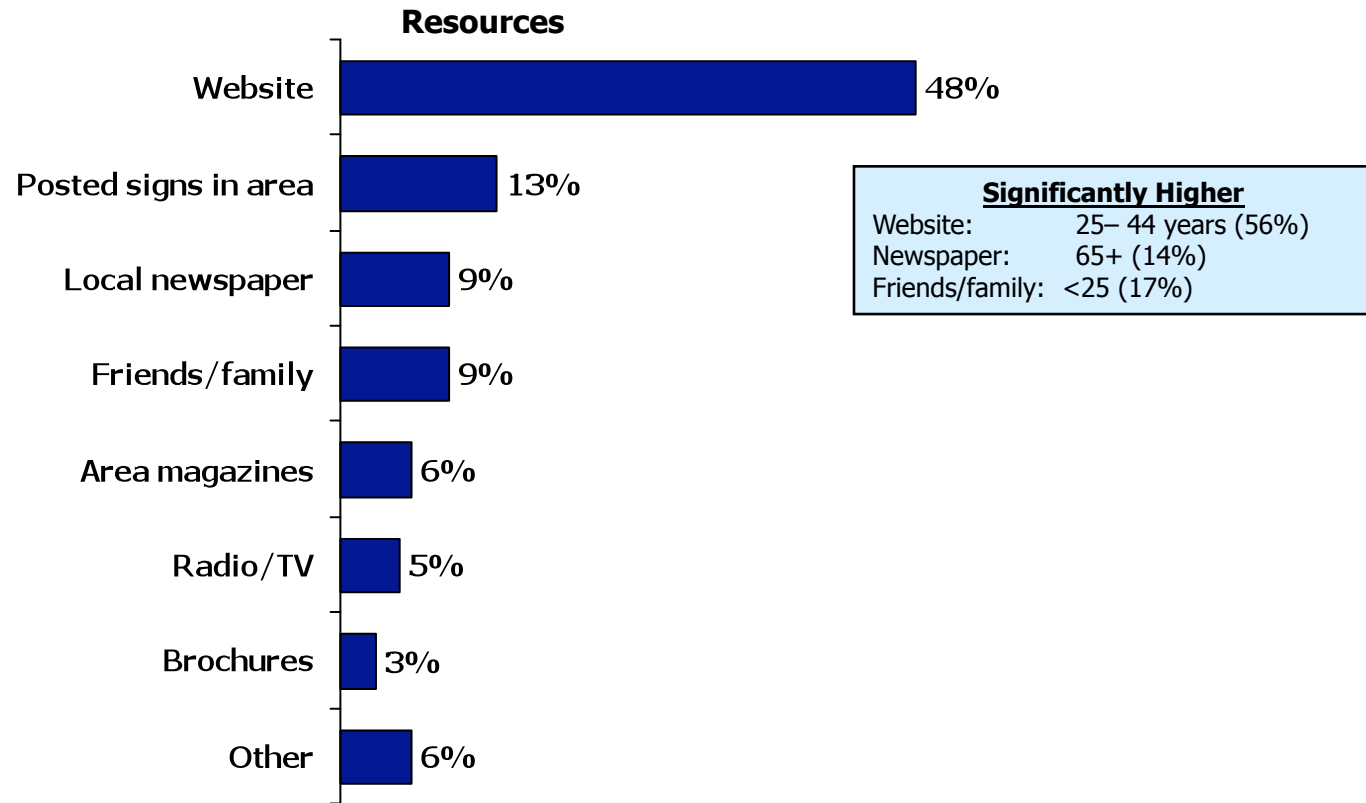
Base = 416

Q11. On a scale of 1 to 6 (1=not at all interested and 6=very interested), which number would best describe how interested you are in the following improvements or changes in the Riverfront area?

# Preferred Resources for Riverfront Information

**Four times as many visitors prefer to seek information on a website than any other source.**

- Signs posted in the Riverfront area (13%), local newspaper (9%) and friends/family (9%) represent distant secondary resources.
- Across communication channels, several significant differences are evident by age group:



Base = 416

Q10. What is your preferred resource when seeking more information about the programs or activities relating to the Riverfront area?

Note: Only suggestions ≤5% shown above.

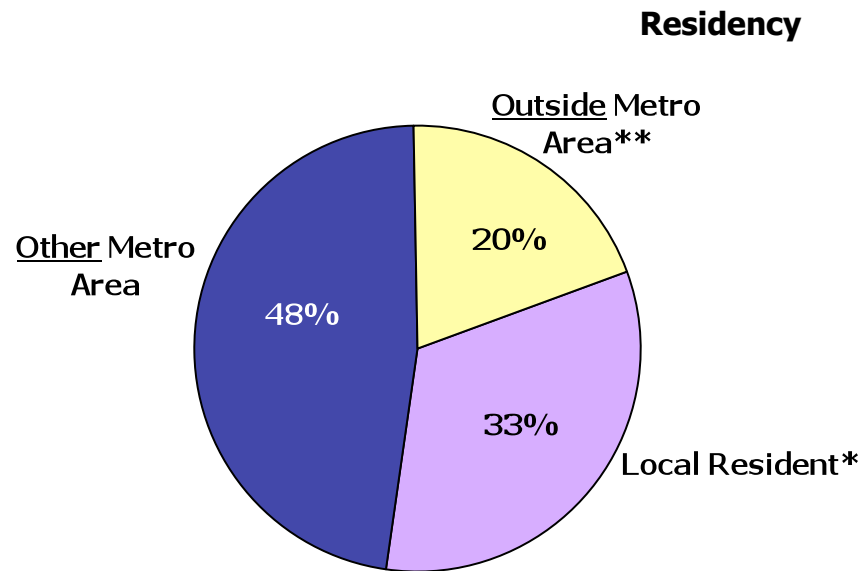


# Visitor Profile

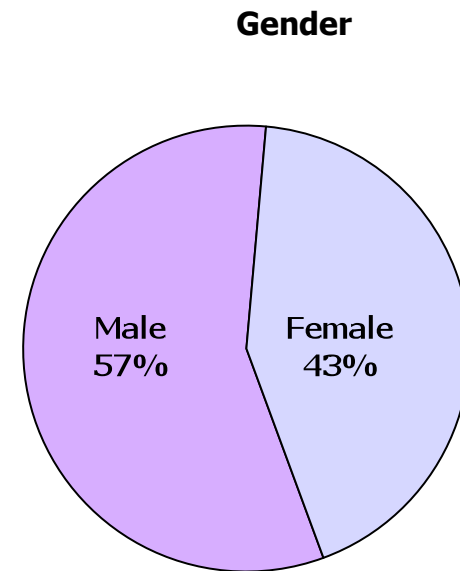
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# Residency and Gender

**Other Metro Area residents comprise nearly half of the study sample (48%), followed by Local Residents (33%) and Outside Metro Areas (20%) visitors.**



**Interviewed Riverfront area visitors skew slightly more male (57%) than female (43%).**



Base=416  
Q18. Residency

Base=415  
Q15. Gender

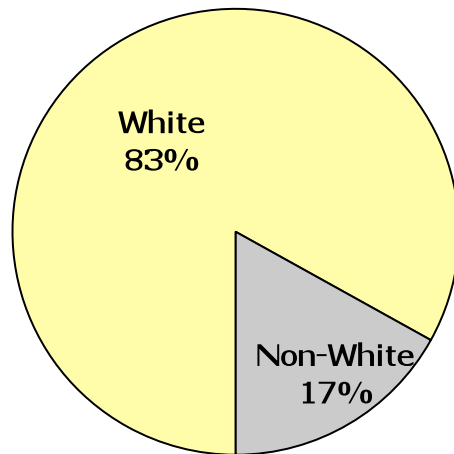
\*Local Residents defined by zips: 55401, 55402, 55413, 55414, 55415, 55418, 55454, 55455.

\*\*Includes 16 visitors without US zip codes, assumed to live out of the country.

# Ethnicity

**Ethnic representation generally aligns with the 2000 Census data for the Minneapolis St. Paul Metropolitan area.**

**Ethnicity**



<b>Black/African American</b>	<b>8%</b>
<b>American Indian</b>	<b>2%</b>
<b>Asian Pacific Islander</b>	<b>1%</b>
<b>Spanish/Hispanic/Latino</b>	<b>1%</b>
<b>Alaska Native</b>	<b>1%</b>
<b>Other</b>	<b>4%</b>

<b>MINNEAPOLIS-ST. PAUL SUMMARY POPULATION DEMOGRAPHICS AND DIVERSITY Population Composition by Race/Ethnicity</b>			
	<b>1980</b>	<b>1990</b>	<b>2000</b>
Non-Hispanic White	94.5%	91.5%	84.7%
Hispanic	1.0%	1.5%	3.3%
Non-Hispanic Black	2.3%	3.5%	6.1%
Asian/Pacific Islander	0.9%	2.6%	4.8%

**Source:** "Racial and Ethnic Residential Segregation in the United States: 1980-2000," U.S. Census Bureau, Series CENSR-3, and 2000 Census, Summary File 1.

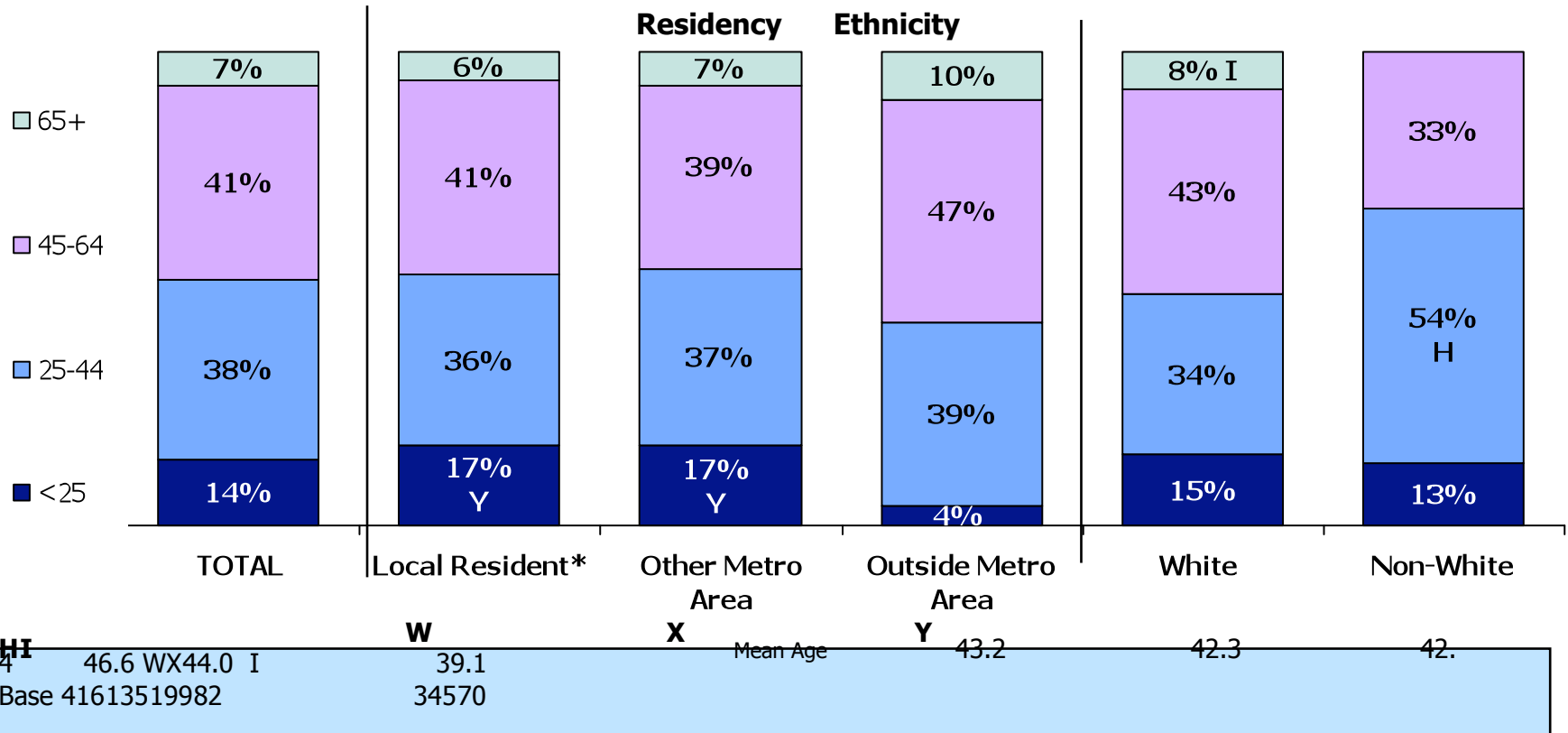
Base=416

Q15. Which of the following describes your ethnicity?

# Age—by Residency and Ethnicity

**The average age of Riverfront visitors is 43 years old.**

- Those visiting from outside the Metro Area are significantly older on average (46.6 years) than Local Residents (42.3) and Other Metro Area residents (42.4).
- The average age of whites (44.0) is significantly higher than non-whites (39.1).
- No age differences are evident by gender, visitor frequency or activities planned.

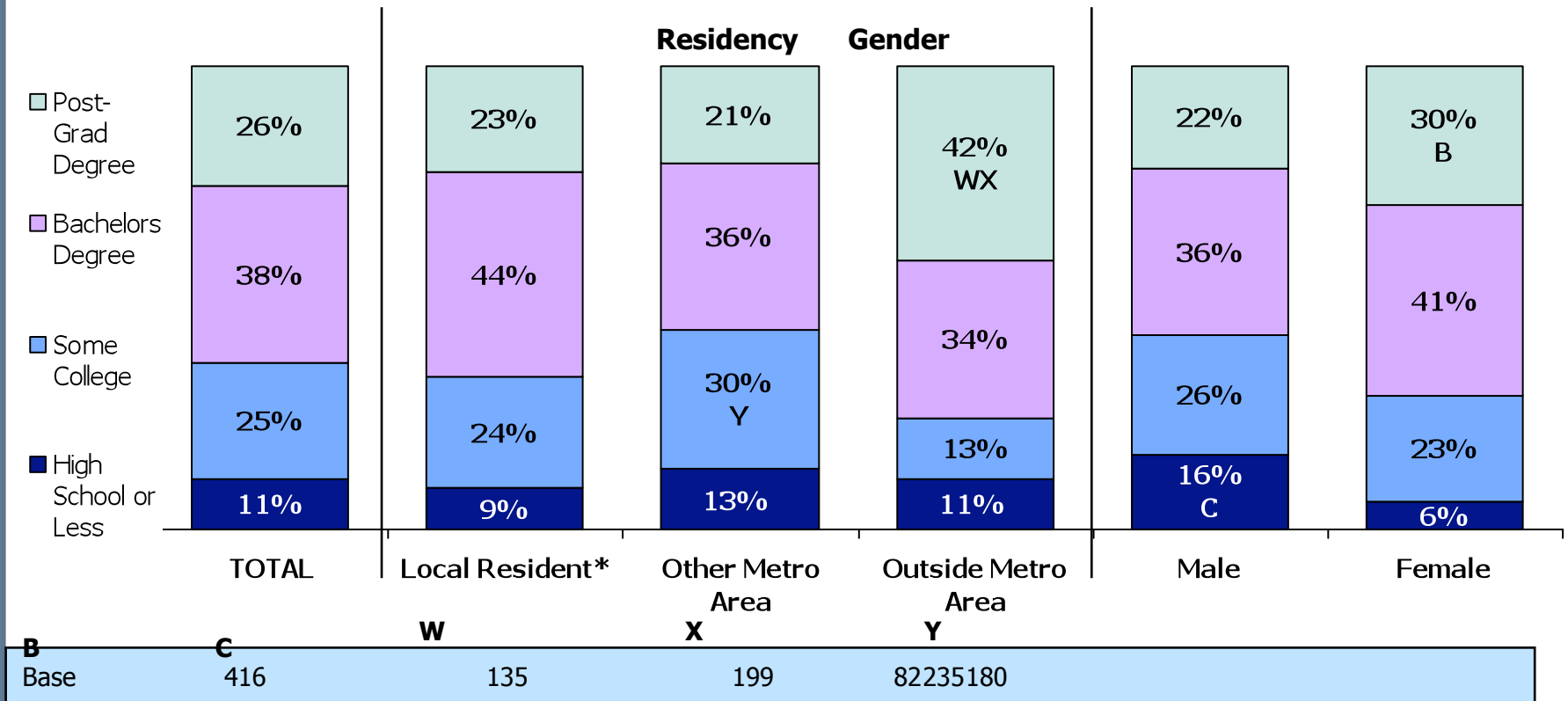


Q13. Please stop me when I read the category that includes your age.  
 Letters indicate significantly higher than another category at a 95% confidence level.  
 \*Local Residents defined by zips: 55401, 55402, 55413, 55414, 55415, 55418, 55454, 55455.

# Education—by Residency and Gender

**Riverfront visitors are highly-educated, with 1 in 4 (26%) holding a post-graduate degree.**

- By residency, significantly more visitors from outside the Metro Area (42%) have attained post-grad status.
- Female visitors surpass their male counterparts in educational attainment.



Q14. And the highest level of education you have completed?

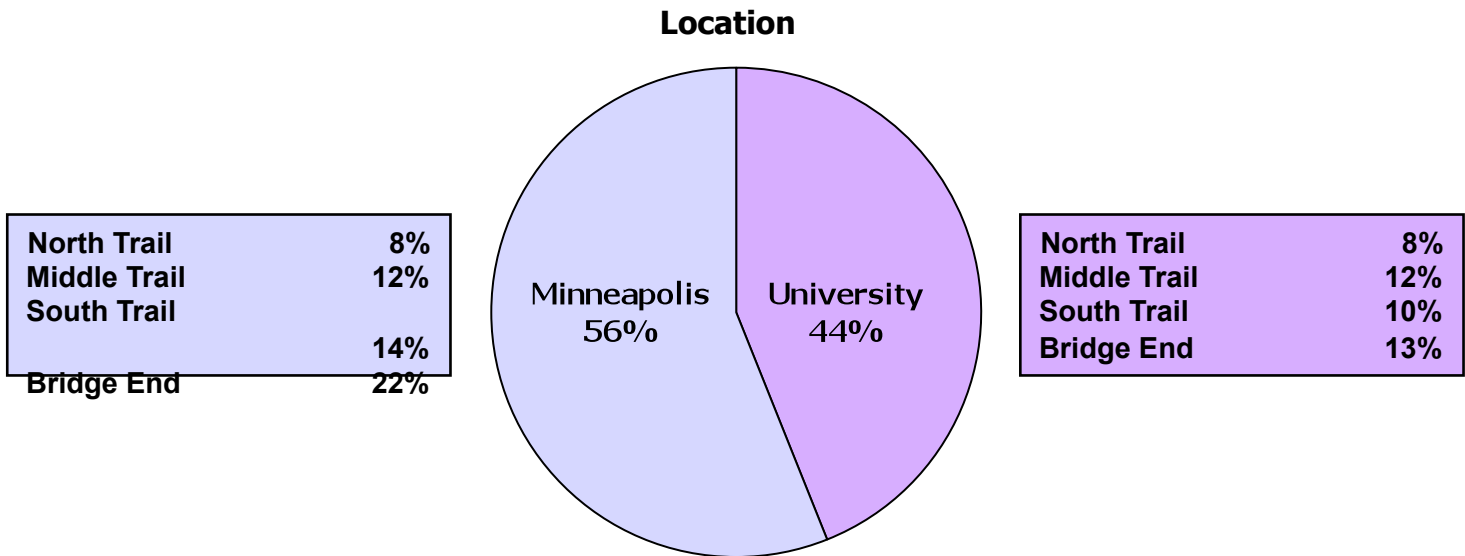
Letters indicate significantly higher than another category at a 95% confidence level.

\*Local Residents defined by zips: 55401, 55402, 55413, 55414, 55415, 55418, 55454, 55455.



# Interview Location

**Location tracking assures similar representation by specified locations.**



Base=416  
Q21. Location of interview



# Appendix

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# Research Definitions

## Base

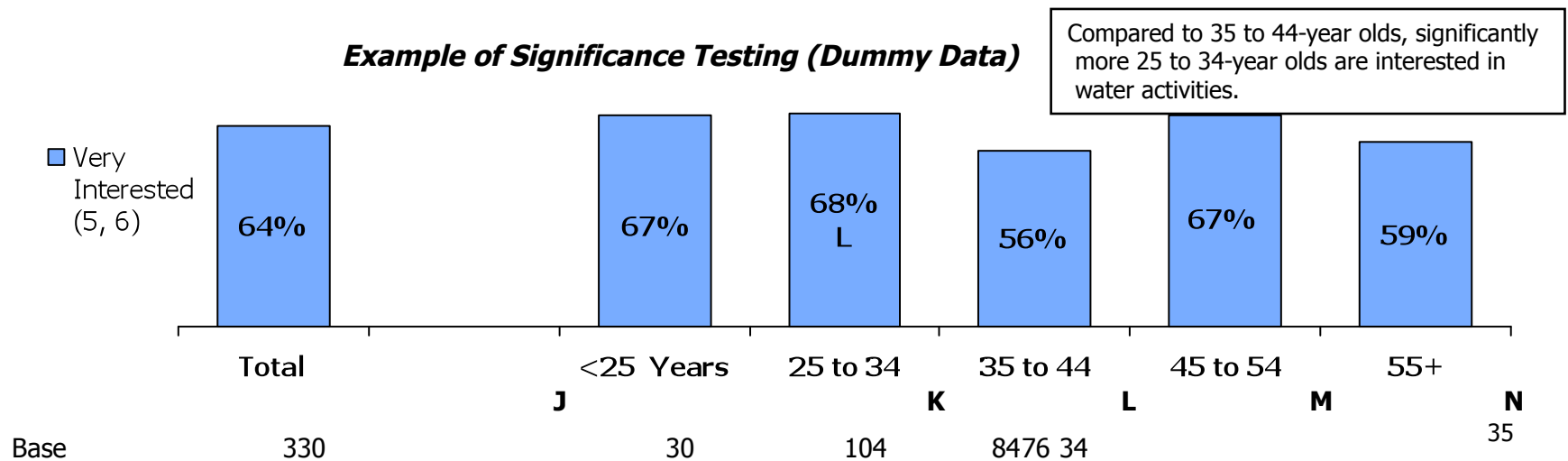
- Number of Riverfront visitors answering a specific question.

## “Top Two Box” Ratings

- Survey ratings are based on a 6-point scale, where 6 means “*very interested/satisfied*” and 1 means “not at all satisfied/important.”
  - 6 is considered the “top box” rating. 5 and 6 are the “two top box rating.”

## Significance Testing

- Significance testing is performed at the 95% confidence level across all categories.
- To point out statistically significant differences across categories, letters (JKLMN) corresponding to the significantly *larger* number are placed next to that number.



# Visitor Survey Screener

APPROACH MALES AND FEMALES WHO REPRESENT A VARIETY OF AGES AND TYPES AND WHO APPEAR TO BE 16 YEARS OR OLDER.

"X" ONE NUMBER IN A TALLY BOX FOR EACH PERSON CONTACTED AND DISCONTINUED. START A NEW Q'NAIRE WHEN THE LAST NUMBER IN ANY TALLY AREA HAS BEEN USED. ALL CONTACTS MUST BE ACCOUNTED FOR ON THIS TALLY SHEET. DO NOT APPROACH ANY ADULT WHO IS WITH AN ORGANIZED "GROUP" OR TOUR.

Hello. I am \_\_\_\_\_ with Cincinnatus, a consulting firm. I'd like to ask you a few questions about the Minneapolis riverfront area. It will take 7 to 8 minutes and your responses, of course, will remain strictly confidential. Upon completion of the interview, your name will be entered into a drawing for \$ 100 cash as thanks for your help.

SHOW THE MAP AND CLARIFY THE ST. ANTHONY FALLS DISTRICT BOUNDARIES OF PLYMOUTH AVENUE/8th NE, WASHINGTON AVENUE, 35W BRIDGE AND UNIVERSITY AVENUE. HAVE AUTHORIZATION LETTER HANDY IF NEEDED.

CIRCLE ONE NUMBER TO REFLECT THE REASON FOR EACH DISCONTINUE.

<b>Disposition</b>	<b>Wave 1: 4/30/09 to 5/6/09</b>	<b>Wave 2: 6/11/09 to 6/17/09</b>	<b>Total</b>
Refused to Begin	285	392	677
Not Able to Communicate/ Speaks Another Language	33	8	41
Refused During or After Answering One Question	3	0	3
Younger than 16 Years	4	77	81
Security DQ	9	1	10
Total Discontinues	334	478	812
<b>Completes</b>	<b>212</b>	<b>204</b>	<b>416</b>
Total Intercepts	546	682	1,228