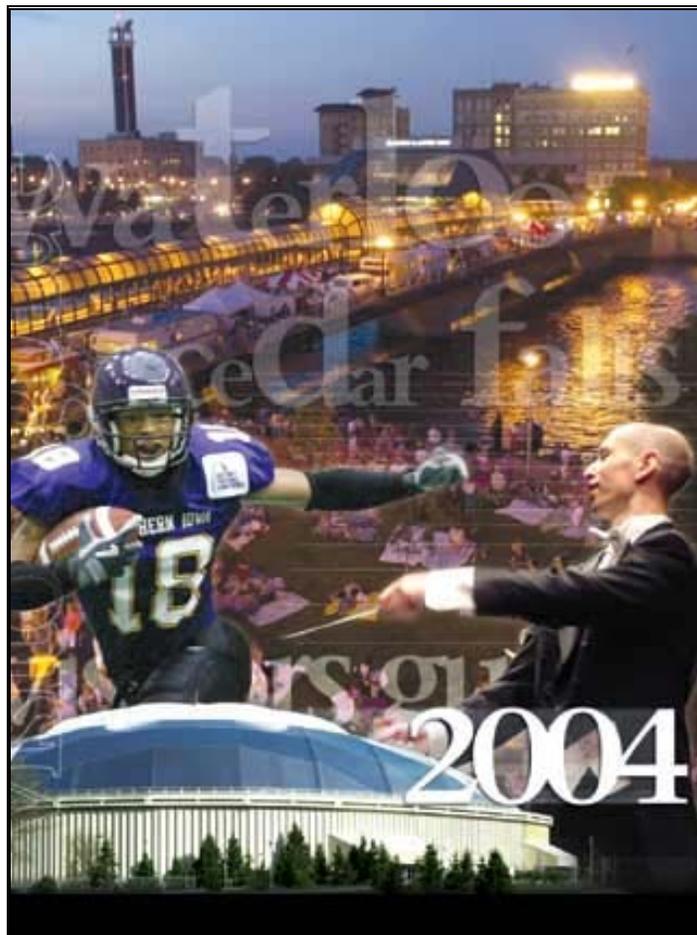# Waterloo/Cedar Falls Tourism Advertisement Conversion Study 2003-04

Mail-Out Survey Report
Prepared by: UNI - STEP

Waterloo/Cedar Falls Advertisement Conversion Study 2003-04

Presented to:
Cedar Falls Visitor and Tourism Office
Waterloo Convention & Visitors Bureau

Presented by:
University of Northern Iowa
Sustainable Tourism & the
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Waterloo/Cedar Falls Advertisement Conversion Study

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Executive Summary

This study was conducted by the University of Northern Iowa, Sustainable Tourism & the Environment Program (STEP) in cooperation with Waterloo and Cedar Falls tourism offices. The purpose of the study is to gain a better understanding of their current visitors, understand how and where to most effectively advertise, and identify ways to improve visitor's experiences when traveling to the Cedar Valley.

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

The mail surveys generated 237 responses out of the 502 surveys that were initially mailed. While, there were a total of 522 intercept surveys collected from 24 sites/events.

The study concluded that:

➤ There was an even distribution among repeat visitors (52%) and first time visitors (48%), being mainly for pleasure (85%), versus for business (15%), as their primary purpose of trip. Most of the respondents were female (67%) and were coming from Iowa or neighboring states.

➤ The total direct economic impact assessed for the sample in this study was $36,914. Respondents making use of website advertisement had the highest mean and median spending, while those who viewed a newspaper advertisement had the lowest mean and median spending.

➤ The phone and Internet information requests are higher in Waterloo than in Cedar Falls. A majority of the respondents (71%) requested information before they visited the area, mainly from a magazine (18.5%). While they are in the Cedar Valley, respondents reported using mainly the CVB (20.5%) for information. The magazine advertisements seemed to generate the most first time visitors, with 26.1% of those who viewed the magazine advertisements.

➤ Finally, respondents were overall (95%) either satisfied or very satisfied with their entire trip to Waterloo/Cedar Falls.

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 visitor 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 associated with their cooperative advertising efforts. Their primary advertising outlets include magazine, website, newspaper, and travel publications. The question remains, which of these outlets bring in the most actual visitors and which are producing the most economic impact to the community for the marketing dollars spent. These questions can be addressed with this type of marketing research. "Effective decision making depends on the quality of the information input, and marketing research plays an essential role in providing accurate and useful information" (Churchill, Jr., pg.5). This study will examine each outlet in order to determine the most effective use of marketing dollars would.

A. Purpose of Study

This study includes an analysis of travel motivations, characteristics, and patterns of current visitors to the Cedar Valley area. The methods 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 identify ways to improve visitor's experiences when traveling to the Cedar Valley.

B. 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. Objectives of this research include: to identify existing travelers using standardized tourist market segmentation methods, identify traveler preferences and motivations, specifically related to the Cedar Valley, and to identify spending patterns. The data collected will also be used to recommend promotional plans and marketing strategies. In summary, this research will provide information to help Waterloo and Cedar Falls to sustain and grow the tourism industry in the area.

C. Methodology

The methodology for this research utilized a number of techniques. Mail surveys 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 other cultural and special events. 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 mail out survey, its results, and implications, while a separate report, which accompanies this report, will focus on the collected intercept surveys.

D. Response Rates

A total of 502 surveys were mailed to individuals who had previously requested information from either the Waterloo or Cedar Falls tourism offices. The surveys were mailed during the months of May, June, and July of 2003. Of these mailed surveys, 237 (47.2 percent) were returned.

The selection process for the mailing list involved random selection, while maintaining the correct proportion between the Waterloo office and the Cedar Falls

office. For example, we made sure that the mailing list was made up of 50% from the Waterloo office and 50 % from the Cedar Falls office. This fact is shown in the percent of responses generated from each mailing list (Chart 1). As shown, 52% of the respondents who had requested information from Cedar Falls and 48% of the respondents had requested information from Waterloo.

Chart 1: Response Rate from Each Community's Mailing List

Where the Respondent had Requested Information From? (n = 236)

52%   48%

☐ Waterloo
■ Cedar Falls
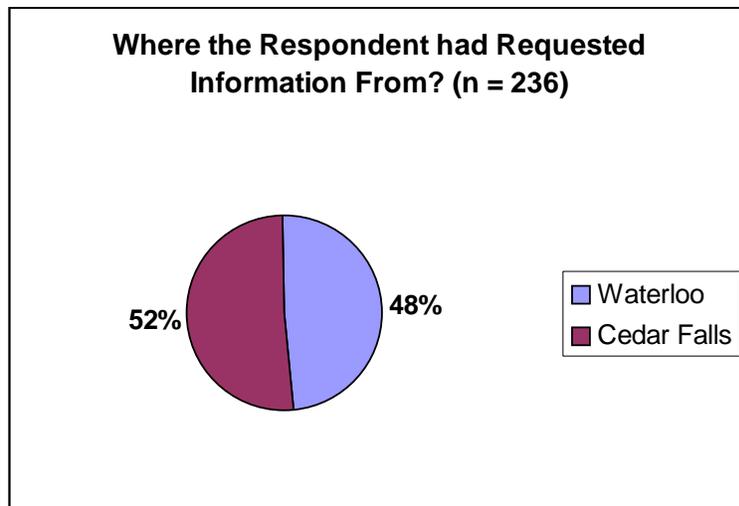
Source: Waterloo/Cedar Falls Ad Conversion Study '04 UNI-STEP

In addition, the sample was representative of the different types of requests made including internet, phone, mail, and magazine. The response rate for each type of request is shown in Chart 2.

Chart 2: Response Rate by Type of Request

Source Used to Request Information
(n = 229)
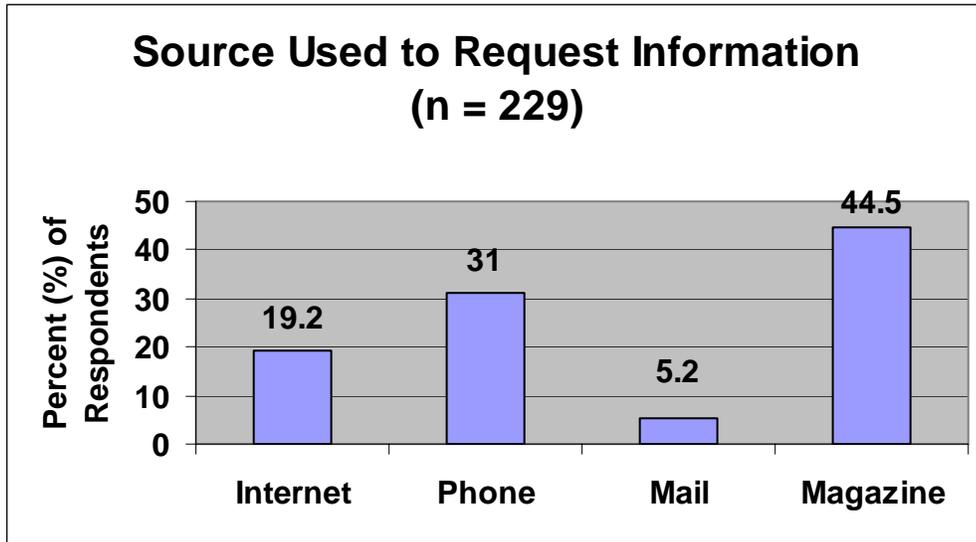
Source: Waterloo/Cedar Falls Ad Conversion Study '04 UNI-STEP

Chart 2 shows the largest group of respondents (44.5%) requested information through a magazine. This was followed by phone (31%), internet (19.2%), and mail (5.2%).

II.   Visitor Profile

A. Demographics

This portion of the survey was designed to gain a better understanding of the "typical" visitor to the Waterloo/Cedar Falls area. The questions asked included gender age, income, origin of the visitors, purpose of trip and with whom they were traveling. This type of information will assist the tourism offices in knowing who is visiting and where to target their marketing efforts.

Chart 3: Gender of Respondents
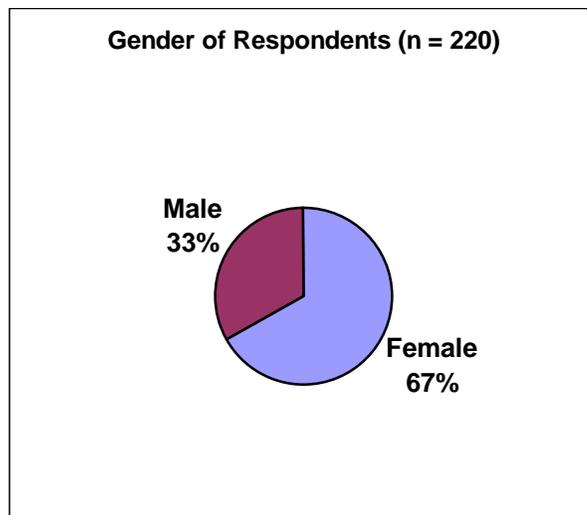
Source: Waterloo/Cedar Falls Ad Conversion Study '04 UNI-STEP

As shown in Chart 3, 67% of respondents were female, while 33% were male. This may simply indicate females were more willing or inclined to fill out the survey.

Chart 4: Age of Respondents

Age of Respondents (n = 152)

Age	% of Respondents
80 and above	0.7
70 to 79	8.5
60 to 69	27.6
50 to 59	16.5
40 to 49	26.3
30 to 39	15.1
20 to 29	3.3
10 to 19	2
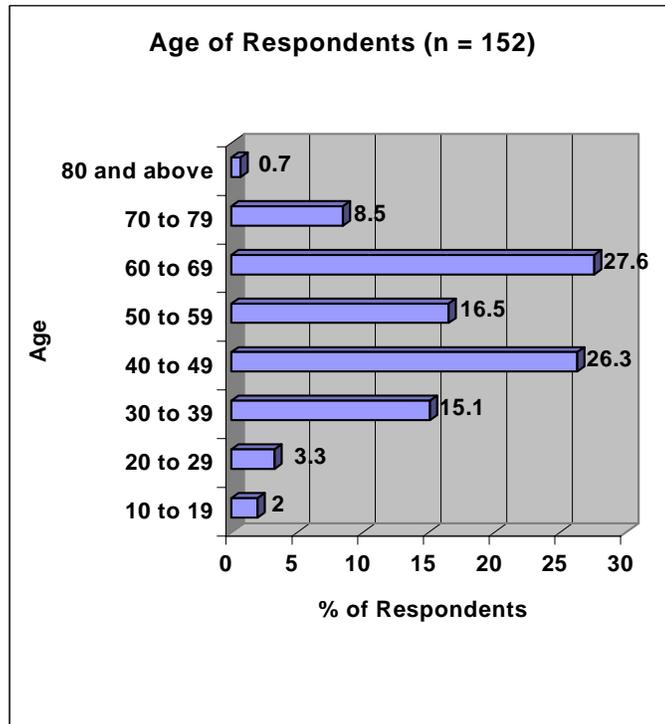
Source: Waterloo/Cedar Falls Ad Conversion Study '04 UNI-STEP

Chart 4 shows the respondents' age distribution. The majority of respondents were between the ages of 40 and 69 (70.4%). The single largest age group included individuals from the age of 60 to 69 (27.6%), but was closely followed by individuals between the ages of 40 and 49 (26.3%). The average age of respondents was 51 years old.

Chart 5: Income of Respondents

Income of Respondents (n = 188)

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

X-axis: 0, 10, 20, 30 — **% of Respondents**
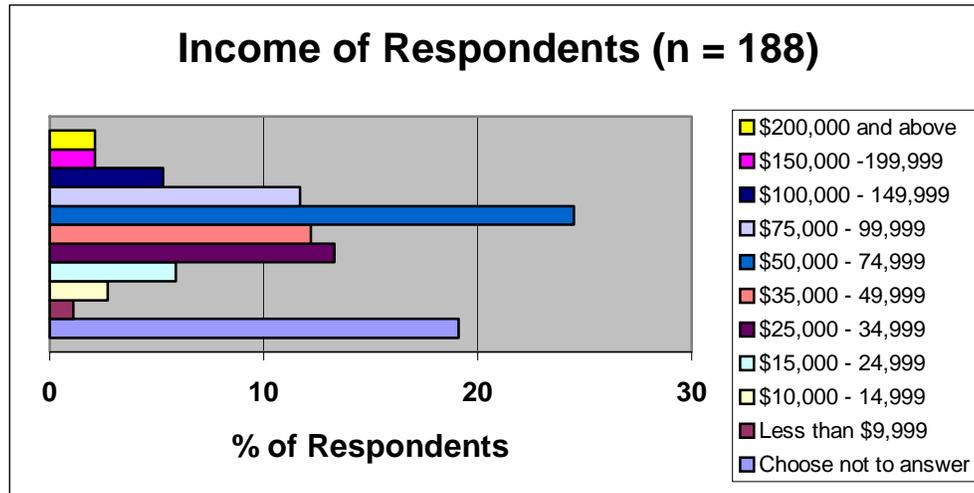
Source: Waterloo/Cedar Falls Ad Conversion Study '04 UNI-STEP

Income is an important demographic in identifying a visitor profile. The largest group had an income between $50,000 and $74,999 (24.5%). For this question respondents were given the option of "Choose not to Answer."   Those marking this response represented 19.1% of respondents.

The last portion of demographics is a visual representation of the general location where respondents live. As seen in Figure 1, a majority of the respondents are located in the Midwestern states. However, one can see that respondents were also located in other areas such as California, Washington, Colorado, Florida, and Pennsylvania.

Figure 1: Waterloo/Cedar Falls Mail Survey Respondents

Waterloo/Cedar Falls Survey Respondents

Cedar Falls Waterloo

★ Waterloo/Cedar Falls
● Respondents (zipcode)
□ States

0 50 100   200   300   400
Miles

Source:
HPELS Department, University of Northern Iowa, 2003
ESRI Data & Maps, 2002
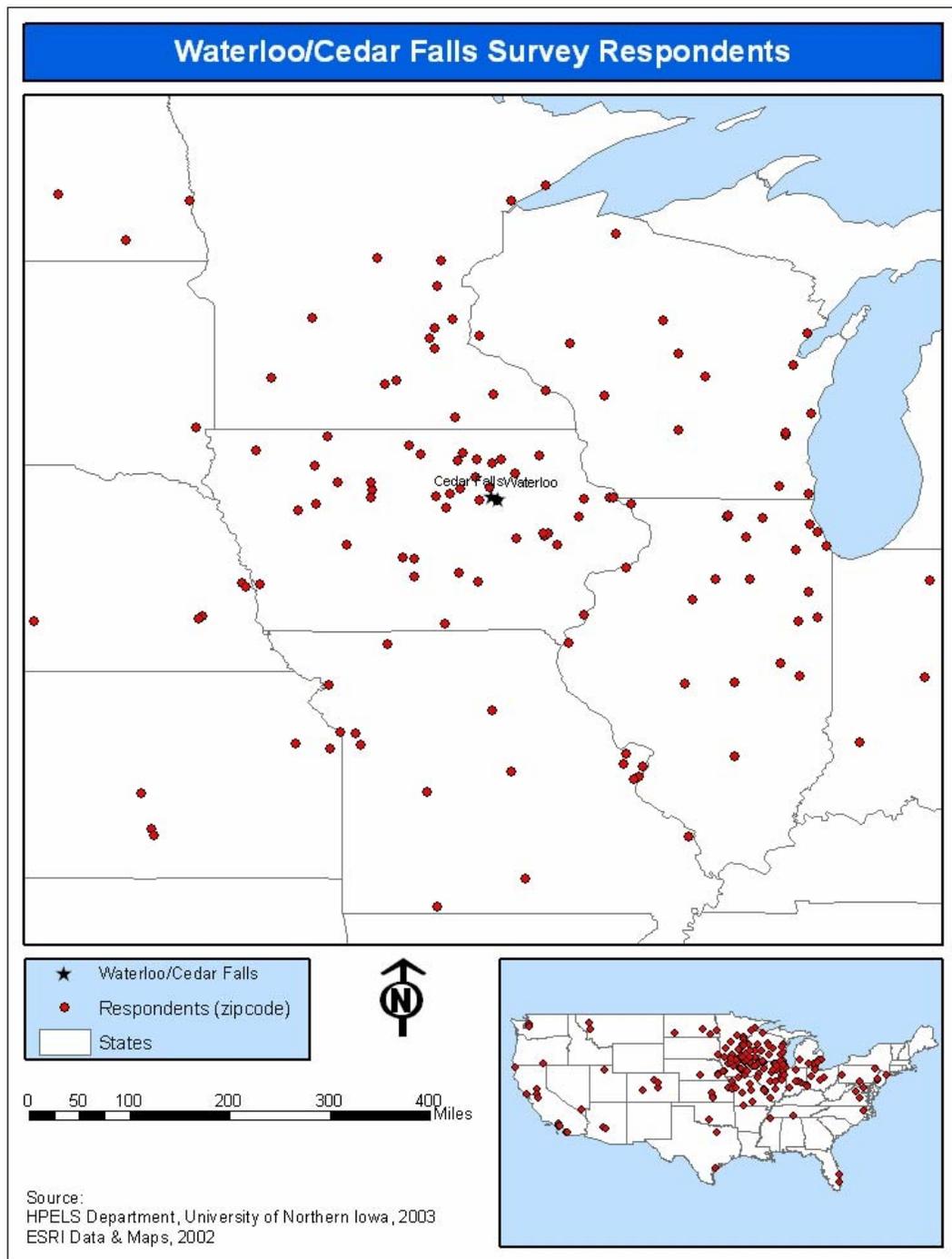
Source: Waterloo/Cedar Falls Ad Conversion Study '04 UNI-STEP

B. Travel Party Information

Along with the demographics of the respondents, it is also important to have information that describes the travel party, which includes the number of people together and their relationship. For the entire group of respondents, it was calculated that the median travel party size was 2 people.

Chart 6: Travel Party Size

Travel Party Size (n = 86)

% of Respondents — values: 9.3, 51.2, 14, 14, 5.8, 2.3, 3.6

# of Persons in Travel Party
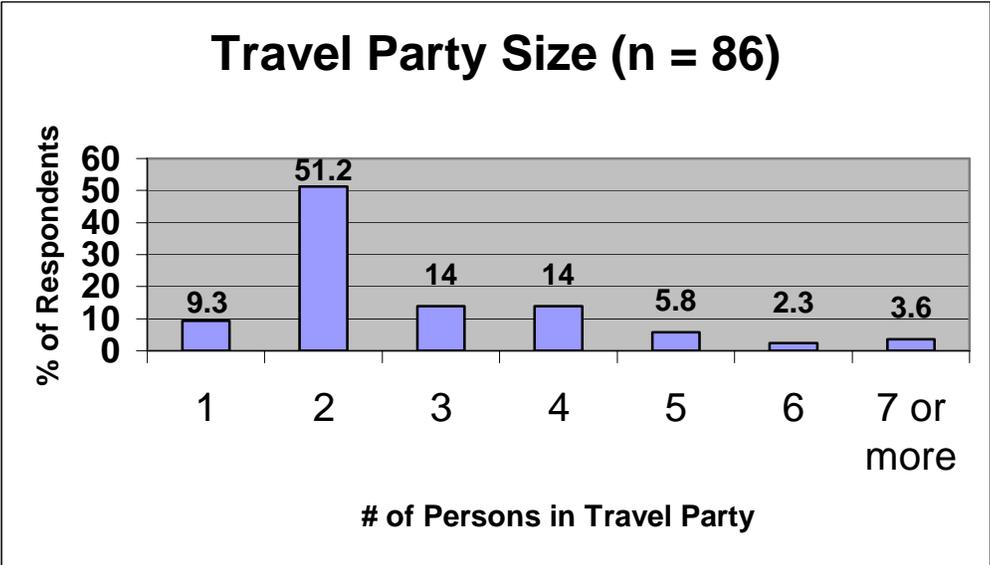
Source: Waterloo/Cedar Falls Ad Conversion Study '04 UNI-STEP

The majority of respondents (51.2%) had a travel party of 2 people. Travel parties of 3 people and 4 people each representing 14% of the respondents. A small percentage of the respondents (3.6%) traveled with large groups of over 7 people.

This data was further analyzed by the type of request to see if there were any differences by type of request for information.

Chart 7: Party Size by Type of Request

Party Size by Type of Request
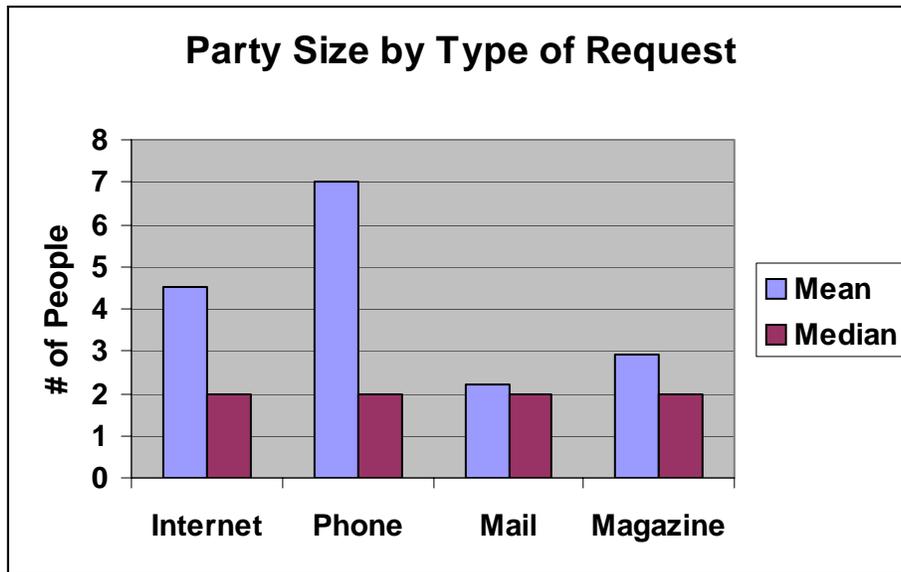
Source: Waterloo/Cedar Falls Ad Conversion Study '04 UNI-STEP

As chart 7 shows, the median travel party sizes among all types of requests was 2 people. There were differences between the mean scores in each group, but the mean scores can be greatly effected by outliers or extreme scores in the data set. For example, a few respondents recorded travel party sizes of 34, 62, and 100 people. These numbers are not typical and cause the means to be higher than normal. An Analysis of Variance was also ran to see if there was any significant difference between the type of requests and the party size. The result was that there was no significant difference (sig. = .629).

Chart 8: Who are you Traveling With?

Who are you Traveling With? (n = 106)

Category	% of Respondents
Your Family	68.9
Your Self	14.2
Other	10.4
Tour Group	1.9
High School Group	1.9
Sports Team	0.9
Grade School Group	0.9
Environmental Group	0.9
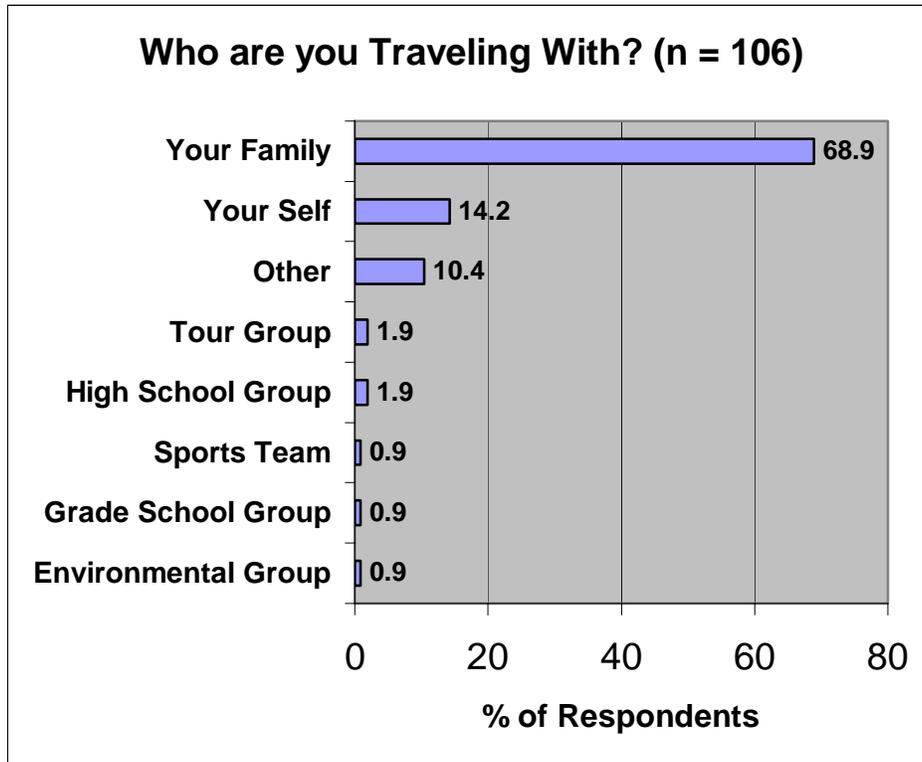
% of Respondents

Source: Waterloo/Cedar Falls Ad Conversion Study '04 UNI-STEP

Respondents were asked with whom they were traveling on their trip to Waterloo/Cedar Falls. The majority of respondents were traveling with their family (68.9%), while 14.2% traveled alone. A number of respondents (10.4%) selected the category "other," which included traveling with friends and co-workers

C. Main Purpose of Trip

Respondents were asked to select the main purpose of their trip from a list of business and pleasure purposes. Pleasure was the primary purpose of travel for a majority of the respondents (85%), while 15% of the respondents were traveling for business.

Chart 9: Business vs. Pleasure Travelers

Primary Purpose of Trip (n = 231)

Business
15%
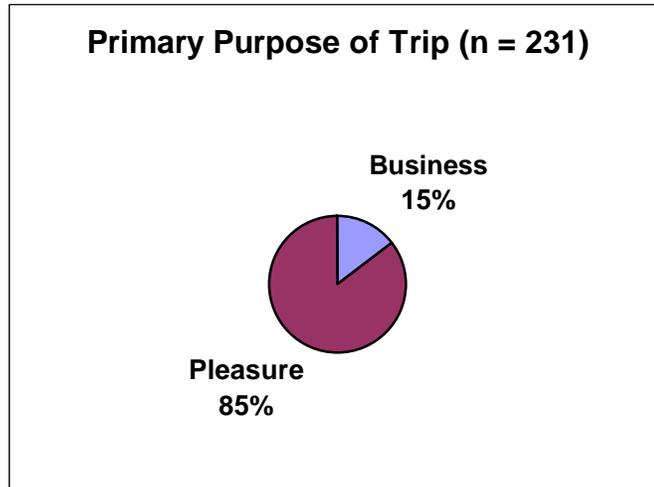
Pleasure
85%

Source: Waterloo/Cedar Falls Ad Conversion Study '04 UNI-STEP

There were 5 choices respondents could select under the business category and 17 choices under the pleasure category. The top 3 business purposes are listed in Table 1 and the top 8 pleasure purposes are listed in Table 2.

Table 1: Primary Purpose of Trip - "Business"

Business Primary Purposes	Percent (%) of Respondents
Other Business	10.8%
University Activities	2.2%
Attend a Conference	2.2%

Source: Waterloo/Cedar Falls Ad Conversion Study '04 UNI-STEP

Respondents traveling for business with 10.4% of the respondents most frequently selected "Other Business". Respondents also could identify the type of business in which they were participating. A number of respondents did not fill in this portion of the survey, but for those who did some of the most common responses included: John Deere, job interview, house hunting, visit UNI, and visit company facilities.

Table 2: Primary Purpose of Trip - "Pleasure"

Pleasure Primary Purposes	Percent (%) of Respondents
Visiting Friends and Relatives	17.3%
Shopping	10.4%
Other	10.4%
Dining	7.4%
Cedar Valley Nature Trails	6.5%
Culture/Museums	6.0%
Community Festival	4.3%
Antique Shopping	4.3%

Source: Waterloo/Cedar Falls Ad Conversion Study '04 UNI-STEP

Table 2 shows the primary purposes of those traveling for pleasure purposes. The top response was "visiting friends/relatives" with 17.3%, followed by "shopping" and "other" which both had 10.4% of respondents. Again, the "other" category had a space to write in responses and the most common responses were the jazz festival, reunions, bike trails, water park, state fair, and weddings.

D. Trip Planning

The survey addressed the extent to which respondents planned their routes and stops on their trip to Waterloo/Cedar Falls and how frequently they made recreational stops due to road signs.

Chart 10: Trip Planning
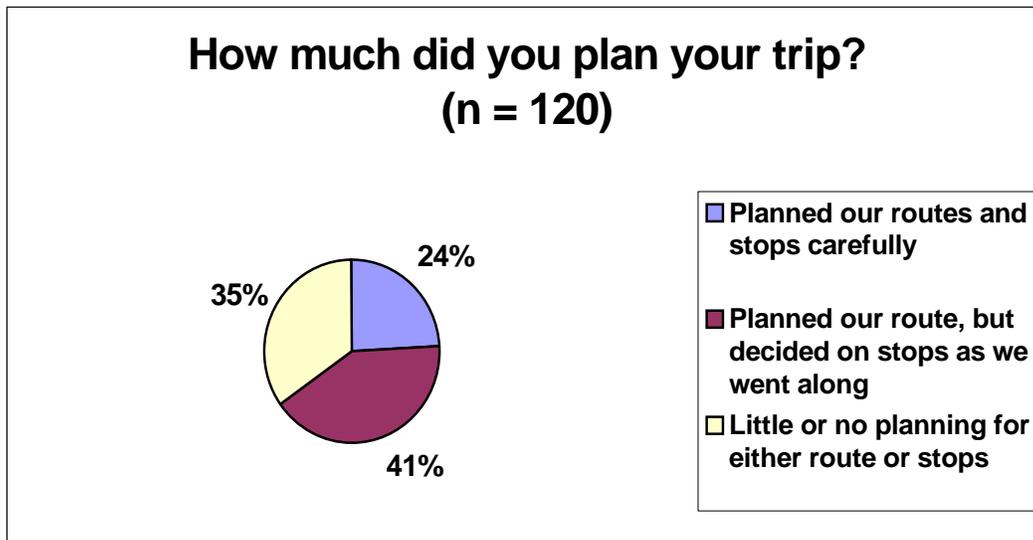
Source: Waterloo/Cedar Falls Ad Conversion Study '04   UNI-STEP

Chart 10 shows that trip planning was fairly evenly distributed among respondents. The largest portion of respondents reported that they planned their route, but decided on stops along the way (41%). This was followed by "little or no planning for either route or stops" (35 %) and "planned routes and stops carefully" (24%).

Chart 11 shows how frequently respondents said they made recreational stops along their trip due to road signs. Their options were frequently, occasionally, or none.

Chart 11: Recreational Stops Due to Road Signs

Recreational Stops Due to Road Signs (n = 102)

14%

42%

44%

- Frequently
- Occasionally
- None
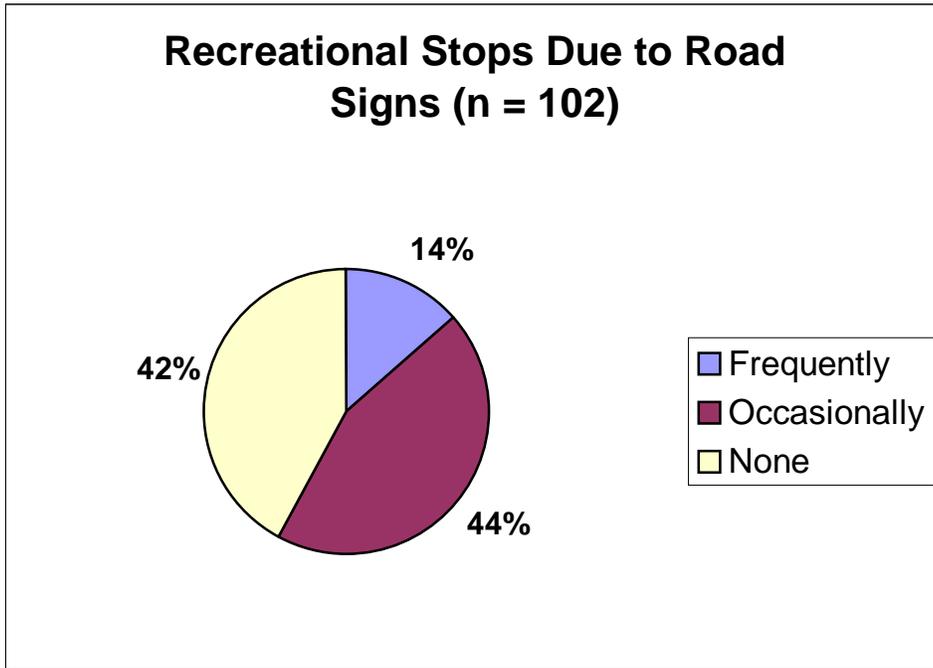
Source: Waterloo/Cedar Falls Ad Conversion Study '04   UNI-STEP

The largest group of respondents (44%) made occasional recreation stops due to road signs, which was closely followed by 42% of respondents who never made recreational stops due to road signs.

III. Travel Patterns

Understanding visitor travel patterns help the tourism industry to provide quality services. These travel patterns include previous visits to the area, number of visits in the pasts year, length/location of stay, month/day of arrival, trip destination, activities participated in, and type of transportation.

A. Previous Visits to the Area

Attracting new visitors to the area is a main objective for most visitors bureaus. It is also critical to give current visitors a reason to return again and again. The survey asked respondents if that had previously visited the Waterloo/Cedar Falls area.

Chart 12: Previous Visitation Pattern

Have you ever visited WL/CF before?
(n = 229)

48% 52%

Yes
No
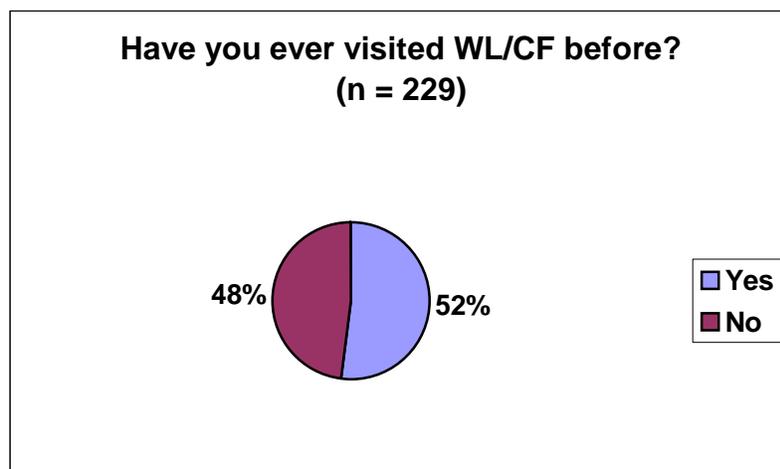
Source: Waterloo/Cedar Falls Ad Conversion Study '04 UNI-STEP

As shown in Chart 12, there is nearly an even distribution of repeat visitors to new or first time visitors. A majority of respondents had been the area before (52%), while 48% of respondents were new visitors. Half of the respondents were repeat visitors meaning they had visited before and may have reason to visit again. The percent of new visitors shows that the area is still attracting people who have never been to the area.

If respondents answered that they had been to the Waterloo/Cedar Falls area previously, they were asked to record approximately how many times they had visited in the past year.

Chart 13: Number of Visits in the Past Year
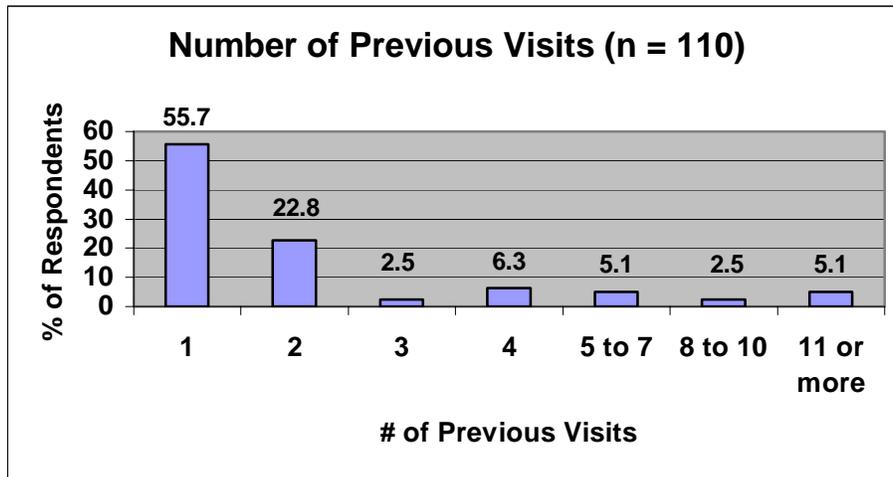
Source: Waterloo/Cedar Falls Ad Conversion Study '04 UNI-STEP

As is shown in Chart 13, the majority of respondents (55.7%) had only visited the Waterloo/Cedar Falls area 1 time previously that year. Over 12% of the respondents visit frequently, over 5 times during the past year.

B. Length/Location of Stay

Respondents were asked to indicate where they stayed on their most recent visit to the Waterloo/Cedar Falls area. Along with this information, they were asked how long they stayed in the area. This information can be used to determine what percent of visitors are actually staying overnight in the area and if they used lodging facilities.

Chart 14: Number of nights stayed in WL/CF

Number of nights stayed in WL/CF

# of Nights Stayed	Percentage (%)
6 or more	2.5
5	2.5
4	6.2
3	8.6
2	28.4
1	30.9
0	21
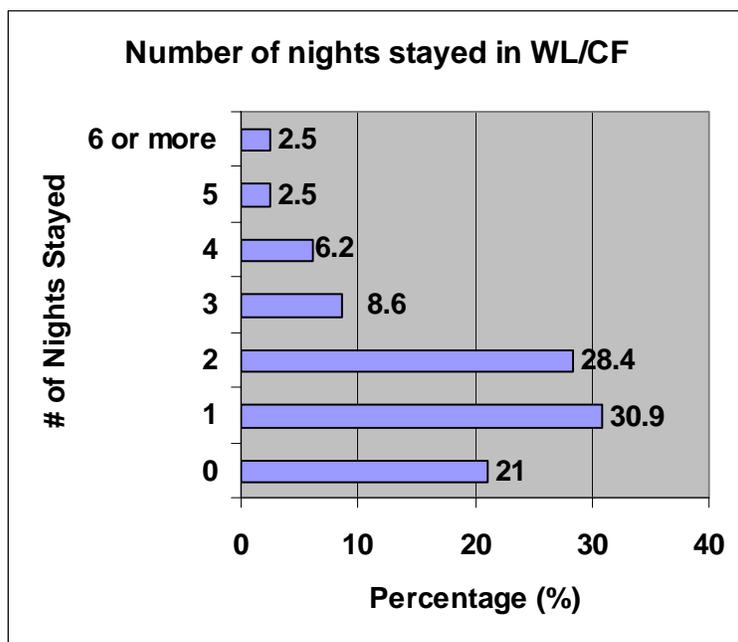
According to the data, the majority (59.3%) of respondents stayed 1 or 2 nights in the Waterloo/Cedar Falls area. Those who did not stay overnight represented 21% of the respondents.

To determine where respondents were staying while in the Waterloo/Cedar Falls area we provided them with an open space to record where they stayed. The responses were then grouped into similar categories. The top 3 responses were Hotel/Motel (61.4%), Relatives or Friends (14.3%), and a campground (8.6%)

C. Month/Day of Arrival

Respondents were asked to record the month and day of their arrival in the Cedar Valley. This data allowed us to determine the most common time for visitors to travel to the area

Chart 15: Month of Visitors Arrival

Month of Visitors Arrival

Month	% of Respondents
December	1.4
November	4.2
October	9.7
September	0
August	19.4
July	11.1
June	22.2
May	22.2
April	2.8
March	1.4
February	1.4
January	4.2

% of Respondents
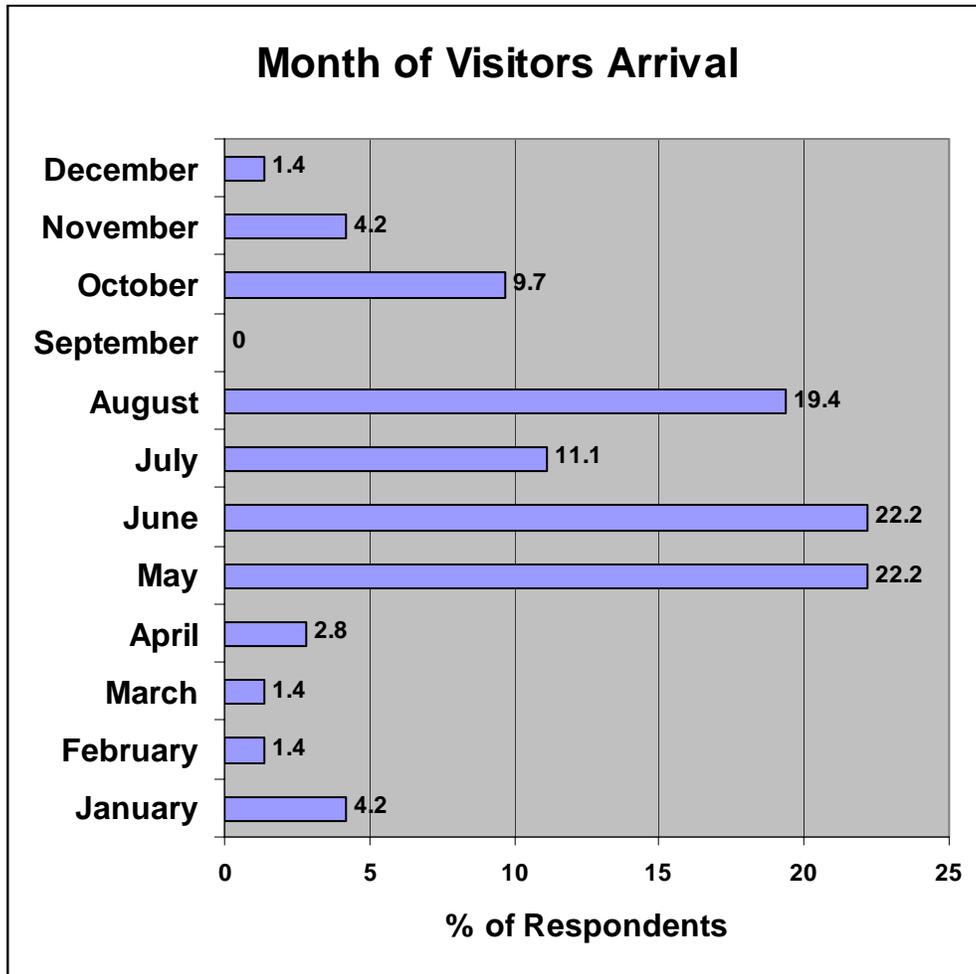
Source: Waterloo/Cedar Falls Ad Conversion Study '04 UNI-STEP

Chart 15 shows that the majority of visitors (74.9%) arrive in Waterloo/Cedar Falls between the months of May and August. The month of September had 0 responses and the months of February, March, and December tied with 1.4% of respondents.

Chart 16: Day of Visitors Arrival

Day of Visitors Arrival

Day	% of Respondents
Saturday	20.8
Friday	24.5
Thursday	13.2
Wednesday	18.9
Tuesday	7.5
Monday	7.5
Sunday	7.5
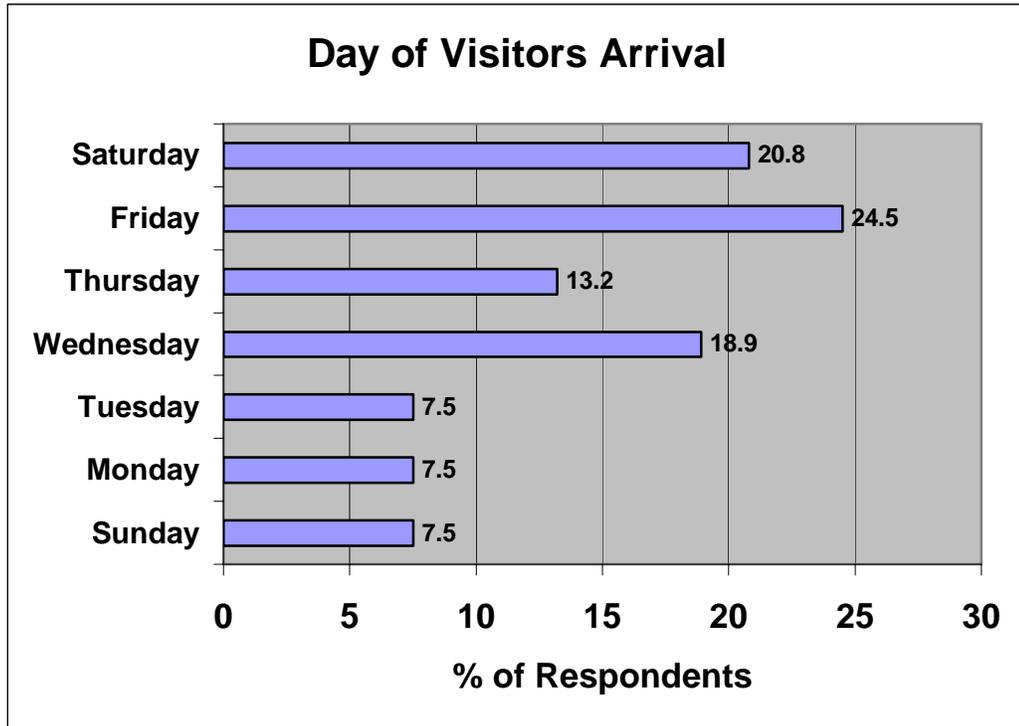
% of Respondents

Source: Waterloo/Cedar Falls Ad Conversion Study '04 UNI-STEP

From Chart 16, it is shown that the majority of visitors (45.3%) arrive in the Cedar Valley on either Friday or Saturday. However, nearly one third (32.1%) of the respondents arrived on a Wednesday or Thursday. The less frequent days of arrival were Sunday, Monday, and Tuesday, which each represented 7.5% of the respondents.

D. Trip Destination

Survey respondents were asked what their primary trip destination was. Respondent wrote in there own response. For this reason, responses varied and overlapped. The top 6 responses are listed in Table 3.

Table 3: Top Six Primary Trip Destinations (n = 90)

Primary Trip Destination	Percent (%) of Respondents
Waterloo/Cedar Falls	28.9%
Other Iowa Community	18.9%
Visiting Friends and Relatives	11.1%
John Deere	10%
UNI	6.7%
Traveling Through	4.4%

Source: Waterloo/Cedar Falls Ad Conversion Study '04 UNI-STEP

As might be expected, the largest group (over 45%) of respondents had a primary destination of Waterloo/Cedar Falls, which includes John Deere and UNI. However, the next largest group identified was "Other Iowa Communities" (18.9%). The communities mentioned included Dubuque, Waverly, Fredericksburg, Davenport, Independence, Cresco, Cedar Rapids, Pella, and Des Moines.

E. Activities Participated In

Another area of interest was what activities the respondents participated in while in the Waterloo/Cedar Falls area. The survey included 17 different activities and Table 4 lists the top ten responses selected by the respondents.

Table 4: Activities Participated In

Activities Participated In	Percent (%) of Respondents
Dining	21.8%
Shopping	16.8%
Socializing	13.0%
Quiet Relaxation	12.7%
Other	8.9%
Cultural	6.0%
Bicycling	5.4%
Performing Arts	4.4%
Hiking	3.8%
Hunting	1.6%

Source: Waterloo/Cedar Falls Ad Conversion Study '04 UNI-STEP

As seen in Table 4, the activities most commonly participated in were dining

(21.8%) and shopping (16.8%). These activities are two of the most typical visitor

activities, so the fact that they top the list is not surprising. Socializing (13%), quiet

relaxation (12.7%), and other (8.9%) followed these activities.

F. Transportation

Respondents were asked what form of transportation they used to get to Waterloo/Cedar Falls and what form of transportation they used while in Waterloo/Cedar Falls in order to provide appropriate transportation services.

Chart 17: Type of Transportation to WL/CF
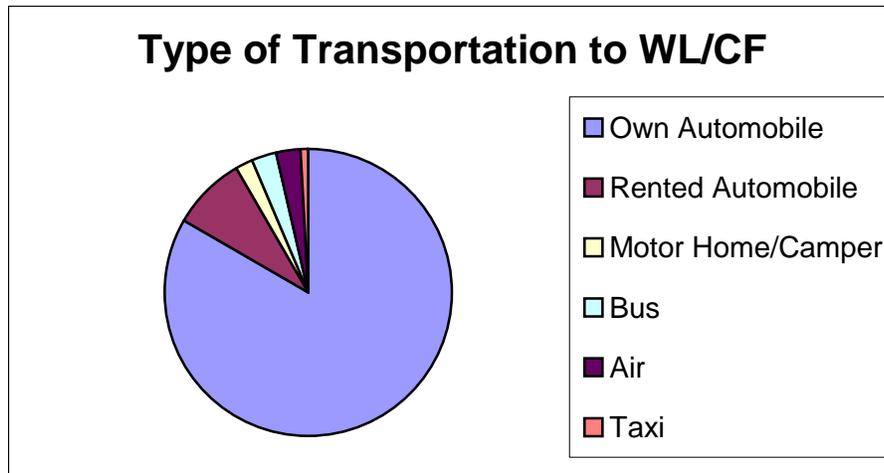
Source: Waterloo/Cedar Falls Ad Conversion Study '04 UNI-STEP

Chart 18: Type of Transportation Within WL/CF
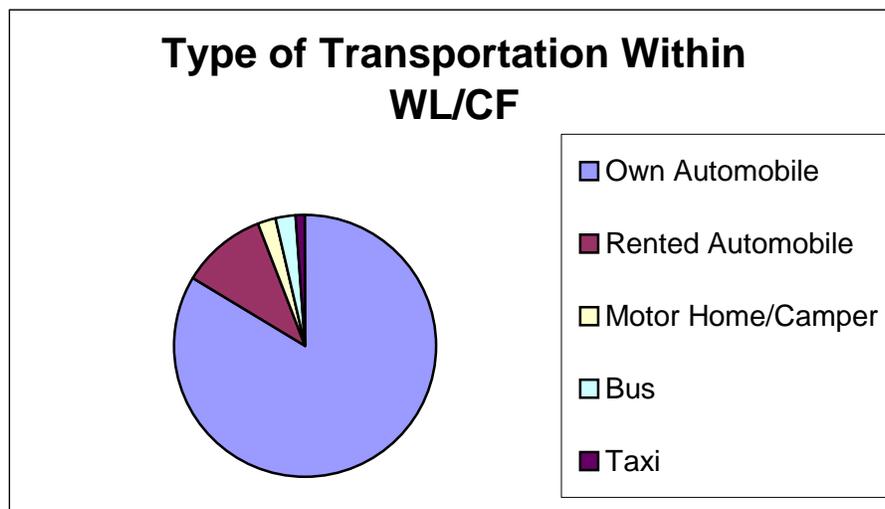
Source: Waterloo/Cedar Falls Ad Conversion Study '04 UNI-STEP

Chart 17 and 18 show very little differences between respondents transportation to and within Waterloo/Cedar Falls. For each the majority of respondents traveled in their own automobile (83.3% traveling to WL/CF and 83.7% traveling within WL/CF). A small number of respondents reported using the bus to get around within Waterloo/Cedar Falls.

IV.   Spending Patterns

Collecting data on spending patterns contributes to projecting the economic contribution to the region. The survey addressed spending patterns of respondents on their trip to the Cedar Valley. Respondents were asked to report spending under 6 categories including lodging, restaurant/bar, grocery/convenience store, motor vehicle, recreation and entertainment, and other expenses.

Table 5: Mean, Median, Total Spending per Party

Spending Categories	Mean	Median	Total
Lodging	373.57	150	19,052
Restaurant/bar	103.55	50	6,938
Grocery/ Convenience Store	32.03	20	929
Motor Vehicle	74.32	30	4,385
Recreation/ Entertainment	100.19	50	2,605
All other items	80.31	50	3,005
Total Spending	763.97	350	36,914

Source: Waterloo/Cedar Falls Ad Conversion Study '04 UNI-STEP

A. Lodging

Chart 19: Lodging Expenditures

Lodging Expenditures (n = 51)

% of Respondents vs *Amount Spent ($)*
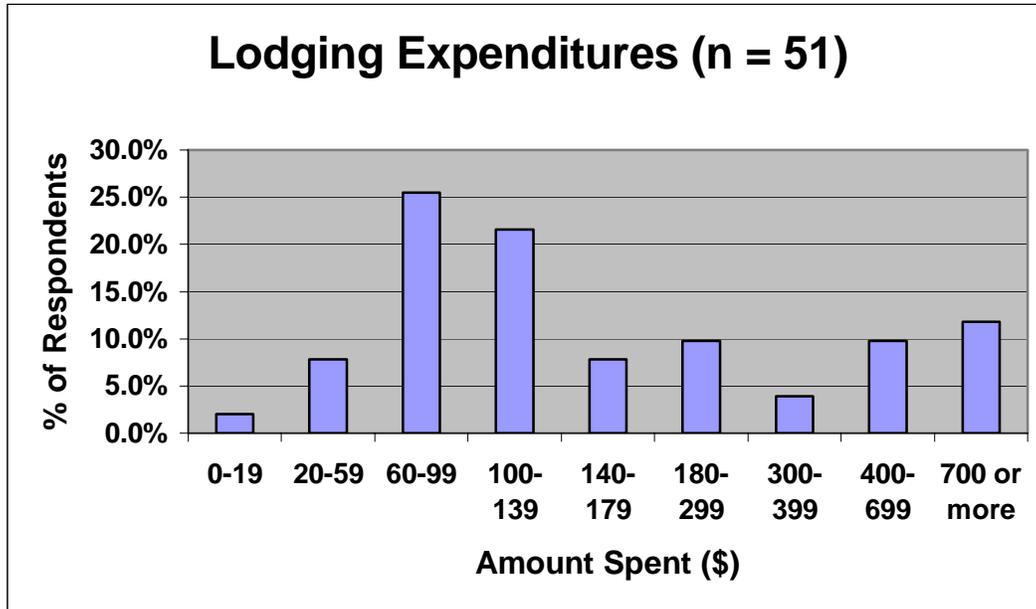
Chart 19 shows that the largest percent of respondents (47.1%) spent between $60 and $139 on lodging. This corresponds to the data on length of stay in the area, most respondents staying one night. Also be note that 11.8% of respondents spent $700 or more on lodging. Most likely, this can be explained by visitors who stayed an extended amount of time in the area on business or vacation.

B. Restaurant

Chart 20: Restaurant Expenditures
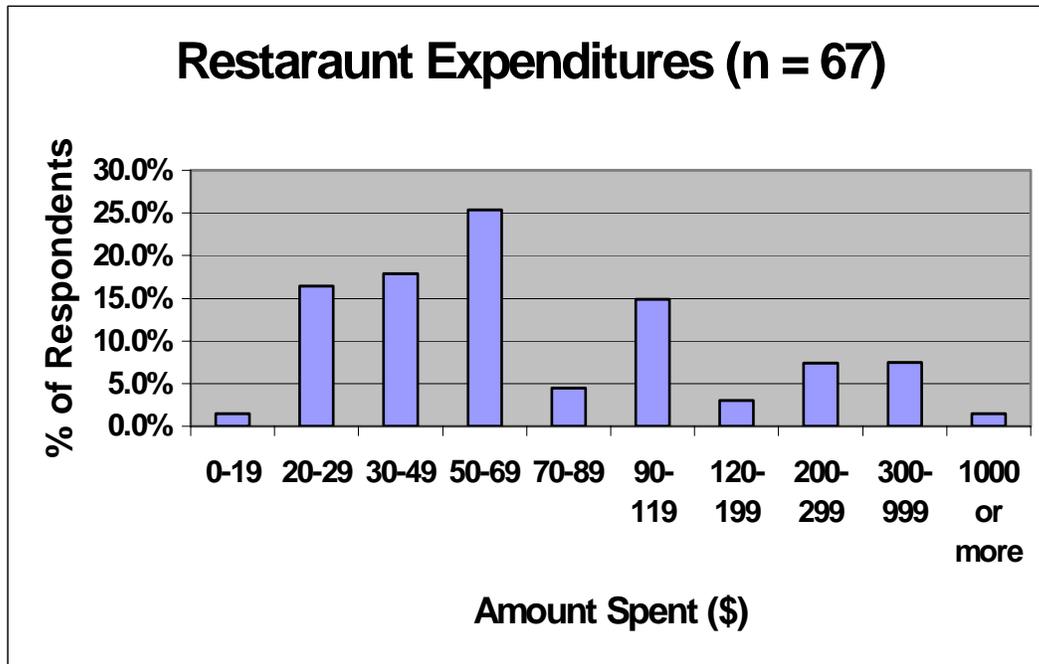
Source: Waterloo/Cedar Falls Ad Conversion Study '04 UNI-STEP

Respondents were asked to record the amount of money they spent in restaurants/bars. The largest group in this category (25.4%) spent between $50 and $69 on restaurant meals and drinks. The majority of respondents (61.2%) spent $69 or less on meals and drinks. On the other end of the scale, only 1.5% of respondents reported spending of $1000 or more.

C. Grocery/Convenience Stores

Chart 21: Grocery/Convenience Store Expenditures

Grocery/Convenience Store Expenditures (n = 29)
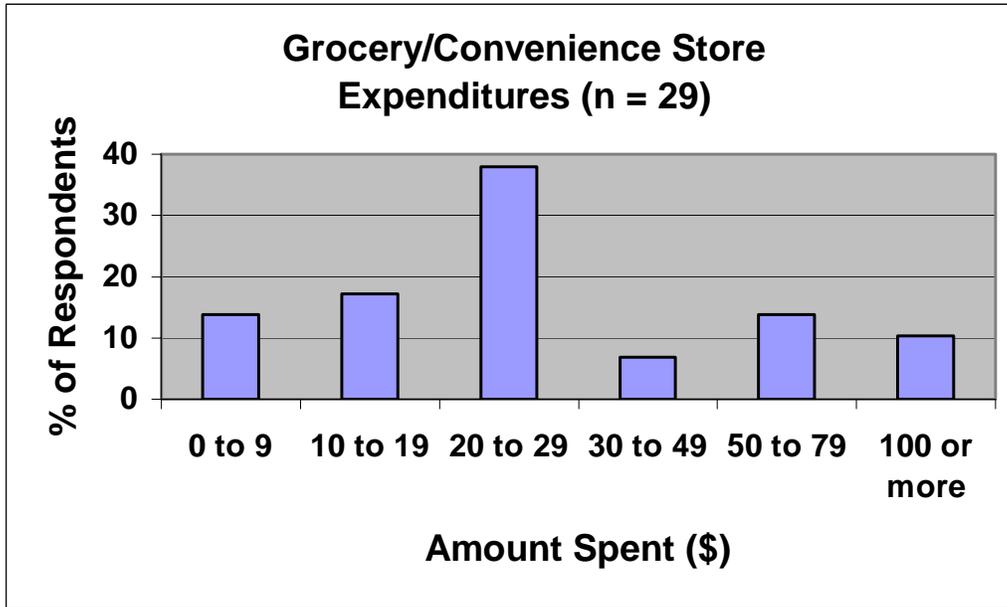
Source: Waterloo/Cedar Falls Ad Conversion Study '04 UNI-STEP

The next section of spending patterns asked respondents how much they spent on grocery or convenience store purchases. Between $20 and $29 was the most common (38%) response. Thirty one percent of the respondents spent from $0 - $19.

D. Motor Vehicle

Chart 22: Motor Vehicle Expenditures

Motor Vehicle Expenditures (n = 59)
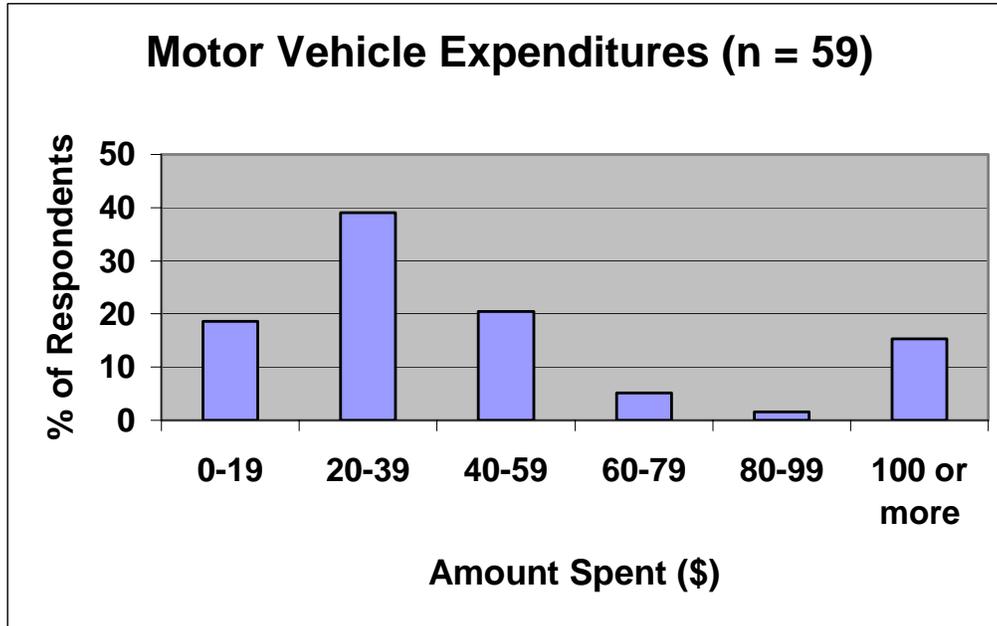
Source: Waterloo/Cedar Falls Ad Conversion Study '04 UNI-STEP

Respondents were next asked to record the amount spent on motor vehicle expenses. For this category the most common response (39%) was between $20 and $39. Just over 20% of the respondents spent from $40 - $59 on motor vehicle expenses while 15.3% spent $100 or more.

E. Recreation and Entertainment

Chart 23: Recreation and Entertainment Expenditures
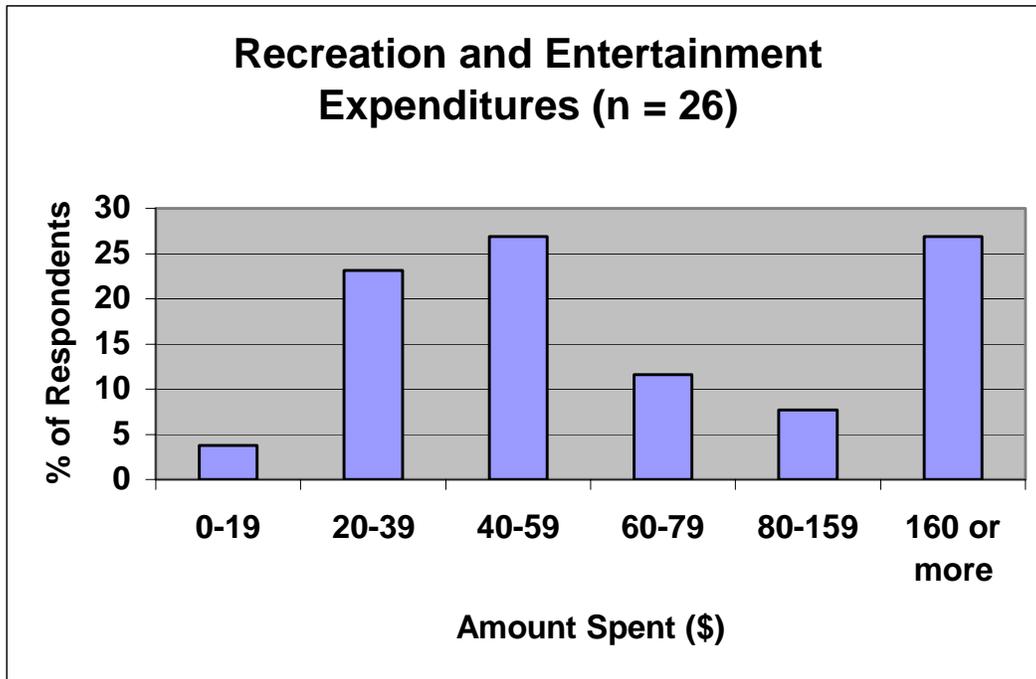
Recreation and Entertainment Expenditures (n = 26)

Source: Waterloo/Cedar Falls Ad Conversion Study '04 UNI-STEP

Respondents were also asked to report expenditures on recreation and entertainment. Chart 23 illustrates that nearly 27% of the respondents spent $160 or more on recreation and entertainment, while a majority of respondents (50%) spent between $20 and $59.

F. Other Expenditures

Chart 24: Other Expenditures

Other Expenditures (n = 37)
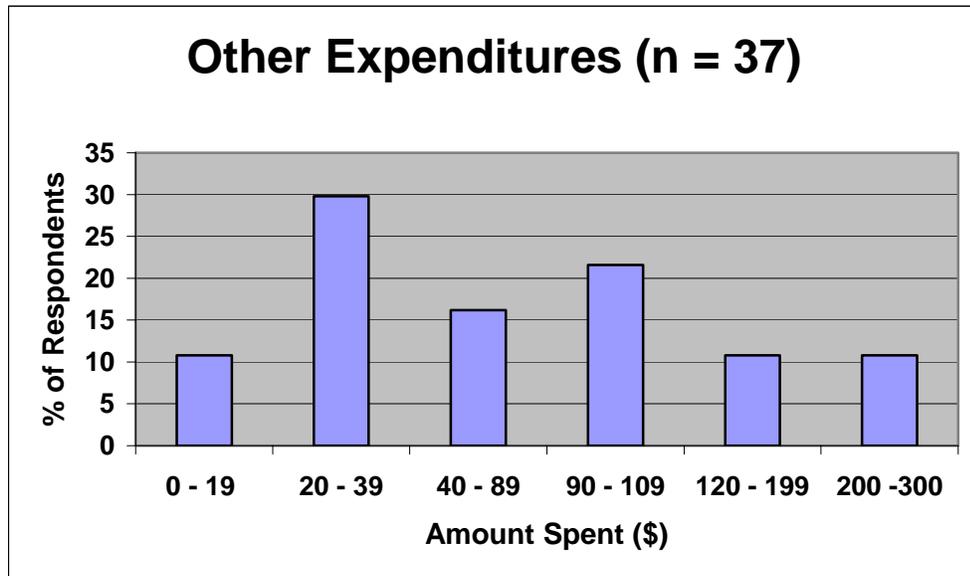
Source: Waterloo/Cedar Falls Ad Conversion Study '04 UNI-STEP

The category of "other" expenditures included such things as souvenirs, film, and/or clothes. Chart 24 shows that 29.8% of the respondents reported spending from $20 - $39 on "other" expenditures followed by those who spent from $90 - $109 with 21.6% of the respondents.

G. Overall Expenditures

Chart 25: Total Trip Expenditures

Total Trip Expenditures (n = 82)
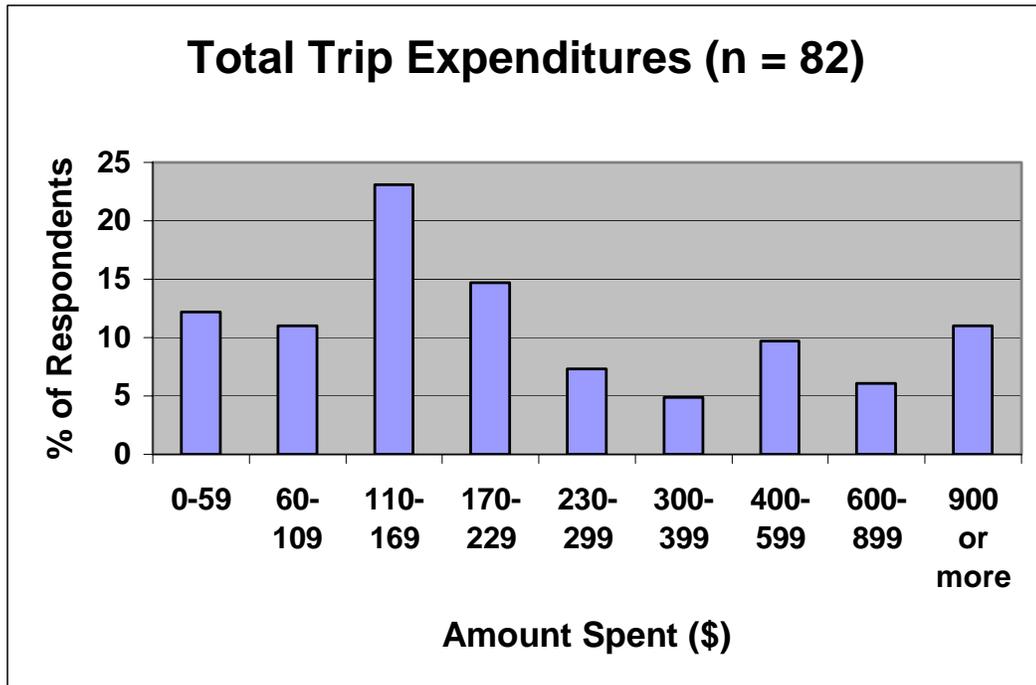
To summarize visitor expenditures, Chart 25 shows the total amount spent by respondents. The largest group (23.1%) spent between $110 and $169 on their trip to the Cedar Valley. The mean total amount spent was $450 and the median total amount spent was $170. The reason for reporting both of these numbers is because the mean can be greatly affected by outliers or extreme scores in the data set. In many cases the median is a much more realistic amount to look at.

V. Information Seeking/Advertisement

A. Request for Travel Information

Information seeking patterns are important to understand when analyzing advertisement effectiveness and spending. It allows for the ability to show exactly which forms of advertisements are generating information requests and also generating visitors. This analysis includes how and when respondents requested travel information.

Visitors used different methods to request information, including magazine, mail, phone, and internet. The different methods of request were analyzed by where the information was requested from. Again, the survey sample was drawn evenly between Waterloo and Cedar Falls. Chart 26 shows the distribution of request methods by city.

Chart 26: Type of Request by Waterloo/Cedar Falls

Type of Request by Where the Information was Requested From
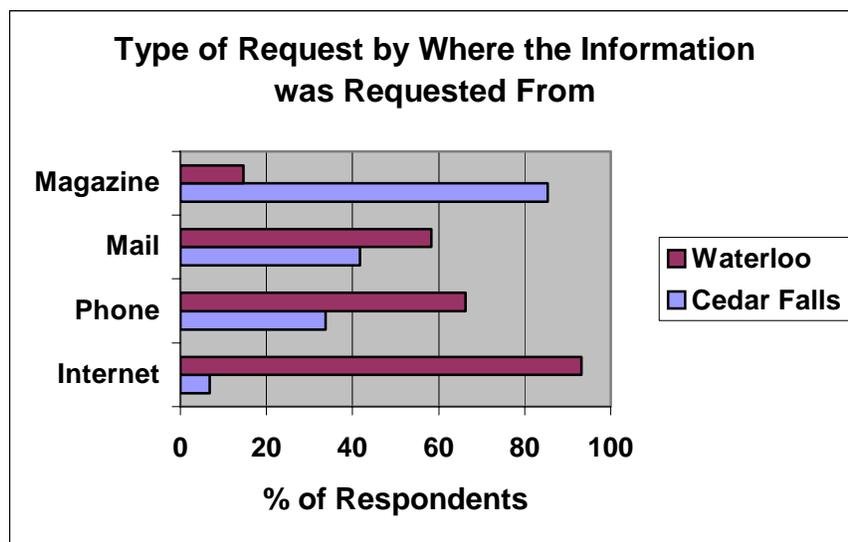
Source: Waterloo/Cedar Falls Ad Conversion Study '04 UNI-STEP

Cedar Falls received a far greater percent of "Magazine" requests (85.3%) compared to Waterloo who received 14.7% of the requests. This result can be largely explained due to the fact that Waterloo and Cedar Falls advertise cooperatively in the magazines. For this reason the take turns in receiving the information requests that come

from the magazines. The sampling timeframe used in this study fell during the year that

Cedar Falls was receiving the requests.

Waterloo had a greater percent of "Internet" requests (93.2%) compared to Cedar

Falls which received 6.8% of the "Internet" requests.

Chart 27: Was Information Requested Before Visiting WL/CF?

Was Information Requested Before Visiting WL/CF?

29%

71%

☐ Yes
☐ No
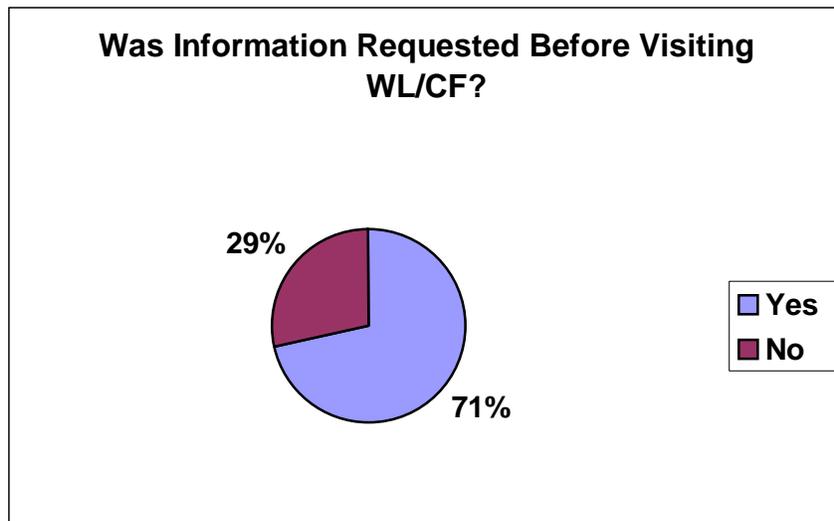
Source: Waterloo/Cedar Falls Ad Conversion Study '04 UNI-STEP

A majority of respondents (71%) requested their travel information before visiting

the area, as anticipated. However, 29% of the respondents did not request travel

information before their trip. This could suggest that they visited and requested

information for a possible return visit.

The section of the survey regarding respondents' information seeking behavior also asked them whether or not they remember receiving the information they requested.

Chart 28: Do Respondents Remember Receiving Information?

After Requesting Information, Do You Remember Recieving It? (n=227)

10%

90%

Yes
No
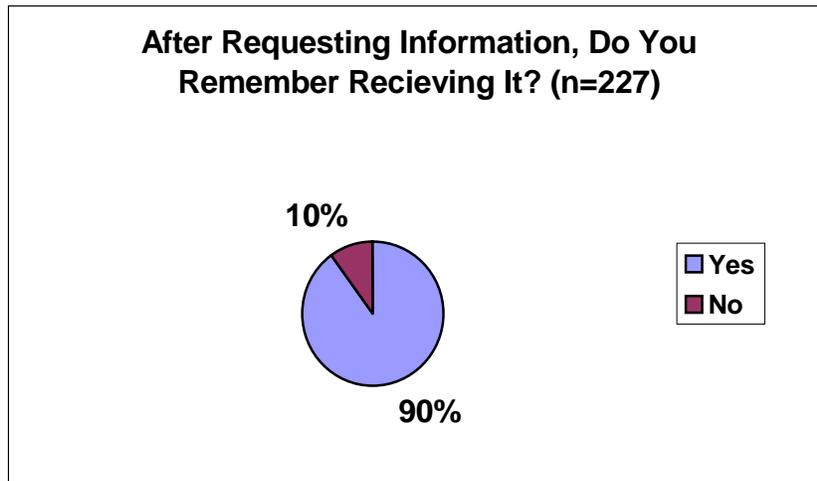
Source: Waterloo/Cedar Falls Ad Conversion Study '04 UNI-STEP

As shown in Chart 28, 90% of respondents did remember receiving the information, while only 10% did not.

Since the sample was drawn from a list of individuals that had requested information from either Waterloo or Cedar Falls, the survey asked respondents the purpose for requesting information. The options included wanting up-to-date information about WL/CF, planning a trip to Iowa, planning a trip to WL/CF, looking for a job, or other. Respondents could select more than one response, explains why the percentages in Chart 29 exceed 100%.

Chart 29: Purpose of Requesting Information

Purpose of Requesting Information

Category	% of Respondents
Looking for a Job	2.5
Other	27.4
Planning a Trip to Iowa	33.8
Wanted Up-to-date Info. On WL/CF	34.2
Planning a Trip to WL/CF	35.4
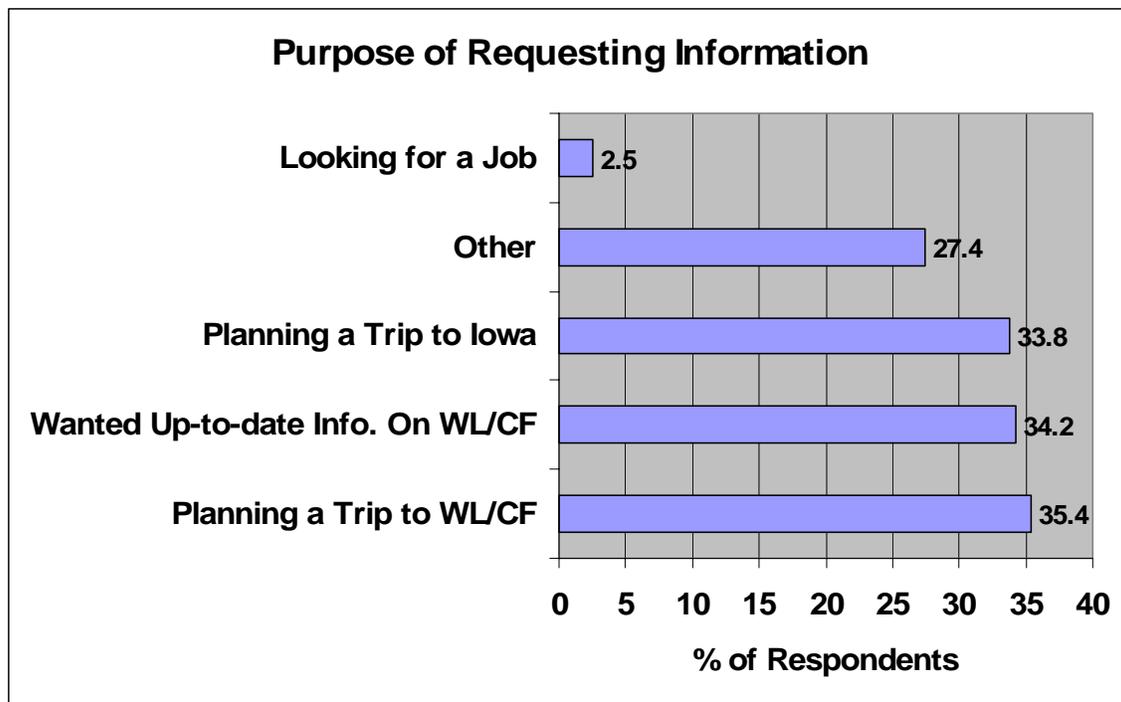
Chart 29 shows that the most frequent response was "planning a trip to Waterloo/Cedar Falls" (35.4%), followed by "wanted up-to-date information on Waterloo/Cedar Falls" (34.2%), and "planning a trip to Iowa" (33.8%).

B. Information/Advertisement Sources Used

Visitors access information through a range of sources while traveling. The survey addressed the local sources of information, advertisements viewed and what types of information were most useful to respondents.

The list of advertisement sources that the respondents select from was based on the specific types of advertisement that Waterloo/Cedar Falls tourism offices use. A large percent of respondents (37.8%) replied "I saw No Advertisement." This was followed by Magazine (18.5%), Travel Publication (13.3%), "I saw advertisement, but can't recall where" (10.4%), Newspaper (7.4%), and Other (3.7%). Responses that were reported in the "Other" category were the yellow pages, horse show information, welcome center, and a TV commercial.

Chart 30: Types of Advertisements Viewed

What Type of Advertisment did you see Before Your Trip to WL/CF?

Category	Percent
I saw no advertisment	37.8
Magazine	18.5
Travel Publication	13.3
I saw advertisment, but can't recall where	10.4
Website	8.9
Newspaper	7.4
Other	3.7

Percent (%) of Respondents
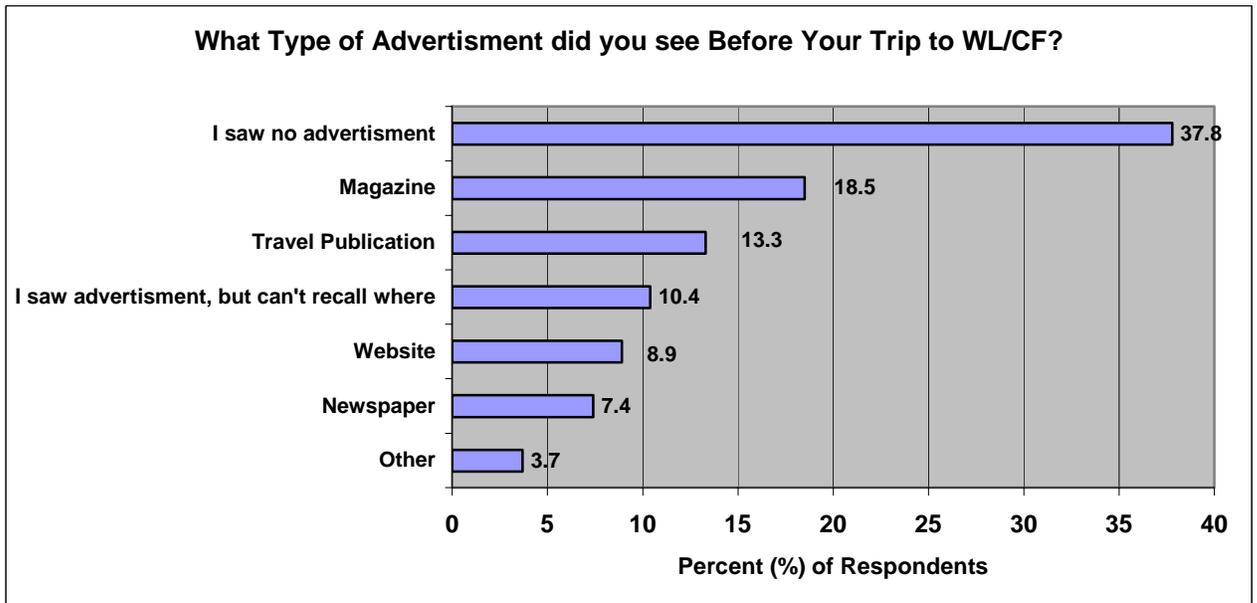
Source: Waterloo/Cedar Falls Ad Conversion Study '04 UNI-STEP

C. Local Sources of Information

Once visitors arrive in the Cedar Valley, it is important they have access to additional travel information. Many different locations in the communities can assist in providing additional information. Respondents were asked what local sources of information were used during their travels.

Chart 31: Local Sources of Information Used
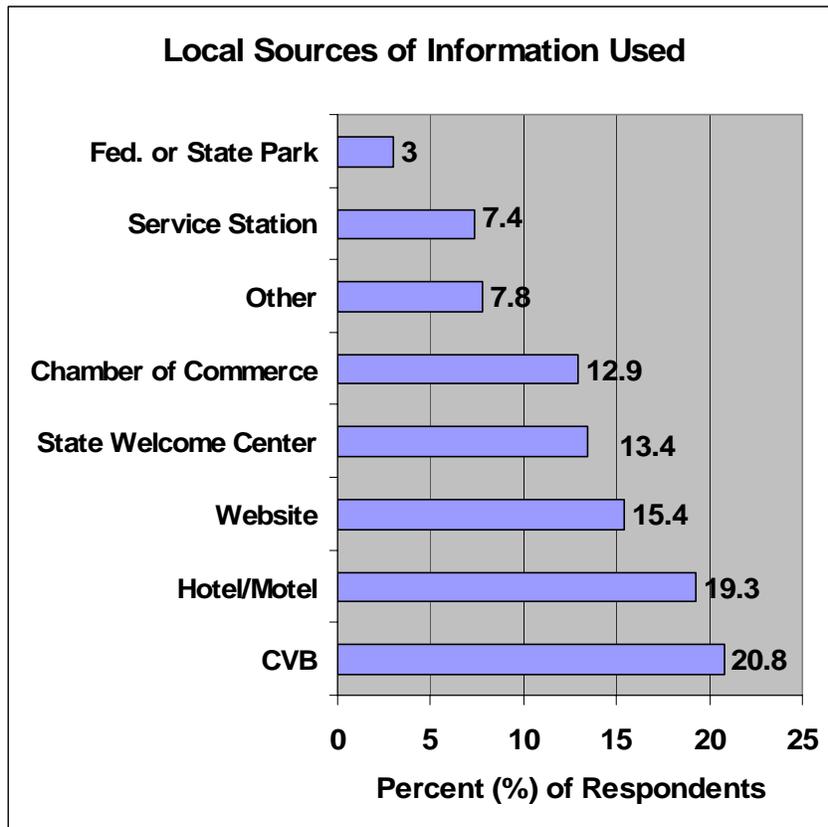
Source: Waterloo/Cedar Falls Ad Conversion Study '04 UNI-STEP

Chart 31 shows that the most commonly used local source of information was the convention and visitors bureaus with 20.8%. Hotel/motel (19.3%), website (15.4%), and state welcome centers (13.4%) followed this category. With this information, the tourism offices can make sure that these locations are well equipped with proper travel information to assist visitors.

D. Usefulness of Information

Respondents were asked whether or not the information received was useful.

Chart 32: Usefulness of Information
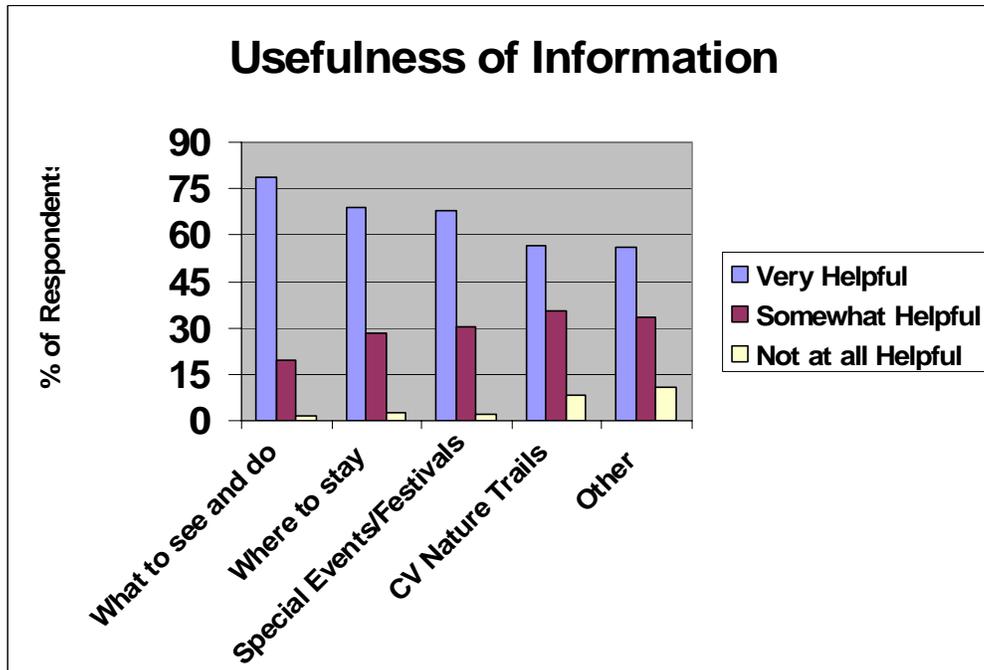
Source: Waterloo/Cedar Falls Ad Conversion Study '04 UNI-STEP

Chart 32 shows that respondents generally found the information very helpful. "What to see and do" led the categories with 78.8% of the respondents saying the information was very helpful.

VI. Marketing and Promotional Implications

This section focuses on the marketing and promotional impications of the data that was collected. The data analyses enables the Cedar Falls and Waterloo Tourism Offices to understand the population they currently reach and what results their current advertising practices are producing. To do this we use a type of statistics called a "crosstabulation." This statistic is able to take two different questions and analyze them together to determine what, if any, relationship the two questions have.

A. Trip Spending by Type of Request

The first crosstabulation that was run took the type of request and the total spending of the respondents to see what the mean and median amount spent was. This was done to see which type of advertisement brought in the most visitor expenditures. The mean and median are both reported to gain a more realistic picture of the data. In some cases the extreme outliers may have reported an unusually huge amount of money spent, which would skew the mean of the group to be much larger than it really is. For this reason we also report the median amount spent, which is the mid-point of the data.

Chart 33: Total Spending by Type of Request
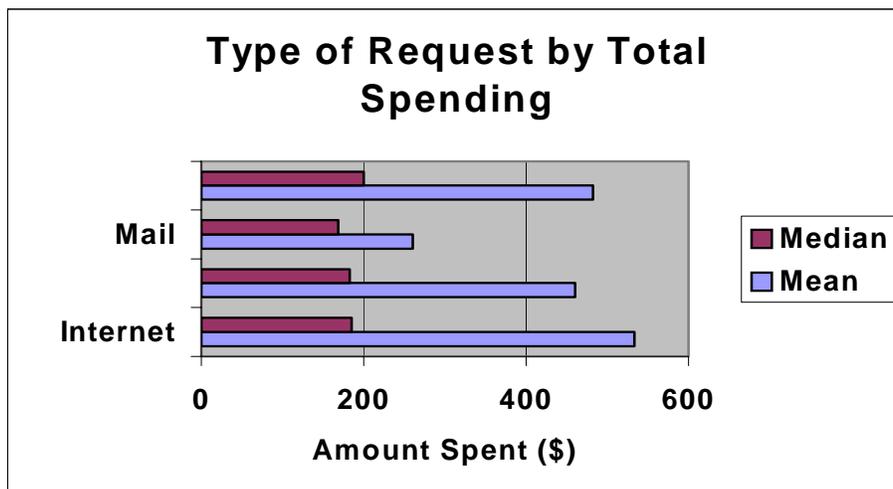
Source: Waterloo/Cedar Falls Ad Conversion Study '04 UNI-STEP

From the data presented in Chart 33, it is evident that there is a difference between the mean and median scores for each type of request. The mean amounts ranged from $260 to $534, while the median amounts ranged from $169 to $200. In this situation the mean amounts were more than likely skewed by a few respondents who reported high expenditures.

When looking at the median amounts spent by the type of request, it is shown that the "magazine" requests reported a slightly higher amount of total spending ($200). On the lower end, "mail" requests reported a slightly lower amount of total spending ($169), a difference of only $31.00.

B. Trip Spending by Type of Advertisement

In this section we take a deeper look into the different types of advertisements and what the difference is in the amount of spending. This is a crosstabulation that took into account each of the spending categories as well as the total amount spent. That information was examined by type of advertisement viewed or used. Again, both the mean and median amount spent are reported for accuracy.

Table 5: Trip Spending by Type of Advertisement

	Lodging	Restaurant	Grocery	Motor Vehicle	Recreation Entertain.	Total Spending
Website						
Mean	$355	$90	$48	$38	$110	$581
Median	**$150**	$50	**$40**	**$30**	$20	**$290**
Newspaper						
Mean	$81	$55	$20	$28	$42	$183
Median	$70	$50	$20	$15	$37	**$155**
Travel Public.						
Mean	$193	$143	$40	$55	$123	$394
Median	$109	**$100**	$30	$25	**$60**	**$165**
Magazine						
Mean	$282	$88	$38	$63	$74	$385
Median	**$150**	$55	$30	$25	$40	**$230**
Other						
Mean	$129	$71	$23	$35	$33	$286
Median	$100	$55	$23	$25	$25	**$185**
Cannot Recall						
Mean	$118	$178	$20	$83	$130	$263
Median	$100	$35	$20	$20	$50	**$215**
Saw No Ads						
Mean	$362	$93	$24	$114	$58	$403
Median	$145	$60	$20	**$30**	$50	**$155**

Source: Waterloo/Cedar Falls Ad Conversion Study '04 UNI-STEP

Table 5 includes data for each spending category. The highest median amount spent in each of the categories is in **bold**. Those who viewed advertisements via the "website" had the highest median spending in three categories and had the highest

median expenditure for "total amount spent." The "travel publication" viewers had the highest median spending in the "restaurant" category ($100) and the "recreation/ entertainment" category ($60). Those who viewed "magazine" advertisements tied for the highest median spent on "lodging" with "website" viewers, both had a median of $150.00.

C. Traveler Characteristics by Type of Advertisement

In this section of the report we have ran some crosstabulations with traveler characteristics and what type of advertisement they viewed. This data will give more specific characteristics of who is viewing what types of advertisements. In Chart 34, the first time and repeat visitors are broken down into the advertisement source.

Chart 34: First Time Visitors by Type of Advertisement In Percent

First Time Visitors by Type of Advertisement

Category	Repeat Visitor	1st Time Visitor
Saw No Ads	94	6
Can't Recall	92.9	7.1
Other	100	
Magazine	73.9	26.1
Travel Pub.	88.9	11.1
Newpaper	90	10
Website	91.7	8.3
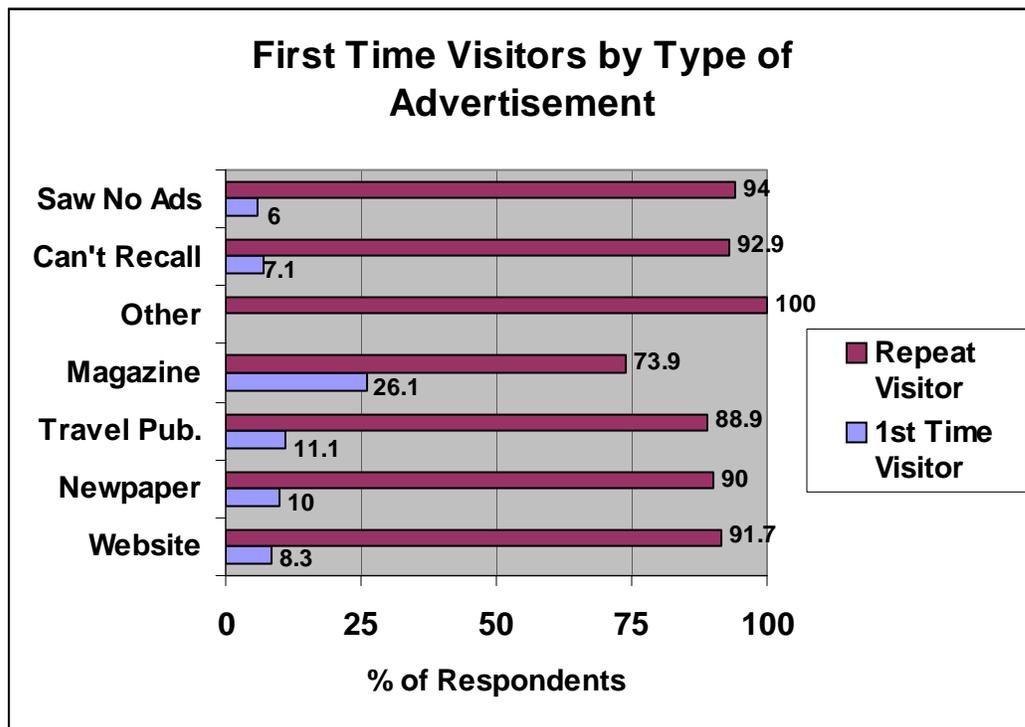
% of Respondents

Source: Waterloo/Cedar Falls Ad Conversion Study '04 UNI-STEP

Chart 34 shows that for each of the advertisement sources, the majority of respondents were repeat visitors. Of those who reported viewing "other" types of advertisement, 100% of the respondents were repeat visitors. The largest percent of "1st Time Visitors" (26.1%) can be found in the "magazine" category.
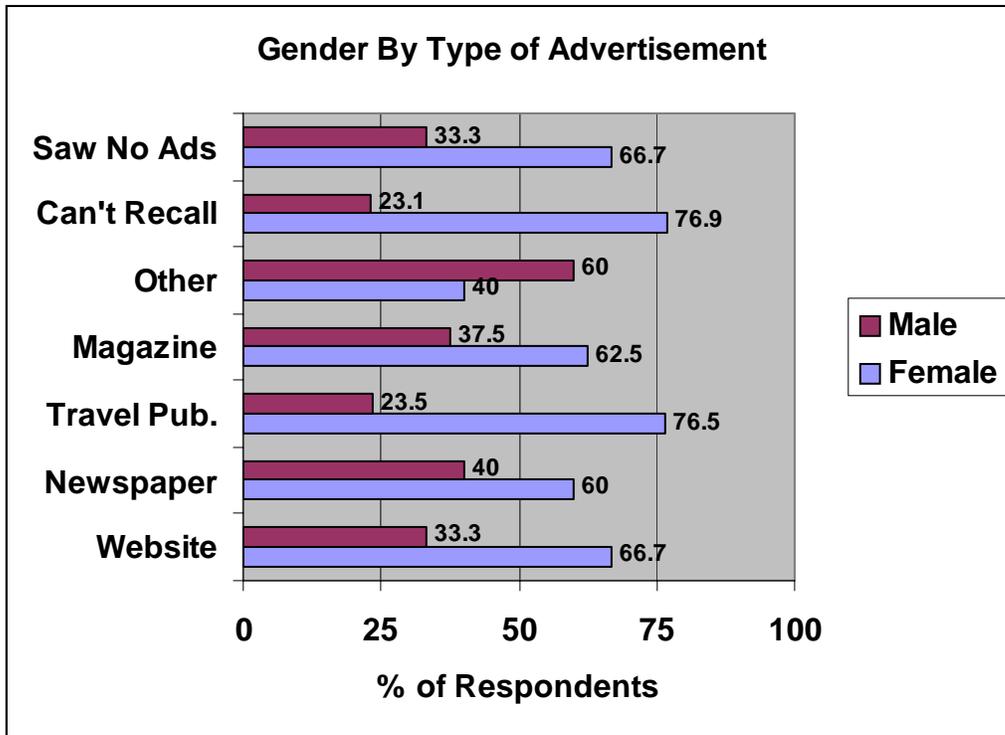
Chart 35 analyzes the gender of the respondents in regard to the different advertisement sources. The data shows what percent of respondents in each advertisement source were male or female.

Chart 35: Gender of Respondents by Type of Advertisement

Gender By Type of Advertisement

Type of Advertisement	Male	Female
Saw No Ads	33.3	66.7
Can't Recall	23.1	76.9
Other	60	40
Magazine	37.5	62.5
Travel Pub.	23.5	76.5
Newspaper	40	60
Website	33.3	66.7

% of Respondents

Source: Waterloo/Cedar Falls Ad Conversion Study '04 UNI-STEP

From the data in Chart 35, it can be seen that in most cases there were more female respondents than male respondents. Only in the "Other" category were there more males (60%) than females (40%), which included responses of viewing the yellow pages, horse show information, welcome center, and a TV commercial. These findings could also be related to who in the households were more willing to take the time to complete the survey.

VII. Trip Satisfaction

A. Factors Preventing Return Visits

Respondents were given a list of factors and asked to choose which would prevent them from visiting the Cedar Valley again. The top 9 responses appear in Table 6.

Table 6: Top 9 Factors Preventing Return Visits

Factors	% of Respondents
Lack of Personal Time	30.9%
Distance From Home	19.1%
Lack of Money	15.5%
Other	8.2%
Fees/Costs	6.4%
Transportation Costs	4.6%
Lack of Information	4.6%
Lodging	3.6%
Lack of Activities	3.6%

Source: Waterloo/Cedar Falls Ad Conversion Study '04 UNI-STEP

As shown in Table 6, the top factors that would prevent respondents from visiting again were a lack of personal time (30.9%), distance from home (19.1%), and lack of money (15.5%). By looking at this list, the tourism offices can have a better understanding about what factors matter most to visitors. A number of the top responses are out of the control of the tourism offices, but other things can be gained from this data. For instance, it could be said that people are looking for more affordable trips that are

shorter in duration, due to the lack of personal time and money. They may be looking for ways to serve multiple purposes with one trip.

B. Strengths and Weaknesses

The survey asked the respondents to list the top two strengths and weakness of the Waterloo/Cedar Falls area. This was an open-ended question, which means respondents could write in anything they wanted. Table 7 lists the top 6 strengths that were reported.

Table 7: Strengths of Waterloo/Cedar Falls

Strengths	Percent (%) of Respondents
People (friendly, nice, helpful)	18%
University of Northern Iowa	12%
Scenic, clean, nice place	11%
Trail System (biking, walking)	9%
Shopping	7%
Dining	7%

Source: Waterloo/Cedar Falls Ad Conversion Study '04 UNI-STEP

Combining similar responses into specific categories created the strengths above. For example, the "People" strength included comments about helpful staff, friendly residents, and nice people. The next top response was UNI (12%), which included comments regarding the college, the dome, GBPAC, and special events held. Many respondents also listed strengths about the communities being scenic, clean, beautiful, and an overall nice place to visit, which was reported by 11% of respondents.

There were some strengths that were only reported by a smaller number of respondents. For this reason they did not make the top 6 table, but should be mentioned. They included John Deere, the Jazz Festival, cultural events, agricultural opportunities, and hotels.

Respondents were also asked to identify weaknesses, which may not be evident to those providing the services. Visitors can offer a new and fresh perspective on things. By looking at these top 5 weaknesses, we can gain insight into some things that could be improved in the future to improve the visitor's experiences. The top 5 weaknesses identified are listed in Table 8.

Table 8: Weaknesses of Waterloo/Cedar Falls

Weaknesses	Percent (%) of Respondents
Roads/traffic (condition, confusing)	28.3%
Shops (not enough, too costly)	13%
Restaurants	8.7%
Lack of Things to Do	6.5%
Lodging	6.5%

Source: Waterloo/Cedar Falls Ad Conversion Study '04 UNI-STEP

"Roads/traffic" received the largest percent of responses with 28.3% which included such things as bad signage, confusing roads, and roads in bad condition. The next weakness was "shops" (13%) which was made up of responses such as shops being too costly, not enough variety of shops, and the need for better shops downtown.

C. Waterloo/Cedar Falls Satisfaction

Respondents were asked to rank their satisfaction with different aspects of their trip to Waterloo/Cedar Falls. Table 9, lists aspects of travel to area are listed along with the mean satisfaction score.

Table 9: Waterloo/Cedar Falls Satisfaction

| Aspects of Trip to Waterloo/Cedar Falls	Mean Satisfaction Score*
Visitor Information	1.16
Customer Service	1.17
Friendly People	1.18
Shopping	1.21
Things to do in WL/CF	1.23
Recreation Opportunities	1.23
Things to do Elsewhere in Iowa	1.24
Cultural Activities/Events	1.25
Appearance of Area	1.26
Restaurants	1.26
Lodging and/or Camping	1.28
Highway Directional Signs	1.37
Directional Signs	1.38
Historical Attractions	1.41
Reservations for Events	1.43
Agricultural Activities/Experiences	1.46
Public Transportation	1.74

Source: Waterloo/Cedar Falls Ad Conversion Study '04 UNI-STEP
* Mean Satisfaction Score: Scale - 1= Satisfied, 2 = Neutral, 3 = Dissatisfied

When looking at Table 9 it is important to keep in mind the scale on which responses were measured. For this scale, the lower the score the more satisfied respondents were with that particular aspect. The aspects that respondents were most satisfied with were visitor information (1.16), customer service (1.17), friendly people (1.18), and shopping (1.21).

D. Overall Trip Satisfaction

Respondents were also asked to rate their overall satisfaction with their trip to Waterloo/Cedar Falls. They could choose very satisfied, satisfied, neutral, dissatisfied, or very dissatisfied.

Chart 36: Overall Trip Satisfaction
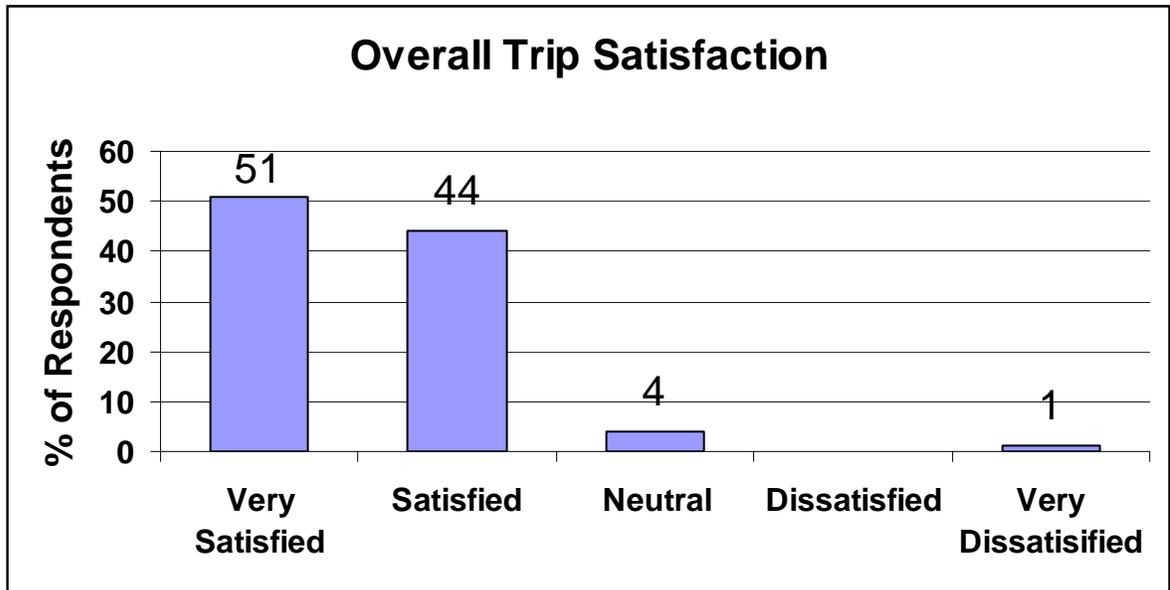
Source: Waterloo/Cedar Falls Ad Conversion Study '04 UNI-STEP

Chart 36 shows the distribution of respondents overall satisfaction. The overwhelming majority of respondents (95%) were either satisfied or very satisfied with their most recent trip to the area. Only 4% of respondents had a neutral response, while no respondents reported being dissatisfied and only 1% reported being very dissatisfied.

VIII. Conclusions and Recommendations

H. Visitor Profile/Travel Patterns

Knowledge about who is visiting Waterloo/Cedar Falls is a key component in providing visitors with great travel experiences. The profiles and travel patterns developed from the data collected for this research will allow both Waterloo and Cedar Falls tourism offices to better understand who is visiting, why they are coming, how often the come, and what the best ways would be to reach them with advertising. Most of the respondents (67%) were females and respondents typically (70.4%) were between the ages of 40 and 69. The largest group of respondents (24.5%), had an income between $50,000 and $74,999. A majority of respondents were traveling here from Iowa or other Midwestern states.

The median travel party size for respondents was 2 people for each of the different types of requests (internet, phone, mail, and magazine). The phone requests had a slightly higher mean party size with 7 people, but there were no significant differences between the types of requests according to the Analysis of Variance test. The majority of these parties (68.9%) were traveling with their family, which was followed by those traveling alone (14.2%).

The primary purpose of trip for a majority of respondents (85%) was pleasure, while 15% of respondents were traveling for business purposes. Of those traveling for pleasure the top purposes were visiting friends and relatives, shopping, and other. A large percent of the respondents (41%) planned their route to the Cedar Valley, but did not plan their stops along the way.

Of the respondents 52% had been to Waterloo/Cedar Falls before, while 48% of them were first time visitors. This shows that there are a lot of new people coming to the area as well as those returning for a second or third time. The majority of respondents (59.3%) stayed 1 or 2 nights in the Cedar Valley, which leads to the fact that 61.4% of the respondents stayed in a hotel/motel. The fact that visitors are staying over night means positive things for the area. The visitors will probably visit more attractions and more money is coming into the community.

As for when the visitors are coming to the area, the most common months of arrival were May and June with 22.2% of the respondents each. This shows that the beginning of summer seems to be a popular time for visitors. However, the months of September (0%), February (1.4%), and March (1.4%) were the least popular when visiting the area. These months may be prime time to offer some special discounts or new special events to draw visitors during the slower months. When asked what day of the week they arrived in the Cedar Valley, Friday (24.5%) and Saturday (20.8%) were the most popular days. This shows that many respondents are probably making weekend visits to the area. Finally, the most common type of transportation used within the Cedar Valley and to get to the Cedar Valley was the respondent's personal automobile.

I.   Spending Patterns

The spending patterns assist in understanding what economic contribution the tourism industry is providing for the community. The total spending that was reported by the respondents was $36,914 and that is just a small sample of all the visitors that come to the area. This is a significant amount of money being brought into the community. The mean amounts spent in different categories were as follows: lodging ($374),

restaurant/bar ($104), grocery/convenience store ($32), recreation/entertainment ($100), and all other items ($80).

J. Information Seeking/Advertisements

When looking at the type of requests received by each of the tourism offices a couple areas stand out. The phone and internet requests are higher in Waterloo as compared to Cedar Falls. A majority of the respondents (71%) requested information before they visited the area. This shows how important the information given out is to attracting visitors to the area. There were several reasons for requesting the information, which included: planning a trip to WL/CF (35.4%), wanted up-to-date information about WL/CF (34.2%), planning a trip to Iowa (33.8%), other (27.4%), and looking for a job (2.5%).

A large group of respondents (37.8%) reported seeing no advertisements before visiting. While 18.5% saw a magazine advertisement, 13.3% saw a travel publication ad, 8.9% viewed a website ad, and 7.4% viewed a newspaper ad. When looking for local sources of information the largest group (20.8%) used the CVB. Overall respondents thought the information they received was very helpful.

K. Marketing and Promotional Implications

When comparing the total trip spending by the type of requests it was shown that the internet requests had the highest mean spending while the mail requests has the lowest mean spending. In can also be noted that those who viewed a website advertisement had the highest mean and median spending, while those who viewed a newspaper advertisement had the lowest mean and median spending. The magazine

advertisements seemed to generate the most first time visitors, with 26.1% of those who viewed the magazine ads.

L. Trip Satisfaction

The top three factors reported by respondents that would prevent them from visiting again were lack of personal time (30.9%), distance from home (19.1%), and lack of money (15.5%). This seems to show that people are looking to visit somewhere close to home and somewhere that is rather inexpensive. Respondents also reported the top three strengths of WL/CF to be the people, UNI, and the cleanliness of the area. While the top three weaknesses of the area were the roads/traffic, shops (not enough), and restaurants. Finally, respondents were overall (95%) either satisfied or very satisfied with their entire trip to Waterloo/Cedar Falls.