

2015 U.S. TOURISM QUALITY PERFORMANCE REPORT

— RESONANCE REPORT





RESONANCE CONSULTANCY CREATES DEVELOPMENT STRATEGIES, PLANS, AND BRANDS THAT SHAPE THE FUTURE OF PLACES AROUND THE WORLD.

Our team has advised developers, destinations, communities, cities and governments in more than 70 countries. We provide leading public and private sector organizations with research, visioning, strategic planning, development strategy, and brand strategy to help realize the full potential of developments, destinations and communities.

The 2015 U.S. Tourism Quality Performance Report ranks large, medium and small destinations from a unique and increasingly important supply side perspective, an overview of which is provided here.

Individual city reports with details per category and customized competitive benchmarking with 10 key competing destinations are available for purchase at:

www.resonancereport.com



INTRODUCTION

Resonance Consultancy has undertaken Destination Assessments and Development Strategies for a wide range of destinations, cities, states and countries. Through our work, we've learned that traditional performance indicators – economic output, spending and visitors – don't tell destinations and their tourism and economic development agencies the whole story.

In our experience, Destination Marketing Organizations focus primarily on growing visitor numbers, but there is relatively scant attention paid to the product development and programming required to maintain and improve the quality of the visitor experience.

As a growing number of visitors base their judgment about destinations on overall experiential quality rather than just the number of must-see attractions, growth in demand must be matched by expansion and improvement in supply to ensure the viability and sustainability of a destination's tourism industry over the long term.

From a demand side perspective, it's generally straightforward to assess a destination's performance using standardized measures of visitor traffic, spending or hotel occupancy rates. But when it comes to evaluating the supply side of a destination, no standardized measures exist to benchmark the experiential quality of one destination to the next. Traditional visitor intercept surveys provide destinations with insight into what visitors find appealing or lacking, but there is no efficient or standardized way to compare and benchmark these results with those of other destinations.

To solve this problem, Resonance Consultancy has analyzed social media channels from increasingly influential websites such as Trip Advisor and Yelp. We've identified how many quality¹ experiences cities offer from one product and experience category to the next as rated by locals and visitors themselves. With more than 270 million combined reviews, these sites are both powerful marketing channels for destinations, and can also provide new insight and intelligence into the experiential quality and differentiating characteristics of destinations themselves.

We think you'll find that this approach to examining the quality of destinations from the visitors' point of view is both an effective and efficient method to measure supply side performance from one destination to the next and a valuable tool to better understand the competitive advantages – and weaknesses – of your destination.

¹ Quality Experiences are those with an overall rating of "very good" or "excellent"



METHODOLOGY

The 2015 U.S. Tourism Quality Performance Report measures tourism's supply-side performance and competitiveness in 121 cities across the United States based on both absolute and indexed scales: the absolute scale measures the total number of quality¹ experiences; the indexed scale evaluates performance in terms of how many quality¹ experiences are delivered per visitor (i.e. the number of quality experiences per 100,000 visitors).

To formulate visitor estimates for each destination and create the indexed scoring, we utilized a combination of data from *TNS Global's 2014 visitor survey* for domestic visitor counts and the U.S. Department of Commerce National Travel and Tourism Office Air Travelers' Survey for international counts to create estimates for total visitors to each destination. Resonance selected destinations for this report based on the availability of adequate data from these two sources.

The rankings that follow are based on an analysis of the number of products or experiences rated as 'very good' or 'excellent' in 17 different areas. We have grouped them into six core categories:

1. Culture

The arts and culture in a city

- Museums (Trip Advisor)
- Theaters & Concerts (Trip Advisor)
- Arts & Entertainment (Yelp)

2. Entertainment

Fun attractions and experiences

- Shopping (Yelp)
- Nightlife (Yelp)
- Amusement Parks (Trip Advisor)
- Zoos & Aquariums (Trip Advisor)
- Casinos & Gambling (Trip Advisor)
- Fun & Games (Trip Advisor)

3. Sightseeing

The natural and built environment of a city

- Sights & Landmarks (Trip Advisor)
- Nature & Parks (Trip Advisor)
- Sightseeing Tours (Trip Advisor)

4. Sports & Adventure

A destination's outdoor activities and adventures

- Outdoor Activities (Trip Advisor)
- Boat Tours & Water Sports (Trip Advisor)

5. Culinary

The food experiences in a destination

- Food & Drink (Trip Advisor)
- Restaurants (Yelp)

6. Lodging

Accommodations in a city

- Hotels (Trip Advisor)

¹ Quality Experiences are those with an overall rating of "very good" or "excellent"



METHODOLOGY (CONT'D)

Finally, in order to benchmark similar-sized cities against one another, destinations have been segmented into three groups based on their estimated visitor traffic:

Large destinations

That attract more than 10 million visitors per year

Medium destinations

That total between 4-10 million visitors

Small destinations

That attract fewer than 4 million visitors annually



2015 NATIONAL TOURISM QUALITY PERFORMANCE RANKINGS

Destination	State	Total Quality Exp.	Absolute Rank	Exp/100,000 Visitors	Index Rank
Portland	OR	6,702	7	96.9	1
Kauai Island	HI	936	54	59.3	2
Los Angeles	CA	19,202	2	54.8	3
New York City	NY	20,362	1	51.8	4
Maui Island	HI	1,939	26	49.8	5
Anaheim / Orange County	CA	8,971	3	49.0	6
Hawaii (Big Island)	HI	1,502	37	48.0	7
Oahu Island (Honolulu) / Waikiki	HI	4,175	10	43.7	8
Chicago	IL	8,336	4	41.3	9
Oakland	CA	1,781	29	40.2	10
El Paso	TX	713	68	39.1	11
San Diego	CA	7,598	6	37.9	12
Tucson	AZ	1,703	30	36.2	13
Seattle	WA	4,155	11	35.5	14
San Francisco	CA	8,073	5	33.9	15
Quad Cities	IL	356	98	33.4	16
Austin	TX	3,751	13	32.6	17
Philadelphia	PA	3,241	14	32.5	18
Anchorage	AK	606	75	31.6	19
Boise	ID	587	78	31.2	20
Providence	RI	624	73	30.9	21
Phoenix	AZ	2,544	17	30.7	22
Albuquerque	NM	1,183	42	30.7	23
San Jose	CA	2,164	23	26.5	24
Houston	TX	4,055	12	25.9	25
Minneapolis	MN	1,681	31	25.3	26
Cincinnati	OH	1,574	35	24.8	27
Reno / Sparks	NV	870	56	24.6	28
Louisville	KY	1,070	47	24.5	29
San Antonio	TX	2,782	16	23.4	30
Tampa / St Petersburg	FL	2,824	15	23.3	31



2015 NATIONAL TOURISM QUALITY PERFORMANCE RANKINGS

Destination	State	Total Quality Exp.	Absolute Rank	Exp/100,000 Visitors	Index Rank
Norfolk	VA	447	88	22.2	32
Richmond	VA	1,018	48	22.1	33
Kansas City	MO	1,168	43	22.0	34
Raleigh	NC	1,128	44	21.9	35
Jacksonville	FL	1,456	38	21.6	36
Fairbanks	AK	207	114	21.5	37
Denver	CO	2,450	20	21.5	38
Sarasota	FL	722	66	21.2	39
Charlotte	NC	1,557	36	21.1	40
New Orleans	LA	2,145	24	20.9	41
Sacramento	CA	1,963	25	20.8	42
Columbus	OH	1,581	34	20.5	43
St Louis	MO	1,838	28	20.5	44
Omaha	NE	915	55	20.5	45
Wichita	KS	558	81	20.4	46
Colorado Springs	CO	850	57	20.3	47
Huntsville	AL	403	93	20.0	48
Baltimore	MD	1,271	40	19.9	49
Newport News	VA	213	112	19.7	50
Indianapolis	IN	1,627	32	19.6	51
Portland	ME	485	86	19.6	52
Washington	DC	2,181	22	19.5	53
Spokane	WA	615	74	19.5	54
Memphis	TN	1,003	49	19.3	55
Milwaukee	WI	1,193	41	19.3	56
Tulsa	OK	825	60	19.1	57
Pittsburgh	PA	1,447	39	19.0	58
Tallahassee	FL	392	95	18.8	59
Salt Lake City	UT	980	51	18.4	60
Cedar Rapids	IA	204	115	18.2	61
Greensboro	NC	471	87	17.7	62



2015 NATIONAL TOURISM QUALITY PERFORMANCE RANKINGS

Destination	State	Total Quality Exp.	Absolute Rank	Exp/100,000 Visitors	Index Rank
Fresno	CA	754	63	17.3	63
Wilmington	NC	552	82	17.2	64
Long Island	NY	1,121	45	17.1	65
Akron	OH	294	101	17.1	66
Springfield	MO	492	85	17.0	67
Boston	MA	1,880	27	16.9	68
Buffalo	NY	795	62	16.8	69
Greenville / Spartanburg	SC	595	77	16.7	70
Grand Rapids	MI	574	79	16.7	71
Las Vegas	NV	4,208	9	16.1	72
Madison	WI	754	63	15.9	73
Oklahoma City	OK	996	50	15.5	74
Fort Worth	TX	1,077	46	15.4	75
Miami	FL	2,469	19	15.1	76
Flint	MI	190	119	15.0	77
Nashville	TN	1,609	33	14.5	78
Burlington	VT	233	109	14.4	79
Billings	MT	235	108	14.3	80
Rochester	NY	725	65	14.3	81
Charleston	SC	939	53	14.2	82
Dallas	TX	2,490	18	14.2	83
Lexington	KY	597	76	14.1	84
Cleveland	OH	944	52	14.0	85
Juneau	AK	215	111	13.8	86
Baton Rouge	LA	542	83	13.7	87
Columbia	SC	572	80	13.4	88
Dayton	OH	445	89	13.4	89
Santa Barbara	CA	838	59	13.1	90
Detroit	MI	715	67	13.0	91
Savannah	GA	825	60	12.9	92
Lubbock	TX	291	102	12.8	93



2015 NATIONAL TOURISM QUALITY PERFORMANCE RANKINGS

Destination	State	Total Quality Exp.	Absolute Rank	Exp/100,000 Visitors	Index Rank
Knoxville	TN	661	70	12.7	94
Pensacola	FL	412	91	12.6	95
Orlando	FL	4,887	8	12.5	96
Atlanta	GA	2,347	21	12.5	97
Fayetteville	NC	321	99	12.3	98
Trenton	NJ	139	121	12.0	99
Birmingham	AL	641	72	11.6	100
Midland / Odessa	TX	216	110	11.5	101
Manchester	NH	204	115	11.5	102
Palm Springs	CA	688	69	11.5	103
Des Moines	IA	397	94	11.4	104
Hartford	CT	200	117	10.9	105
Corpus Christi	TX	377	96	10.7	106
Amarillo	TX	245	106	10.6	107
Little Rock	AR	406	92	10.6	108
Green Bay	WI	247	105	10.4	109
Fort Lauderdale	FL	846	58	9.6	110
Fort Myers	FL	516	84	9.3	111
West Palm Beach	FL	429	90	9.1	112
Albany	NY	359	97	8.5	113
Newark	NJ	242	107	8.3	114
Harrisburg	PA	261	104	8.0	115
Myrtle Beach	SC	660	71	7.8	116
Allentown	PA	197	118	7.8	117
Syracuse	NY	309	100	7.1	118
Jackson	MS	176	120	5.7	119
Biloxi / Gulfport	MS	267	103	5.5	120
Atlantic City	NJ	208	113	3.1	121



2015 LARGE DESTINATION TOURISM QUALITY PERFORMANCE RANKINGS

Destination	State	Total Quality Exp.	Absolute Rank	Exp/100,000 Visitors	Index Rank
Los Angeles	CA	19,202	2	54.8	1
New York City	NY	20,362	1	51.8	2
Anaheim / Orange County	CA	8,971	3	49.0	3
Chicago	IL	8,336	4	41.3	4
San Diego	CA	7,598	6	37.9	5
Seattle	WA	4,155	9	35.5	6
San Francisco	CA	8,073	5	33.9	7
Austin	TX	3,751	11	32.6	8
Houston	TX	4,055	10	25.9	9
San Antonio	TX	2,782	13	23.4	10
Tampa / St Petersburg	FL	2,824	12	23.3	11
Denver	CO	2,450	16	21.5	12
New Orleans	LA	2,145	19	20.9	13
Washington	DC	2,181	18	19.5	14
Boston	MA	1,880	20	16.9	15
Las Vegas	NV	4,208	8	16.1	16
Miami	FL	2,469	15	15.1	17
Nashville	TN	1,609	21	14.5	18
Dallas	TX	2,490	14	14.2	19
Orlando	FL	4,887	7	12.5	20
Atlanta	GA	2,347	17	12.5	21



2015 MEDIUM DESTINATION TOURISM QUALITY PERFORMANCE RANKINGS

Destination	State	Total Quality Exp.	Absolute Rank	Exp/100,000 Visitors	Index Rank
Portland	OR	6,702	1	96.9	1
Oahu Island (Honolulu) / Waikiki	HI	4,175	2	43.7	2
Oakland	CA	1,781	8	40.2	3
Tucson	AZ	1,703	9	36.2	4
Philadelphia	PA	3,241	3	32.5	5
Phoenix	AZ	2,544	4	30.7	6
San Jose	CA	2,164	5	26.5	7
Minneapolis	MN	1,681	10	25.3	8
Cincinnati	OH	1,574	13	24.8	9
Louisville	KY	1,070	23	24.5	10
Richmond	VA	1,018	24	22.1	11
Kansas City	MO	1,168	19	22.0	12
Raleigh	NC	1,128	20	21.9	13
Jacksonville	FL	1,456	15	21.6	14
Charlotte	NC	1,557	14	21.1	15
Sacramento	CA	1,963	6	20.8	16
Columbus	OH	1,581	12	20.5	17
St Louis	MO	1,838	7	20.5	18
Omaha	NE	915	30	20.5	19
Colorado Springs	CO	850	31	20.3	20
Baltimore	MD	1,271	17	19.9	21
Indianapolis	IN	1,627	11	19.6	22
Memphis	TN	1,003	25	19.3	23
Milwaukee	WI	1,193	18	19.3	24
Tulsa	OK	825	34	19.1	25
Pittsburgh	PA	1,447	16	19.0	26



2015 MEDIUM DESTINATION TOURISM QUALITY PERFORMANCE RANKINGS

Destination	State	Total Quality Exp.	Absolute Rank	Exp/100,000 Visitors	Index Rank
Salt Lake City	UT	980	27	18.4	27
Fresno	CA	754	37	17.3	28
Long Island	NY	1,121	21	17.1	29
Buffalo	NY	795	36	16.8	30
Madison	WI	754	37	15.9	31
Oklahoma City	OK	996	26	15.5	32
Fort Worth	TX	1,077	22	15.4	33
Rochester	NY	725	39	14.3	34
Charleston	SC	939	29	14.2	35
Lexington	KY	597	45	14.1	36
Cleveland	OH	944	28	14.0	37
Columbia	SC	572	46	13.4	38
Santa Barbara	CA	838	33	13.1	39
Detroit	MI	715	40	13.0	40
Savannah	GA	825	34	12.9	41
Knoxville	TN	661	42	12.7	42
Birmingham	AL	641	44	11.6	43
Palm Springs	CA	688	41	11.5	44
Fort Lauderdale	FL	846	32	9.6	45
Fort Myers	FL	516	47	9.3	46
West Palm Beach	FL	429	48	9.1	47
Albany	NY	359	49	8.5	48
Myrtle Beach	SC	660	43	7.8	49
Syracuse	NY	309	50	7.1	50
Biloxi / Gulfport	MS	267	51	5.5	51
Atlantic City	NJ	208	52	3.1	52



2015 SMALL DESTINATION TOURISM QUALITY PERFORMANCE RANKINGS

Destination	State	Total Quality Exp.	Absolute Rank	Exp/100,000 Visitors	Index Rank
Kauai Island	HI	936	4	59.3	1
Maui Island	HI	1,939	1	49.8	2
Hawaii (Big Island)	HI	1,502	2	48.0	3
El Paso	TX	713	7	39.1	4
Quad Cities	IL	356	28	33.4	5
Anchorage	AK	606	10	31.6	6
Boise	ID	587	12	31.2	7
Providence	RI	624	8	30.9	8
Albuquerque	NM	1,183	3	30.7	9
Reno / Sparks	NV	870	5	24.6	10
Norfolk	VA	447	20	22.2	11
Fairbanks	AK	207	41	21.5	12
Sarasota	FL	722	6	21.2	13
Wichita	KS	558	14	20.4	14
Huntsville	AL	403	24	20.0	15
Newport News	VA	213	40	19.7	16
Portland	ME	485	18	19.6	17
Spokane	WA	615	9	19.5	18
Tallahassee	FL	392	26	18.8	19
Cedar Rapids	IA	204	42	18.2	20
Greensboro	NC	471	19	17.7	21
Wilmington	NC	552	15	17.2	22
Akron	OH	294	30	17.1	23
Springfield	MO	492	17	17.0	24



2015 SMALL DESTINATION TOURISM QUALITY PERFORMANCE RANKINGS

Destination	State	Total Quality Exp.	Absolute Rank	Exp/100,000 Visitors	Index Rank
Greenville / Spartanburg	SC	595	11	16.7	25
Grand Rapids	MI	574	13	16.7	26
Flint	MI	190	46	15.0	27
Burlington	VT	233	37	14.4	28
Billings	MT	235	36	14.3	29
Juneau	AK	215	39	13.8	30
Baton Rouge	LA	542	16	13.7	31
Dayton	OH	445	21	13.4	32
Lubbock	TX	291	31	12.8	33
Pensacola	FL	412	22	12.6	34
Fayetteville	NC	321	29	12.3	35
Trenton	NJ	139	48	12.0	36
Midland / Odessa	TX	216	38	11.5	37
Manchester	NH	204	42	11.5	38
Des Moines	IA	397	25	11.4	39
Hartford	CT	200	44	10.9	40
Corpus Christi	TX	377	27	10.7	41
Amarillo	TX	245	34	10.6	42
Little Rock	AR	406	23	10.6	43
Green Bay	WI	247	33	10.4	44
Newark	NJ	242	35	8.3	45
Harrisburg	PA	261	32	8.0	46
Allentown	PA	197	45	7.8	47
Jackson	MS	176	47	5.7	48



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