

City of Ames

Online Survey Results

Presentation to City Council
April 19, 2011

BRANDENDEAVOR

What is a vision?

A vision is a **promise** – which must be delivered upon consistently with every interaction

- **Emotion**
It is driven by how you want stakeholders to **feel** when they interact with you.
- **Differentiation**
Your promise should be **different** from promises made by competitors, describing a feeling only you give them.
- **Relevance**
It should be **meaningful** to stakeholders, focused on where their greatest needs intersect with your strengths.

The promise provides the focus for identity, communication and action

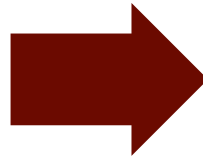


Project Scope

Discovery

Feb - April

- **Kickoff meeting with Steering Committee**
- **Stakeholder interviews**
(15 focus groups, 40 participants from different stakeholder groups)
- **Materials review**
- **Competitive/peer analysis**
(8 competitors)
- **Online survey**
(5,982 interviews)
- **Survey results presentation to Steering Committee and Council**



Analysis & Vision Development

April - June

- **Analysis and development of vision and platform**
- **Steering Committee presentation (+ refinement)**
- **Citizen workshops and vision extension**
(2 meetings + refinement)
- **Implementation recommendations**
- **Final presentations to Steering Committee and Council**
- **Final refinement & electronic document**

Research Objectives & Methodology

- Objective: To explore attitudes and opinions about the City of Ames from the perspective of the citizens, students, neighbors and those in surrounding Iowa cities. Insights gathered will be used to inform the development of a vision for the city.
- Methodology: An online survey was conducted among...
 - Citizens of Ames via website link and supported by PR efforts and email invites
 - Iowa State University students, alumni, faculty and staff via email lists
 - Residents of surrounding Iowa cities via purchased online panel
- The study was fielded March 14 – April 4, 2011 and yielded a total of 5,982 interviews, 333 of which were purchased from an online panel. The remainder were generated by the City of Ames.
- Confidence interval is +/- 1%
(meaning, if we repeated the survey, 95% of the time, we would get the same results)

Report Overview

- **Detailed Findings**
 - Who Did We Hear From?
 - Additional Respondent Demographics
 - Importance of City Attributes
 - Those Who Live In Ames
 - Those Who Work In Ames
 - The Connection To Iowa State University
 - Ames' Starting Point
 - The Competitive Landscape
 - Exploring Vision Concepts
 - What Makes Ames Unique?
 - The Appetite For Change
 - Respondent Psychographics
- **Recap / Executive Summary**
- **SWOT Analysis**
- **Next Steps**

Detailed Findings

Note: All charts may add to + or - 100% due to rounding error.

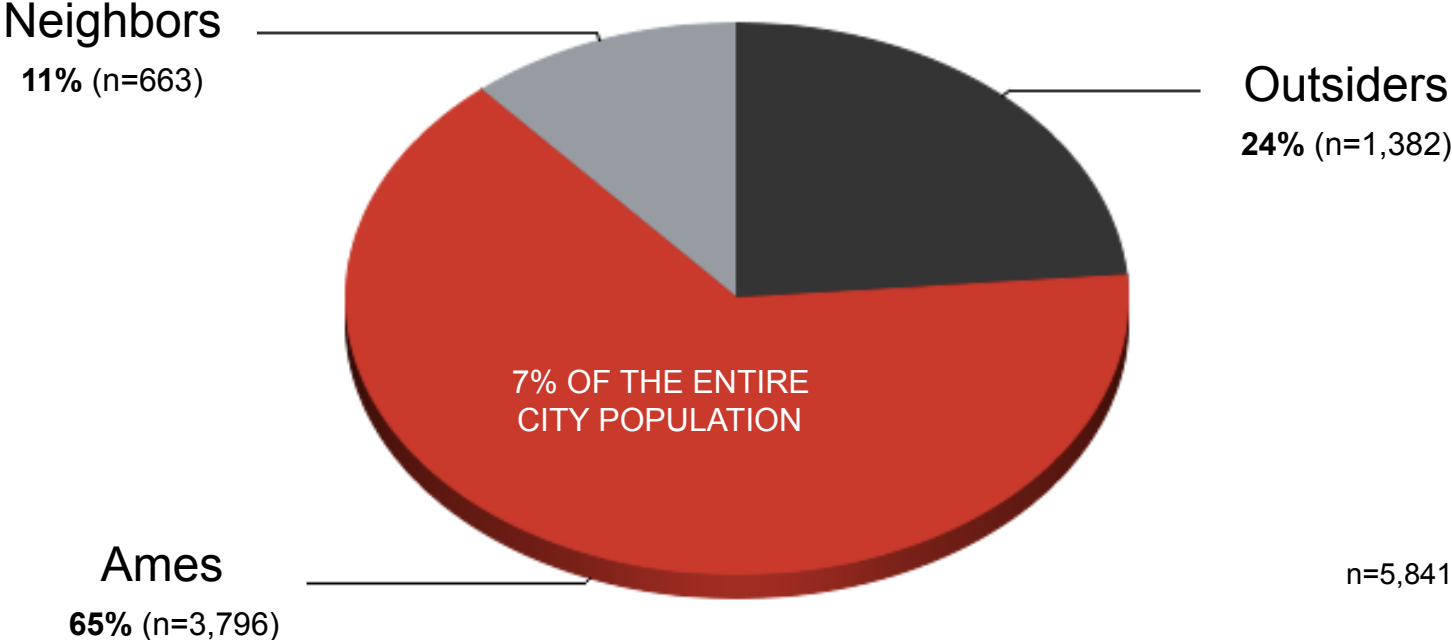
Who Did We Hear From?

Definitions of Segments

- **Ames residents**
Live within Ames city limits
- **Neighbors**
Live in rural Ames, Des Moines and West Des Moines, Gilbert and Ankeny
- **Outsiders**
Live outside 45-minute radius of Ames, almost entirely in Iowa
- **Actives**
Actively participate in city affairs
- **Passives**
Do not participate actively in city affairs, more than half are students
- **Non-Student Passives**
Sub-segment of passives that excludes students

Ames Residents vs. Neighbors/Outsiders

The majority of respondents were Ames residents living within the Ames city limits. Neighbors included rural Ames, Des Moines and West Des Moines, Gilbert and Ankeny. And outsiders included all others – generally those living 45 minutes or more from Ames, but still within the state of Iowa.



Q. Which Iowa city do you live in?

Breakdown by City

Significant differences are noted throughout the report according to three geographic segments:

1. **Ames** – Residents were considered those only within the city limits.
2. **Neighbors** – Including rural Ames, Ankeny, Des Moines, West Des Moines, and Gilbert.
3. **Outsiders** – All others remaining.

Q. Which Iowa city do you live in?

Answer	Response	%
Ames (within city limits)	3,796	65%
Rural Ames (unincorporated areas / Story County)	243	4%
Ankeny	132	2%
Cedar Falls	37	1%
Cedar Rapids	108	2%
Davenport	12	0%
Des Moines	163	3%
West Des Moines	89	2%
Dubuque	20	0%
Gilbert	36	1%
Iowa City	58	1%
Marshalltown	20	0%
Moline, IL	0	0%
Omaha, NE	19	0%
Rock Island, IL	2	0%
Sioux City	42	1%
Waterloo	27	0%
Other Iowa city (please specify)	807	14%
Other city just outside, but adjacent to Iowa (please specify)	83	1%

n=5,841
N/A = 147

Relationship to Ames

Answer	%
You live in Ames (within the city limits)	54%
You work in Ames	45%
You are a student at Iowa State University	34%
You formerly lived / worked in Ames, but no longer do so	15%
You are a parent of an Ames elementary, middle school, or high school student(s) in the Ames school district	10%
Other (please specify – mainly retirees)	10%
You were born / raised in Ames	9%
You live and / or work in a neighboring community to Ames	9%
N/A – You know a little bit about Ames, but do not have a direct relationship	6%
You are a parent of a student at Iowa State University	5%
You are a parent of an Ames elementary, middle school, or high school student(s) outside of the Ames school district (Gilbert or private schools)	3%

Respondents were primarily residents and those working in Ames.

One-third of respondents were students at Iowa State University.

n=5,667

Q. Which of the following describe your relationship to Ames, Iowa? (Select ALL that apply)

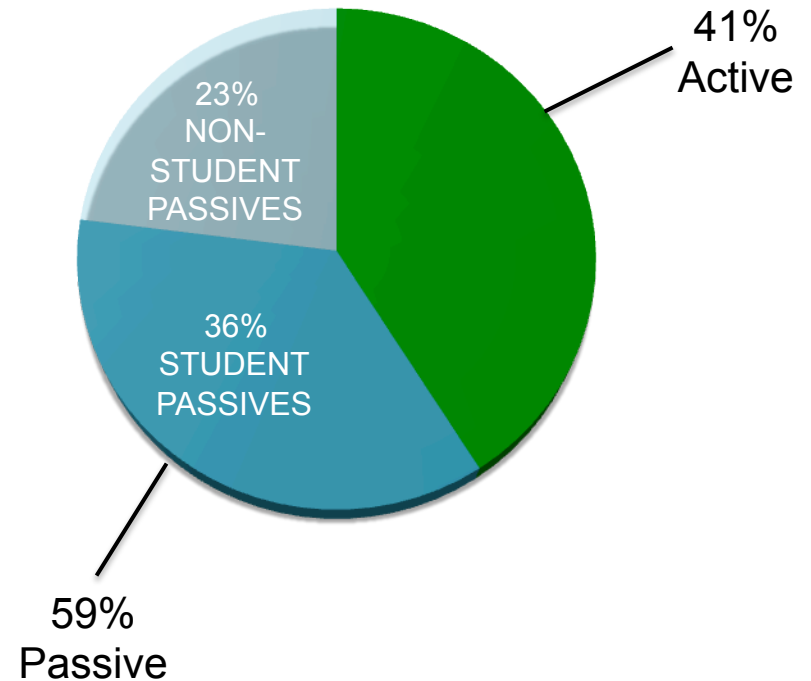
Participation in City Affairs

Ames residents were classified as either “Active” or “Passive” depending on their level of participation in city affairs.

Respondents participating in any of the following 5 activities were considered “Active”:

1. Attended a city council meeting, city public forum or open house
2. Written / called into the local news media (ex. Ames Tribune, local radio, etc.) about a city issue
3. Volunteered for something relating to city issues (please specify)
4. Been part of a city board / commission / task force
5. Ran for office

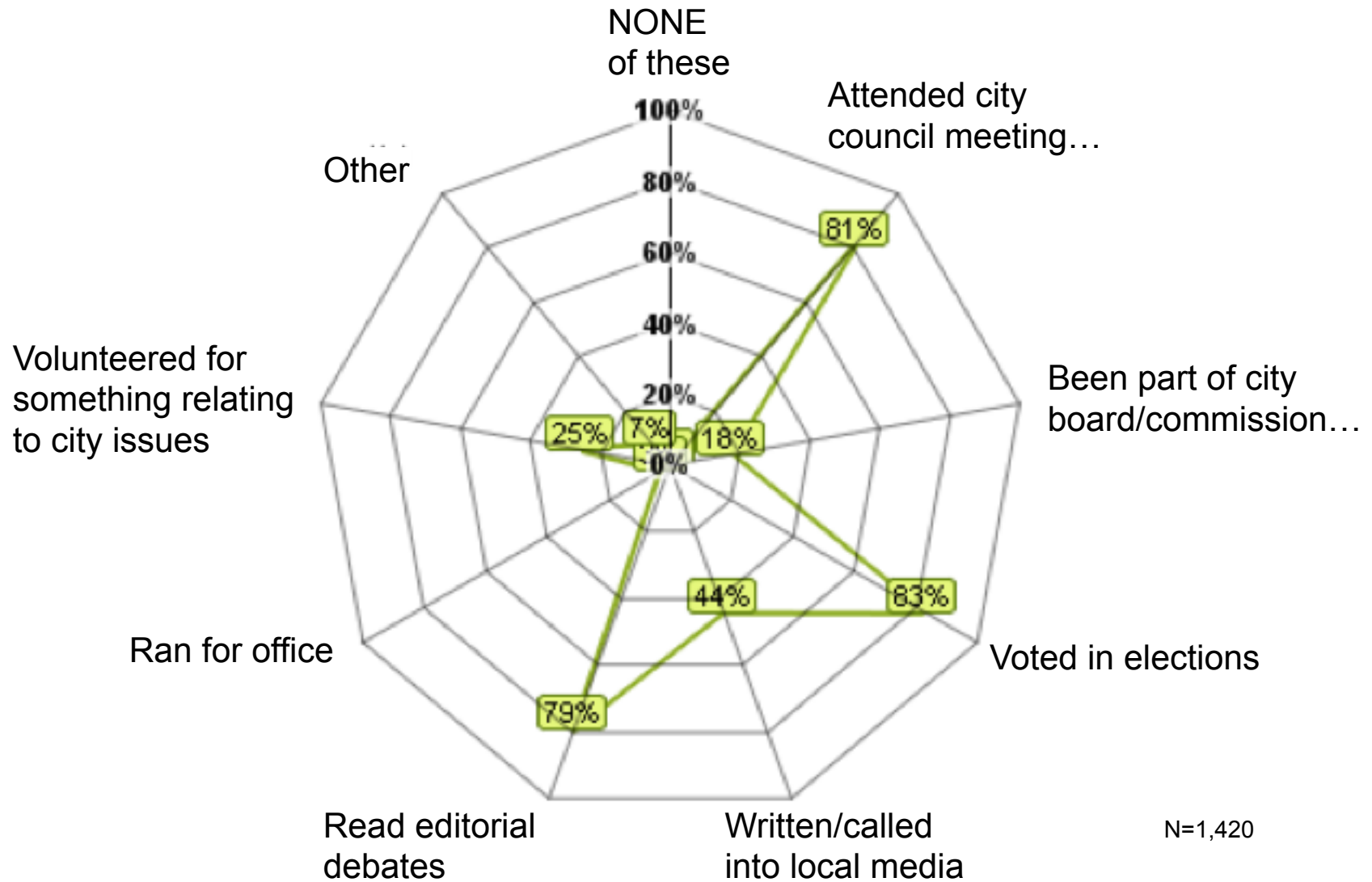
“Passives” could not have participated in any of the above activities.



n=3,472

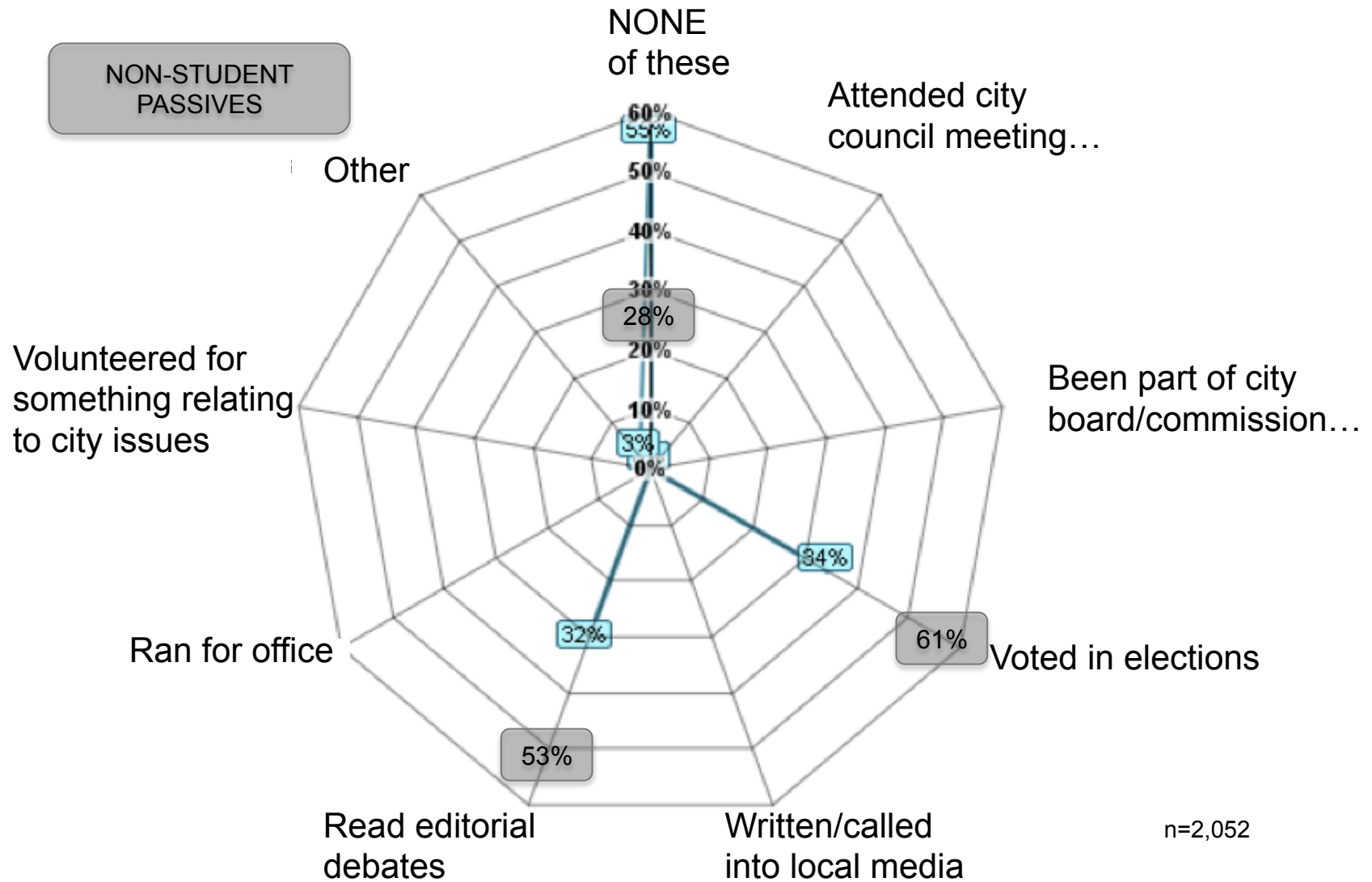
Q. To what extent have you participated in Ames city government and or city affairs in the past?
Have you... (Select all that apply)

Snapshot of Actives



Q. To what extent have you participated in Ames city government and or city affairs in the past?
Have you... (Select all that apply)

Snapshot of Passives



Q. To what extent have you participated in Ames city government and or city affairs in the past?
 Have you... (Select all that apply)

Employment Situation Ames Residents

Not surprisingly, the largest employer was Iowa State University. Retirees made up the second largest segment of respondents followed by those employed by the private sector. Note: This chart reflects all respondents, not just those working within the City of Ames.

Answer	# of Respondents	Ames
You are employed by Iowa State University	1,124	32%
N/A – Not currently employed, or you are retired	724	21%
You are employed by a company in the private sector	522	15%
You are a business owner / entrepreneur	191	6%
Other (please specify)	171	5%
You are employed in another area of the public sector	132	4%
You work for a not-for-profit organization/association	145	4%
You are employed by a hospital or other medical facility	142	4%
You are employed by the state or federal government	125	4%
You are employed by an Iowa State University auxiliary or affiliate	94	3%
You are employed by the Ames city government	93	3%

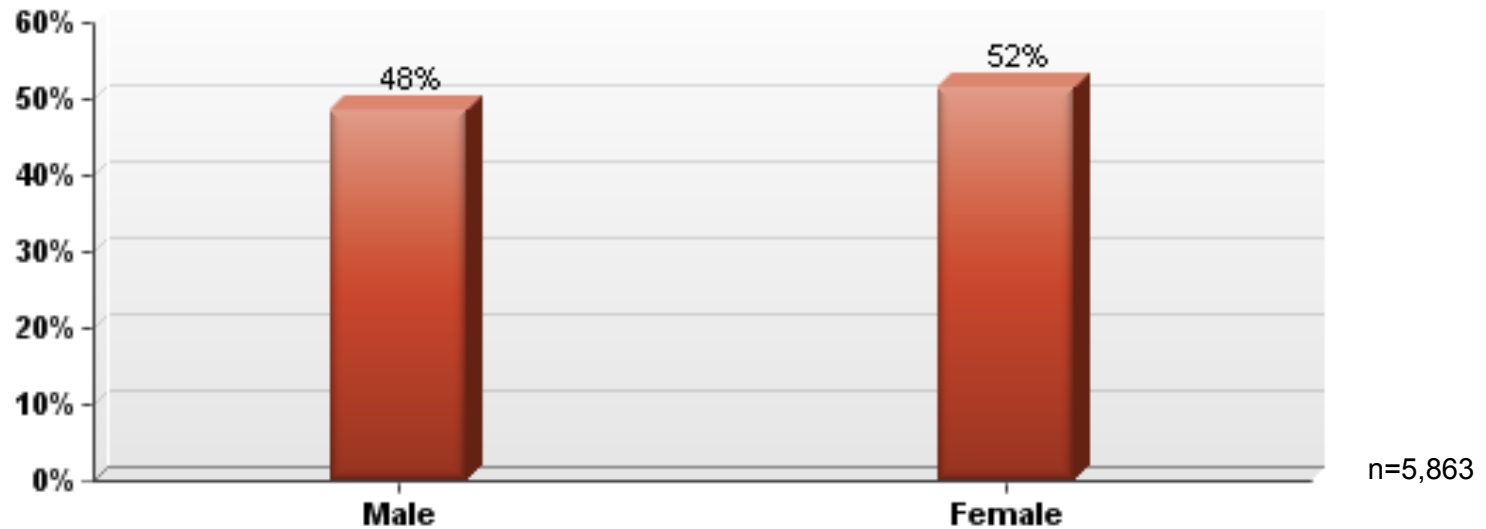
n=3,463 16

Q. Which ONE best describes your employment situation? (Select one)

Additional Respondent Demographics

Gender

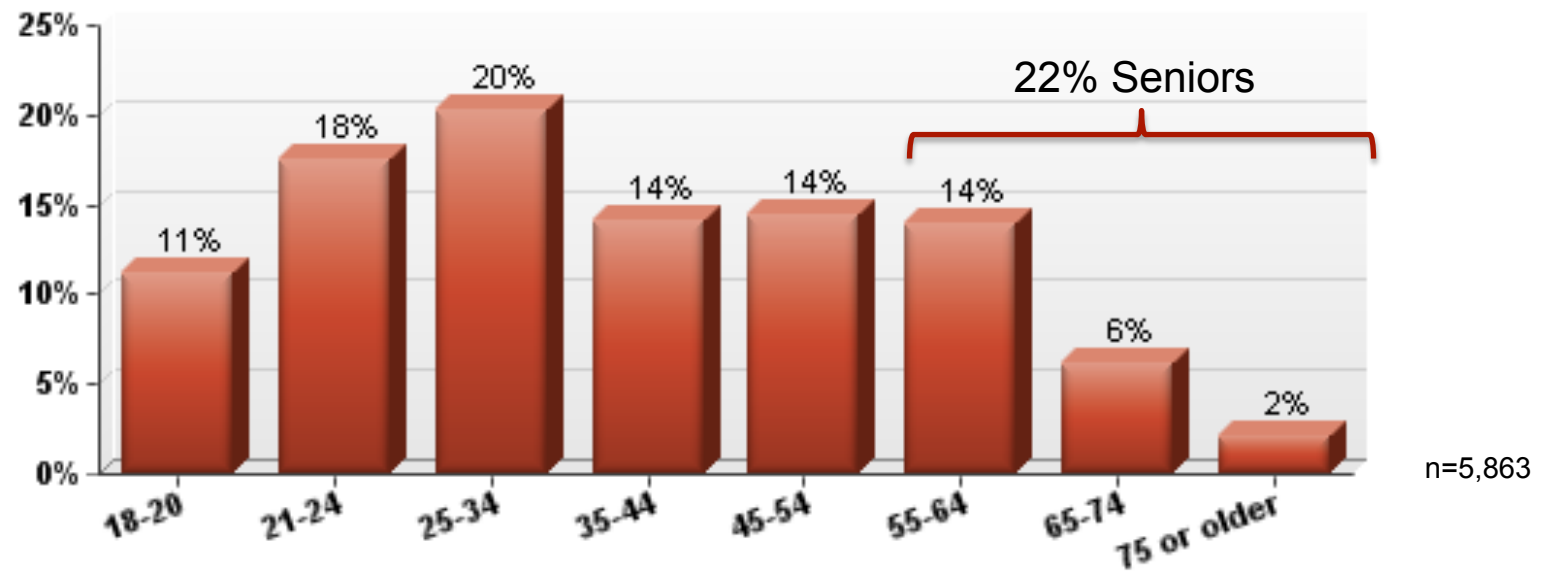
Gender was split nearly equally with approximately 50/50 M/F participation. There were slightly more females who completed the research.



Q. What is your gender?

Age

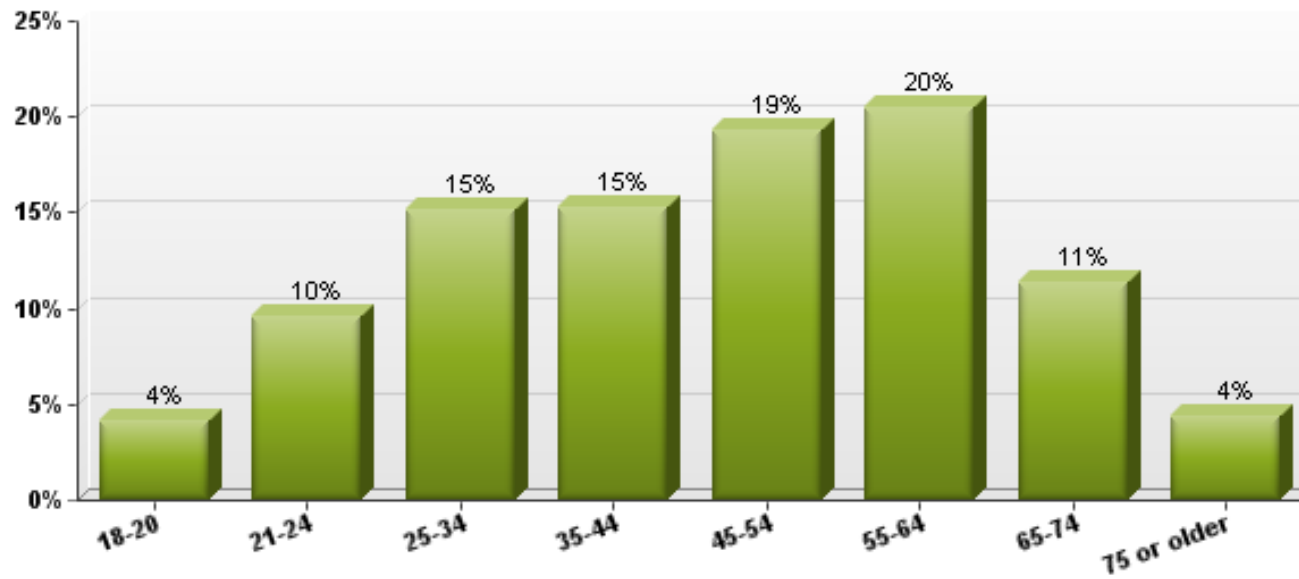
Approximately half of respondents were under age 35 and half were age 35+. And, there was a healthy representation of seniors despite the survey being conducted via an online methodology (1 in 5 or 22% were age 55+).



Q. Which of the following best describes your age group?

Age Actives

The majority of Actives are over the age of 45.

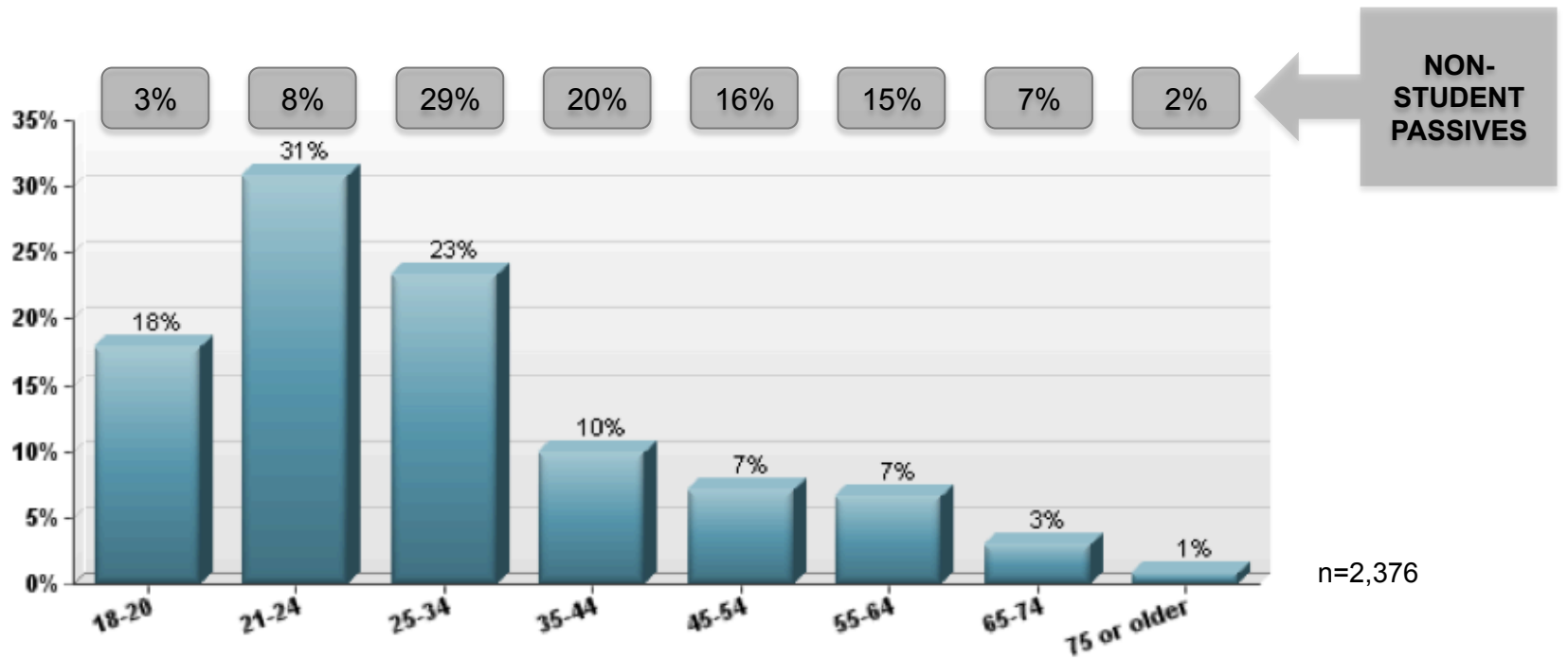


n=1,420

Q. Which of the following best describes your age group?

Age Passives

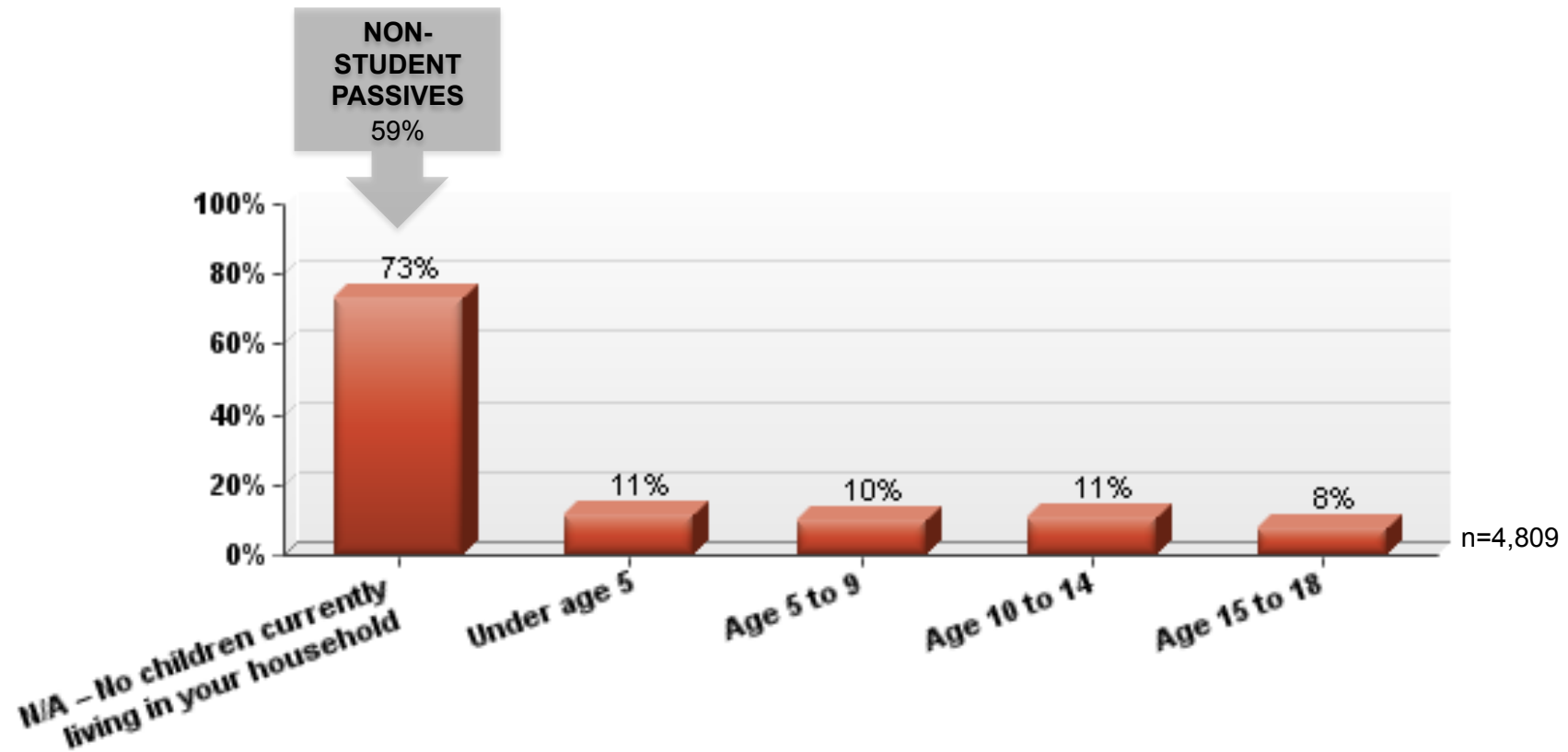
Passive residents skewed very young as the majority of them are students. Nearly half of passives (49%) were under the age of 25. However, when students were removed, most Non-Student Passives fell between the ages of 25-44 (49%).



Q. Which of the following best describes your age group?

Kids vs. No Kids

Approximately three-quarters of all respondents did not have kids in the household. However, the Non-Student Passives appear to be in a different life phase. Not only are they younger, they are also much more likely to have kids (41% vs. 27%).



Q. Do you have a child / children living in any of the following age groups living in your household?
(Select all that apply)

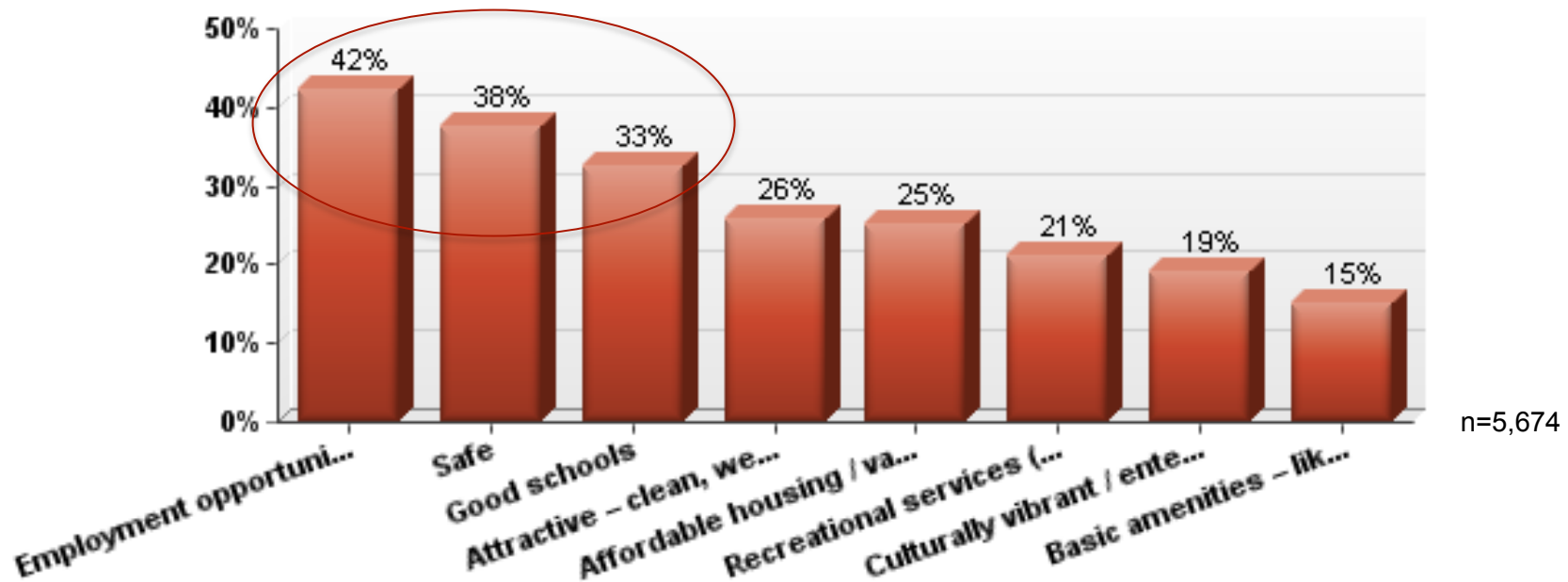
Importance of City Attributes

City Attributes Tested

- Safe
- Good schools
- Attractive – clean, well maintained
- Ethnically diverse
- Culturally vibrant / entertainment options
- Basic amenities – like banks, grocery stores, etc.
- Locally owned and operated shops and restaurants
- Availability of national chains (such as Kohl's, Wal-mart, Dillard's, Gap, Olive Garden, etc.)
- Recreational services (parks, trails, open spaces, gyms, pools, etc.)
- Convenient location – Interstate access and proximity
- Community events and sports
- Family / kid-friendly activities
- Medical care and facilities
- Higher learning opportunities
- Night-life opportunities
- Employment opportunities
- Affordable housing / variety of housing options

General City Attributes Top-8

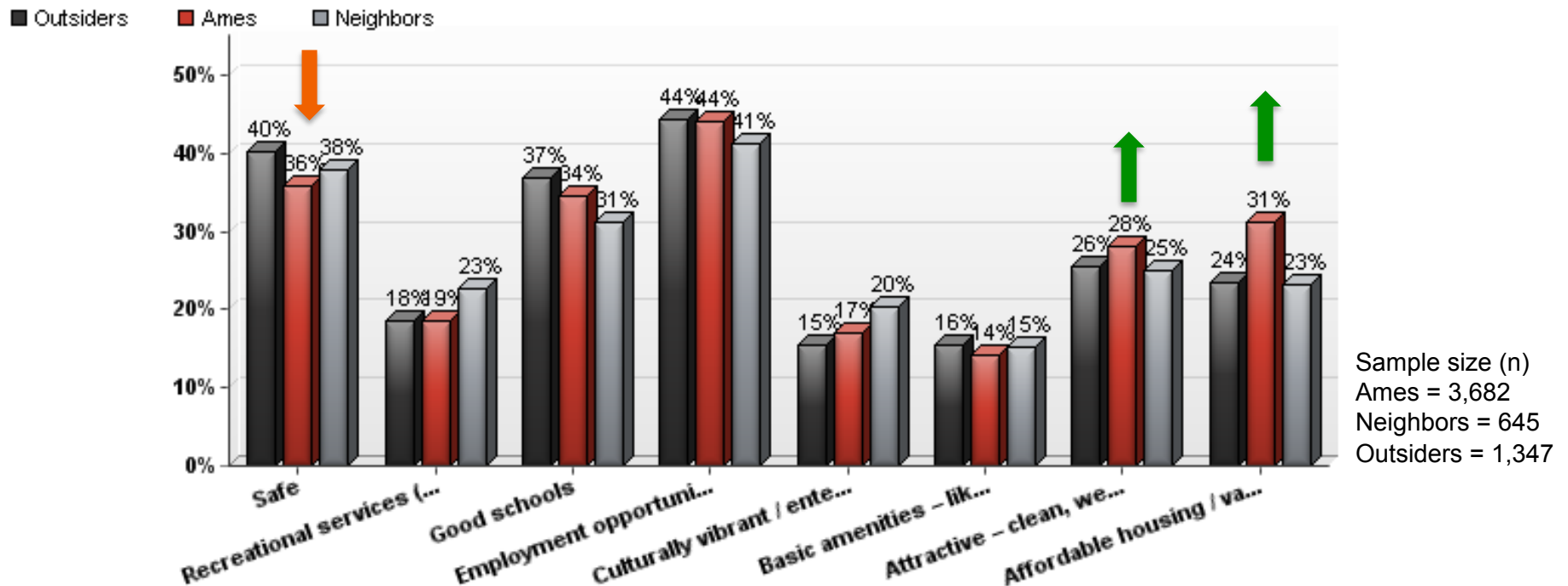
Note: Only the top-8 attributes were charted below. There are clearly a set of Top-3 attributes in terms of choosing a city to live / work in - #1 is employment opportunities followed by safety and good schools. All of these are rational drivers of choosing a city.



Q. When choosing a city to live or work in, which of the following attributes would be on your list of the Top-3 most important to you? (Select only 3)

General City Attributes by City of Residence

Looking at those same top-8 attributes, safety is not as important to residents of Ames who likely consider it a given. And Ames residents find affordable housing and an attractive / clean city more important than the other segments; therefore showing a point of difference for why one might choose Ames vs. other Iowa cities.

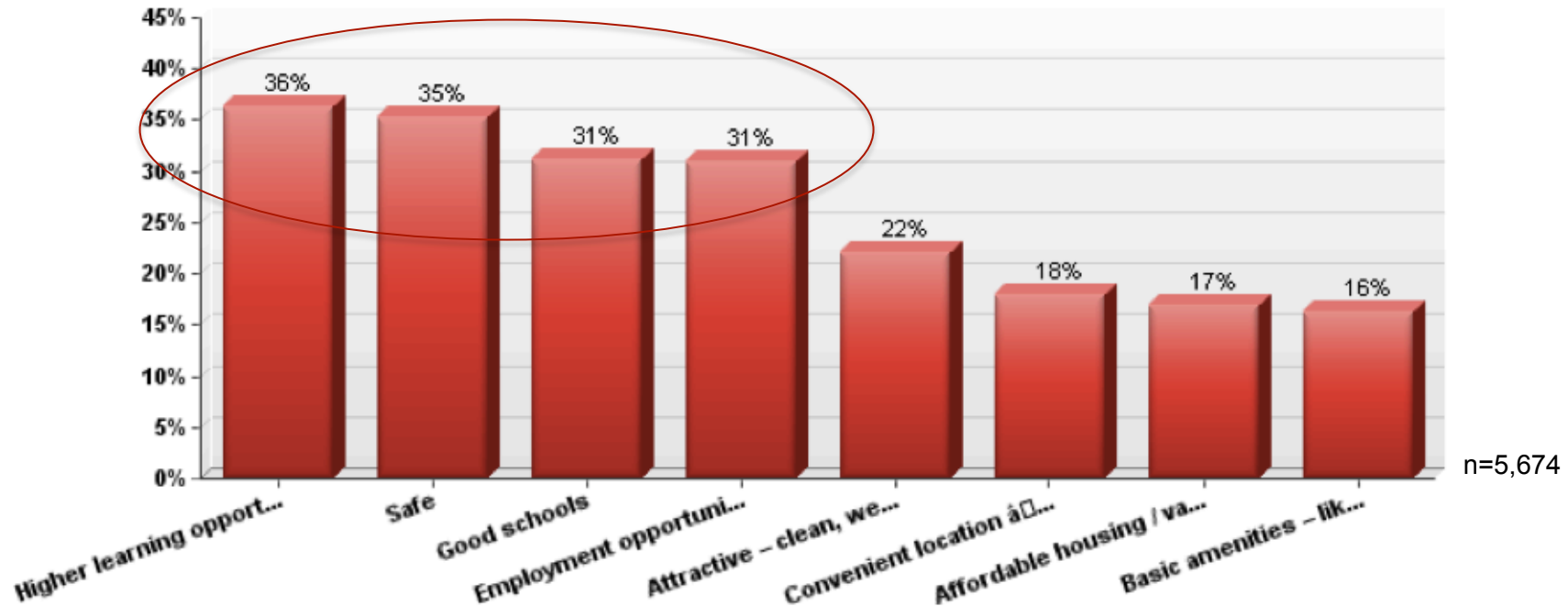


Q. When choosing a city to live or work in, which of the following attributes would be on your list of the Top-3 most important to you? (Select only 3)

Reasons for Choosing Ames

Top-8 / All Respondents

Higher learning opportunities clearly set Ames apart from other cities in general.

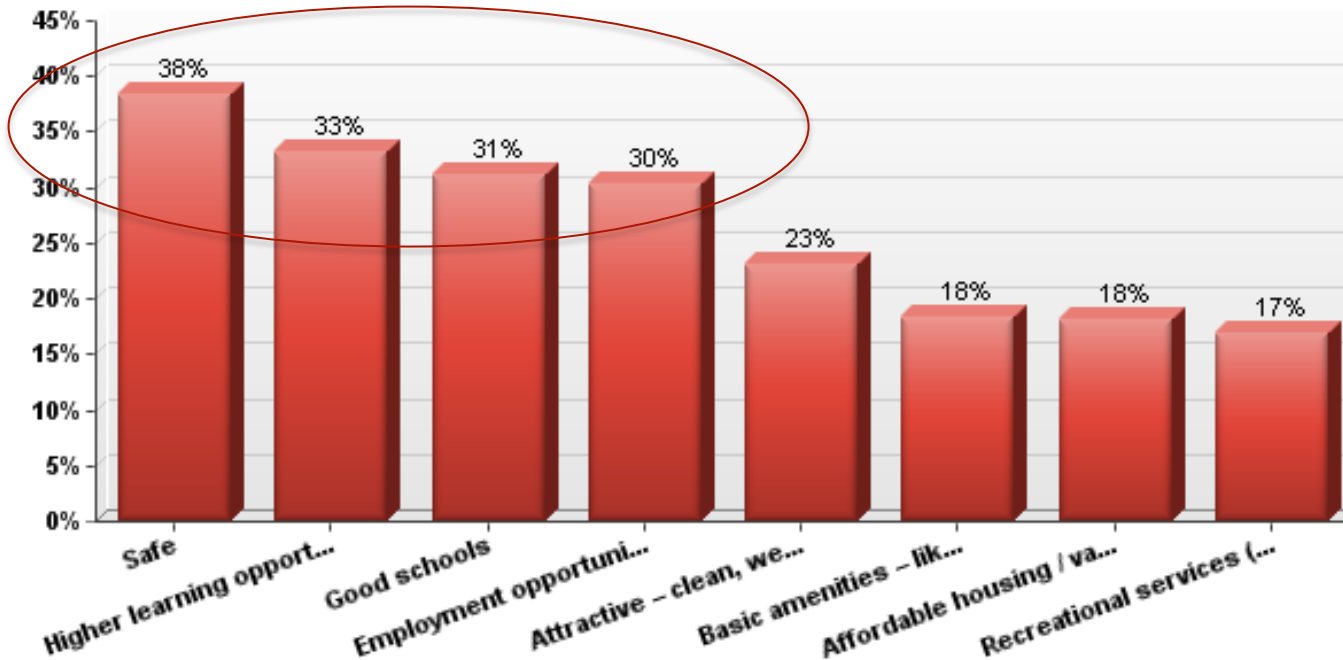


Q. Select your Top-3 reasons for living / working in Ames. If you do NOT live / work in Ames, select the Top-3 reasons why you think someone would. (Select up to 3)

Reasons for Choosing Ames

Top-8 / Ames Residents Only

For the most part the opinions of Ames residents are in line with the total population. Safety becomes the lead reason for choosing Ames, which explains why it is not as important to residents when choosing cities in general – because safety is not something they feel is lacking in Ames.



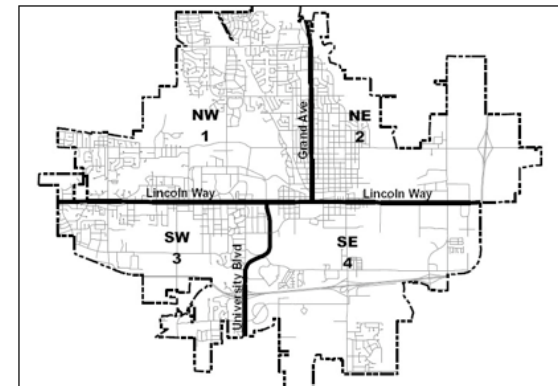
n=3,474

Q. Select your Top-3 reasons for living / working in Ames. If you do NOT live / work in Ames, select the Top-3 reasons why you think someone would. (Select up to 3)

Those Who Live in Ames

Geographic Representation

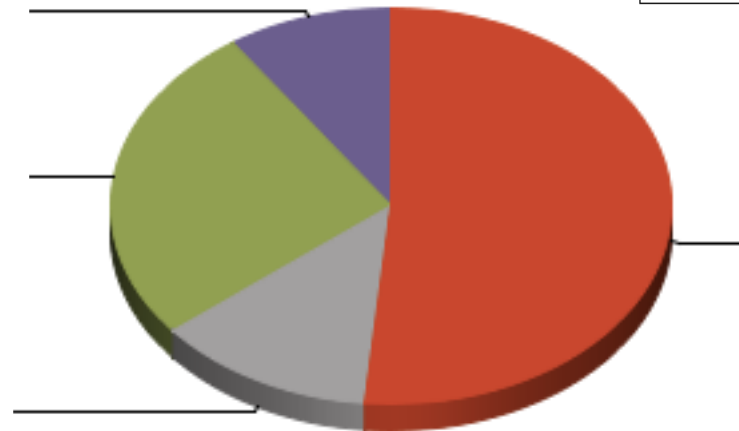
Respondents realistically represented the population density in Ames.



10%
Southeast

26%
Southwest

13%
Northeast



52%
Northwest

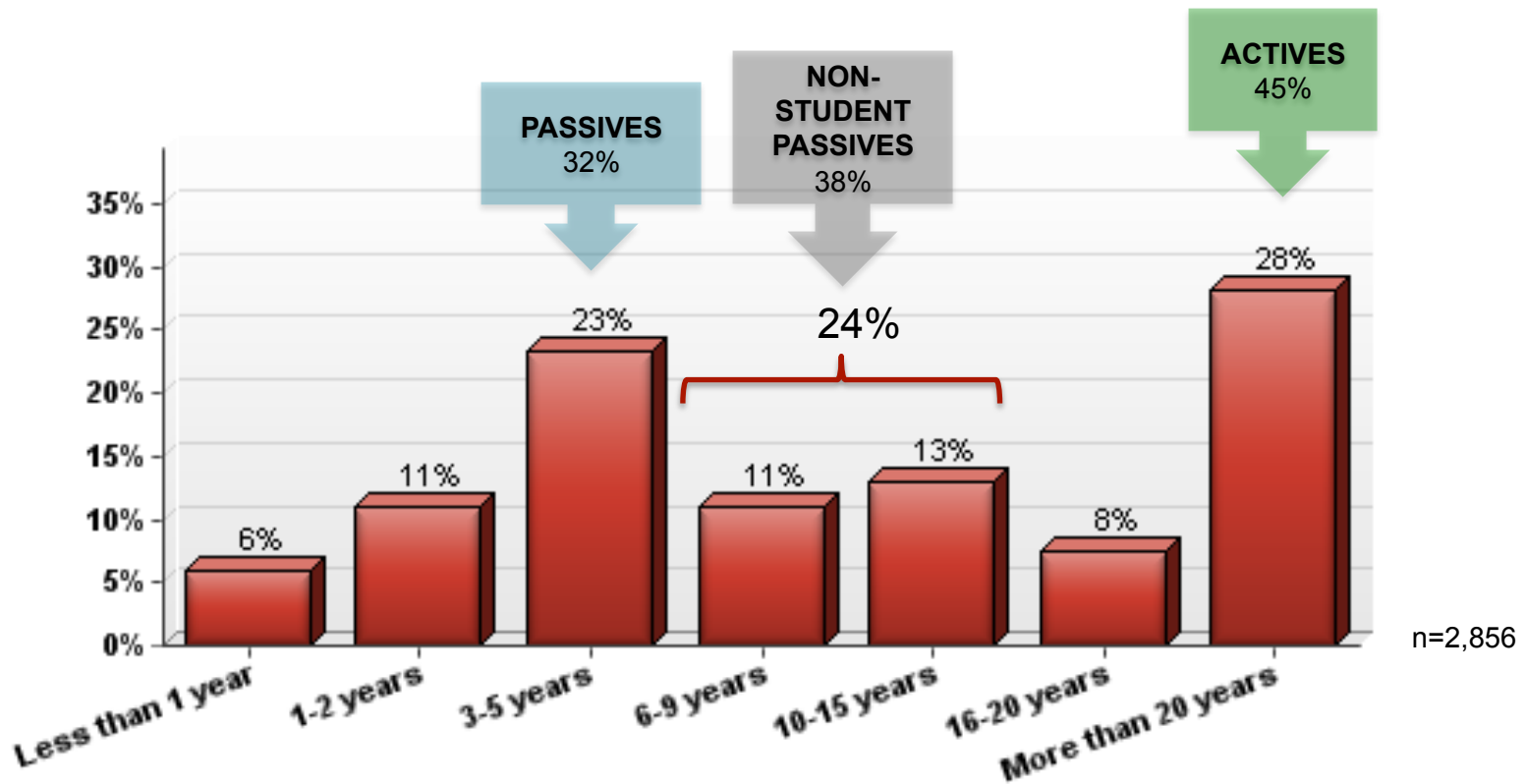
n=2,856

Q. And in which part (geographically) of Ames do you live? Refer to the map provided below to answer:

Duration of Residency

Most of our respondents were long-term residents. Approx. half (51%) have lived in Ames for less than 10 years. The remaining half (approx. – 49%) have lived in Ames for 10+ years. And, well over one-fourth have been residents for more than 20 years.

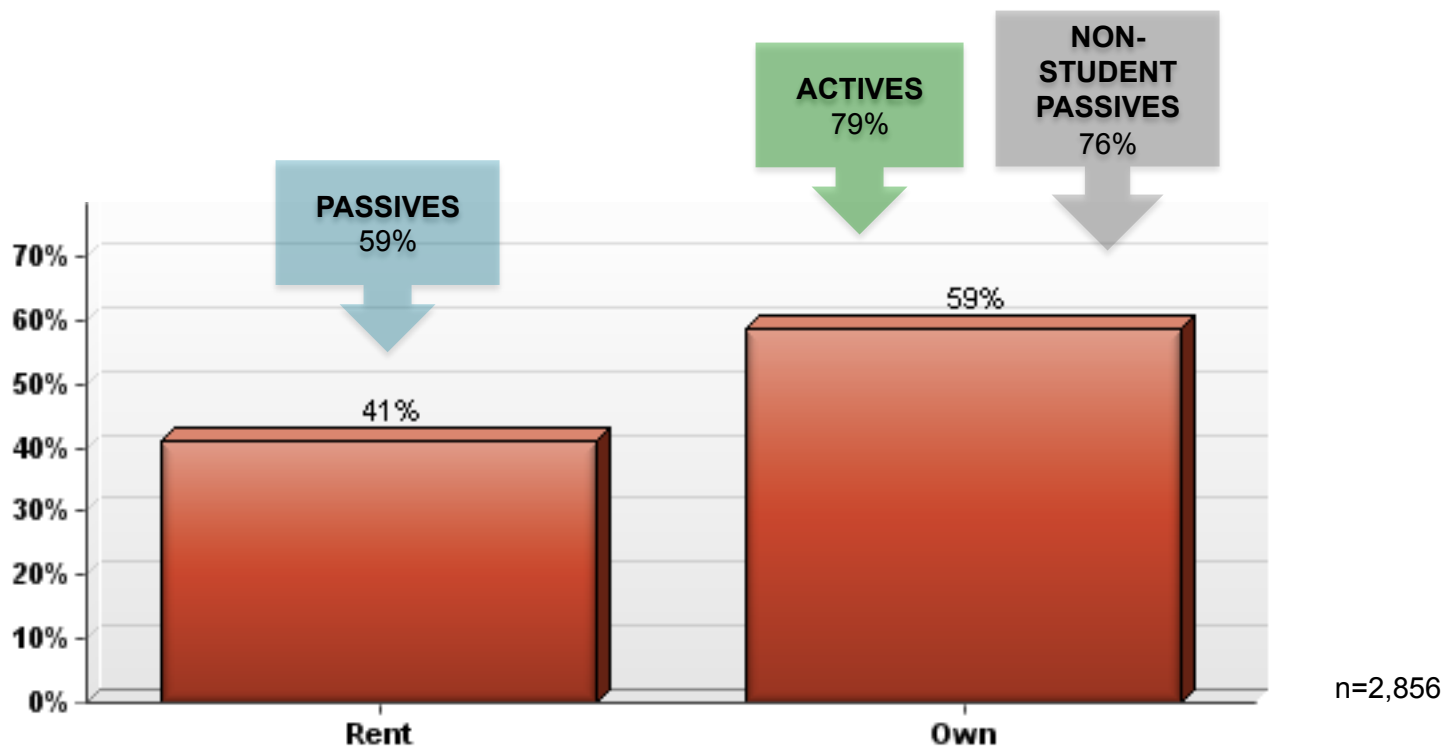
A strong trait of Actives is simply that they have lived in Ames much longer. Just under half of them have lived in Ames for more than 20 years.



Q. Approximately how long have you lived in Ames? (Select one from the drop down menu)

Home Ownership Residents Only

More than half of respondents were home owners vs. renters. Students clearly skew the renter percentage. Non-student Passives were no less likely to own a home than Actives.

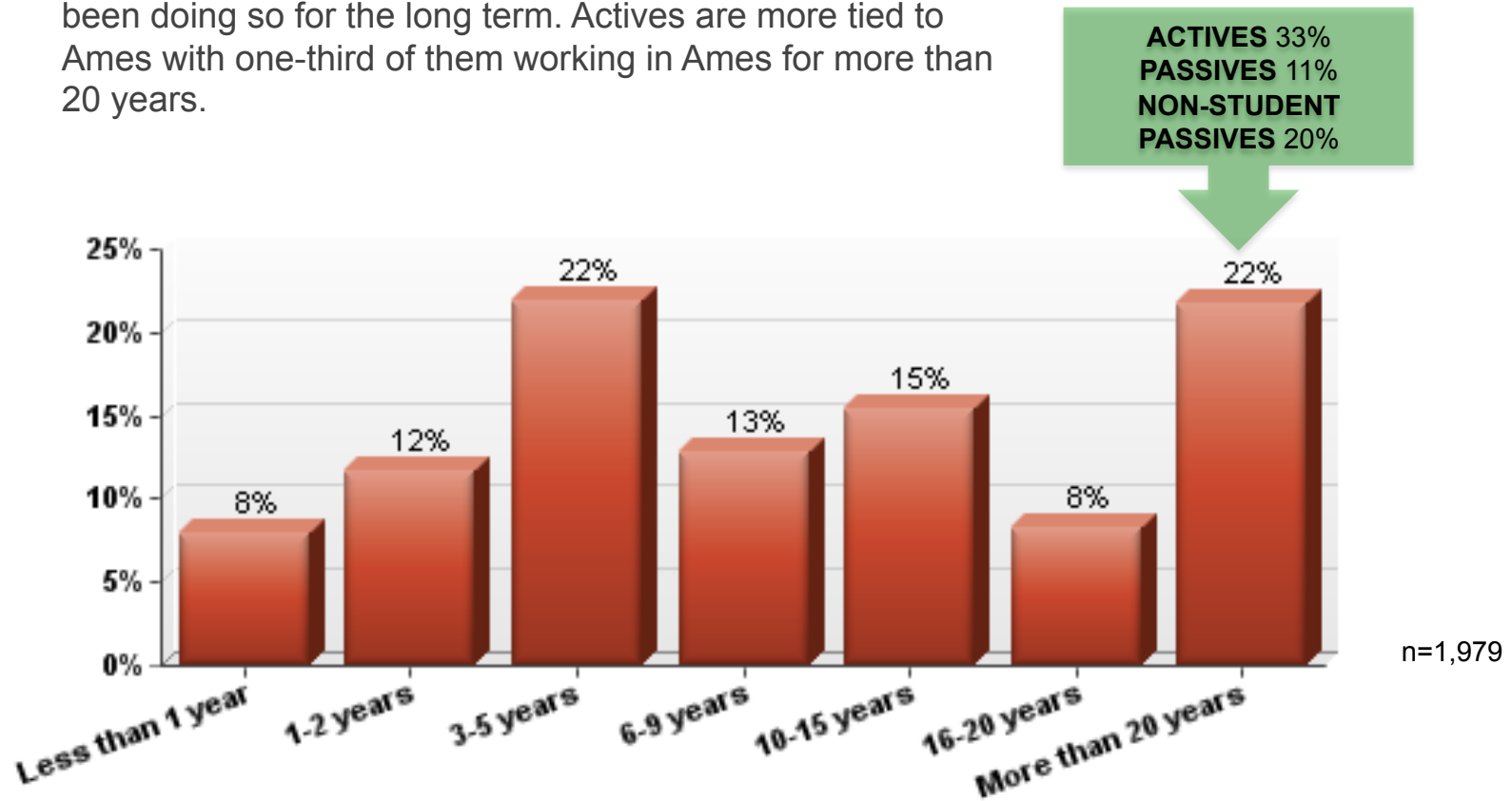


Q. You said you live in Ames. Do you rent or own your home?

Those Who Work in Ames

Duration of Employment in Ames

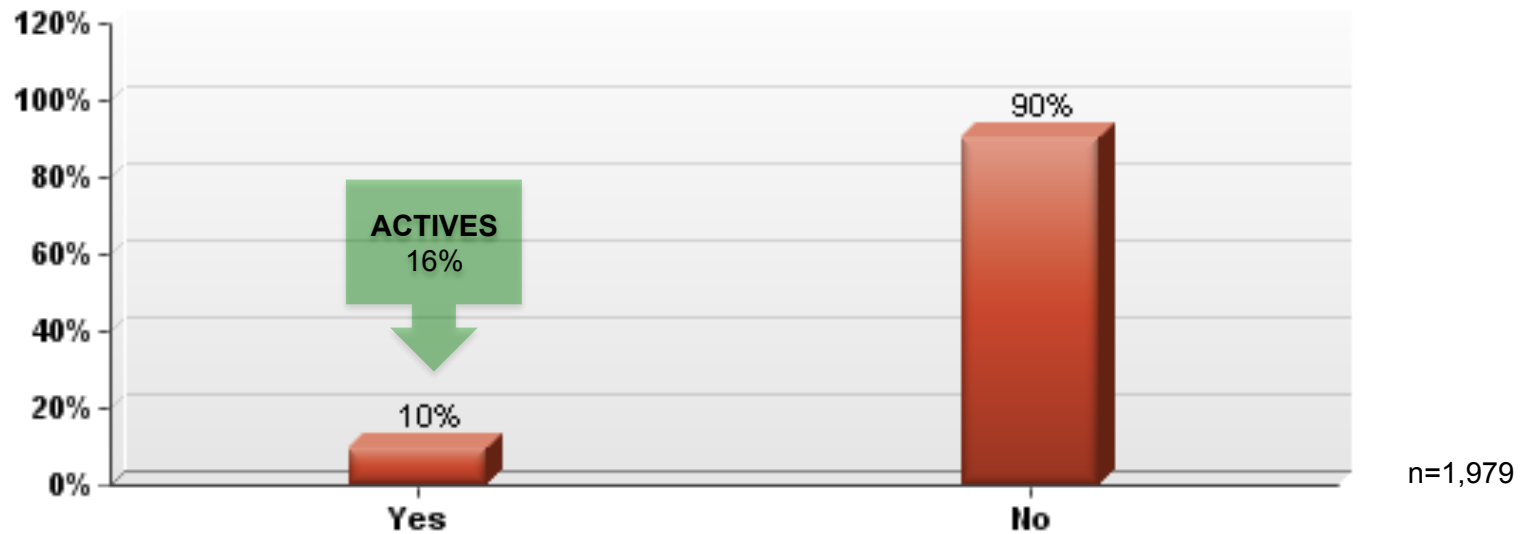
A large percentage of those who work in Ames have also been doing so for the long term. Actives are more tied to Ames with one-third of them working in Ames for more than 20 years.



Q. Approximately how long have you worked in Ames? (Select one from the drop down menu)

Business Owners

The study contained just under 200 business owners.



Q. You said you work in Ames. Are you a business owner?

The Connection to Iowa State University

Relationship to University

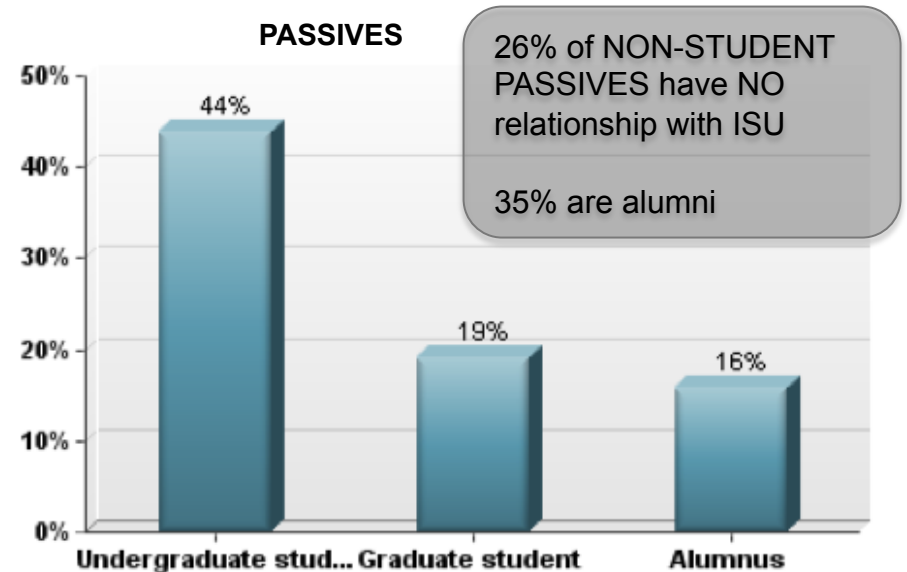
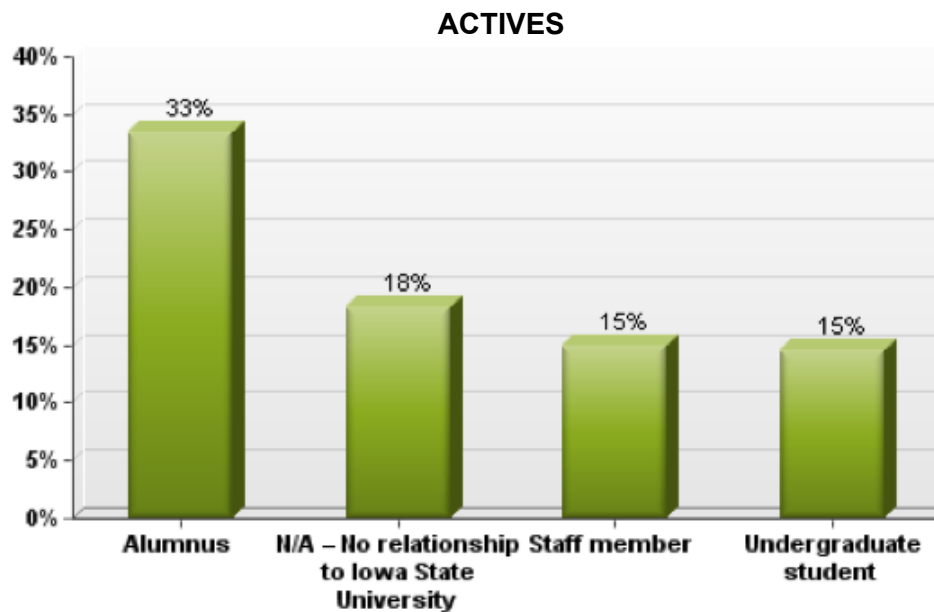
The University obviously has a huge impact on not only Ames, but on the city's immediate neighbors as well as those in other Iowa cities that contain large alumni populations. Approximately 4 out of 5 of all respondents had some connection to Iowa State University. And again, one-third of those responding from Ames were current students.

Answer	Outsiders (n=1,237)	Ames (n=3,463)	Neighbors (n=603)
Undergraduate student	18%	32%	10%
Alumnus	41%	23%	38%
Graduate student	2%	14%	4%
N/A – No relationship to Iowa State University	21%	14%	23%
Staff member	5%	13%	11%
Other (specify)	14%	10%	14%
Retired / former university faculty or staff	2%	5%	4%
Parent of an Iowa State University student	10%	4%	8%
Faculty member	0%	4%	1%
Considering an employment position at the university	2%	2%	2%
Prospect – considering attending Iowa State University in the future	1%	1%	2%

Q. What, if any, relationship do you have to Iowa State University? Are you a... (Select all that apply)

Relationship to University By City Participation

Actives are far more likely to have a past connection to Iowa State University, while Passives are more likely to have a current connection.

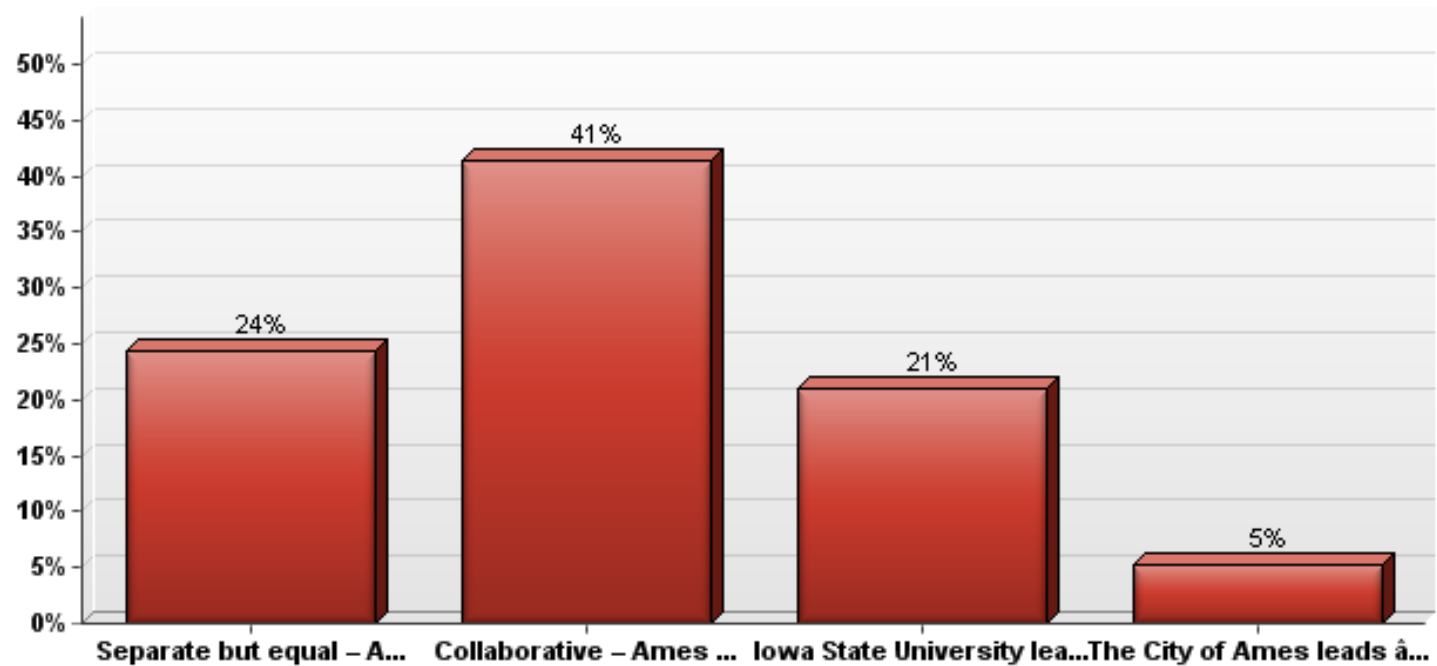


Q. What, if any, relationship do you have to Iowa State University? Are you a... (Select all that apply)

CURRENT Relationship Between City / ISU

While most see the relationship as collaborative, there is a virtually equal (slightly higher) percent of those who either view the relationship as separate or led by the university.

Actives and Passives are in agreement on this perception.



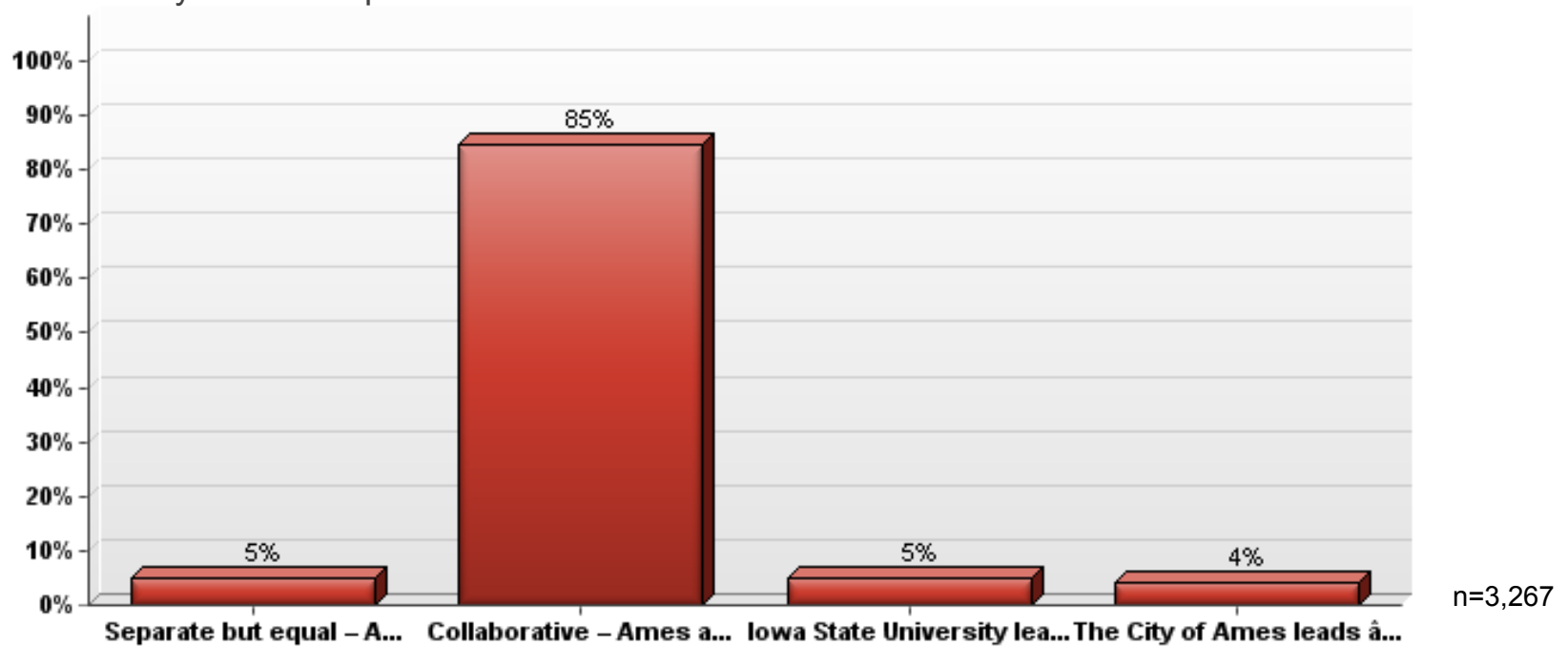
n=3,267

Q. And how do you see the CURRENT relationship between the City of Ames and Iowa State University? Is it...
(Select the one that describes how the relationship is today)

IDEAL Relationship Between City / ISU

Perceptions of the current city / university relationship are far from ideal. Expectations regarding the ideal relationship are almost unanimous – most feel the city / university should be more collaborative.

Again, Actives and Passives are in agreement on their expectations for the city / Iowa State University relationship.

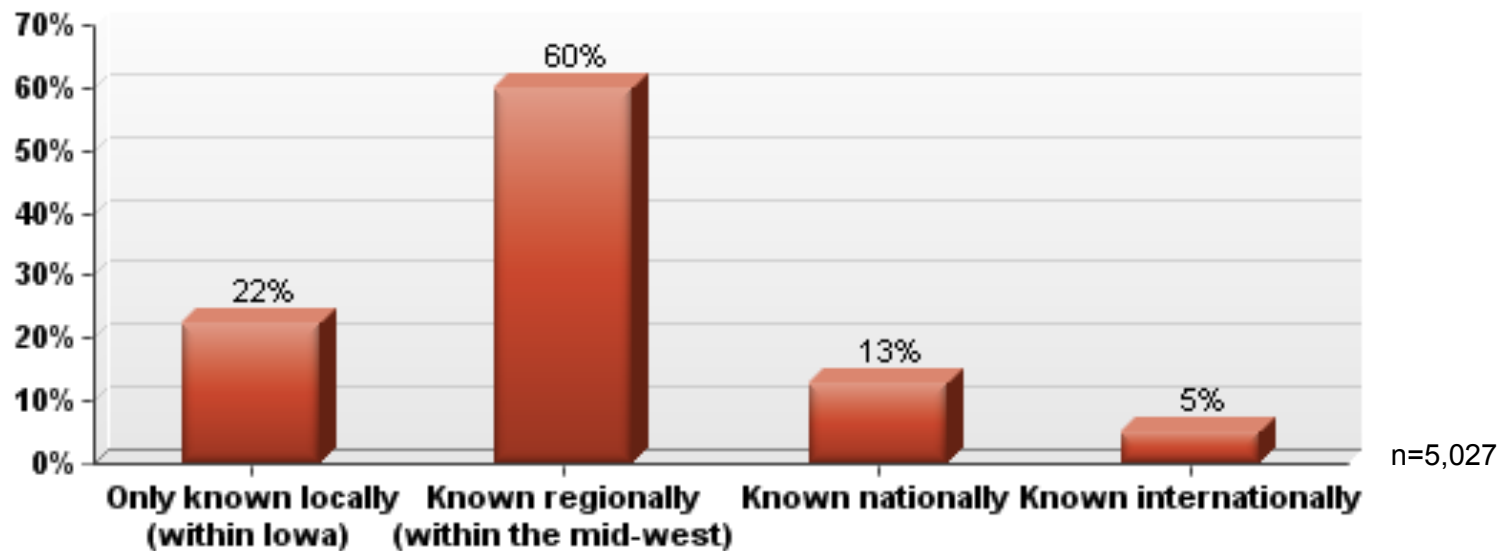


Q. What is your opinion about what the IDEAL relationship between the City of Ames and Iowa State University should be? Should the relationship be... (Select one)

Ames' Starting Point

Area of Influence

Ames is perceived as being known either locally or mostly within the mid-west region, but not outside of the mid-west. Actives and Passives agree on this as do Ames residents vs. neighbors and outsiders.

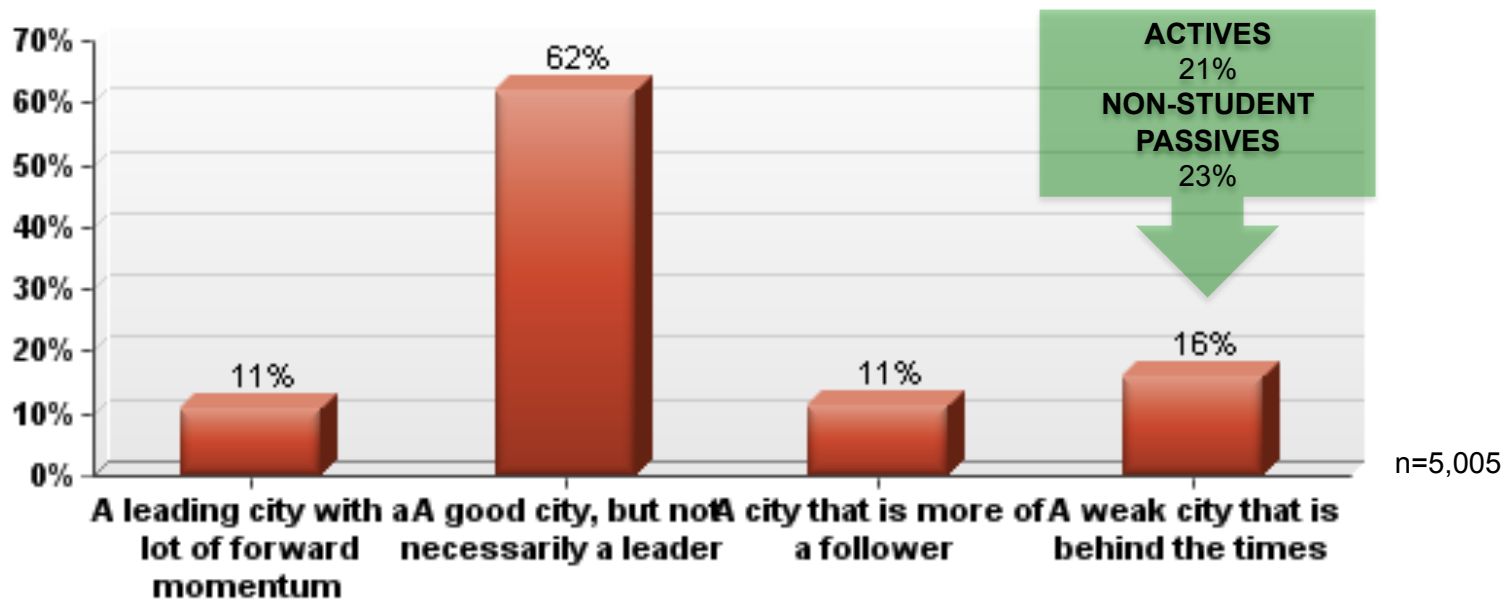


Q. How well KNOWN do you feel Ames is?

Brand Momentum

Ames sits at a solid starting point, being perceived as “good” but “not a leader.” There were no significant differences in opinions between Residents and Neighbors.

Actives and Non-Student Passives are tougher and have higher standards – they are more likely to consider Ames to be weak and behind the times.



Q. Which would you consider Ames to be? (Select one)

The Competitive Landscape

A word about competitive differentiation

Competitive differentiation is not absolute – it is not obtained by BEING something ONLY you can be. It is obtained by OWNING something credible that only YOU are claiming.

For example:

- Volvo is not necessarily the “safest” car brand, although they own the idea of safety. 2009’s safest 15 cars featured more vehicles from Acura, Honda and Subaru than Volvo. That said, Volvo vehicles are credibly safe.
- Las Vegas COULD credibly be the “city that never sleeps,” but that idea was first claimed, and now owned, by New York City.

So the City of Ames will achieve competitive differentiation by claiming something credible that none of your competitors have yet claimed, not necessarily by BEING something that nobody else can be.



Creating an opportunity for a fulfilling lifestyle

Interesting note: Ankeny presents its development as very strategic and intentional: "There's a lot involved in creating and nurturing a community that people are proud to call home. It doesn't happen overnight. But through careful planning, it has happened in Ankeny, Iowa."



WHAT we do

“Create and nurture a community that people are proud to call home... Offering numerous opportunities to achieve a fulfilling lifestyle in Central Iowa.”

WHY we do it

To offer “more than 44,000 Iowans the opportunity to have the life they want.”

Note: They refer to their brand in terms of their logo and what it represents - a coming together. This is not reinforced throughout their communications however, and what is “brought together” is not clear.



A great place to live, work and play



WHAT we do

“As Iowa's capital city, Des Moines is a hub of government action, business activity and cultural affairs... Though we have big city bustle, we're extremely proud of our small town atmosphere... Truly the best of both worlds!”

WHY we do it

To make Des Moines a “great place to live work and play.”

city of Iowa City, Iowa

Small town atmosphere, big city choices



WHAT we do

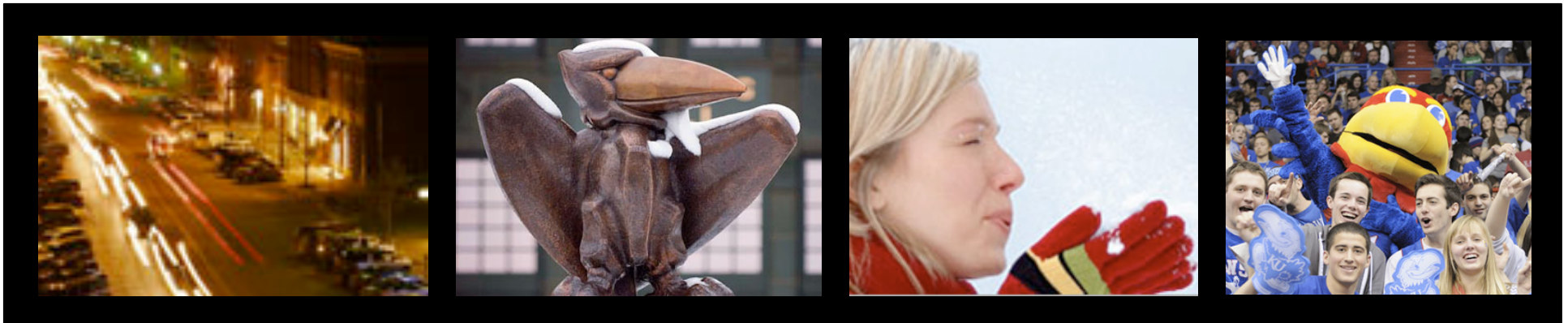
“Offer big-city amenities along with small-town hospitality... Iowa City has long served as a locus for culture, education, variety and fun.. this place is one where tradition comfortably exists alongside change.”

WHY we do it

N/A



Perfect combination of small-town and big city



WHAT we do

“Lawrence possesses all of the aspects of a friendly, active and culturally diverse community. With the perfect combination of small-town hospitality and big-city attractions, Lawrence lays claim to its share of national recognition and historical significance.”

WHY we do it

N/A



Opportunity that comes from a great university



WHAT we do

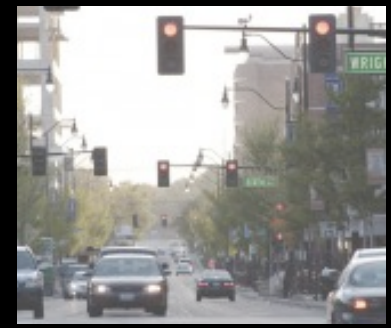
“From world-class educational institutions and outstanding businesses to vibrant recreation and leisure resources, West Lafayette offers a wealth of opportunity in this award-winning city.”

WHY we do it

To provide opportunity



“The best of urban life in a friendly, smaller city.”



WHAT we do

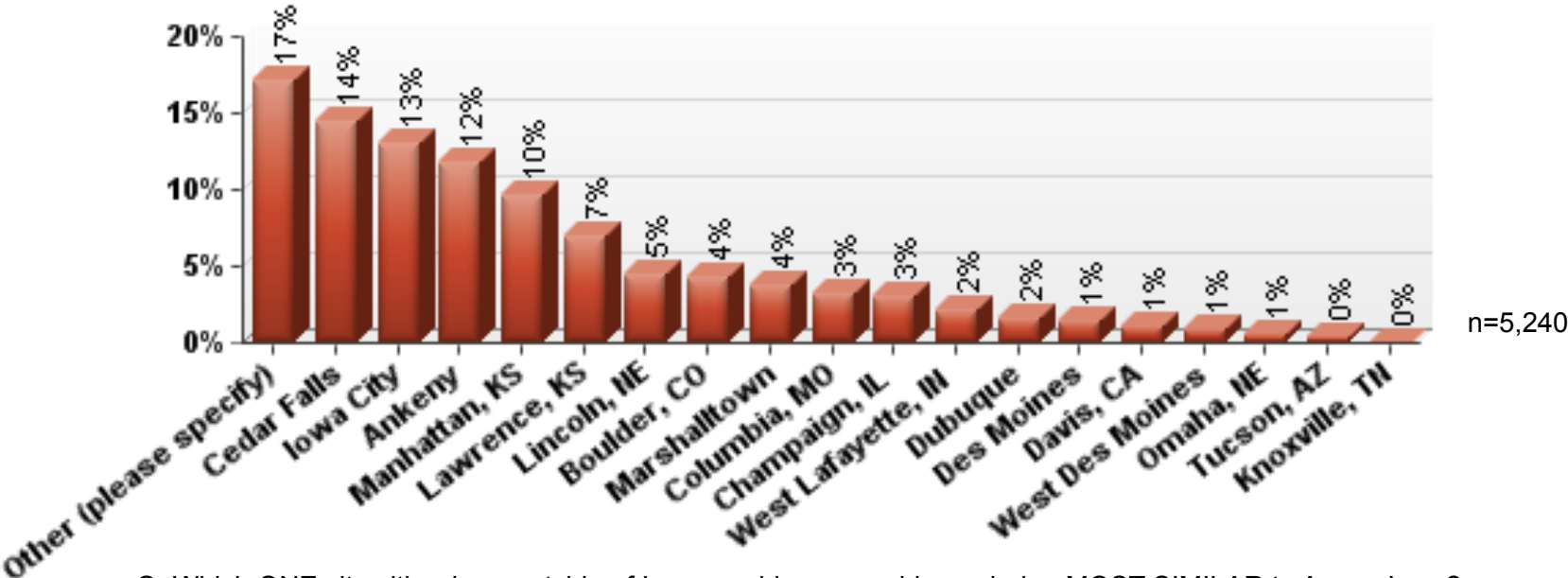
“We provide a world class university and a vibrant downtown that together offers arts, culture and diversity like few other cities our size.”

WHY we do it

N/A

Ames Is Most Similar To...

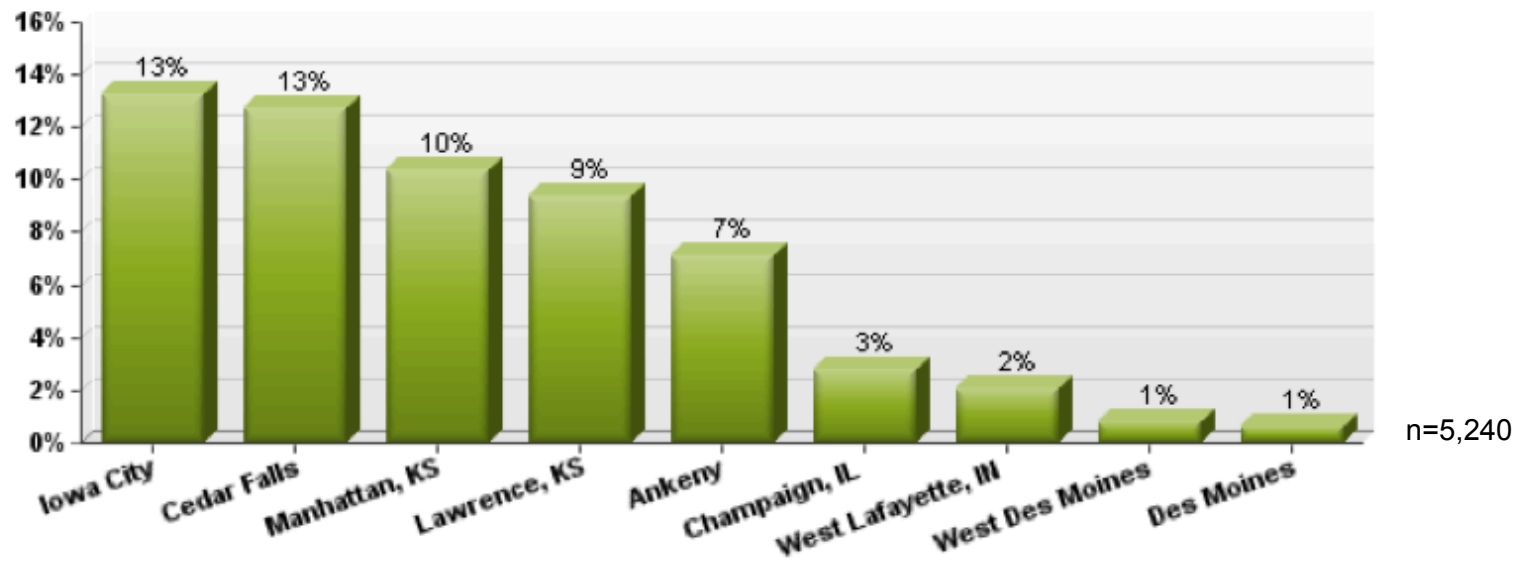
A number of those selecting “other” responded that they did not know or were unsure of what city Ames would be most similar to. The top-5 cities considered most similar to Ames are clearly shown on the chart below.



Q. Which ONE city either in or outside of Iowa would you consider as being MOST SIMILAR to Ames, Iowa?
And WHY? (Select one)

Ames Is Most Similar To... Actives

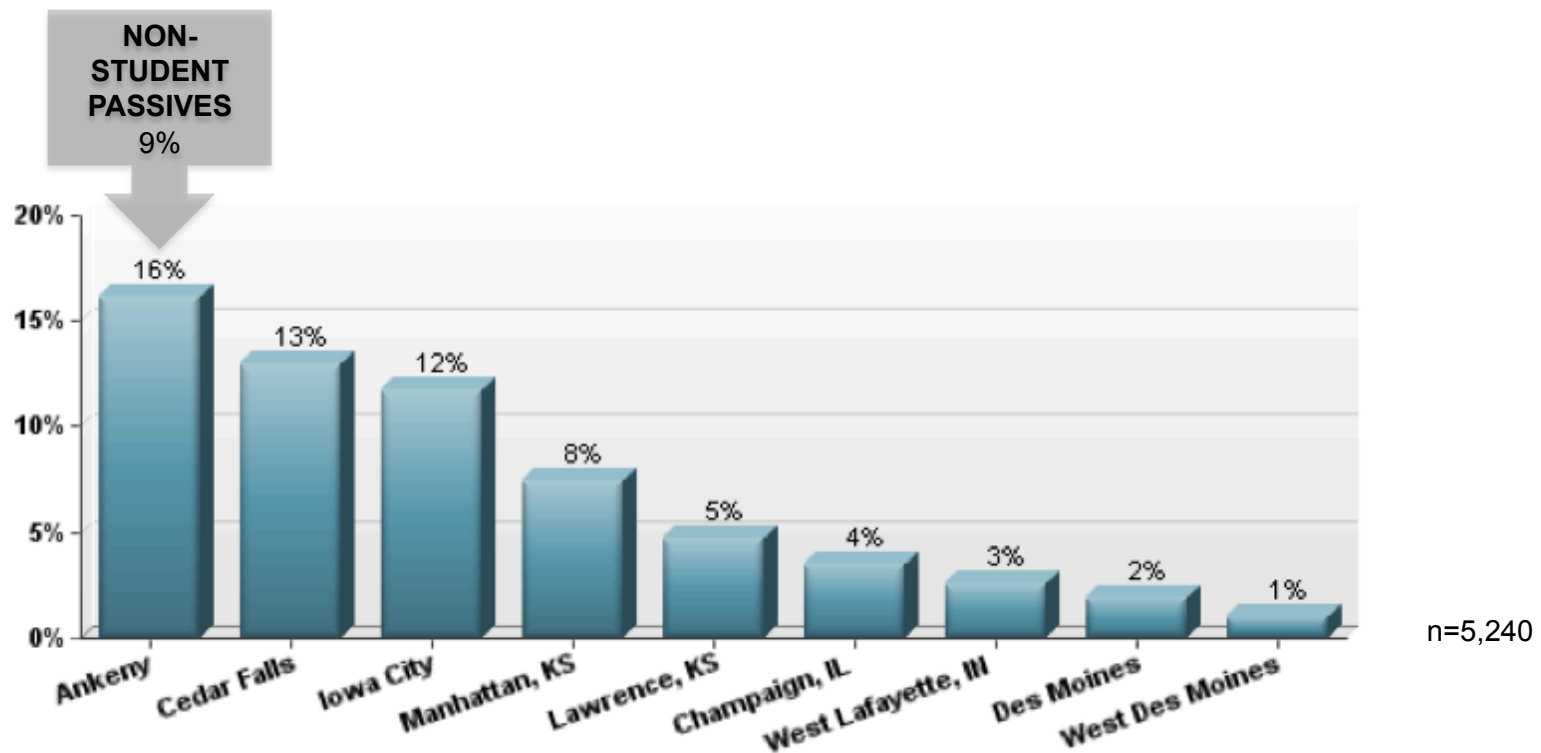
Actives are most likely to compare Ames to other college towns in Iowa. They are significantly less likely than the total respondents to compare Ames to neighbor Ankeny.



Q. Which ONE city either in or outside of Iowa would you consider as being MOST SIMILAR to Ames, Iowa?
And WHY? (Select one)

Ames Is Most Similar To... Passives

Passives have a more local perspective, comparing Ames most to neighbor Ankeny. However, when students are removed from the Passive group, perceptions more closely mirror the Active residents.

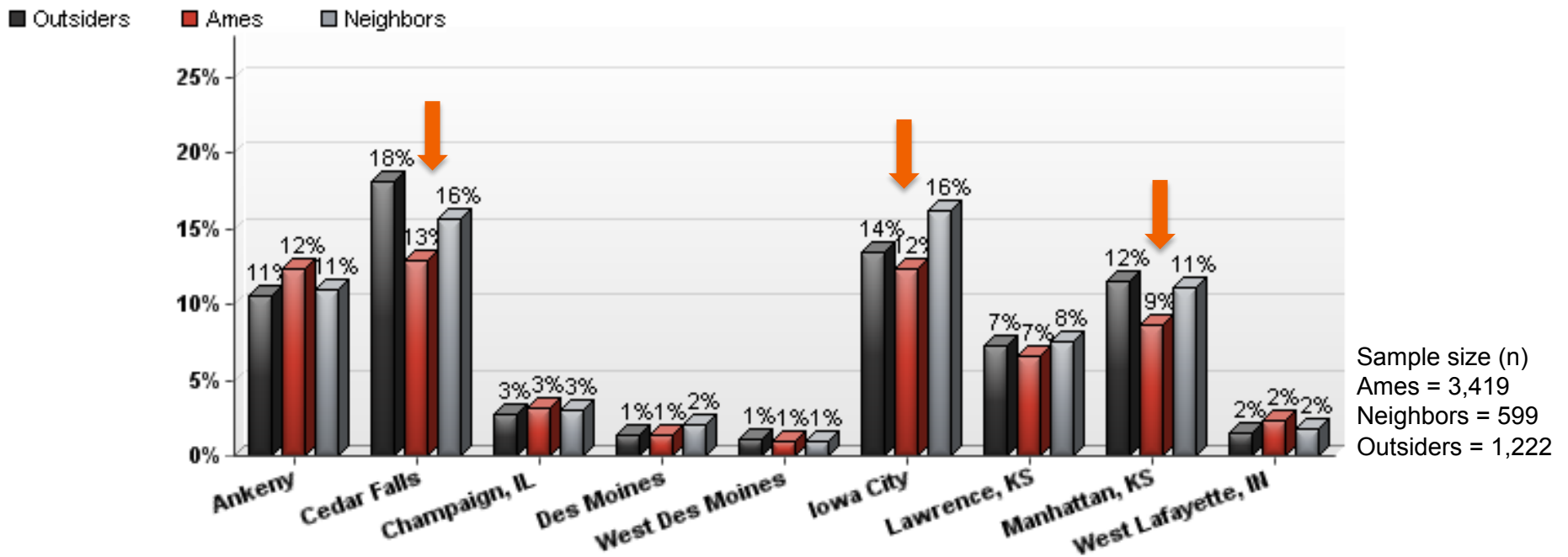


Q. Which ONE city either in or outside of Iowa would you consider as being MOST SIMILAR to Ames, Iowa?
And WHY? (Select one)

Ames Is Most Similar To...

By City of Residence

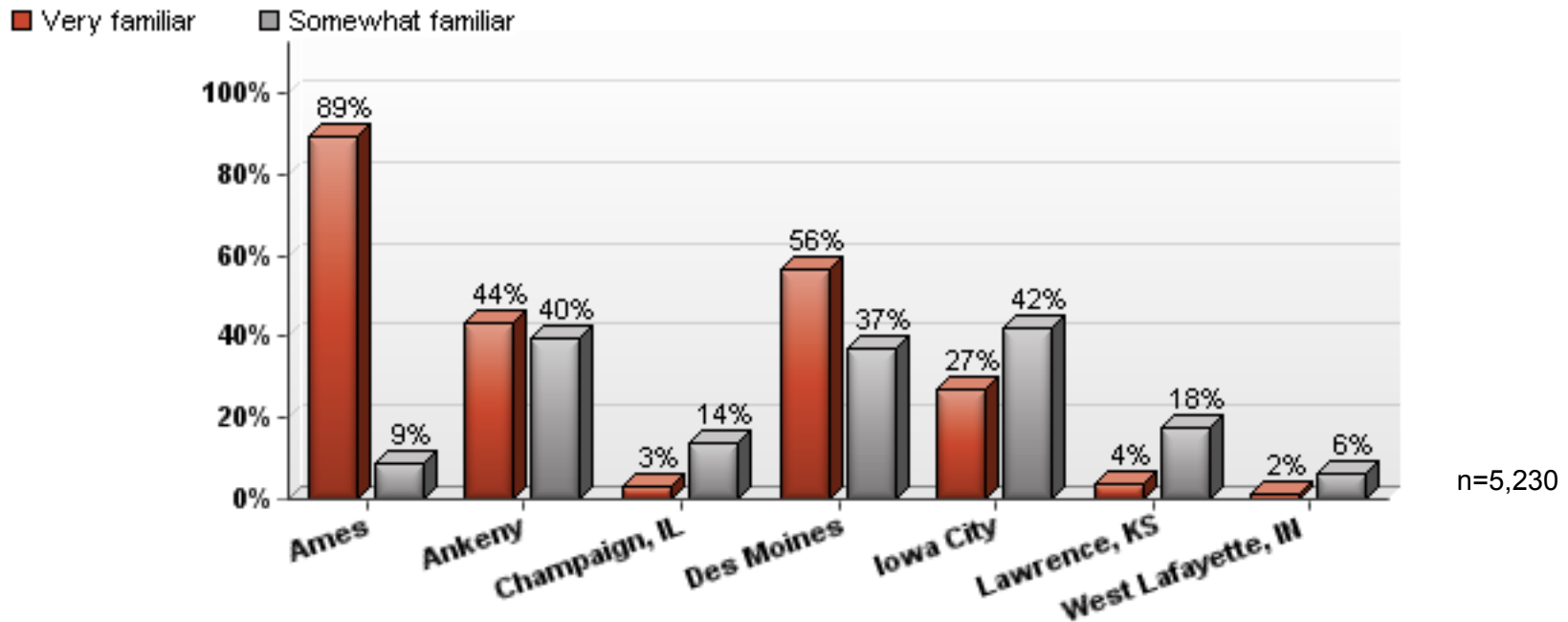
This chart includes both the cities considered to be the top-5 most similar according to respondents as well as all the cities included in the competitive audit. Ames residents are a little less likely to compare Ames to Cedar Falls, Iowa City or Manhattan, KS. So while Ames residents are less likely to think the city is like every other Iowa college town, outsiders are saying Ames is indeed most similar to other college towns.



Q. Which ONE city either in or outside of Iowa would you consider as being MOST SIMILAR to Ames, Iowa?
 And WHY? (Select one)

Competitive Set Familiarity

Outside of Ames, respondents had the greatest level of familiarity with Des Moines, Ankeny and Iowa City. This level of familiarity impacted the competitive perceptions shown on the following slides.



Q. How familiar are you with each of the following cities in or outside of Iowa? (Select one for each)

City Associations

Trait	Ames	Ankeny	Champaign, IL	Des Moines	Iowa City	Lawrence, KS	West Lafayette, IN	N/A - None or don't know
Sophisticated	11%	7%	4%	21%	13%	4%	1%	38%
Innovation center	28%	4%	4%	13%	10%	2%	2%	38%
Progressive / forward thinking	17%	18%	2%	11%	22%	4%	1%	24%
Educational / intellectual	58%	1%	6%	2%	18%	2%	2%	10%
Retail / shopping options	2%	16%	1%	64%	6%	1%	0%	9%
Business hub	2%	6%	2%	72%	2%	1%	0%	15%
Provides opportunities	18%	8%	2%	41%	5%	2%	1%	23%
Stagnant / not changing or growing	32%	3%	2%	5%	4%	2%	2%	49%
Vibrant / energetic	13%	10%	2%	21%	26%	6%	0%	21%
Small town with big city amenities	37%	21%	2%	5%	11%	5%	1%	18%

57

Q. Which ONE city would you most associate with each of the following? (Select one for each)

n=5,088

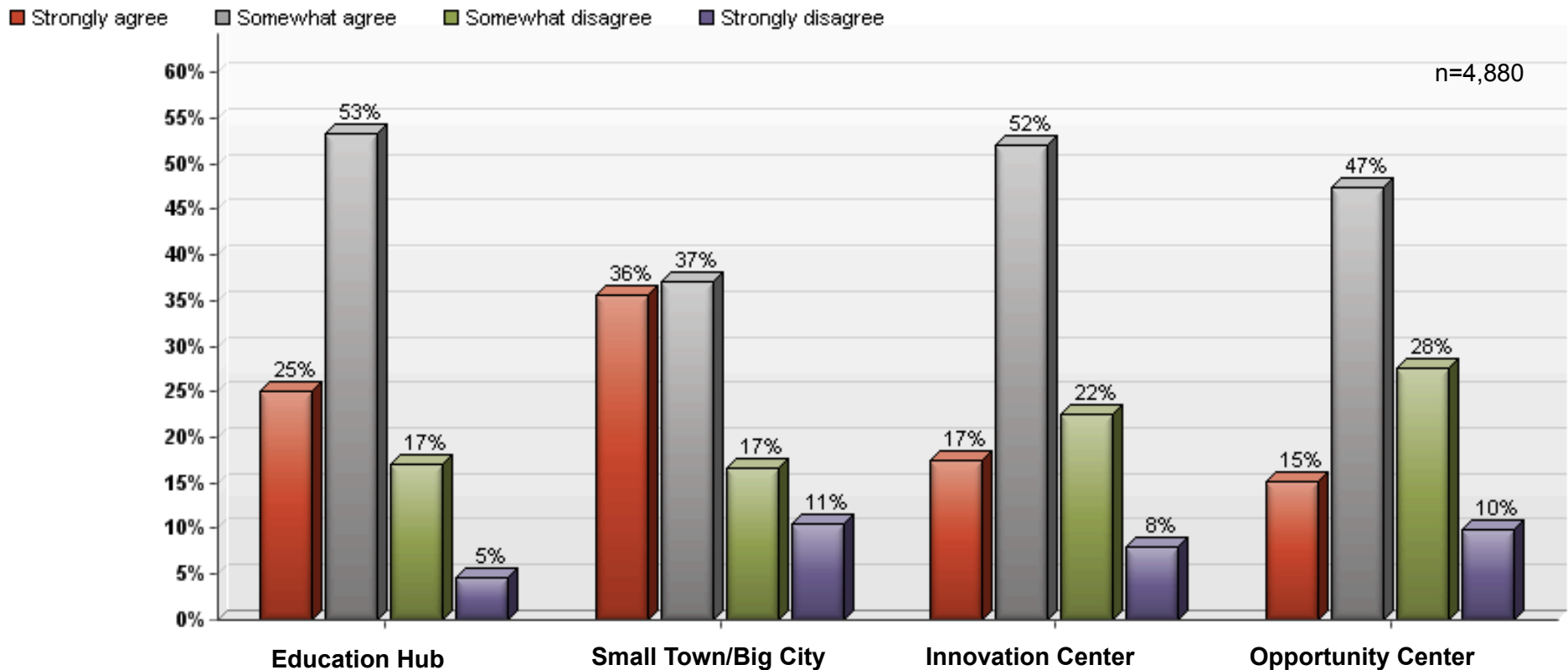
Exploring Vision Concepts

Vision Concepts Tested

- **Ames is Iowa's educational hub.** Through our unwavering commitment to education we develop global citizens who actively contribute to our community and to the world at large.
- **Ames is the innovation center of Iowa.** We are committed to creating an environment that supports innovation, making us a home for advancements that help people thrive.
- **Ames is the opportunity center of Iowa.** With a distinguished university at the heart of our town, Ames provides our citizens with world-class access and exposure that is unsurpassed in the state of Iowa.
- **Ames is a small town with big city opportunities.** Located in the heart of the Midwest, Ames combines small-town tradition with the big city discovery and diversity that springs from a major university.

Accuracy

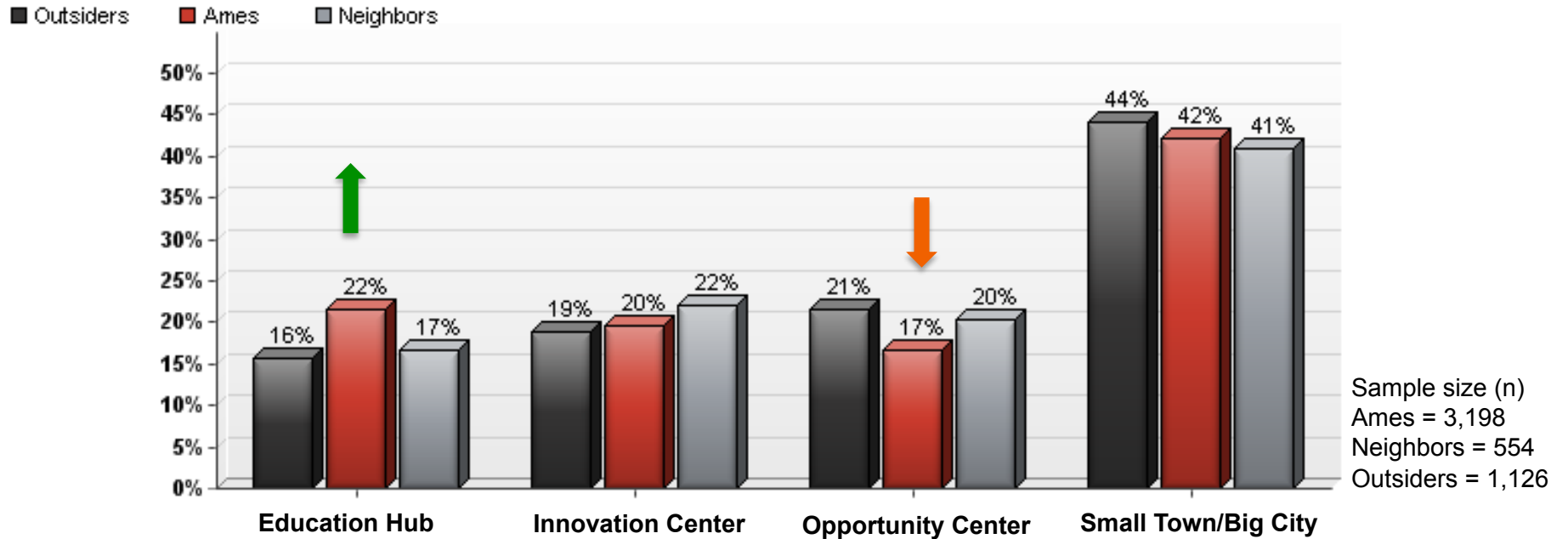
Small Town / Big City followed by Education Hub are considered the most accurate of the vision concepts tested.



Q. And, how much do you AGREE or DISAGREE that each statement is an accurate description of Ames?
(Select one for each)

Preference By City of Residence

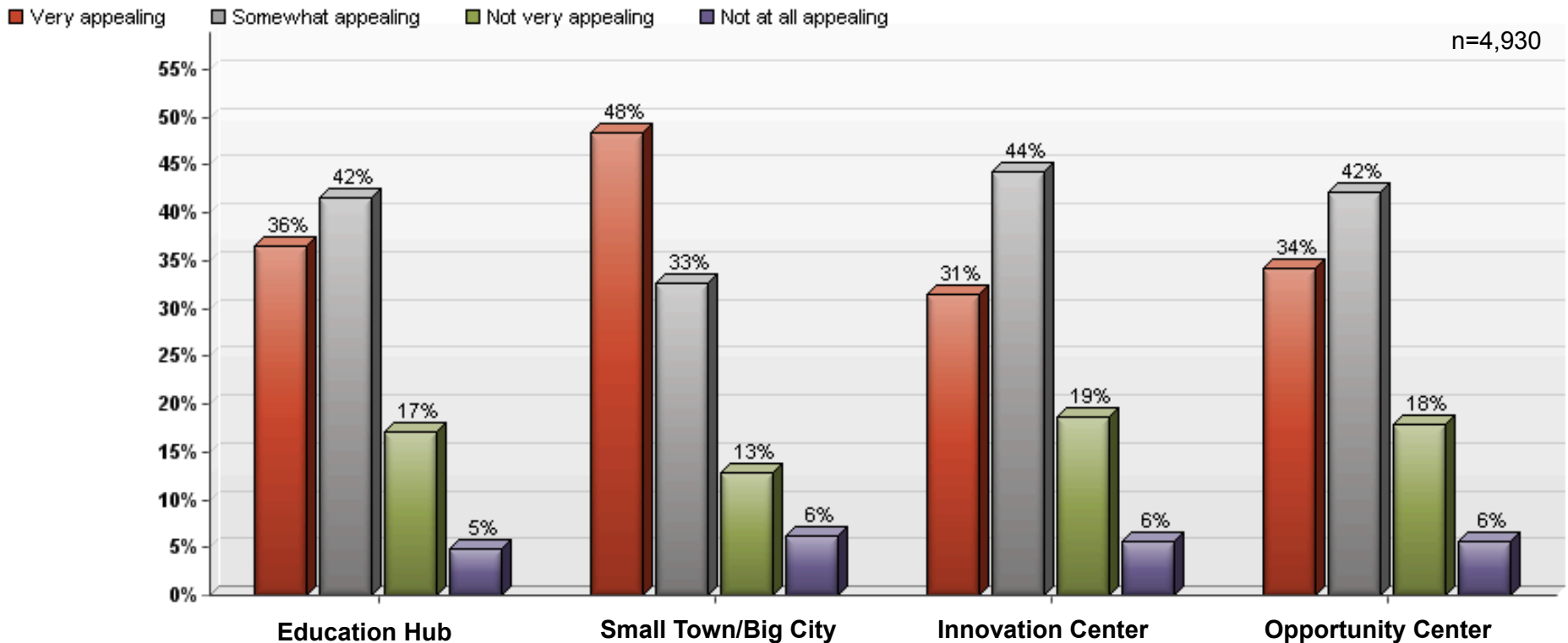
The residents of Ames feel the vision is more education than opportunity driven in comparison to neighbors or outsiders.



Q. Finally, which ONE statement would you personally be proudest to see represent the City of Ames? (Select one) 61

Appeal

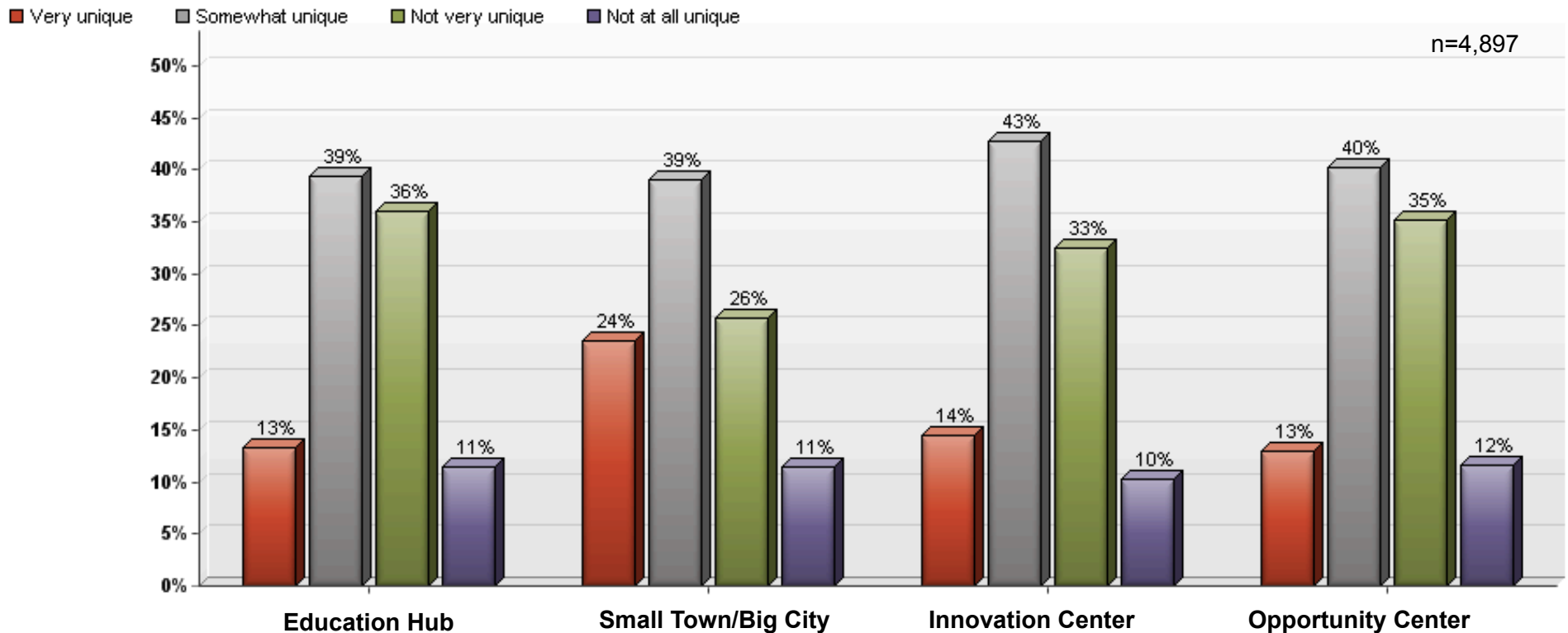
A top-box (“very” appealing) score of 30% or higher is considered to be the benchmark of success. All vision concepts score high in appeal. Respondents find Small Town/Big City most appealing. The remaining three ideas all score similar to one another.



Q. How APPEALING are each of the following descriptions of Ames to you? (Select one for each)

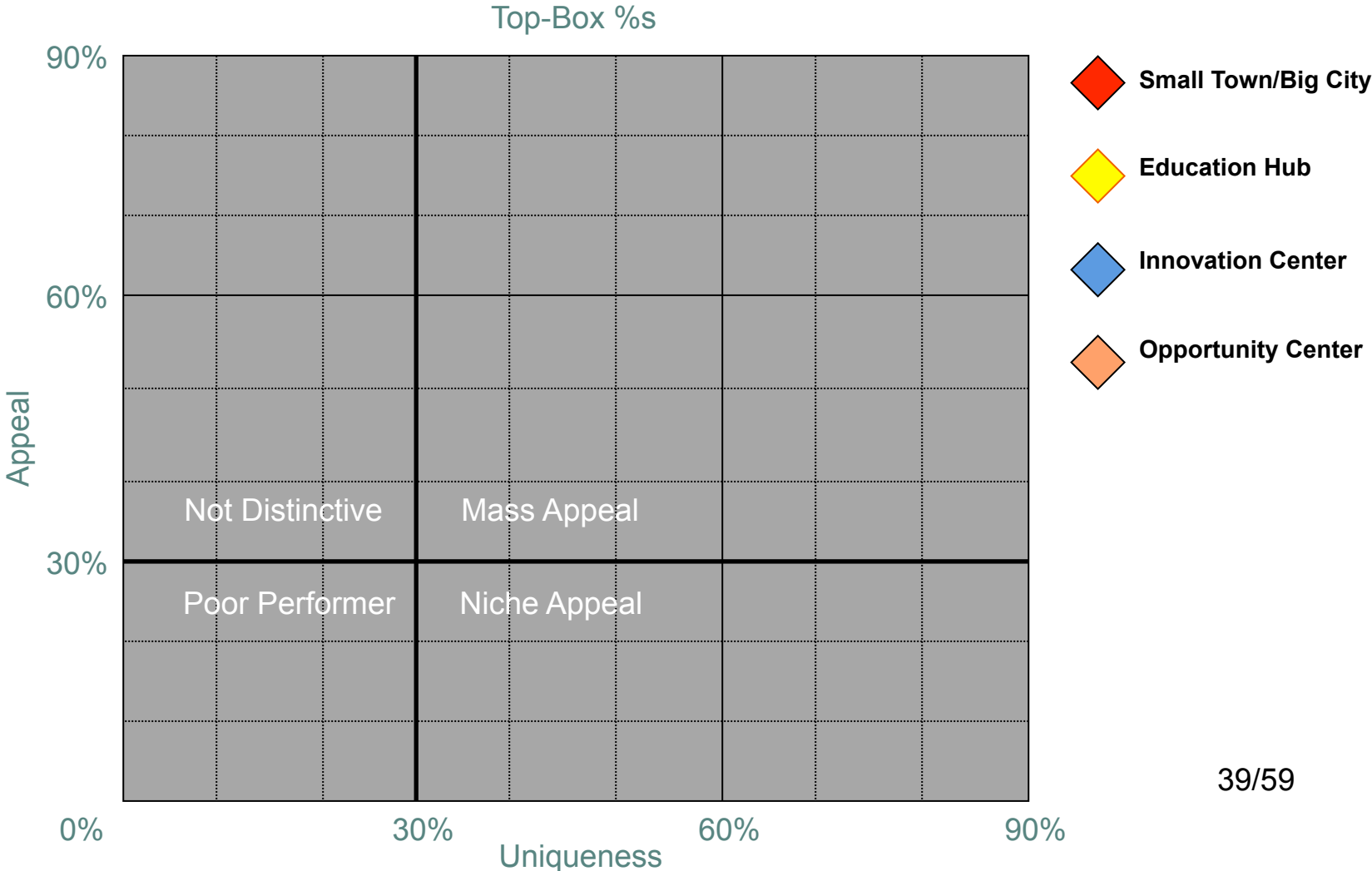
Uniqueness

Again, a top-box score of 30% or higher is used as the benchmark of success for uniqueness. Uniqueness under this level risks lacking distinction. While Small Town / Big City is considered the most unique, none of the ideas deliver as high as we might like on uniqueness.

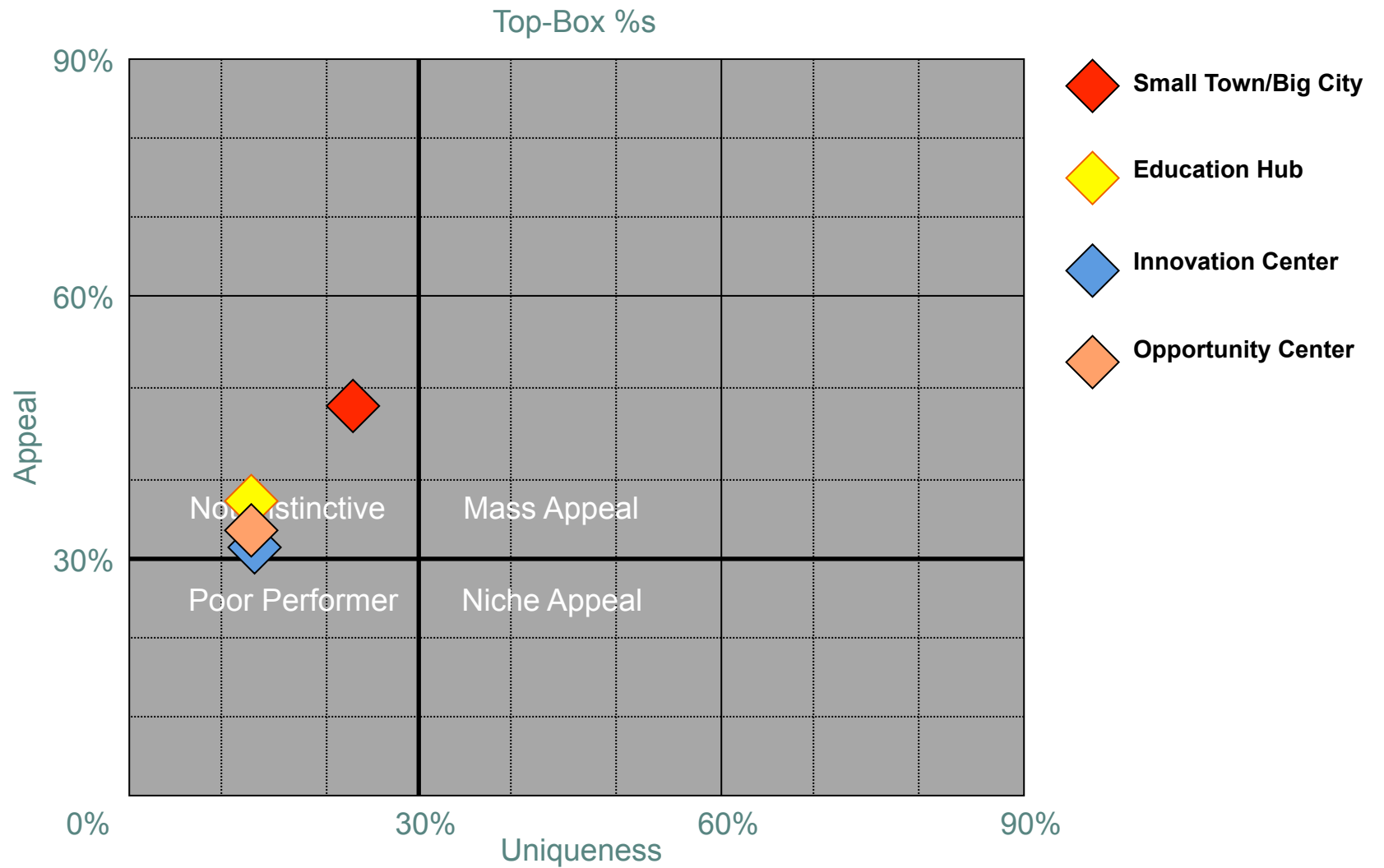


Q. Compared to other college towns, how UNIQUE would you consider each of the same descriptions of Ames to be?₆₃
(Select one for each)

Vision Mapping



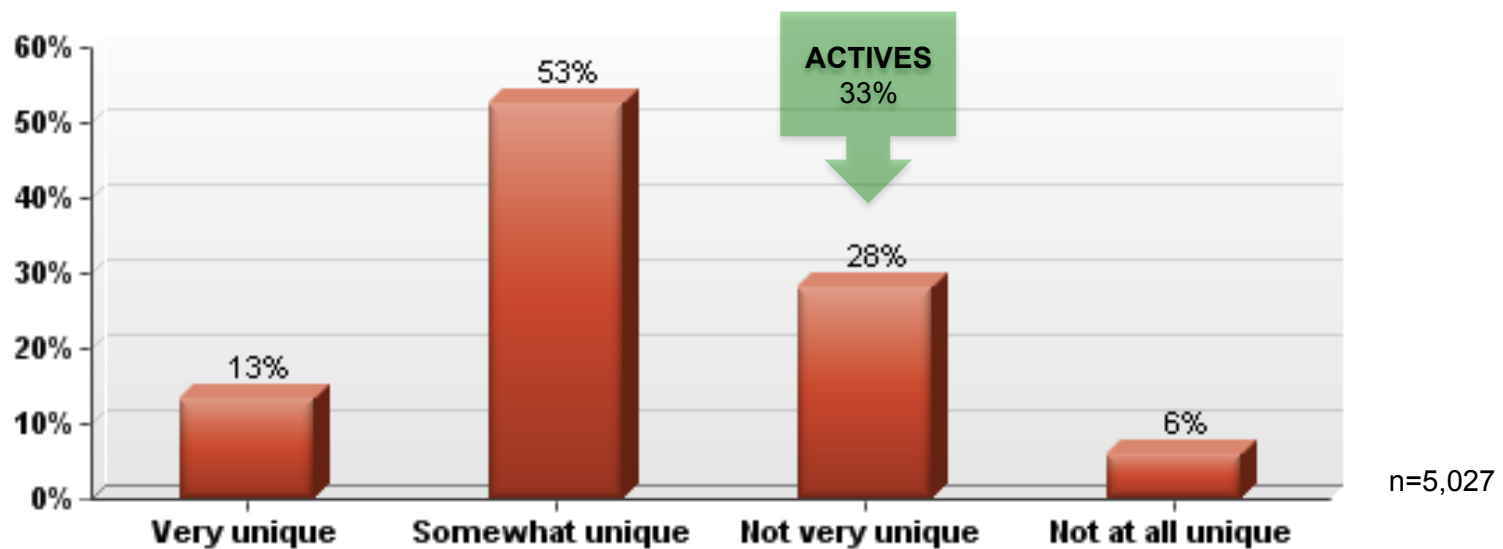
Vision Mapping



What Makes Ames Unique?

Uniqueness

The majority of respondents consider Ames to be just somewhat or not very unique. There were no significant differences in opinions between Residents and Neighbors.



Q. Compared to other college towns in the Midwest, how UNIQUE would you consider Ames to be?

Most Unique Thing About Ames Is...

Answer	%
Small-town feel	25%
Agricultural significance	13%
Leadership in animal health	9%
Attractive – clean, well maintained	7%
Other (specify)	6%
Safety	5%
Convenient location – Interstate access and proximity	5%
Recreational services – parks, trails and open spaces	4%
Good schools	4%
Locally owned and operated shops and restaurants	3%
Ethnically diverse	3%
Technical innovation	3%
Opportunities offered	3%
Medical care and facilities	2%
Family / kid-friendly activities	2%
Culturally vibrant	2%
Intellectual leadership	2%
Community events and sports	2%

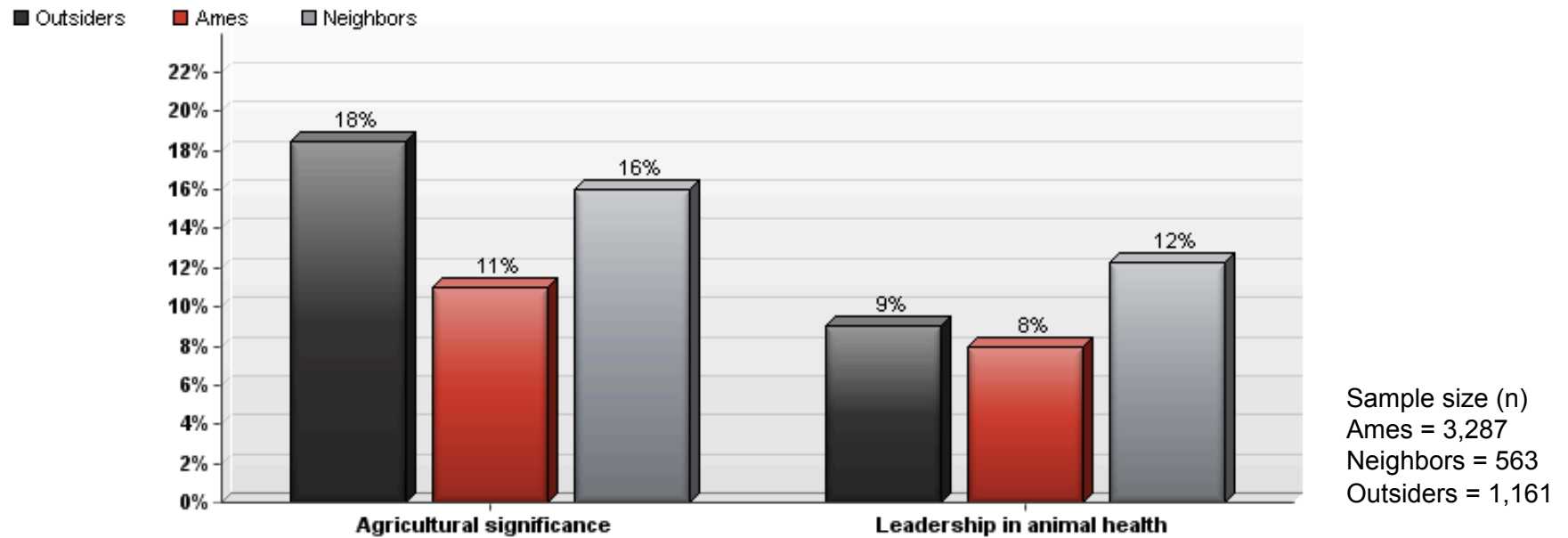
} Agriculture &
Animal Health
Combined 24%

n=5,011

Q. Fill in the blank in this sentence – “Compared to other college towns in the Midwest, the most UNIQUE thing about Ames is _____.” (Select one)

Most Unique Thing About Ames By City of Residence

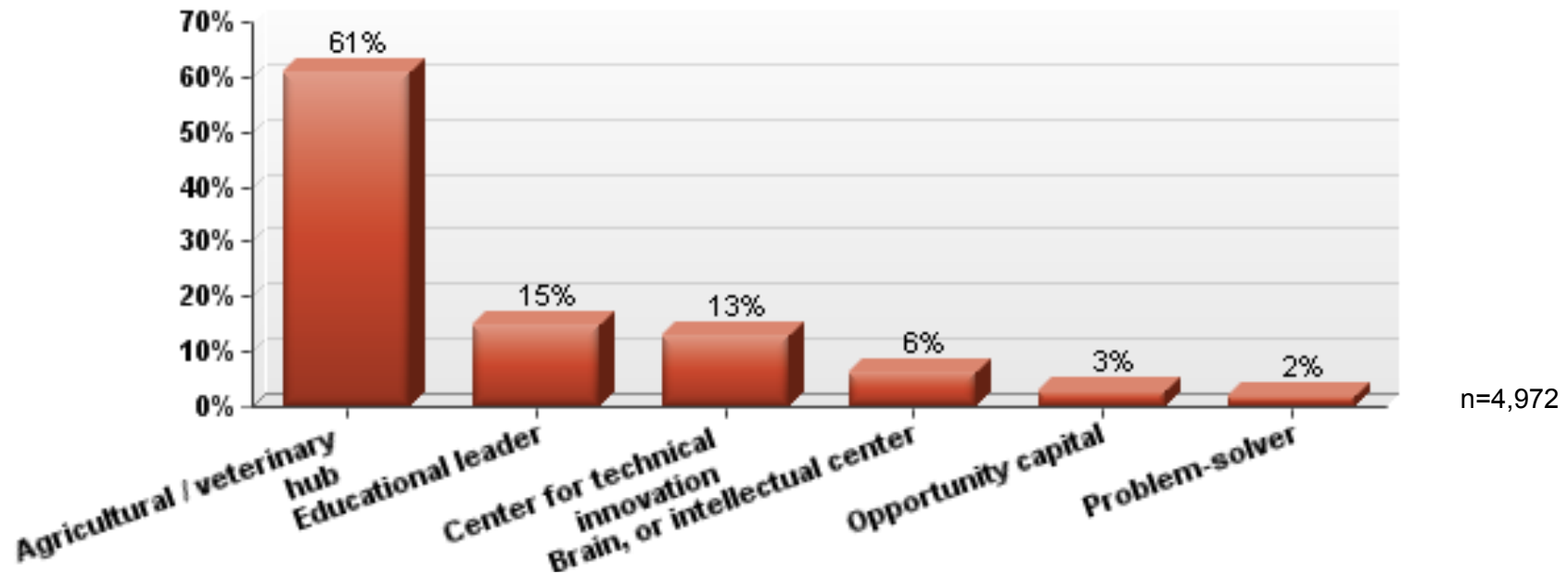
Neighbors and Outsiders view the connections to agriculture and animal health as being more unique than Ames residents do.



Q. Fill in the blank in this sentence – “Compared to other college towns in the Midwest, the most UNIQUE thing about Ames is _____.” (Select one)

Ames is the _____ of Iowa

Again, the agriculture / veterinary connection surfaces as a point of distinction for Ames.

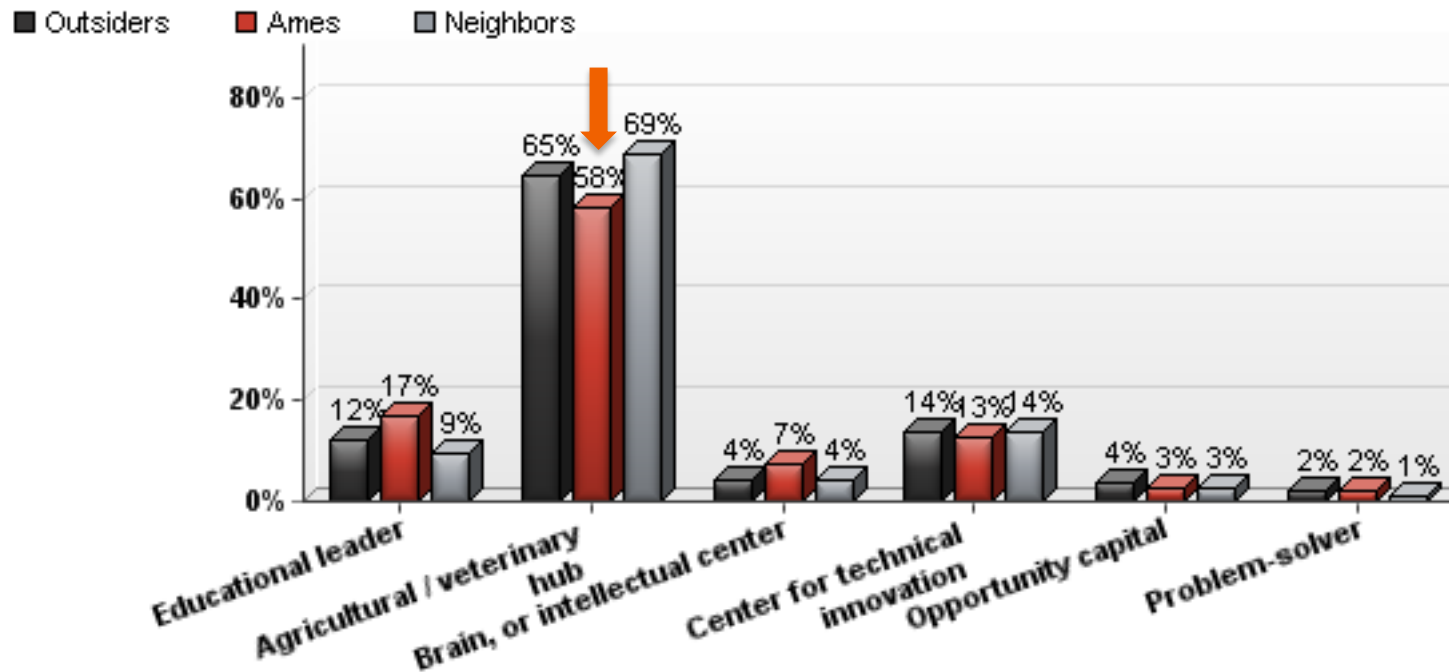


Q. Fill in the blank in this sentence – “Ames is the _____ of Iowa.” (Select the ONE that fits best)

Ames is the _____ of Iowa

By City of Residence

Even stronger among those living outside of Ames.



Sample size (n)
 Ames = 3,283
 Neighbors = 562
 Outsiders = 1,160

Q. Fill in the blank in this sentence – “Ames is the _____ of Iowa.” (Select the ONE that fits best)

Ames is the _____ of Iowa

(In Your Own Words)

In general, respondents find it difficult to get away from geographic location when describing Ames' significance in the mid-west, though many expressed this centrality in emotional terms through a "heart" metaphor.

- *"heart"*
- *"geographical middle"*
- *"center of Iowa...not a progressive leader"*
- *"in the center of Iowa and the home of Iowa State University"*
- *"College Town in the middle of the state"*
- *"best small city located in the center"*
- *"geographic center but not the cultural and entertainment center"*
- *"Middle"*
- *"Ames is the heartbeat of Iowa."*
- *"Intelligent heart"*

Ames is the _____ of Iowa

(In Your Own Words)

However, those who could articulate something more than the “center” focused on Ames’ leadership in innovation through education.

- *“innovative center of Iowa as it leads the way in green technology as a result of its excellent university”*
- *“center of innovation”*
- *“Also an educational leader.”*
- *“Center of US Agricultural Innovation”*
- *“animal disease control center of Iowa and the nation”*
- *“Area of most potential”*
- *“city of ISU, leader of making engineers, veterinarians and Agricultural opportunities”*
- *“Agricultural Innovative Center”*
- *“agriculture brains”*
- *“center of discovery for Iowa”*
- *“research leader”*
- *“Ames is the science and technology problem-solver of Iowa.”*
- *“agricultural, biotechnology and energy research leader of Iowa”*

Ames Personality By City of Residence

Answer	Outsiders	Ames	Neighbors
Safe	60%	73%	60%
Friendly	63%	69%	59%
Comfortable	57%	65%	51%
Middle-class	49%	49%	46%
Intellectual	44%	48%	41%
Welcoming / inclusive to all	44%	45%	36%
Professional	35%	37%	33%
Having traditional values	42%	36%	34%
Real / down to Earth	39%	35%	31%
Proud	35%	29%	26%
Stagnant / complacent	19%	28%	32%
Careful / cautious	17%	28%	27%
Divided	16%	27%	27%
Fun	31%	27%	25%
Open-minded	24%	26%	18%
Conservative	23%	22%	24%
Liberal	14%	22%	20%
Boring	12%	21%	17%
Innovative	24%	21%	21%
Progressive	21%	20%	14%
Tired / run down / dated	16%	19%	22%

Q. Which adjectives would you use to describe Ames? (Select all that apply)

Ames Personality By City Participation

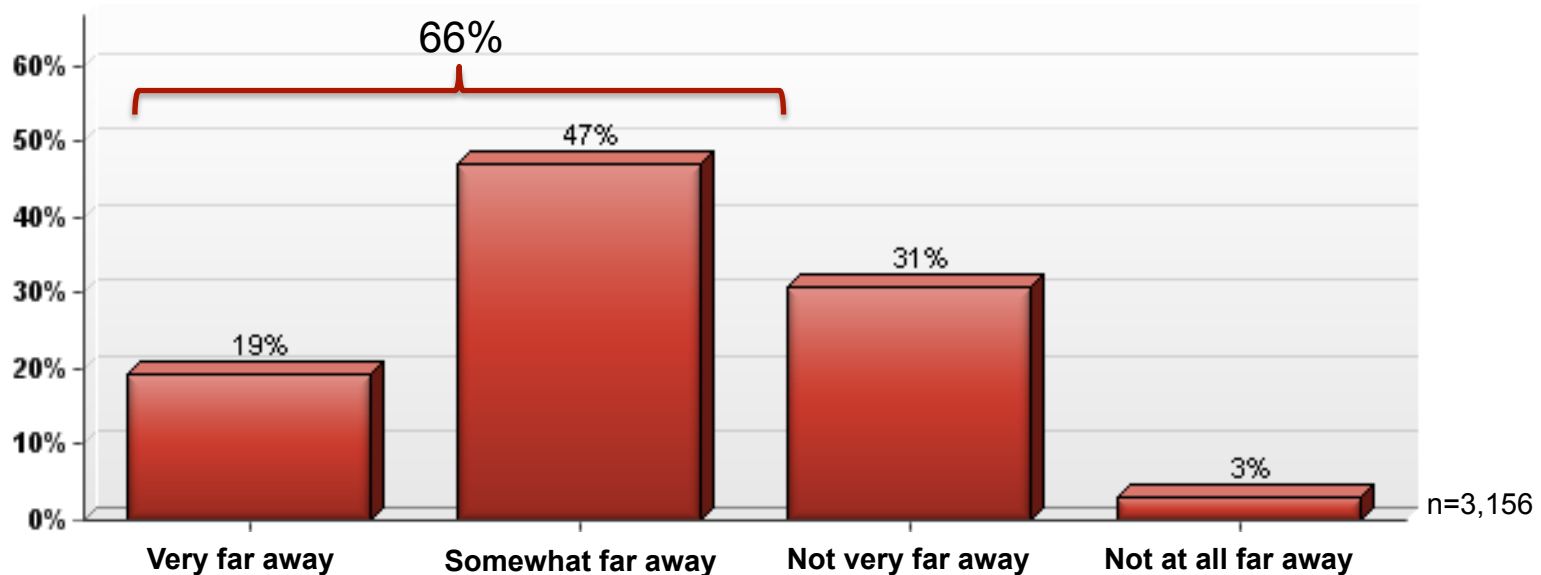
Answer	Actives	Passive	NON-STUDENT Passives
Safe	72%	74%	71%
Friendly	67%	70%	70%
Comfortable	66%	64%	63%
Middle-class	49%	48%	47%
Intellectual	51%	46%	47%
Welcoming / inclusive to all	38%	50%	41%
Professional	41%	34%	39%
Having traditional values	36%	36%	38%
Real / down to Earth	32%	37%	29%
Proud	27%	30%	24%
Stagnant / complacent	38%	21%	37%
Careful / cautious	38%	20%	31%
Divided	42%	16%	25%
Fun	22%	30%	22%
Open-minded	25%	27%	19%
Conservative	23%	21%	24%
Liberal	27%	18%	22%
Boring	20%	22%	21%
Innovative	20%	21%	15%
Progressive	20%	20%	15%
Tired / run down / dated	25%	16%	23%

Q. Which adjectives would you use to describe Ames? (Select all that apply)

The Appetite for Change

How Big of a Change Does Ames Need to Make? Ames Residents Only

Two-thirds of Ames residents say Ames is very or somewhat far away from what they envision for the future.

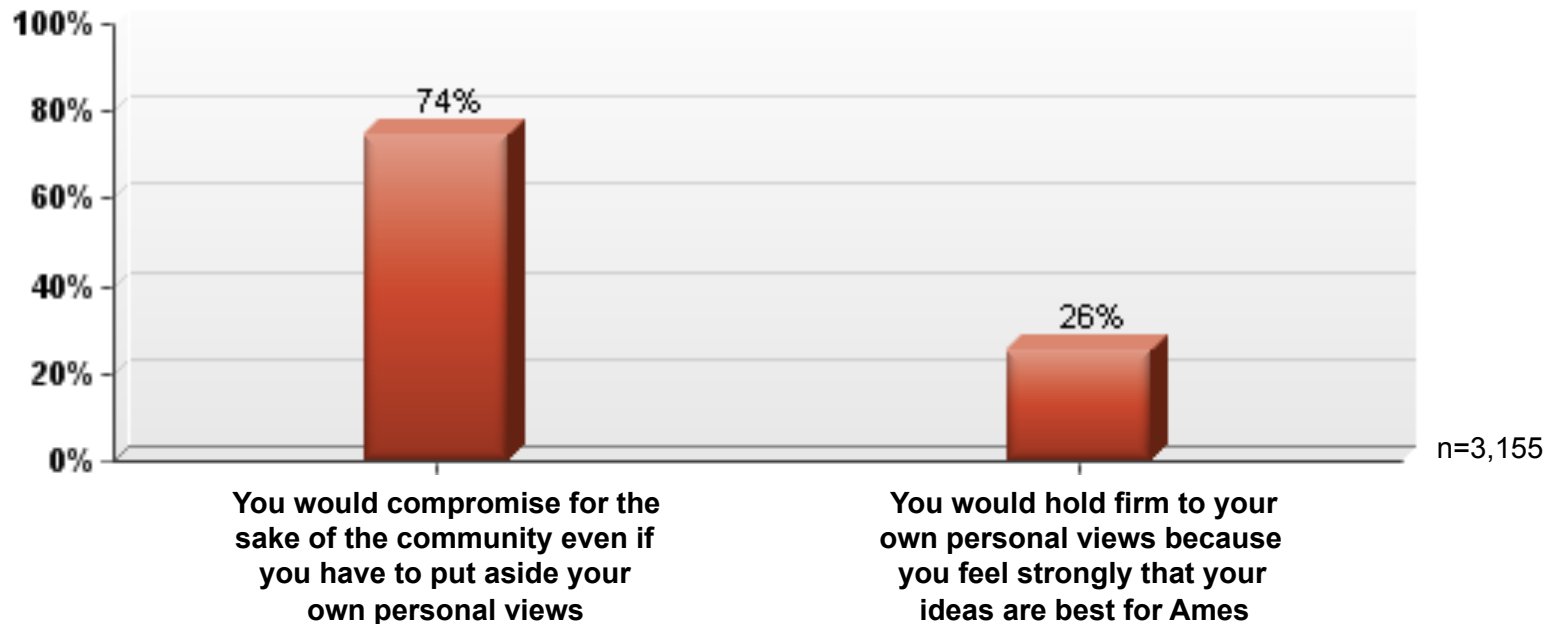


Q. How FAR is the Ames of today from the ideal Ames you envision for the future?

Compromise vs. Hold Firm

Ames Residents Only

One-quarter of residents are not willing to compromise. Note: There were NO SIGNIFICANT differences in these attitudes among Actives, Passives or Non-Student Passives.



Q. Naturally, there is no way to make all of the people who live and work in Ames happy at the same time. Keeping this in mind, how much are you personally willing to compromise your own views for the sake of moving the city forward. Which best describes you? (Select one) 78

Respondent Psychographics

Psychographics By City of Residence

Ames residents possess an enhanced sense of curiosity and a desire for learning and new experiences.

Answer	Outsiders	Ames	Neighbors
Is curious, wanting to explore and learn about new things	56%	64%	58%
Believes strongly in yourself and your abilities	60%	60%	62%
Thinks quality is more important than price	55%	51%	56%
Is extremely family oriented	57%	49%	57%
Takes great pride in the community you live in	50%	47%	52%
Is an independent thinker who challenges what most people think	43%	43%	41%
Enjoys staying at home in the evenings, rather than going out	43%	42%	42%
Is a saver rather than a spender	40%	41%	40%
Makes a point to support smaller providers (like local bookstores and grocery stores) rather than larger, corporate organizations	37%	39%	34%
Is an opinion leader in your circle of friends	34%	34%	35%
Feels most comfortable with traditional values	44%	34%	40%
Wants to live near people like you for shared experiences	35%	33%	30%
Spends most of your free time doing fun stuff with your friends	25%	28%	25%
Is deeply spiritual or religious	22%	22%	22%
Wants to live near people who are not like you for exposure to new experiences	13%	19%	13% ₈₀

Q. How would your friends describe you? Are you the type of person that... (Select all that apply)

Psychographics By City Participation

The major differences between Actives and Non-Student Passives are based on their unique psychographic mindsets...

Answer	ACTIVES	PASSIVES	NON-STUDENT PASSIVES
Is curious, wanting to explore and learn about new things	69%	61%	58%
Believes strongly in yourself and your abilities	64%	57%	56%
Thinks quality is more important than price	57%	46%	49%
Is extremely family oriented	53%	46%	57%
Takes great pride in the community you live in	58%	39%	45%
Is an independent thinker who challenges what most people think	47%	41%	35%
Enjoys staying at home in the evenings, rather than going out	42%	42%	48%
Is a saver rather than a spender	39%	43%	41%
Makes a point to support smaller providers (like local bookstores and grocery stores) rather than larger, corporate organizations	49%	32%	36%
Is an opinion leader in your circle of friends	39%	29%	25%
Feels most comfortable with traditional values	35%	34%	40%
Wants to live near people like you for shared experiences	31%	35%	35%
Spends most of your free time doing fun stuff with your friends	21%	33%	24%
Is deeply spiritual or religious	26%	20%	23%
Wants to live near people who are not like you for exposure to new experiences	22%	17%	14%

Q. How would your friends describe you? Are you the type of person that... (Select all that apply)

Let's Recap...

Executive Summary (1 of 9)

Ames Resident Segments: Actives (41% of survey respondents)

- In general, Actives are our long-term residents (living in Ames for over 20 years) who have a past connection to Iowa State University. They have high standards / expectations for the city and are less likely to consider Ames unique. Actives are more likely to describe the city's personality as intellectual, careful / cautious, or divided.
- Actives have different psychographic mindsets. They are more curious, believe strongly in themselves, and are independent leaders. They are proud and more likely to support local businesses. Their circle of friends would consider them opinion leaders.

Executive Summary (2 of 9)

Ames Resident Segments: Passives & Non-Student Passives (23% of survey respondents)

- Passives tend to be younger and have a current connection to Iowa State University. Over half of Passive residents are students. Therefore, Non-Student Passives were also analyzed as a separate segment.
- Most Non-Student Passives have lived in Ames for a moderate period of time (6-15 years) vs. being long-term residents. About one-quarter of them have no relationship with Iowa State University.
- Opposite of the Actives, the psychographic mindset of the Non-Student Passives is more isolated. They are more family-oriented and prefer keeping a lower profile, staying at home vs. getting involved. They are less curious and different people / new experiences are not as meaningful to them.

Executive Summary (3 of 9)

Ames Resident Segments: Students

- The students are, not surprisingly, less invested in the city. They are more likely to describe Ames as fun and do not have long-term expectations or desires for change. They are more concerned with being social at this point in their lives than taking pride in their community.

Executive Summary (4 of 9)

The City / University Relationship

- The IDEAL relationship between the city and Iowa State University is desired to be far more collaborative than it currently is. And all segments agree on this point. Currently, half of our respondents feel the relationship is either “separate but equal” or led by Iowa State University.

Context for Creating The Vision

- Our context for Ames’ vision should be within the mid-west, the heartland. In other words, creating distinction for Ames among college towns across the nation is not necessary. The focus should be on distinguishing Ames among other cities in Iowa and within the mid-west.
- Ames is in a solid starting position, being viewed as a good city, but not a leader. Non-student residents have higher standards for Ames and are more likely to consider Ames to be a weak city, behind the times.

Executive Summary (5 of 9)

Competitive Landscape

- Ames is considered most similar to other college towns in the mid-west (Cedar Falls, Iowa City, and Manhattan, KS) as well as its retail neighbor, Ankeny. Neighbors/ Outsiders compare Ames to other college towns to an even greater degree than residents do.
- Ames is most associated with being educational/intellectual. Respondents also associate the city with being innovative, small town/big city, and stagnant (not growing or changing).
- As for the perceptions of other cities...
 - Ankeny = Retail
 - Des Moines = Business hub, retail, and opportunities
 - Iowa City = Vibrant/energetic and progressive*

* Survey respondents may have defined “progressive” according to political terms, meaning politically liberal

Executive Summary (6 of 9)

Vision Concepts: Greater Distinction Needed

- Of the four vision concepts tested, the Small Town/Big City idea was the preferred followed by the Education Hub, then Innovation Center, and lastly Opportunity Center. All vision concepts were considered appealing, but NONE of the concepts scored strong on uniqueness. Therefore further work must be done to push the vision for Ames into a more distinct and ownable position.

Executive Summary (7 of 9)

What Makes Ames Unique?

- Employment opportunities, safety and good schools are the top-3 decision drivers when selecting a city in general. However, higher learning opportunities ranked as the #1 reason for choosing Ames and therefore offers a point of distinction.
- Compared to neighbors or outsiders, Ames residents are more curious, wanting to explore and learn about new things. Interestingly, they are less family-oriented, less likely to feel proud of their community and less likely to feel comfortable with traditional values.

Executive Summary (8 of 9)

What Makes Ames Unique? (cont.)

- As for Ames' unique assets, Agricultural / Veterinary Hub outscored all other directions tested. When asked to describe what makes Ames unique on their own, most respondents could not get past a literal geographic description, "Ames is the Center / Middle of Iowa."
- Adjectives such as safe, friendly, comfortable, middle-class, intellectual and welcoming / inclusive describe Ames' personality according to its residents, neighbors and outsiders. However, immediate neighbors feel a little more shut off from Ames – scoring the city lower than other segments on being friendly, welcoming and open-minded for example.

Executive Summary (9 of 9)

The Appetite for Change

- There is indeed a healthy appetite for change among all segments of Ames residents. About two-thirds of Actives, Passives and Non-Student Passives alike feel that Ames is very or somewhat far away from their personal vision for the city. And three-quarters of respondents would prefer to compromise for the sake of moving the city forward vs. holding firm, believing they know what's best for the city.

SWOT analysis

2007 SWOT – Detailed view

SWOT Analysis of the Ames Community February 17, 2007

Community Strengths

- Educated population
- Medical community
- Relatively stable incomes; publicly based
- Diverse economy
- Public library
- Iowa State University
- Strong civic and church organization
- Relatively safe environment
- Strong scientific community; ISU; NADC; USDA; Ames Lab; DO
- Heartland senior services
- Good public transportation
- Slow growth
- Parks
- Ames school district
- Relatively diverse for Iowa
- Good parks and recreation services
- Passionate community
- Midwestern idealistic
- Lots of expertise
- Diverse housing types
- Good city government; city infrastructure
- Wide range of cultural activities
- Where we are located; agriculture center of U.S.
- Wide variety of human services
- Locally owned municipal utilities
- Excellent town/gown
- Downtown is still alive
- Medical clinics and Mary Greeley
- Good community leaders

Community Weaknesses

- Education doesn't do very well with average and below students
- Lack of affordable downtown housing
- Disconnects between different parts and peoples in the community
- Lot of people with tunnel vision; don't see big picture
- Population outside the city impact on enrollment in school and reser
- Dependent on outside for retail
- 1940s traffic patterns
- geography – winter, no ocean; no; mountains
- untapped talents of immigrants, international families
- cost of living and expense of housing
- weak connection between scientists, money resources and manager

- Fewer job opportunities for those less qualified; saturated market with university;
- Us vs Them; university, non university dichotomy;
- Too many experts;
- Lots of property off the tax rolls
- Lot of stratification between people of different socio-economic classes ; not knowing the other exists;
- Emphasis on the “new” at the expense of history to the community’s future;
- Slow growth
- Foreign languages should be offered starting at Pre-K
- Trains are eating us alive!
- Limited affordable child care
- High proportion of employment reliant on public funding
- Lack of true diversity by U.S. standards
- Lack of recreation facilities – no pool
- General resistance to bond issues
- Deterioration of downtown area
- Domination of the political process by realtors and developers; overbuilding of rental properties;
- Challenge of changing diversity in the schools as demographics change
- Limited vision for creative communal solutions
- Lack of parking in general

Opportunities for the Community

- Finding sustainability
- Business growth especially in bio-economics
- Municipal power plant re-powering
- School-community partnerships
- Art of compromise for common goals
- Expanding international markets – health and food; serve growing markets
- Learn from different cultures
- Library expansion and increased funding
- Strengthen cultural fare
- New pool facilities
- Neighborhoods connections rediscovered or developed
- Draw a broader range of people into the political process
- ISU
- Cooperation between the various entities – builders, business, people who make up the government;
- Potential to drive the national dialogue with first in the nation caucuses
- Farm economy cycles
- Leverage I35-I80 crossroads
- Passenger train and bus service expanded
- Revitalize downtown and campus town through cultural and economic development and preservation

- More businesses; assist formation and expansion of start-ups; particularly among immigrant groups
- Addressing our energy resources particularly with public utility and resource recovery
- Capitalize opportunities for tourism and conventions;

Threats for the Community

- Breaking down of communal bonds; neighborhoods; ISU and city; lack of inclusive approach to welcoming new comers;
- Apparent growth stagnation;
- Becoming a community of old people because young people leave and don't come
- Potential bio-fuels “dot com” bust
- Overbuilding of rental units may lead to urban blight;
- Fringe expansion and deterioration of the core
- Federal and state funding cut backs;
- Reliance on ISU/public sector
- Economic realities; someone will need to compromise
- Global warming could wipe out Iowa economy
- Water shortages
- Potential environmental impact of business development on water quality and other resources
- Decreased educational sector as fewer international students come to study
- Declining school enrollment
- More people working outside the Ames community
- Too many initiatives and lack of focus
- Growth – the bigger the community more crime, trouble
- Resources that were formerly supplied by public now supplied by exclusive groups or fees
- Increases in train traffic
- Increase in drug and substance abuse
- Loss of common and shared values
- Culture challenges that increased diversity makes on the schools
- Bio-terrorism and regular terrorism
- lack of entertainment venues for young people

Creating the 2011 SWOT

Using the 2007 SWOT as a starting point, we:

- Removed items that were no longer true/relevant
- Added items that appear new to the conversation
- Created thematic groupings of various related statements
- Employed a traditional SWOT chart in which strengths & weaknesses are considered INTERNAL factors and opportunities & threats are considered EXTERNAL factors – then we arranged the groups into the appropriate categories
- Ranked each list by order of importance as perceived in our qualitative and quantitative research
- Listed a maximum of 10 items in each category

2011 Ames SWOT – High-Level

	Positive	Negative
Internal	<p>STRENGTHS</p> <ol style="list-style-type: none"> 1. Focus on education and educational institutions 2. Scientific community / innovations – agriculture and veterinary expertise 3. Cultural and recreational opportunities 4. Shared “midwestern values” 5. Safe 6. Diverse economy and population (relatively) 7. Stable incomes 8. Health care system and institutions 9. Strong civic organizations 10. Passionate participation 	<p>WEAKNESSES</p> <ol style="list-style-type: none"> 1. Lack of agreement on big picture direction for city 2. Inability to compromise stalls action / decisions 3. Perceived lack of national retail / restaurants (Kohl’s, Dillard’s, Olive Garden) 4. Difficulty accommodating economic and cultural diversity / class stratification 5. High cost of living and housing expenses 6. Few professional / cultural opportunities make it difficult to retain young professionals 7. Unbalanced relationship between ISU and City 8. Trains / Traffic / Parking 9. Lack of competitive differentiation
External	<p>OPPORTUNITIES</p> <ol style="list-style-type: none"> 1. Crossroads of I35-I80 – geographic centrality 2. Growth in and consumer preference for sustainability 3. Consumer appeal of civic revitalization (applies to Downtown, Campustown, the mall) 4. Growth in bio-economics 5. Expanding international markets – health and food 6. Economic recovery – business expansion, opportunities for tourism / conventions 7. First-in-the-nation political caucuses 8. Farm economy cycles 	<p>THREATS</p> <ol style="list-style-type: none"> 1. Impact of neighboring areas on schools and resources – expansion at the fringe may lead to deterioration at the core 2. Job expansion outside of Ames 3. Continuing weak economy - Federal and state funding cutbacks 4. Reliance on ISU / public sector 5. Environmental factors – global warming, water shortages, water quality 6. Increased train traffic 7. Terrorism – bio and traditional

Next Steps

Vision Project Next Steps

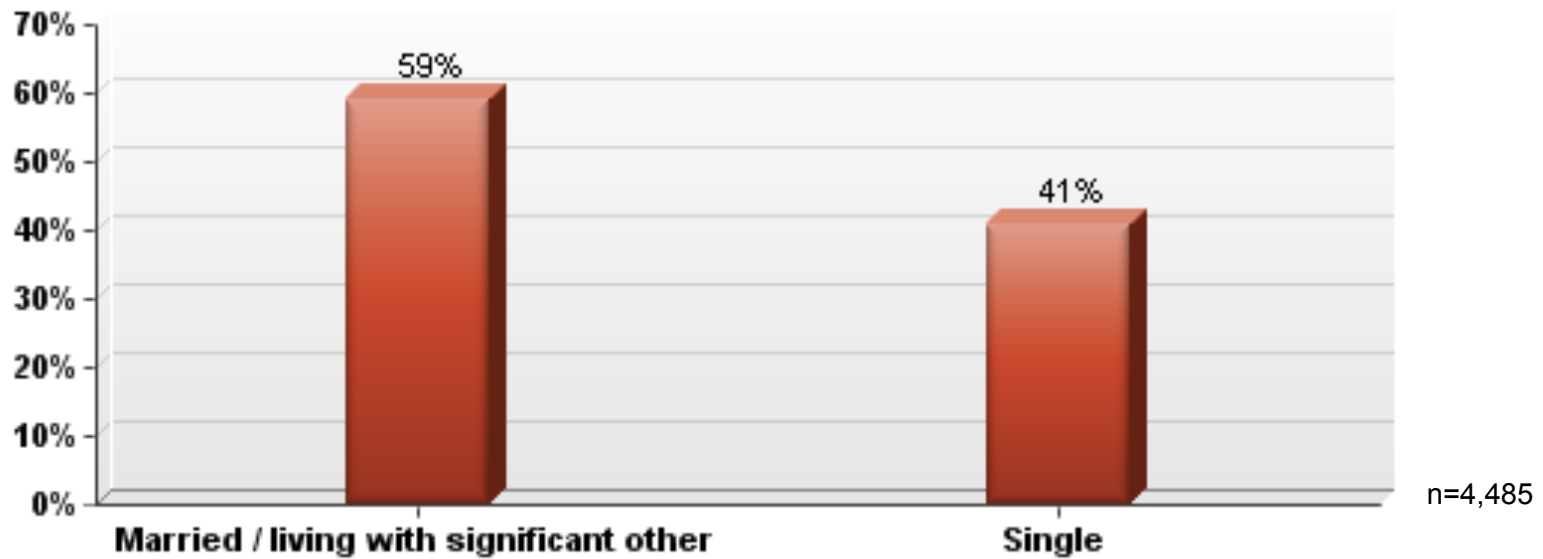
- Clarify any questions from Council about the research
- Develop Vision and Strategic Platform, focusing on points of uniqueness and distinction for Ames, without losing concept appeal
- Present analysis of findings and proposed Vision and Strategic Platform to Steering Committee on May 12 and refine based on feedback
- Present refined findings and Vision and Strategic Platform in citizen workshops on May 24-25
- Refine again based on citizen feedback, and develop implementation recommendations
- Present the final vision to the Steering Committee and City Council on June 13-14
- Perform minor refinements and deliver final document week of June 20

Thank you!

Appendix: Additional Slides

Marital Status

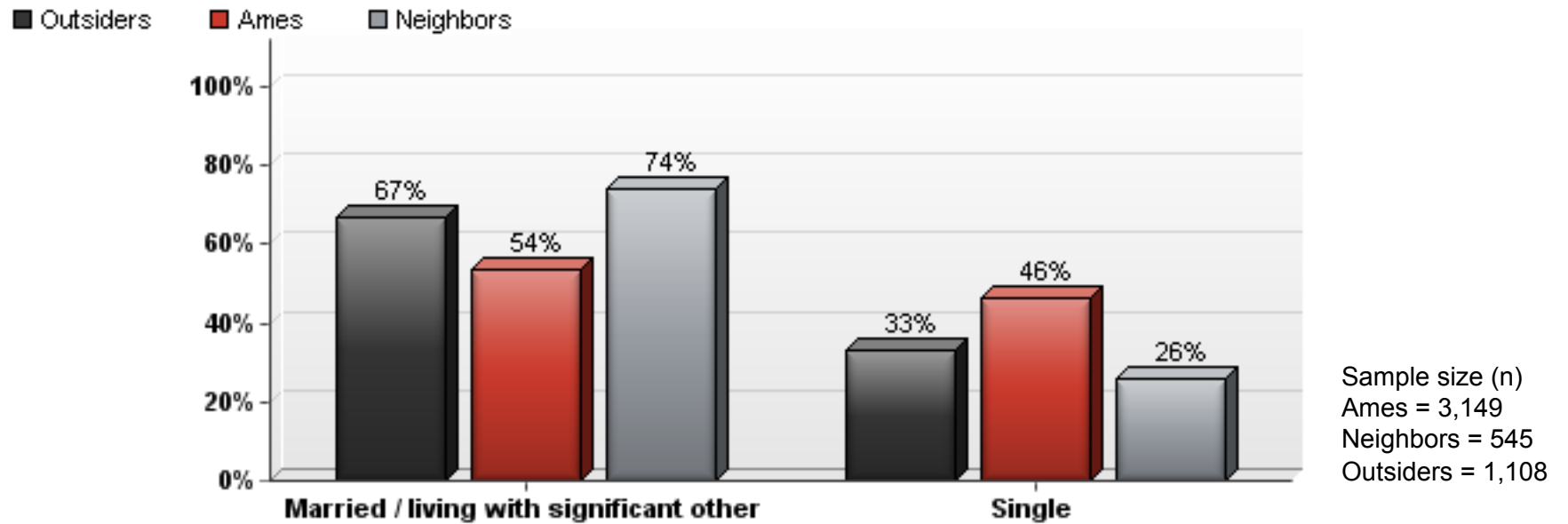
Over half of respondents were married.



Q. What is your marital status?

Marital Status

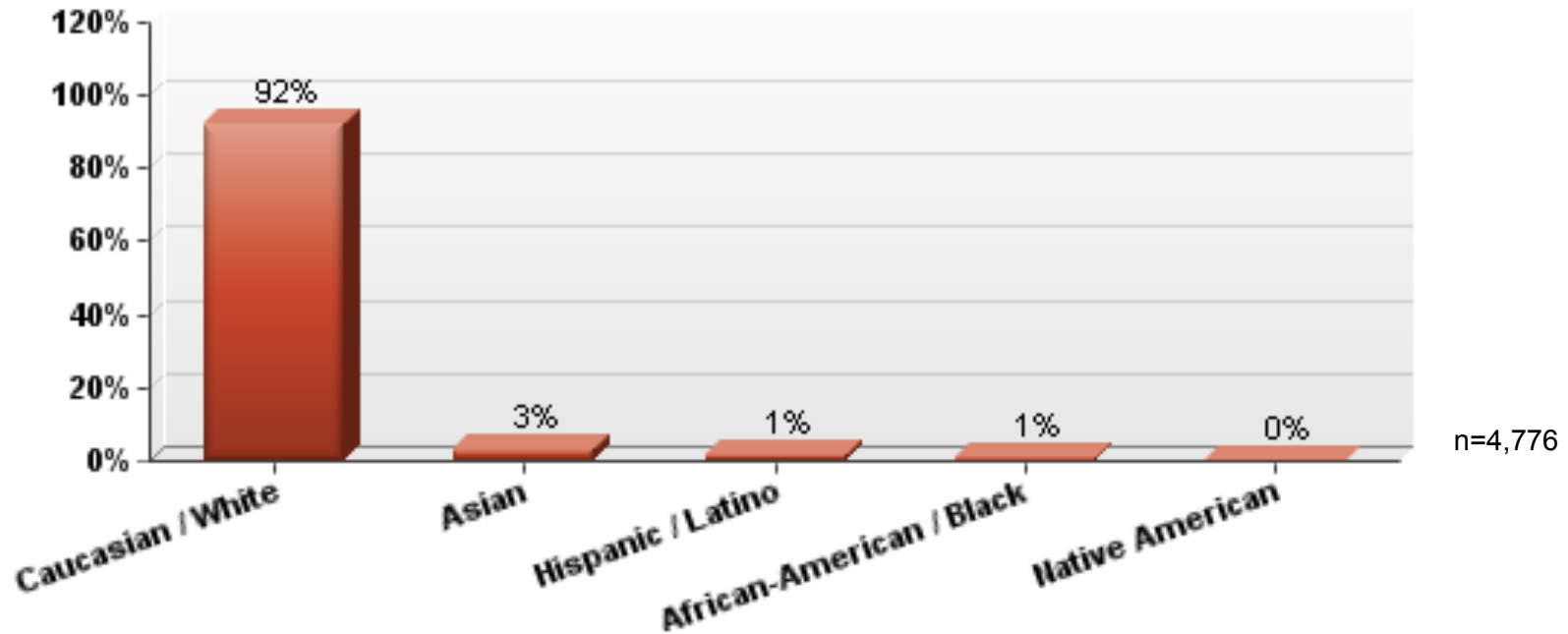
The student population increases the % of single residents in Ames.



Q. What is your marital status?

Ethnicity

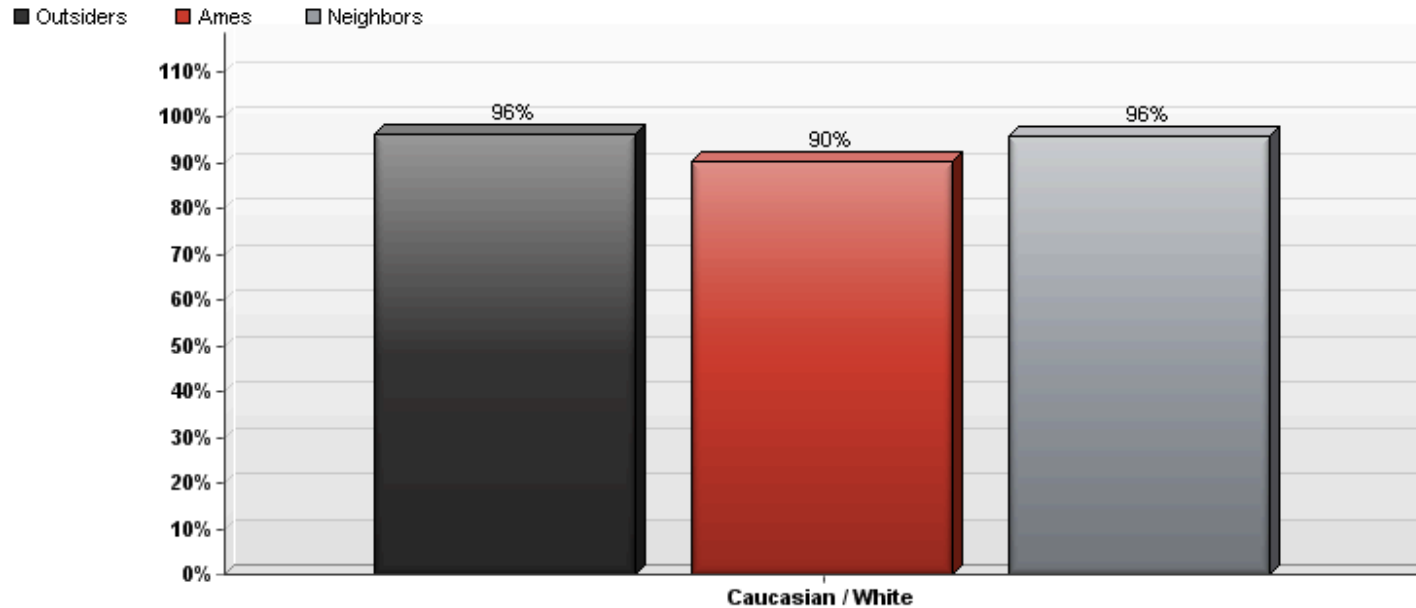
The majority of respondents were Caucasian.



Q. What is your ethnicity?

Ethnicity

Ames is just slightly more diverse than neighbors/outside, though all are primarily Caucasian.

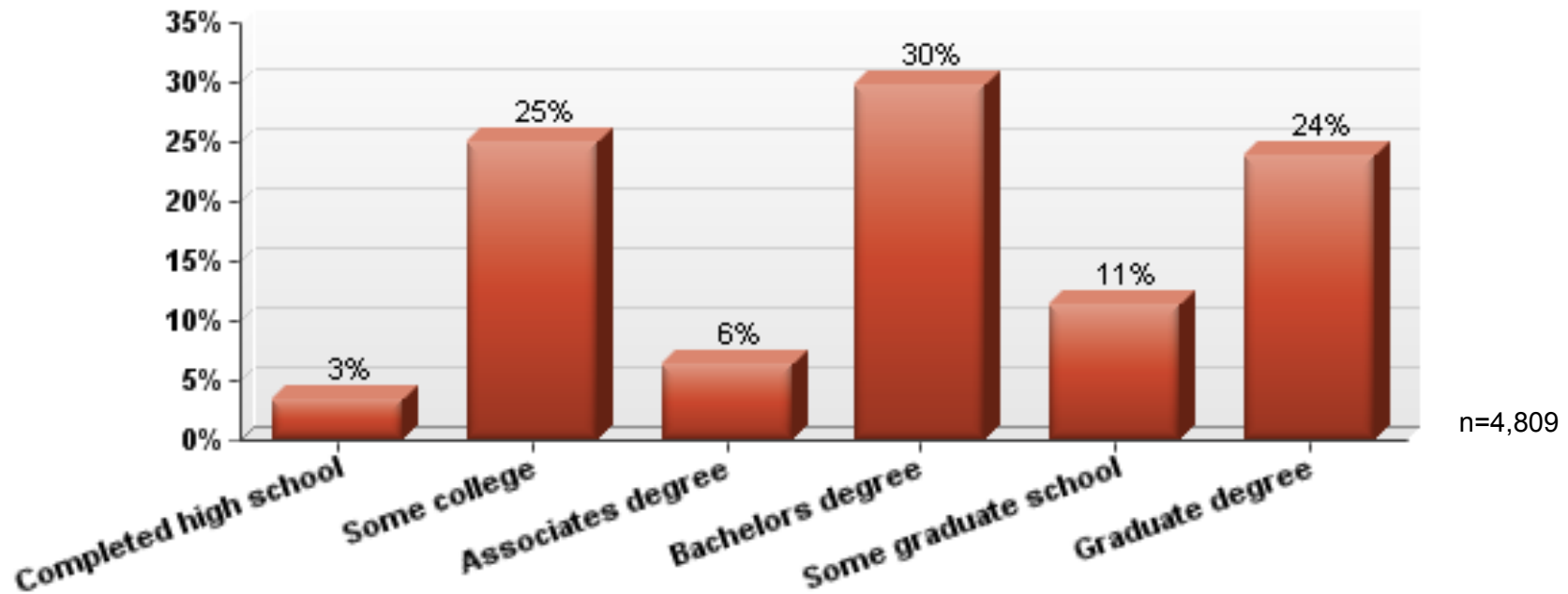


Sample size (n)
Ames = 3,154
Neighbors = 542
Outsiders = 1,100

Q. What is your ethnicity?

Education

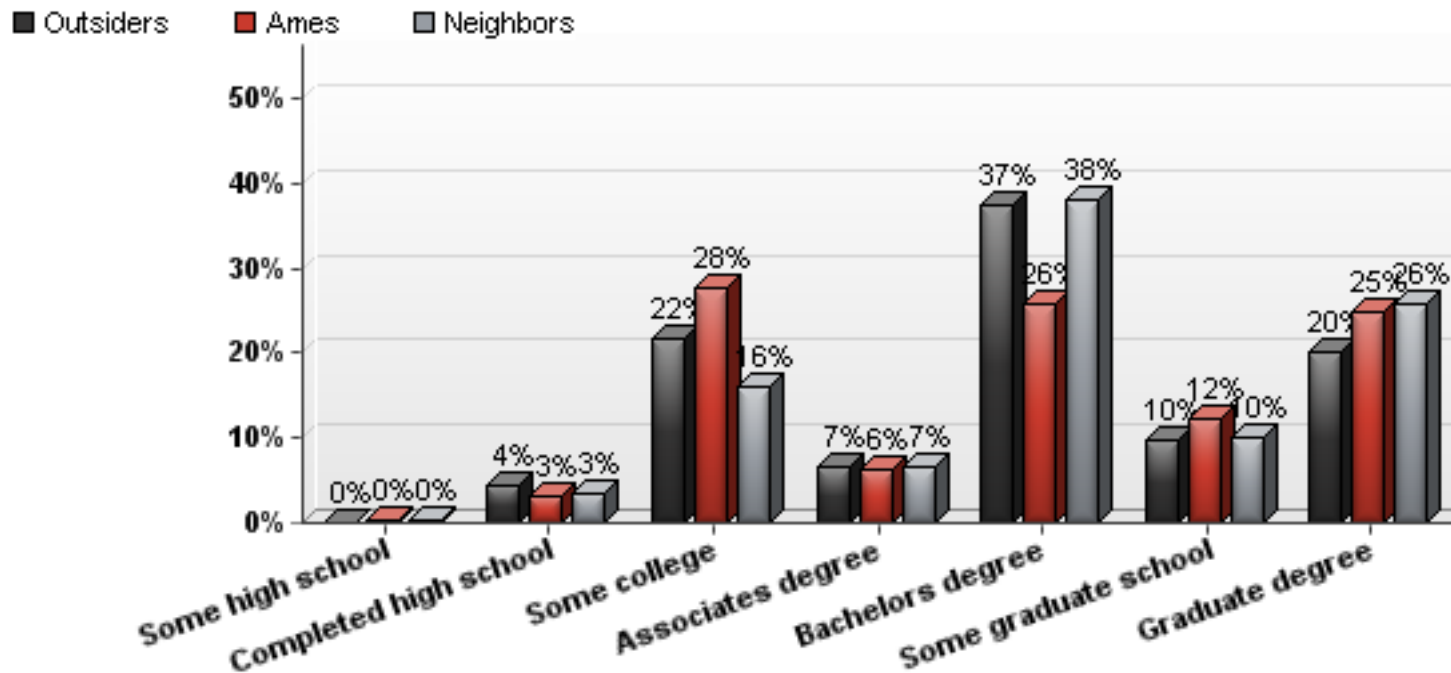
Total respondents.



Q. What is the highest education level you have completed?

Education By City of Residence

The education level in Ames is offset by the fact that so many of our Ames residents were current students. Ames and Neighbors have the highest percentage of advanced degrees.

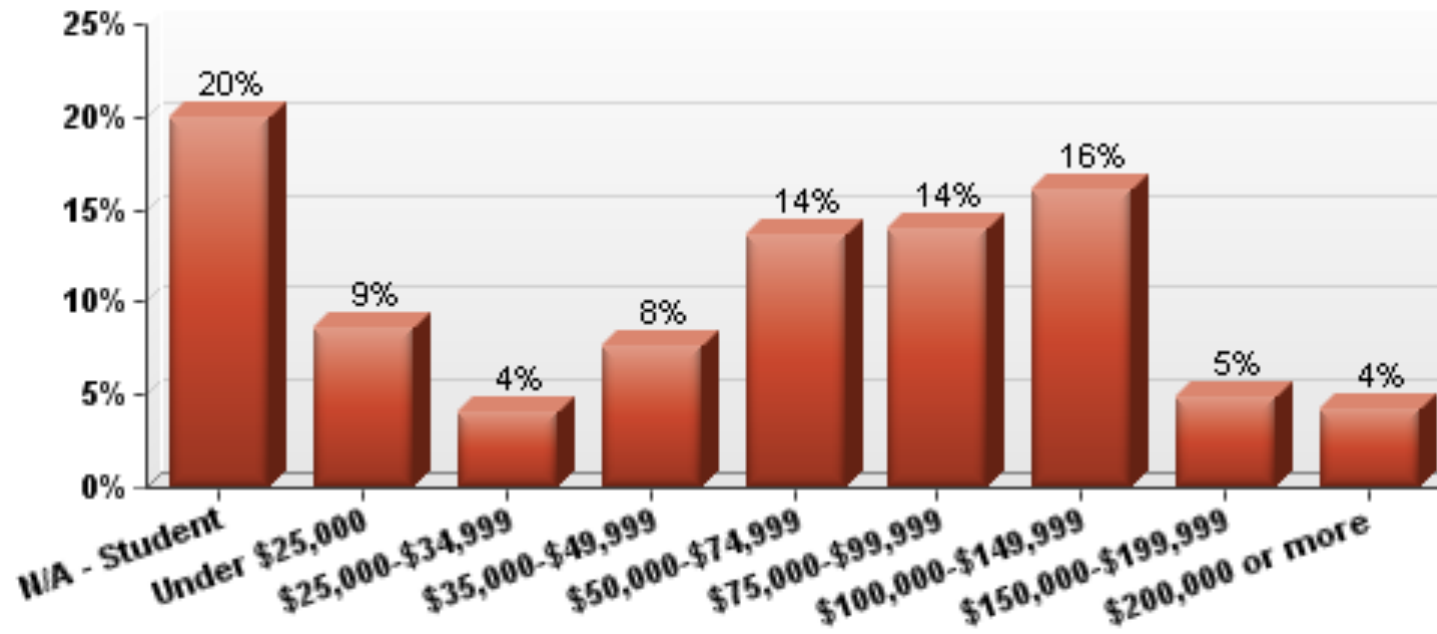


Sample size (n)
 Ames = 3,154
 Neighbors = 546
 Outsiders = 1,109

Q. What is the highest education level you have completed?

Income

Total respondents.

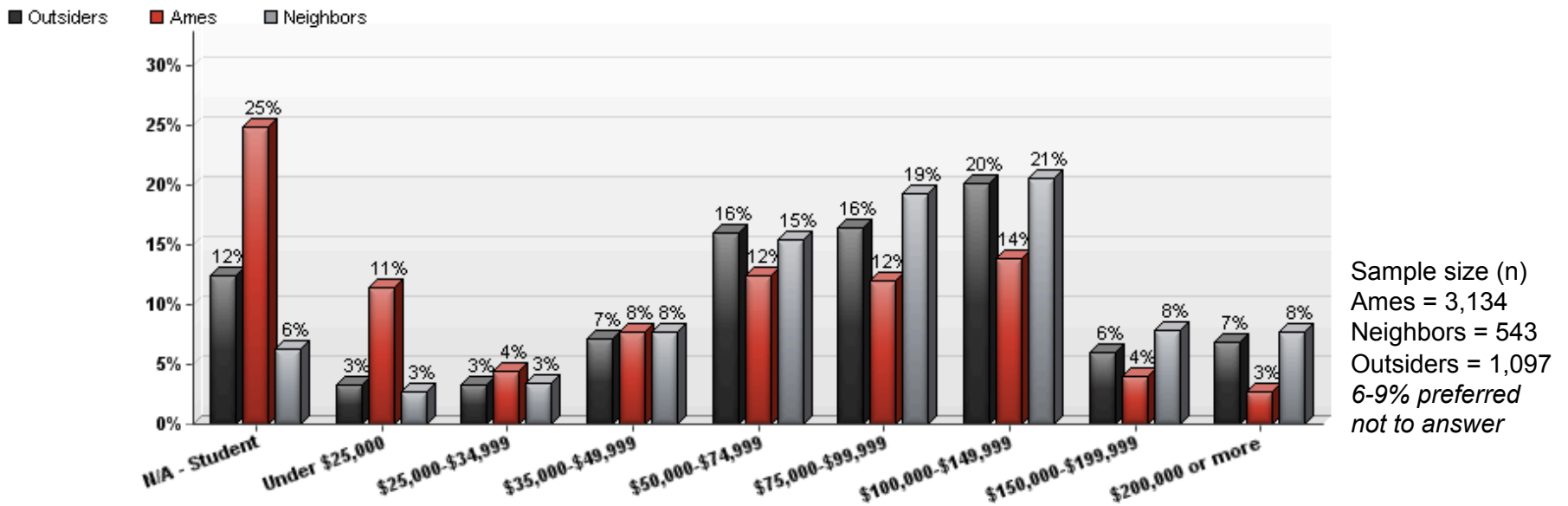


n=4,809
7% opted not
to answer

Q. Which of the following best describes your annual household income before taxes? (Select one)

Income

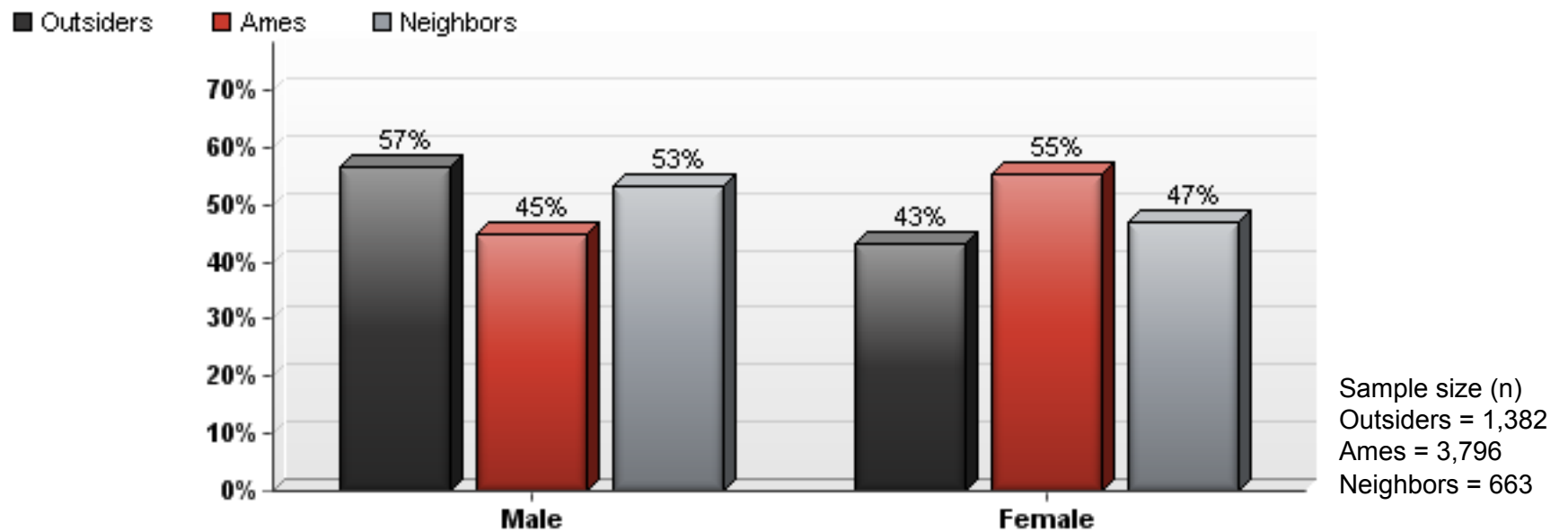
Again, Ames' income levels are impacted by the number of students.



Q. Which of the following best describes your annual household income before taxes? (Select one)

Gender By City of Residence

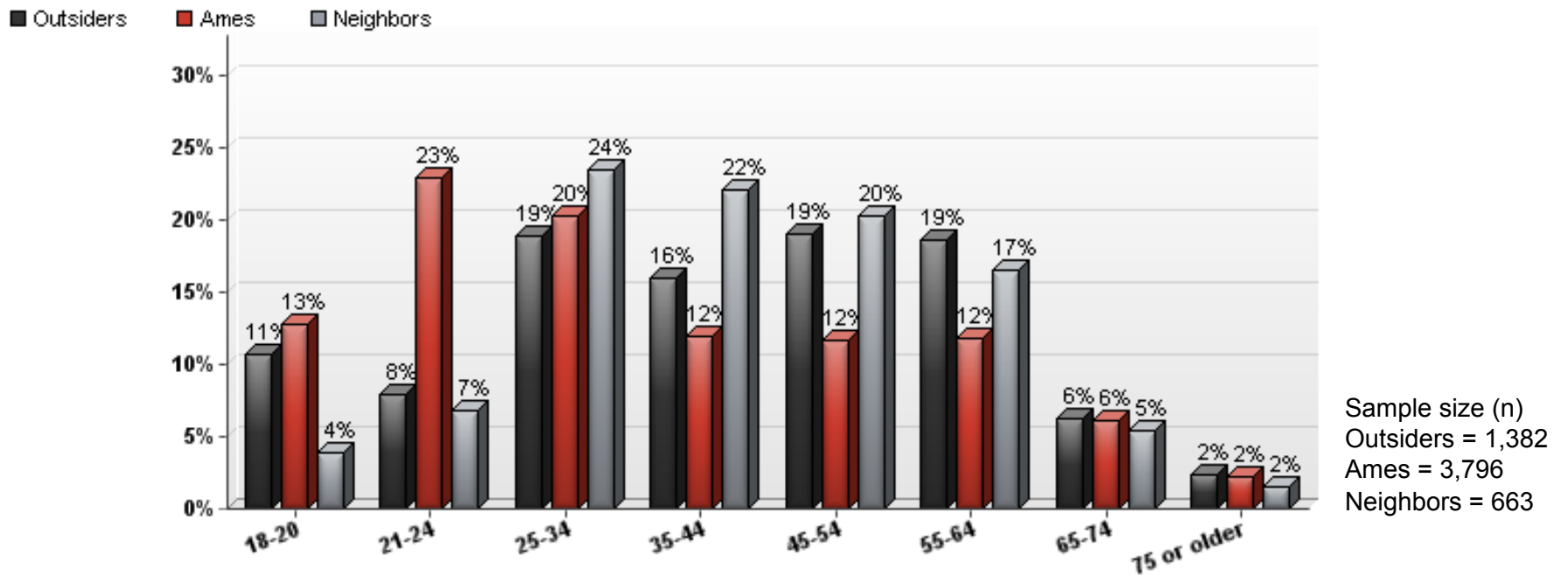
Ames was represented by more females, while outsiders and neighbors were represented by more males.



Q. What is your gender?

Age By City of Residence

With such a large student population, the City of Ames reflects a younger demographic – approximately one-third (36%) were under the age of 25.



Q. Which of the following best describes your age group?

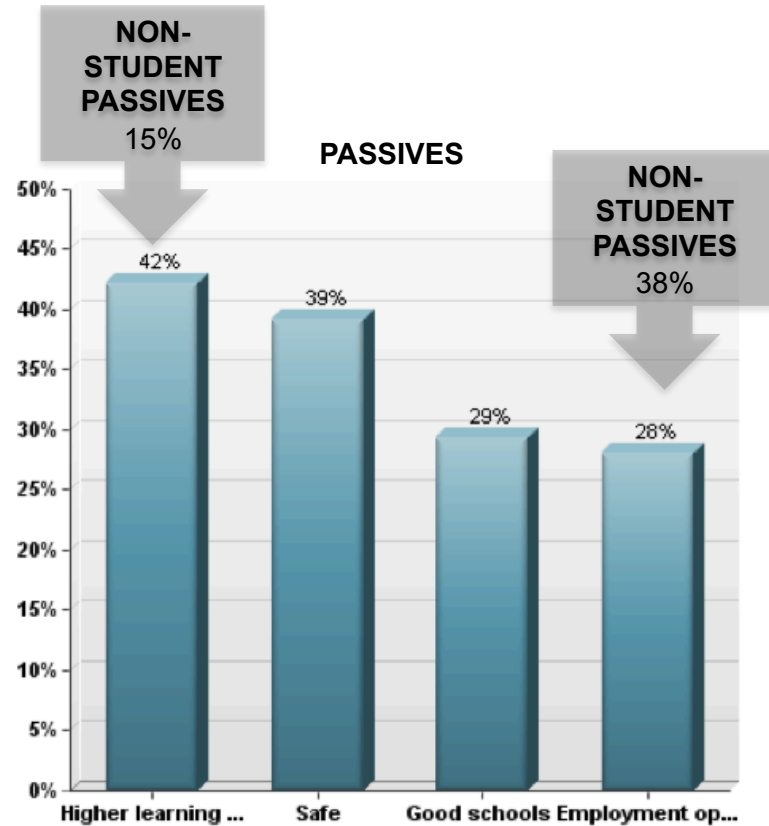
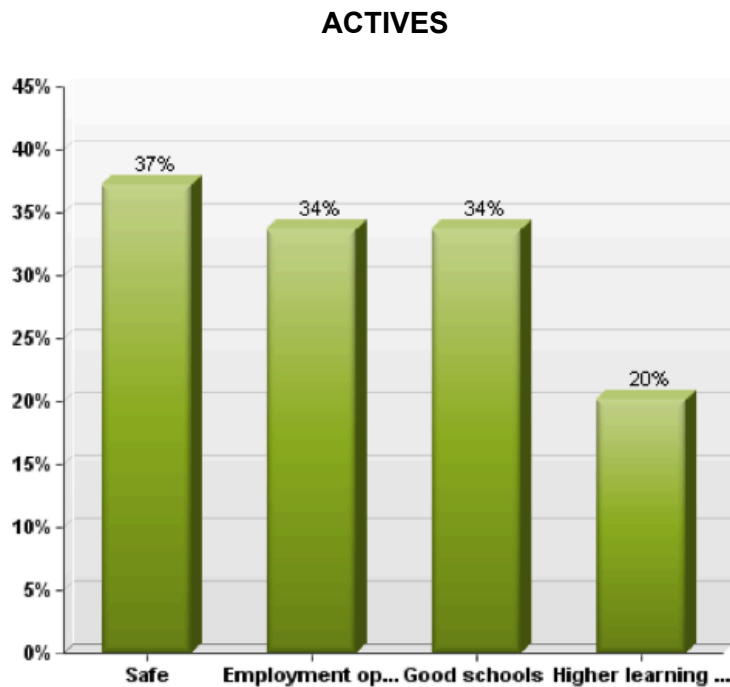
Reasons for Choosing Ames

Answer	Ames	Cities in General
Higher learning opportunities	36%	9%
Safe	35%	38%
Employment opportunities	31%	42%
Good schools	31%	33%
Attractive – clean, well maintained	22%	26%
Convenient location – Interstate access and proximity	18%	7%
Affordable housing / variety of housing options	17%	25%
Basic amenities – like banks, grocery stores, etc.	16%	15%
Community events and sports	15%	8%
Recreational services (parks, trails, open spaces, gyms, pools, etc.)	15%	21%
Culturally vibrant / entertainment options	15%	19%
Medical care and facilities	11%	14%
Family / kid-friendly activities	10%	9%
Locally owned and operated shops and restaurants	7%	10%
Availability of national chains (such as Kohl's Wal-Mart, Dillard's, Gap, Olive Garden, etc.)	5%	11%
Night-life opportunities	5%	7%
Ethnically diverse	4%	3%

Q. Select your Top-3 reasons for living / working in Ames. If you do NOT live / work in Ames, select the Top-3 reasons why you think someone would. (Select up to 3)

Reasons for Choosing Ames By Participation

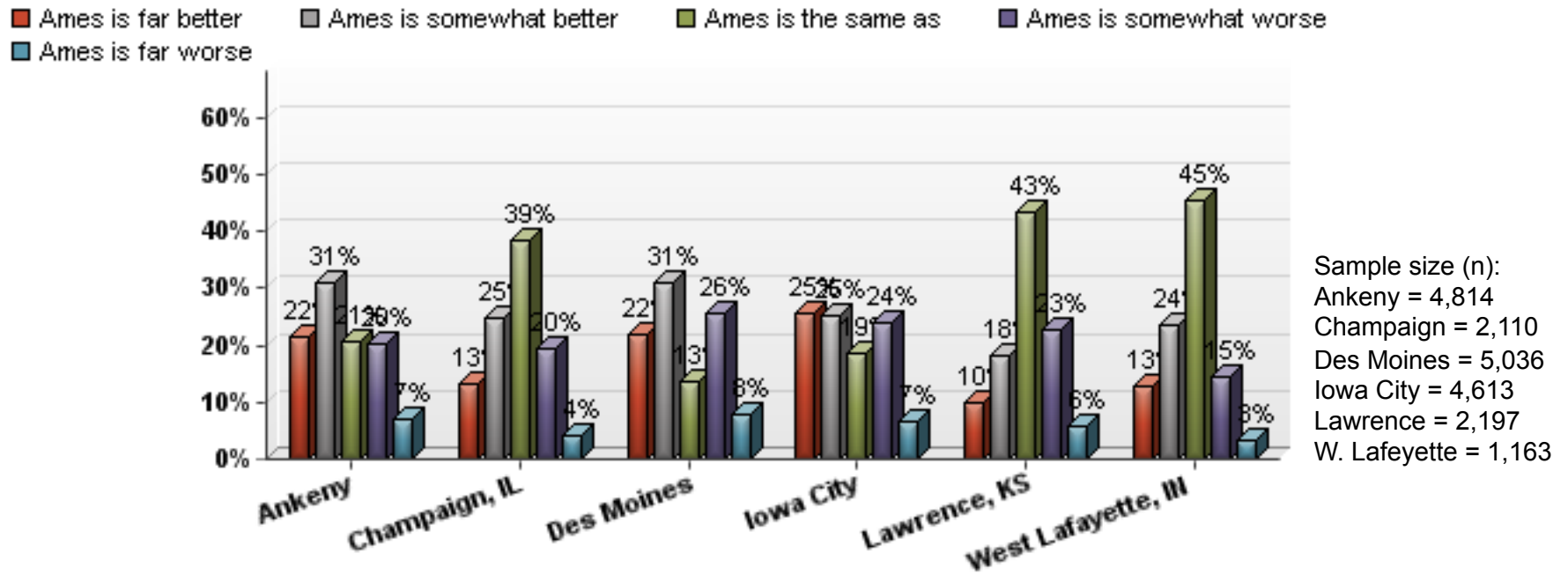
The importance of higher learning also sets apart the Active and Passive mindsets. Our Passives are clearly connected to Ames primarily through Iowa State University; while Actives' top three reasons for choosing Ames are more reflective of what respondents are looking for in a city in general.



Q. When choosing a city to live or work in, which of the following attributes would be on your list of the Top-3 most important to you? (Select only 3)

Ames Is Better / Worse Than

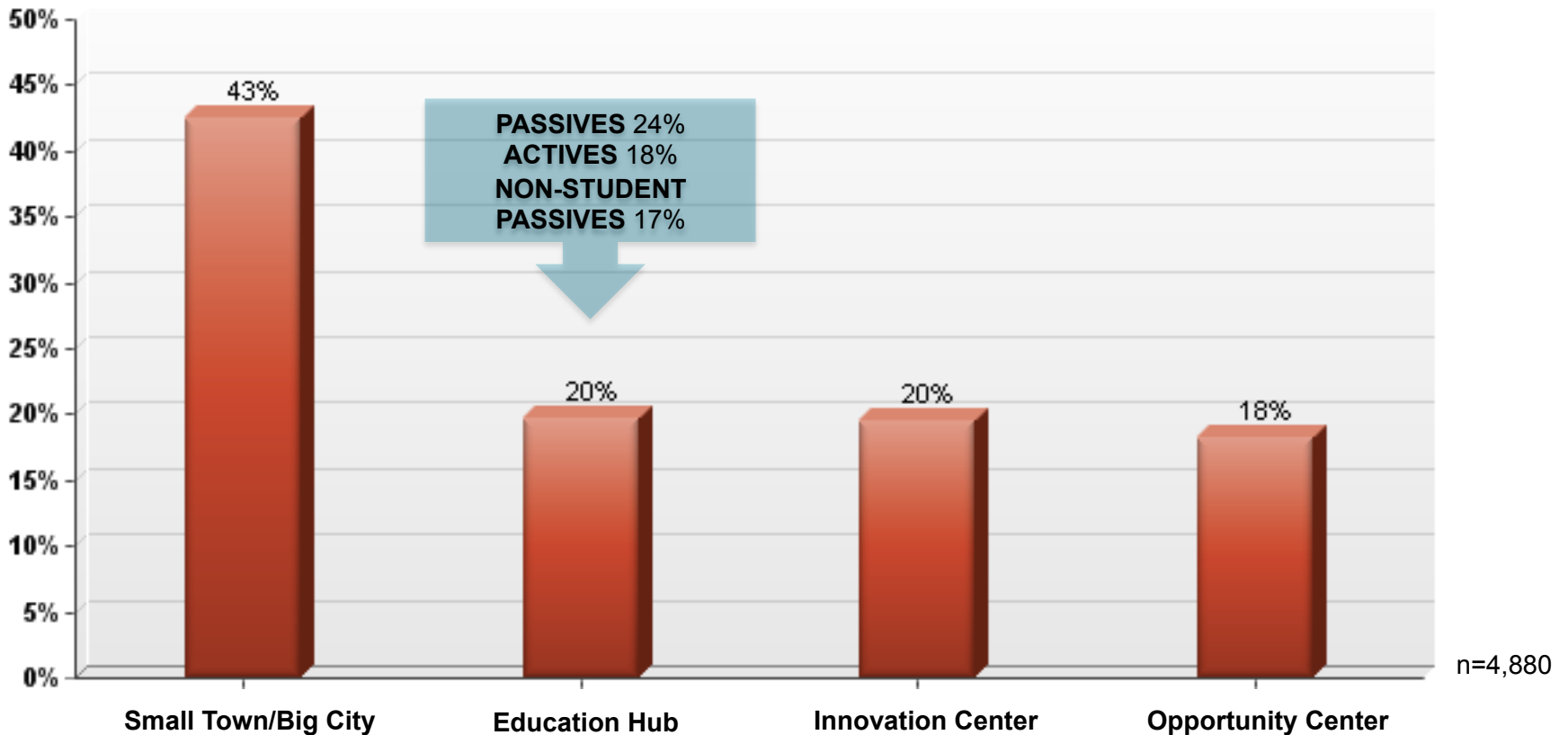
About half think Ames is better than Ankeny, Des Moines and Iowa City. They are less sure about Champaign, Lawrence and West Lafayette, but are less familiar with these.



Q. How familiar are you with each of the following cities in or outside of Iowa? (Select one for each)

Preference

The Small Town / Big City vision continues to lead with the remaining three all being evenly ranked. Not surprisingly, the Passives (made up primarily by students) who have a greater connection to the university are significantly more supportive of the Education Hub concept than the Actives.



Q. Finally, which ONE statement would you personally be proudest to see represent the City of Ames? (Select one) 113