

Iowa Welcome Centers Study

Iowa Economic Development Authority (IEDA) &
Iowa Department of Transportation (IDOT)





*Data collection, benchmarking studies, and
recommendations to modernize state-run
welcome centers in Iowa.*

January 2023

FINAL REPORT

Executive Summary

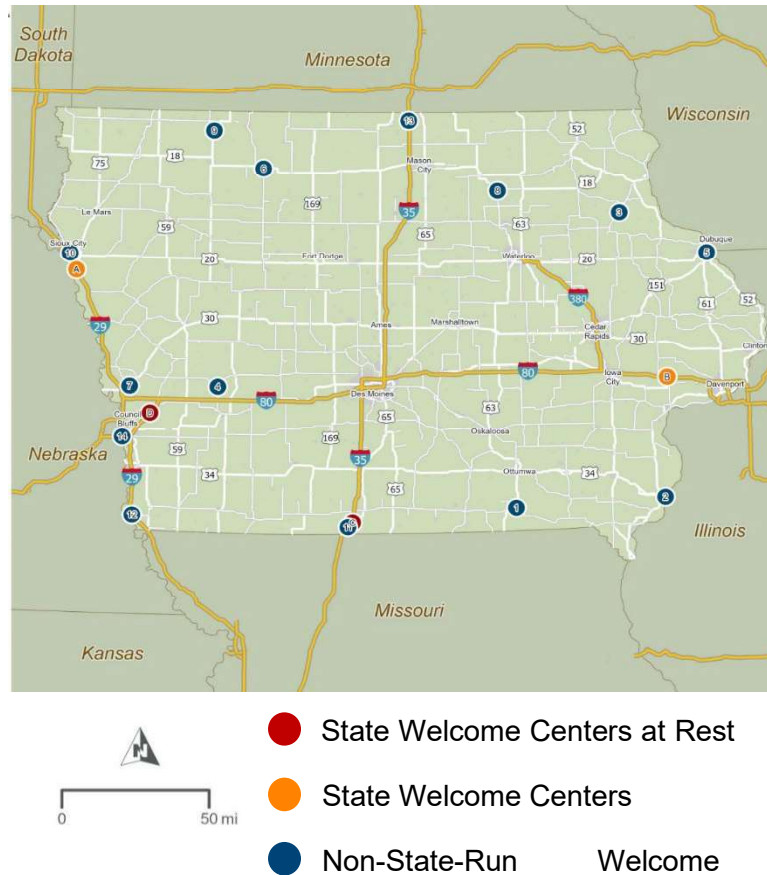
The Iowa Economic Development Authority (IEDA), in collaboration with the Iowa Department of Transportation (DOT), conducted a study of Iowa’s state-run welcome centers located along the state’s key Interstate corridors. This study evaluated the current conditions of state-run welcome centers and developed a series of recommended strategies for IEDA and Iowa DOT to consider for future programming related to public welcome centers. The study is comprised of:

<p>Historic Welcome Center Usage</p> 	<p>A review of visitor counts at Iowa’s state-run and non-state-run welcome centers for the years 2014 through the first half of 2022.</p>
<p>Online Survey</p> 	<p>Summary of public feedback gained from an online survey circulated amongst users of Iowa’s welcome centers and rest areas.</p>
<p>Benchmarking Study</p> 	<p>Summary of feedback gained during interviews with representatives of other state transportation agencies related to their efforts in planning and operating welcome centers.</p>
<p>Analysis and Recommendations</p> 	<p>A menu of recommendations and strategies available to IEDA and Iowa DOT that are tailored based on the findings of the historic welcome center usage, online survey, and benchmarking study.</p>

Iowa's Welcome Centers

Currently, Iowa has 16 welcome centers operating across the state. The majority of these welcome centers are operated by a non-state entity while 2 are funded by IEDA and are thus considered state-run welcome centers; both state-run welcome centers are co-located at public rest areas.

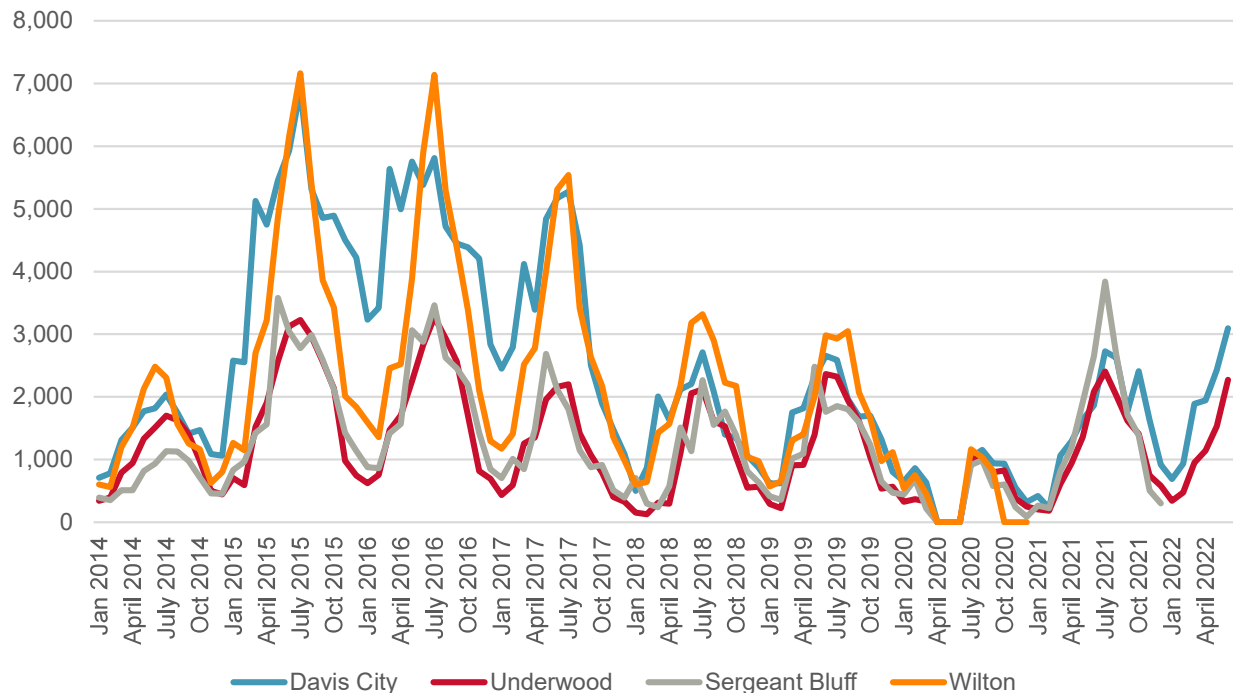
Existing welcome centers, both state-run and non-state run, provide adequate coverage in terms of distribution across the state. The state had previously operated 2 additional state-run welcome centers that have both closed in recent years.



Historic Welcome Center Usage

IEDA provided historic welcome center visitor counts for years 2014 through the first half of 2022, which allowed for a trend analysis related to welcome center usage. Since 2014, visitor counts at state-run welcome centers experienced an overall decline through 2020 which coincided with the COVID-19 public health pandemic. After 2020, visitor counts at state-run welcome centers demonstrated a rebound to pre-2020 levels. It was during this timeframe that IEDA and Iowa DOT closed the Sergeant Bluff and Wilton welcome centers.

HISTORIC WELCOME CENTER VISITOR COUNTS AT STATE-RUN WELCOME CENTERS



Further analysis looked at visitor count patterns related to peak welcome center usage timeframes, which were determined by IDEA to be:

Independence Day Weekend (Friday, July 1 – Sunday, July 3)

- Underwood: Averaged 87 visitors to the welcome center each day, versus an average of 523 people who stopped at the rest area.
 - 16% of people stopping at the rest area used the welcome center.
- Davis City: Averaged 96 visitors to the welcome center each day, versus an average of 644 people who stopped at the rest area.
 - 15% of people stopping at the rest area used the welcome center.

Iowa State Fair (Thursday, August 11 – Sunday, August 21)

- Underwood: Averaged 71 visitors to the welcome center each day, versus an average 532 people who stopped at the rest area.
 - An average of 13% of people stopping at the rest area used the welcome center.
- Davis City: Averaged 77 visitors to the welcome center each day, versus an average of 665 people who stopped at the rest area.
 - An average of 12% of people stopping at the rest area used the welcome center.

Labor Day Weekend (Friday, September 2 – Sunday, September 4)

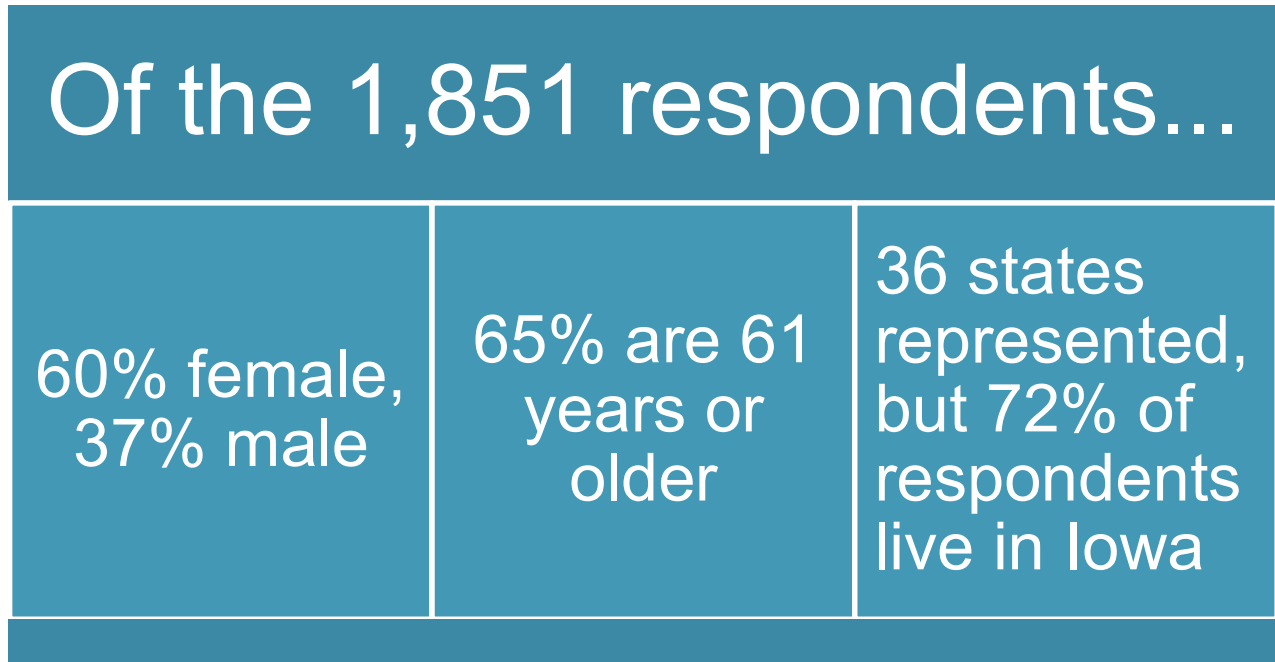
- Underwood: Averaged 54 visitors to the welcome center each day, versus an average 435 people who stopped at the rest area.
 - An average of 12% of people stopping at the rest area used the welcome center.

- Davis City: Averaged 82 visitors to the Welcome Center each day, versus an average of 831 people who stopped at the rest area.
 - An average of 10% of people stopping at the rest area used the welcome center.

Online Survey

An online survey circulated by IEDA sought public feedback on a series of topics, including the use of rest areas, the use of traveler information services, and general opinions on rest area quality, safety, and amenities. A total of 1,851 responses were received.

Major Findings — Demographics



Major Findings – Traveler Information

Respondents to the online survey were asked to share what their purpose for using welcome centers typically is, and one of the most common responses was for getting travel and tourist information in hard copy format. Other common responses are shown in the word cloud below.

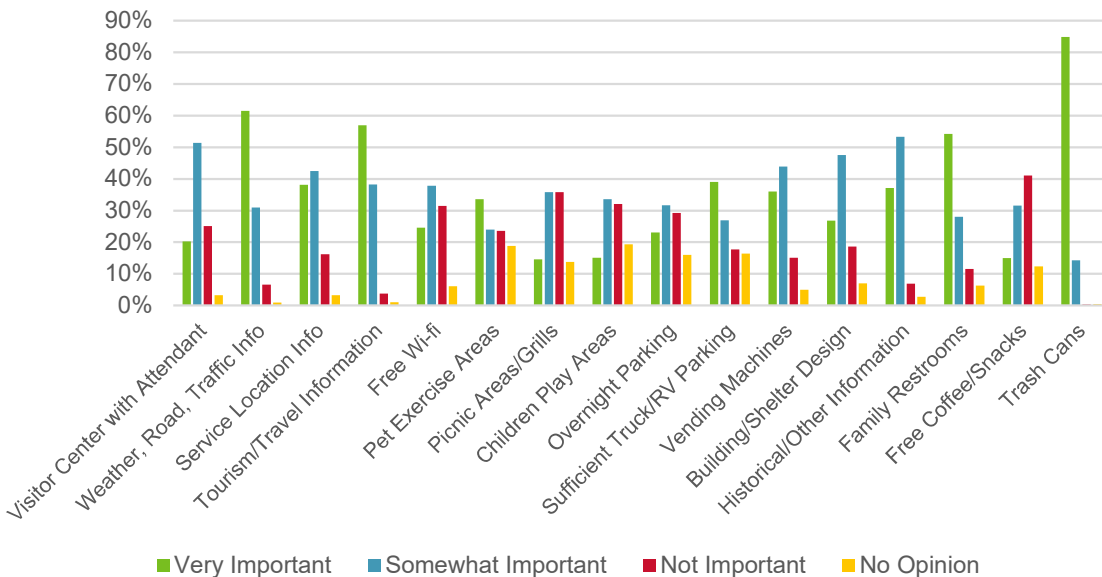


Major Findings – Rest Area Amenities

When asked to share what rest amenities they valued most, survey participants shared the following:

- Highest percentage of “Very Important” ratings were trash cans, weather/road/traffic information, tourism/travel information, and family restrooms.
- Highest percentage of “Not Important” ratings was free coffee/snacks.
- Amenities that were split between “Somewhat Important” and “Not Important” ratings included free wi-fi, picnic areas/grills, and overnight parking.

How Important are the Following Amenities at Rest Areas?



Major Findings – Safety

Overall, participants in the survey rated the safety of Iowa rest areas as Very Good, or Good, and 68% of respondents indicated that they felt safe stopping at the rest areas at night. When asked what would improve the feeling of safety at the rest areas, common responses included the following:

- Better and/or brighter lighting
- Security guard, attendant, and/or the presence of police/state patrol
- Lockable, single-door restrooms, instead of multiple stalls
- Monitored surveillance cameras
- Emergency phone or emergency “panic button”
- Separation of the rest area from overnight parking
- Parking closer to the rest area entrance to increase safety/comfort of those traveling alone
- More open space around walkways and rest area entrances to provide a clear view of surroundings while walking to/from parking lot

Benchmarking Study

Interviews with representatives for welcome/travel information centers in five neighboring states were conducted to better understand how they operate their welcome centers and the types of strategies that are pursuing to meet tourism goals related to these facilities. The states interviewed include South Dakota, Missouri, Illinois, Nebraska, and Minnesota. The common themes identified through the benchmarking study include:

- All five states track visitor numbers at their state welcome/information centers. A variety of methods are used, including center door counters, clickers, and tally hard count performed by the travel counselor.
- Four out of the five states interviewed noted a drop in visitor numbers following the COVID-19 pandemic. Two of the states, however, are starting to see numbers climb again this year.
- Three states have their information centers open year-round, while two states operate seasonally over the summer travel months (mid-May through mid-September).
- One state staffs their information centers only over the weekends, with the remaining states staffing between five and seven days a week.
- Three states have experienced some staffing issues this year, which has occasionally affected operations and business hours.
- Three states noted that more people are relying mostly on cell phones and digital information, but they still like to have hardcopies on hand and still request hardcopy information.
- Three states host activities or promotions at their information centers for tourism week and other events.
- Two states have photo ops or additional amenities in the welcome center to draw visitors into their welcome centers.
- Two states have travel information available outside of business hours at their information centers.
- Two states had to permanently close one or more locations following the pandemic.
- Two states feel that staff retention and salaries are among their biggest challenges.
- Four out of the five states interviewed use some sort of tourism outreach, most often e-newsletters. One state actively uses social media.






Every state feels their information centers are valuable to their state tourism, but they recognize the needs of the traveler have changed. They would all like to do more in the future to address these needs.

Analysis and Recommendations

Based on the historical visitor counts, online survey, and benchmarking study, a series of recommendations were developed for IEDA and Iowa DOT to consider when programming future welcome center improvements. The recommendations are rooted in the key trends and observations gained through the historic visitor trends analysis, public feedback related to the online survey, and feedback gained from peer agencies during the benchmarking survey. Based on the key trends and observations, as well as historic budget allocations for welcome center operations, three scenarios were developed to help guide IEDA and Iowa DOT with planning future welcome center operations and improvements.

Key Trends and Observations

Key trends and observations were used to inform the development of recommendations and strategies available to IEDA and Iowa DOT. The prevailing trends and observations for the Iowa's state-run welcome centers are:

 <p>Low percentage of non-Iowa users</p>	<p>Over 65 percent of survey takers who reported visiting a welcome center live in Iowa. This presents an opportunity to increase promotion and marketing of welcome centers to capture non-Iowa visitors.</p>
 <p>Most users are 65+</p>	<p>Most welcome center users are 65 years or older, and these users often visit welcome centers for travel and tourism information. With the advent of smart phone technology, the number of future welcome center users who rely on hardcopy materials is likely going to decline which presents an opportunity to decrease investment in these materials and shift to digital mediums of information.</p>
 <p>Highest welcome center usage is during May through October</p>	<p>Peak welcome center usage is during the spring and summer months, which aligns with peak travel season. This presents an opportunity to transition state-run welcome centers to be staffed only during these months, thereby decreasing wages and other costs related to their operations.</p>
 <p>Staffing welcome centers is a challenge</p>	<p>The difficulty in finding welcome center staff presents a challenge to maintaining or increasing investment. A “floating” staff member that splits time between welcome centers could help address staffing shortages.</p>
 <p>Travel and tourism information are the main purpose of welcome center visits</p>	<p>Demand for travel and tourism information are key purposes for usage. Promoting welcome centers as convenient facilities for finding this information could induce additional usage.</p>

Historic Investment in State-Run Welcome Centers

IEDA’s historic budget allocations for state-run welcome centers have been declining since 2020. A major contributor to this decline is a difficulty in staffing welcome centers; the 2022 funding level represents an approximate 50 percent staffing at the two welcome centers (approximately \$100,000). IEDA indicated that the budgetary allocation for 2020 represents a near 100 percent staffing at the two welcome centers (approximately \$200,000). These budgetary allocations were used to inform the investment scenarios that conclude this study.

Fiscal Year	Budget
2019	\$190,463
2020	\$199,710
2021	\$171,717
2022	\$111,439

Investment Scenarios

	<h4>Increase Investment in Welcome Centers</h4> <ul style="list-style-type: none">• Fund welcome centers at or near FY2020 levels—\$200,000 / year• Assumes 100% staffing at welcome centers• Assumes budget of \$30,000–\$50,000 / year for marketing and promotional materials
	<h4>Decrease Investment in Welcome Centers</h4> <ul style="list-style-type: none">• Funds welcome centers only for travel and tourism materials, marketing purposes—\$25,000 / year• Assumes unstaffed welcome centers• Assumes budget of \$12,000–\$30,000 / year for marketing and promotional materials
	<h4>Maintain Existing Investment</h4> <ul style="list-style-type: none">• Fund existing welcome centers at current level of investment—\$100,000 / year• Assumes 50% staffing at welcome centers

Conclusion

Given the observed trends related to the aging population that is mainly located within Iowa and relies on welcome centers for hardcopy travel materials, it is recommended that IEDA and Iowa DOT considers a potential transition away from its current system of funding welcome centers to either a partnership structure in which IEDA and Iowa DOT produce materials for the welcome centers while operations are overtaken by a non-state entity, or to completely hand over the welcome center facilities to a non-state entity. Adding to the demographic trends related to welcome center usage is the difficulty expressed by IEDA and Iowa DOT in staffing the current welcome centers. Should fewer individuals be visiting these locations in the future, the costs of funding these facilities may rapidly outweigh the benefits. Under this scenario, IEDA and Iowa DOT would be better positioned for success in reaching tourism goals by divesting in state-run welcome centers and putting those dollars towards other tourism-focused efforts.