

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



University of Northern Iowa
Sustainable Tourism and the Environment Program

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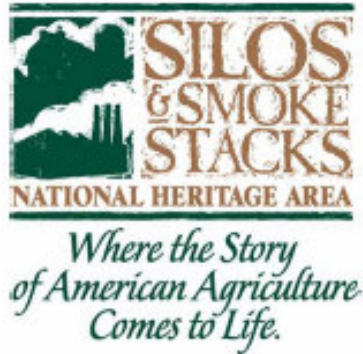
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**Visitor Characteristics of Museums
in the Silos and Smokestacks National Heritage Area**



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Executive Summary

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

- The study includes an analysis of travel characteristics, visitors' demographic profile, economic and marketing assessment and visitors' satisfaction in 38 SSNHA Museum Sites.
- The study concluded that:
 - The primary purpose of visitors who are not part of an organized group (93%) was specifically to visit the heritage site. Visitors have had on average five trips to the region.
 - Over half of the visitors were on an overnight trip (54%) and the remainder on a day trip (46%)
 - Generally, visitors to the SSNHA Museum sites for (42%) were 51 years of age and above, with the average age being 52. Most of the visitors (57%) are women and nearly sixty percent either went to college or graduated from college.
 - On average, visitors to the SSNHA Museums spent more on lodging (\$202.50) and shopping (\$81.03) than average amounts spent by visitors as collected by the Iowa visitor centers.
 - Most of the visitors (65%) did not receive any information before they left on their trip, and (44%) did not plan before making the trip. The most common medium where they saw some advertisement before visiting the region was the newspaper (12.4%) and the most common place to receive information was at a local visitor bureau.

Table of Contents

List of Charts

List of Tables

	Page
I. Introduction	8
II. Purpose and Objectives of the Study	9
III. Methodology	10
IV. Overall Survey Results	11
A. Trip Characteristics	11
1. Previous Visits	11
2. Primary Purpose	12
3. Length of Stay	14
4. Part of an Organized Group	16
5. Travel Party Size	17
B. Visitor Profile	18
1. Age	18
2. Gender	19
3. Education Level	21
4. Income	21
C. Spending Patterns	22
D. Trip Planning and Information Seeking	25
1. Information used for Planning Trip	25
2. Source of Information While Traveling	28
3. Helpfulness of information	29
4. Familiarity of SSNHA	30
E. Visitor Satisfaction	30
1. Hospitality & Visitor Information	31
2. Cultural/Historical Attractions	32
3. Activities/Things to Do	32
4. Overall Satisfaction	33
V. Conclusions & Recommendations	35
A. Trip Characteristics	35
B. Visitors Demographic Profile	35
C. Spending Assessment	36

D. Marketing Assessment	37
E. Visitor Satisfaction	37
F. Overall Results Compared with Museum Results	38
References	39
APPENDIXES	40
Appendix 1 Survey	40
Appendix 2 t-tests & One-way ANOVA Statistics	43

List of Charts

Chart no. 1	Percentage of Visitors who Have Visited the Region Previously	11
Chart no. 2	Amount of Trips Taken to Region	12
Chart no. 3	Primary Purpose of Trip	13
Chart no. 4	Primary Trip Purpose for Day and Overnight Visitors	13
Chart no. 5	Type of Visit to Region	14
Chart no. 6	Number of Hours Spent in the Region while on a Day Trip	15
Chart no. 7	Total Number of Nights Spent in the Region	15
Chart no. 8	Where Visitors Stayed Overnight	16
Chart no. 9	Visitors Traveling with an Organized Group	17
Chart no. 10	Size of Travel Party	17
Chart no. 11	Age of Visitors	19
Chart no. 12	Gender of Visitors	20
Chart no. 13	Level of Education Completed	21
Chart no. 14	Visitor's Income Level	22
Chart no. 15	Visitors who Received Information While in Iowa	26
Chart no. 16	Planning Before Trip	27
Chart no. 17	Advertisements for the Region Before Visiting	27
Chart no. 18	Where Visitors Received Information While in Iowa	28
Chart no. 19	Helpfulness of Information	29
Chart no. 20	Familiarities with SSNHA	30
Chart no. 21	Hospitality & Visitor Information Satisfaction Levels	31
Chart no. 22	Cultural & Historical Attractions Satisfaction Levels	32
Chart no. 23	Activities/Things to Do Satisfaction Levels	33
Chart no. 24	Overall Satisfaction	34

List of Table

Table no. 1	Mean, Median, and Mode of Travel Party Size	18
Table no. 2	Mean, Median, and Mode of Age of Visitors	19
Table no. 3	Age of Visitors per Gender of Visitors	20
Table no. 4	Mean and Median of Spending Categories	23
Table no. 5	Primary Purpose of Trip vs. Average Spending Categories	25
Table no. 6	Museums vs. Overall Sites	38

I. Introduction

Heritage tourism can be considered a subclass of cultural tourism, which is defined by the World Tourism Organization (1985) as movements of persons for essentially cultural motivations such as study tours; performing arts and cultural tours; travel to festivals and other cultural events; visits to sites and monuments; and travel to study nature, folklore, and/or pilgrimages (quoted in Prideaux, 1999). Zeppel and Hall (1992) as cited by Prideaux, defined heritage tourism as a division of cultural tourism that is based on nostalgia for the past and the desire to experience diverse cultural landscapes and forms. In recent years, culture (including heritage) has been rediscovered as a major marketing tool to attract tourists who are in search of rewarding and enriching experiences.

A museum can be defined as a non-profit-making, permanent institution, in the service of a society and of its development and open to the public, which acquires, conserves, researches, communicates, and exhibits for the purpose of study, education and enjoyment, material evidence of people and their environment as cited by Prideaux.

Along with the growth of domestic tourism, there has been an interest in the nation's heritage. Tourists appear to be interested in visiting museums in order to learn about the region's rural heritage. Rural museums appear enthusiastic to obtain a greater share of the tourist market, but they have not yet succeeded in increasing visitor numbers.

Previous tourism literature has recognized that when tourists are aware of an attraction, a decision to visit generally is a trade-off between the cost and effort of the trip and the benefits of the experience, although little research has been done to study tourists' awareness of attractions such as museums.

Rural museum tourism makes a generous contribution to the economic impact on the communities in Northeast Iowa. In order to better serve these visitors, it is important to understand their travel characteristics and spending patterns. The aims of this study are to

identify these visitor characteristics as well as the economic contribution of the museums which are a part of the Silos and Smokestacks National Heritage Area (SSNHA) located in Northeast Iowa.

Silos and Smokestacks National Heritage Area (SSNHA) is located in northeast Iowa covering 37 counties and 20,000 square miles whose purpose is to allow visitors to experience America's agriculture, past and present. There are currently over 70 partnership sites within this area. The mission of SSNHA as stated by their website reads:

"To ensure that residents and visitors alike can learn about the significant contributions that Northeast Iowa's people and land have made to America's agricultural legacy."

The Silos and Smokestacks National Heritage Area includes local farms, museums, parks and gardens, schools and other businesses. This unique area as affiliated with the National Park Service is designed to improve the quality of life for citizens, the economic viability of the area and the image of Northeast Iowa in the eyes of residents and tourists as reported by a previous study of SSNHA.

II. Purpose and Objectives of the Study

The purpose of this study, as conducted by the University of Northern Iowa's Sustainable Tourism and Environment Program (STEP) is to help partner sites effectively tell the story, through the use of research and better serve visitors to the SSNHA museums. It is important to identify these visitor characteristics and the economic contributions they have on their communities in order to determine the best ways to accommodate these visitors with appropriate goods and services.

The objectives of this study are:

1. To identify trip characteristics of visitors to the SSNHA Museums;

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

III. Methodology

A questionnaire based survey was designed to help understand the visitor population. The visitors were intercepted at 38 out of 58 partner site museums (total number of partners at the time this study was initiated). Depending on the site, the surveys were handed out by students from the University of Northern Iowa-STEP or by partner site staff. Visitors intercepted included anyone who was visiting the site whether or not they were residents of the area. The intercept survey was initiated during the month of August 2003 and it continued through June 2004. This time frame was selected to gather representative data of visitors traveling in different seasons. By the end of June 2004, 395 surveys were completed.

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

IV. Overall Survey Results

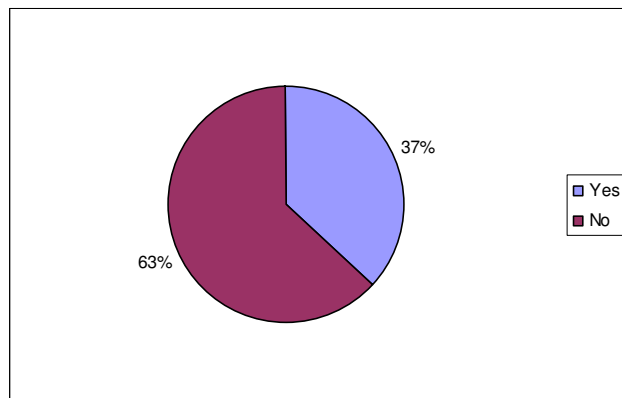
A. Trip Characteristics

The first part of the questionnaire addressed trip characteristics. Visitors of the SSNHA Museums were asked whether or not they were first time visitors, what their primary purpose was for visiting, and how long they stayed in the area. Guests were also asked if they were traveling in an organized group or not, what their travel party size was, and what other places they were visiting in the area.

1. Previous Visits

The visitors were first asked if they had ever visited the region before this current trip.

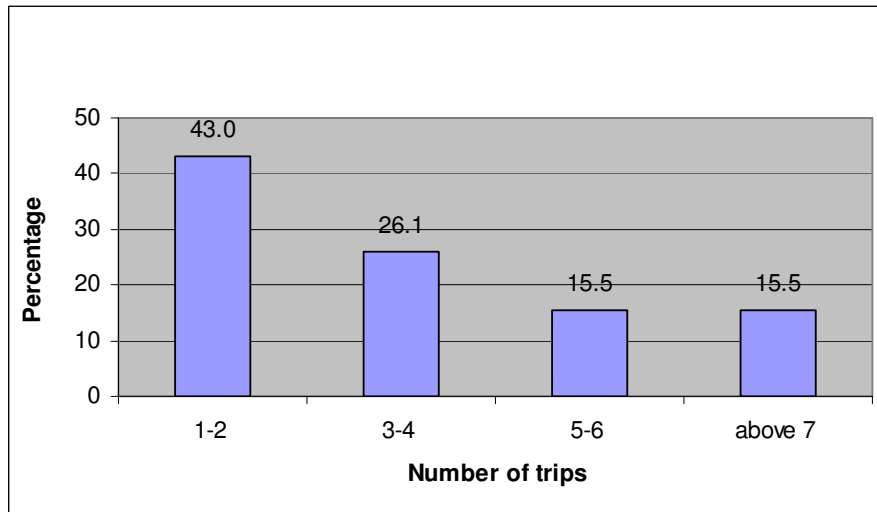
Chart no. 1 Percentage of Visitors Who Have Visited the Region Previously (n=390)



Source: UNI-STEP; 2003-04 SSNHA Museums Visitor Study

Most of the visitors who visited the SSNHA Museums have not been to the region before (chart no. 1). Sixty-three percent said they have never visited the region before while 37% said they had previously visited the region. Of those who had previously visited the region, the majority (42.9%) had only visited the region one or two times previously (chart no. 2).

Chart no. 2 Amounts of trips taken to region (n=142)



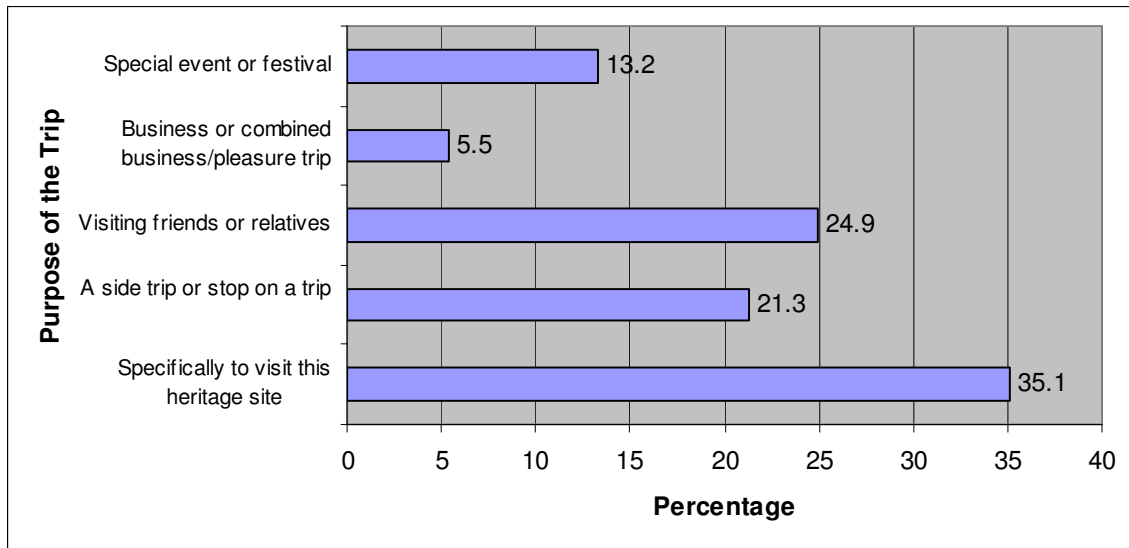
Source: UNI-STEP; 2003-04 SSNHA Museums Visitor Study

The majority of the visitors (42.9%) have visited the museum one to two times. A little over 26% of the respondents had visited three to four times before whereas only 15.5% of visitors had visited five to six times as well as seven or more times before. The average amount of trips taken was 4.63.

2. Primary Purpose of Trip

Visitors were asked why they came to the region and had five different options to choose on the questionnaire. These options included a festival/special event, a combined business/pleasure trip, to visit friends and/or relatives, a side trip on the way to somewhere else, or to specifically visit the Silos and Smokestacks National Heritage Area Museums.

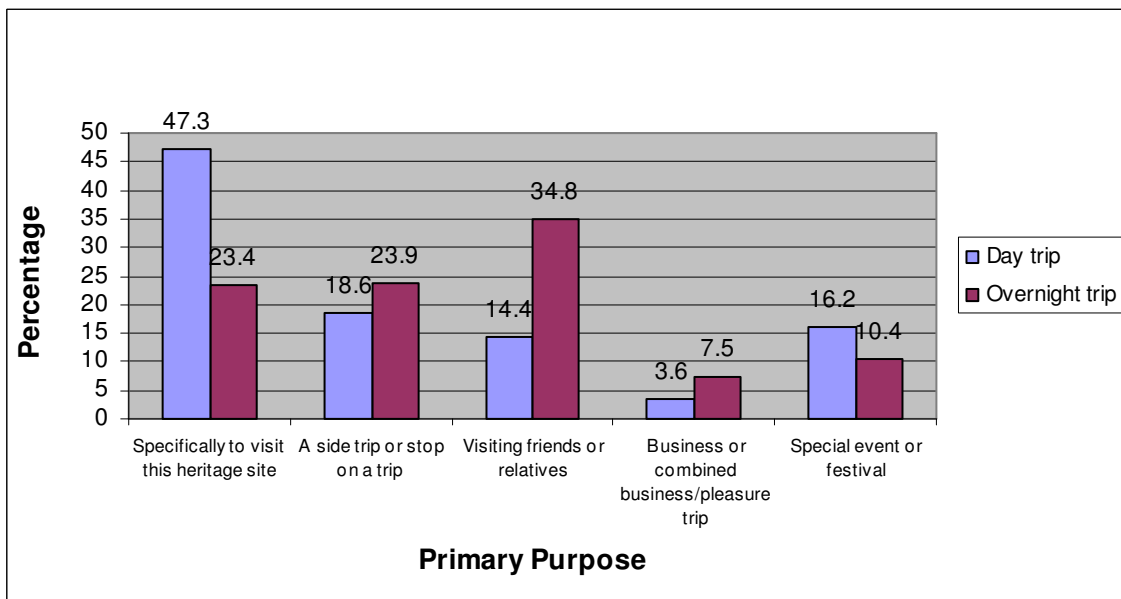
Chart no. 3 Primary Purpose of Trip (n=385)



Source: UNI-STEP; 2003-04 SSNHA Museums Visitor Study

Of those surveyed, 35% came to the region specifically to visit the heritage site where they were intercepted. Twenty-one percent of those surveyed were visiting the SSNHA site as a side trip or a stop on a trip. Respondents were then divided into two categories: whether they were part of a day trip or an overnight trip.

Chart no. 4 Primary Purpose of Day and Overnight Visitors (n=368)



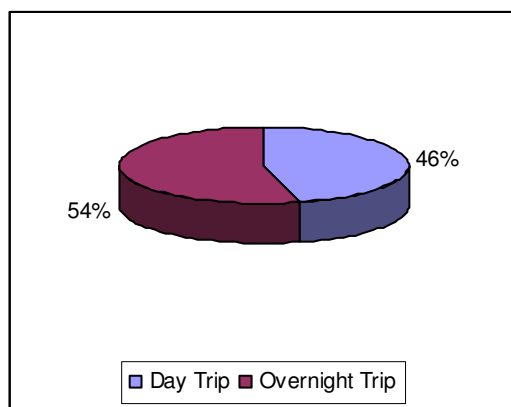
Source: UNI-STEP; 2003-04 SSNHA Museums Visitor Study

Most of the visitors (47.3%) who were visiting the museum heritage site were part of an overnight trip(chart no. 4). The primary purpose of those on an overnight trip was to visit friends and/or family (34%). Only 3.6% of the respondents whose purpose was a business trip or a combined business/pleasure trip were part of a day trip, whereas 7.5% of the respondents were part of an overnight trip with the same purpose.

3. Length of Stay

On the questionnaire, a question asked what type of visit was being made to the area: a day or overnight trip.

Chart no. 5 Type of Visit to Region (n=373)

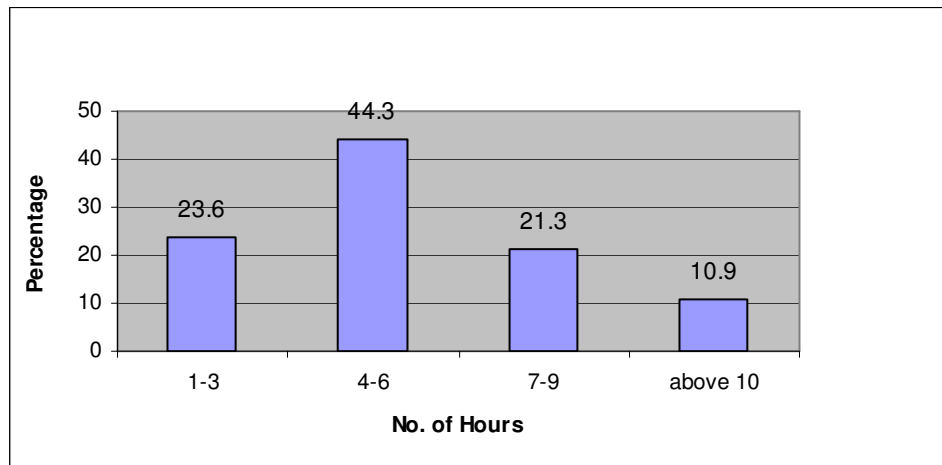


Source: UNI-STEP; 2003-04 SSNHA Museums Visitor Study

Fifty-four percent of those respondents who completed the question (373) were part of an overnight trip whereas 46% were part of a day trip to the region (chart no.5). As the results show, there is not a big difference in the types of visit to the region.

Respondents were then asked how long they had spent in the area so far. Those on day trips were asked how many hours they have spent in the local area. Those on overnight trips, were asked how many days they had spent in the local area.

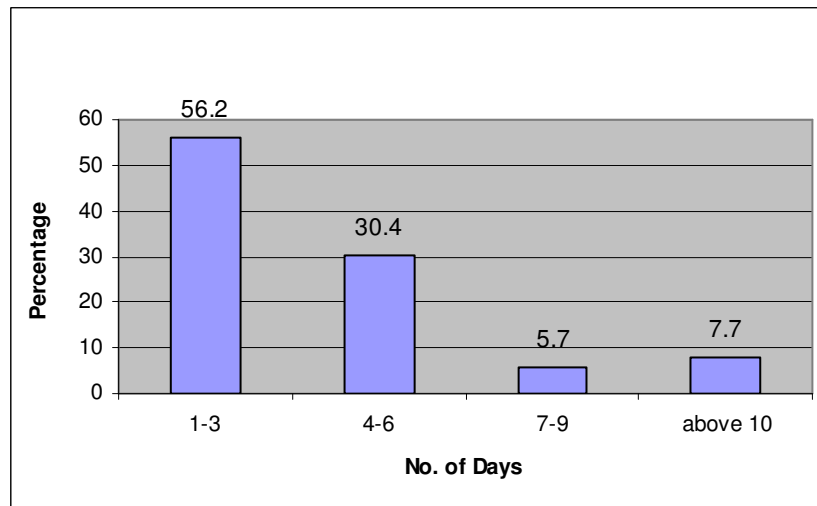
Chart no. 6 Number of Hours Spent in the Region while on a Day Trip (n=174)



Source: UNI-STEP; 2003-04 SSNHA Museums Visitor Study

Results ranged from one hour to 30 hours (chart no.6). It was found that the majority (44.3%) of them had spent four to six hours so far in the local area. Only 10.9% of those asked had spent 10 or more hours in the area.

Chart no. 7 Total Number of Nights Spent in the Region (n=194)

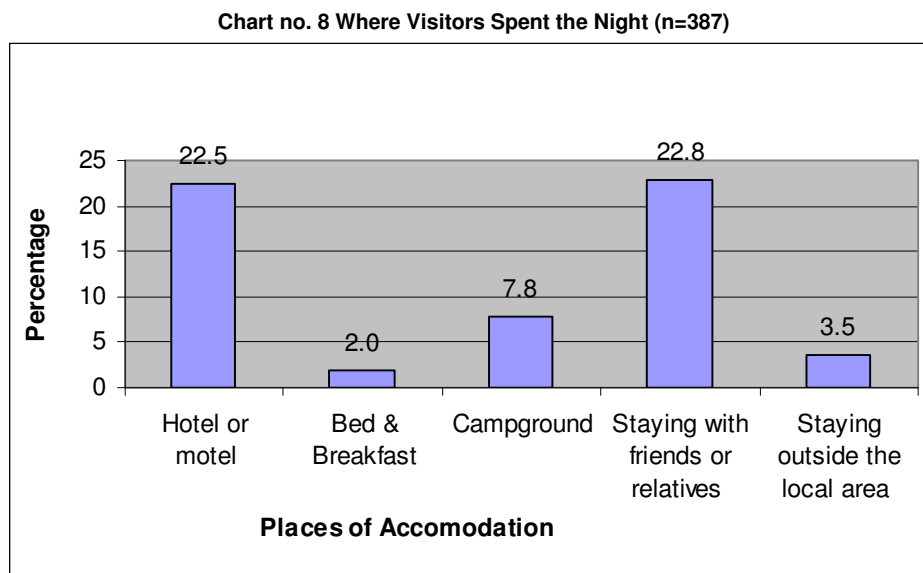


Source: UNI-STEP; 2003-04 SSNHA Museums Visitor Study

Chart 7 illustrates the number of nights spent in the local area for those respondents on overnight trips (54%). Results ranged from one to 30 nights in the region. The majority of

people (56.2%) had spent one to three nights in the area. Only 7.7% on overnight trips had spent more than ten nights in the region, whereas 5.7% had seven- nine nights.

For those visitors on an overnight trip, it was asked what type of lodging they were staying in or planning on using. The participants were given five options: hotel or motel; bed and breakfast; campground; staying with friends or relatives in the area; or staying overnight outside of the local area or just passing through.



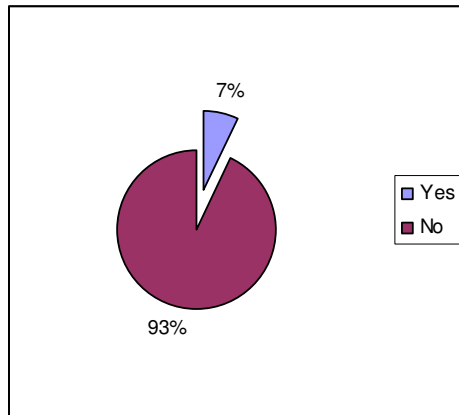
Source: UNI-STEP; 2003-04 SSNHA Museums Visitor Study

22.5% of visitors staying overnight were staying or planning to stay in hotels or motels (chart no. 8). Nearly one quarter 23.0% of the participants were staying with friends of relatives within the local area. Only 2.0% of the overnight visitors were staying at a bed and breakfast.

4. Part of an Organized Group

Participants were asked in the questionnaire if they were traveling to this region as part of an organized group tour. The respondents were asked to either check yes or no in order to answer this question (chart no. 9).

Chart no. 9 Visitors Traveling within an Organized Group (n=383)



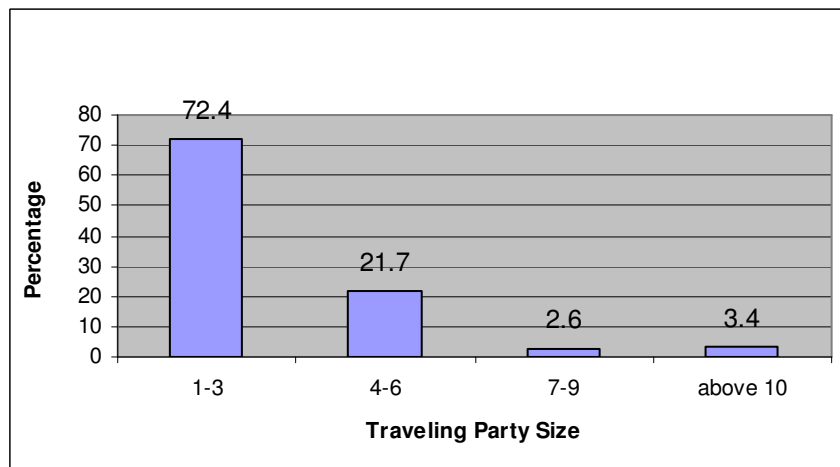
Source: UNI-STEP; 2003-04 SSNHA Museums Visitor Study

As the chart shows, only 7% of the SSNHA Museum visitors were traveling in an organized group. The other 93% were traveling individually or with their friends and/or family.

5. Travel Party Size

As part of the questionnaire, visitors of the SSNHA Museums were asked to write in the number of people (including themselves) within their immediate travel party. The results ranged anywhere from one to 42.

Chart no. 10 Size of Travel Party (n=385)



Source: UNI-STEP; 2003-04 SSNHA Museums Visitor Study

Chart 10 illustrates that the majority of people intercepted to complete the survey traveled in a group of one to three people. Out of the 385 who answered this question, 72.4% of the visitors traveled in a group of three or smaller. Only 3.4% of the respondents traveled in groups of 10 or more. Nearly one quarter 21.7% of the 385 participants travel in groups of four to six people including themselves.

The mean travel party size of those surveyed was 3.41 (table no. 1). The most common travel party size was 2 people. This is reflected by the results illustrated in chart 10 with 72.3% of those who responded traveled with one to three people in their party.

Table no. 1 Mean, Median, Mode of Travel Party Size

Mean	3.41
Median	2.00
Mode	2

Source: UNI-STEP; 2003-04 SSNHA Museums Visitor Study

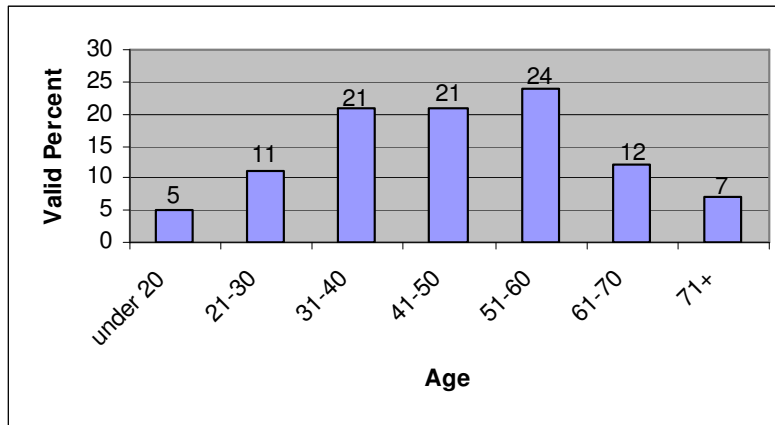
B. Visitor Profile

The fourth section of the questionnaire involved questions about visitor demographics. Respondents were asked their age; gender; what level of education they have completed; their annual household income; and where they live including the city, state, country and zip code. This was done in order to create a visitor profile for those visiting the Silos and Smokestacks National Heritage Area Museums. The profile can then be used to find the best way to market to the travelers and adapt the museums in order to accommodate their needs and wants.

1. Age

Visitors intercepted to participate in the questionnaire were asked their age. Results ranged anywhere from under 20 to over 75. The results are shown in chart number 11.

Chart no. 11 Age of Visitors (n=346)



Source: UNI-STEP; 2003-04 SSNHA Museums Visitor Study

Twenty-four percent of the visitors to the museums were between the ages of 51 to 60. Age groups 31 to 40 and 41 to 50 were close behind with 21% each. The smallest group with only 5% was the under 20 year old group.

The mean age of those surveyed was 52.03 years (table no. 2). The most common age of people who filled out the questionnaire was 60. The maximum age of visitors was 94 years old while the minimum age was 18 years old.

Table no. 2 Mean, Median and Mode of Age of Visitors

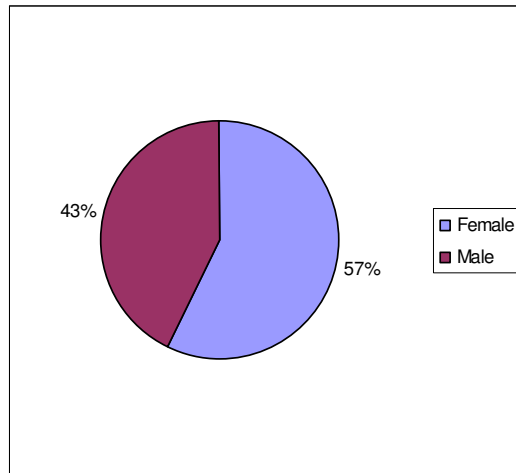
Minimum	18
Maximum	94
Mean	52.03
Median	52
Mode	60
Std. Deviation	15.627

Source: UNI-STEP; 2003-04 SSNHA Museums Visitor Study

2. Gender

In order to create a complete profile, demographics such as gender were asked. Chart number 12 shows the percentages of male to female respondents.

Chart no. 12 Gender of Visitors (n=337)



Source: UNI-STEP; 2003-04 SSNHA Museums Visitor Study

The Majority (57%) of visitors responding to the Silos and Smokestacks National Heritage Area Museums were female. Fifty eight people did not answer the question.

As compared to age, the most frequent age category for female respondents was between the ages of 51 and 60, whereas the most frequent category for men was between the ages of 31 and 40. This is illustrated by table number 3.

Table no. 3 Age of Visitors per Gender of Visitors (%) (n=326)

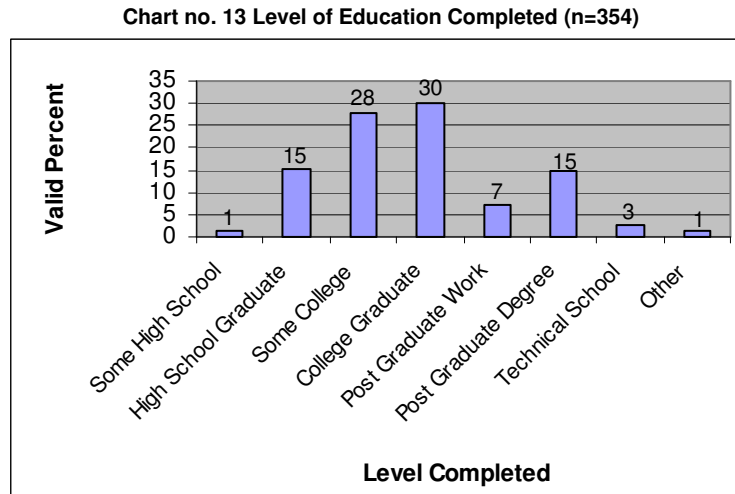
	under 20	21-30	31-40	41-50	51-60	61-70	71+
Female	2.8	7.4	10.7	10.7	14.1	4.9	5.2
Male	2.4	3.6	10.1	9.5	9.8	7.1	1.5
Total	5.2	11.0	20.8	20.2	23.9	12.0	6.7

Source: UNI-STEP; 2003-04 SSNHA Museums Visitor Study

Table 3 shows that only 2.8% of the females and 2.4% of the males were under the age of 20 while 5.2% of the females and 1.5% of the males were over the age of 71. The visitors of the SSNHA Museums were primarily between the ages of 51 and 60 accounting for 23.9% of the museums' visitors.

3. Level of Education

Another demographic question asked in the intercept survey was the highest level of education respondents had received. Visitors were to choose between eight different groups. These groups included some high school, high school graduate, some college, college graduate, post graduate work, post graduate degree, technical school, or other.



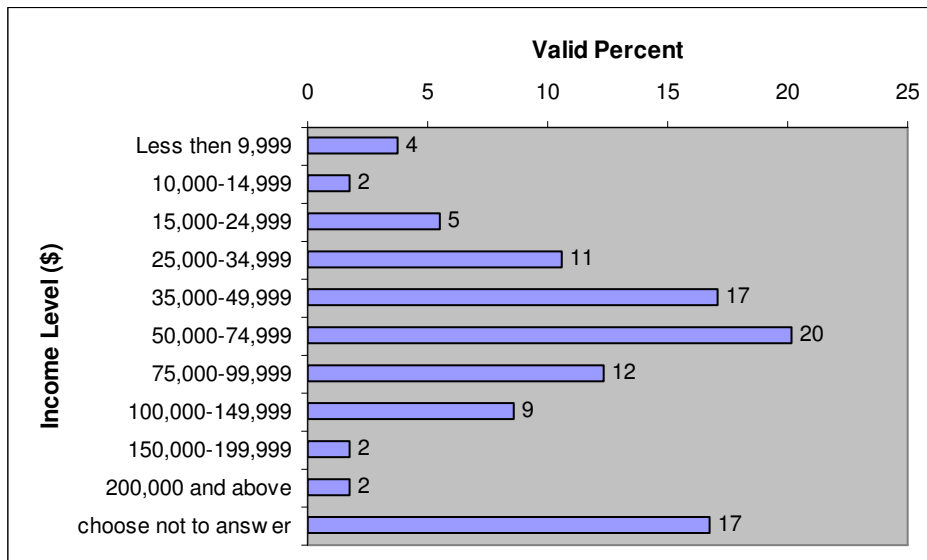
Source: UNI-STEP; 2003-04 SSNHA Museums Visitor Study

It was found that 30% out of the 354 participants who filled out this question, had completed college and gotten their degree. Only (5%) had only some high school education translating into approximately 1% of the respondents. The majority of respondents (80%) had attended college and 52% of those respondents had graduated from college.

4. Income

The last question covered on the demographic section of the questionnaire asked of the person's income level, based on their 2002 annual household income from all sources and before taxes. They were to choose between 11 options.

Chart no. 14 Visitor's Income Level (n=292)



Source: UNI-STEP; 2003-04 SSNHA Museums Visitor Study

Chart number 14 shows the distribution of the different levels of income as reported by participants of the SSNHA questionnaire. The majority of respondents (20%) make between \$50,000 and \$74,999. This translates into 59 of 292 who answered the question. The second largest income level group was the \$35,000 to \$49,999 which accounts for 17% of the visitors. Seventeen percent was also the amount of people who chose not to answer this question. The lowest income groups were the \$10,000 to \$14,999; \$150,000 to \$199,999; and the \$200,000 and above, all accounting for 2% of the responses each. 103 people did not complete this question on the questionnaire.

C. Spending Patterns

One of the sections of the questionnaire included questions regarding the spending patterns of those visiting the region. Expenditures were grouped by category including lodging, restaurants, groceries, transportation expenses, admissions, and shopping. These categories were briefly described in order for visitors to understand each category. The lodging category included hotels, motels, campgrounds and cabins. The restaurant category included spending

money on such things such as restaurant and bar meals as well as drinks. The third category, groceries, included grocery or convenience store food and drink purchases. Other transportation expenses include all expenses involving gas, train or bus fees, etc. The admissions category consists of expenses related to all recreation and entertainment. Finally the shopping category includes costs pertaining to souvenirs, film, clothes, etc.

The respondents were to fill in the dollar amount spent in each category to the nearest dollar. This amount was to include money already spent plus everything they intended to spend. If they spent nothing on a category, they were to leave the space blank. The amount spent was to include money spent by all members of the travel party (mean= 3.41, median=2.00).

Table no. 4 Mean and Median of Spending Categories (\$)

Spending Category	Mean	Median	Maximum Spent	Mean	
				First Time Visitor	Repeat Visitor
Lodging	204.39	120	1500	253.04	149.80
Restaurant	75.90	50	400	82.61	72.01
Groceries	37.50	20	300	32.83	40.19
Transportation	43.79	28	300	58.27	34.53
Admissions	31.50	20	200	32.43	31.09
Shopping	81.03	50	500	103.37	66.49
Total	234.73	130	1500	327.65	183.78

Source: UNI-STEP; 2003-04 SSNHA Museums Visitor Study

As evident by table number 4, the majority of money was spent on lodging. The average amount spent on lodging was \$204.39. The maximum spent on lodging was \$1500 and the minimum was \$3.00. Visitors spent the least amount of money on admissions, the mean being \$31.50. Majority of people spent around \$10 on admissions. The average total spending is \$234.73.

Spending per category can be broken down between first time visitors compared to repeat visitors and males and females. On lodging, first time visitors (M= 253.0, SD= 287.1)

spend more than repeat visitors (M=149.8, SD=138.6). This result is statistically significant at a .02 level [t(79.8)=2.4]. For restaurant spending, first time visitors (M =82.6, SD=77.5) again spend more than repeat visitors (M =72.0, SD=77.8). This is not statistically significant at a .4 level [t(200)=.9]. On grocery spending, first time visitors (M =32.8, SD=30.4) spend less than repeat visitors (M =40.2, SD=50.6) Which is not statistically significant at a .4 level [t(103)=-.8].

On transportation, first time visitors (M =58.3, SD=67.9) spend more than repeat visitors (M =34.5, SD=40.3). This is statistically significant at a .032 level [t(2.2)=68.4]. For admissions, first time visitors (M =32.4, SD=30.8) spend more than repeat visitors (M =31.1, SD=34.5), but this is not statistically significant at a .830 level [t(.215)=117]. On shopping, first time visitors (M =103.4, SD=101.9) again spend more than repeat visitors (M =66.5, SD=69.4). This is not statistically significant at a .016 level [t(2.436)=126]. In regard to total spending, first time visitors (M =327.6, SD=329.2) spent statistically significant more than repeat visitors (M =183.78, SD=210.3), at .000 level, t(134.2)=3.7.

Spending was then compared between males and females. For spending on lodging, males (M =163.8, SD=229.4) spend more than females (M =149.7, SD=106.8), but this is not statistically significant at a .7 level [t(83)=-.3]. Males (M =84.9, SD=82.1) spend more than females (M =65.2, SD=68.6) on restaurant spending. This is not statistically significant at a .07 level [t(185)=-1.8].

On groceries, males (M =36.02, SD=49.1) spend more than females (M =35.5, SD=32.3), but again, this is not statistically significant at a .95 level [t(94)=-.06]. For transportation, females (M =35.95, SD=44.4) spent less than males (M =49.6, SD=62). This is not statistically significant at a .2 level [t(104)=-1.3]. On admission spending, females (M =30.9, SD=34.8) again spent less than males (M =35.3, SD=30.4). Again this is not statistically significant at a .5 level [t(103)=-.6]. Finally, on shopping, males (M =78.9, SD=90) spend more than females (M =76.88, SD=82.947). This is not statistically significant at a .9 level [t(104)=-.119].

Table no. 5 Primary Purpose of Trip v. Average Spending Categories (\$)

Primary purpose of trip	Money spent on lodging	Money spent at restaurants	Money spent on groceries	Money spent on transportation	Money spent on admissions	Money spent on shopping	Total Spent
Visit heritage site	314.27	55.24	35.61	45.07	23.44	68.80	224.46
Side trip/ stop on trip	114.66	87.11	30.06	39.27	39.13	73.04	226.44
Visiting friends/ family	188.19	97.80	55.23	51.76	39.05	88.45	260.62
Business trip	138.00	55.20	19.29	46.43	14.50	131.25	210.36
Special event/ festival	240.79	68.91	24.89	31.07	32.33	94.68	238.80

Source: UNI-STEP; 2003-04 SSNHA Museums Visitor Study

Overall, respondents spent more money per party size (Median=2) on lodging than any other spending category (table no. 5). Visitors with different purposes of travel spent significantly different on lodging, at $p = .009$ level [$F(102)=3.566$]. Visitors with different purposes of travel also spent significantly different at restaurants, at $p=.030$ [$F(201)=2.731$]. See appendix 2.

D. Trip Planning and Information Seeking

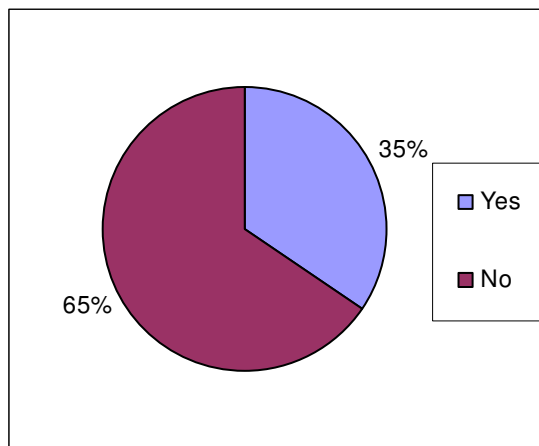
The second part of the questionnaire contained questions concerning the visitor's planning and information seeking for their trip. These questions covered planning prior to the trip, how much information was received before and during the trip, the types of advertisements that were seen prior to and during the trip and also how helpfulness of this information.

1. Information Used for Planning Trip

As part of the planning section, visitors were asked whether they had received any travel information before they left on their trip. They had to check yes or no response. This question

is designed to help the SSNHA decide on the types of information is most useful for visitors while planning their trips to the museums.

Chart no. 15 Visitors who Received Information before their Trip (n=385)

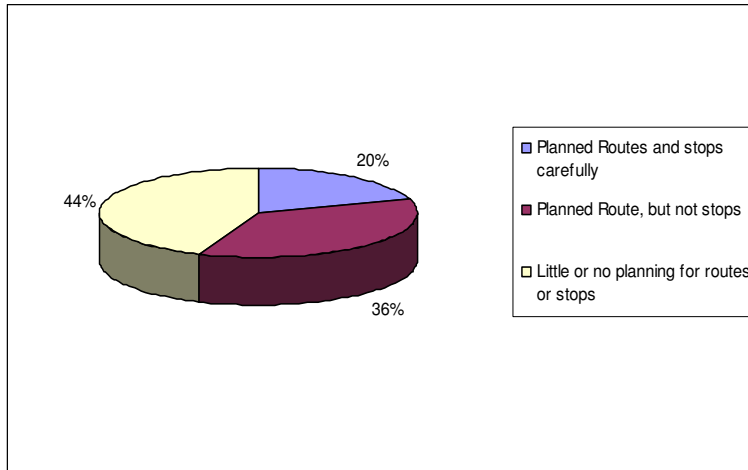


Source: UNI-STEP; 2003-04 SSNHA Museums Visitor Study

The majority of visitors did not receive any information prior to their visit (chart no. 15). Only 35% respondents did look at travel information before their trip to the Silos and Smokestacks National Heritage Area Museums.

Although the majority of people given the intercept survey reported not receiving any travel information before the trip, 56% of respondents did at least some planning prior to their trip (chart no.16). Twenty percent claimed to plan all routes and stops carefully while 44% did little or no planning for routes or stops on their trip. Of the 376 people who answered this question, 36% planned their route but not their stops. 19 people however did not answer this question.

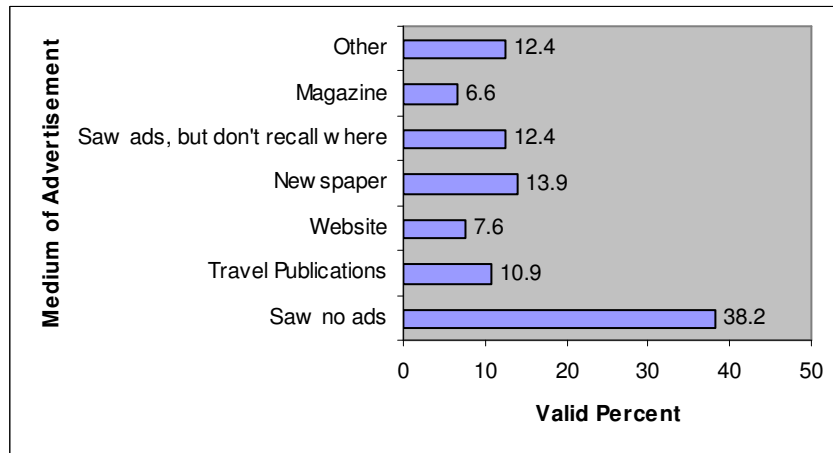
Chart no. 16 Planning Before Trip (n=376)



Source: UNI-STEP; 2003-04 SSNHA Museums Visitor Study

Visitors were asked what types of advertisements they saw, if any, prior to their trip. They were given seven options which included I saw no advertising; travel publications; website; newspaper; I saw advertising, but can't recall where; magazine or other form of advertisement.

Chart no. 17 Advertisements for the Region before Visiting (n=55)



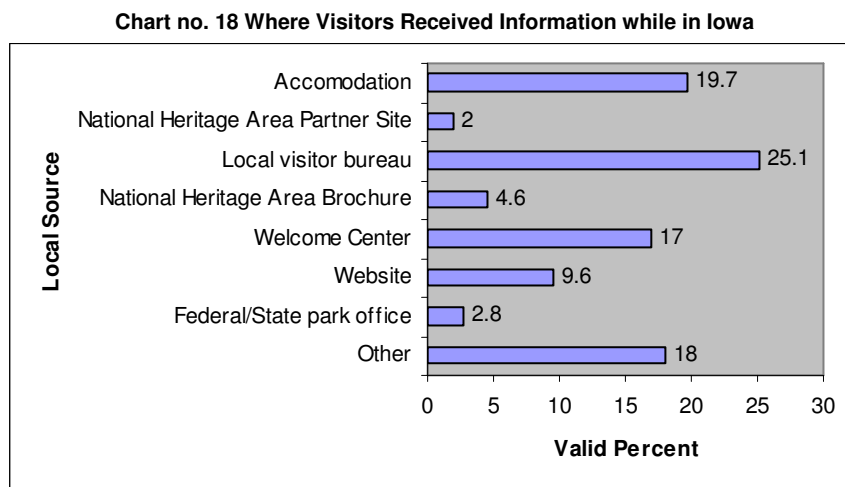
Source: UNI-STEP; 2003-04 SSNHA Museums Visitor Study

Many of the respondents (38.2%) did not see any advertisements prior to their trip. Almost 11% reported seeing advertisements for the local region in travel publications and only 6.6% of the visitors reported seeing any advertisements in magazines. Of the people who did

see advertisements, most (13.9%) saw them in newspapers. Only 7.6% of the respondents saw an advertisement on a website.

2. Source of Information While Traveling

One question on the questionnaire pertained to information visitors used while traveling within Iowa. Respondents were to check all that applied. The options were: hotel, motel, campground or other accommodation; National Heritage Area Partner Site; local visitor bureau or chamber of commerce office; National Heritage Area brochure; state-operated welcome center; website; federal or state park office; or other.



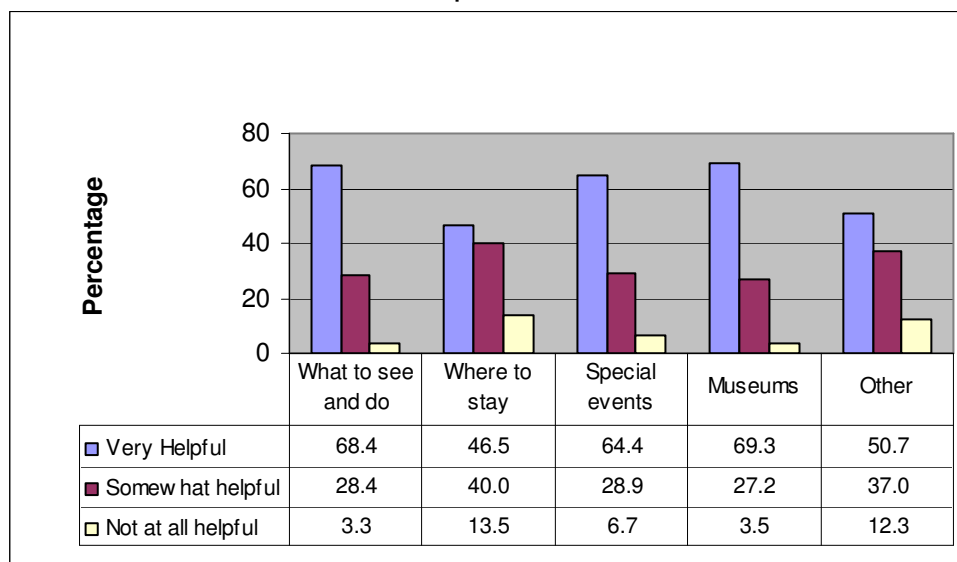
Source: UNI-STEP; 2003-04 SSNHA Museums Visitor Study

Approximately 25% of the people who answered this question claimed to receive their information from a local visitor bureau (chart no.18). Only 2.8% received travel information while in Iowa from a federal or state park office. Many people (19.7%) got information from the location of their accommodation. Four and a half percent of the respondents received information from the National Heritage Area brochure while only 2% got their information from a National Heritage Area Partner Site. Eighteen percent of the visitors received their information while in Iowa from other resources not listed, such as word of mouth.

3. Helpfulness of Information

The next question asked on the questionnaire pertained to the helpfulness of the information they received for planning. They were to rate the categories of what to see and do, where to stay, special events/festivals, museums and other on a scale of very helpful to somewhat helpful to not at all helpful.

Chart no. 19 Helpfulness of Information

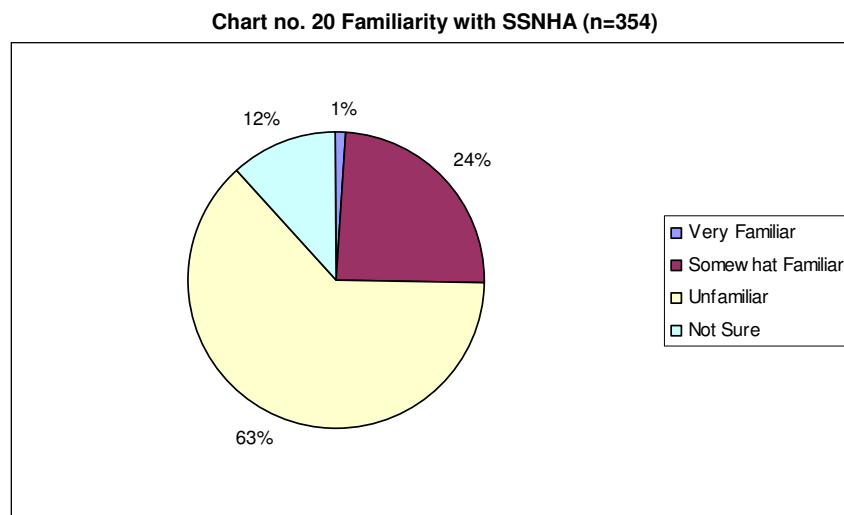


Source: UNI-STEP; 2003-04 SSNHA Museums Visitor Study

Of those who responded, a majority of visitors (68.4%) found the information about what to see and do to be the most helpful (chart no. 19). Only a small percentage (3.3%) of those people found the same information to be not at all helpful. Visitors also found the information found on museums to be very helpful with a response rate of 69.3%. The information found on accommodations and where to stay was the least helpful with a very helpful rating of 46.5%.

4. Familiarity of SSNHA

Visitors to the Silos and Smokestacks National Heritage Area Museums were asked in the questionnaire about their familiarity with SSNHA. They were asked if they were very familiar, somewhat familiar, unfamiliar or not sure.



Source: UNI-STEP; 2003-04 SSNHA Museums Visitor Study

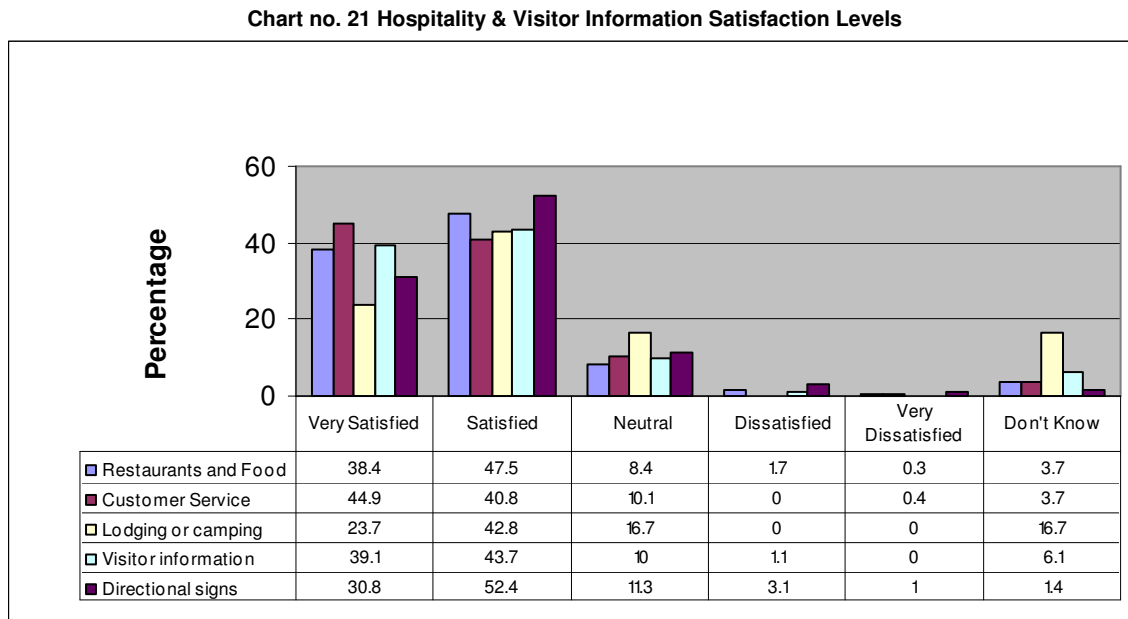
Of the 354 respondents who answered the question, 63% were unfamiliar with the SSNHA (chart no. 20). Only 1% or 4 of the 354 people were very familiar with the Silos and Smokestacks National Heritage Area. Twelve percent were not sure and 24% were somewhat familiar with the area.

E. Visitor Satisfaction

The last section of the questionnaire contained questions pertaining to the overall satisfaction visitors had while in the region. Respondents were asked questions concerning hospitality and visitor information, cultural/historical attractions, activities/things to do, and overall visitor satisfaction.

1. Hospitality & Visitor Information

In order to rate the hospitality and visitor information a respondent received while in the area, questions pertaining to food and restaurants, customer service, lodging or camping, visitor information and directional signage were asked.



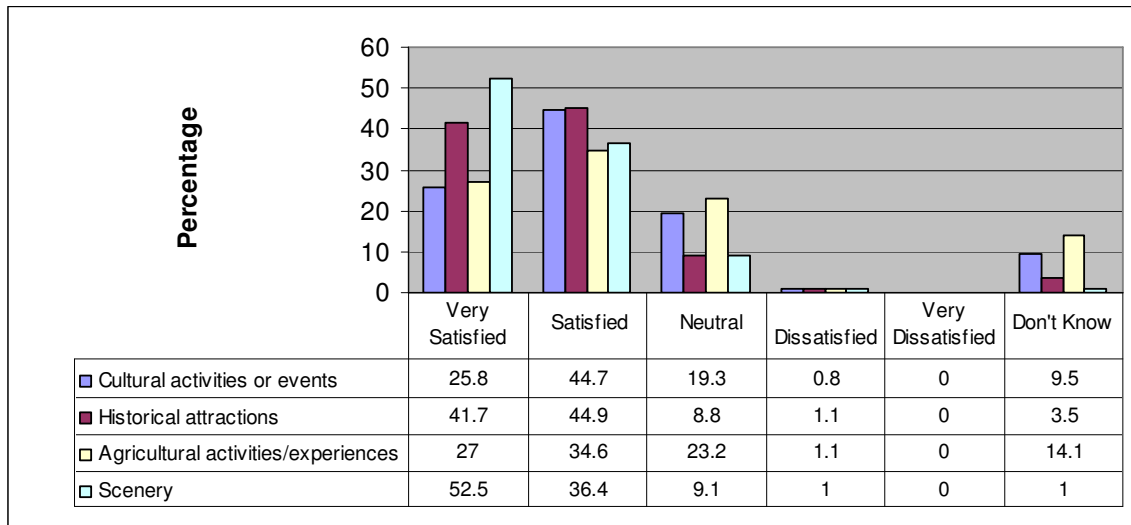
Source: UNI-STEP; 2003-04 SSNHA Museums Visitor Study

As chart number 21 illustrates, most of the respondents reported being very satisfied or satisfied with the hospitality and visitor information within the region visited. Of those surveyed, 39.1% were found to be very satisfied with the visitor information, while only 1.1% were found to be dissatisfied with the visitor information. Only one was found to be very dissatisfied with the restaurants and food, customer service, and directional signage.

2. Cultural/Historical Attractions

Visitors were asked to rate their satisfaction concerning the cultural and historical attractions around the area. These attractions covered cultural activities and events, historical attractions, agricultural attractions, and scenery.

Chart no. 22 Cultural and Historical Attractions Satisfaction Levels



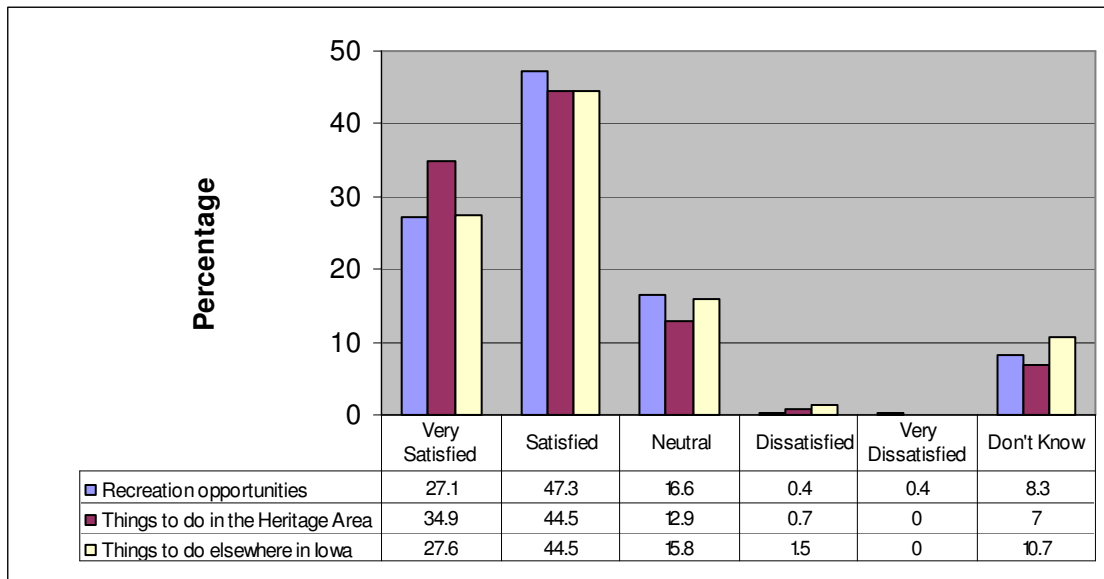
Source: UNI-STEP; 2003-04 SSNHA Museums Visitor Study

Respondents of the questionnaire found the scenery to be very satisfying at 52.5% (chart no. 22). Most people about 61% were either satisfied or very satisfied with the agricultural activities offered. None of the respondents found any of the cultural and historical attractions to be very dissatisfying.

3. Activities/Things to Do

Finally, visitors were asked to rate their satisfaction based on activities and things to do. Categories included in this grouping were: recreation opportunities, things to do at SSNHA museums, and things to do elsewhere in Iowa.

Chart no. 23 Activities/Things to Do Satisfaction Levels



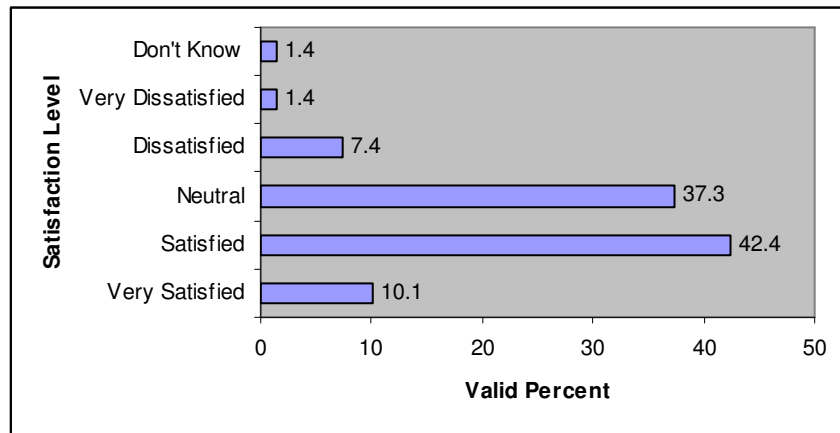
Source: UNI-STEP; 2003-04 SSNHA Museums Visitor Study

Respondents were most often found to be satisfied or very satisfied with the things to do at the museums nearly 80%. Recreation opportunities were also found to be very satisfying for 27.1% of the visitors, while nearly 45% of the visitors were satisfied. Visitors generally were satisfied with what the SSNHA museums had to offer.

4. Overall Satisfaction

Visitors of the SSNHA Museums were asked to rate their overall satisfaction of the region in which they visited.

Chart no. 24 Overall Satisfaction (n=217)



Source: UNI-STEP; 2003-04 SSNHA Museums Visitor Study

A majority of the respondents were found to be either satisfied or very satisfied with the region (chart no. 24). Thirty-seven percent of the visitors were found to be neutral about the region. Only 8.8% were dissatisfied with the region.

V. Conclusions & Recommendations

A. Trip Characteristics

The SSNHA Museums rely on first time visitors. Most of the trips (63%) are first time trips. Visitors who have been to the region previously have had, on average, approximately five trips to the region. The primary purpose of the trip for most of the visitors (35%) was specifically to visit this heritage site. Two other main reasons for traveling included visiting friends/family (25%) and it was a side trip on the way to another primary destination (21%). Most of the visitors staying overnight had their primary purpose of the visit as visiting friends and relatives.

A little over half of the visitors were on an overnight trip (54%) and the other half on a day trip (46%). This has important implications in terms of developing cooperative marketing strategies between the lodging industry and these attractions. In day trips, most visitors (46%) stayed from one to three hours (51.9%), and those on an overnight trip (53%) stayed one to three nights (76.7%). On average people on overnight trips spent almost five days in the area, compared to three and half days according the visitor's center data. Visitors were as likely to stay with friends and relatives (23%) as they were to stay in a hotel or bed and breakfast (22.5%).

This data does not represent visitors on an organized tour. Only 7% of the visitors were part of an organized group. The median party size was two, with 72.3% of the visitors stating they were traveling in a party of one to three persons.

B. Visitors Demographic Profile

Generally the visitor to the SSNHA Museums, for 43% of the respondents, is 51 years of age and above. The average age is 52 years old, which is similar to the average visitors' age resulting from visitor's center data which is 54 years old. Most of the visitors (57%) are women,

and 43% of the visitors are men. The majority of visitors (57.9%) either went to college or graduated from college and 14.6% of those held a postgraduate degree. The largest group of visitors (20%) had an income ranging between \$50,000 and \$74,999. Almost 17% of the visitors indicated their income level at \$35,000 to \$49,999. The median household income in Iowa is \$39,469.

C. Spending Assessment

Six categories of spending were selected: lodging, restaurants, grocery/convenience stores, transportation, admissions, and shopping. On average visitors to the SSNHA Museums spent more on lodging and shopping than amounts spent by visitors as collected by the Iowa visitor centers in the region. The average amount per party size (median=2) for lodging expenditures was \$204.39, as compared to \$61.50 as reported by visitor center's data. Visitors spent an average of \$81.03 shopping, compared to \$29.54 as reported by visitor's center data. Average spending in restaurants was \$75.90, on groceries was \$37.50 and on transportation was \$43.79, similar to data collected by visitor's centers. The average amount spent on admissions was \$31.50.

First time visitors spent on average significantly more than repeat visitors on lodging and transportation. Males were found to spend on average significantly more than women on lodging, restaurants, groceries, transportation, admissions, and shopping.

The average amount spent on lodging for visitors whose primary trip purpose was specifically to visit the heritage site was significantly higher than that of visitors being on a side trip or stopping on a trip to another destination. Visitors whose primary trip purpose was to visit friends and relatives spent significantly more at restaurants than those visitors on a business trip.

D. Marketing Assessment

Most of the visitors (65%) did not receive any information before they left on their trip, and since 44% did not plan at all before taking the trip. In addition, 38.2% of the visitors did not see any advertisements for the region before they visited. The most common medium where they saw some form of advertisement before visiting the region was the newspaper (13.9%). While they were in Iowa, the most common place to receive information was at local visitor bureaus (25.1%), followed by place of accommodation (19.7%). Those that received information thought the information was very helpful. Information of what to see and do (68.4%) and information about museums (69.3%) were found to be the most helpful. A majority of the visitors (63%) were not familiar with the SSNHA.

Since visitors did not plan before leaving on their trip to the SSNHA, information and brochures at the attractions and places of accommodation relating to the SSNHA are needed. Also a marketing strategy should be developed in order reach people before they get to the area because visitors are not seeing any advertisements for the heritage area until they are already here.

E. Visitor's Satisfaction

Generally visitors were satisfied or very satisfied with the hospitality and visitor information, cultural/historical attractions and things to do in the region. More than half of those who responded (52.5%) were very satisfied with scenery. There was high level of satisfaction expressed for cultural activities (44.7%) and historical attractions (44.9%).

F. Overall Results Compared with Museum Results

Table no. 6 Museums vs. Overall Sites

Site Category/ Variables	Museums	Overall
First time/ Repeat Visitors	First time Visitors 63% Repeat Visitor 37%	First time visitors 37% Repeat Visitor 63%
Organized or not Group	Organized Group 7% Not Organized Group 93%	Organized Group 11% Not Organized Group 89%
Average Trips	4.63	5.27
Overnight Trips (in %)	54.0	48.0
Primary Purpose of Trip	Specifically to visit this site 35.0%	Specifically to visit this site 31.2%
Average Age	52.0	51.0
Gender	Female 57% Male 43%	Female 49% Male 51%
Highest Average on Spending per Party Size (median =2)	Lodging \$204.39	Lodging \$175.40
Highest Total Average Spending per Party Size	234.8	236.3

Source: UNI-STEP; 2003-04 SSNHA Museums Visitor Study

Table 6 shows the differences in visitor characteristics between the SSNHA Museums and to the overall findings of all SSNHA partner sites. The SSNHA Museums report that 63% of their visitors are visiting for the first time, whereas the overall survey found the complete opposite with 63% having reported visiting the sites previously. On other categories, findings were similar. The average number of trips to museums was 4.63 trips and overall, the amount of trips to any SSNHA site was 5.27. Museums and also all SSNHA sites reported that the primary purpose of visiting the area was to specifically visit the heritage site.

References

STEP-UNI. (2003-2004). Economic impact and visitor study of SSNHA.

Prideaux, B.R. and Kininmont, L.J. (1999). Tourism and heritage are not strangers: a study of opportunities for rural heritage museums to maximize tourism visitation. *Journal of Travel Research*. v.37. i.3.

Appendix 1
Silos & Smokestacks National Heritage Area Tourism Study

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

1. Is this your first trip to this region? (See Map)
Yes
No, if no how many other trips have you taken to this region in 2002-2003? _____ (# of trips)
2. What is the primary purpose of this trip? (Check one)
Specifically to visit this heritage site
This heritage site was a side trip or stop on a trip to another primary destination
Visiting friends or relatives
Business or combined business/pleasure trip
Special event or festival
3. Is your visit to the region part of a: Day trip or Overnight trip

If an overnight trip, what type of lodging are you using or do you plan to use in the local area?
Hotel or motel
B & B
Campground
Staying with friends or relatives in the area
Staying overnight outside the local area or just passing through
4. How long have you spent, so far, in the local area?
_____ hours if on a day trip
_____ nights if an overnight trip
5. How much longer do you plan on staying in the local area?
_____ hours if on a day trip
_____ nights in an overnight trip
6. Did you travel to this region as part of an organized group tour?
Yes No
7. The total number of people (including yourself) in your immediate traveling party is: _____ people
8. Did you receive any travel information from this region before you left for this trip?
Yes No
9. How much did you plan this trip **before** you left home?
Planned our routes and stops carefully
Planned our route, but decided on stops as we went along
Little or no planning for either our route or our stops

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

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

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

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

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

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

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

Very familiar Somewhat familiar Unfamiliar Not Sure

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

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

Spending categories:

Spending in Northeast Iowa

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

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

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

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

About You

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

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

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

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

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

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

THANK YOU VERY MUCH FOR YOUR INFORMATION!

Appendix 2

t-tests

First Trip to region vs. Spending Categories

Group Statistics						
	first trip to region	N	Mean	Std. Deviation	Std. Error Mean	
Lodging	1	55	253.0363636	287.0513	38.70598805	
	2	49	149.7959184	138.5612	19.79445783	
Restaurants	1	70	82.61428571	77.50985	9.264198836	
	2	132	72.00606061	77.75755	6.767926202	
Groceries	1	36	32.83333333	30.35269	5.058781458	
	2	69	40.1884058	50.61251	6.093029691	
Transportation	1	48	58.27083333	67.93042	9.804911726	
	2	75	34.52666667	40.31488	4.655161751	
Admission	1	45	32.43333333	30.78732	4.589502735	
	2	74	31.08783784	34.50604	4.01124574	
Shopping	1	52	103.3653846	101.8888	14.12943903	
	2	76	66.48684211	69.46683	7.968391359	

		Levene's Test for Equality of Variances		t-test for Equality of Means
		F	Sig.	t
Lodging	Equal variances assumed	9.108545913	0.003213342	2.290245
	Equal variances not assumed			2.374772
Restaurants	Equal variances assumed	0.078654321	0.779419267	0.923714
	Equal variances not assumed			0.924624
Groceries	Equal variances assumed	2.81651222	0.096330667	-0.79909
	Equal variances not assumed			-0.92875
Transportation	Equal variances assumed	7.958490882	0.005595732	2.433512
	Equal variances not assumed			2.187619
Admission	Equal variances assumed	0.052538384	0.819103932	0.214665
	Equal variances not assumed			0.22074
Shopping	Equal variances assumed	2.285661938	0.13307848	2.436314
	Equal variances not assumed			2.273439

df	Sig. (2-tailed)	Mean Difference	Std. Error Difference	95% Confidence Interval of the Difference	
				Lower	Upper
102	0.024066	103.2404	45.07834	13.82777	192.6531
79.79889378	0.019961	103.2404	43.47383	16.72142	189.7595
200	0.356748	10.60823	11.48432	-12.0377	33.25411
141.1304686	0.35674	10.60823	11.47302	-12.073	33.28942
103	0.426078	-7.35507	9.204336	-25.6097	10.89956
100.9053057	0.355237	-7.35507	7.919361	-23.0651	8.354988
121	0.016415	23.74417	9.757159	4.427297	43.06104
68.37065121	0.03212	23.74417	10.85389	2.087702	45.40063
117	0.830402	1.345495	6.267874	-11.0677	13.75869
101.2766113	0.825739	1.345495	6.095378	-10.7457	13.43668
126	0.016236	36.87854	15.13702	6.922817	66.83427
82.8975743	0.025586	36.87854	16.22148	4.614088	69.143

Gender vs. Spending Categories

Group Statistics						
	Q19b	N	Mean	Std. Deviation	Std. Error Mean	
Lodging	1	34	149.6764706	106.8076	18.31735103	
	2	51	163.745098	229.4116	32.12404686	
Restaurants	1	99	65.19191919	68.65987	6.900576083	
	2	88	84.94318182	82.12149	8.754180341	
Groceries	1	46	35.47826087	32.30187	4.762650495	
	2	50	36.02	49.05369	6.937239938	
Transportation	1	50	35.95	44.42194	6.282210874	
	2	56	49.58928571	61.99554	8.284501913	
Admission	1	60	30.95	34.84137	4.498001753	
	2	45	35.28888889	30.4083	4.533001572	
Shopping	1	57	76.87719298	82.94686	10.98657959	
	2	49	78.87755102	90.00732	12.85818887	

		Levene's Test for Equality of Variances	t-test for Equality of Means	
		F	Sig.	t
Lodging	Equal variances assumed	2.334665065	0.130324342	-0.33379
	Equal variances not assumed			-0.38044
Restaurants	Equal variances assumed	2.255359949	0.134857407	-1.79057
	Equal variances not assumed			-1.7719
Groceries	Equal variances assumed	0.614405644	0.435104487	-0.06332
	Equal variances not assumed			-0.06438
Transportation	Equal variances assumed	3.309154849	0.071772266	-1.28796
	Equal variances not assumed			-1.31184
Admission	Equal variances assumed	0.000355353	0.984996597	-0.66632
	Equal variances not assumed			-0.67944
Shopping	Equal variances assumed	0.396390019	0.530340218	-0.11901
	Equal variances not assumed			-0.11828

df	Sig. (2- tailed)	Mean Difference	Std. Error Difference	95% Confidence Interval of the Difference	
				Lower	Upper
83	0.739381	-14.0686	42.14836	-97.9	69.76277
75.67780713	0.704681	-14.0686	36.97945	-87.7247	59.5874
185	0.074998	-19.7513	11.03073	-41.5135	2.010927
170.3262165	0.078198	-19.7513	11.14691	-41.7551	2.252624
94	0.949648	-0.54174	8.555906	-17.5297	16.44621
85.41414058	0.948818	-0.54174	8.414757	-17.2714	16.18788
104	0.200619	-13.6393	10.58986	-34.6394	7.360802
99.50758955	0.192593	-13.6393	10.39707	-34.268	6.989463
103	0.506697	-4.33889	6.511736	-17.2534	8.575604
100.5824215	0.498417	-4.33889	6.385932	-17.0075	8.329719
104	0.905495	-2.00036	16.80793	-35.3311	31.3304
98.61687904	0.90609	-2.00036	16.91266	-35.5604	31.55963

One-way ANOVA

		Sum of Squares	df	Mean Square	F	Sig.
Lodging	Between Groups	712570.5336	4	178142.6334	3.565709	0.009276
	Within Groups	4896075.214	98	49959.95116		
	Total	5608645.748	102			
Restaurants	Between Groups	64276.62961	4	16069.1574	2.730945	0.030339
	Within Groups	1159168.185	197	5884.102464		
	Total	1223444.815	201			
Groceries	Between Groups	15058.2623	4	3764.565575	1.970402	0.104712
	Within Groups	192966.2377	101	1910.556809		
	Total	208024.5	105			
Transportation	Between Groups	5140.638108	4	1285.159527	0.435128	0.783009
	Within Groups	348515.3253	118	2953.519706		
	Total	353655.9634	122			
Admission	Between Groups	7702.970026	4	1925.742506	1.817936	0.130164
	Within Groups	120760.4039	114	1059.301789		
	Total	128463.3739	118			
Shopping	Between Groups	24254.05079	4	6063.512699	0.824179	0.51215
	Within Groups	912271.8252	124	7357.030848		
	Total	936525.876	128			