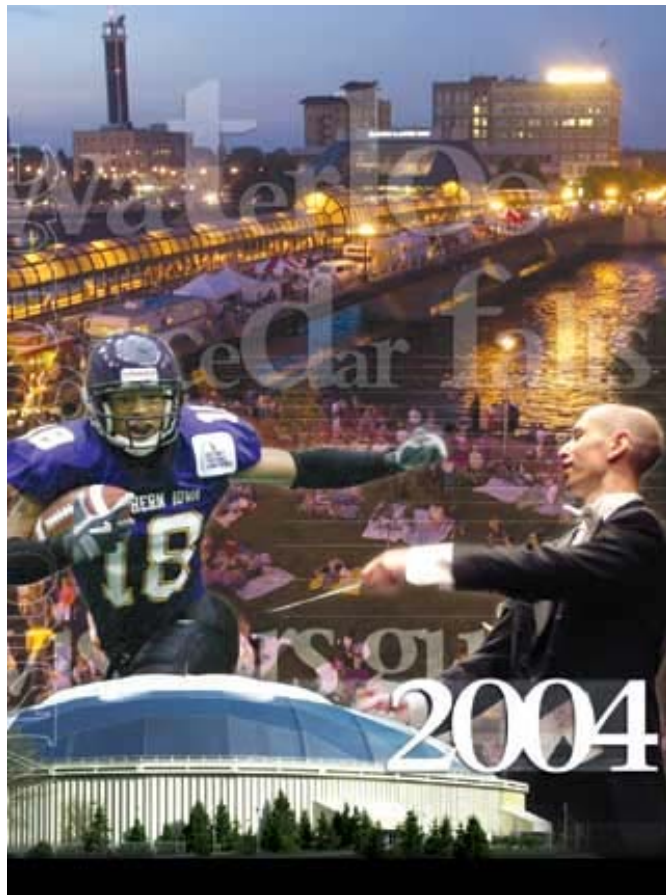


Waterloo/Cedar Falls Tourism Advertisement Conversion Study 2003-2004



Intercept Survey Report
Prepared by: UNI - STEP

**Waterloo/Cedar Falls Tourism
Advertisement Conversion Study
Intercept Survey Report
2003-2004**

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Waterloo/Cedar Falls Intercept Survey Report

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I. Introduction

Many communities are developing their visitor services as part of a regional and local economic development strategy. In developing these services, it is important to understand the travel characteristics of current visitors. To date visitor data collected in Iowa has typically not been place specific. The Cedar Falls Tourism and Visitor Office and the Waterloo Convention and Visitors Bureau approached the University of Northern Iowa STEP (Sustainable Tourism and the Environment Program) to collect visitor data specific to the Cedar Valley. This study is an effort to better understand current visitors and improve services.

Another important area that this study will address is the most effective way to use advertising dollars. The Cedar Falls and Waterloo offices currently share marketing costs involved with their cooperative advertising efforts. Their primary advertising outlets include magazine, website, newspaper, travel publications, etc. This study will examine each of these in order to determine what the most effective uses of the marketing dollars would be.

II. Purpose of Study

This study includes an analysis of travel motivations, characteristics, and patterns of current visitors to the Cedar Valley area. The methods that were used in this study were secondary data analysis of potential and existing tourism resources, and primary data collection using both intercept surveys and mail surveys. Through the data that was

collected and analyzed the Waterloo and Cedar Falls tourism offices will gain a better understanding of their current visitors, understand how and where to most effectively advertise, and ways to improve visitor's experiences when traveling to the Cedar Valley.

A. Goals and Objectives

The goal of this research is to evaluate the response to current tourism marketing and promotion strategies and to develop a profile of visitors to the Cedar Valley. Another objective of this research is to identify existing travelers using standardized tourist market segmentation methods. Next, the study identifies traveler preferences and traveler motivations, specifically related to the Cedar Valley. The data collected will also be used to recommend promotional plans and marketing strategies. In summary, this research will allow these two tourism offices to gain valuable information to assist them in sustaining and growing the tourism industry in the area.

III. Methodology

The methodology for this research utilized a number of techniques. The first method that was used were mail surveys, which were sent to a group of randomly selected individuals who had recently requested information from either the Waterloo or Cedar Falls tourism offices. The mail surveys were numbered solely for the purpose of tracking those who had responded. This allowed researchers to then follow up with non-respondents to ensure quality response rates for the data analysis.

The next method of data collection used intercept surveys, which were collected at a variety of locations and events in Waterloo and Cedar Falls. The locations and

events included sporting events, theatre, community festivals, museums, and others. Surveyors would go to these locations and ask those in attendance if they were from either Waterloo or Cedar Falls. If they were not, they were asked to take a few moments to fill out a visitor questionnaire regarding their trip.

Each of these data collection methods provided the research team with an abundant amount of information to analyze and report. For this reason the project has been split into two separate, but related, reports. This report will focus on the intercept surveys, their results, and implications, while a separate report, which accompanies this report, will focus on the mail out surveys.

IV. Survey Results

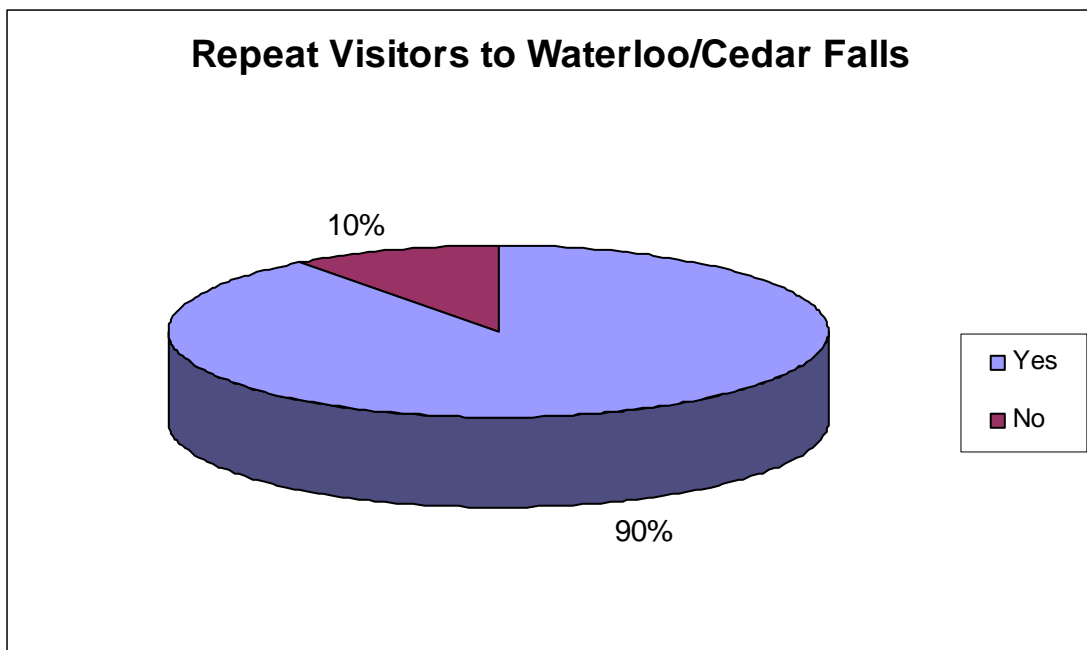
A. Travel and Trip Characteristics

Travel and trip characteristics discuss the many aspects of the visitors' trips to the Cedar Valley. It tells previous visit patterns, why visitors are coming to the Cedar Valley, what their major destination is on their trip, what mode of transportation they used to get here, who they are traveling with, and how long they are staying.

a. Previous Visits

Visitors were asked if they had ever been to Waterloo/Cedar Falls before this trip to see how many repeat visitors are coming to the Cedar Valley.

Chart 1: Repeat Visitors to Waterloo/Cedar Falls

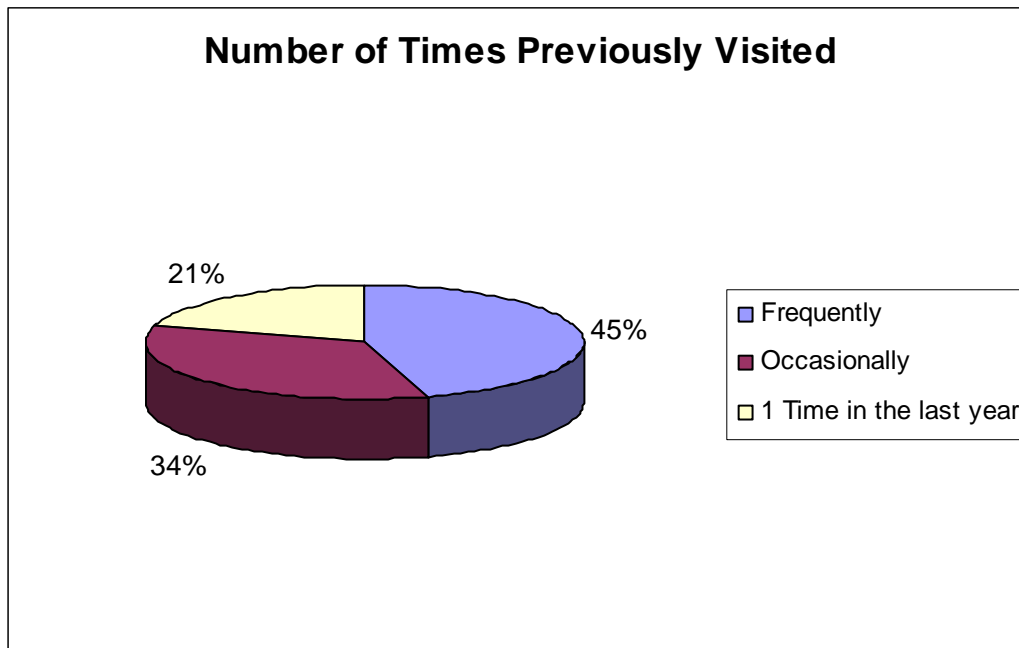


Source: Waterloo/Cedar Falls Intercept Survey-2003-2004 UNI-STEP

A vast majority of the visitors to Waterloo/Cedar Falls have previously been to the area before. Specifically 90% of the visitors have been to the Cedar Valley before this trip.

The visitors who said they had been to the Cedar Valley before were then asked how often they visited the Cedar Valley. They could respond with frequently, occasionally, or one other time in the last year.

Chart 2: Number of Times Previously Visited



Source: Waterloo/Cedar Falls Intercept Survey-2003-2004 UNI-STEP

Nearly half (45%) of the previous visitors said they have visited the area frequently. Thirty-four percent said they had been to Waterloo/Cedar Falls occasionally, while a little over 21% said they had only been to the Cedar Valley once in the last year.

b. Purpose of Visit

Visitors were asked what their primary purpose for visiting the Cedar Valley during their visit. Under the business and pleasure categories they could pick which item or items were the main reasons for their visit. This chart shows all possible categories and the percentage of visitors who said it was their main reason for coming. Please note, visitors could chose more than one reason for visiting the area.

Table 1: Primary Purpose of Visit

Visiting friends/relatives	36.3%
Community Festival	26.5%
Sporting event	18.8%
Other	12.1%
Other Business	11.9%
Shopping	8.1%
Dining	7.3%
Cattle Congress	6.3%
Performing arts	5.2%
Golf	5%
Attend trade show	4%
Recreation Trails	4%
Camping	4%
Ag Tour	3.6%
Museums/Galleries	3.3%
University business	2.7%
Business conference	2.1%
Boating	1.5%
Antique shopping	1.3%
Hunting/fishing	1%
Corporate business meeting	0.4%

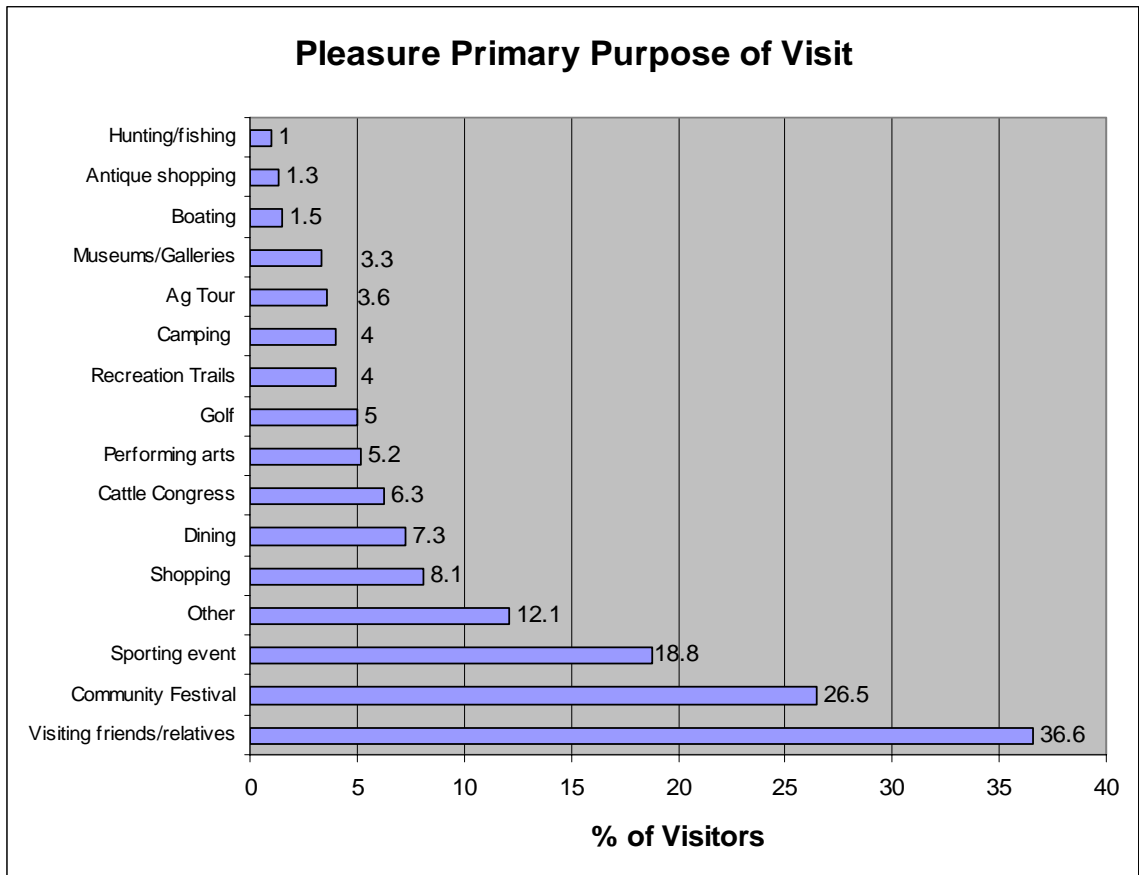
Source: Waterloo/Cedar Falls Intercept Survey-2003-2004 UNI-STEP

Visiting friends and/or relatives was the top reason for coming to the area (36%). Attending a community festival was the second highest purpose of visit (26.5%). Community festival might have been this high because a large number of surveys were collected at My Waterloo Days and Sturgis Falls. The top business category response was other business with almost 12% of visitors.

Pleasure Travelers

For those visitors whose primary purpose of travel was pleasure, the following chart indicates those activities.

Chart 3: Pleasure Primary Purpose of Visit



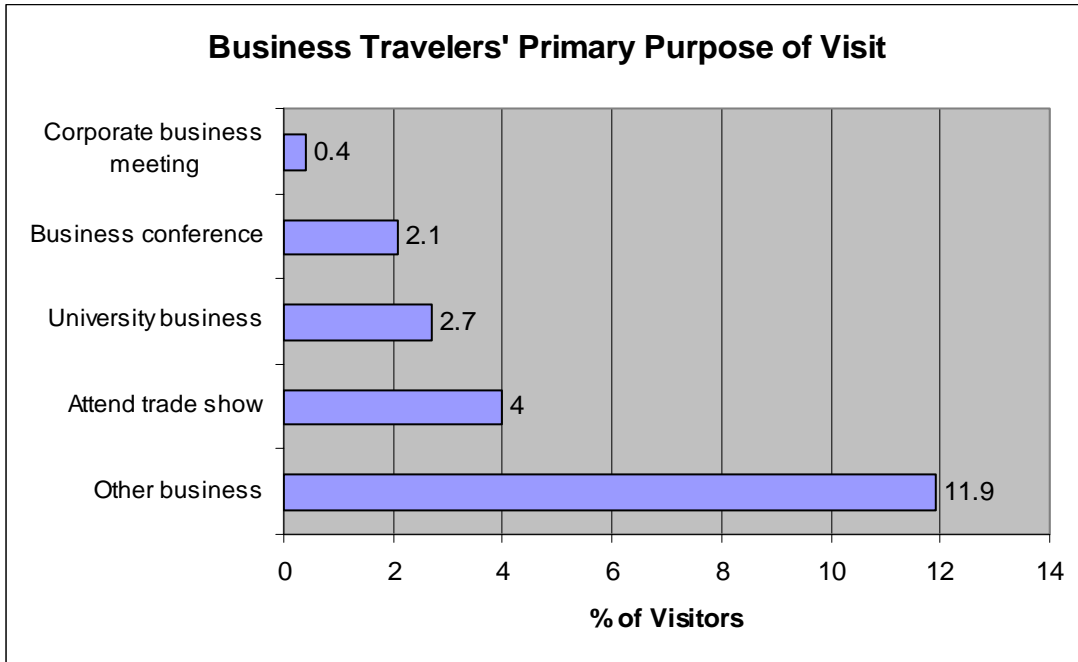
Source: Waterloo/Cedar Falls Intercept Survey-2003-2004 UNI-STEP

For pleasure travelers the three highest reasons for visiting the area were to visit friends and/or relatives (36.6%), to attend a community festival (26.5%), or to attend a sporting event (18.8%).

Business Travelers

Chart 4 shows the primary purpose of business travelers to the area.

Chart 4: Business Travelers' Primary Purpose of Visit



Source: Waterloo/Cedar Falls Intercept Survey-2003-2004 UNI STEP

The primary purpose for business travelers was for “other” business with 11.9%. The following are the visitors responses to other business; University of Northern Iowa basketball game, discount bread store, eating out, art shows, art interest, constitutional meeting, wrestling meet, Renaissance Fair, musician, parade, work, car show, visit family, pleasure, POW-WOW, rugby, craft show, learning about programs and opportunities for transferring to the University of Northern Iowa, college visit, University of Northern Iowa football game, University of Northern Iowa homecoming, girlfriend, sightseeing, birthday party, dancing, Polka Festival, High School Football Championships, lawn cake, and Sturgis Falls. The next highest category was to attend a trade show with 4%.

c. Major Destination

Visitors were asked where their major destination was in Iowa. Many visitors responded with Cedar Falls or Waterloo as their destination, but there were some other cities and attractions mentioned.

The other cities included; Dike, Arlington, Des Moines, New Hampton, La Porte City, Dyersville, Oelwein, Independence, Cedar Rapids, Denver, Washburn, Parkersburg, Waukon, Maquoketa, Minnetonka, Dubuque, Waverly, Charles City, Manning, Earlville, Iowa Falls, and Iowa City. Two visitors said their major destination was Dayton, Ohio and Washington, DC.

The major reasons visitors came were to see family, for a parade, for a dance, for pleasure, for work, to see bands, for a fair, to visit a friend, and to go shopping. Visitors said certain places were their major destination on their trip. These places are listed below.

***Festivals/Fairs**

- My Waterloo Days
 - Renaissance Fair
 - 4th Street Cruise
- Sturgis Falls
- Polka Festival
- Cattle Congress

***University of Northern Iowa Attractions**

- University of Northern Iowa
- University of Northern Iowa Dome
- Craft Show in the Dome
- University of Northern Iowa Football
- Gallagher-Bluedorn Performing Arts Center
- State Football Playoffs
- Boat Show in the Dome
- Farm show in the Dome
- University of Northern Iowa Basketball
- Wrestling Meet in the Dome

***Local Attractions**

- John Deere Operations
- Electric Park
- Lost Island Waterpark
- George Wyth State Park
- Hearst Center for the Arts
- Museum

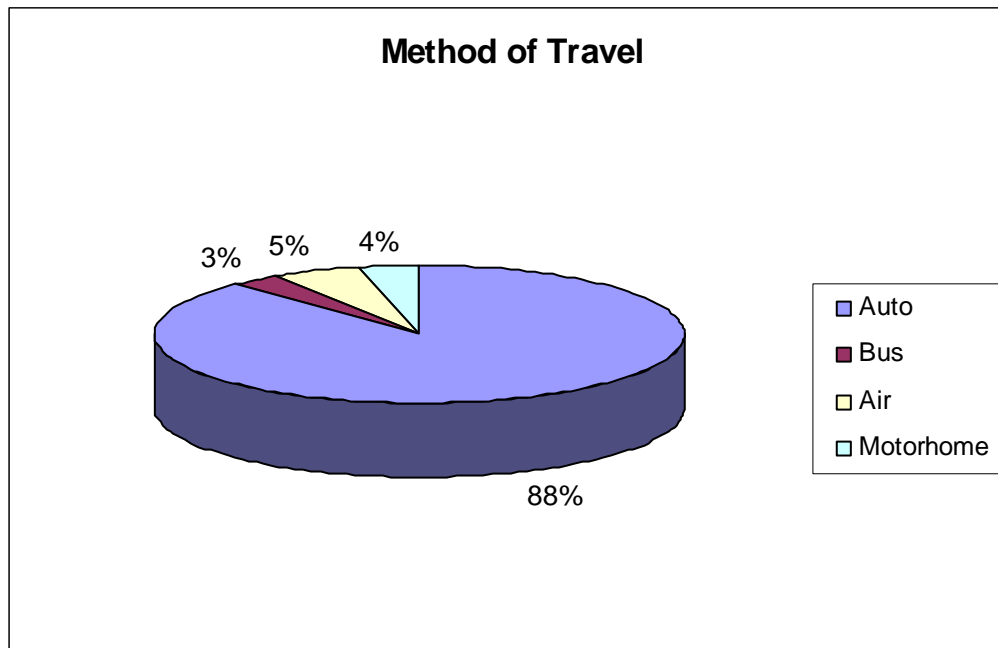
***Miscellaneous Places**

- Highway 20
- Dixieland
- Mall
- Target
- Hawkeye Community College
- The Other Place
- Monster Truck Rally
- The Waterloo Open

d. Method of Travel

Visitors were asked how they got to the Cedar Valley either by auto, bus, air, or motor home.

Chart 5: Method of Travel



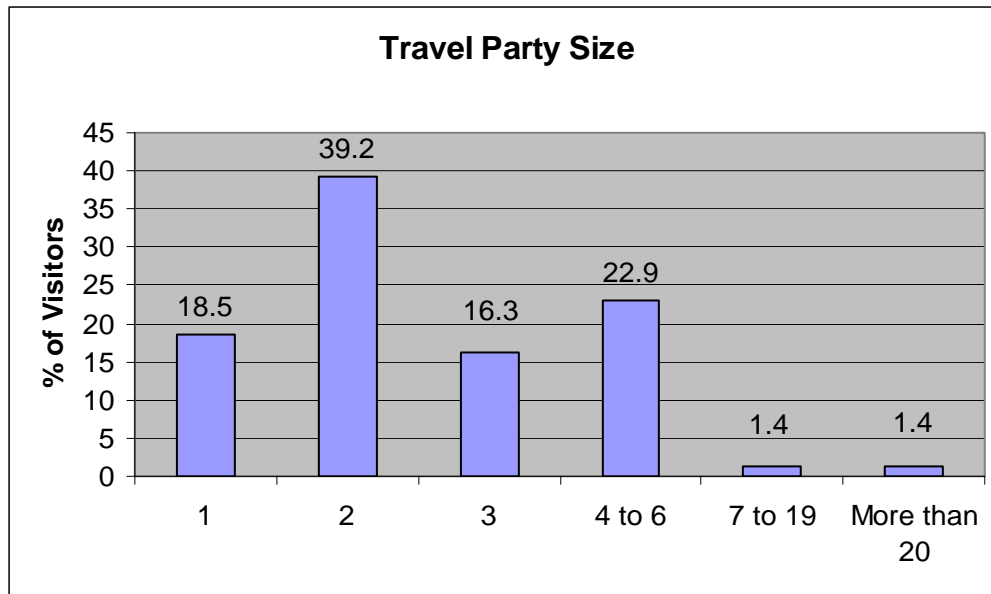
Source: Waterloo/Cedar Falls Intercept Survey-2003-2004 UNI-STEP

An overwhelming majority of the visitors said they got to the Cedar Valley by car (88%). The other three methods all had about the same percentages, air had 5%, motor home had 4%, and bus had 3%.

e. Travel Party Characteristics

Visitors were asked what the size of their travel party was. The travel party size is important to know when looking at visitors to the area because it shows what type of people are visiting including families, couples, or individuals.

Chart 6: Travel Party Size



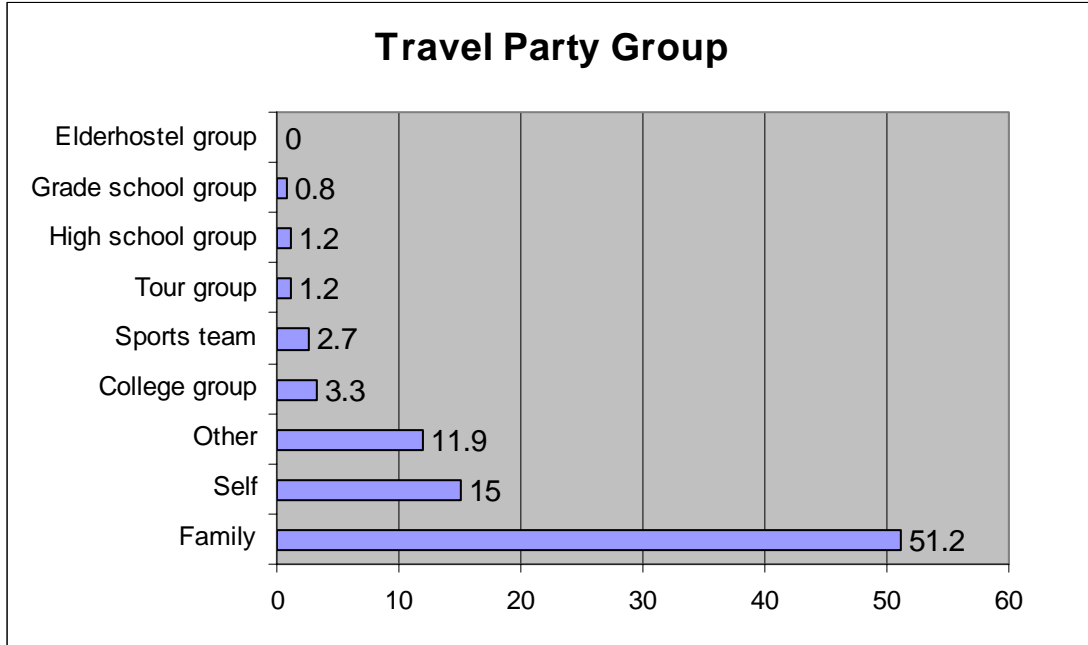
Source: Waterloo/Cedar Falls Intercept Survey-2003-2004 UNI-STEP

Nearly 40% of the visitors were traveling with 2 people. About 23% of the visitors had a travel party size of 4 to 6 people.

As a comparison, the Iowa Welcome Centers collected data from visitors from January-December of 2003. In their study they report the average travel party size is 2.5, however data collected for the Waterloo/Cedar Falls study suggests an average travel party size of 3.1 persons.

Visitors were asked who they were traveling with on this trip to Waterloo/Cedar Falls (whether that is themselves, family, or organized group).

Chart 7: Travel Party Group



Source: Waterloo/Cedar Falls Intercept Survey-2003-2004 UNI-STEP

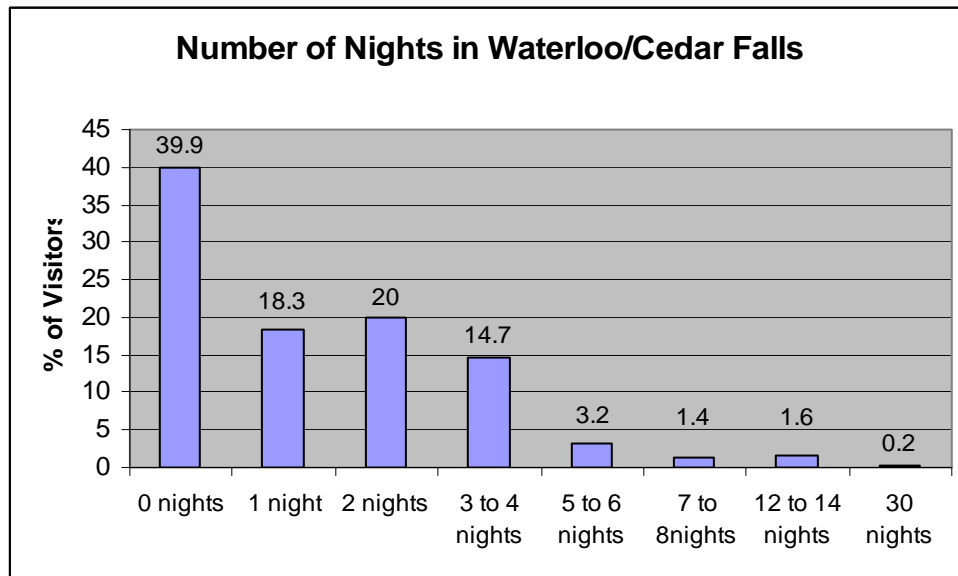
A little over half of the visitors (51.2%) said they were traveling with their family. Fifteen percent said they were alone. Almost 12% said their travel party was something different than what was on the list.

As a comparison, the Iowa Welcome Centers report 61.5% of parties are traveling with their family however the data collected for the Cedar Falls/Waterloo study suggests that 52.2% are traveling with families.

f. Length of Stay

Visitors were asked how many nights they were planning on staying in the Cedar Valley. The importance of this question is to help determine the direct economic impact of travelers as reported later in the study.

Chart 8: Number of Nights in Waterloo/Cedar Falls



Source: Waterloo/Cedar Falls Intercept Survey-2003-2004 UNI-STEP

Almost 40% of the visitors to the Cedar Valley did not stay overnight. If visitors did stay overnight they usually stayed 1 to 2 nights with a total of 38.3 % of the visitors saying they stayed that long. The larger number of nights stayed may have been business travelers.

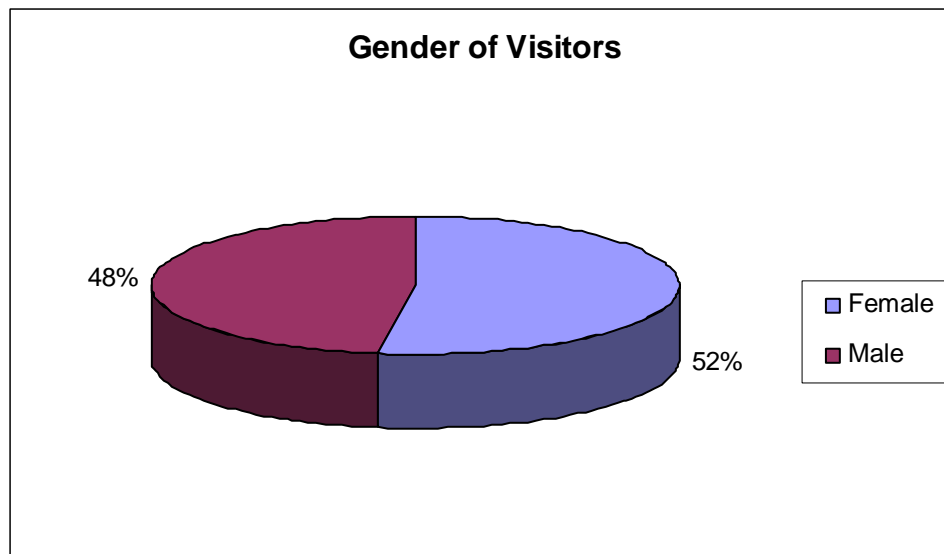
In a comparison, the Iowa Welcome Centers report the average number of days stayed is 3.8, however the data collected for the Cedar Falls/Waterloo study suggests visitors only stay 1.7 days.

B. Visitor Profile

The visitor profile consists of the age, gender, income and where the visitors' originate. The visitor profile can be used to help market the area by knowing what area advertise and what age range to target.

a. Gender

Chart 9: Gender of Visitors

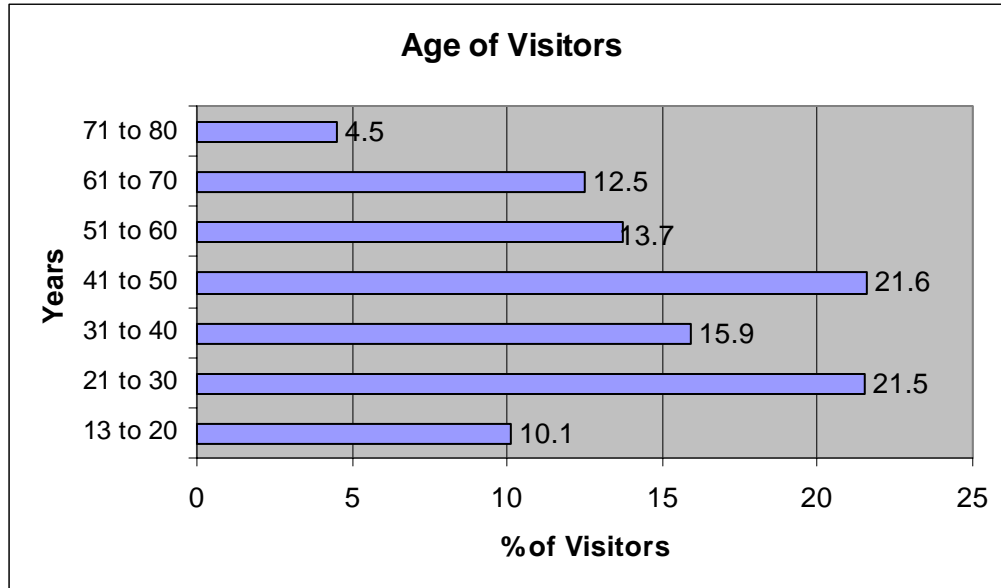


Source: Waterloo/Cedar Falls Intercept Survey-2003-2004 UNI-STEP

The gender of visitors to the Cedar Valley was very close to being equal, with females 52%, and male visitors 48% of those intercepted at the represented area events and sites.

b. Age

Chart 10: Age of Visitors



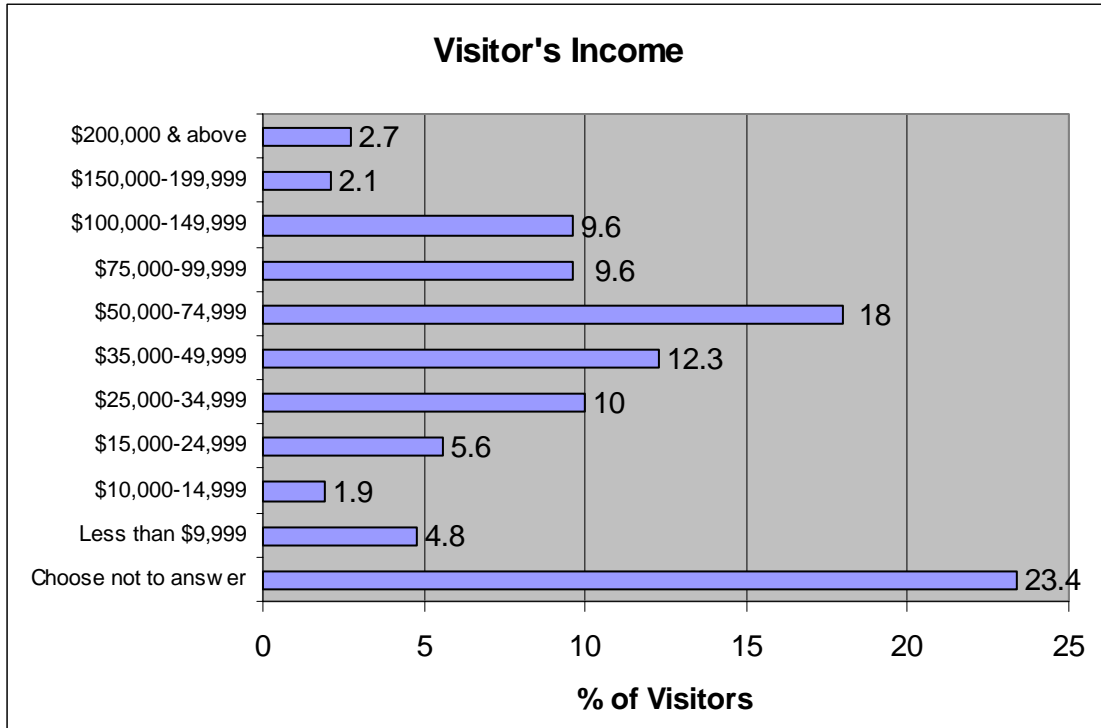
Source: Waterloo/Cedar Falls Intercept Survey-2003-2004 UNI-STEP

The most common age of visitors was between 21 to 30 years old (21.5%) and 41 to 50 years old (21.6%). In comparison, the Iowa Welcome Centers found the average age of visitors to be 54.6 years old, however data collected for the Waterloo/Cedar Falls study suggests the average age to be 41.8 years old.

c. Location of Visitor

d. Income

Chart 11: Visitor's Income



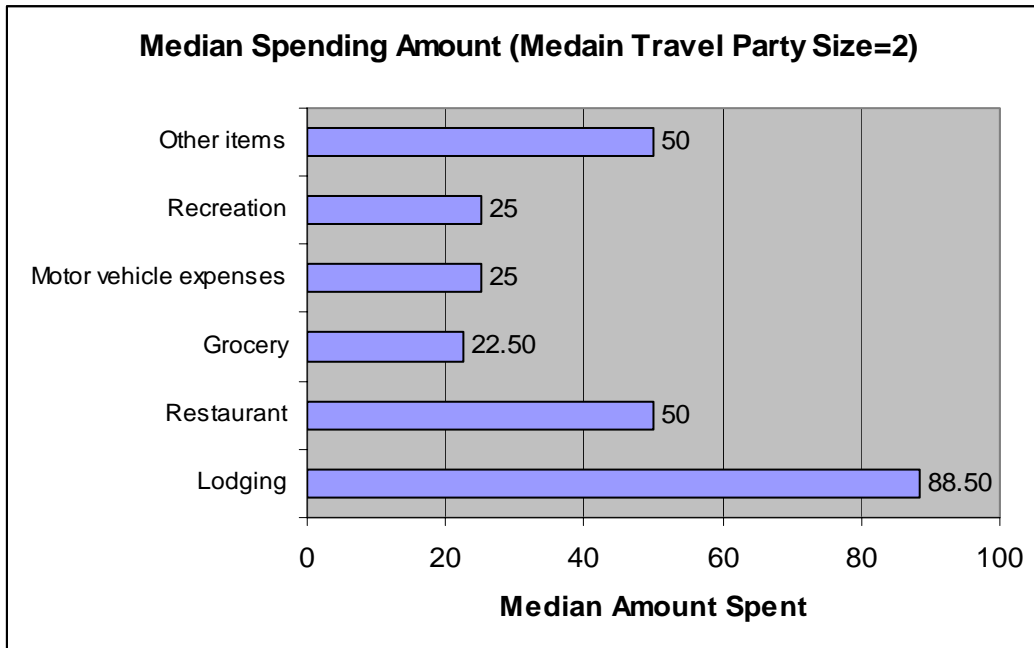
Source: Waterloo/Cedar Falls Intercept Survey-2003-2004 UNI-STEP

Eighteen percent of the visitors had an income level range of \$50,000 to \$74,999. A little more than 12% had an income level in the range of \$35,000 to \$49,000 and under a fourth of the visitors (23.4%) chose not to answer this question.

C. Spending Patterns

Visitors can spend a significant amount of money while they are visiting a city. This can provide a significant economic impact for the city and the people living in the city. This chart shows the median spending amount of the visitors. The median amount was used in order to eliminate the effect of the outliers more. Outliers are values that are far from the other values in the data set.

Chart 12: Median Spending Amount of Visitors



Source: Waterloo/Cedar Falls Intercept Survey-2003-2004 UNI-STEP

The median spending amount for a median travel party size of 2 in the lodging category was \$88.50 per visit. The restaurant and other items each had median spending amounts of \$50. Recreation and motor vehicle expenses each had median spending amounts of \$25. The total median spending per travel party was \$261.

Table 2 shows the differences between the total, mean, and median spending of visitors.

Table 2: Total, Mean, Median Spending

	Total	Mean	Median
Lodging	14,980	136.18	88.5
Restaurant	56,872	171.82	50
Grocery	5330	41	22.5
Transportation Cost	13,090	49.21	25
Entertainment	12,284	71.84	25
Other items	98,348	919.14	50
Total	200,904	1389.19	261

Source: Waterloo/Cedar Falls Intercept Survey-2003-2004 UNI-STEP

The total spending by all visitors surveyed in the Cedar Valley was \$200,904. The highest category was other items with \$98,348. The next highest was restaurant with \$56,872 followed by \$14,980 spent on lodging. The mean total of by travel party in the Cedar Valley was \$2389.19 compared to the median spending total of \$261. The mean number is higher due to one or more outliers.

Other items had the highest mean value of \$919.14. Like the total spending restaurant came next with \$171.82 followed by lodging with \$136.18.

Lodging had the highest median value of \$88.50 unlike the mean and total values. It was followed the restaurant and other items categories which both had \$50.

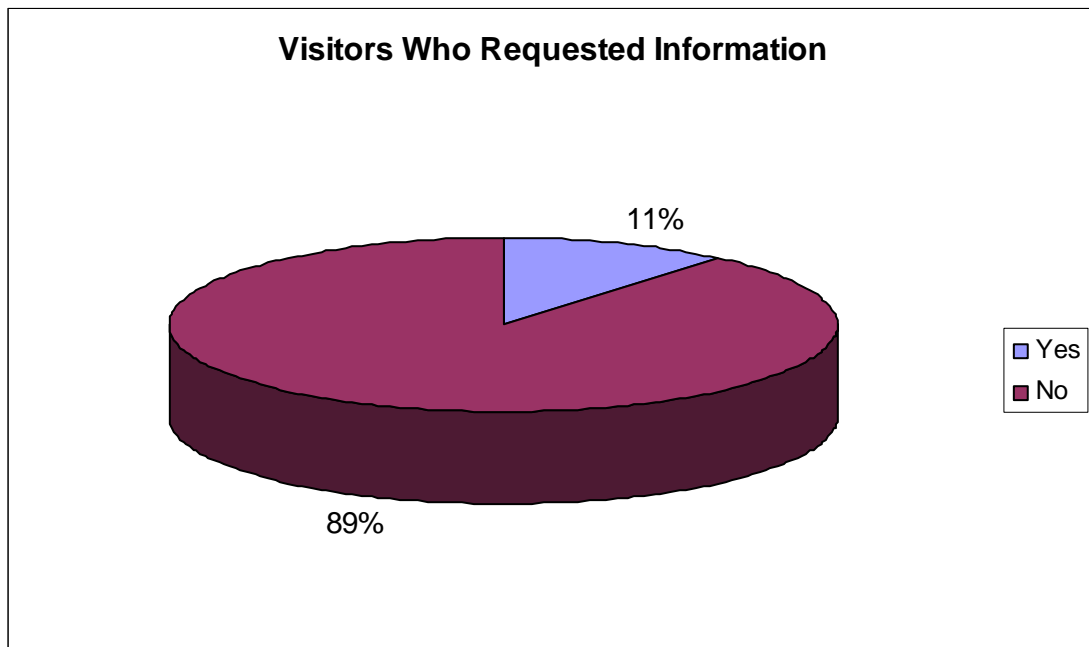
D. Trip Planning & Information Seeking

In order to determine trip planning and information seeking, visitors were asked what advertisements they saw in the area and if they stopped for recreational purposes because they saw a road sign.

a. Requesting Information

This chart shows how many visitors requested information before they visited the area.

Chart 13: Visitors Who Requested Information



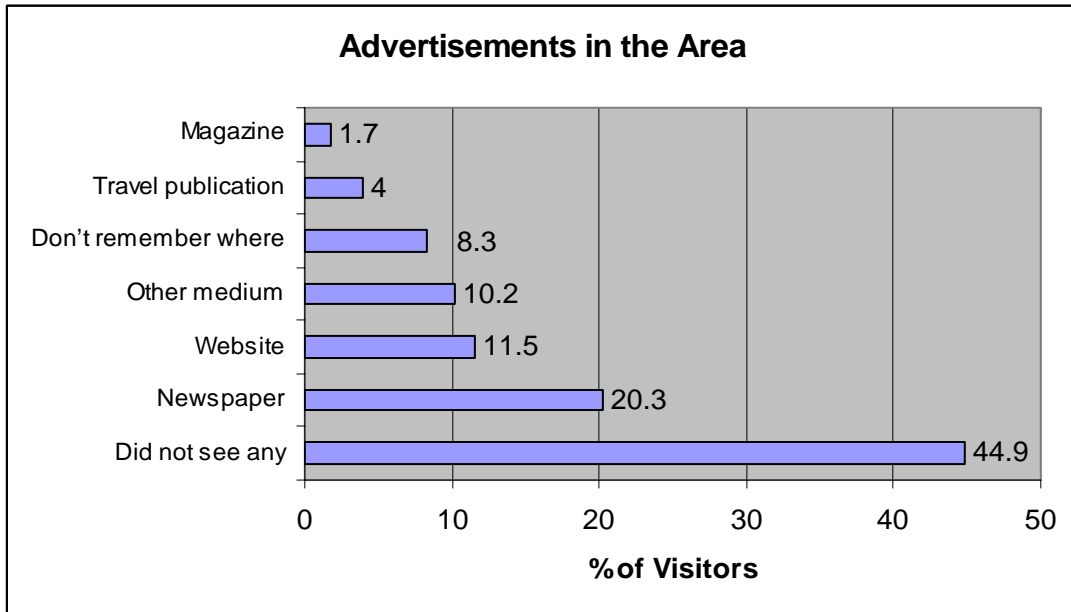
Source: Waterloo/Cedar Falls Intercept Survey-2003-2004 UNI-STEP

The majority of visitors did not request or receive any information about the area before they visited. Eighty-nine percent said they did not request or receive any information before visiting. Only 11% of visitors requested and received information before they visited.

b. Advertisements in the Area

Visitors were also asked if they saw any advertisements for the area before they left on their trip to Waterloo/Cedar Falls. Visitors were also asked to indicate the type of information source they saw or use.

Chart 14: Advertisements in the Area



Source: Waterloo/Cedar Falls Intercept Survey-2003-2004 UNI-STEP

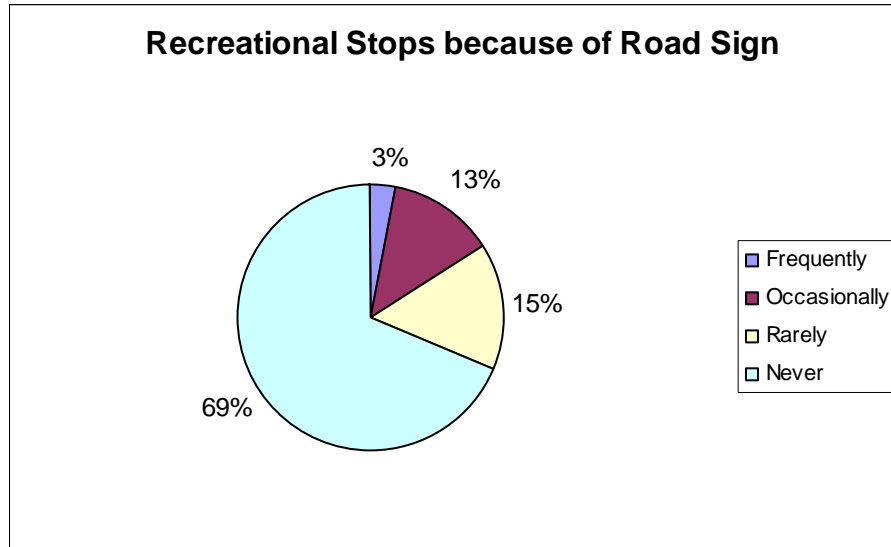
Many of the visitors did not see any advertisements before they visited. If they did see advertisements the medium most visitors saw advertisements in was the newspaper with 20.3% of visitors. They also saw advertisements on a website (11.5%) or some other medium than the ones listed (10.2%).

The responses visitors gave for other medium included: radio, TV specifically KWWL, a brochure, the website www.thefaire.com, posters, pamphlets, billboard at the Flying J truck stop, University Of Northern Iowa, Des Moines Register, motel booklet, friends, Iowa Welcome Center, flyer, AAA book, brother, and an advertisement on a roadside billboard.

c. Road Sign Recreational Stops

Visitors were asked if their recreational stops were because they saw a road sign while on route to the Cedar Valley.

Chart 15: Recreational Stops because of Road Sign



Source: Waterloo/Cedar Falls Intercept Survey-UNI-STEP-2003-2004 UNI-STEP

Most of the visitors (69%) did not make any recreational stops because they saw a road sign. Only 3% of the visitors made recreational stops because they saw a road sign.

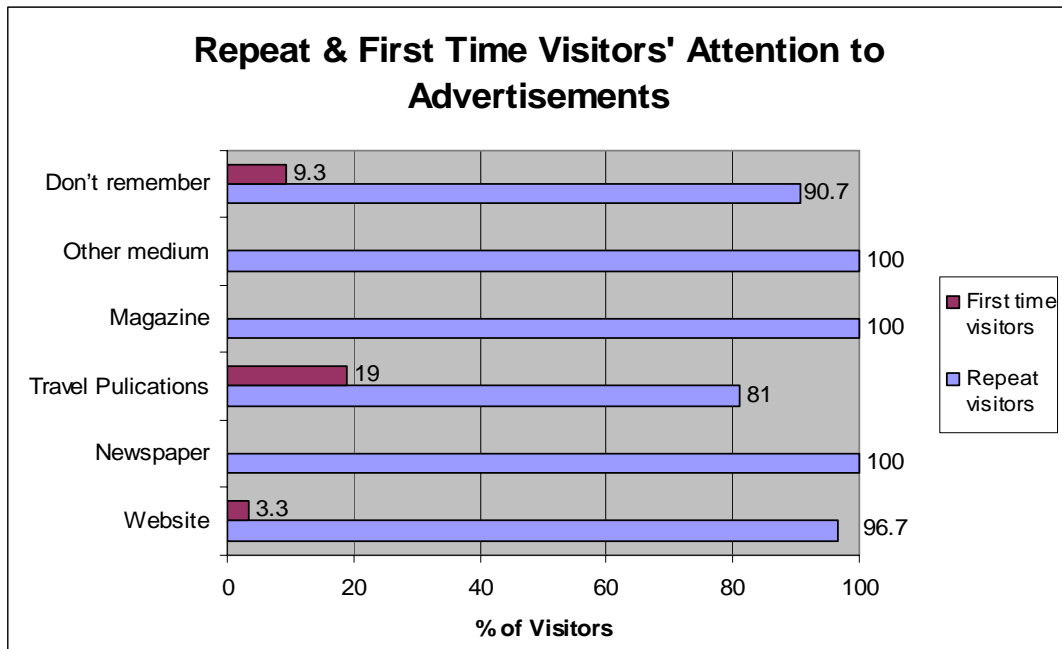
E. Marketing and Promotion

Marketing and promotion information helps determine where visitors are getting their information and who is receiving it. Crosstabulations have been used to examine advertising sources and some of the questions on the survey. A crosstabulation is a way of comparing two different questions and determining a conclusion based on those two questions. Crosstabulations were run on the advertising source and repeat and first time visitors, travel party characteristics, spending patterns of visitors, trip satisfaction of visitors, gender, and income of visitors.

a. Repeat and First Time Visitors by Advertising Source

A crosstabulation of repeat and first time visitors was used to see if visitors saw advertisements before they traveled to the Cedar Valley. The results of this crosstabulation are skewed towards the repeat visitors (n=459) because only 10% of the visitors were first time visitors.

Chart 16: Repeat & First Time Visitors' Attention to Advertisements



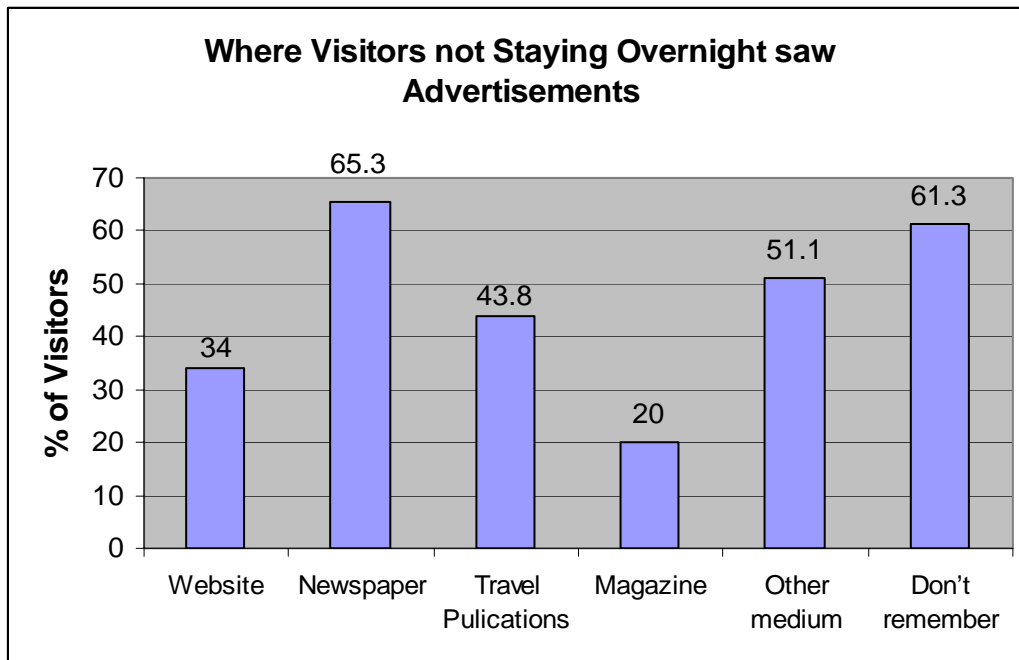
Source: Waterloo/Cedar Falls Intercept Survey-2003-2004 UNI-STEP

The visitors who saw advertisements before they traveled to the Cedar Valley were mostly repeat visitors. Most first time visitors (19%) saw advertisements in travel publications.

b. Nights Stayed by Advertising Source

Chart 17 shows where visitors not spending the night in Waterloo/Cedar Falls saw advertisements before their trip. Please note, visitors could check more than one advertising source which is why the total is over 100%.

Chart 17: Where Visitors not Staying Overnight saw Advertisements

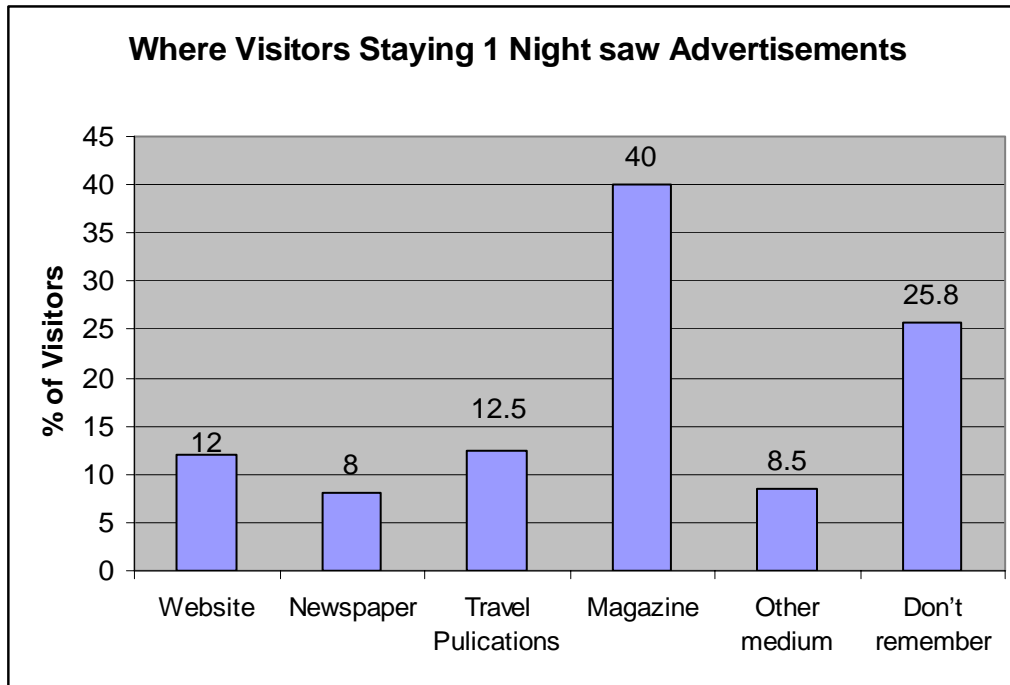


Source: Waterloo/Cedar Falls Intercept Survey-2003-2004 UNI-STEP

About 65% of visitors not spending the night saw advertisements in the newspaper before they came to Cedar Falls/Waterloo. A little over 61% of the visitors could not remember where they saw advertisements. Fifty-one percent of visitors saw advertisements in a medium other than the ones mentioned here.

Chart 18 presents where the visitors staying one night in Waterloo/Cedar Falls saw advertisements before their trip

Chart 18: Where Visitors Staying 1 Night saw Advertisements

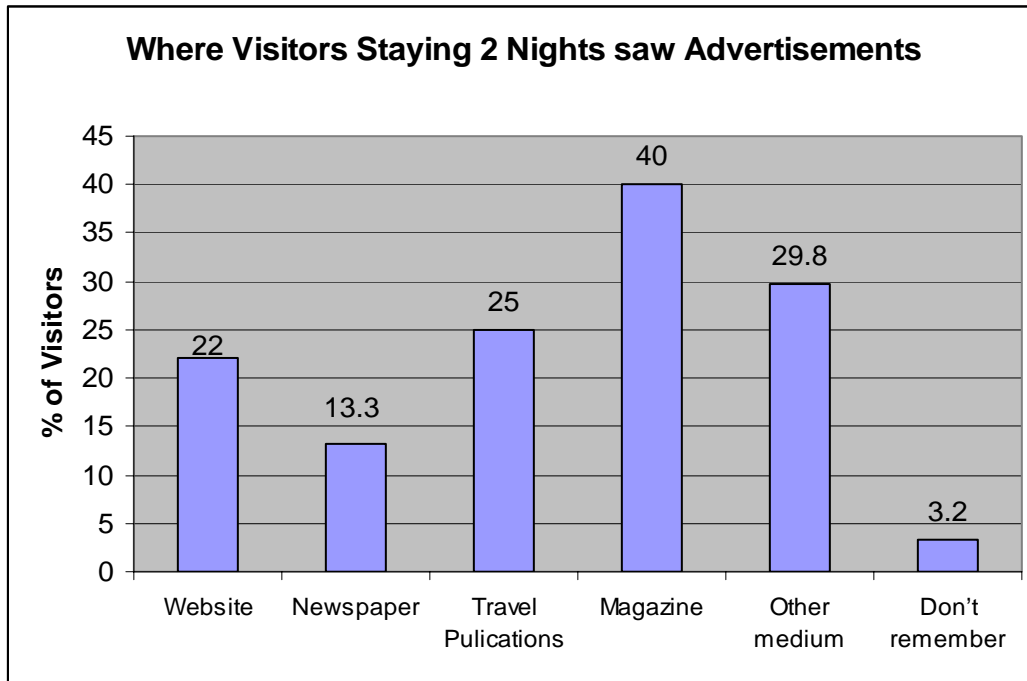


Source: Waterloo/Cedar Falls Intercept Survey-2003-2004 UNI-STEP

Visitors staying one night in the Cedar Valley saw the most advertisements in magazines (40%). Almost 26% of these visitors do not remember where they saw advertisements for the Cedar Valley.

Chart 19 presents where the visitors staying two nights in Waterloo/Cedar Falls saw advertisements before their trip

Chart 19: Where Visitors Staying 2 Nights saw Advertisements

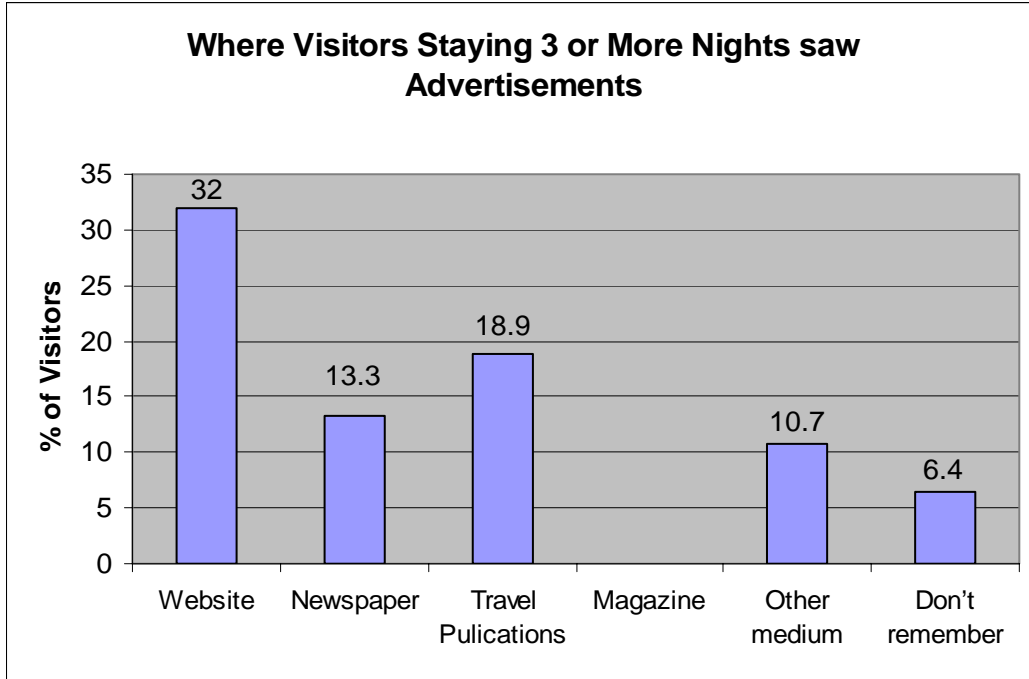


Source: Waterloo/Cedar Falls Intercept Survey-2003-2004 UNI-STEP

Forty percent of visitors staying two nights in the Cedar Valley saw advertisements in a magazine. Almost 30% of these visitors saw advertisements in a medium other than the ones mentioned. Twenty-five percent of these visitors saw advertisements in a travel publication.

Chart 20 presents where the visitors staying three or more nights in Waterloo/Cedar Falls saw advertisements before their trip

Chart 20: Where Visitors Staying 3 or More Nights saw Advertisements



Source: Waterloo/Cedar Falls Intercept Survey-2003-2004 UNI-STEP

Thirty-two percent of visitors staying 3 nights in the Cedar Valley saw advertisements in on a website. About 19% of these visitors saw advertisements in a travel publication.

c. Travel Party Characteristics by Advertising Source

A crosstabulation between the type of travel party group and where visitors saw advertisements was run to find out where different groups are seeing advertisements for the Cedar Valley.

Table 3: Travel Party Characteristics by Advertising Source

Website	
Family	64.4%
Self	22%
Other group	11.9%
College group	1.7%
Newspaper	
Family	60.2%
Self	20.4%
Other group	14.6%
College group	2.9%
Sport team	1.9%
Travel Publication	
Family	61.9%
Other group	23.5%
College group	4.8%
Sport team	4.8%
Self	4.8%
Magazine	
Family	77.8%
Other group	22.2%
Other Medium	
Family	67.9%
Other group	13.2%
Self	18.9%
Don't Remember	
Family	53.7%
Self	24.4%
Other group	12.2%
High school group	2.4%
Grade school group	2.4%
College group	2.4%
Sport team	2.4%

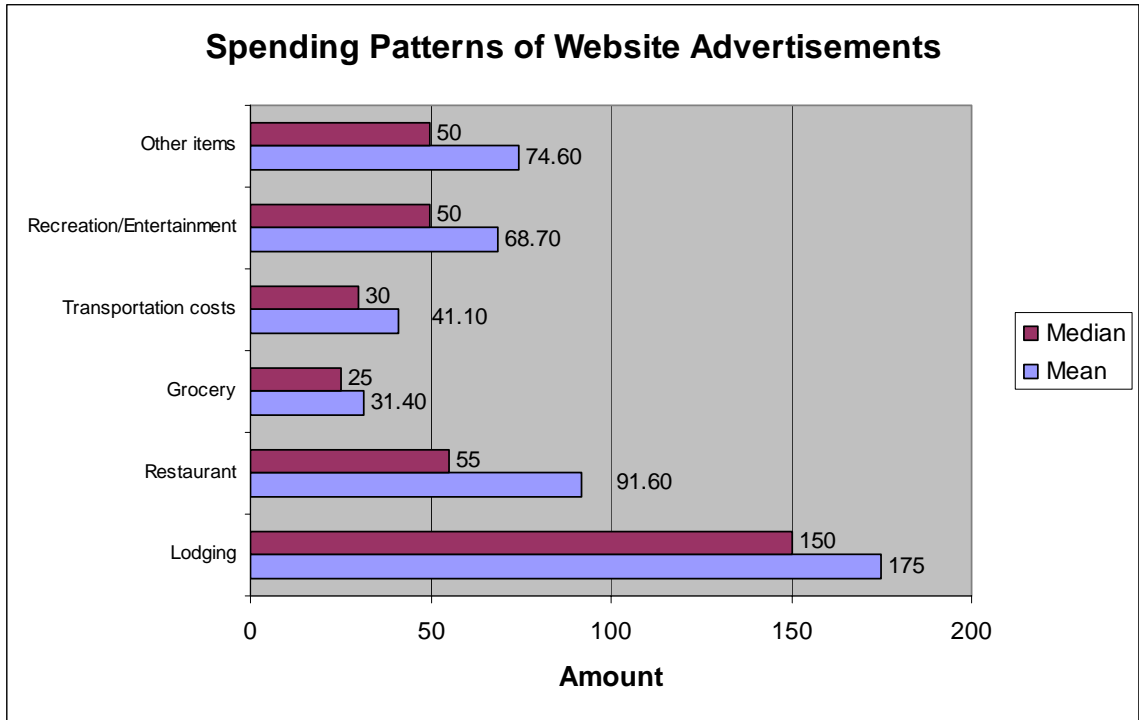
Source: Waterloo/Cedar Falls Intercept Survey-2003-2004 UNI-STEP

Visitors traveling with their family had the highest percentage in all of the categories. This is probably the case because over 50% of visitors were traveling with their families. Visitors traveling alone saw advertisements in newspapers, on a website, and could not remember where they saw advertisements.

d. Spending Patterns by Advertising Source

A crosstabulation analysis of spending patterns of visitors and where they saw advertisements was completed. The mean and median spending was calculated for each category.

Chart 21: Spending Patterns of Website Advertisements

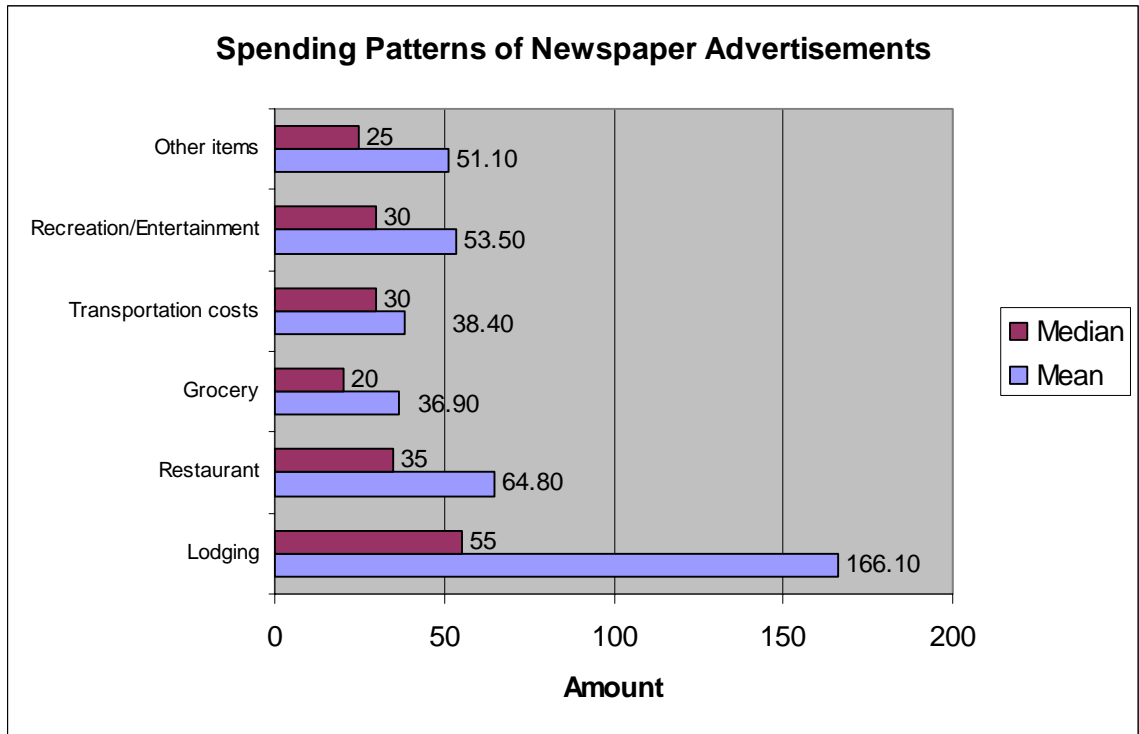


Source: Waterloo/Cedar Falls Intercept Survey-2003-2004 UNI-STEP

The spending mean was higher in all the categories and it was especially higher for restaurants. Lodging had the highest expenditure with \$150 (median) and \$175 (mean).

A crosstabulation was done on the spending patterns of visitors who got their information from a newspaper.

Chart 22: Spending Patterns of Newspaper Advertisements

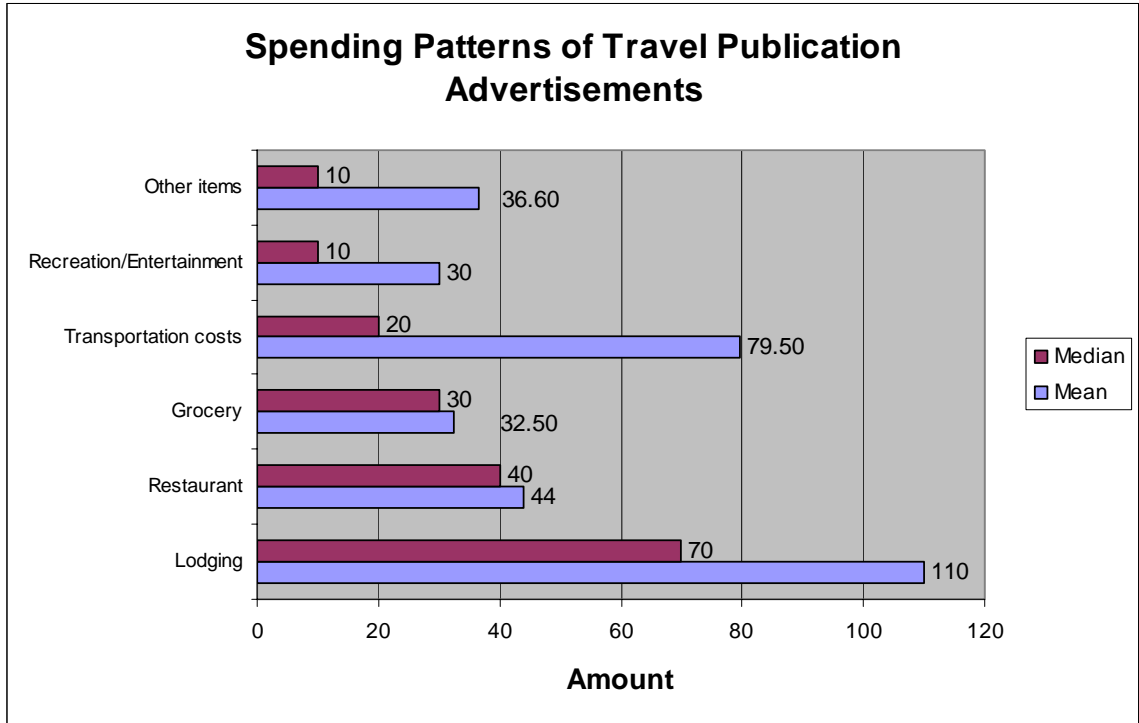


Source: Waterloo/Cedar Falls Intercept Survey-2003-2004 UNI-STEP

As with the website advertisements, the mean expenditure amounts are all higher than the median. This was especially true for lodging with the mean being \$166.10 and the median only being \$55. Lodging reported the highest spending amount in all the categories. All of the other categories only had a slightly higher mean.

A crosstabulation was done on the spending patterns of visitors who got their information from a travel publication.

Chart 23: Spending Patterns of Travel Publication Advertisements

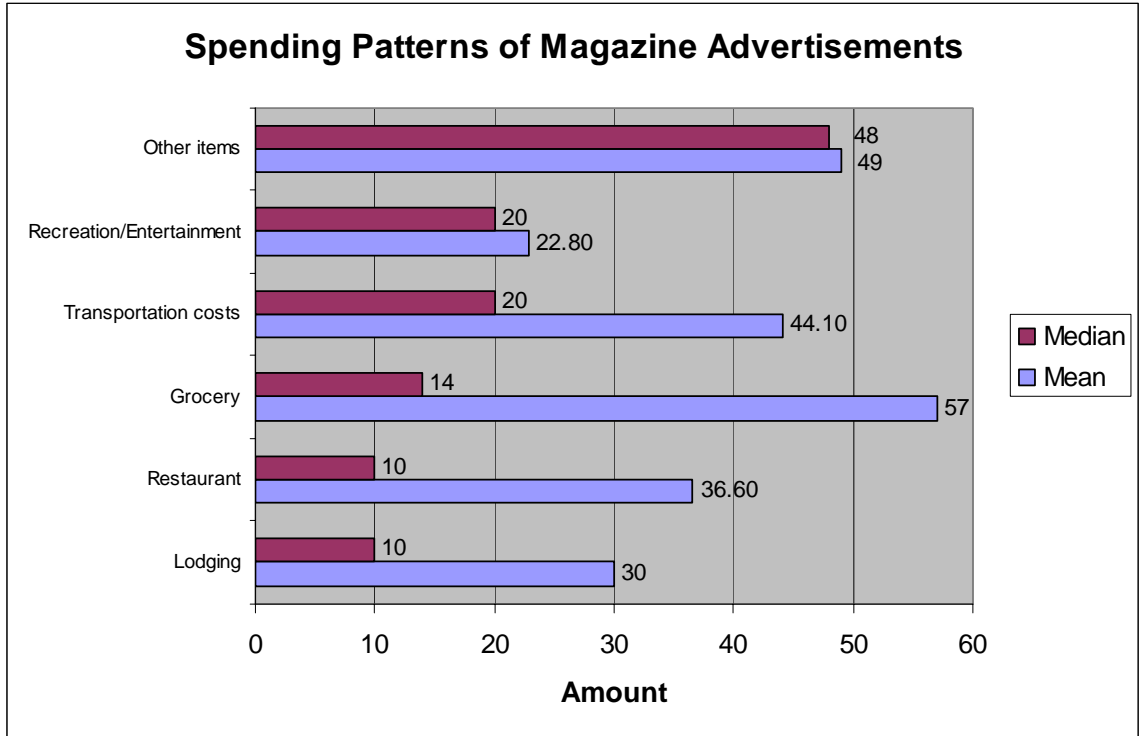


Source: Waterloo/Cedar Falls Intercept Survey-2003-2004 UNI-STEP

The mean for lodging was \$110 and the median was \$70. Lodging also had the highest spending amount. Transportation costs had a significantly higher mean with \$79.50 compared to the median of only \$20. The other categories were pretty close but the closest was the grocery which had a mean of \$32.50 and a median of \$30.

A crosstabulation was done on the spending patterns of visitors who got their information from a magazine.

Chart 24: Spending Patterns of Magazine Advertisements

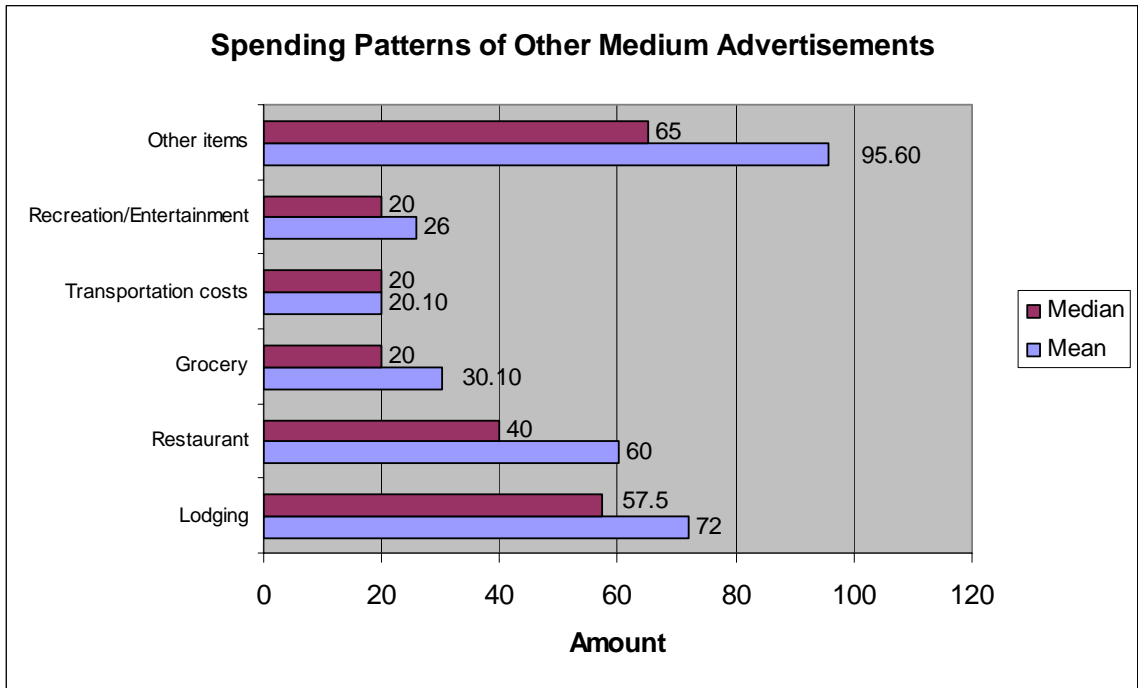


Source: Waterloo/Cedar Falls Intercept Survey-2003-2004 UNI-STEP

Grocery had the biggest difference with the mean being \$57 and the median only \$14. This category also had the highest spending amount. Transportation costs had a huge difference with the mean being \$44.10 and the median \$20. All other items was the closest category with the mean being \$49 and the median being \$48.

A crosstabulation was done on the spending patterns of visitors who got their information from another medium besides the ones mentioned.

Chart 25: Spending Patterns of Other Medium Advertisements

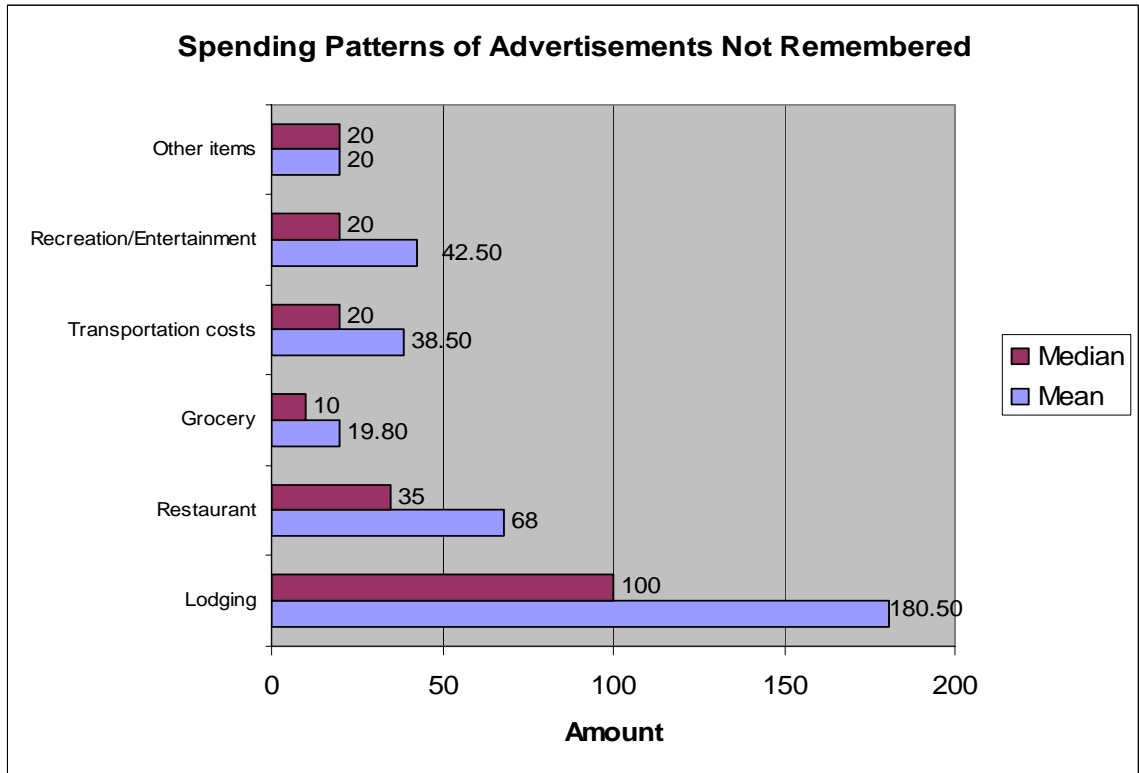


Source: Waterloo/Cedar Falls Intercept Survey-2003-2004 UNI-STEP

The category with the biggest difference, other items, had a mean on \$95.60 and a median of \$65. Restaurant was a category that had a bigger difference with \$60 for the mean and \$40 for the median. Transportation cost had the closest mean and median. The mean was \$20.10 and the median was \$20. Other items had the biggest expenditure.

A crosstabulation was done on the spending patterns of visitors who got their information from an advertisement but they did not remember where.

Chart 26: Spending Patterns of Advertisements Not Remembered



Source: Waterloo/Cedar Falls Intercept Survey-2003-2004 UNI-STEP

Lodging had the highest expenditure in all the categories and it also had the most difference between the mean and median. The mean was \$180.50 and the median was \$100 for lodging expenditure per travel party. Other items had the same mean and median with \$20 and grocery had closest mean and median with \$19.80 and \$10, respectively.

e. Primary Purpose by Advertising Source

A crosstabulation was run on the primary purpose of visitors and where they saw advertisements. Each advertising source contains the top primary purposes by the number of visitors. Community festival was high in many of them because there were many surveys that were collected at My Waterloo Days and Sturgis Falls.

Table 4: Primary Purpose by Advertising Source

Website	
Community festival	4.8%
Visit friends/relatives	4.8%
Other	1.7%
Newspaper	
Community festival	6%
Visit friends/relatives	5.2%
Sporting event	3.5%
Travel Publication	
Community festival	1.6%
Visit friends/relatives	0.6%
Magazine	
Other business	0.6%
Visit friends/relatives	0.4%
Community festival	0.4%
Other Medium	
Community festival	4.4%
Visit friends/relatives	1.9%
Cattle Congress	1.5%
Don't Remember	
Visit friends/relatives	3.3%
Other	1.7%
Performing arts	1.7%

Source: Waterloo/Cedar Falls Intercept Survey-2003-2004 UNI-STEP

Community festival was the primary purpose for visitor whom saw advertisements on a website, in a newspaper, in a travel publication, or in an other medium. Visiting friends and relatives was the primary purpose for visitors who could not remember where they saw advertising, however it was the second highest reason for visiting for all the other categories. Visitors who were visiting because of other business saw advertisements the most in magazines.

f. Gender by Advertising Source

A crosstabulation was run on the gender of the visitor and where they saw advertisements.

Table 5: Gender of Visitors & Where They Saw Advertisements

	Female	Male
Website	44.1%	55.9%
Newspaper	50%	50%
Travel publications	52.4%	47.6%
Magazine	66.7%	33.3%
Other medium	49%	51%
Don't remember where	61.9%	38.1%

Source: Waterloo/Cedar Falls Intercept Survey-2003-2004 UNI-STEP

For the most part the gender of visitors was about the same for where they saw advertisements. For the visitors who could not recall the advertisements they saw, females did not remember more with almost 62%. For the visitors who saw advertisements in a magazine, females saw more magazine advertisements with 66.7%.

g. Income by Advertising Source

A crosstabulation was run between the visitors' income and where they saw advertisements. This chart shows the visitors who saw advertisements on a website and visitors' income.

Table 6: Income by Advertising Source

	Website	Newspaper	Travel publications	Magazine	Other medium	Don't remember where
Choose not to answer	3.4%	3.1%		12.5%	2.1%	5.1%
Less than \$9,999	1.7%	1%	9.5%		2.1%	2.6%
\$10,000-14,999	5.2%	7.2%	14.3%		4.2%	7.7%
\$15,000-24,999	5.2%	9.3%	4.8%		12.5%	10.3%
\$25,000-34,999	8.6%	12.4%	2.8%	12.5%	14.6%	15.4%
\$35,000-49,999	19%	24.7%	14.3%	12.5%	16.7%	12.8%
\$50,000-74,999	10.3%	12.4%	4.8%		6.3%	10.3%
\$75,000-99,999	13.8%	6.2%	9.5%		8.3%	10.3%
\$100,000-149,999	3.4%	1%	9.5%	12.5%	2.1%	
\$150,000-199,999	3.4%	2.1%	4.8%	12.5%	2.1%	2.6%
\$200,000 & above	25.9%	20.6%	23.8%	37.5%	29.2%	23.1%

Source: Waterloo/Cedar Falls Intercept Survey-2003-2004 UNI-STEP

Almost 26% of visitors who saw advertisements on a website had an income of \$200,000 and above. Almost 25% of visitors who saw advertisements in a newspaper had an income of \$35,000-49,999. Visitors who had an income of \$200,000 or above (23.8%) saw advertisements in travel publications. Visitors who saw advertisements in a magazine (37.5%) had an income of \$200,000 and above. Almost 30% of visitors who saw advertisements in a medium besides the ones mentioned had an income level of \$200,000 and above. Visitors with an income of \$200,000 and above saw advertisements but could not remember where they saw them (23.1%).

h. Trip Satisfaction by Advertising Source

A crosstabulation between the advertising source visitors used and their trip satisfaction was conducted. This table refers to the advertising source of visitors and the number of visitors who were very satisfied, satisfied, neutral, dissatisfied, and very dissatisfied with their trip.

Table 7: Trip Satisfaction & Advertising Source

	Very Satisfied	Satisfied	Neutral	Dissatisfied	Very Dissatisfied
Website	56%	40%		2%	2%
Newspaper	47%	42%	10%		1%
Travel Publications	55%	35%	10%		
Magazine	45%	44%	11%		
Other Medium	49%	47%	4%		
Don't Remember Where	59%	34%	7%		

Source: Waterloo/Cedar Falls Intercept Survey-2003-2004 UNI-STEP

There were only 5% of visitors who were dissatisfied or very dissatisfied with their trip to Cedar Falls/Waterloo. Newspaper advertisements had the most very satisfied visitors (47%) followed by website (56%). Other medium had the most satisfied visitors (47%) followed by magazine (44%).

F. Trip Satisfaction

a. Strengths

There are many different strengths that the Cedar Valley has to offer its visitors. The top 6 strengths that were reported by visitors, in order, of the Cedar Valley were the University of Northern Iowa, shopping, good variety of things to do and good entertainment, friendly people, the bike trails, and the restaurants. When visitors referred to the University of Northern Iowa it ranged from just talking about the university in general, the Dome, the Gallagher-Bluedorn Performing Arts Center, and other attractions or buildings on the campus. When visitors commented on the friendly people they were talking about their helpfulness, their hospitality, and the kindness towards visitors.

Along with the friendly people visitors also liked the friendly atmosphere the Cedar Valley has. A strength the communities also have is their annual fairs and community events as reported by visitors. These events include Sturgis Falls, My Waterloo Days, and Cattle Congress. A few visitors mentioned how much they liked the Renaissance Fair and the parade at My Waterloo Days. Others mentioned events that were held at Electric Park.

Many visitors said how clean the Cedar Valley is and how beautiful the scenery is to look at. Another strength of Cedar Falls and Waterloo was the family and friends visitors have here but also the family aspect it provides for its visitors. The Cedar Valley is also very close to many visitors and is very accessible when they are in the area. Cedar Falls and Waterloo are also a good place to visit because of the size as visitors reported. It is not a huge city but it has a lot of offer its visitors. The highway system to get to the Cedar Valley is also a strength of the area and that makes visitors want to come more if it is easier to get to.

Visitors also think the parks in the Cedar Valley are strength to the community. The river that runs next to a lot of the parks is a positive aspect of the Cedar Valley. The new Lost Island Water Park is also a strength to the community. Visitors also think the Cedar Valley also has a good arts program between the university and the different museums in the area. Some of the other attractions that are strengths to the Cedar Valley is the convention center, Young Arena, John Deere, golf courses, museums, recreation center,

cattle congress, and the skate park. Visitors also thought the campgrounds and lodging in the Cedar Valley excellent.

There is good diversity in the Cedar Valley and many strong traditions. The prices in the Cedar Valley are very competitive and not priced too high. Visitors also liked the small community atmosphere and the good organization at different events.

There were also a lot of visitors who gave some additional strengths that were not mentioned by any other visitors. These strengths include; the industry, greenness, bars, tour guides, advertising, easy parking, safe, peaceful, music, downtown area, university events, industrial park, road access, jet services, farming, nice environment, the theater, craft show, business, nice facilities, pleasant area, football playoffs, Waterloo Open, and the sports events in the Cedar Valley.

b. Weaknesses

Visitors to the Cedar Valley said that it had much strength to offer but like any place it has its weaknesses too. The top 6 weaknesses, in order, include lack of entertainment and things to do, signage, not enough restaurants, cleanliness, road system, and too much crime.

There were not as many weaknesses as strengths. Strengths had more visitors repeat the same items as being strengths. These weaknesses had two or more visitors say them as being a weakness. They include; a black downtown, no downtown stores in Waterloo, the governing of the city, no job opportunities, bad traffic, need more culture, not enough parking, need more direct flights at the airport, too high of fees, dislike Waterloo, mosquitoes, river depth, it is too big, high property taxes, run down housing, need more recreation, not enough lodging, and bad weather.

The next groups of weaknesses were only said by one visitor. They include; trying to make money off people, it has confusing streets, the distance, gas prices are too high, it is too windy, the people, it needs more organization, there are no driving directions to Waterloo on the website, it has a bad reputation, University of Northern Iowa, lodging, too crowded, the convention center, the hockey arena, advertising, strict traffic laws, pot holes on the street, road construction, boat house event, no country bar to dance, no amusement park, bad smells, shopping, and not enough live music venues.

c. Reasons for not visiting in the Future

This chart shows the reasons why visitors would not return to the Cedar Valley. The percentages do not equal 100% because visitors could pick more than one and some people did not respond to the question.

Table 8: Reasons for not Visiting in the Future

Lack of time	21.1%
Distance from home	12.5%
Other places to go	12.3%
Lack of activities	11.7%
Lack of money	10%
Lack of information	5.8%
Other	4.2%
Transportation cost	3.1%
Fees/Cost	2.9%
Environmental Quality	1.3%
Customer Service	1.2%
Food service	1%
Lodging	.6%

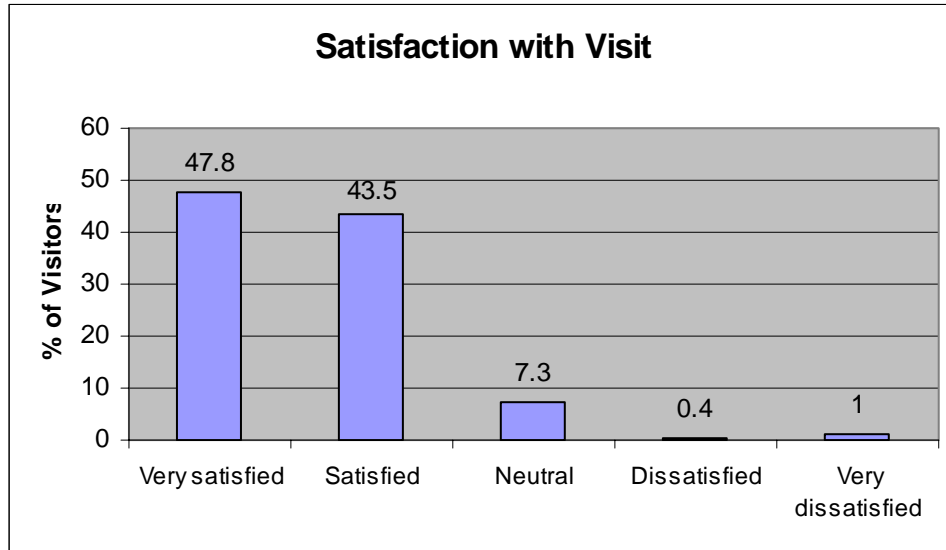
Source: Waterloo/Cedar Falls Intercept Survey-2003-2004 UNI-STEP

The most common reason preventing visitors from visiting the Cedar Valley is lack of time with 21.1% of visitors responding to this. Distance from home (12.5%) and other places to go (12.3%) were the next highest.

d. Overall Trip Satisfaction

Visitors were asked how their overall satisfaction with their trip was.

Chart 27: Overall Satisfaction with Visit



Source: Waterloo/Cedar Falls Intercept Survey-2003-2004 UNI-STEP

Visitors were mostly very satisfied or satisfied with their visit to the Cedar Valley. Forty-seven point eight percent of visitors were very satisfied. Forty-three and a half percent of visitors were satisfied with their trip. These 2 categories combined equal 91.3% of all the visitors.