

**Visitor Characteristics of Farms
in the Silos and Smokestacks National Heritage Area**



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Sustainable Tourism and the Environment Program

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in the Silos and Smokestacks National Heritage Area**



*Where the Story
of American Agriculture
Comes to Life.™*

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Sustainable Tourism and the Environment Program

Executive Summary of Project

Tourism makes a significant contribution on the communities to Northeast Iowa. Silos and Smokestacks National Heritage Area (SSNHA) has the opportunity to improve the quality of life for citizens, the economic viability of the area and the image of Northeast Iowa in the eyes of the residents and tourists. This study, conducted in co-operation with the Sustainable Tourism and Environment Program, at the University of Northern Iowa and the SSNHA was initiated to help partner sites better serve visitors to the SSNHA and identify opportunities for future initiatives in the SSNHA.

The study includes an analysis of travel characteristics, visitors' demographic profile, spending patterns and marketing assessment and also visitors' satisfaction with six SSNHA farm sites.

The study concluded that:

- The SSNHA relies on repeat visitors (65%) whose primary purpose of their trip was specifically to visit a heritage site. Visitors have had on average five trips to the region. Over half of the visitors (52%) were on a day trip and the other 48% stayed the night.
- Visitors spent more on lodging and shopping than transportation, restaurants and groceries combined. Repeat visitors tended to spend more in every spending category than first time visitors.
- Most of the visitors (50%) did not receive any information before they left on their trip, and 21% had little or no plan before taking the trip. The most common medium where they saw some form of advertisement before visiting the region was a travel publication

(17.2%). While in Iowa, the most common places to receive information was at the place of accommodation (22.7%) and at the local visitors bureau (20.6%).

- The majority of visitors were very satisfied with the scenery (72.4%), historical attractions (82.3%), customer service (48.3%), restaurants and food (44.8%) of the SSNHA farms.

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I. Introduction to Heritage Farms of Silos and Smokestacks National Heritage Area

Heritage Farms that are in Iowa demonstrate and display different farming production techniques. Visitors have the opportunity to participate in activities and also purchase products from the site. Throughout Northeast Iowa the sites span 20,000 square miles and 37 counties

These Heritage Farm sites include:

- 1) Hawkeye Community College Farm Laboratory
- 2) The Dairy Center
- 3) Eagle City Winery
- 4) Living History Farms
- 5) The Ion Exchange
- 6) Seeds Saver Exchange

The SSNHA provides opportunities through the development of a network of sites, programs, and events that help interpret farm life, agribusiness, and rural communities-past, present, and future.

II. Purpose and Objectives of the Study

The purpose of this study is to help partner sites better serve visitors and identify opportunities for future initiatives. University of Northern Iowa's STEP (Sustainable Tourism and Environmental Program) has been approached to conduct the study.

The objectives of the study are:

1. To identify trip characteristics of visitors to the SSNHA farms

2. To identify the demographic profile of visitors to the SSNHA farms
3. To assess the economic impact of visitors to the SSNHA farms
4. To assess marketing of SSNHA farms
5. To assess the level of satisfaction of visitors to the SSNHA farms

III. Methodology

With the purpose of addressing the above-mentioned research objectives, a questionnaire based survey has been designed (see Appendix 1).

In the first part of the questionnaire, visitors were asked for travel and trip characteristics, which included questions such as primary purpose of the trip, length of stay, travel party size, previous visits, and other places and sites they visited. In the second part, the visitors were asked how they planned their trip, including visitors planning process before they left, if they sought out information while they were traveling, how helpful was the information they had, and how familiar they were with SSNHA. In the third part of the questionnaire, they were asked about their spending patterns for lodging, restaurants, groceries, transportation, admissions and shopping and also about the level of satisfaction on services offered. In the fourth part of the questionnaire, some questions on visitors' demographic profile were included, such as age, income, gender, education level, and where they came from.

The visitors were intercepted at 6 farms partner sites (total number of partners at the time this study was initiated). Depending on the site, the surveys were handed out by students from the University of Northern Iowa-STEP or by partner site staff. Visitors intercepted included anyone who was visiting the site whether or not they were residents of the area. The intercept survey was initiated during the month of August 2003 and it continued through June 2004. This

time frame was selected to gather representative data of visitors traveling in different seasons. By the end of June 2004, 29 surveys were completed.

IV. Overall Survey Results

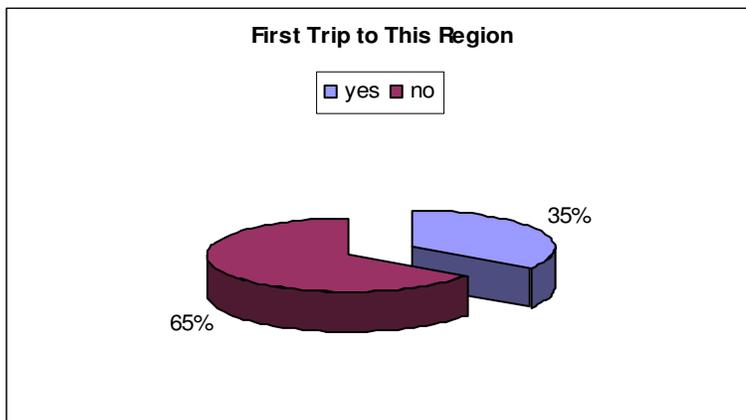
A. Trip Characteristics

Several questions were asked to determine the nature of the respondents' trip. Visitors were asked if they were a return visitor or first time visitor, what their primary purpose was for visiting, if they were traveling with an organized group or not, the size of their travel party and other places they were visiting in the area.

1. Previous Visits

Visitors were asked if they had ever visited the region before this trip.

Chart no. 1



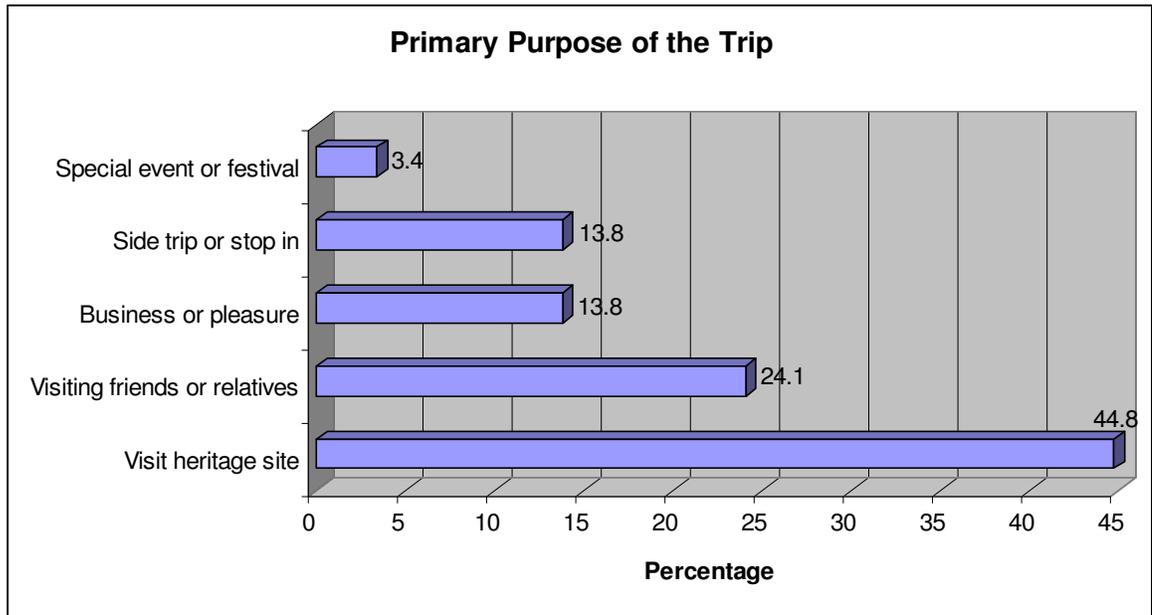
Source: UNI-STEP; 2003-2004 SSNHA Farms Visitor Study

Most of the visitors (n=29) who visited the SSNHA farms have been to the region before (chart no.1). Sixty-five percent said they had visited the region and 35% percent said they had never visited the region.

2. Primary Purpose of the Trip

Visitors were asked why they came to the region and on the questionnaire they had five different options from which to choose. These options included a festival or special event, a combined business/pleasure trip, to visit friends and/or family, a side trip on the way to another place, or to visit specifically the SSNHA farms.

Chart no. 2



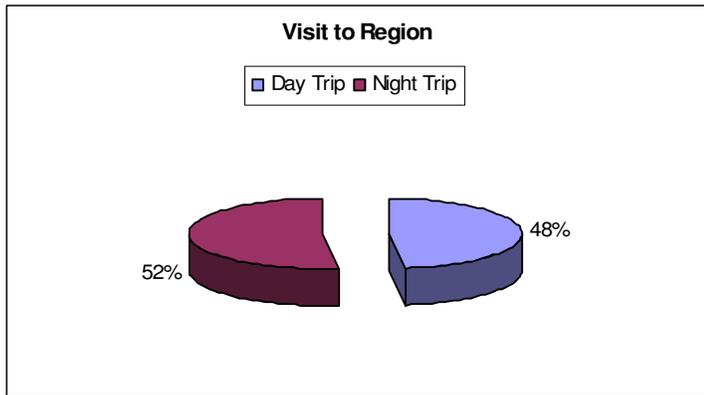
Source: UNI-STEP; 2003-2004 SSNHA Farms Visitor Study

Most of the visitors (44.8%) have as their primary purpose of their trip visiting this specific heritage site (chart no.2). Other reasons for visiting were visiting friends or relatives (24.1%), business or pleasure and a side-trip on the way to another location (13.8%).

3. Length of Stay

On the questionnaire, the question was asked as to what type of visit they were making to the region: a day or an overnight trip.

Chart no. 3

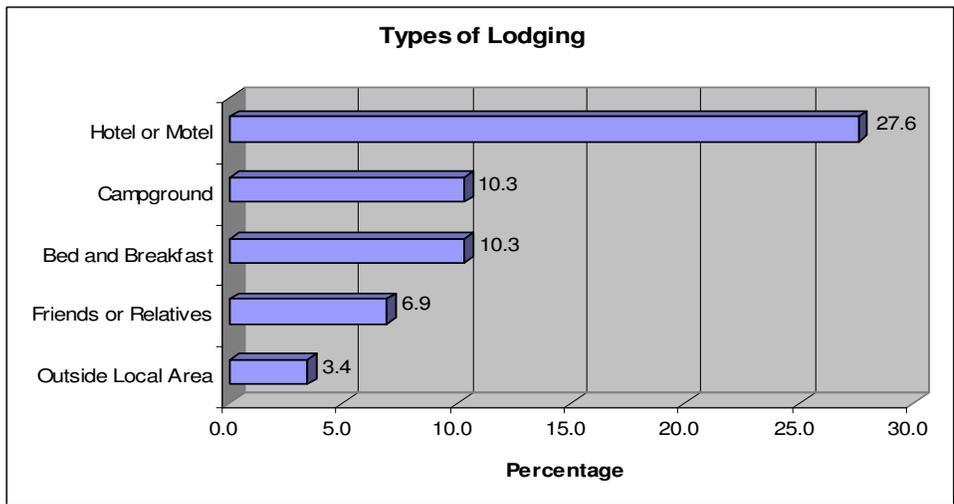


Source: UNI-STEP; 2003-2004 SSNHA Farms Visitor Study

The response to this question was nearly even with just over half (52%) of the visitors (n=29) responding they were on an overnight trip and 48% responding that they were on a day trip (chart no.3).

The visitors who stayed overnight (48% of the respondents) in the SSNHA farms were asked about the type of accommodation they were using. Five choices were provided, which included staying outside the area, with friends and/or relatives, at a campground, at a bed & breakfast, or at a hotel or motel.

Chart no. 4



Source: UNI-STEP; 2003-2004 SSNHA Farms Visitor Study

Most of the visitors (27.6%) stayed in a hotel or motel. Campgrounds and Bed and Breakfasts is where 10.3% of the visitors stay. Visitors also stayed with friends and relatives (6.9%).

4. Being in an Organized Group

The visitors were also asked if they were with an organized group or traveling by themselves.

Chart no.5



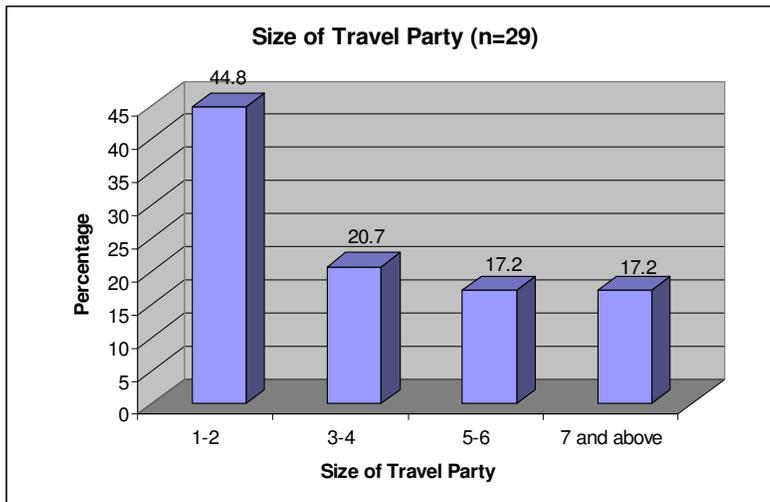
Source: UNI-STEP; 2003-2004 SSNHA Farms Visitor Study

The majority (80%) of visitors (n=29) were not traveling with an organized group. Visitors traveling with a group represented 17% of the respondents.

5. Travel party size

The survey included also a question that asked about the size of the party the visitors were traveling with.

Chart no. 6



Source: UNI-STEP; 2003-2004 SSNHA Farms Visitor Study

Most of the visitors were traveling alone or with one other person (44.8%). The next highest was a travel party size of three to four people (20.7%). Party sizes of five to six and seven and above made up the following 34.4% of survey participants.

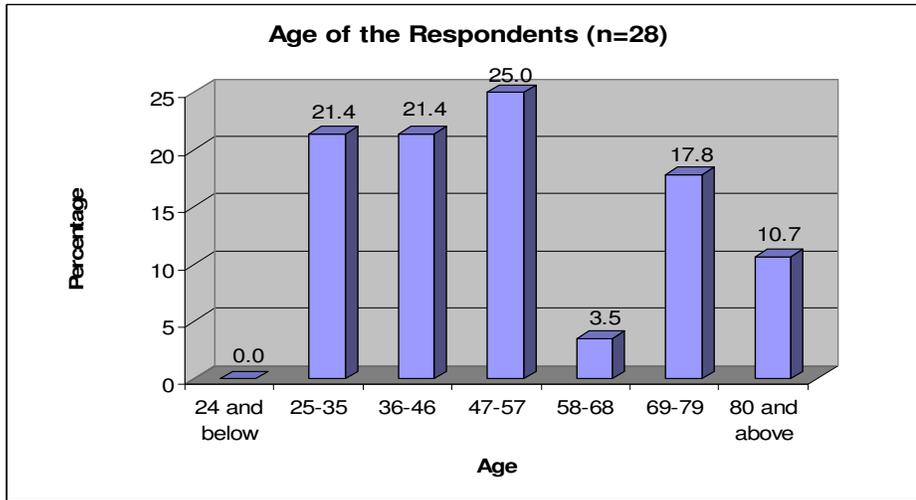
B. Visitor Demographic Profile

Several demographic questions were included at the end of the questionnaire. These included questions regarding age, gender, income and level of education.

1. Age

Visitors intercepted to participate in the questionnaire were asked their age. The results are shown in chart no 7.

Chart no. 7



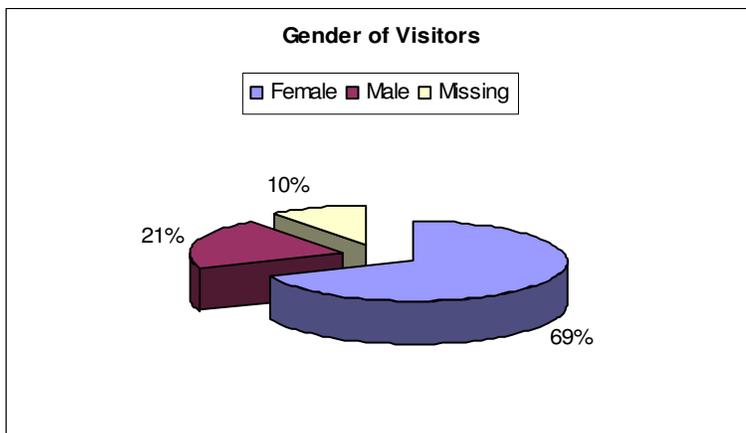
Source: UNI-STEP; 2003-2004 SSNHA Farms Visitor Study

The highest number of survey respondents that visited SSNHA farms was between the ages of 47 and 57 (25%). This category was closely followed by the age groups of 25 to 35 and 36 to 46 at 21.4% each. Visitors between the ages of 69 and 79 made up 17.8% of survey respondents. There were no respondents under the age of 24.

2. Gender

Chart no.8 shows the percentages of male and female respondents.

Chart no. 8



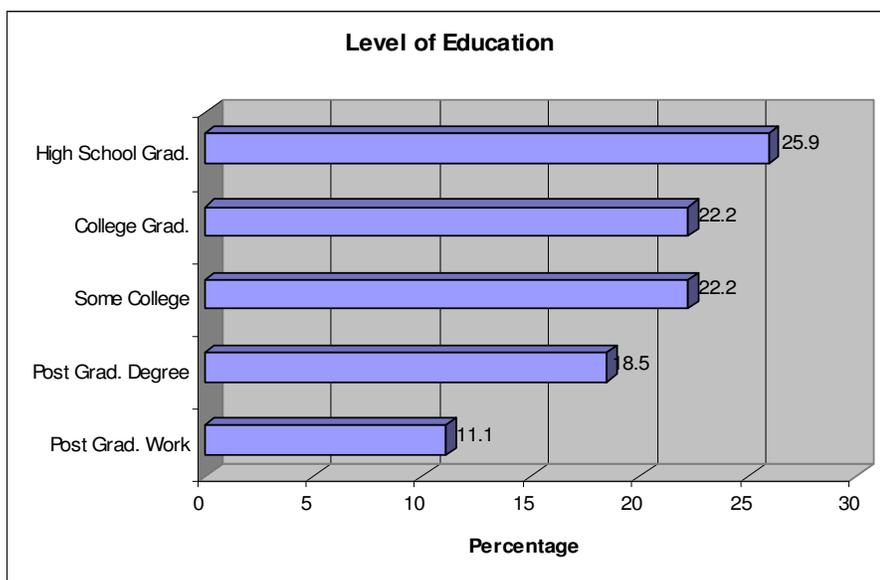
Source: UNI-STEP; 2003-2004 SSNHA Farms Visitor Study

The majority of the visitors (n=29) responding (69%) were females. Males represented 21% of the visitors' sample (chart 8).

4. Education Level

On the survey respondents were asked about their level of education. These categories ranged from some high school to a post-graduate degree.

Chart no. 9



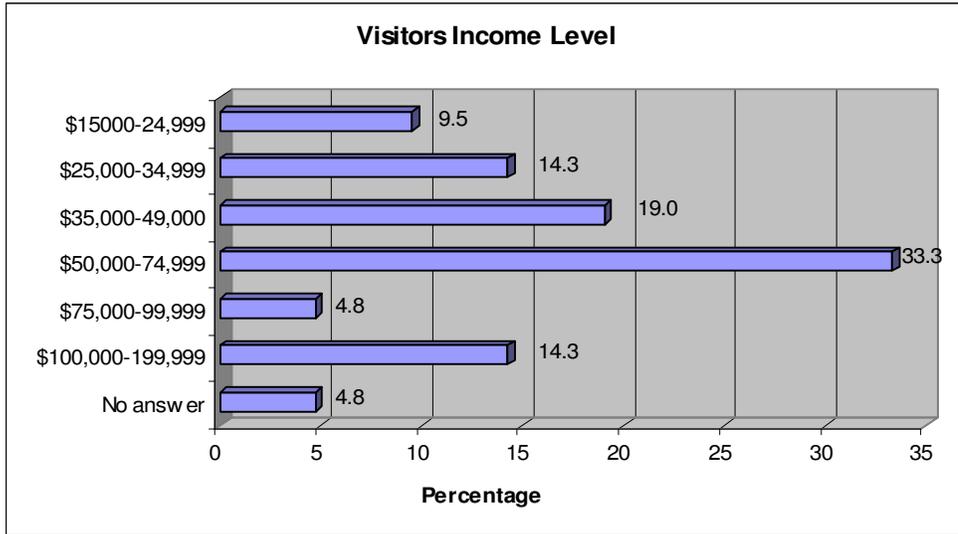
Source: UNI-STEP; 2003-2004 SSNHA Farms Visitor Study

One-fourth of the visitors (25.9%) were high school graduates. Almost half (44.4%) of visitors had either some college experience, or graduated from college, and 29.6% had done post graduate work or have a post graduate degree.

5. Income

Visitors were asked about their current income level.

Chart no. 10



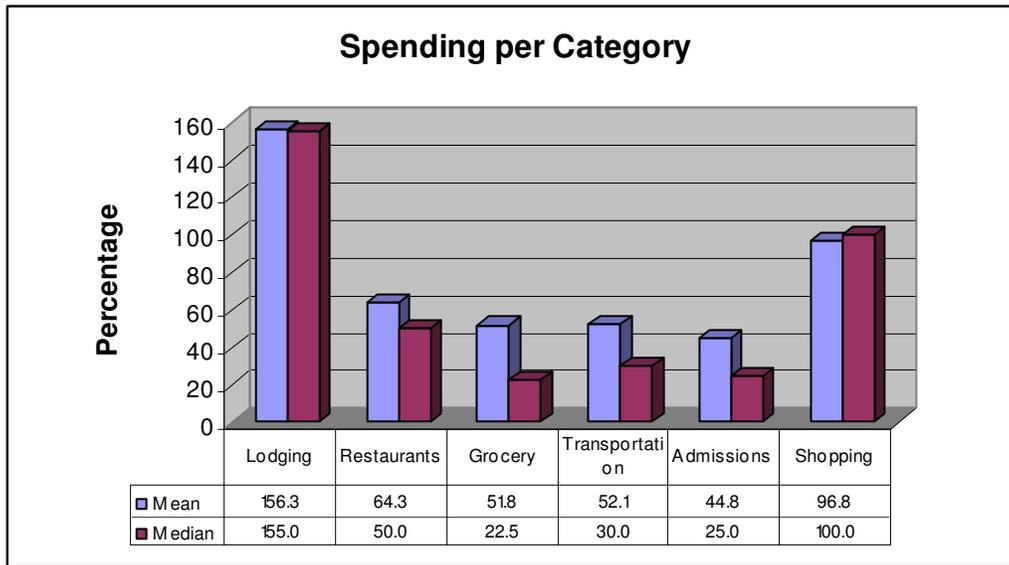
Source: UNI-STEP; 2003-2004 SSNHA Farms Visitor Study

Visitors' income ranging from \$50,000- \$74,999 represented the largest category (33.3%) and 19% of the visitors indicated their income level at \$35,000- \$49,999 (chart 10).

C. Spending Patterns

Visitors were asked about their total expenditures during their trip in the area. Expenditures were divided by category including shopping, admissions, transportation, grocery, restaurants, and lodging.

Chart no. 11



Source: UNI-STEP; 2003-2004 SSNHA Farms Visitor Study

Expenditures were highest in the lodging category with an average of \$155 for the trip. Shopping was the second largest expenditure with an average of \$100. Visitors spent more on lodging and shopping than transportation, restaurants, and groceries combined.

A t-test was run to see if there is statistical significance of spending between first time visitors and repeat visitors. The study shows that first time visitors spent less on lodging (M=90.50, SD=98.288) than repeat visitors (M=169.50, SD=98.219) but is not statistically significant at the .324 level [t(10) = -1.038]. The first time visitors spent less on restaurants M=54.29, SD=52.870, than repeat visitors (M=68.00, SD=46.030), but is not statistically significant at the .523 level [t (24) = -.648]. They (M=38.00, SD=34.928) spent also less on transportation than repeat visitors (M=60.00, SD=59.529), but is not statistically significant at the .468 level [t(120) = -.750]. Also they (M=65.0, SD 49.497) spent less as well as on shopping than repeat visitors (M=103.9, SD 69.1) but is not statistically significant at the .478 level [t(9) =

-.740]. But, they indeed spent statistically significantly less on grocery and bar meals ($M=12.50$, $SD=3.536$), than repeat visitors ($M=59.70$, $SD=55.064$), at .024 level [$t(9.339) = -2.683$].

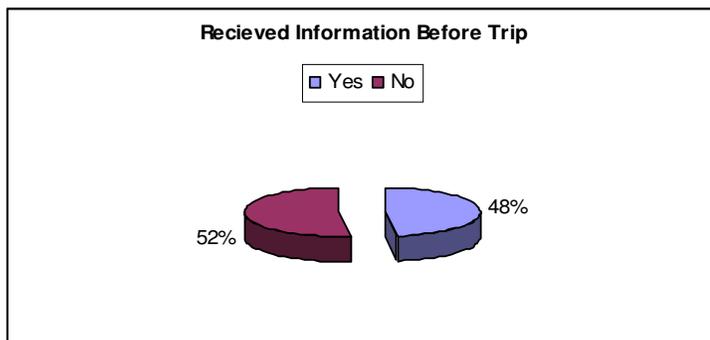
D. Trip Planning and Information Seeking

Visitors were asked questions about the types of information they received before and during their trip. They were asked if they received information prior to their trip and if so what type of information, what was their source of information while they were on the trip, how helpful was the information they received, and how familiar were they with the Silos and Smokestacks National Heritage Area.

1. Information Used for Planning Trip

The survey asked if visitors had received any travel information when planning their trip.

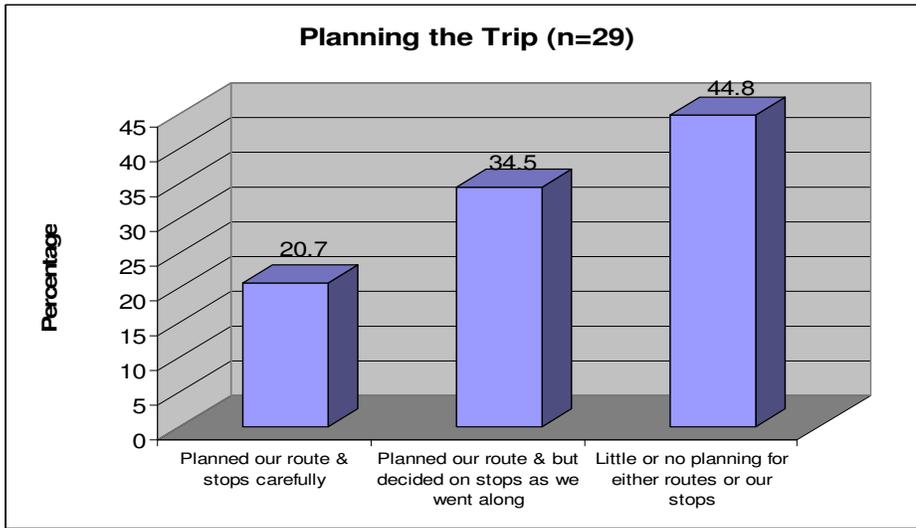
Chart no. 12



Source: UNI-STEP; 2003-2004 SSNHA Farms Visitor Study

Visitors were also asked how much they planned their trip prior to leaving. The choices provided were they planned routes and stops carefully, they planned the route and decided on stops while traveling or they did little planning before they left.

Chart no. 13

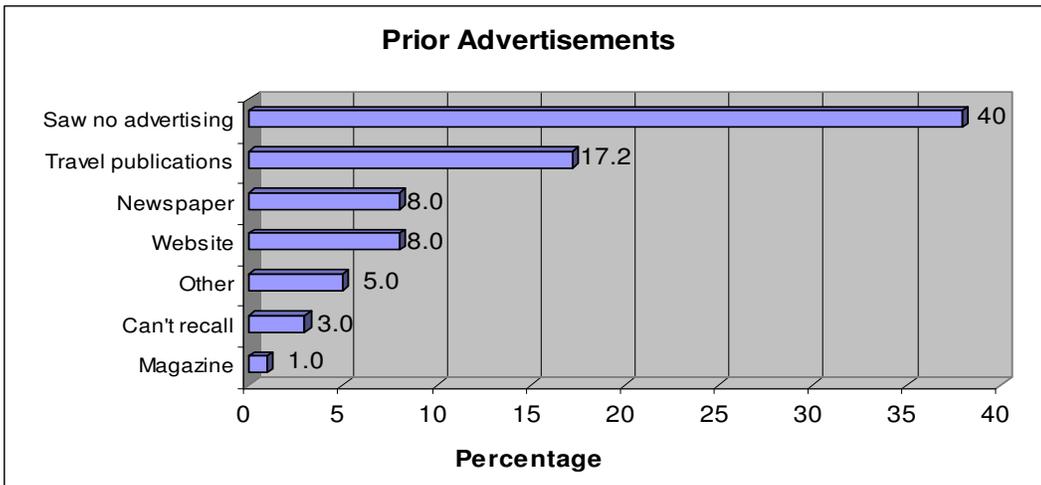


Source: UNI-STEP; 2003-2004 SSNHA Farms Visitor Study

Some of the visitors (44.8%) had little or no planning while 34.5% planned their route but decided on stops while traveling. Those who planned their routes and stops carefully represented 20.7% of the respondents.

The visitors were asked if they saw any advertisements before they came to the region and if they did see any advertisements where did they see them.

Chart no. 14



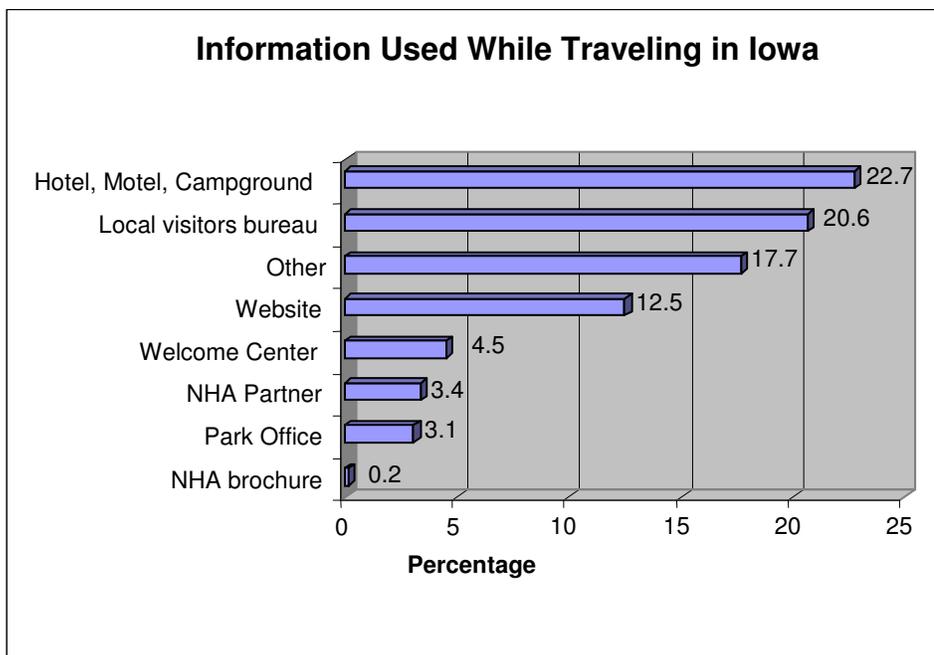
Source: UNI-STEP; 2003-2004 SSNHA Farms Visitor Study

The highest percentage of visitors (40%) saw no advertising. Travel publications were the most commonly used form of advertisement at 17.2%. Newspapers (8.0%), websites (8.0%), and magazines (1.0%) were not used as often.

2. Source of Information While Traveling

Visitors were asked where they received information while in Iowa.

Chart no. 15



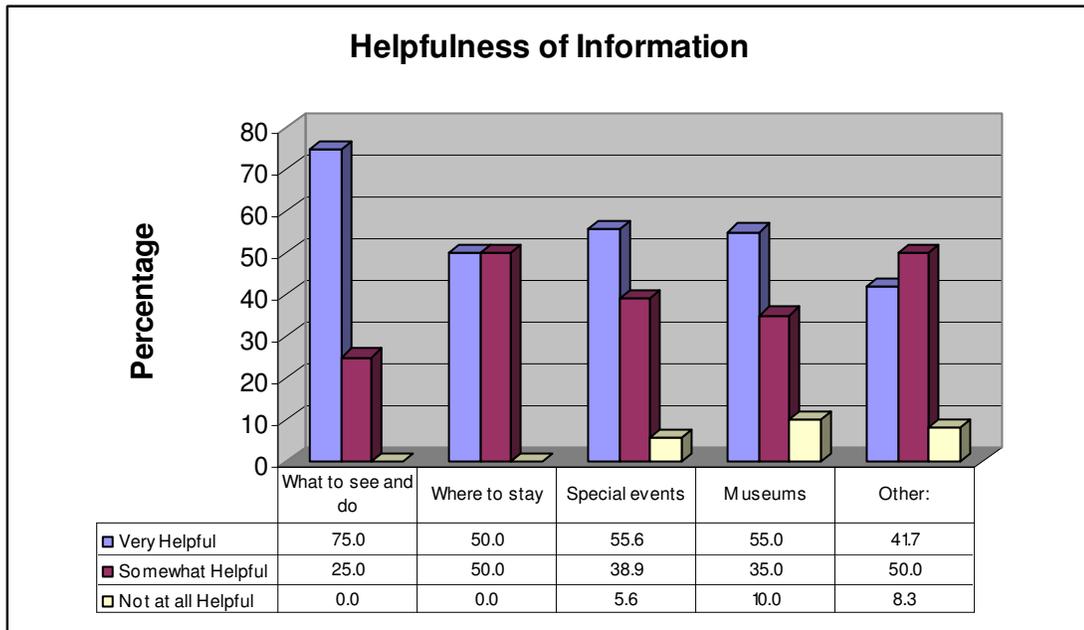
Source: UNI-STEP; 2003-2004 SSNHA Farms Visitor Study

Visitors tended to rely on their place of lodging (22.7%) or the local visitors bureau (20.6%) for information.

3. Helpfulness of Information

Visitors were asked to rate the helpfulness of the information they received.

Chart no. 16



Source: UNI-STEP; 2003-2004 SSNHA Farms Visitor Study

Visitors generally found the information on what to see and do most helpful (chart 16). Most of the visitors (75%) found the information as very helpful for what to see and to do, 55.6% for information on special events or festivals and 55% for the information on museums.

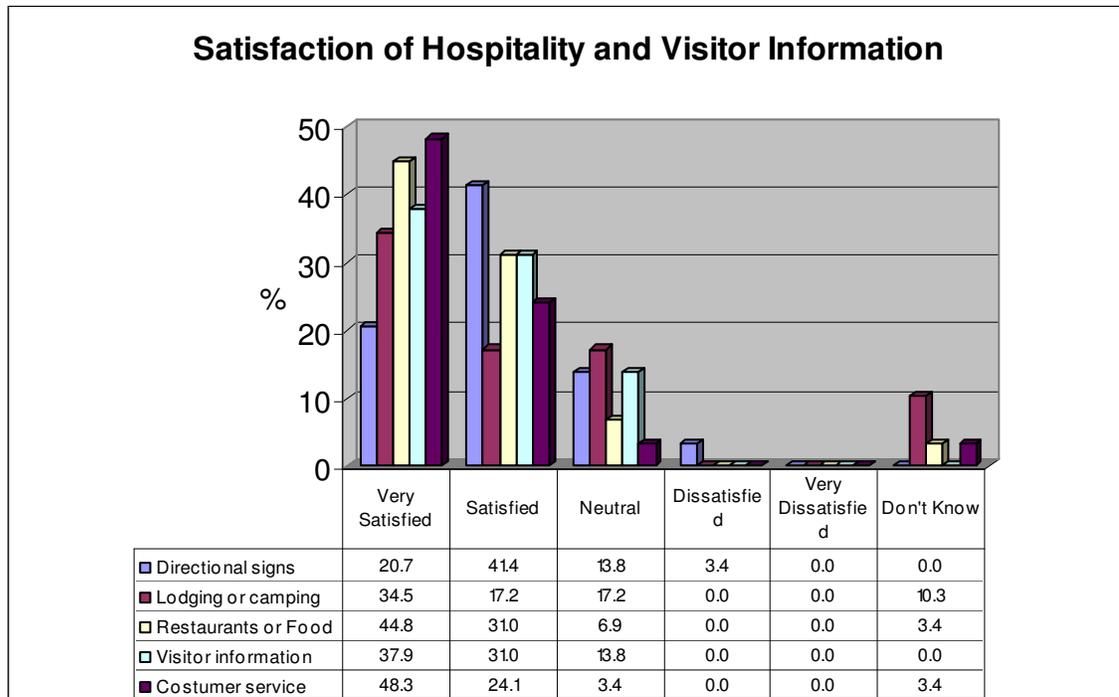
E. Visitor Satisfaction

Visitors responded to questions regarding how satisfied they were with the region. This section included different choices from three general categories. These categories included hospitality and visitor information, cultural and historical attractions and things to do/activities.

1. Satisfaction with Hospitality & Visitor Information

This category combined five different types of services that visitors would be likely to encounter in the region. These services included restaurants and food, customer service, lodging or camping, visitor information, and directional signage.

Chart no. 17



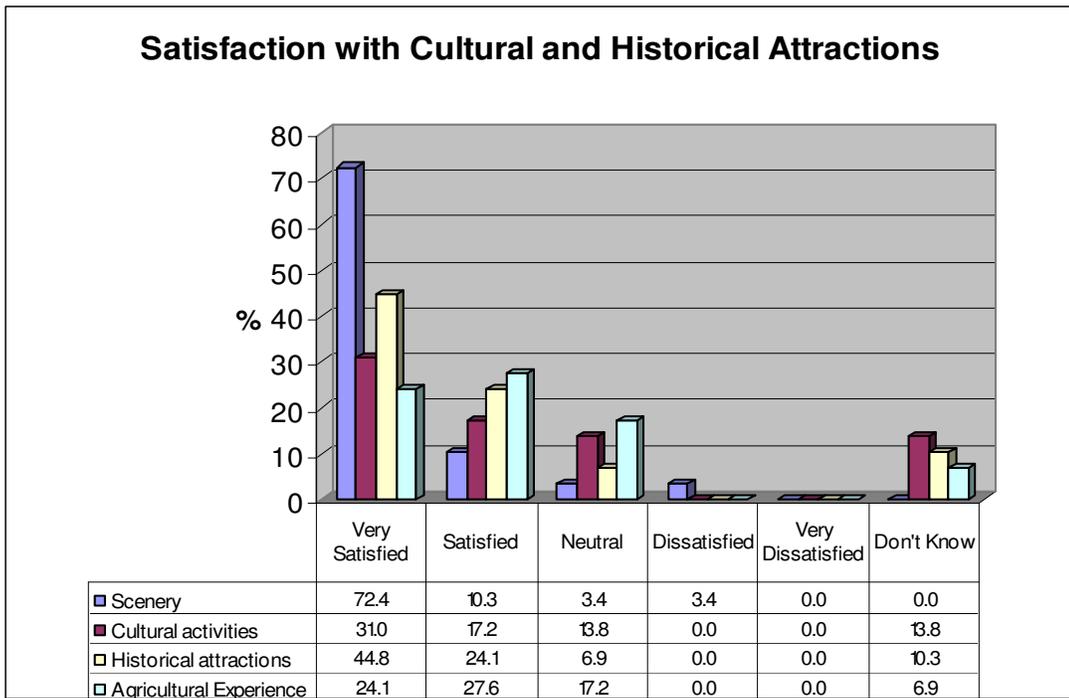
Source: UNI-STEP; 2003-2004 SSNHA Farms Visitor Study

Most of the visitors were very satisfied or satisfied with hospitality and visitor information. In particular, visitors were very satisfied with customer service (48.3%), with restaurants and food (44.8%) and satisfied with directional signs (41.4%).

2. Cultural/Historical Attractions

This category included four aspects of cultural and historical attractions within the region. These consisted of cultural activities and events, historical attractions, agricultural activities/experiences, and scenery.

Chart no. 18



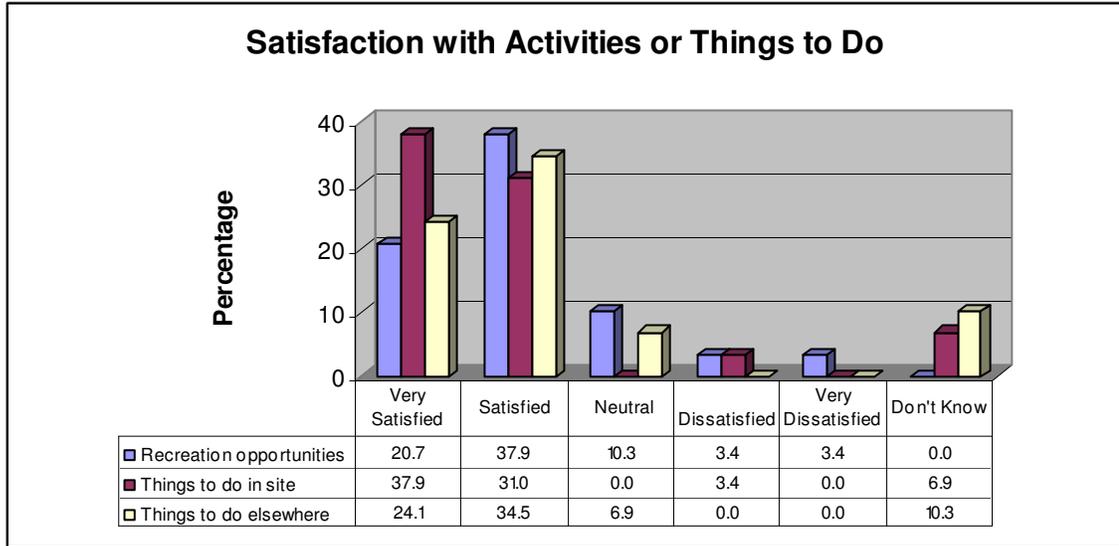
Source: UNI-STEP; 2003-2004 SSNHA Farms Visitor Study

The majority of visitors (72.4%) were very satisfied with the scenery while traveling in Iowa. Half of the respondents (51.7%) were either satisfied or very satisfied with the agricultural experience while on their trip.

3. Activities/Things to Do

This category included three things to do while visiting the region and the state of Iowa. The choices to respond to were recreational opportunities, things to do in the heritage area, and things to do elsewhere in Iowa.

Chart no. 19



Source: UNI-STEP; 2003-2004 SSNHA Farms Visitor Study

Visitors were either very satisfied or satisfied with activities or things to do in the area. Particularly, they were very satisfied with things to do in the area (37.9%) and satisfied with recreation opportunities (37.9%).

Conclusions

A. Trip Characteristics

The SSNHA relies on repeat visitors. Most of the trips (65%) are not first time trips. The primary purpose of the trip for most of the visitors (44.8%) was specifically to visit the heritage site. Another reason for traveling included visiting friends/family (24.1%). Over half of the visitors (52%) stayed overnight while 48% decided to make it a day trip. Of the visitors who stayed overnight, 27.6% stayed in a hotel or motel while 10.3% of visitors stayed in campgrounds and bed and breakfast. The majority of visitors (44.8%) traveled alone or with one other person.

B. Visitors Demographic Profile

A high majority (67.8%) of visitors to the SSNHA farms were between the ages of 25 and 57. The majority of visitors (74%) went to college, of which 18.5% have received their post graduate degree. The largest group of visitors (33.3%) had an income ranging from \$50,000 to \$74,999. The median household income in Iowa is \$39,469.

C. Spending Patterns

Lodging was the highest expenditure category with an average spending of \$155 for the trip, followed by shopping (\$100) and restaurants (\$50). Visitors spent more in lodging and

shopping that transportation, restaurants, and groceries combined. First time visitors spent significantly more than repeat visitors.

D. Trip Planning and Information Seeking

A majority of the visitors (44.8%) did little or no planning for their routes or stops before their trip. The remaining 55.2% of survey participants either planned their trip and stops carefully or planned their route but decided on stops as they traveled. In addition, 40% of the visitors did not see any advertisements for the region before they visited. While they were in Iowa, the most common place to receive information was at the place of accommodation (22.7%), followed by local visitor bureaus (20.6%). Those that received information thought the information was very helpful, particularly with regard to identifying things to see and do.

E. Visitor Satisfaction

Generally visitors were satisfied or very satisfied with the hospitality, visitor services, attractions and things to do in the region. There was high level of satisfaction expressed for cultural activities (48.2%) and historical attractions (82.3%). Scenery was an aspect with which visitors expressed a high level of satisfaction (72.4%).

Appendix 1
Silos & Smokestacks National Heritage Area Tourism Study

Please take a few moments to fill out this questionnaire. The Silos & Smokestacks National Heritage Areas (NHA) is studying our visitors in order to make their experiences here in our communities more enjoyable. We thank you for your assistance. If you have a question, please call: Candy Streed, Program & Marketing Director at (319) 234-4567 or by email at cstreed@silosandsmokestacks.org

1. Is this your first trip to this region? (See Map)
Yes
No, if no how many other trips have you taken to this region in 2002-2003? _____ (# of trips)

2. What is the primary purpose of this trip? (Check one)
Specifically to visit this heritage site
This heritage site was a side trip or stop on a trip to another primary destination
Visiting friends or relatives
Business or combined business/pleasure trip
Special event or festival

3. Is your visit to the region part of a: Day trip or Overnight trip

If an overnight trip, what type of lodging are you using or do you plan to use in the local area?
Hotel or motel
B & B
Campground
Staying with friends or relatives in the area
Staying overnight outside the local area or just passing through

4. How long have you spent, so far, in the local area?
_____ hours if on a day trip
_____ nights if an overnight trip

5. How much longer do you plan on staying in the local area?
_____ hours if on a day trip
_____ nights in an overnight trip

6. Did you travel to this region as part of an organized group tour?
Yes No

7. The total number of people (including yourself) in your immediate traveling party is: _____ people

8. Did you receive any travel information from this region before you left for this trip?
Yes No

9. How much did you plan this trip **before** you left home?
Planned our routes and stops carefully
Planned our route, but decided on stops as we went along
Little or no planning for either our route or our stops

10. Prior to your trip did you see any advertisements for travel to this region?

- I saw no advertising
- I saw advertising, but I can't recall where
- Travel publications Magazine (List if possible) _____
- Website Other medium (Please describe) _____
- Newspaper

11. While traveling **within** Iowa, what local source of information for travelers did you use? (*Check all that apply*)

- Hotel, motel, campground or other accommodation Website (which one: _____)
- National Heritage Area Partner Site Federal or state park office
- Local visitor bureau or chamber of commerce office Other (please describe) _____
- National Heritage Area Brochure
- State-operated Welcome Center (which one: _____)

12. How helpful was the information you received for planning and possibly taking a trip to this region? (*Circle one response for each item*)

	Very Helpful	Somewhat Helpful	Not at all Helpful
What to see and do	1	2	3
Where to stay	1	2	3
Special events/festivals	1	2	3
Museums	1	2	3
Other:	1	2	3

13. Are you familiar with the Silos & Smokestacks National Heritage Area?

- Very familiar
- Somewhat familiar
- Unfamiliar
- Not Sure

14. What communities, site, and/or attractions have you visited or do you plan to visit during your stay in this area? (*Please List*)

15. How much money do you and other members of your travel party plan to spend on your trip? Include the amount of money spent so far and money you intend to spend. Report all spending **within the Northeast Iowa region**. (See Map) (*Enter spending to the nearest dollar in each category below. Leave space blank if you spent nothing in a category.*)

Spending categories:

Spending in Northeast Iowa

- Lodging (Hotel, Motel, Campground, Cabin) \$ _____
- Restaurant and bar meals and drinks \$ _____
- Grocery/Convenience store food and drink \$ _____
- Other Transportation expenses \$ _____
- Admissions (recreation and entertainment) \$ _____
- Shopping (e.g., souvenirs, film, clothes) \$ _____

16. How many people in your travel party do these expenses cover? _____

17. How would you rate the region with respect to each of the following:
(check one response for each item)

	Very Satisfied	Satisfied	Neutral	Dissatisfied	Very Dissatisfied	Don't Know
Recreation opportunities						
Directional signs						
Lodging or camping						
Restaurants and Food						
Scenery						
Things to do in the Heritage Area						
Things to do elsewhere in Iowa						
Cultural activities or events						
Historical attractions						
Agricultural activities/experiences						
Visitor information						
Customer Service						

About You

18. Where do you live? City _____ State _____ Country _____
Postal or zip code _____

19. You are: _____ years old Are you? ___ Female ___ Male

20. What level of education have you completed? (Select one)
 Some High School Some College Post Graduate Work Technical School
 High School Graduate College Graduate Post Graduate Degree Other _____

21. Which statement best describes your total 2002 annual household income (from all sources and before taxes)? (*Check one*)

Less than \$9,999	\$25,000-34,999	\$75,000-99,999	\$200,000 and above
\$10,000-14,999	\$35,000-49,999	\$100,000-149,999	Choose not to answer
\$15,000-24,999	\$50,000-74,999	\$150,000-199,999	

22. And finally, please write any further comments you might have about your trip to this site, please include your opinion on strengths and weakness of the region:

THANK YOU VERY MUCH FOR YOUR INFORMATION!