

# CHICAGO AREA VISITOR SURVEY



Regional  
Transportation  
Authority

Prepared by:



Executive Summary  
April 2015

The Regional Transportation Authority (RTA) commissioned RSG Inc. to survey and prepare the following report on transportation choices by visitors to the Chicago region. The RTA oversees planning and funding for public transportation in the Chicago area. The RTA convened the Chicago Visitor Travel Survey Technical Committee, which was comprised of representatives from the Illinois Department of Transportation's Division of Public and Intermodal Transportation, the Chicago Transit Authority, Metra, Pace, the Chicago Metropolitan Agency for Planning (CMAP), the Chicago Department of Transportation, and the Chicago Convention and Tourism Bureau.

The RTA, the Federal Transit Administration, and the Illinois Department of Transportation's Division of Public and Intermodal Transportation funded this study.

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# EXECUTIVE SUMMARY

The Regional Transportation Authority (RTA) hired RSG to survey visitors to the Chicago area in August and September of 2014. The goal of the survey and study was to better understand who visits the Chicago area, learn what these visitors typically do, and identify why these visitors chose transit or another travel mode to get around the Chicago area.

To guide the study the Chicago Visitor Travel Survey Technical Committee was established by the RTA and composed of representatives from the Illinois Department of Transportation's Division of Public and Intermodal Transportation, the Chicago Transit Authority, Metra, Pace, the Chicago Metropolitan Agency for Planning (CMAP), the Chicago Department of Transportation, and the Chicago Convention and Tourism Bureau. These agencies will use this report to devise better strategies to attract more visitors to transit.

3,689 visitors responded to the survey via e-mail invitations, links on visitor and agency websites, and intercept surveys at many Chicago area tourist locations. To better understand the travel decisions different visitors made and their attitudes toward transportation and transit in the Chicago area, home geography and trip purpose were used to divide the visitor market into several segments.

SEGMENT CATEGORY	SEGMENT	DEFINITION	TOTAL RESPONSES
Visitor Type	Regional Visitor	Visitor who lives within the six-county region and made a trip to a museum, event, tourism location, or convention	2,074
	Non-Regional Visitor	Visitor who lives outside the six-county region	1,615
Trip Purpose	Leisure	Trip primarily for leisure purpose	2,866*
	Business	Trip primarily for business purpose	424*
Country of Origin	Domestic Traveler	U.S./Canadian Resident	3,305**
	International Traveler	Non-U.S. Resident	384

\*A third category option was provided for purpose: 'Both Business and Leisure.' This category was excluded from the Purpose tabulation.

\*\*Note: Canadian visitors were grouped as Domestic visitors for this study's purposes

## Primary Visitor Segments

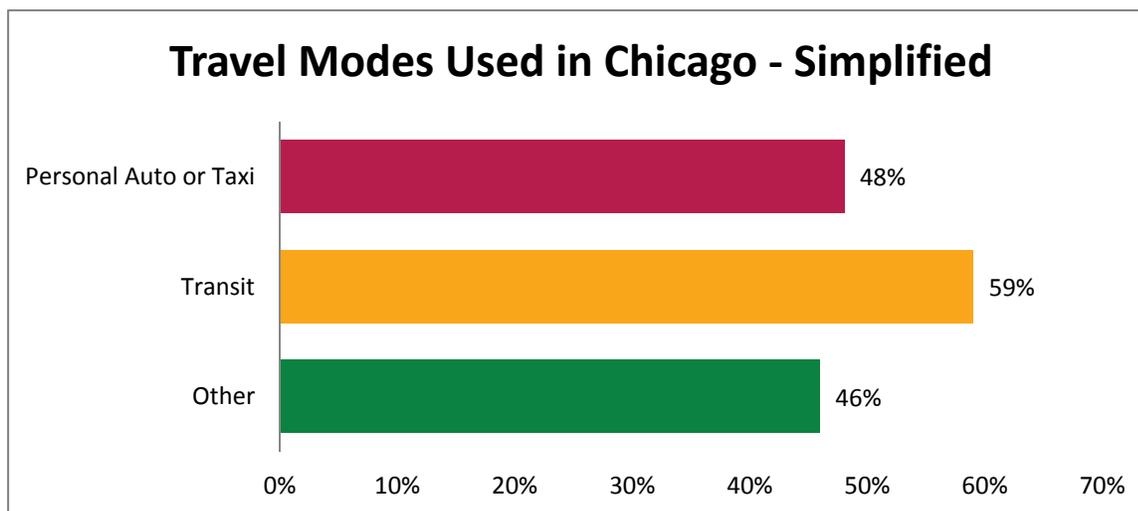
The survey team first asked visitors whether they lived inside or outside of the RTA six-county Chicago area when they made their visit. If they lived within the Chicago area, they were asked if they made a non-routine, non-work trip (e.g. to a museum, event, or tourist location) and further surveyed only those who did. These people were classified as regional visitors. If they lived outside of the Chicago area, they were asked whether they resided in the U.S. or Canada or outside those countries and classified them respectively as domestic or international visitors.

For all visitors, the survey team asked them whether they were traveling to the Chicago area on business, leisure, or a mix of business and leisure.

### Regional Visitors

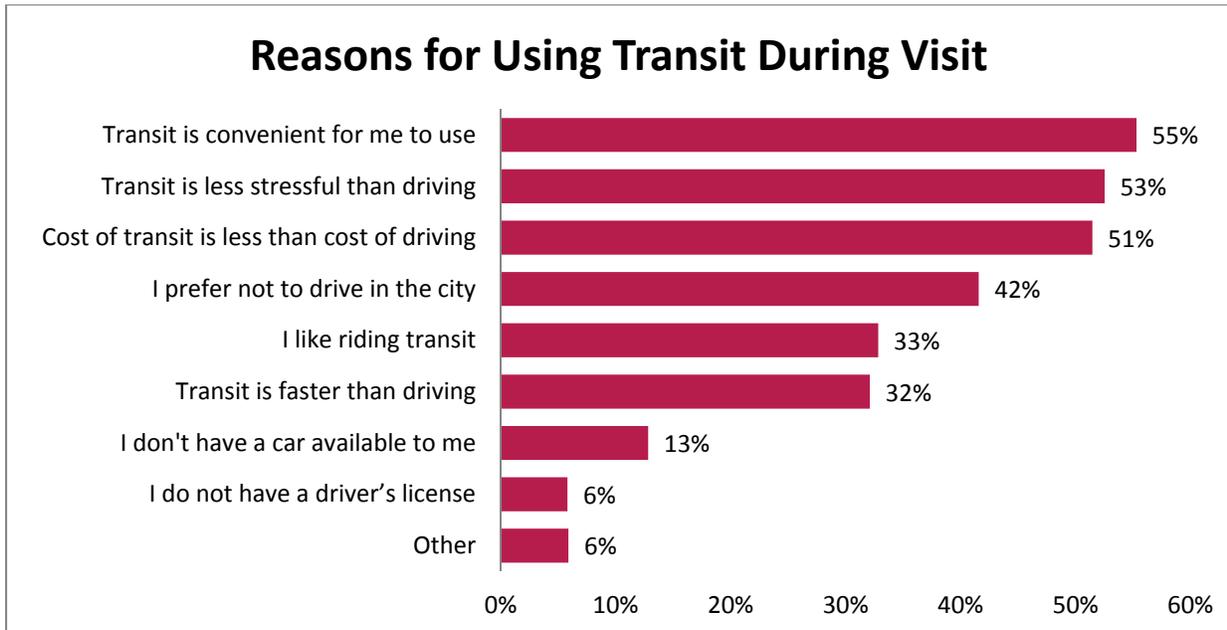
Regional visitors lived within the RTA six-county Chicago area and traveled to a museum, event, tourist location, or convention also in the Chicago area. The majority (66.4%) of regional visitor responses came from a Metra e-mail list, potentially skewing some of the results. However RSG included these visitors in the results, since it helps shed light on different types of regional visitor trips.

Over half of regional visitors surveyed used transit for at least some part of their trips during their visit to the Chicago area. These visitors cited convenience, lower stress, and the lower cost of transit as the most important reasons for using transit during their visit. Not having a car and not having a license were the least-cited reasons.

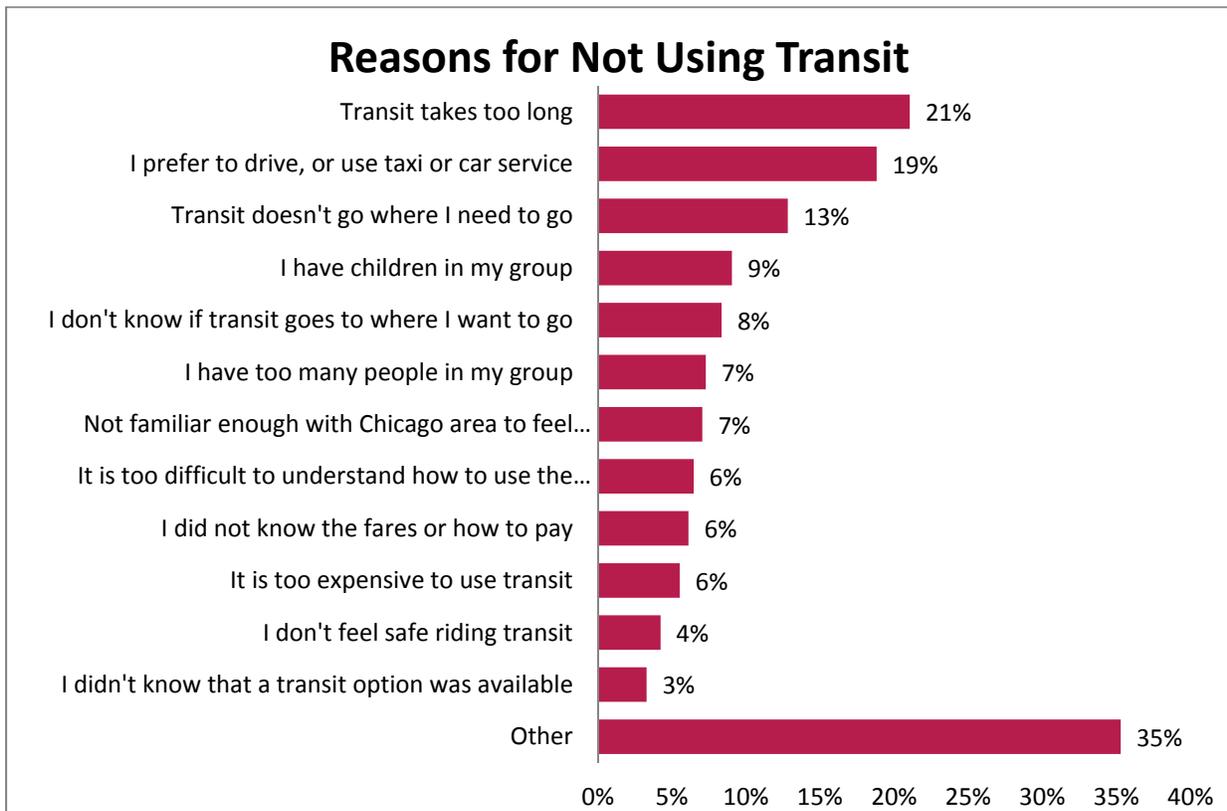


#### Travel Modes Used - Simplified (Regional Visitors)

As for their reasons for not using transit, regional visitors most commonly answered "other", noting they could walk everywhere they needed to go, had "no need" to use transit, found their "car was easier," or found "it's faster to drive," among other reasons. Regional visitors who indicated barriers to transit mainly stated that transit appeared to take too long or they preferred to drive or take a taxi/car service.



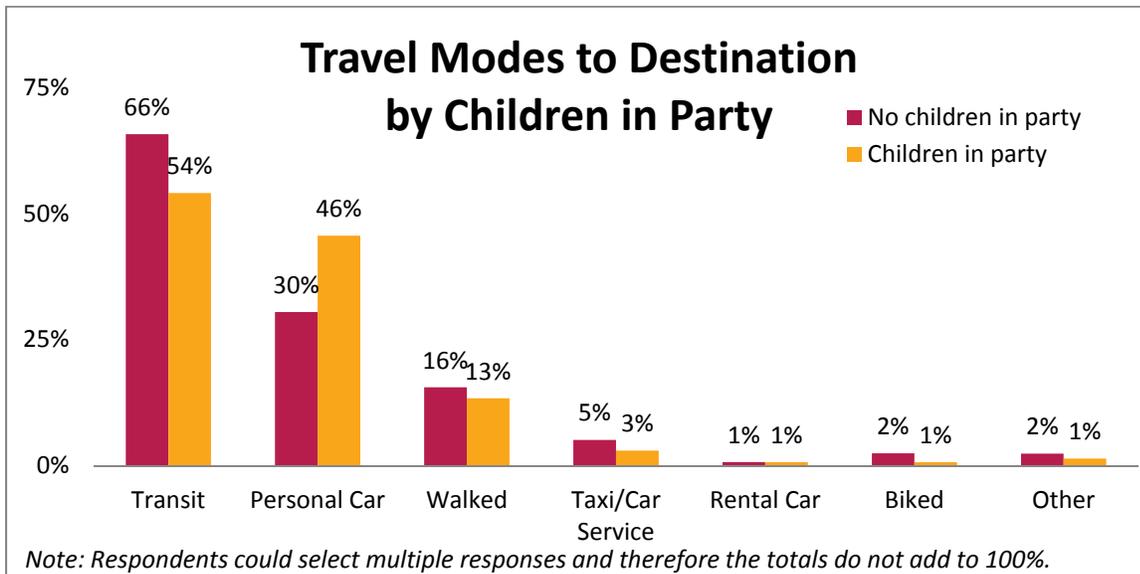
Reasons for Using Transit During Visit (Regional Visitors)



Reasons for Not Using Transit (Regional Visitors)

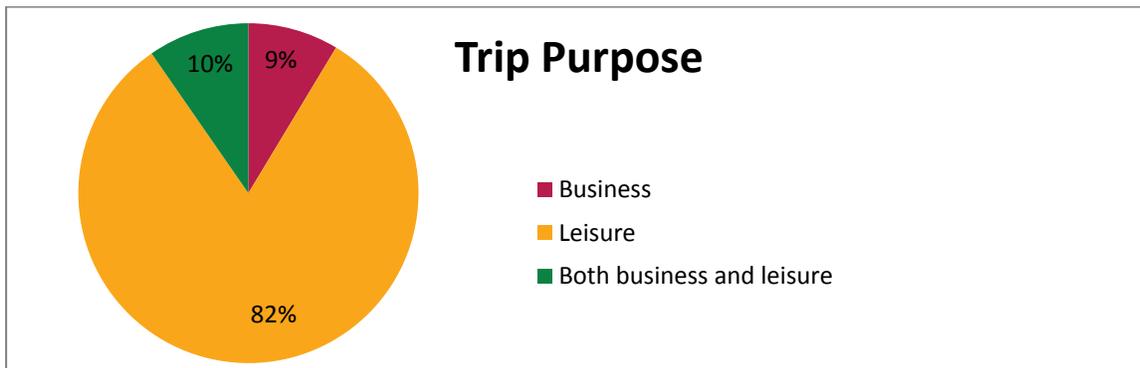
Among regional visitors, the younger age groups (under 35 years old) and older age groups (65 years old or over) tended to take transit more than the middle age groups. Those in the middle age groups, particularly those between 35 and 44 years old, were far more likely to drive. Regional visitors were more likely than other segments to travel with children; however, regional parties including children were less likely to utilize transit.

Regional visitors traveling with children were less likely to take transit to get to their destination (54%) than those traveling without children (66%). However, over half of those traveling with children still took transit.



**Travel Modes to Destination by Children in Party (Regional Visitors)**

While most visitor trips made by regional residents are for leisure, approximately 20% of regional visitors traveled as a part of trip connected to a business purpose. These visitors went to a conference or meeting and then stayed to go to museums, other tourist attractions, and restaurants.



**Trip Purpose (Regional Visitors)**

Regional visitors were generally positive about transit in the Chicago area and realized driving in the Chicago area could be costly and stressful. However, those that drove believed transit took too long or simply preferred driving.

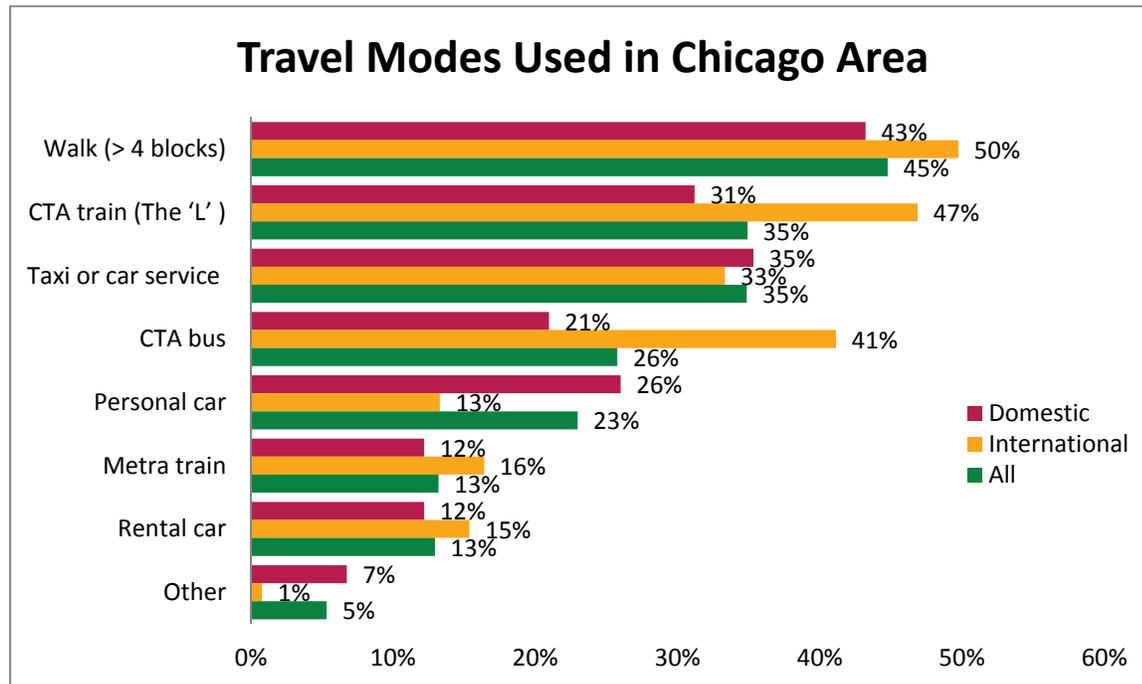
Regional visitors used several resources to plan their trips, although most found their information online. Younger visitors (those under 35 years old) expected to access this information not just on a computer, but also on their smartphones/mobile devices. Older visitors (those 55 years old and older) used the internet but also tended to gravitate toward printed materials (e.g., printed schedules/maps, newspapers).

### Non-Regional Visitors

Non-regional visitors traveled into the six-county Chicago area from outside it. They made up a smaller portion of the visitor market but tended to stay longer, visited more tourist locations, and engaged in more activities than regional visitors.

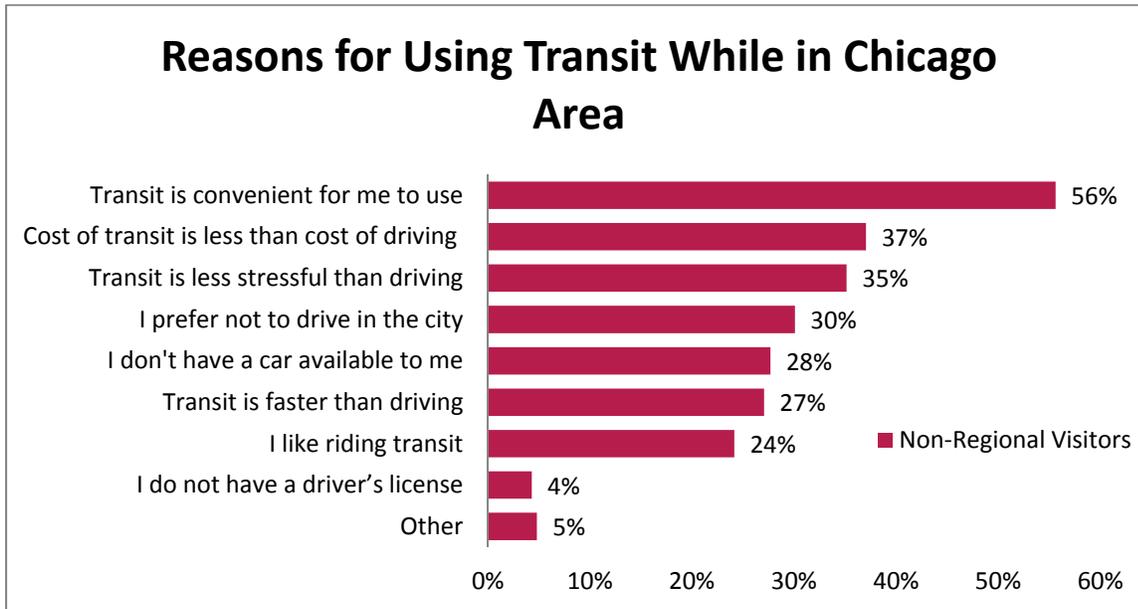
RSG divided non-regional visitors into domestic (i.e. the U.S. and Canada) and international (i.e. outside of the U.S. and Canada) markets. Most non-regional visitors in this survey flew into the Chicago area and stayed in downtown Chicago. These visitors represent an exceptional potential transit market because they came to the Chicago area without a vehicle and are stayed in an area with considerable transit.

Non-regional visitors traveled to downtown Chicago and primarily walked to the area’s attractions, restaurants, and stores. For longer trips, they usually took a taxi or car service. To a slightly lesser extent, they took a CTA train. Only one-quarter of these visitors used a personal car for any part of their travel. This suggests visitors are able to use a variety of transportation modes to travel around the city. *(Note: the chart below excludes travel mode categories totaling <5%)*



Travel Modes Used in Chicago Area (Non-Regional Visitors)

Non-regional visitors who took transit in the Chicago area often stated it was convenient, less expensive and stressful than driving, and provided a convenient way to get to and from the airport. International visitors also stated they used transit because they did not have a car available to them. When visitors were asked more broadly about their attitudes towards transit in the Chicago area, most of them stated how transit was convenient, easy to navigate, and available in areas people wanted to go.



Reasons for Using Transit while in Chicago Area

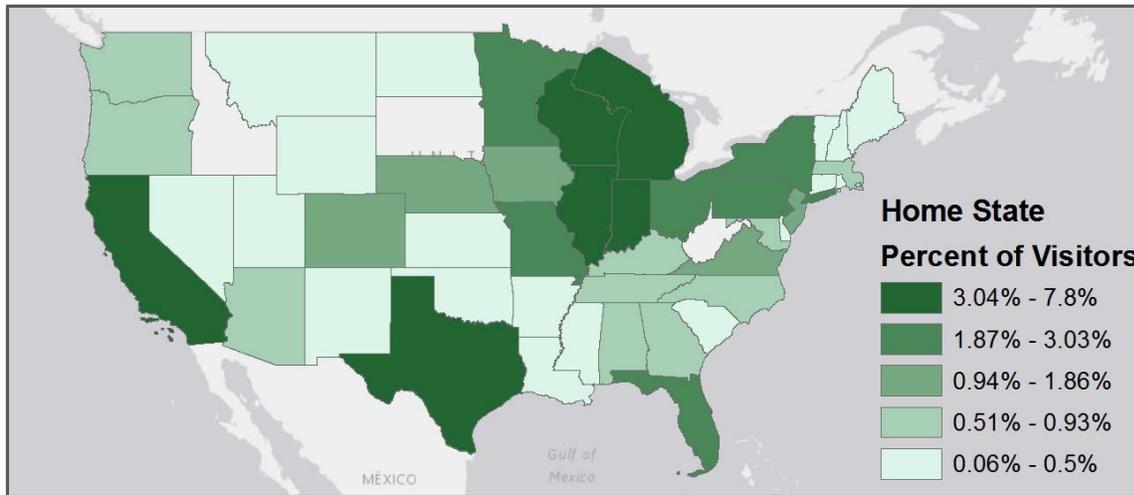


Reasons for Not Using Transit (Non-Regional Visitors)

Non-regional visitors most often used a computer or a mobile device to plan their travel and obtain travel information. Ensuring clear and easy access to online information is a good way to continue

capturing non-regional visitors. Compared to regional visitor, non-regional visitors, especially international ones, are more likely to get information from visitor centers and visitor brochures.

Domestic visitors came from all over the U.S. and Canada, particularly from the surrounding Midwestern states. Those who lived closer to the Chicago area primarily drove. They primarily came for leisure, but were more likely than international visitors to travel to the Chicago area for business. Getting domestic visitors out of their cars and onto transit could be challenging without raising parking fees, which could deter them from driving in the Chicago area.



**Home State (Non-Regional Visitors)**

International visitors tended to be younger (under 35 years old) than domestic visitors. They were more likely to stay in a hostel, more likely to take transit, and more likely to combine business and leisure trips. They also were more likely than domestic visitors to use planning resources including visitors' centers and saw more attractions. These tendencies make them a potential market for agencies to target (e.g. Come for business and stay for fun!).

## Recommendations

The results from the survey help identify the different characteristics, attitudes, and behaviors of different segments of the Chicago area's visitor travel market. Understanding these segments can help shed light on strategies to pursue to best capture these segments.

The Chicago area has done a good job developing a transit system visitors want to ride and feel comfortable riding. However, the challenge now is to continue to capture a greater portion of the transportation market. Part of that challenge will be counteracting some of the reasons visitors do not use transit. The top reasons for not riding transit include a preference for driving, or using a taxi or car service; not being familiar with the Chicago area to feel comfortable using transit; and not knowing if transit goes where they need to go.

### *Attracting Repeat Visitors*

Regional visitors tend to visit for day trips and make frequent visits. In the survey, 28% of regional visitors reported making visitor trips 12 or more times per year. Focusing on the regional visitor market therefore holds promise for capturing repeat transit customers.

- Since most regional visitors traveled for leisure, emphasize the leisure and relaxing aspect of taking transit by marketing transit as part of the city experience.
- A sizable portion of regional respondents were familiar with utilizing transit during their weekly activities with 34% using transit 5 or more times a week. Promoting the transit accessibility of visitor sites may potentially yield additional non-commuting trips.
- The analysis showed driving as the main competitor to transit use. Reminding visitors of the costs of driving (e.g., fuel cost, parking cost, and lost time and energy searching for a parking spot) while emphasizing the advantages of transit could encourage visitors to choose transit over driving.
- Regional visitors were sufficiently familiar with the region and did not require additional planning resources. Many were already familiar with Metra and CTA websites. A barrier noted by 8% of respondents was "I do not know if transit goes where I want to go." Promoting the trip planning capabilities of the less well known RTA Trip Planner may help visitors to better understand if and what transit goes to their destination. The forth-coming Ventra mobile application could also be a good forum for sharing trip information with customers.

### *Visitors with Children*

The survey data showed a correlation between having children in the travel party and a lower rate of transit use. Respondents with young children in their party used a car more often.

- Emphasize that children under seven years old ride free with a fare-paying adult to help encourage visitors with children to use transit.
- Marketing Metra's Family Car accommodations may also help to encourage parties with children to utilize transit.
- Visitors traveling with children had a higher propensity to visit a tourist attraction or museum during their visit as compared to parties without children. Strategies for targeting families with children could include co-marketing with key visitor destinations. Furthermore, several

organizations offer bundled tourist passes – it could be advantageous to bundle transit passes with some of these tourist passes to further encourage transit use on tourist-type visitor trips.

- Consider promoting services that enhance the children and family ride experience. This can encourage families to use transit (as it would encourage a “family friendly” perception) as well as encourage a habit of transit use in children. Also consider educational opportunities that could make children more knowledgeable and comfortable with transit.

### ***Business Visitors***

Regional business travelers (defined for the survey as those attending an event or convention) tended to make quick trips, went to few sites during their visit (i.e., an average of 1.7 sites compared to 2.4 sites for leisure travelers), and engaged less in visitor activities (such as going out to restaurants, etc.). In contrast, those who made a combined business/leisure trip went to more sites than purely business or leisure visitors and had their activities more closely mirror that of leisure visitors.

- Agencies should try to capture this potential transit market since regional business visitors frequently make these trips. In the survey, 41% of business visitors and 37% of business/leisure visitors made 12 or more trips within the Chicago area in the past 12 months, compared with 26% of leisure visitors.
- As with the overall visitor population, the most-often indicated barrier to transit use is transit takes too long. While the actual time frame may bar some business visitors from using transit, the perceived trip duration can change when business visitors see travel time as “productive time” and not “wasted time.”
- A potential source of increased visitor trips could be marketing to business travelers to bring their spouse or families with when they go into the city for meetings/conferences.

### ***Older Visitors***

Respondents 65 and older are more likely to take transit because they don’t like driving in the city (53%), and were more likely to feel transit is less costly than driving (66%). These predilections should be emphasized when marketing to older visitor. They were also more likely than younger visitors to access information at a transit station/stop.

### ***Metra and South Shore Line Users***

The majority of regional visitors that also use Metra and South Shore trains did not transfer to a different service once reaching their end terminal because they stated that “Metra or South Shore line already got them to where the needed to go” or they “preferred to walk or bike once they go to downtown.” The third most common reason provided for not using the CTA in particular was that “they don’t know the CTA system well enough.” Coordination provided by the forth-coming Ventra mobile app holds potential to increase the seamlessness between services. Additionally, cross marketing of services by the different transit agencies could further inform riders of the potential to reach their destination by transit.

### ***Non-Regional Visitors***

Non-regional visitors engage in many activities and go to lots of tourist destinations over the course of their visit. This is especially true of leisure visitors, who engage in more activities and visit more of the tourist locations than business visitors. These are potential repeat transit customers during their visit, and since most of them stayed in the City of Chicago, transit is a strong option for them.

The two main reasons for not using transit among non-regional visitors are “I prefer to drive, or use taxi or car service” and “I am not familiar enough with the Chicago area to feel comfortable using transit”. Emphasizing the downsides and comparative costs of driving could help capture visitors who would otherwise drive.

- To further expand on enhancing visitors’ knowledge of the system, transit information should highlight popular visitor destinations near transit. After using transit once, visitors may become familiar with the system and be more willing to use it in the future.
- Increasing signage to transit near key visitor destinations may help expand visitors’ awareness of their opportunities and encourage them to consider taking transit.
- The proportion of non-regional visitors who went to Millennium Park and Navy Pier was quite large, particularly for international visitors (46% went to Millennium Park and 43% to Navy Pier). This suggests agencies should focus their efforts on targeting non-regional visitors at these locations, as well as in the Loop and near the North Michigan Avenue Bridge.
- Having transit information available at visitor centers and information kiosks is another entry-point for introducing these visitors to transit and for overcoming their unfamiliarity with the city.

### ***International Visitors***

International visitors are a small portion of the visitor population, but agencies should not ignore them. They tend to stay longer, are more likely to use transit at home, show a high prevalence of transit use in the Chicago area, and visit more tourist destinations than domestic visitors. Agencies should thus convince these visitors to use transit early in their visit to the Chicago area.

- Because most international visitors fly into the Chicago area, their points of entry are concentrated. Marketing to them through the airports and airlines may offer cost-effective opportunities.
- In accordance with general visitor trends, since international visitors tend to travel in smaller groups and to not have children in their parties, they are more likely to try transit. Targeting these international visitors may yield additional transit trips.