The Experience Dedicated® Destination

EXPERIENCE REPORT

ROCHESTER / YEAR ONE

April 2015 – March 2016

V.2

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Table of Contents

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A quality experience is paramount to the total number of visitors, visitor spending & return intentions.

HOW ARE WE DOING?

WHAT DO WE NEED TO WORK ON TO STAY COMPETITIVE?

- **Our Destination Strategic Plan:** Staying competitive against other destinations is vital to future economic growth. Together we will meet our destination goals and vision..
- **Have We 'Moved the Needle'— Meaningful Metrics:** This report provides indicators reflecting real-time and trend-line metrics on how we're doing against the industry standards & best practices, and eventually against other destinations.
- **Official Accreditation:** We are proud to be the one of the very first destinations to be accredited as an *Experience Dedicated™ Destination* (EDD: We are **Ed**) — a symbol of quality that shows the public that we care about their experience.
- **Market Insight You Can't Gain On Your Own:** You'll gain valuable insight from other businesses in your sector that you can't get on your own; to inform your marketing and sales strategies.

That's the power of **Ed**.

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EXECUTIVE SUMMARY

YEAR ONE

April 2015—March 2016

This complete *Experience Report* will be provided to participating EDD businesses once per year at the end of the 12-month cycle, which ends in March. The report shows indicators against the consumer-driven standards on a 0.0 − 10.0 scale to easily compare measures and to provide trend-line data over time.

IMPORTANT NOTE: The number of visitor surveys completed was extremely low for Year One. Therefore, the 0.0—10.0 indicators throughout this report should be viewed as 'directional' only.

ACHIEVING A STRENGTHENED COMPETITIVE POSITION
Financial Measures

See Page 5 (and pp. 6-11) — three indicators helped bring this to a 7.0 overall for Year One — *Growth in Visitors/Customers, Visitor Spending,* and *Satisfaction with the Destination Experience,* which were all three strong in the first three-months of April-June 2015.

ZEALOUS FOCUS ON VISITORS / CUSTOMER
Customer Measures

See page 5 (and pp. 12-14) *Satisfaction with Destination Essentials (Clean, Safe, etc.)* was the highest in the Green, followed by *Destination Image* and *Repeat Visits.* The three, together, brought Customer Measures to an overall 6.5, almost into the Green. *Businesses Reinforce the Destination Image* was high at 8.4, showing businesses care about the destination image.

EXCELLING AT PROCESSES THAT DRIVE OUR DESTINATION STRATEGY
Process Measures

See page 5 (and pp. 15-16). *Participation in Data Collection & Research* is low at 5.6 overall. Getting more visitors and local businesses to complete the EDD surveys is critical to having input against the standards and year-over-year metrics. Most of the metric are weighted heavily to survey completion, e.g. more surveys may mean higher scores. *Satisfaction With the Destination Product,* at 5.8 overall, shows room for improvement as does *Product Gaps* at 5.6.

EQUIPPING OUR PEOPLE INFRASTRUCTURE AND SUSTAINING OUR ABILITY TO CHANGE & IMPROVE
Learning & Growth, People Measures

See page 5 (and p. 17). *Destination-wide Alignment to Strategic Plan* is in the Green at 7.1, with *Front-line Trained to Strategy* at 8.4. *Visitors Felt Welcomed* was at 8.1. A remarkable 9.4 *Businesses Aligned to Destination Strategy* and 9.8 *Businesses* (have) *Experience-focused Mission Statements* shows that participating businesses are very much involved in shaping your destination's future — for which most destinations would be envious!

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OUR EXPERIENCE SCORECARD

High-Level Objectives: Year-Over-Year

Rochester
YEAR ONE
April 2015—March 2016

Key Performance Indicators (KPI) Balanced Scorecard 18 Strategic Measures		YEAR ONE Apr '15-Mar '16	YEAR TWO Apr '16-Mar '17	YEAR THREE Apr '17-Mar '18	YEAR FOUR Apr '18-Mar '19	YEAR FIVE Apr '19-Mar '20
OVERALL:		6.5				
COMPETITIVE POSITION	**Y1: 7.0**					
F1	Growth in Visitors / Customers	8.1				
F2a	Destination Asset Utilization: 'Visitors Doing More Things'	5.2				
F2b	Visitor / Customer Spending	7.2				
F3	Satisfaction with Destination Experience	6.7				
CUSTOMER FOCUS	**Y1: 6.5**					
C1	Image Differentiation (Destination Image Compared to Other Cities)	6.8				
C2	Target Market Matches Assets ("Ideal Market" for Our Offerings)	5.5				
C3	Destination Information Resources (Ease of Use, Accurate, etc.)	6.5				
C4a	Satisfaction with Destination Essentials (Clean, Safe, etc.)	7.1				
C4b	Experience Exceeded Expectations	6.4				
C5a	Repeat Visits	6.8				
C5b	Recommendations / Referrals	6.6				
PROCESS EXCELLENCE	**Y1: 6.0**					
P1	Participation in Data Collection / Research	5.6				
P2a	Satisfaction with Destination 'Product' (What We Offer)	5.8				
P2b	Product 'Gaps' (What Visitors Want & Tourism Infrastructure Plan)	5.6				
P3	Visitor / Customer Complaints / Service Recovery Program	6.5				
PEOPLE INFRASTRUCTURE	**Y1: 6.4**					
L1	Sector / Stakeholders Aligned to Destination Strategy	7.1				
L2	Community / Citizens Aligned to Destination Strategy	3.6				
L3	Front-line Trained to Destination Strategy	8.4				

ACHIEVING A STRENGTHENED COMPETITIVE POSITION
Financial Measures
Pages 6-11

ZEALOUS FOCUS ON VISITORS / CUSTOMER
Customer Measures
Pages 12-14

EXCELLING AT PROCESSES THAT DRIVE OUR DESTINATION STRATEGY
Process Measures
Pages 15-16

EQUIPPING OUR PEOPLE INFRASTRUCTURE AND SUSTAINING OUR ABILITY TO CHANGE & IMPROVE
Learning & Growth, People Measures
Page 17

UNDERPERFORMING 0.0-3.3 | MAINTAINING 3.4-6.6 | EXCEEDING TARGET 6.7- 10.0

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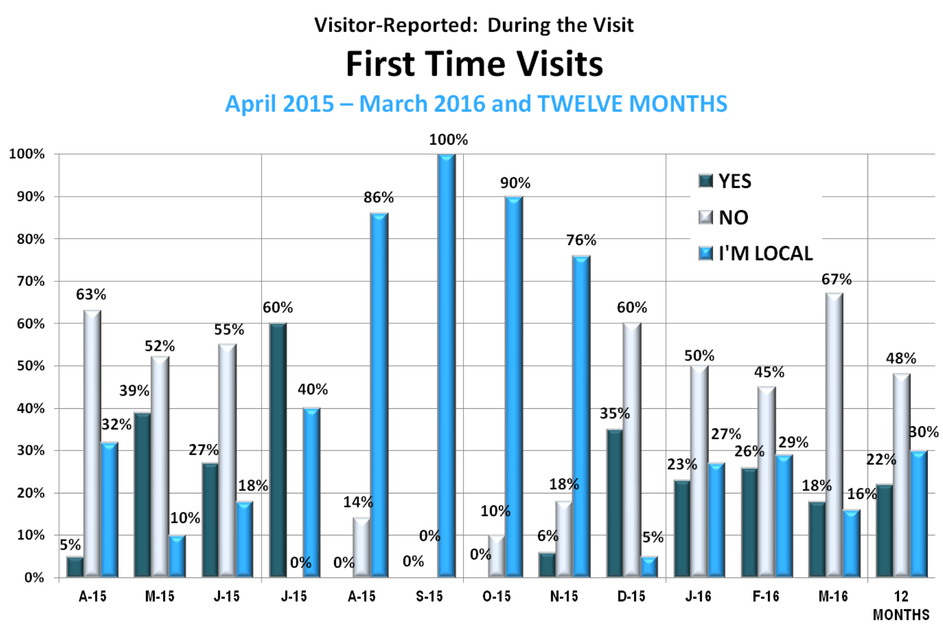
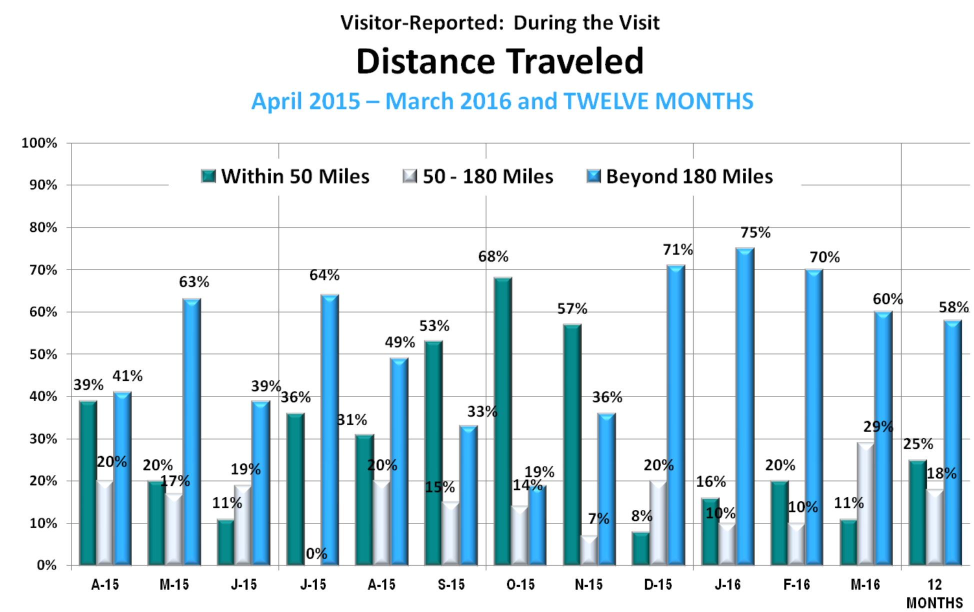
IS THIS THEIR FIRST VISIT?



Of the visitors answering this question in Year One, 22% reported it was their first visit, with another 48% having visited before. Local responses are separated out and were 30% for the year.

HOW FAR DID THEY TRAVEL?



All respondents are asked to provide their Zip Code or Country Code. For Year One, 58% were *Beyond 180 Miles,* with 18% *Between 50-180 Miles*, and 15% *Local (within 50 miles).*

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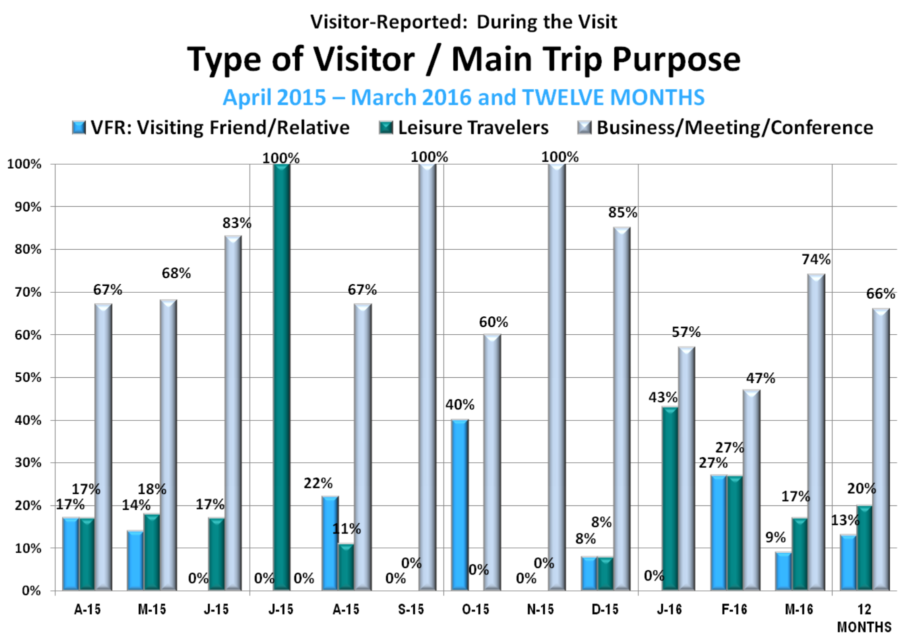
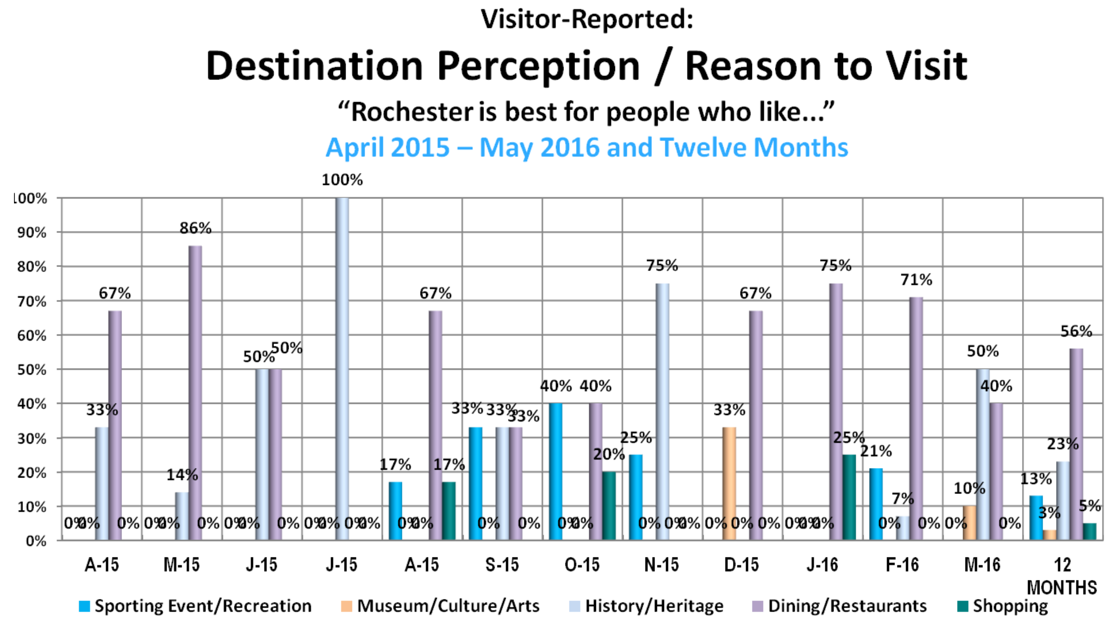
Strategic Objective: **INCREASED NUMBER OF VISITORS**

WHO VISITED?

WHAT ARE OUR DESTINATION DRIVERS?





Of the visitors answering this question in Year One, the majority were visiting for *Business/Meeting/Conference* at 66%. *Leisure Travelers* were 20%, with *VFR: Visiting Friends/Relatives* at 13%.

Visiting Due to Medical Appointments: Beginning September 2015, all respondents were asked this question. For the last 7 months of Year One, those *Visiting for Medical Appointments* was 44%, which will be interesting to monitor over the years.

"Rochester is best for people who like.." Of the visitors answering this question for Year One, *Dining/Restaurants was at 56%.* The next highest was 23% *History/Heritage*, with 13% *Sports;* 5% *Shopping*; and 3% *Museum/Culture/Arts*. This perception question is interesting to watch over time.

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SECTOR *'Vital Signs'*

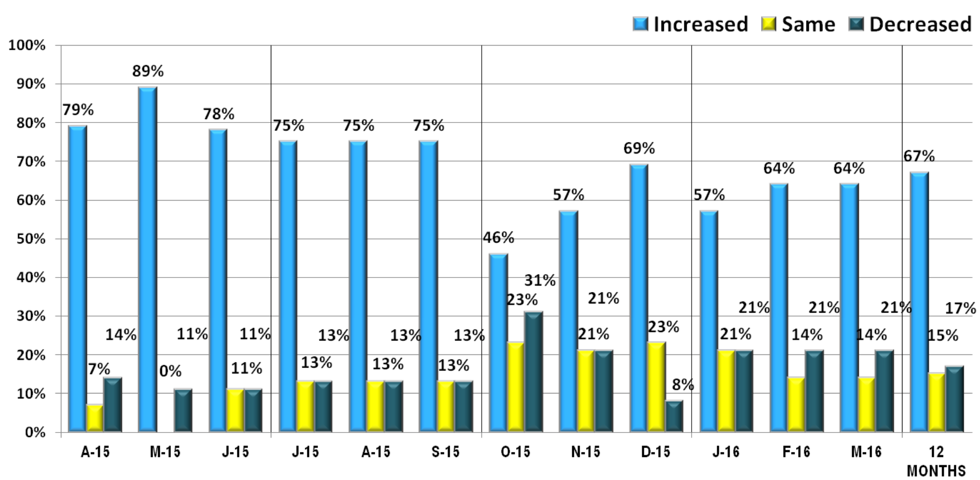
Vital Sector Growth Indicators

| ARE WE INCREASING VISITORS / CUSTOMERS? |

Business/Stakeholder-Reported:

Number of Customers – All Sectors Combined

vs. Same Month Year Ago – April 2015-March 2016 and 12-MONTHS



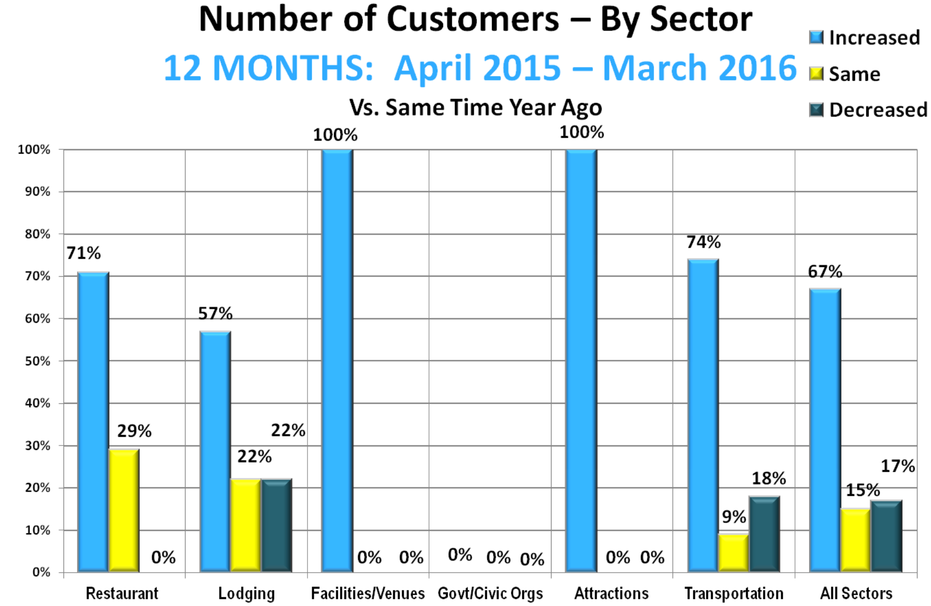
These indicators are derived from the quarterly **Visitor/Customer Growth Survey,** completed by participating EDD stakeholders. Of those businesses reporting, 67% reported their *Number of Customers* had increased over the same month one year ago. Only 17% reported a decrease for Year One.

Business/Stakeholder-Reported

Number of Customers – By Sector

12 MONTHS: April 2015 – March 2016

Vs. Same Time Year Ago



Same data, now broken down by the Six Sectors. Again, all Sectors reporting saw an increase in *Number of Customers.*

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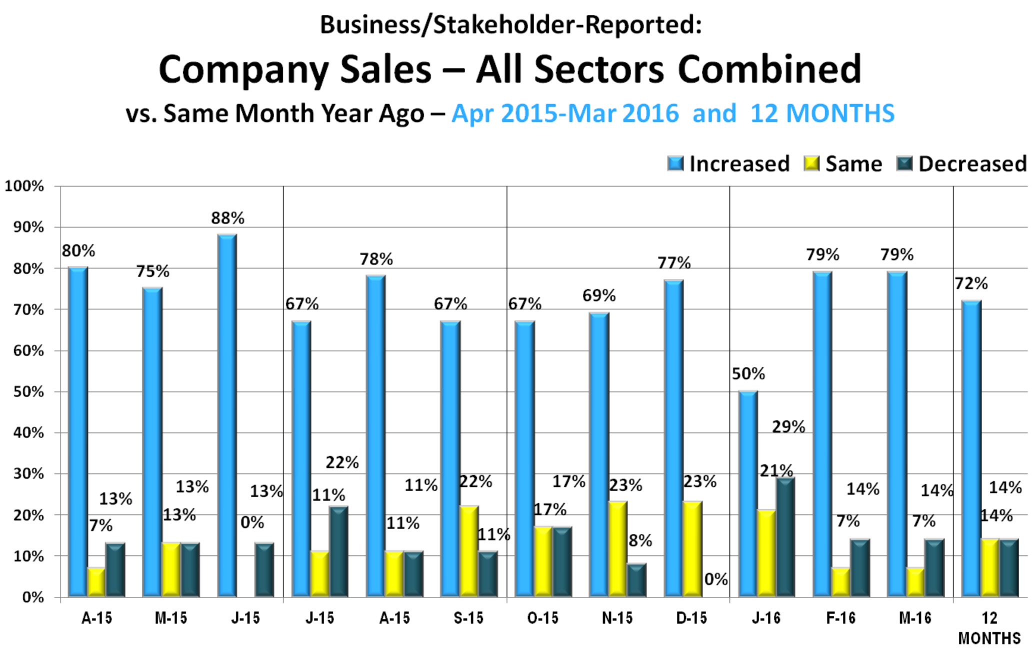
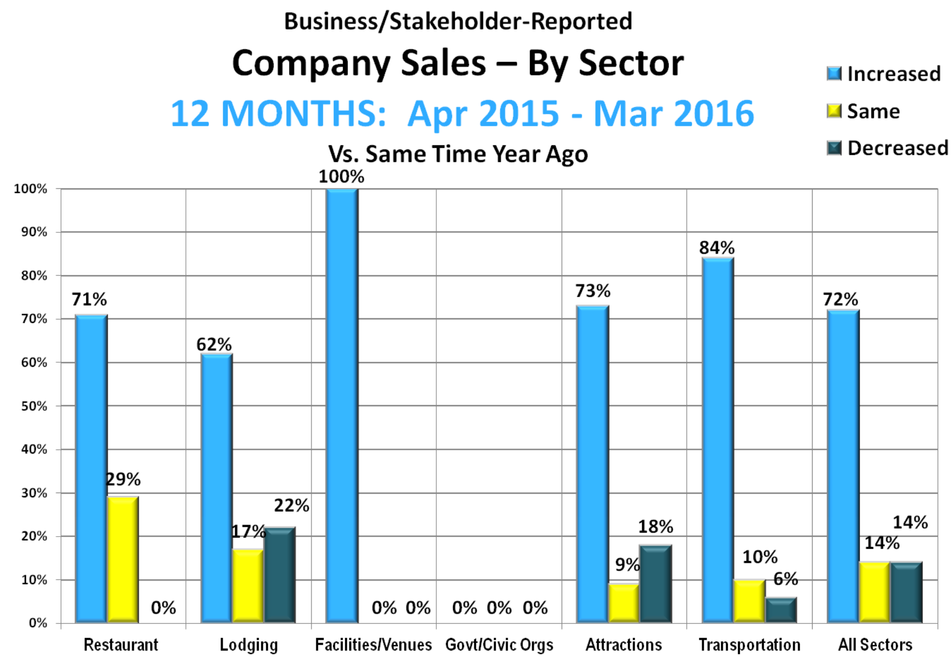
SECTOR *'Vital Signs'*

Vital Sector Growth Indicators

| ARE WE INCREASING SPENDING? |





Again, these indicators are derived from the quarterly **Visitor/Customer Growth Survey.** Again, 72% of reporting businesses saw an Increase *in Company Sales* for Year One. January was the slowest for sales growth at 50%; with June the highest at 88%.

When broken down by sector for Year One, of the five sectors reporting, all had *Increased* company sales for the year, with *Facilities/Venues* reporting having no *Same* or *Decreased* sales for any month. *Transportation Sector* was second with 84%. All-in-all good metrics!

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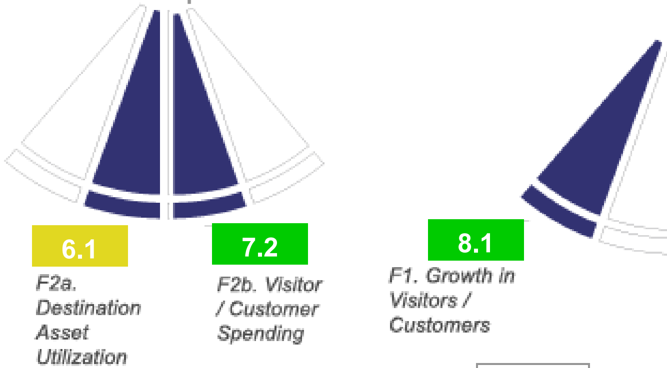
Strategic Objective: **INCREASED ASSET UTILIZATION & VISITOR SPENDING**



ARE WE INCREASING VISITORS?
ARE VISITORS DOING MORE THINGS?
ARE WE INCREASING SPENDING?

YEAR ONE

Growth in Visitors / Customers — 8.1

The charts on the Page 8, *Growth in Visitors / Customers* feed this measure.

Destination Asset Utilization — 5.2

Visitors: Found Complete List 'Things to Do'	5.5
Businesses: Link to CVB Website	4.6
Businesses: Cross-Promote / Market	9.5
Visitors: Made Aware of New Experiences	5.7

This standard measures whether visitors are finding your Assets or Things to Do.

BEST PRACTICE TO INCREASE THIS:

All CVB Member businesses add the CVB link to their website.

Highest of all measures! Businesses are indicating they cross-promote Rochester experiences.

Visitor/Customer Spending — 7.2

The charts on Page 9, *Sales Per Customer,* feed this measure.

Visitors: Overnight Stays	9.3
Visitors: Length of Stay	7.5
Visitors: Extended My Stay	6.0
Visitors: Did More Things	6.0

These four standards measure whether the destination is getting visitors to do more things = more spending and 'word-of-mouth'. *Overnight Stays* is high at 9.3!

BEST PRACTICE TO INCREASE THIS:

Train your team to encourage visitors to 'do more things' or extend their stay.

UNDERPERFORMING 0.0-3.3 | MAINTAINING 3.4-6.6 | EXCEEDING TARGET 6.7- 10.0

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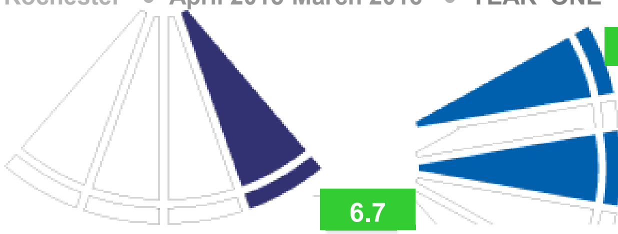
Strategic Objective: **HIGH VISITOR SATISFACTION RATINGS**

Strategic Objective: **SEAMLESS EXPERIENCES / EXCEEDING EXPECTATIONS**



ARE WE INCREASING SATISFACTION? ARE WE EXCEEDING EXPECTATIONS?

YEAR ONE

Satisfaction: Overall Destination Experience — 6.7

Visitors, Businesses, and the CVB report into this standard on the *Overall Destination Experience,* which is important to watch.

Visitor / Customer-Reported Satisfaction	6.6
Business-Reported Satisfaction	7.5
CVB & Businesses: Social Media is Positive	7.3
Visitors: Destination Experience Improved	6.0

All Inputs: Satisfaction Destination 'Essentials' — 7.1

Safety	7.8
Cleanliness	7.6
Way-finding / Signage	6.2
Ease of Getting Around	4.9
Friendly, Helpful People	8.9

Way-finding / Signage and *Ease of Getting Around* are two important measures that impact overall spending and word-of-mouth.

Another high measure!

Visitors: Experience Exceeded Expectations — 6.8

UNDERPERFORMING 0.0-3.3 MAINTAINING 3.4-6.6 EXCEEDING TARGET 6.7- 10.0

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ZEALOUS FOCUS ON VISITORS / CUSTOMERS

Customer Measures

Rochester • April 2015-March 2016 • YEAR ONE

Strategic Objective: **CONSENSUS DISTINCT BRAND IMAGE & SINGULAR MARKETING MESSAGE**

6.8 *C1. Image Differentiation*

DOES OUR DESTINATION STAND OUT? WHAT IS OUR IMAGE?

	YEAR ONE
Destination Image: Differentiation from Other Cities	6.8
Visitors: Rochester Has Distinct Image	6.4
Businesses: Rochester Has Distinct Image	5.8
Visitors: Memorable vs. Other Destinations	6.3
Visitors: Appealing vs. Other Destinations	6.6
Businesses: Image is Accurate	6.8
Businesses: Image is Improving	6.9
Visitors: Image Clarity 'I Know What This Place is About'	6.5
Consistent / Singular Destination Message	6.7
Visitors: See Consistent Destination Message	6.8
Businesses: Promote Consistent Message	6.7
Businesses: Reinforce Destination Image	8.4

Interestingly, Visitors report Rochester has a more *Distinct Image* than do Businesses.

Higher than the two metrics pointed out above, Businesses believe Rochester's *Image* is *Accurate* and *Improving* at 6.8 and 6.9, respectively.

Business indicate they *Reinforce the Destination Image* at 8.4, which one of the highest indicators for this period.

UNDERPERFORMING 0.0-3.3 MAINTAINING 3.4-6.6 EXCEEDING TARGET 6.7- 10.0

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Strategic Objective: **CENTRAL, TRUSTED SOURCE FOR INFO / ASSISTANCE / BOOKINGS**

ARE VISITORS FINDING US?
ARE THEY ACCESSING AREA INFO?

	YEAR ONE
Destination Information Resources	**6.5**
Visitors: Easy to Access Destination Info.	7.2
Visitors: Ease vs. Other Destinations	5.5
CVB: Provide Personal Support 24 / 7	6.6

Easily accessing destination information is key to increasing spending.

Visitors: Area Websites Valuable Resource	**7.3**
Area Websites Give Positive Impression	7.0
Area Websites Give Consistent Info	7.5
Area Websites Seemed Accurate	7.3

Visitors’ impressions of the destination include what they think of area web-sites as they plan their trip or ‘things to do’. Starting out at 7.3 is good.

Visitors: CVB Website Usage	**5.2**
Visitors: Used CVB Website	3.2
Visitors: CVB Website is Helpful	7.0

Many visitors do not find the CVB website; but those who have found it helpful at 7.0.

UNDERPERFORMING 0.0-3.3 | MAINTAINING 3.4-6.6 | EXCEEDING TARGET 6.7- 10.0

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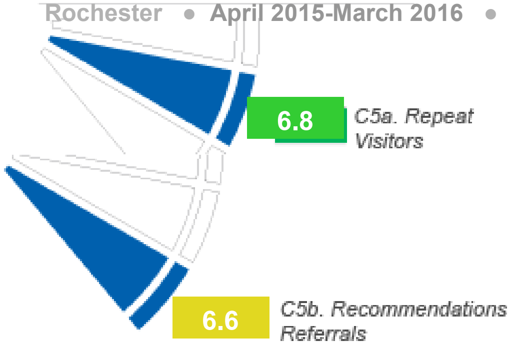
Strategic Objective: **RETURN VISITS, RECOMMENDATIONS & REFERRALS**



ARE WE INCREASING REPEAT VISITS? RETURN INTENTIONS?

	YEAR ONE
Repeat Visitors	**6.8**
Visitors: Return Intentions	6.8
Businesses: Repeat Customers	6.7
Businesses: Encourage Repeat Visits	6.1
Recommendations / Referrals	**6.6**
Visitors: Visited Due to Word of Mouth	5.1
Visitors: Visited Due to Recommendation	3.1
Visitors: Sought Info Based on Referral	8.4
Visitors: Will Recommend Dest. To Others	7.3

These metrics are starting out high, which is positive for the destination.

UNDERPERFORMING 0.0-3.3 | MAINTAINING 3.4-6.6 | EXCEEDING TARGET 6.7- 10.0

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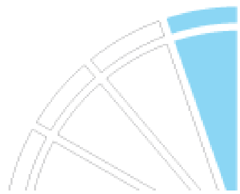
EXCELLING AT PROCESSES THAT DRIVE OUR DESTINATION STRATEGY

Process Measures

Rochester ● April 2015-March 2016 ● YEAR ONE

Strategic Objective: **CENTRAL REPOSITORY OF ONGOING VISITOR DATA**

P1. Participation in Data Collection / Research 5.6



ARE WE ENCOURAGING SURVEY COMPLETION? HOW ELSE WILL WE KNOW HOW WE'RE DOING?

Participation in Data Collection / Research

YEAR ONE **5.6**

Visitor / Consumer Survey Participation	3.0
Businesses: Promote Consumer Surveys	7.6
Businesses: Completing EDD Surveys	5.8
Businesses: Conduct Own Satisfaction Surveys	7.3
Businesses: Monitor Social Media Feedback	8.0

UNDERPERFORMING 0.0-3.3 MAINTAINING 3.4-6.6 EXCEEDING TARGET 6.7- 10.0

Getting more businesses to complete the surveys to feed data into EDD is important..

Number of Visitors / Customers Completing EDD Surveys

	YEAR ONE	YEAR TWO
Actual	1,262	
Target*	21,888	21,888

* *1,824 X 12 = 21,888*

Visitor / Consumer Surveys:

Phase of Visit	YEAR ONE	YEAR TWO
Pre Visit	9%	
During Visit	87%	
Post Visit	5%	

Number of *Count Us In* Businesses = 48

Actual Total EDD Monthly & Annual Surveys Completed

Survey Type	Apr	May	Jun	Jul	Aug	Sep	Oct	Nov	Dec	Jan	Feb	Mar	YEAR ONE	Survey Goal
Monthly Growth	15	10	9	12	12	12	15	15	15	17	17	17	14 Average/Month	GOAL: 48
Annual Insight		N/A			N/A			N/A				19	19 Year One	GOAL: 48
Visitor Survey		298			119			243			602		1,262 Total	GOAL: 21,888

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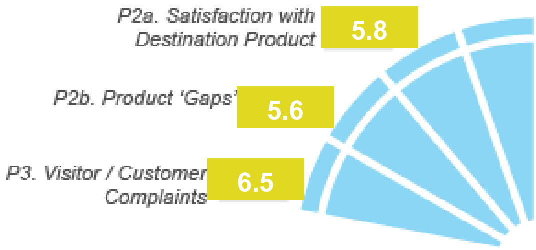

DO VISITORS LIKE OUR 'PRODUCT'? ARE THERE 'GAPS'?

Satisfaction with the Destination 'Product' is important, as it feeds the destination image. Several metrics may be lowered, as a result.

	YEAR ONE
Satisfaction with Destination 'Product'	**5.8**
All Inputs: Overall Product Satisfaction	5.9
Product Experience Reinforces Dest. Image	5.5
Product 'Gaps'	**5.6**
Visitors: Things to Do Matched Interests	6.1
Businesses: Share Product Gaps	6.6
Dest. Product Visioning & Planning Method	6.6
Tourism Infrastructure Funding Plan in Place	6.6
Protecting Unique Destination Assets Plan	3.4
Visitor / Customer Complaints	**6.5**
Businesses: Visitor Complaints re: 'Product'	8.1
Dest. Service Recovery System in Place	6.4

Interestingly, businesses report fewer visitor complaints

Visitors/Consumers: Product Satisfaction by Sector

	YEAR ONE
'Things to Do' / Attractions Experience	4.6
Restaurants / Dining Experience	7.6
Lodging / Hotel Experience	8.7
Transportation Experience	6.9
Venues / Facilities Experience	6.5
Govt. / Clean & Safe Experience	7.9

UNDERPERFORMING 0.0-3.3 MAINTAINING 3.4-6.6 EXCEEDING TARGET 6.7- 10.0

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EQUIPPING OUR PEOPLE INFRASTRUCTURE AND SUSTAINING OUR ABILITY TO CHANGE & IMPROVE

Learning & Growth, People Measures

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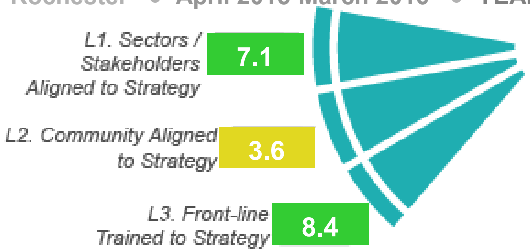

Strategic Objective: **DESTINATION-WIDE ALIGNMENT TO STRATEGY PLAN**

Strategic Objective: **WELCOMING COMMUNITY ALIGNED TO STRATEGY**

Strategic Objective: **SERVICE-ORIENTED WORKFORCE ALIGNED TO STRATEGY**

ARE WE WORKING TOGETHER?
IS OUR FRONT-LINE KNOWLEDGEABLE?

Destination-wide Alignment to Strategy Plan — YEAR ONE: 7.1

Businesses Aligned to Destination Strategy	9.4
Visitors: Dest-wide Cooperation Matters	7.5
Businesses: Experience Focused Mission	9.8
Businesses: Cross-communicate w/Others	5.5
Businesses: Aligned to Destination Brand	3.4

Amazingly high for your first report. Congratulations!

Reporting businesses believe other businesses are aligned to the *Destination Strategy* above, but not as much to the *Destination Brand.*

Community / Citizens Aligned to Strategy — 3.6

Citizen Engagement Program in Place	6.6
Visitors: Felt Welcomed	8.1

Nice indicators here!

Front-line Trained to Destination Strategy — 8.4

Visitors: People Were Service-Oriented	8.4
Visitors: People Knowledgeable About Destination	8.1
Front-line Product Training in Place	8.6
Business Participation: Front-line Training	9.2

UNDERPERFORMING 0.0-3.3 MAINTAINING 3.4-6.6 EXCEEDING TARGET 6.7- 10.0

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What Are We Hearing From Visitors / Consumers?

Rochester ● **January February March 2016 Period** ● Select Real-time Comments Reflective of the Whole

Beautiful city. Everyone was so nice and helpful and knowledgeable .

As a local artist I really enjoy the scene here in town. We need a new Studio Academy art school for our kids.

More small businesses, cafes, shops downtown. More advertising of the great stuff we have going on. A movie theater downtown.

I wish there was more live entertainment/ live music.

NOTHING FOR KIDS AND FAMILIES!!!! NO indoor playground, roller rink, indoor trampoline, no indoor park, existing playgrounds suck, no splash pad. A children's museum that appeals to 4 and under kids, etc. NOTHING for ages 6-16. IT SUCKS.

More activities for youth. There are plenty for adults and children, but not as many for youth.

We miss Michaels Restaurant. More vegetarian restaurants. Better food options at the Mayo including gluten free options. free parking. More printed maps with destinations clearly marked.

It feels like a generic city for the most part. I wish it had a true water system, lake, or river. The landscape is flat. We should work toward integrating more trees into business parks. I would expect since the population is so large that we could be more developed. I think we should also focus on being innovative since we have a great opportunity to fill our city with new vision as DMC comes into fruition. It would also be great to have more (and safer!!) bike routes and walking paths.

Used www.visitrochestermn.com to find info.

Need detailed maps of the downtown.

Very low-key, expensive, and lopsided selection of activities. Few restaurants and bars but not much else for afternoon/evening activities (especially family friendly).

With the closing of the Barnes & Noble Bookstore in the Clinic area, out of town guests no longer have a gathering place during the day, early evening and especially on weekends. Downtown Rochester is now a cultural wasteland. I know several affluent families who have switched from Mayo to Cleveland Clinic or Hopkins because of Rochester's lack of cultural considerations for out of town visitors.

Very friendly people. The LaQuinta Inn was very awesome.

It has a lot more communal technology than I expected. Passing by Mayo the bus systems look welcoming.

Kahler Hotel is a neat place; skyways are excellent.

We were in Rochester for medical reasons. We stayed at the Microtel South and were treated like family, which was a great experience at a very stressful time. They have a great staff and are dedicated to their customers.

Downtown parking is a challenge. Light rail would be helpful. Mayo employees make downtown congested.

Highly walkable with great access to skywalks. Wonderful non-chain restaurants and I couldn't believe all the people out and about on a Thursday night!

Very inconvenient trying to find parking.

Everyone at Centerstone Plaza Hotel have been so helpful and friendly which made our medical stay so much easier. The shuttle service to and from the Mayo Clinic and St Mary's Hospital gave me more time to focus on the reasons we were coming to Rochester. The convenient location was helpful too. The staff at the front desk were fantastic and made copies for us when we needed it and extended our stay when we found out we had to stay longer. We will be coming back here for medical treatment and will definitely look forward to staying at this hotel.

Our stay at the Hilton was very enjoyable as well as convenient to the Clinic. Lots of very nice eating spots of all types close by, and the best part was that you didn't have to brave the cold weather...all accessible via indoor skyways. Amazing. The volunteers at the various Clinic buildings were very helpful, friendly, and knowledgeable. They were also well prepared to provide recommendations for any and all types of dining cuisines we were looking for. Very nice city. We'll be back.

I had read that there was a bed bug out break. I have not experienced that at all. Everyone helps me find where I need to go. At first I was intimidated but now feel comfortable.

Downtown was very clean and neat. I found two nice pubs. Food was good. Skyway was very clean, well lighted, signage was excellent.

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