Iowa Tourism Industry

SITUATION ASSESSMENT

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travel
IOWA

Table of Contents

About this Report: This report reflects the current perceptions of those who participated in the industry interviews, focus groups, community listening sessions, and survey based on the questions they were asked. Coraggio's interpretations of these perceptions are noted throughout the report as Insights and Implications. Quotations were captured as stated by respondents without attribution to protect their anonymity. In some cases, stakeholder perceptions varied; thus, the Iowa Tourism Office (ITO) may need to undertake further exploration to better understand certain stakeholder perceptions.

Introduction

The COVID-19 pandemic has brought unprecedented disruption and uncertainty to the global economy. The travel and tourism industry has been among the hardest hit, having experienced steep declines across a range of key performance indicators, including, but not limited to, air travel, meetings and conferences, occupancy rates and tax revenue. Through it all, Iowa's tourism industry has shown its resilience and determination to emerge from the pandemic stronger and more vibrant than ever. The commitment of stakeholders – Iowa Tourism Office (ITO); local, regional, and state partners; community specific attractions and destinations; etc. – to a comprehensive strategic planning process reinforces the collective desire in Iowa to set a new course of action that will enhance the tourism industry's long-term competitiveness.

To this end, ITO has partnered with Coraggio Group to develop a Five-Year Strategic Plan for the industry to help further strengthen and grow Iowa's tourism economy. This Situation Assessment was informed by industry stakeholders through a robust engagement process facilitated by Coraggio and supported by the Iowa Tourism Office. It highlights key themes and strategic implications for the industry to consider as it develops its Five-Year Strategic Plan.

Methodology

This report is a synthesis of the data collection and stakeholder engagement efforts conducted by Coraggio Group on behalf of the Iowa Tourism Office (ITO). The purpose of this effort was to gather insights on the current state of Iowa's travel and tourism industry and to identify current and emerging opportunities and threats. This report is not a strategic plan or an identification of priorities, but it will help inform the process and the eventual development of the tourism industry's Five-Year Strategic Plan.

Coraggio began this work by engaging in external research and a review of documents and data provided by ITO, followed by outreach to industry stakeholders for information. Coraggio developed questions for stakeholders on the following topics:

1. Vision and Mission
2. ITO and Iowa's Reputation
3. Role Importance and Effectiveness
4. Impacts of COVID-19 and Recovery
5. Tourism Drivers, Assets, and Experiences
6. Tourism Support and Enablers
7. Threats and Opportunities

Stakeholder perspectives were captured through 18 one-on-one interviews, four industry-led focus groups, ten listening sessions conducted across the state, and two online surveys (one focused on the general industry and another specific to tourism programs) that were launched Summer 2021. More than 800 stakeholders participated in the engagement process in one form or another.

Figure 1 – Survey Respondents by Affiliation   N=559

Please choose the category below that best describes your primary organization/business or affiliation with the Iowa Tourism Office (ITO).

11%	Local DMO/ CVB/Chamber of Commerce	14%	Arts, Culture & Heritage Experiences	7%	Attractions	2%	Media & Marketing Partners
10%	Government Agency/ Elected Official	8%	Food & Beverage	7%	Outdoor Recreation & Activities	6%	Other
10%	Economic Development Organization	8%	Events	1%	ITO Staff	2%	Nightlife & Entertainment
9%	Resident	2%	Retail & Shopping	3%	Lodging & Accommodations		

Figure 2 – Survey Respondents by Location Type   N=549

Does your organization serve primarily urban, suburban, rural or statewide locations?

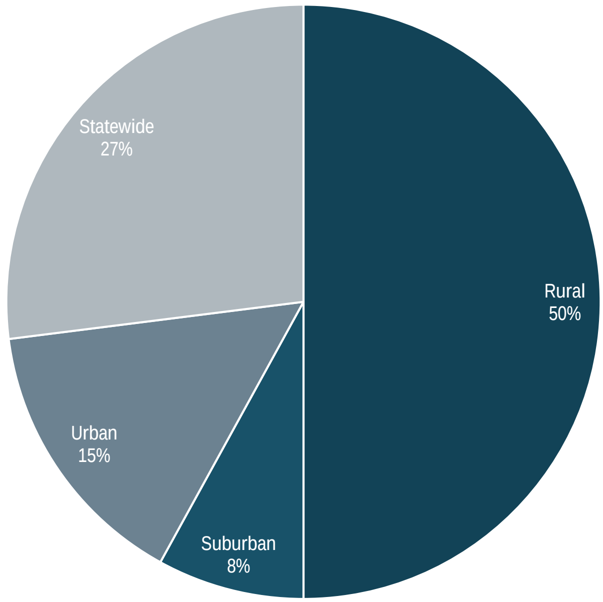
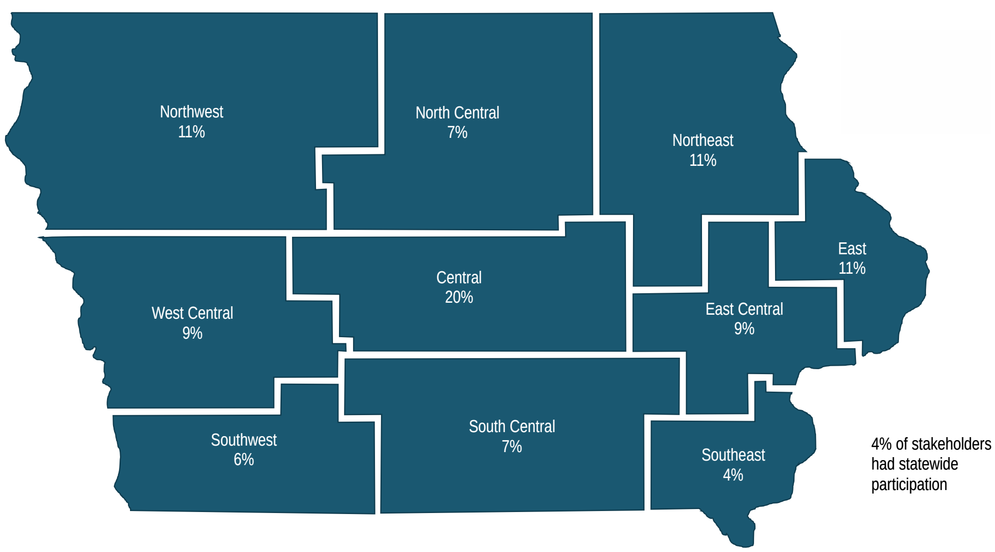


Figure 3 – Survey Respondents by Region   N=559

Please choose the region that most closely aligns with the majority of your participation in travel & tourism.



With these stakeholder inputs, quantitative questions were analyzed using category means, percentage rates, and frequencies. Qualitative, open-ended questions were analyzed by assigning themes influenced by response content and Coraggio's interpretation of those responses.

Coraggio then synthesized findings from all these data gathering efforts into key themes for ITO to consider as it works with the industry to craft a Five-Year Strategic Plan. Each theme is supported by relevant data and unattributed quotations from the stakeholder engagement phase of the work.

Macro Travel Trends

Demand for travel is always changing. Being aware of how these tides are turning and what the future might hold is critical for all destinations. This awareness enables greater strategic thinking and the development of more effective and impactful marketing and operational strategies. In addition, it contributes to enhanced quality of life for residents, improved visitor experience, and positive brand development over the planning horizon.

This section of the report separates demand into two categories:

- **Demand Travel Trends:** What general demand trends are relevant today and need to be considered?
- **Supply Travel Trends:** Across the tourism industry, what key shifts are happening within accommodations, dining, retail, food and beverage, and attractions?

Demand: Travel Trends

Outdoor Recreation Is More Popular Than Ever: As the pandemic took hold, people visited the places they could safely visit while maintaining recommended social distancing: the great outdoors. They picked up hiking, cycling, golfing, and winter sports at a fast rate and headed into open spaces in large numbers. At a lesser rate of growth, people also picked up niche outdoor activities such as birding, kayaking, and surfing.[1] State and regional parks reported record numbers of visitors as evidenced by full parking lots, busier trails, and other indicators of higher use.[2] Retail establishments also reported greater demand for products needed for outdoor adventure, with some bike shops having low to no inventory for sale.[3] However, group outdoor activities, such as flyfishing excursions and guided tours, have been negatively impacted as group travel has not yet rebounded.[4]

Demand for Rural Destinations Grows: Rural destinations carry their popularity of 2020 into 2021 and beyond. Ninety percent of travel searches in 2020 were for rural areas, and cabin rental searches have increased 143% since 2019.[5] Rural destinations account for 22% of all Airbnb's room nights globally in 2021, up from 10% in 2015.[6] Family travel to rural destinations increased from 32% of family room nights to 42% of family room nights between 2019 and summer of 2021.[7] COVID-19 shifted demand to areas perceived to have fewer people, fewer crowds, and open spaces where social distancing is easier.

The Release of Pent-Up Demand for Domestic Leisure Travel: Pent-up demand has begun to convert to actual trips in 2021 as vaccinations become more widespread and higher-income travelers look to spend their increased savings from the 2020 trips they could not take. The U.S. Travel Association and Tourism Economics are reporting that domestic leisure travel was at 92% of 2019's figures in Q2 of 2021, and they predict a 99% recovery in 2022 followed by 102% in 2023.[8]

Effects are felt across the industry: Marriott International reported Q2 sales that were more than double compared to the same period last year,[9] and Boeing reported a return to profitability in Q2 that prevented 10,000 layoffs.[10]

Inclusive Travel and Recreation: The focus on social justice and racial equity has an important impact on the ways that people travel and the types of travel opportunities that are of most interest to travelers. For travelers facing structural inequalities, safety is a key part of their travel needs. Examples of safety-focused strategies include providing vacation rentals for Black travelers that are vetted and recommended by other Black travelers, or LGBTQ+ tours and other cultural history tours to signal to visitors that they are in a safe space.[11] In addition, travel organizations need to reflect the diversity of the United States at all organizational levels.[12] A survey released earlier this year by the consulting firm MMGY Global found that Black travelers, particularly those in the United States, Canada, Britain, and Ireland, are interested in how destinations and travel service providers approach diversity and have indicated that it has an influence on their travel decision-making.[13]

Travel Boycotts: The growing partisan political divide in the United States has Americans increasingly turning to boycotts to make their displeasure known to organizations.[14] Destinations have also been impacted by these boycotts as state and local governments have passed controversial laws that have gained national attention. Both Democrat and Republican leaning destinations have been targeted by these boycotts, from Republican groups calling for a boycott of sanctuary states and cities,[15] to Democrats calling for a boycott of states such as North Carolina, Arizona, and Texas for passing laws aimed at LGBTQ+, immigrants, or other minorities. These boycotts can have a significant impact both on the brand of the destination as well as visitation and loss of business and tax revenues.[16] These boycotts are likely to continue with California recently banning state funded travel to five new states over LGBTQ+ laws in those states. Overall, state-funded travel to 17 states has been banned by California.

COVID-19 Variants and Resurgence: While the tourism industry continues to show signs of a strong recovery, COVID-19 variants and resurgence are starting to change travelers' attitudes on perceived safety and likelihood of travel. Weekly surveys of travelers show that the percentage of travelers who say that coronavirus will impact their travel decisions in the next six months is increasing,[18] and the percent of travelers who expect the severity of the coronavirus situation to get better in the next month decreased from 68% in June to 32% in July 2021.[19]

Domestic Demand Will Dominate: Domestic travel is expected to recover one to two years earlier than international outbound travel. Safety and public health concerns around air travel and traditional lodging will most likely push travel demand toward destinations accessible by transportation substitutions (cars, trains, short-haul flights) and into vacation rentals and visiting friends and relatives (VFR). Creating attractive, differentiated domestic offerings that align with these trends will deliver the highest impact to an individual destination's recovery, though care will need to be taken to ensure these changing trends do not negatively impact local residents.[20]

Domestic Business Travel: Domestic business travel has not enjoyed the same resurgence as domestic leisure travel, with U.S. Travel Association and Tourism Economics predicting that it will reach only 43% of 2019 figures in 2021, not fully recovering until 2024.[21] Group travel, as a portion of the business travel category, is expected to recover at a slower pace than general business travel, owing to restrictions on group gatherings that are still in place or in some areas even increasing due to the resurgence of COVID-19 infections propelled by the Delta variant. Similarly, Deloitte predicts that Q4 of 2021 will see business travel spending return to 25-35% of 2019 levels, possibly reaching as high as 80% by Q4 of next year.[22]

Millennials and Generation Z Gain Purchasing Power: In 2019, Millennials outnumbered Baby Boomers. There are now 75 million Millennials, making up about 40% of America's working population.[23] The combined population of Millennials and Gen Z—those born in the late 1990s to early 2010s—in the US is 166 million, or almost 51% of Americans.[24] The oldest members of Gen Z are entering the workforce and soon these two generations will dominate purchasing power in America. This shift will bring with it new expectations, many of which are highlighted here. Millennials and Gen Z are more racially and ethnically diverse, more likely to have a college degree, and more familiar and comfortable with technology. Destinations must rethink how they attract and engage with these groups.

Soulful/Responsible Travel: Tied to the growth and influence of Millennial and Gen Z travel, travelers are growing more interested in soulful, authentic, and sustainable travel options. They are more conscious of how they travel, where they travel, the impacts they have, and experiences they take with them. A visitor's choice to travel can hinge on the sustainability of a hotel, authenticity of a destination, or potential adverse environmental impacts of the trip.[25]

Supply Travel Trends

Service-Industry Workforce Shortages: In destinations across America, tourism industry employers are struggling to fill entry-level roles.[26] This labor shortage has alternately been blamed on overly generous unemployment benefits, employers' unwillingness to meet higher wage expectations, lack of childcare options, ongoing health concerns related to COVID-19, and shifting values and ideas about work that have flourished during the pandemic. In some cases, local housing prices have risen to the point where there simply are not affordable housing options for service industry workers, and the commute radius is not large enough to encompass nearby lower-cost housing areas.

In response, some restaurants have reduced the hours or the number of days they are open, and hotels have reduced the number of rooms they make available. In the case of hotels, some are making up the difference via a higher daily rate, but that may not be sustainable over time and may alter the value equation for the destination. Additionally, for many tourism-oriented businesses and destinations, short-staffing may create conditions that erode brand equity, as visitor experiences are negatively impacted.

Restaurant Sector Recovery: The U.S. restaurant industry lost $240 billion in 2020 and more than 110,000 businesses were closed temporarily or permanently.[27] Many restaurants that closed were locally owned, not backed by a large chain or holding group balance sheets. This has shifted the brand, culture, and experience of many destinations, while eroding authentic experiences. Preservation of authentic local options and innovative services like creative outdoor experiences will be a competitive advantage among travel destinations.

As the Delta variant surges and as mask mandates and other restrictions are rolled out, the restaurant recovery has hit a speedbump.[28] Meanwhile, staffing shortages make it challenging for many restaurants to operate at full capacity and slow or limited service may lead to brand erosion risks.

Inconsistency of Travel Experience: Shifting guidelines on health and safety protocols, such as masks, indoor attendance caps, proof of vaccination, and testing requirements are creating confusion for travelers. COVID-19 recovery has been uneven and dynamic, with communities facing structural oppression particularly impacted. To address this issue, some travel operators, airlines, and hotels are developing coalitions and alliances to share information and resources. Confusing regulations and the unevenness of rules and requirements have had a detrimental effect on business travel in particular.[29]

Easy Pay Options: Improved digital tools and user fluency with mobile purchasing options have increased the use of cashless, digital, and easy pay options. On many popular travel booking sites there are options for "buy now, pay later," enabling visitors to book trips and pay them off over time.[30] These point-of-sale loans from companies like Klarna, Afterpay, Affirm, and Uplift all offer 'buy now, pay later' options for certain travel partners. Affirm has partnerships with Delta Vacations, Priceline, StubHub, and Alternative Airlines, a flight booking website. Uplift is exclusively focused on providing point-of-sale loans for travel, with around 200 travel partners, including United Airlines, Kayak, Southwest Airlines, and Royal Caribbean.[31]

Threats to Natural Assets: Visitation to national parks and other outdoor attractions saw a huge increase during 2020 and 2021 as travelers looked for destinations that enabled adherence to community health and safety guidelines in their pursuit of recreation and an alternative to sheltering at home. The exponential growth has disproportionately affected popular outdoor sites. "We can accidentally love our parks to death," Sen. Angus King of Maine, chair of the Senate Subcommittee on National Parks, said at a congressional hearing on overcrowding at national parks.[32] Visitation trends at 423 National Park Service sites varies greatly. As stated by NPS, "About half of all our recreation visits are occurring at only the top 23 most-visited parks, with significant congestion conditions concentrated in the most popular 12 to 15 destination parks."[33] Destinations are also hearing from their local communities that the increase in visitors creates overcrowding and degradation to the natural environment.[34] Some natural sites are utilizing reservation systems and attendance limits to reduce the impact to parks and natural spaces.

Rental car shortages: The lack of available rental cars is driven in part by low inventory and by disruptions in the vehicle supply chain. Rental car agencies sold huge portions of their fleets during the pandemic and operators have had difficulty building back their inventory to meet the increasing demand from travelers. Car agencies are also experiencing a shortage of semiconductors that are necessary in car production.[35] This shortage has caused a significant uptick in rental fees. Prices are up 95% compared to the beginning of the year.[36] Rental agencies and travelers have used inventive solutions to address the shortage. Car companies are utilizing options like used car auctions to secure vehicles, while travelers are looking to rideshare, car-sharing, and alternative transportation options.[37]

Alternative transportation trends: The lack of available rental cars and the trend toward more sustainable travel are two trends motivating an interest in alternative transportation options.[38] Popular destinations like Hawaii have implemented informational campaigns informing visitors about available transportation options. GetAroundKauai.com was created with the goal of connecting travelers to transportation alternatives such as airport shuttles, rideshare, car sharing, and bike rentals.[39] Given the rise in cost and lack of availability in the rental car market, travelers are increasingly looking to different modes of travel within destinations. According to recent data from research firm Rakuten Intelligence, U.S. rideshare costs for June were up 53% compared with pre-pandemic times in January 2020.[40] Some destinations are investing in their own transportation alternatives such as shuttles, bike rentals, and chauffeured car services.[41]

Iowa’s Tourism Economy

Tourism plays a large role in Iowa's economy. The tourism industry is the 8th largest employer in the state despite the impact of the pandemic on the economy, with 3.4% of jobs in the state directly supported by the tourism industry.

Figure 4 – Economic Impact of Tourism 2020

Source: Tourism Economics, Economic Impact of Visitors in Iowa 2020

$ 4.6B
Direct Visitor Spend

41,655
Total Direct Jobs Supported

$ 864M
State and Local Taxes Generated

$1.1B
Direct Personal Income

Like many destinations throughout the United States, Iowa has experienced heavy losses due to the decline in Travel in 2020 caused by the COVID-19 global pandemic. Iowa saw year over year growth in visitor spending prior to the pandemic, but not surprisingly, visitor spend dropped in 2020 (Figure 5 – Annual Direct Visitor Spend). Like the rest of the United States, Iowa was showing positive signs of recovery in early 2021, but with the emergence of the Delta variant, visitor spending dropped again in August. It is showing positive momentum again in beginning in September (Figure 6 – Percent Change in Travel Spending).

Figure 5 – Annual Direct Visitor Spend

Source: Tourism Economics, Economic Impact of Visitors in Iowa 2020

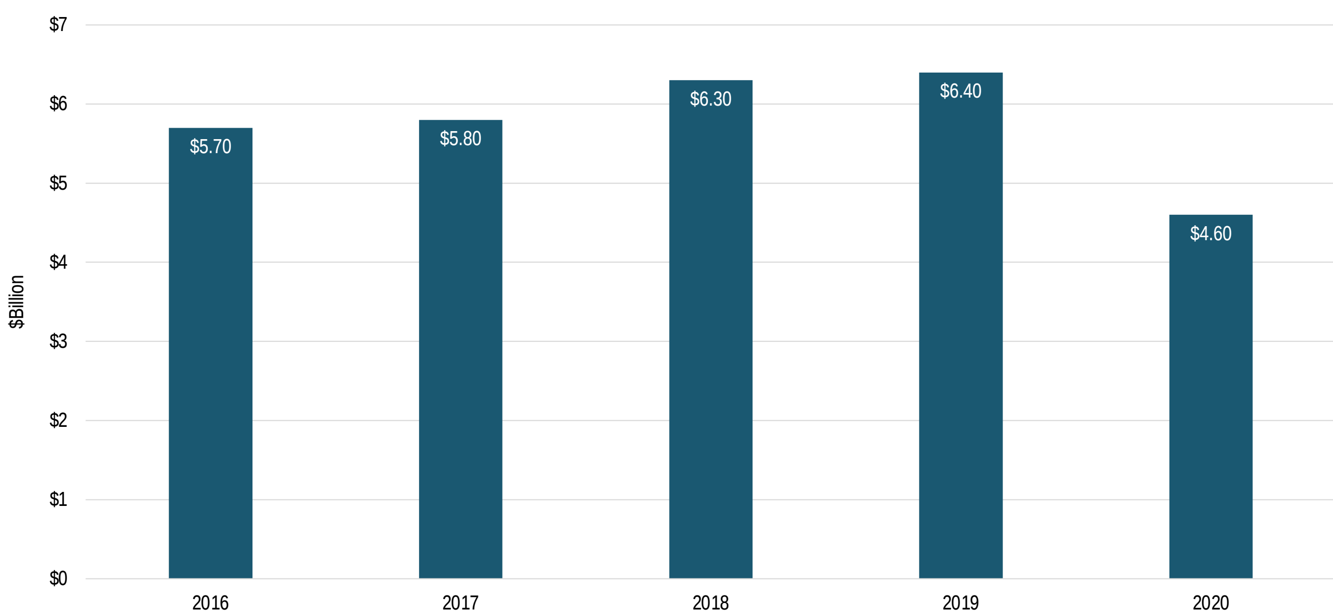
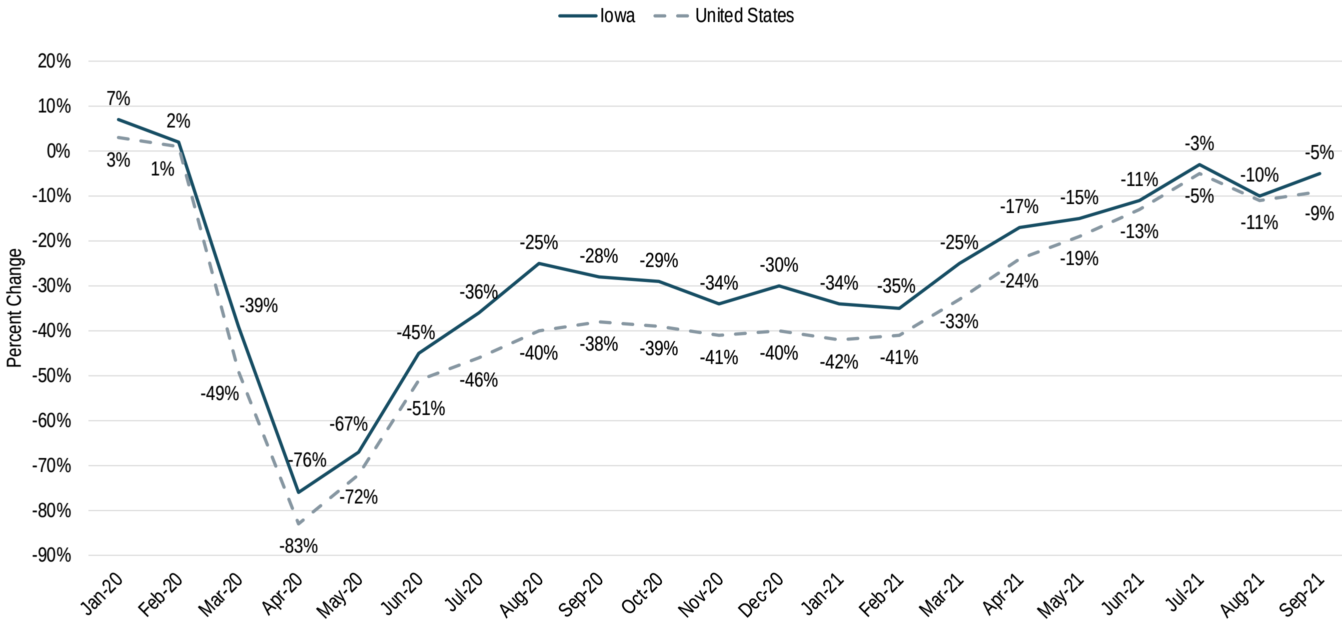


Figure 6 – Percent Change in Travel Spending
Source: U.S. Travel, Travel Recovery Insights Dashboard



The pandemic has had a significant impact on the lodging industry. Spending on lodging alone fell by 39%, leading to a 30% decrease in workforce.[42] Occupancy, average daily rates (ADR), and revenue per available room (RevPAR) all declined significantly as a result of the pandemic. (Figure 7 – Occupancy Rate and Figure 8 – ADR & RevPAR)

Figure 7 – Occupancy Rate
Source: STR

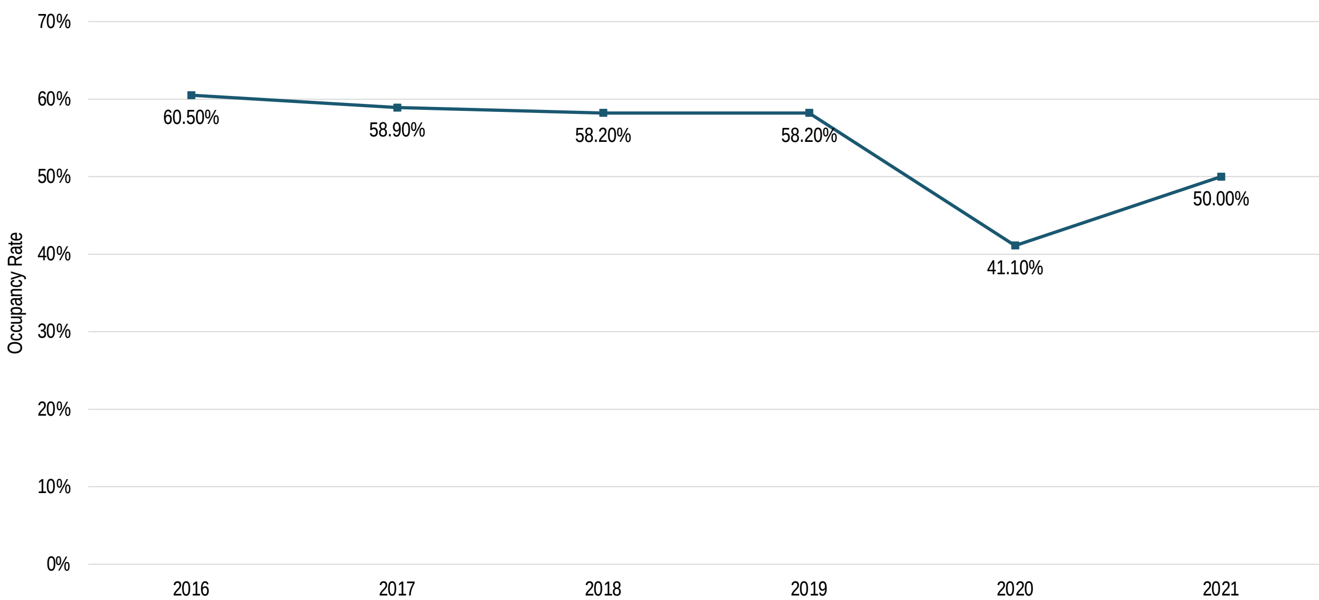
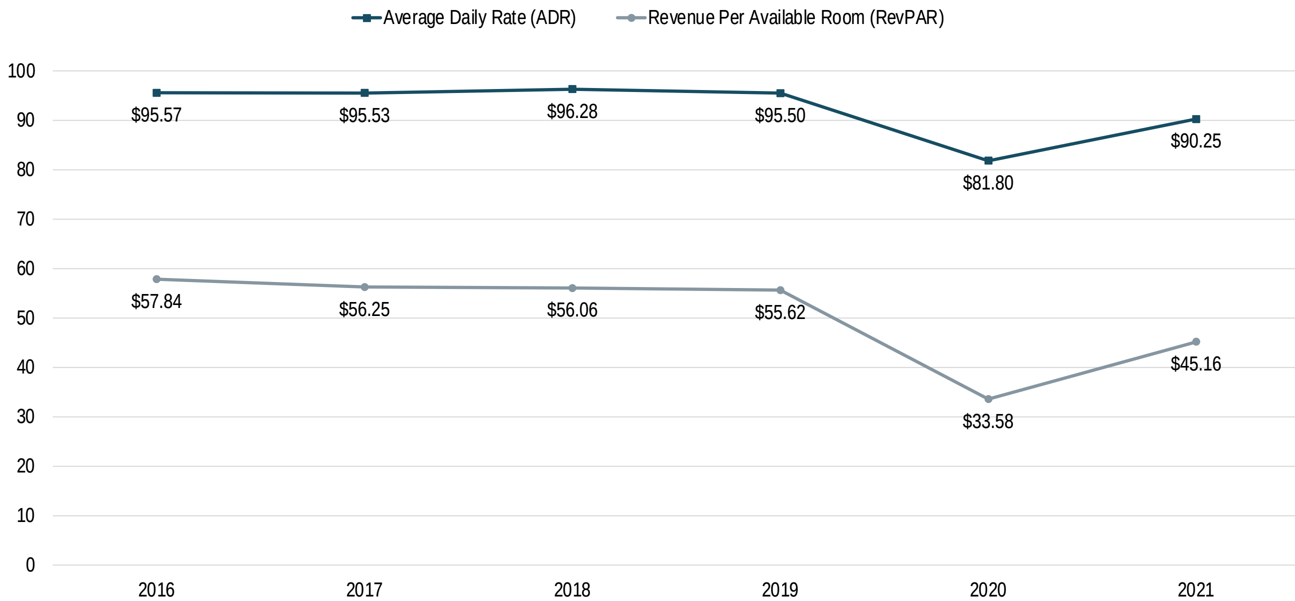


Figure 8 – ADR & RevPAR

Source: STR



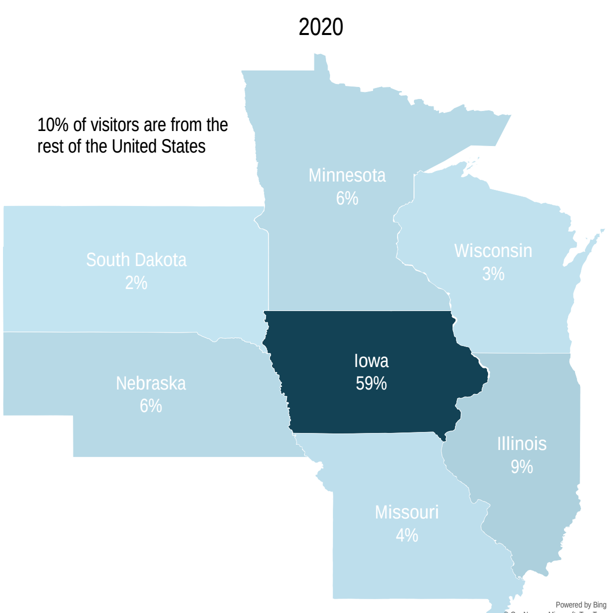
Iowa's Visitor

Iowa's visitors come predominantly from within the state or from a state directly bordering it. In 2020, 59% of Iowa's visitors were Iowans, an increase of 9 percentage points when compared to 2019. In 2020, 31% of visitors were from states bordering Iowa, and 10% were from the rest of the country (Figure 9 – Arrivals by State 2020 vs 2019). Iowa is predominantly a drive-market state with nearly 55% of visitors traveling fewer than 150 miles (Figure 10 – Visitor Distance Traveled).

With 72 state and county parks, Iowa's outdoor and scenic natural assets play a large part in the visitor experience. A 2019 survey conducted by the Iowa Economic Development Authority (IEDA) showed that access to natural landscapes and recreational opportunities were among the top five factors influencing a person's decision to move to a new location.[43] Furthermore, Iowa provides great experiences throughout the year: visitors tend to visit the state regardless of the season, with only a slight drop in visitation in the winter (Figure 11 – Visitation seasonality).

Figure 9 – Arrivals by State 2020 vs 2019

Source: Arrivalist, 2020 Iowa Arrivals



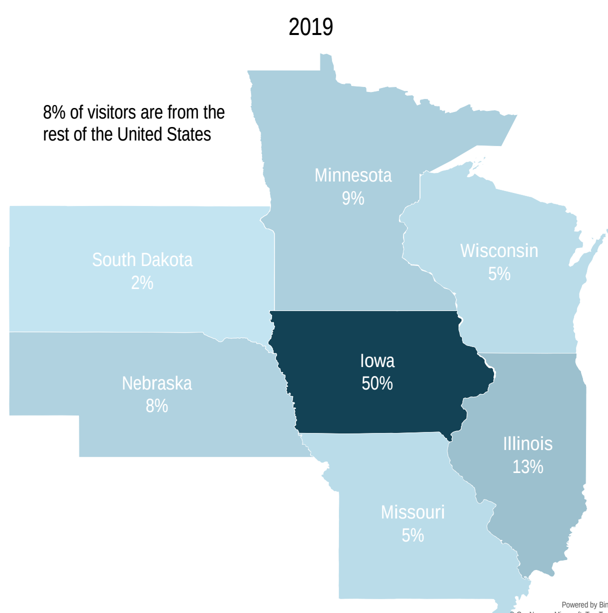


Figure 10 – Visitor Distance Traveled
Source: Arrivalist, 2020 Iowa Arrivals

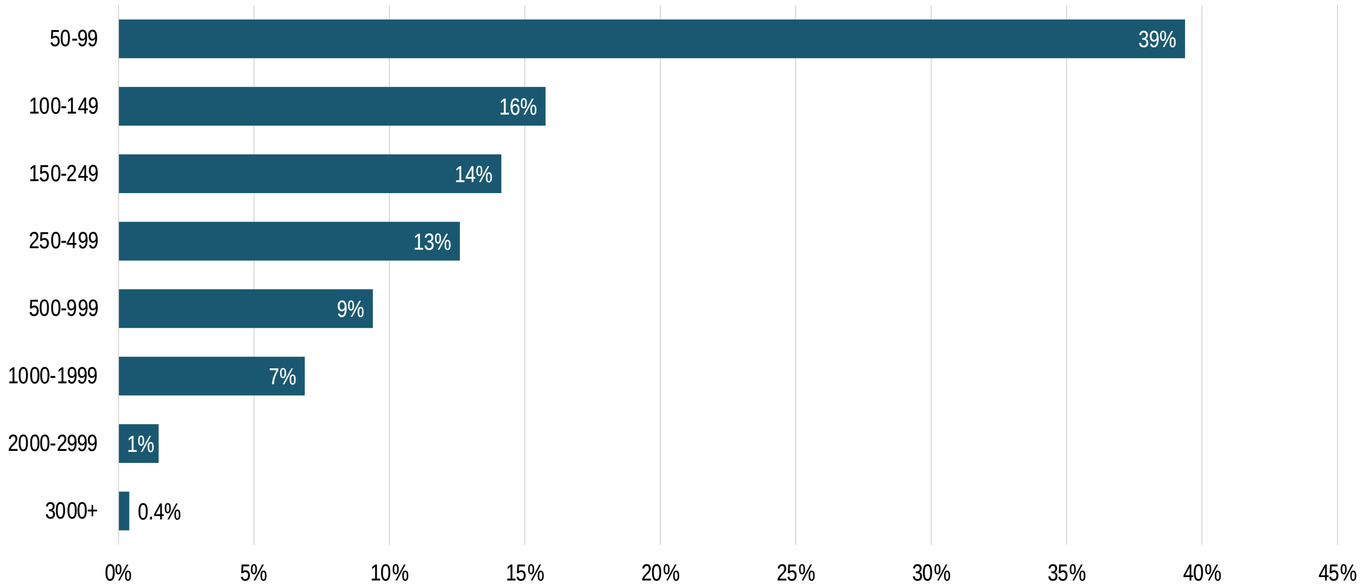
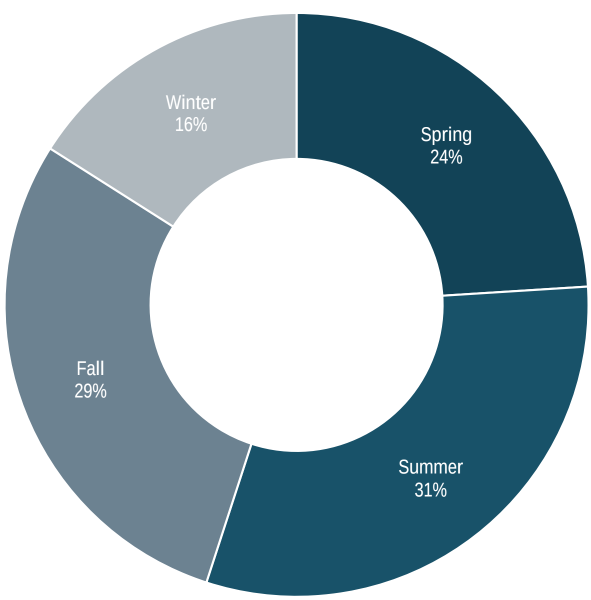


Figure 11 – Visitation Seasonality
Source: Arrivalist, 2020 Iowa Arrivals



Visitor Profile

Iowa's visitors overall are older, mostly white, have high incomes, and are likely to have a college degree.

Figure 12 – Visitor Profile
Source: Iowa Tourism Office Welcome Center Survey Report

54.2
Average Age

2.6
Average Party Size

81%
White

$401.31
Average Daily Spending per Travel Party

62%
College Degree or Higher

3.4
Average Number of days in Iowa

74%
Income of 50k or Higher

Strategic Themes

The key themes of this report represent issues and opportunities identified by industry stakeholders and are considered strategically significant in Coraggio's analysis.

1. Improved alignment between industry leaders and state and local officials can enhance the competitiveness of Iowa's tourism industry.
2. Iowa's tourism industry is currently fractured.
3. Stakeholders want ITO to lead statewide tourism efforts but are concerned about their lack of resources and support infrastructure.
4. Increased and stable funding is needed to drive growth of the industry.
5. Development of tourism offerings and infrastructure is needed to improve access and experience.
6. Iowa needs a unified brand and enhanced industry marketing to elevate the state's competitive position.
7. Tourism growth requires strategies that ensure diverse communities (race/ethnicity, gender, sexual orientation, disability, etc.) feel welcome.
8. Tourism industry programs are underutilized, lack broad awareness, and fail to articulate measurable impact and value.

Theme One

Improved alignment between industry leaders and state and local officials will further enhance the competitiveness of Iowa's tourism industry.

Insights

1. Forty-four percent of survey respondents indicated that the most important impact of the tourism industry on Iowa's overall economic health is attracting outside money to the state through an increase in business revenues and taxes. (Figure 13 – Economic Impact Importance)
2. The tourism industry was one of the hardest hit by the pandemic. While the industry saw a 29% drop in visitor spending, it still contributed 4.6 billion dollars in direct economic activity, generating $864 million in state and local taxes. (Figure 14 – Annual Direct Visitor Spend)
3. Survey respondents believe the tourism industry has the potential to play a bigger role in Iowa's economy and an increase in visitor spending will result in more support for local businesses, increased funding for community services, and generally benefits residents. (Figure 15 – Tourism Opinions)
4. Stakeholders believe that significant tourism growth is attainable, but will require a focus on pro-tourism industry policies and enhanced support from government leaders to improve the competitiveness of Iowa as a destination.
5. Survey respondents rated pro-tourism policies and regulations, government/elected official support, and tourism funding as less than satisfactory. (Figure 16 – Tourism Supports and Enablers)

Implications

1. External investment in Iowa is critical to expanding the state's economic pie. Tourism's ability to attract spending from outside the state has the potential to help drive broader long-term economic growth.
2. For government leaders to invest limited resources to enhance and promote tourism, industry leaders will need to clearly communicate the sector's economic impact and return on investment.
3. Improved alignment between industry leaders and state and local officials has the potential to significantly increase visitation and visitor spend to the state, resulting in increased tax revenue and lower taxes for residents.

Figure 13 – Economic Impact Importance   N=530

What is the most important impact tourism has on Iowa's overall economic health?

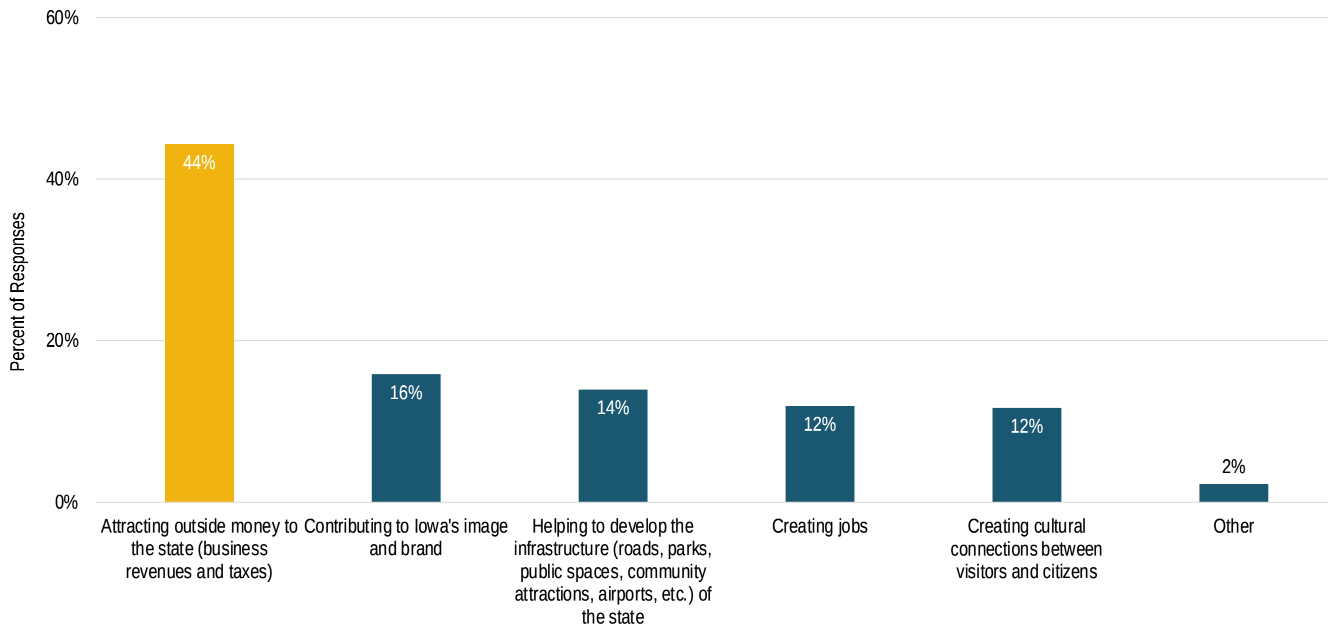


Figure 14 – Annual Direct Visitor Spend

Source: Tourism Economics, Economic Impact of Visitors in Iowa 2020

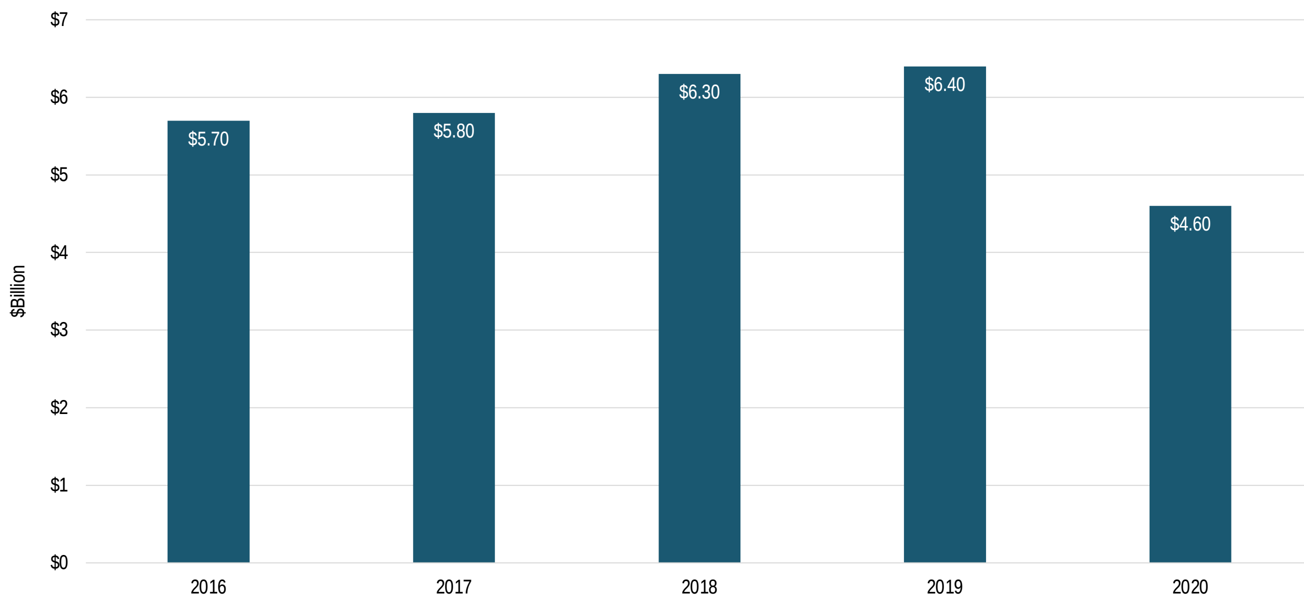


Figure 15 – Tourism Opinions   N=536

Please select your level of agreement with each statement:

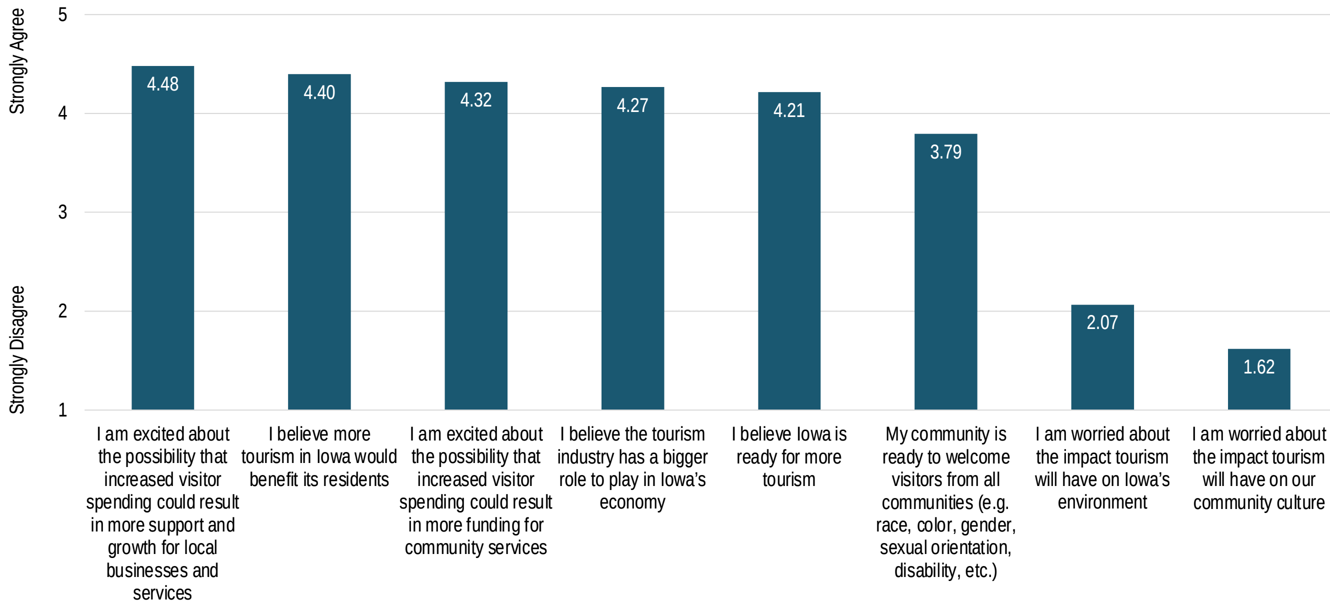
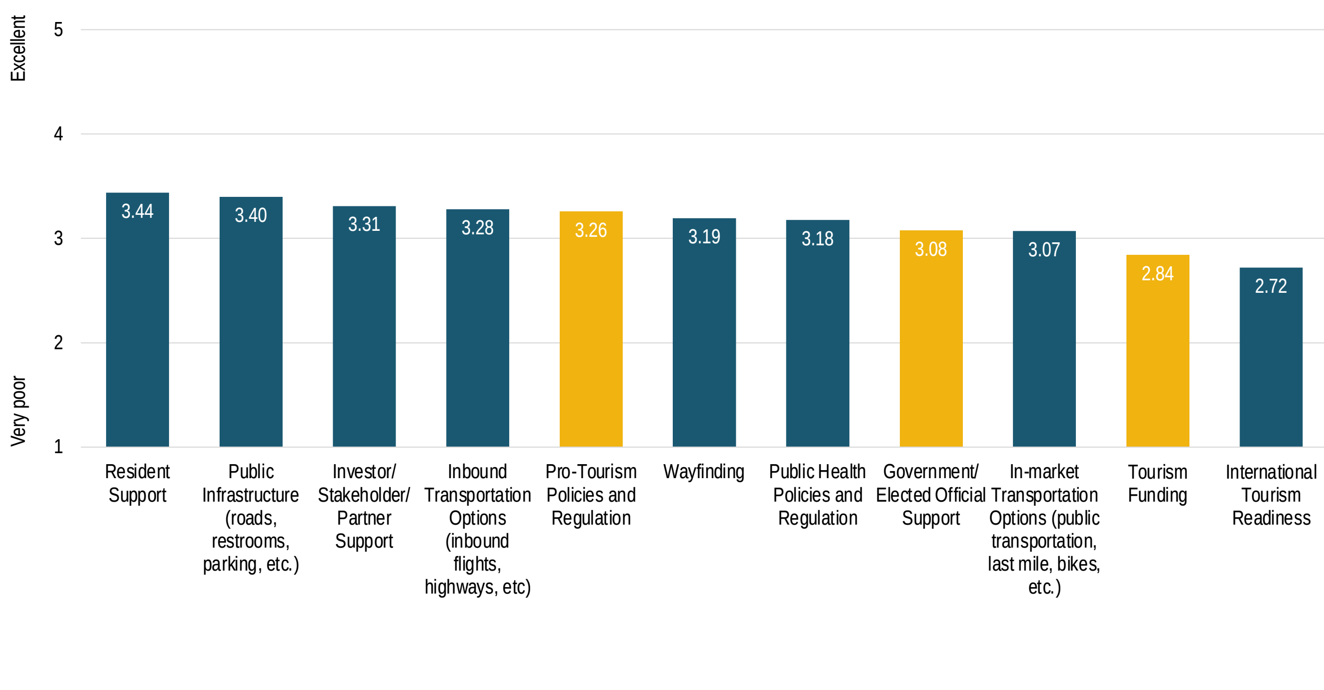


Figure 16 – Tourism Supports and Enablers   N=515

Please rate your perception of the quality of each area of Iowa's tourism support structure:



What We Heard

"Iowa tourism is what grows my business. Countless businesses and towns rely on tourism."

"How can we better portray the value of the investment?"

"It's not just about the [more] money – it should be about spreading awareness of the value, the priority, the vision for what we're trying to accomplish through tourism."

"I just don't know if tourism is not the first thing that pops into [our leaders'] minds"

"I don't think people see tourism as economic development. I think we need to get across the impact of tourism."

"I don't think people think about tourism as an economic development tool."

"Most leaders don't see Iowa as a tourism state. That is false, we can attract people here."

"Tourism has to demonstrate to funders the impact of those resources and the type of dollars generated. They try, but if the numbers come from the state agency to the state government, it is not as believable is if you have the private industry involved."

"We need to step back and collaborate and work together to advocate for tourism."

"Tourism never ranks up there with economic development. We are a generator of revenue. $9.2B industry."

"We need to educate our partners, policy-makers, decision-makers. Need to better educate on the role/impact/importance of tourism."

"There is an opportunity to make a better link between tourism and economic development. Connect to jobs, economic growth, other Economic Development priorities."

"Need to get decision-makers to believe and understand that tourism is a huge economic engine. Need to be able to show the ROI and the professionalism and competency of the industry."

Theme Two

Iowa's tourism industry is currently fractured.

Insights

1. Survey Respondents believe that engaging and coordinating with stakeholders is important to the success of Iowa as a destination, but there are opportunities for ITO to be more effective in this role. (Figure 17 – Destination Marketing Roles)
2. A lower rating was given for the perceived support of the tourism industry by stakeholders/partners. (Figure 18 – Tourism Supports and Enablers)
3. Stakeholders consistently identified three reasons why the industry is perceived to be fractured:
   - The potential negative industry impacts of two statewide organizations (ITO & ITIP) if there is not a clear delineation of roles and responsibilities and a commitment to collaboration.
   - The divide between rural and urban areas within the industry and the lack of a collaborative mindset, particularly as it relates to securing resources.
   - The current regional structure (western, central, eastern) is territorial and not oriented around the visitor experience. Communities within a region often compete with each other.

Implications

1. Iowa is a nascent visitor destination. If the industry is not collaborative and supportive, there is risk that internal competition will result in a visitor experience that is incomplete or not living up to its full potential.
2. Policymakers and funders are less likely to invest in an industry where there is a lack of collaboration and internal competition compared to one that is cohesive and aligned around shared goals.

Figure 17 – Destination Marketing Roles   N=364

Please rank how important and effective the following destination marketing roles are to you and the success of Iowa as a destination:

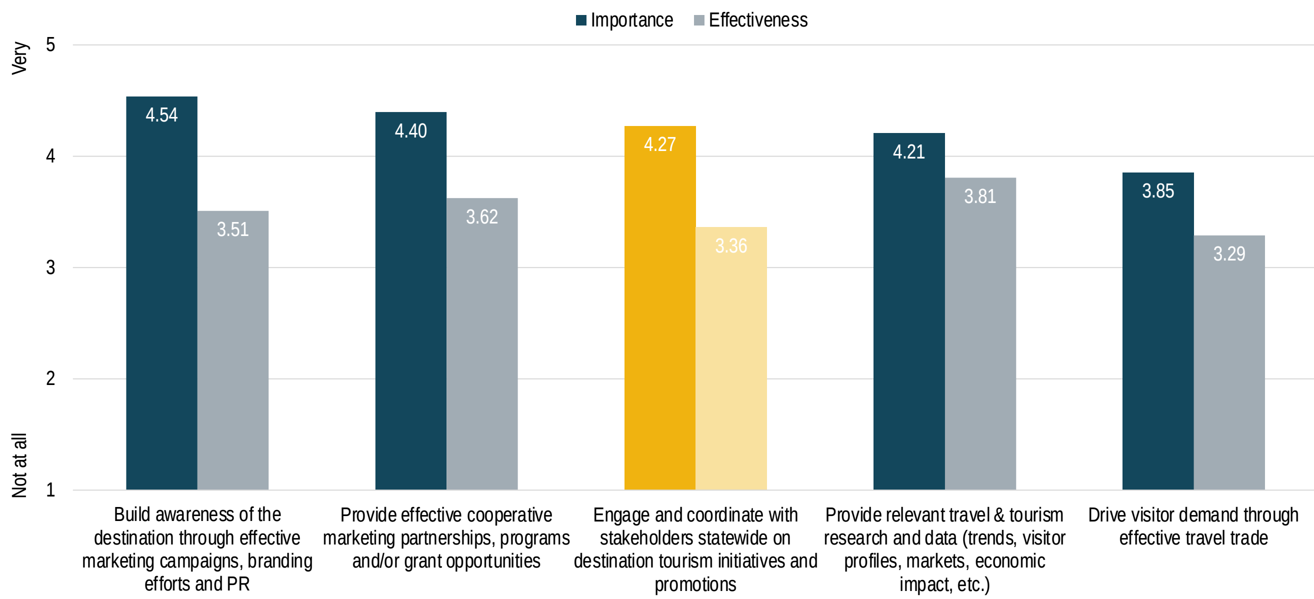
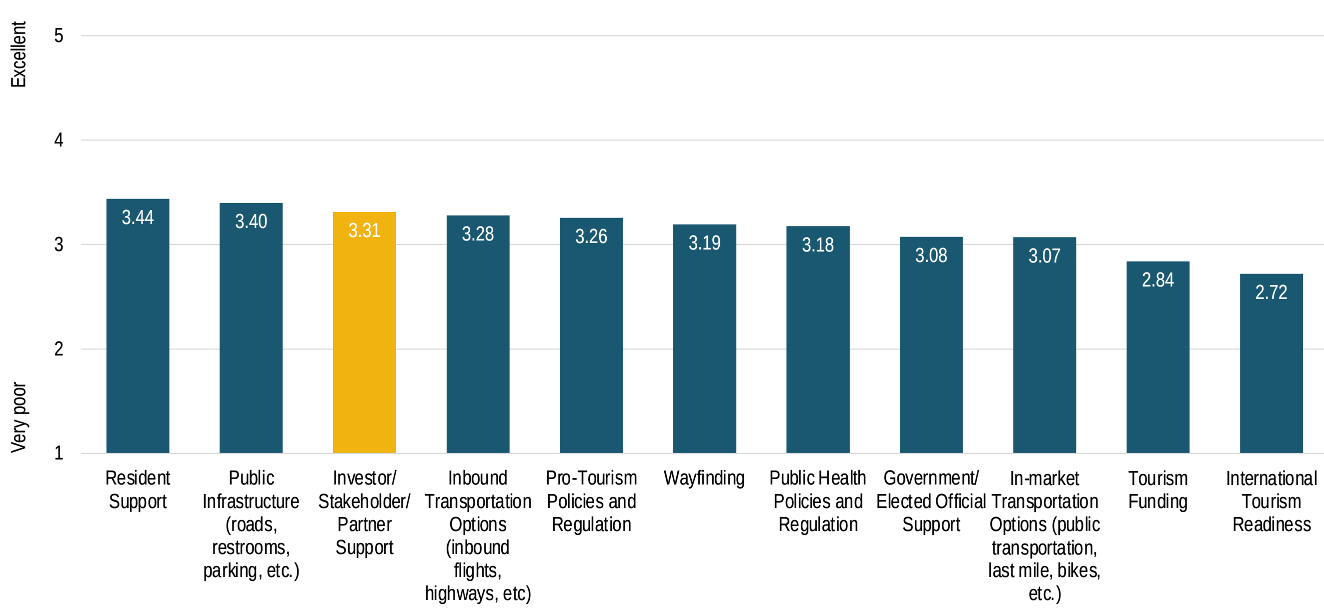


Figure 18 – Tourism Supports and Enablers   N=515

Please rate your perception of the quality of each area of Iowa's tourism support structure:



What We Heard

"The industry is divided"

"ITIP wasn't developed out of anything done that is bad. Meant to build from base that exists today and grow from there."

"We, the industry, can be our own barrier. We want to have the industry sing the same song, but we are very fragmented. We want to see the industry on the same page."

"There are a lot of great organizations in play. Remember that you don't have to be everything to everyone – rely on each other and collaborate to best serve the entire industry."

"Despite everyone's interest, we're still disconnected as state entities/collaborative departments. Need to find a way for us to reconnect in a way that is truly supporting everything going on across the state."

"We need more strategic partnerships and collaboration."

"We seem to be fighting against each other. I was surprised to hear of the territorial attitudes within the state."

"There could be more coordination among the entities and local/regional/state."

"Collaboration is going to be important. we need to make it an experience so that when people go to a region, they know what they can do, where can they stay."

"We need regions to work together and collaboratively promote themselves as a unit instead of individually. This will be key."

"We need to use urban areas as magnets and when they come, [promote opportunities] for them go and visit rural areas."

"There are divisions within the tourism industry. Last year certain industry folks actively advocated against tourism funding at the state level because they didn't like where they thought the dollars would go."

"We are definitely not a united industry."

"The insistence of pitting the larger communities and smaller communities against each other doesn't get us anywhere."

"Opportunity for the state to improve the industry, but can't do that under this antiquated regional system."

"We can be more collaborative so we are all working on the same page; without that, we aren't going to be making the progress that we should be making."

"We aren't united across the state in the industry."

"We need to unify the industry, otherwise nothing else will happen."

"Too splintered and fractured. This hinders efforts at the statehouse or at the legislature. Need a shared voice with common goals and objectives."

"Need to address rural vs urban divide. It's not a competition. We all benefit if certain communities are thriving."

"We have three tourism regions – is this effective? Regions currently defined by our interstate system. Would organizing them around some of our natural resources be better?"

"We need to think about orienting our regions by traveler experience."

"I don't think anyone is working together like they should."

"Tourism industry is very fragmented. We don't play well together. We need more coordination and collaboration."

Theme Three

Stakeholders want ITO to lead statewide tourism efforts but are not clear on their current role and are concerned about the lack of resources and support infrastructure.

Insights

1. Stakeholders believe that ITO's purpose is critical and that they are the lead voice for the state's tourism industry. (Figure 19 – Mission)
2. ITO is described as having creative and professional leaders, being innovative and helpful, but also being underfunded and unknown. (Figure 20 – ITO's Reputation)
3. There is not a good understanding of what ITO's primary mission/purpose currently is as it relates to supporting and growing the industry. (Figure 21 - Mission)
4. Stakeholders believe ITO's primary roles should be to help build brand awareness for the destination and market Iowa to out-of-state visitors, but opportunities exist to improve their current effectiveness in these areas. (Figure 22 – Destination Marketing Roles & Figure 23 - Programs)
5. Stakeholders believe other important roles could include:
   - Convening stakeholders and incentivizing industry collaboration (Figure 24 – Destination Marketing Roles)
   - Collecting data and analyzing trends to support evidence-based decision-making (Figure 24 – Destination Marketing Roles)
   - Facilitating the development of tourism products (Figure 25 – Destination Management Roles)
   - Industry advocacy as it relates to policy issues (Figure 25 – Destination Management Roles)
   - Providing or organizing industry education and training (Figure 25 – Destination Management Roles).
6. Industry stakeholders indicated that ITO's small number of staff, its lack of a formal board or commission, and small budget hinder their ability to fully lead state tourism efforts.

Implications

1. ITOs lack of a clearly defined, or understood, role could result in the industry suffering from a lack of direction and focus, particularly as it relates to marketing and branding the state.
2. Resources and access to decision-makers are critical to ITO's efforts to fully take on the leadership and programmatic role desired by the industry.

Figure 19 – Mission N=428

Please select your level of agreement with each statement:

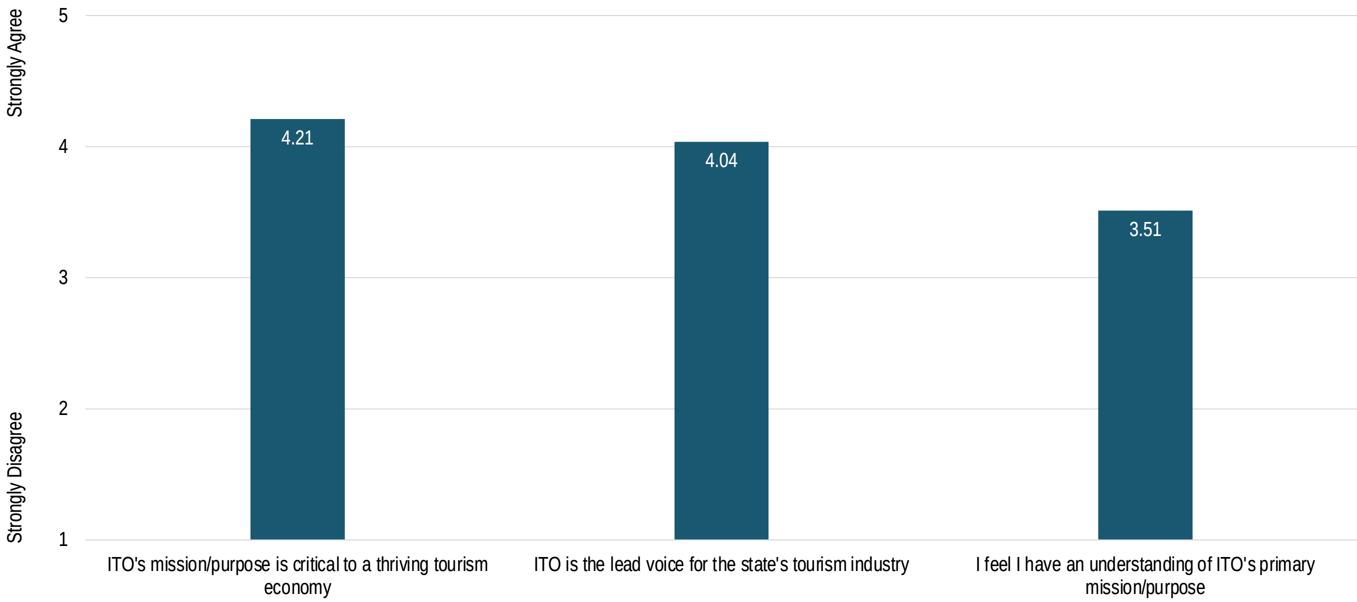


Figure 20 – ITO's Reputation N=297

What three words do you believe best describe ITO's reputation in the state?

Figure 21 – Mission   N=428

Please select your level of agreement with each statement:

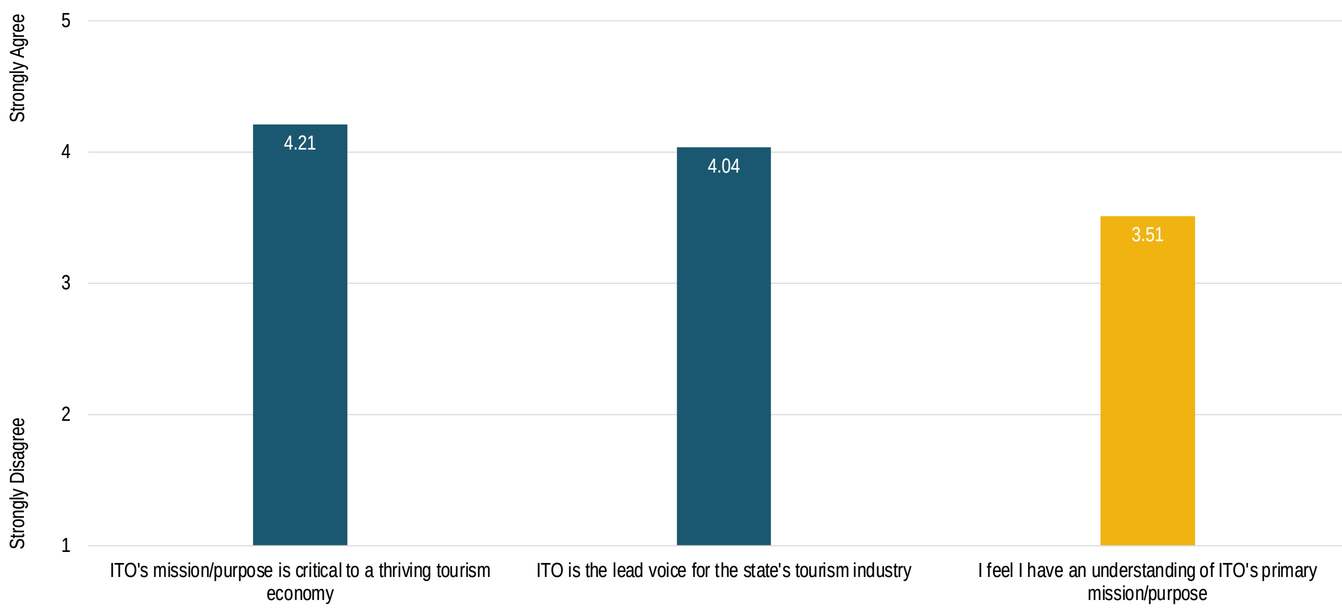


Figure 22– Destination Marketing Roles   N=364

Please rank how important and effective the following destination marketing roles are to you and the success of Iowa as a destination:

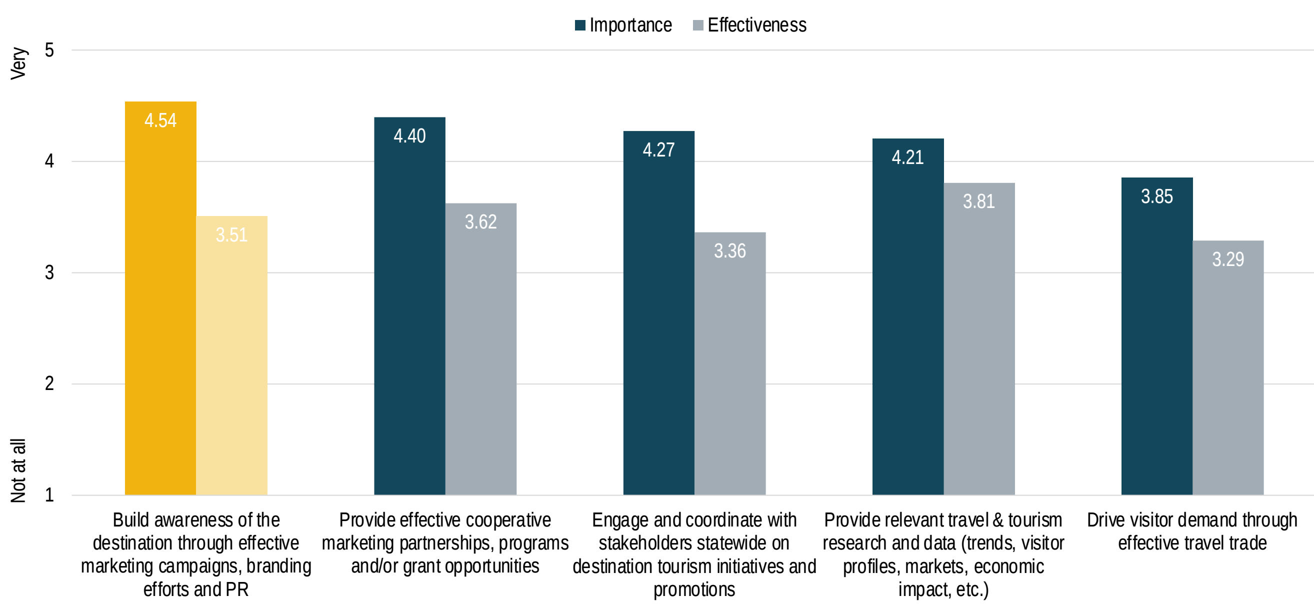


Figure 23 – Programs   N=346

Thinking about the Iowa Tourism Office's programs, how would you rate the importance and effectiveness of the following:

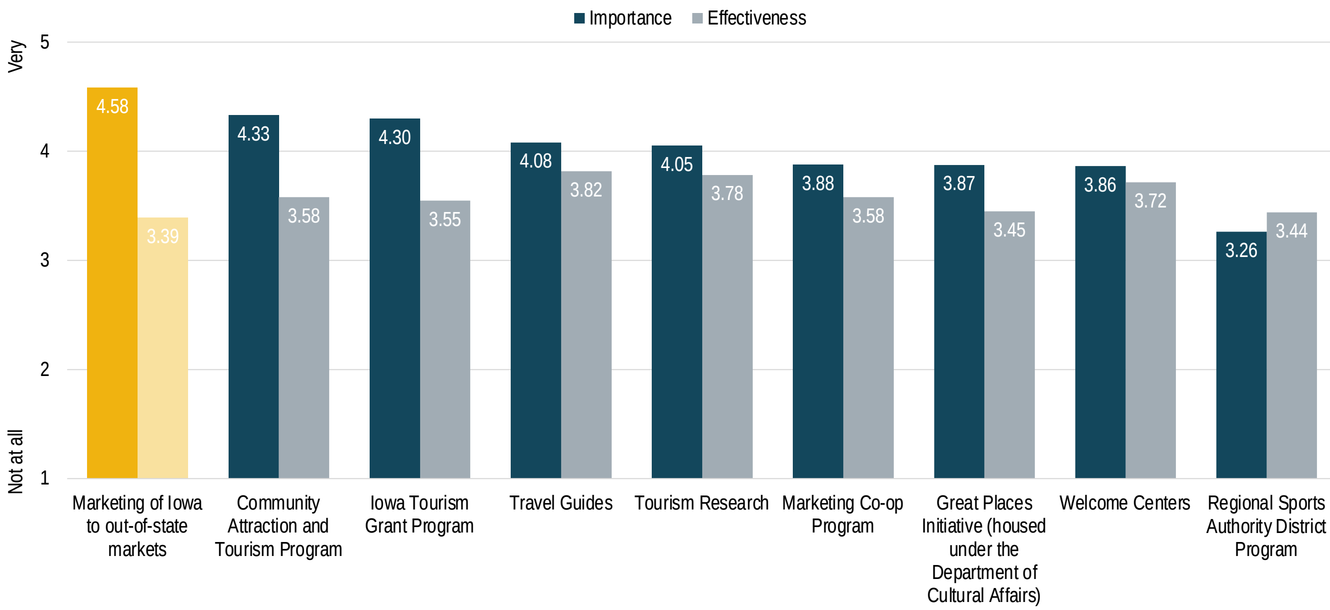


Figure 24 – Destination Marketing Roles   N=364

Please rank how important and effective the following destination marketing roles are to you and the success of Iowa as a destination:

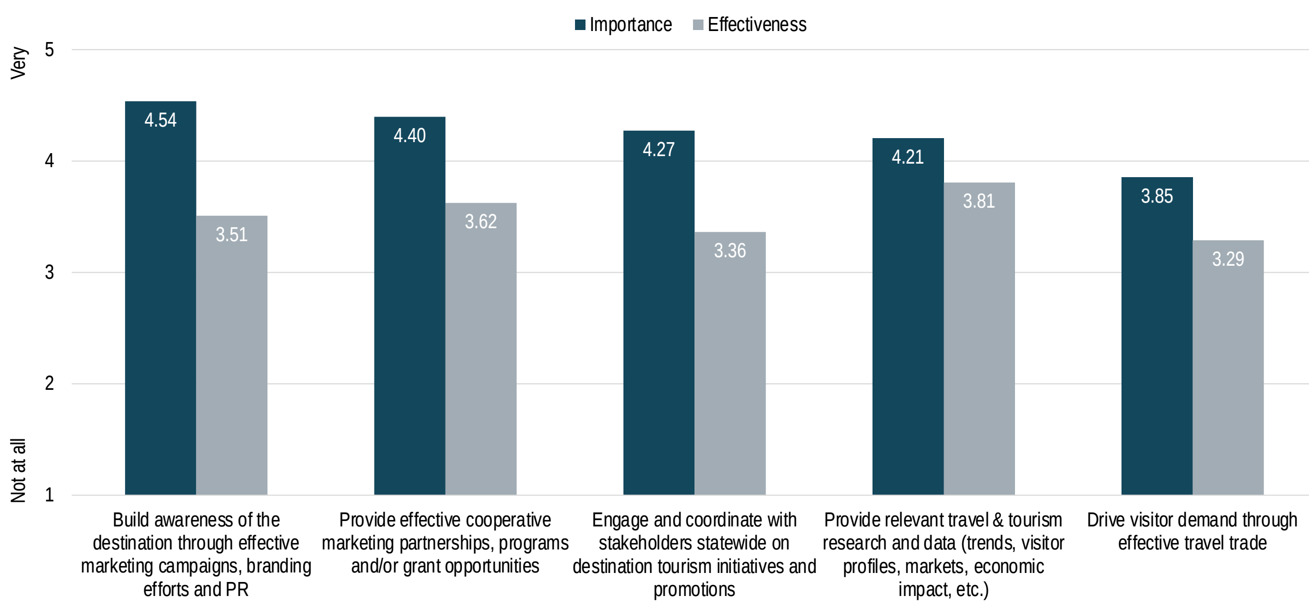
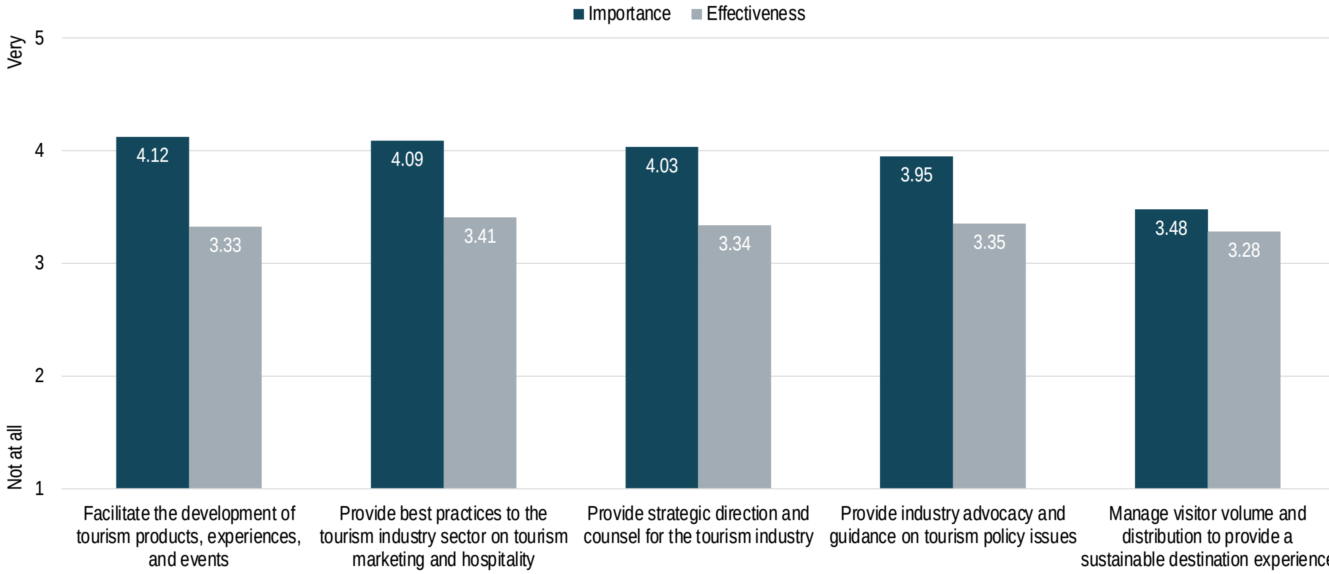


Figure 25 – Destination Management Roles N=343

Please rank how important and effective the following destination management roles are to you and the success of Iowa as a destination.



What We Heard

"ITO doesn't have enough money to even advertise some of the great things we do have."

"Travel Iowa has the ability to unify us and to ask us to come and be supportive of them, but I have never gotten an ask."

"Our state tourism office should control the brand for our state"

"I think our state tourism office does an excellent job of finding creative solutions and doing creative activities. They are always doing so much with limited dollars"

"Research is really important for destination partners; statewide data that compares us to a peer set of communities across the state. Their Economic Impact report is used by CVBs to advocate for funding."

"If you were to ask local/state officials, they'd agree it's important to economic growth and community, but there really hasn't been a commitment to fund it. Not much investment for 20+ years."

"ITO is going to need more resources to accomplish this, while doing the best that they can with what they do have."

"State needs to lead and own the brand."

"ITO needs to be the conveners to help industry get along. Someone has to provide that cohesiveness. ITO can be/should be the group to do this."

"Education or toolkits to support the industry as a whole."

"One thing to look at: What do the roles and staff structure look like? What positions are needed, what are their responsibilities, and who is reporting to whom? Not sure if there's anyone on Travel Iowa team that is not Marketing & Communications – is that appropriate for the department?"

"ITO should have a role in creating collaboration."

"They need to do a better job of getting people to understand what ITO does."

"ITO could provide more educational opportunities. A lot of the industry relies on volunteers. So perhaps education on how to manage volunteers. Also guidance on how to market/promote your local destination or service."

"Past year showed they were pretty nimble with changing quickly."

"ITO has professional expertise and we really need that as well; making sure the expertise is connecting with folks out in the community."

"ITO can do a better job of convening and connecting folks within the industry."

"It would be a good focus for the tourism office to focus on the big elephants in the room that are impeding collaboration."

"I think ITO needs to be given a higher priority, it should be elevated in the future, it needs to be a more critical department in the future."

"State tourism is buried within broader Economic Development. Need their own funding line items"

"Establish a direct funding stream and a tourism department."

"The state has defunded tourism in a negative way. Tourism used to be a state department and then it shifted and was downgraded to the point where for a while we didn't have a state tourism director."

"We want to make sure the Iowa Tourism Office is strong enough and in a good enough position to lead the tourism industry."

Increased and stable funding is needed to drive growth of the industry.

Insights

1. Interview and focus group participants consistently identified stable tourism funding as a concern. Perceptions exist that tourism generated taxes do not go back to support tourism. Hotel/motel taxes are collected locally and go toward general funds rather than funding tourism.
2. Survey respondents rated tourism funding as the second lowest among all tourism supports and enablers. (Figure 26 – Tourism Supports and Enablers)
3. Underfunded was a top word used to describe ITO's reputation. (Figure 27 – ITO's Reputation)
4. Seventy-three percent of Program Evaluation survey participants are working with an annual marketing and PR budget of less than $25,000 (3-year average), with 36% under $5,000 per year. (Figure 28 – Marketing and PR Budget)
5. Of the 45 states reporting state tourism budgets, only seven other states had lower tourism budgets than Iowa. (Figure 29 - State Tourism Budgets)
6. Iowa has the 9th smallest advertising and promotion budget, resulting in effectiveness of ITO's programs being rated lower, including marketing of the state. (Figure 30 - Programs)
7. Interview and focus group participants believe lack of collaboration within the industry, as well as a lack of understanding by local and statewide officials on the importance of tourism, its return on investment, and impact on the economy, has stifled funding opportunities. Resident, stakeholder, and elected official support for tourism were rated average by survey respondents. (Figure 31 – Tourism Supports and Enablers)

Implications

1. Current funding levels have the potential to hinder the tourism industry's ability to plan and compete against other destinations. Stable and reliable funding at a competitive level will enable stakeholders to focus on the work of growing tourism, rather than on resource development.
2. Limited resources and a lack of funding can lead industry stakeholders to compete against each other for funding and undermine collaboration.
3. Greater education on the business case for tourism for elected officials and local residents will be needed to gain support for the industry as a whole and to help improve and stabilize funding dedicated to tourism.

Figure 26 – Tourism Supports and Enablers N=515

Please rate your perception of the quality of each area of Iowa's tourism support structure:

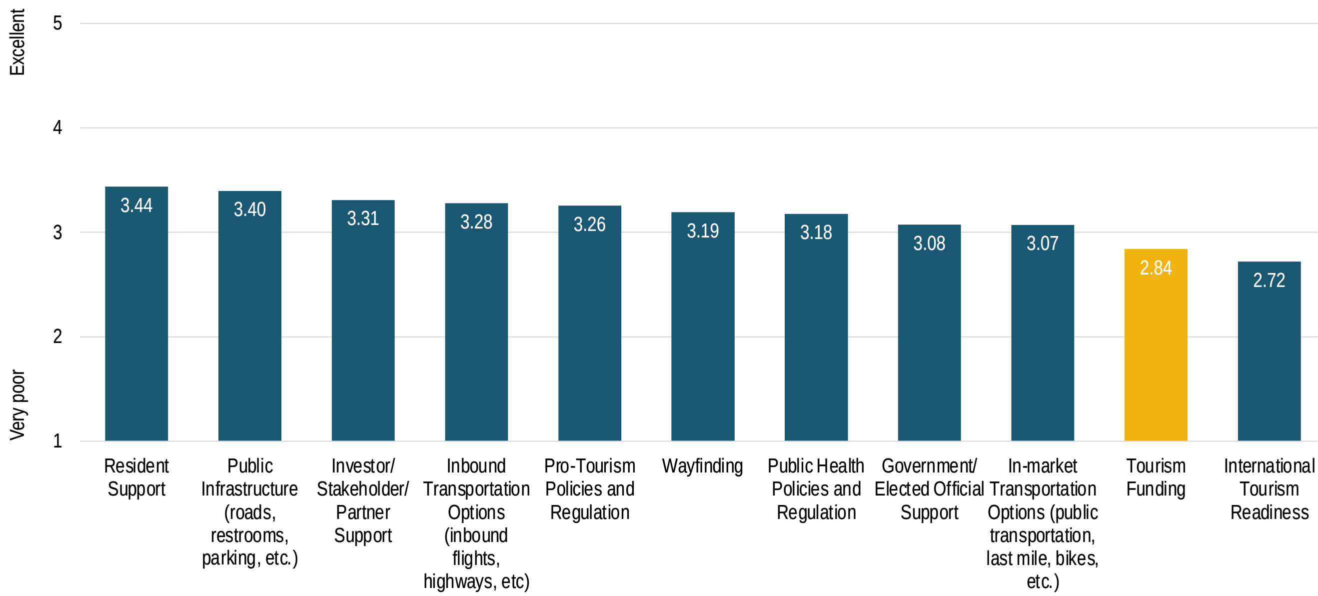


Figure 27 – ITO's Reputation N=297

What three words do you believe best describe ITO's reputation in the state?

Figure 28 – Marketing and PR Budget N=89

Please select the $ range that best reflects your annual Marketing + PR budget *based on 3-year average: FY19, 20, 21:

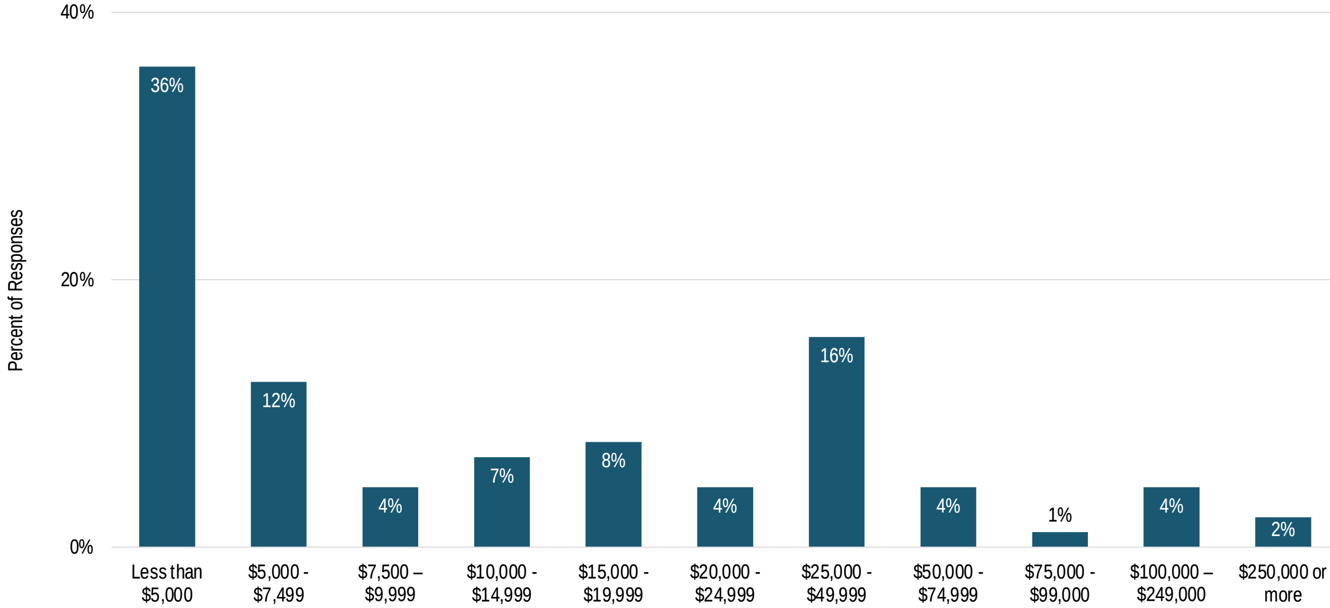


Figure 29 – State Tourism Budgets

Source: US Travel, State Budget by Category 2019-2020

Ranking	State	Total Budget	Public Funding	Private Funding	Total Advertising and Promotion Budget	Domestic Advertising and Promotion Budget	International Advertising and Promotion Budget
30	New Hampshire	9,557,876	9,557,876	0	2,058,956	1,778,329	280,627
31	New Jersey	9,000,000	9,000,000	0	0	0	0
32	Alaska	8,936,000	8,936,000	0	4,626,000	4,371,000	255,000
33	Georgia	7,995,083	7,995,083	0	3,793,500	2,918,500	875,000
34	Idaho	6,286,205	6,286,205	0	4,599,367	4,144,405	454,962
35	Indiana	6,243,487	5,163,109	1,080,378	1,336,335	1,336,335	0
36	Nebraska	5,522,803	5,522,803	0	1,008,652	1,008,652	0
37	North Dakota	4,542,339	4,542,339	0	3,443,173	3,051,033	392,140
38	Iowa	4,436,000	4,036,000	400,000	1,637,000	1,637,000	0
39	Pennsylvania	4,067,000	4,067,000	0	400,554	400,554	0
40	Kansas	3,755,817	3,178,978	576,839	930,089	780,139	149,950
41	Connecticut	3,680,912	3,680,912	0	3,315,052	3,202,552	112,500
42	Mississippi	2,700,000	2,700,000	0	1,775,000	1,550,000	225,000
43	Delaware	2,457,400	2,457,400	0	765,000	765,000	0
44	Washington	1,794,000	1,635,000	159,000	172,000	172,000	0
45	Michigan	0	0	0	3,353,774	3,071,074	282,700

Figure 30 – Programs N=346

Thinking about the Iowa Tourism Office's programs, how would you rate the importance and effectiveness of the following:

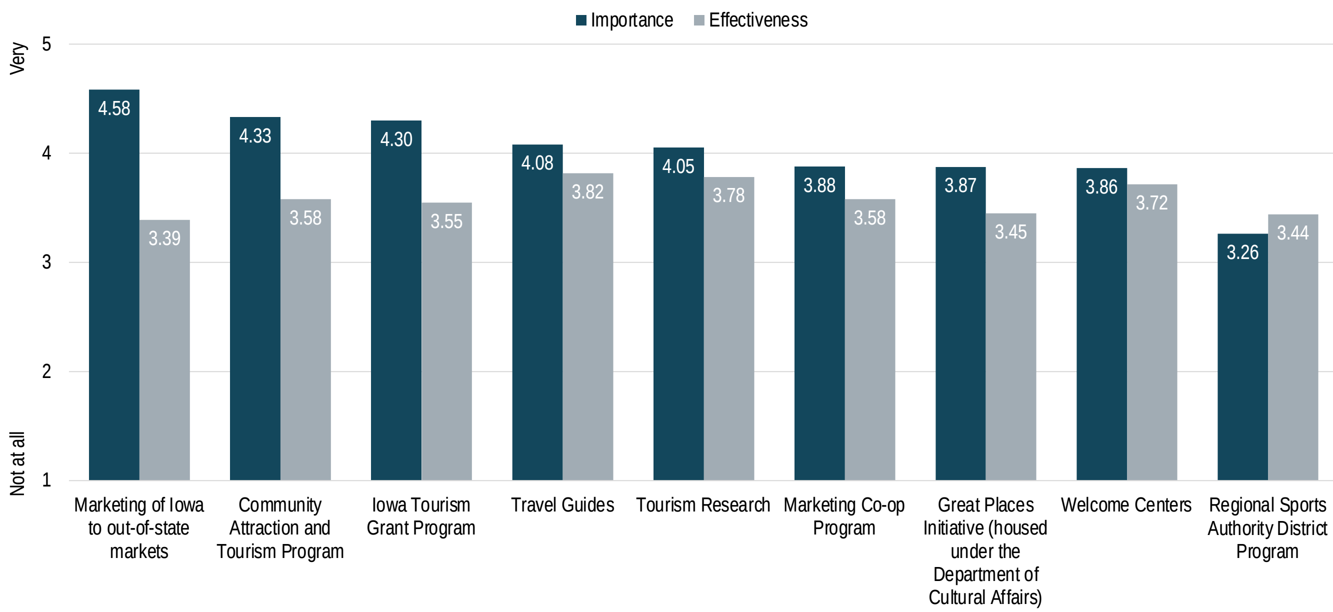
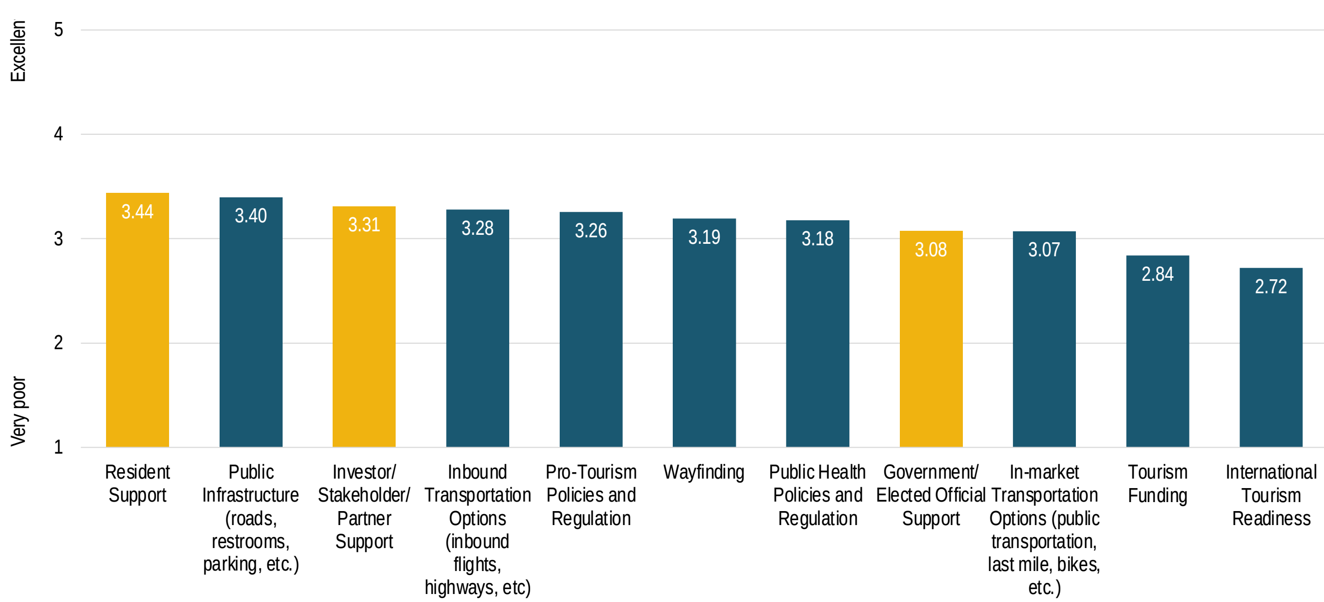


Figure 31 – Tourism Supports and Enablers N=515

Please rate your perception of the quality of each area of Iowa's tourism support structure:



What We Heard

"ITO needs money to get the word out across the country about all the great things here. We have great assets, clean air, no traffic, etc. It is inexpensive."

"I wouldn't have any hotels without IEDA, the tax breaks, the things designed to build infrastructure...they are amazing. If we could get similar money that is dedicated to infrastructure to be matched in advertising, it would be amazing. We have all this industry infrastructure but doesn't matter if no one talks about it."

"Funding. Hard to be successful without funding. Specifically funding for marketing and product development. Make sure we have money out there to keep our attractions updated as well as developing new things."

"The biggest wins I have experienced is when it is a combination of private public partnership. We can't just complain about not getting enough money."

"In terms of investment by the state in arts, culture and tourism I'd guess we must be near the bottom of the 50 states."

"Lack of commitment by those that are in charge of the purse strings."

"Increased funding for travel and tourism promotion, to drive travel – we know their budgets are significantly less than surrounding states."

"We rank toward to the bottom of states in terms of funding for tourism."

"We are ranked 40 something in marketing dollars for promoting our state to surrounding states. Having more dollars available for marketing would be a plus."

"We need new ways to fund it. For example, the licensing of alcohol. The State could take a percentage to fund tourism."

"Being creative in finding different ways to fund tourism. Should be based on different models rather than just the hotel motel tax. Going to the legislature with more creative funding ideas."

"Need to fund the industry accordingly, but government funding won't be enough, so we need to rely on public/private models."

"Funding is huge. When compared to other states Iowa consistently falls on the lower end for tourism funding."

Theme Five

Development of tourism offerings and infrastructure is needed to improve access and experience.

Insights

1. Stakeholders have a very positive perception of Iowa tourism assets and consider many of them to be of high quality. (Figure 32 – Tourism Drivers, Assets, and Experiences)
2. Iowa's outdoor and rural assets are considered a top opportunity for the destination. (Figure 33 – Top Ten Opportunities)
3. However, finding and getting to these assets is considered a challenge. Wayfinding, transportation, and industry infrastructure are considered to be top threats to tourism in the state. (Figure 34 – Top Threats)
4. Many interview and focus group participants identified a need to further develop assets and experiences in Iowa. Survey respondents identified destination development as a top opportunity for the state, and limited product/experience development and poor quality of experiences among top threats. (Figure 35 – Top Threats and Opportunities)
5. Facilitating the development of tourism products, experiences, and events was considered the most important destination management role for ITO. (Figure 36 – Destination Management Roles)
6. Interview and focus group participants believe Iowa has an opportunity to embrace agritourism and would like to see more support through promotion and product development.
7. Interview and focus group participants also identified additional tourism products they believe could be developed to improve visitor experience such as water access, biking, and the broader culinary/farm-to-table and beer scene.
8. Stakeholders consistently referenced Iowa's hidden-gems, unique experiences, destinations, or attractions that have the potential to be further developed or promoted.

Implications

1. Continued marketing of the destination without supporting the infrastructure and development of the destination can lead to poor visitor experience and negatively impact marketing efforts conducted by the tourism industry.
2. Destination development is not something ITO can do by itself and will require a collective impact model that leverages public/private resources. ITO will need to utilize its positive reputation as a leader and create relationships with other organizations and agencies to help establish and strengthen tourism-oriented infrastructure.
3. ITO may need to develop new internal capabilities to facilitate destination development.

Figure 32 – Tourism Drivers, Assets, and Experiences   N=540

please rate your perception of the quality of each area of Iowa's tourism offering:

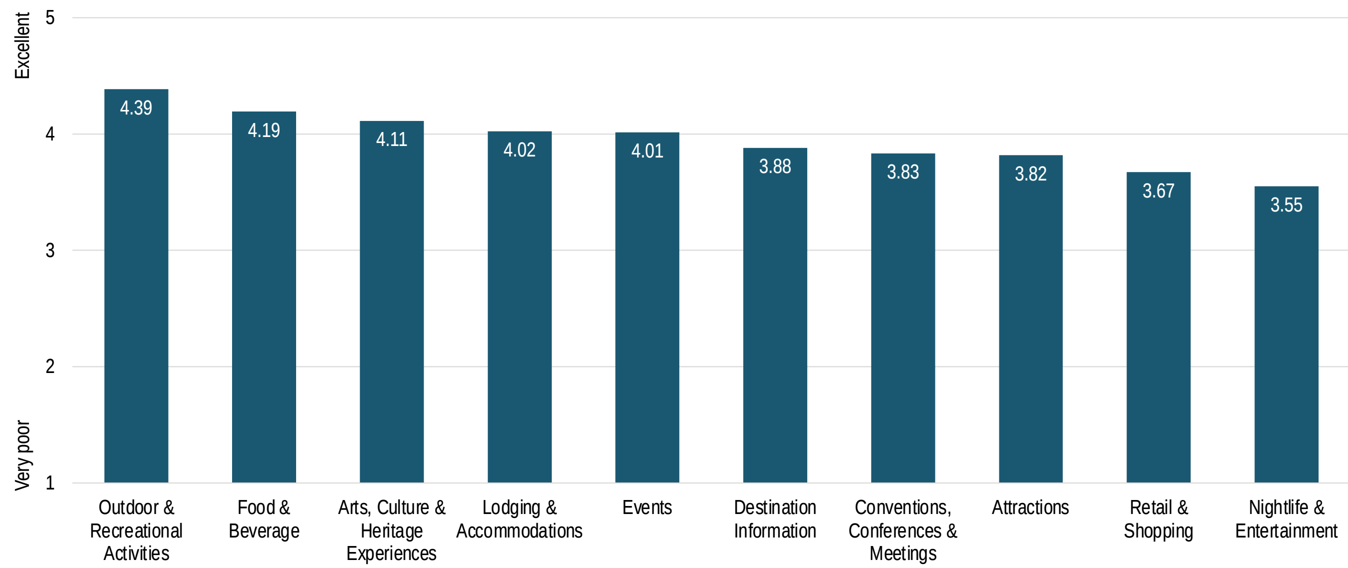
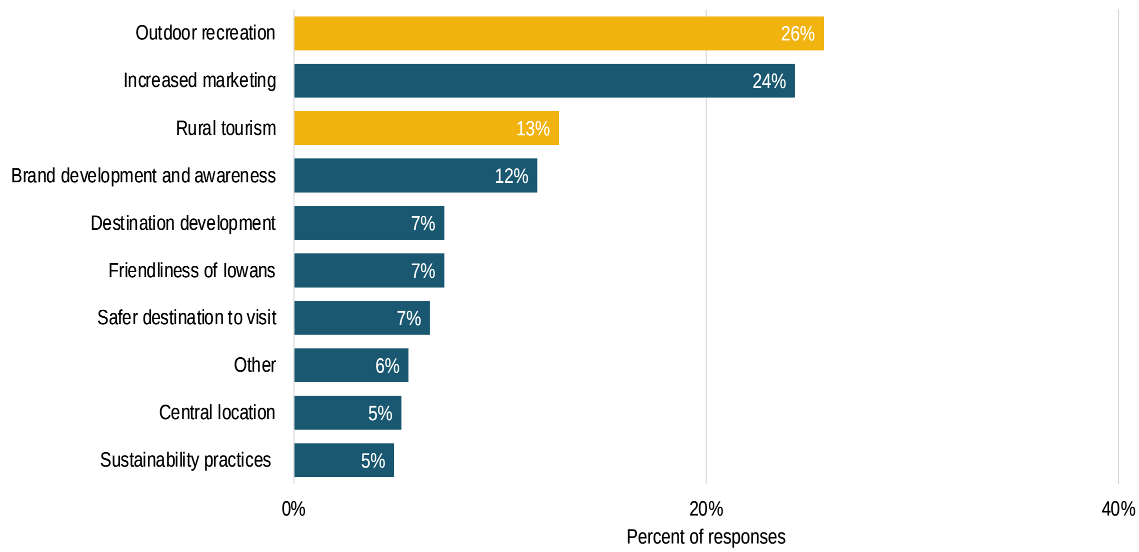


Figure 33 – Top Ten Opportunities   N=288

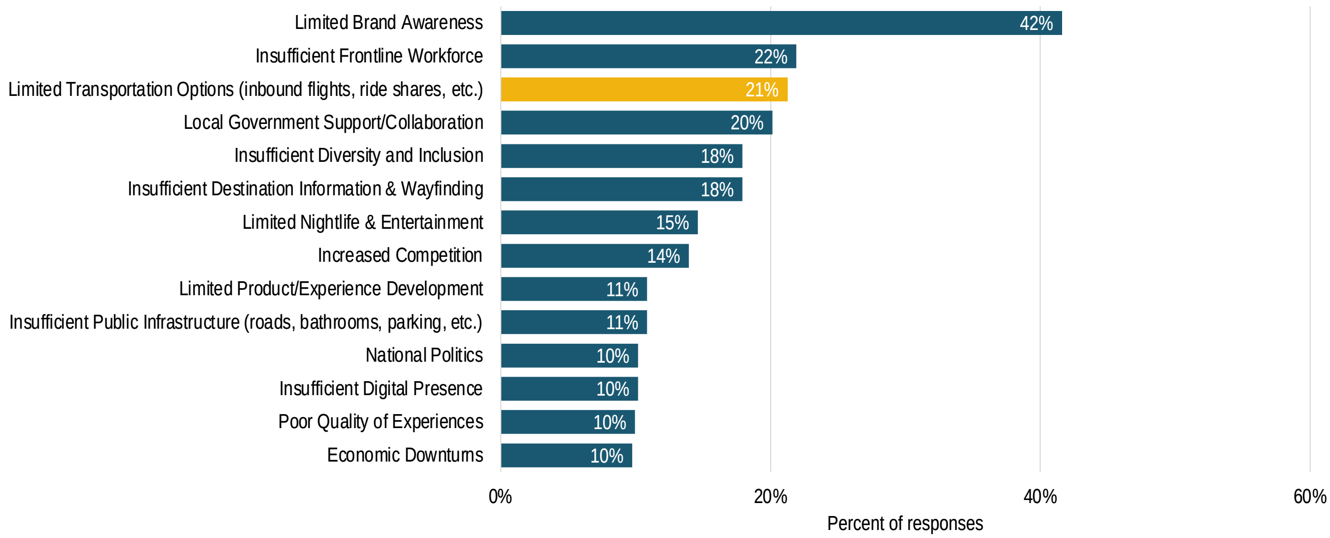
What do you believe is the greatest strategic opportunity for Iowa as a destination?



Note: Based on open-ended responses. Only top ten opportunities shown (5% or higher). Other opportunities identified included: agritourism, historical tourism, improved collaboration, being welcoming to all, culinary tourism, diversity of assets, quality of life, affordability, state fairs, arts, attracting younger visitors, politics, transportation, resident education and addressing workforce shortage.

Figure 34 – Top Threats   N=452

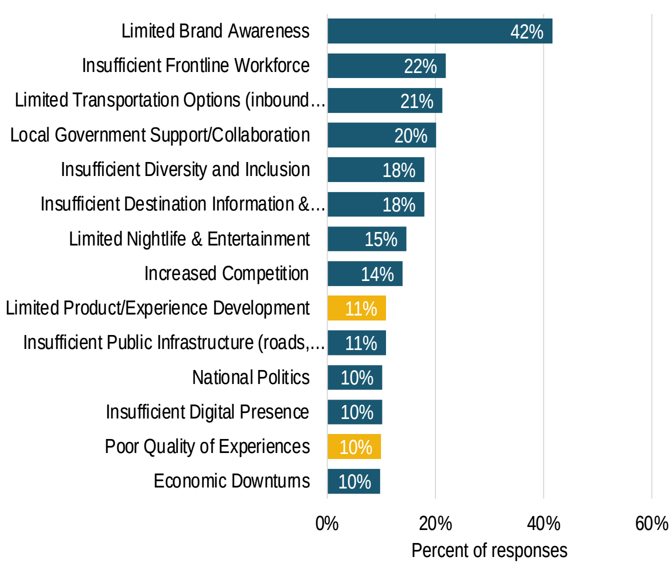
Aside from COVID-19, what do you believe are the top three threats or challenges facing Iowa as a destination?



Note: Only top threats shown (10% or higher). Other threats identified included: limited shopping and retail, workforce housing, shifting travel patterns, limited lodging, resident/community resistance, climate change, limited dining, public health threats, homesharing, safety concerns, pollution and overtourism.

Figure 35 – Top Threats and Opportunities   N=452

Aside from COVID-19, what do you believe are the top three threats or challenges facing Iowa as a destination?



N=288

What do you believe is the greatest strategic opportunity for Iowa as a destination?

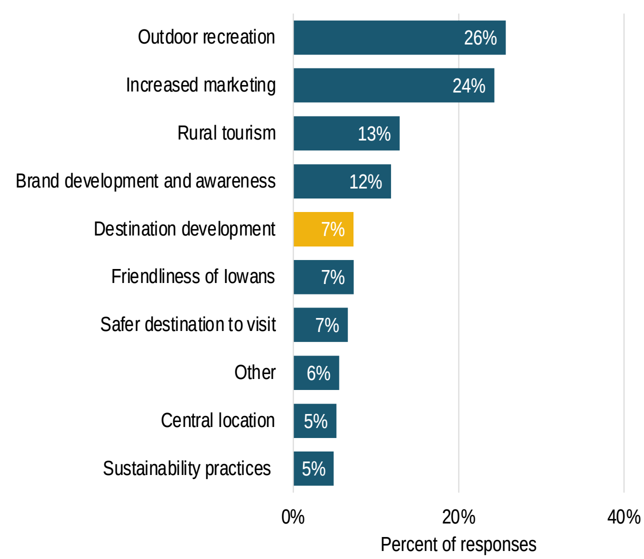
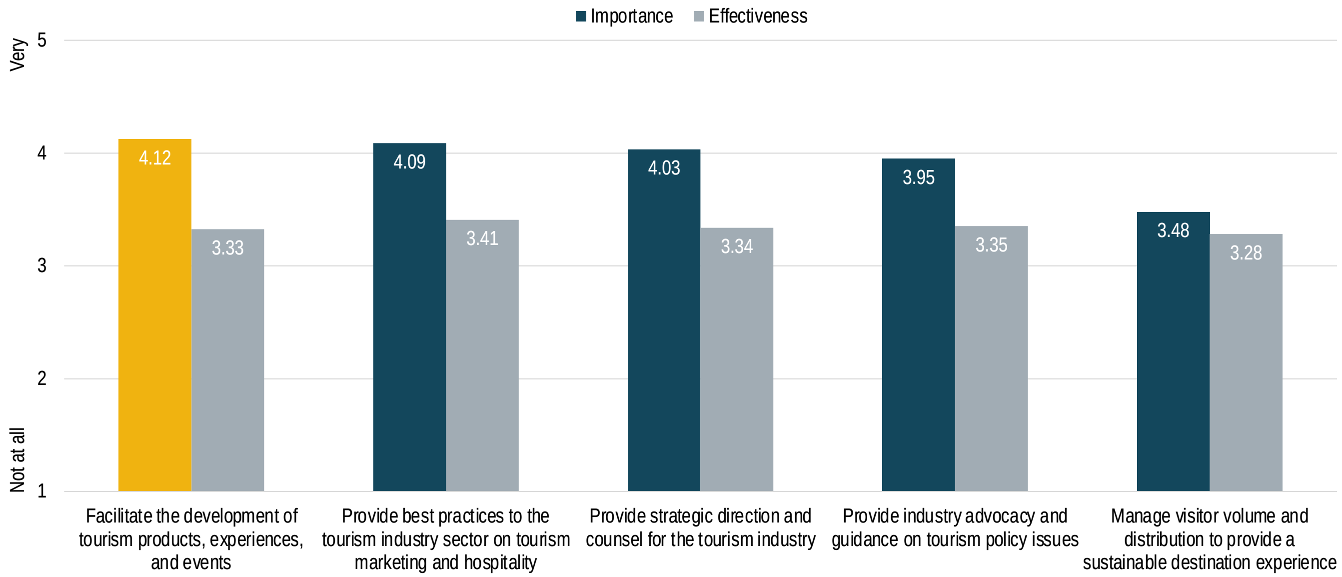


Figure 36 – Destination Management Roles N=343

Please rank how important and effective the following destination management roles are to you and the success of Iowa as a destination.



What We Heard

"Raising awareness of existing unique destinations in Iowa and creating new ones is key."

"Develop outdoor recreation infrastructure, supporting infrastructure and do it year round."

"We need more exciting attractions to draw people here for all ages. Iowa is not the most exciting state."

"The greatest strategic opportunity for Iowa is to become a more welcoming state and the State of Iowa to put more resources toward tourism marketing and tourism product/quality-of-life product development."

"Identify Iowa's low-resource communities that have underdeveloped tourism assets, but strong potential as a destination, and assist the development of these assets through a new competitive grant program (several $10,000 grants) that provides professional tourism on-site consultation and marketing financial assistance."

"The greatest strategic opportunity is grants that will assist small communities in creating destination attractions and beautification of their communities."

"We need to invest in our natural resources and not put CAFOs along our trout streams. Over the past ten years, we see community after community who invest in natural resources and infrastructure around it improve their economic standing because of increased tourism (Manchester, Dubuque, central Iowa). It is time the state does the same thing."

"The greatest challenge facing Iowa as a destination is insufficient Public Infrastructure to support outdoor recreation - LAND AND WATER TRAILS, RESTROOMS, PLAYGROUNDS, CAMPGROUNDS."

"Need to invest not just in marketing, but in creating a pipeline of offerings that will attract people to our state."

Theme Six

Iowa needs a unified brand and enhanced industry marketing to elevate the state's competitive position.

Insights

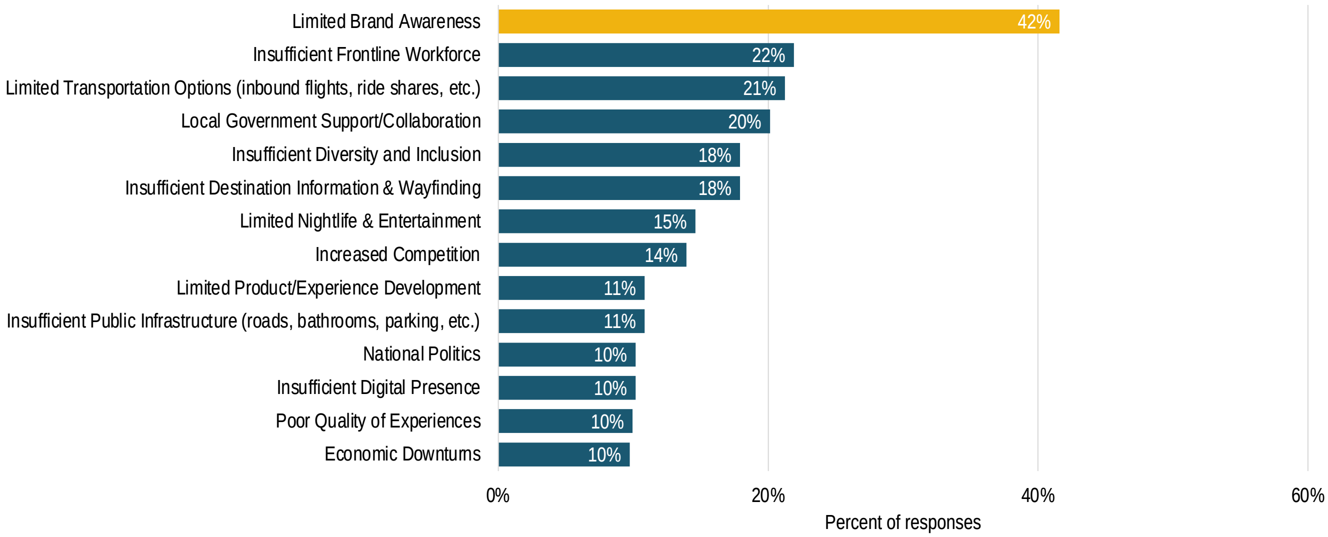
1. Stakeholders rated "limited brand awareness" as the leading threat facing Iowa as a destination. (Figure 37 – Top Threats)
2. Stakeholders stressed a need for a more unified marketing strategy (Figure 38 – Top Ten Opportunities) and ranked the industry's effectiveness in destination marketing as less than satisfactory overall. (Figure 39 – Destination Marketing Roles)
3. The Marketing co-op program's current approach to co-branded advertising creates a risk of brand dilution and consumer confusion. Without stricter requirements for consistent and strategic messaging, style, and quality, Iowa's state tourism brand will lose recognizability and prestige.
4. Focus group participants cited opportunities for tighter and stricter strategic brand control over the collective statewide marketing effort through the Marketing Co-op program.
5. Focus group participants identified frustrations with the industry's arbitrary geographic territories, regional in-state competition, and industry power struggles that limit the impact of already limited resources and undermine the potential of a more unified brand voice and identity.
6. Focus group participants identified significant opportunities to leverage Iowa's competitive strengths in agritourism, unique and hidden gems, and friendly rural culture and people.

Implications

1. Competition for regional visitor attention will continue to increase, with many states receiving significant federal funding for COVID-19 industry recovery. With significantly less funding available for marketing as compared to competitor states in the region, it is strategically prudent for Iowa's statewide brand and marketing strategy to unify messaging and visitor perception at the state level to simultaneously achieve efficiencies and move the needle on awareness and perception.
2. Iowa's abundant agricultural heritage, colorful rural communities, wide open spaces for recreating, and friendly culture offer significant opportunity to compete for regional drive market visitors seeking approachable and affordable family-friendly experiences.
3. Industry stakeholders are challenged by very low marketing budgets, making it difficult to deploy strategic and effective advertising campaigns on their own. As a result, many entities are competing with neighboring communities for fractional share of voice within the same in-state markets. ITO can elevate strategic impact of brand and marketing by incentivizing collaboration among stakeholders, ensuring adherence to image and messaging strategy, building awareness programs rooted in visitor experience, and bundling resources for greater impact in competitive media markets.

Figure 37 – Top Threats   N=452

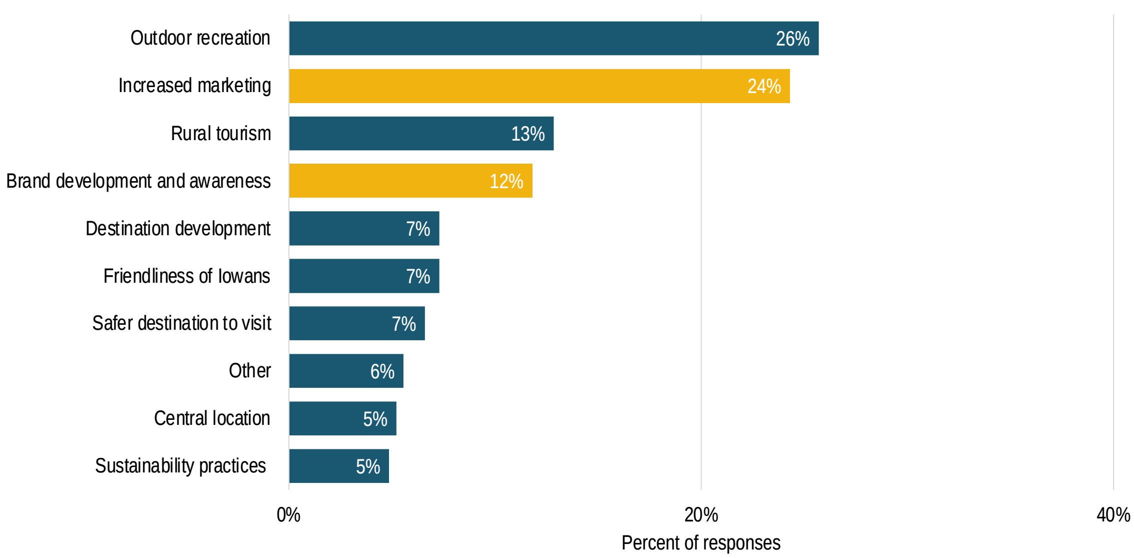
Aside from COVID-19, what do you believe are the top three threats or challenges facing Iowa as a destination?



Note: Only top threats shown (10% or higher). Other threats identified included: limited shopping and retail, workforce housing, shifting travel patterns, limited lodging, resident/community resistance, climate change, limited dining, public health threats, homesharing, safety concerns, pollution and overtourism.

Figure 38 – Top Ten Opportunities   N=288

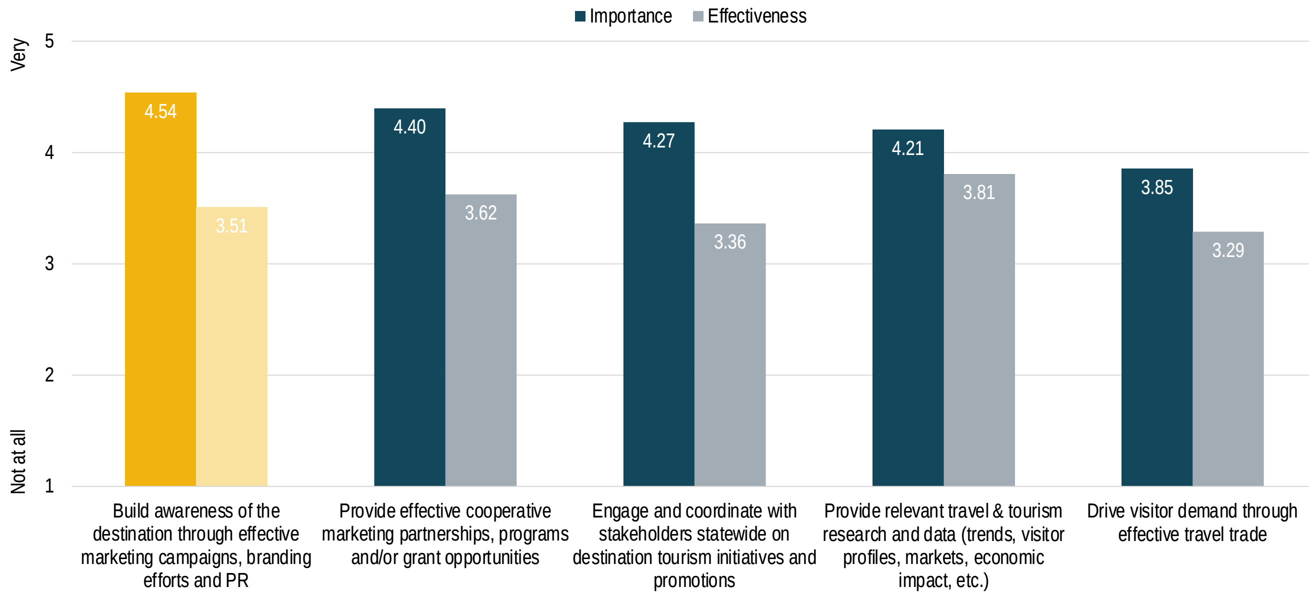
What do you believe is the greatest strategic opportunity for Iowa as a destination?



Note: Based on open-ended responses. Only top ten opportunities shown (5% or higher). Other opportunities identified included: agritourism, historical tourism, improved collaboration, being welcoming to all, culinary tourism, diversity of assets, quality of life, affordability, state fairs, arts, attracting younger visitors, politics, transportation, resident education and addressing workforce shortage.

Figure 39 – Destination Marketing Roles   N=364

Please rank how important and effective the following destination marketing roles are to you and the success of Iowa as a destination:



What We Heard

"Local efforts should tie to a stronger state brand/theme."

"Develop the singular brand theme everyone around the state can rally around."

"#thisisiowa. What is our brand. What tools do we have to promote. What is our common theme. Need to create our image that resonates nationally and globally."

"Need a cohesive voice to develop a shared brand; unified messaging. What is it that ties us all together."

"We need to speak the same language, show a united front... Stronger voice together."

"Bring the industry together to promote Iowa, one voice."

"More hospitality type trainings; help small businesses with experiential training/ learnings. Teaching about top-notch customer experience"

"Bring communities together to share resources"

"Need to get away from niche marketing and start moving toward a broader base. Umbrella vs pinpoint"

"We have beautiful and wonderful things in the state, there is opportunity to better share our story and what we have."

"Need for a more shared message. Everyone is still really just on their own to get the word out. No central messaging currently in place."

"Make it easier to equip everyone with a shared identifier. Then everyone can amplify it together."

"We have a lot of singular highlights. but not marketed together."

"We don't have an image, we struggle with being known as a fly over state."

"I think there is a real opportunity for the state to help elevate the marketing outside of Iowa and to help elevate individual DMO and attraction marketing within the state of Iowa."

"People don't know what our brand is. We need one first. What is Iowa's tourism Brand?"

"A statewide brand we can all get behind and help promote. Branding assets that could be shared."

Theme Seven

Tourism growth will require strategies that ensure diverse communities (race/ethnicity, gender, sexual orientation, disability, etc.) feel welcome.

Insights

1. Some of the key words used to describe Iowa's brand are friendly, nice, and welcoming. (Figure 40 – Iowa's Brand) However, some stakeholders raised concerns that certain demographic groups visiting Iowa may have a different experience.
2. Iowa is not seen as racially and ethnically diverse by stakeholders. (Figure 41 – Iowa's Reputation as Welcoming to All)
3. Survey respondents identified the state's lack of diversity and inclusion as a top threat facing Iowa as a destination. (Figure 42 – Top Threats)
4. Stakeholders believe opportunities exist to better appeal to people from diverse backgrounds and authentically welcome all communities. (Figure 41 – Iowa's Reputation as Welcoming to All)
5. Survey respondents indicated that there are opportunities for ITO to engage with diverse communities more actively in the development and promotion of the destination, as well as put more resources behind inclusive marketing and programming. (Figure 41 – Iowa's Reputation as Welcoming to All)
6. Stakeholders indicated that at times, state politics or policies create barriers for diverse communities and the tourism industry more broadly.

Implications

1. Diverse communities, particularly travelers of color, are some of the fastest growing traveler segments in the United States.
2. Increasing market share relies on reaching new audiences. Developing relationships with and marketing the state toward more diverse visitors will help to broaden Iowa's reach as a destination.
3. There is a long-term connection between tourism and people choosing to relocate permanently to a destination because of amenities, quality of life, and jobs. Iowa's ability to broaden its appeal to diverse communities will not only help grow the tourism industry, but also potentially expand the state's population and workforce.

Figure 40 – Iowa's Brand   N=516

What three words do you believe describe Iowa's brand as a destination?

Figure 41 – Iowa's Reputation as Welcoming to All   N=536

Please select your level of agreement with each statement:

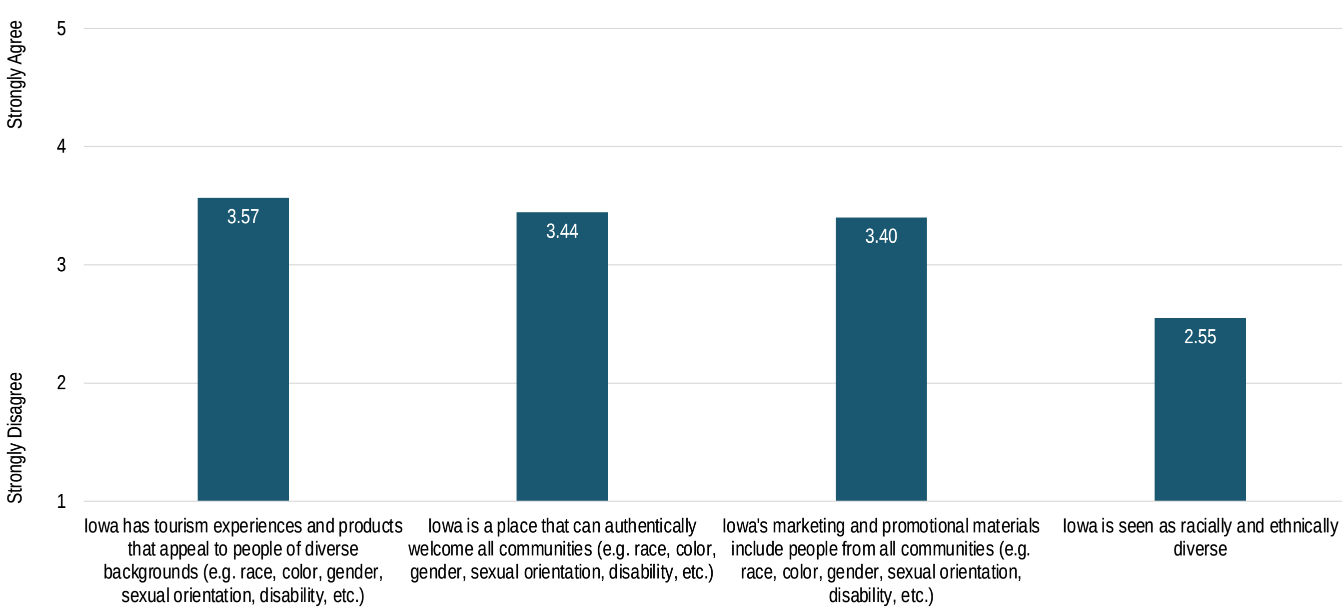
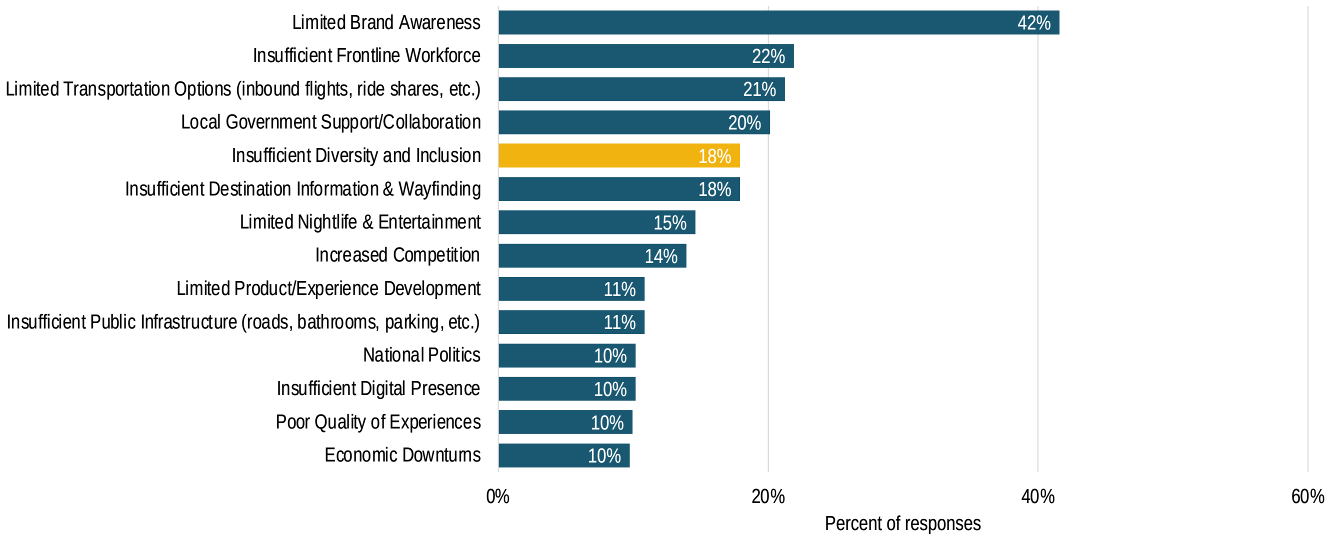


Figure 42 – Top Threats   N=452

Aside from COVID-19, what do you believe are the top three threats or challenges facing Iowa as a destination?



Note: Only top threats shown (10% or higher). Other threats identified included: limited shopping and retail, workforce housing, shifting travel patterns, limited lodging, resident/community resistance, climate change, limited dining, public health threats, homesharing, safety concerns, pollution and overtourism.

What We Heard

"Visitors get uncomfortable when the political situation is polarizing, and international travelers feel uncomfortable with all of that rhetoric. I wish the state would be more neutral and not feel so scary to our visitors and immigrants."

"Our politics need to calm down and not feel scary to immigrants."

"There are not enough people to fill all these jobs. We must figure out how Iowa can be welcoming to immigrants that are looking for a safe place to live…we have to figure out a way to bring immigrants here."

"All the PR about Iowa is negative."

"Part of it is maybe an education process, getting industry members to think about broader types of audiences."

"We have had a rich history of welcoming people here."

"Are we as diverse as Florida? No. But we are welcoming and there are great opportunities for everyone here. The political divide can definitely create negative perceptions, but there is no other way to overcome that other than to promote how welcoming we are."

"We need to respect each other and to more accurately portray our people in Iowa."

"DEI definitely needs to be a goal and an objective for this strategic plan. It's not innate."

"We need to focus on DE&I: start with research, then design programs based on findings, then implement."

"Need to actively engage diverse communities. A true authentic discussion. Bring voices to the table."

"I don't think we are an extremely welcoming state to diverse markets. It's hard to change people's beliefs about other ethnicities. I think Iowa is behind the game on that and that is a real challenge."

"We are "Iowa Nice" for a reason. Perceptions exist because we are in the Midwest, but most want people to come and experience Iowa."

"You can't just do something today and be done – it has to be about reaching more diverse groups, representing those groups so that they feel a part of it, rather than seeing themselves as 'other'."

"We should be focused on attracting new travelers to the state because they also become more likely to consider moving here to join the workforce."

"We have to be offering signage in different languages, interpreters. Marketing to diverse groups. It goes back to our agricultural roots as well. We have diverse employees working in agriculture. Make that a known aspect of our state."

"There are parts of the industry that are very supportive of DEI issues, however there are parts of the industry that have actively avoided DEI. If the state wants to be better, we actually have to be better."

"We need to be supportive of it as an industry. Don't have an answer but this is something that is important, and we need to be unified behind."

"We are known for our hospitality. Let's leverage that, but ensure the messaging is welcoming. Seek out and make people feel comfortable."

"There are times Iowa isn't nice to certain populations."

"Need to authentically include diverse communities at the table for important decisions, discussions, ensure our underrepresented communities are seen and heard and included."

Theme Eight

Tourism industry programs are underutilized, lack broad awareness, and fail to articulate measurable impact and value.

Insights

1. Many tourism industry programs have low awareness and low participation among tourism businesses and attractions. (Figure 43 – Program Familiarity & Figure 44 – Program Participation)
2. The Iowa Tourism Grant and the Marketing Co-op program have a high level of awareness, but approximately one-quarter of stakeholders have never participated. (Figure 43 – Program Familiarity & Figure 44 – Program Participation)
3. Stakeholders find programs to be important but believe ITO could be more effective in their delivery. (Figure 45 – Programs)
4. Stakeholders identified barriers to participation to include: limited time/personnel resources, grant writing bandwidth and skills, fund matching challenges, and application timing/planning cycle conflicts.
5. Survey participants believe opportunities exist to make improvements to the Marketing Co-op program. Stakeholders are unsure if there is a positive return on investment or if impacts are measurable. (Figure 46 – Marketing Co-op Program Quality).
6. While marketing of Iowa to out-of-state markets was ranked of the highest importance, ITO's effectiveness for this item was rated relatively low. (Figure 45 – Programs)

Implications

1. ITO can increase industry awareness of available programs, eligibility, and impact by developing an industry-facing marketing strategy to optimize partner engagement and awareness.
2. Investing in more grant-related training opportunities and support resources would pay off in both participation and collaboration impacts, leading to greater impact of programs and strategy.
3. While not all programs are relevant to all stakeholders, the low awareness level of many programs indicates potential for improvement through education and industry-targeted information campaigns.
4. PR programs present an opportunity for a relatively low-cost Marketing Co-op expansion to supplement partner investment, drive shared strategy and messaging, and elevate partner collaboration for statewide impact.

Figure 43 – Program Familiarity N=120

What is your level of familiarity with the following program?

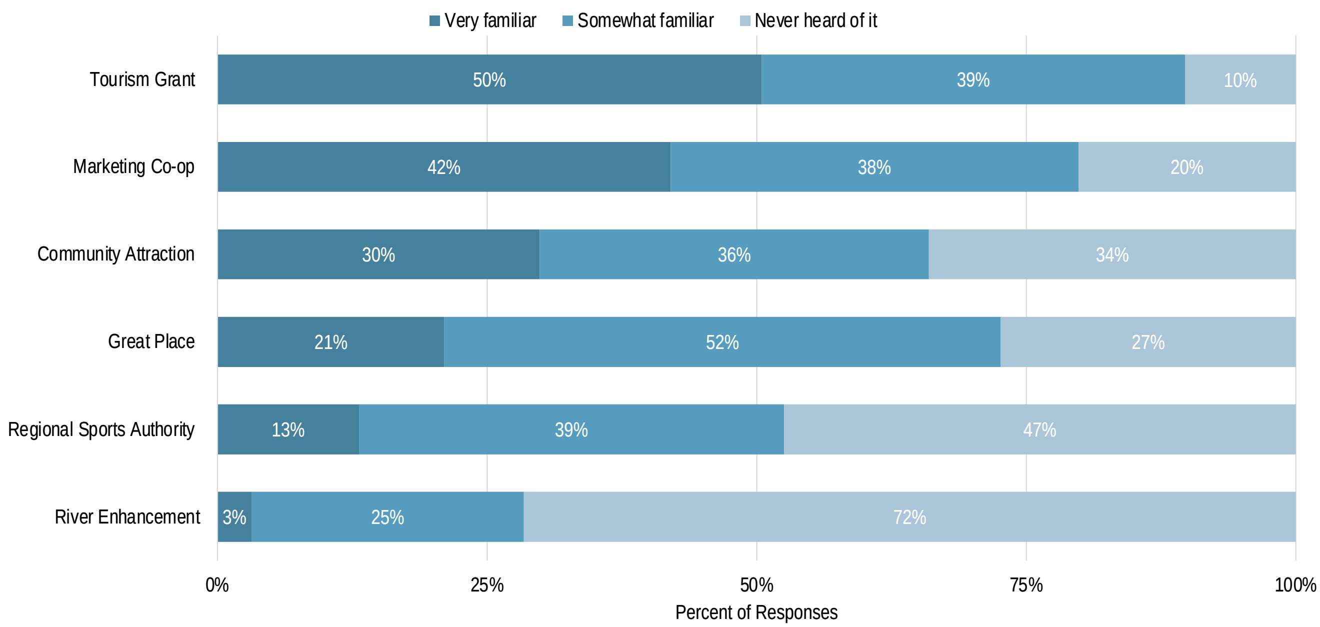


Figure 44 – Program Participation   N=120

What is your level of participation in the following program?

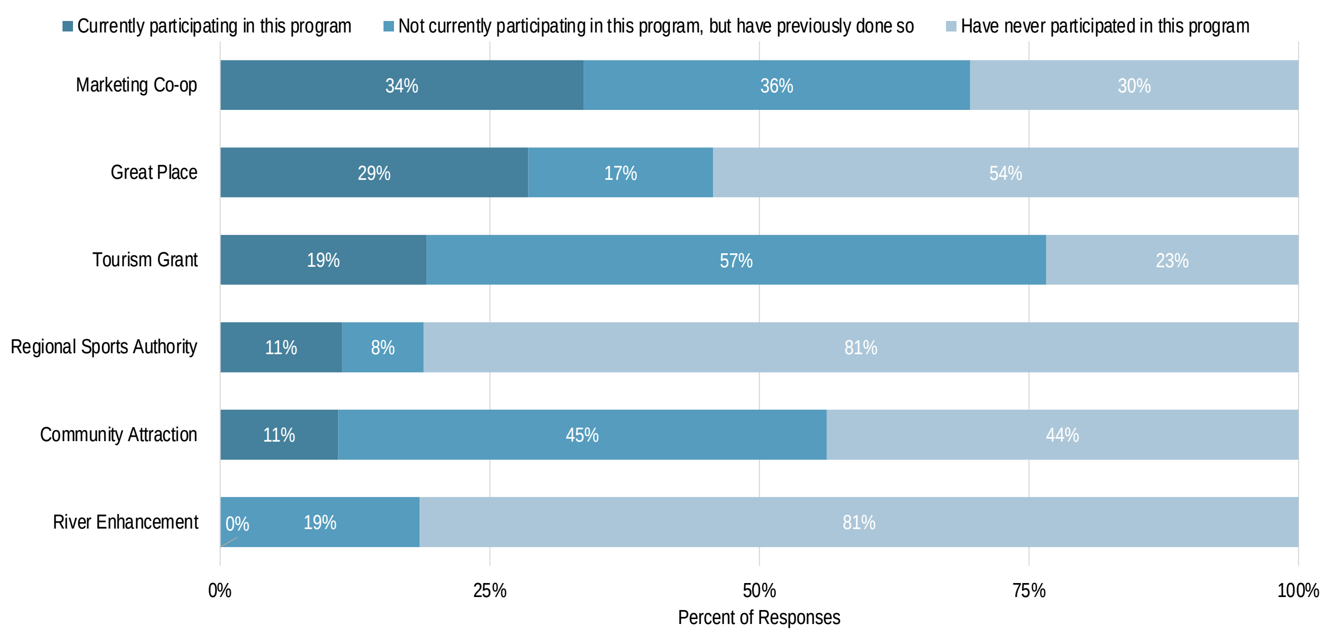


Figure 45 – Programs N=346

Thinking about the Iowa Tourism Office's programs, how would you rate the importance and effectiveness of the following:

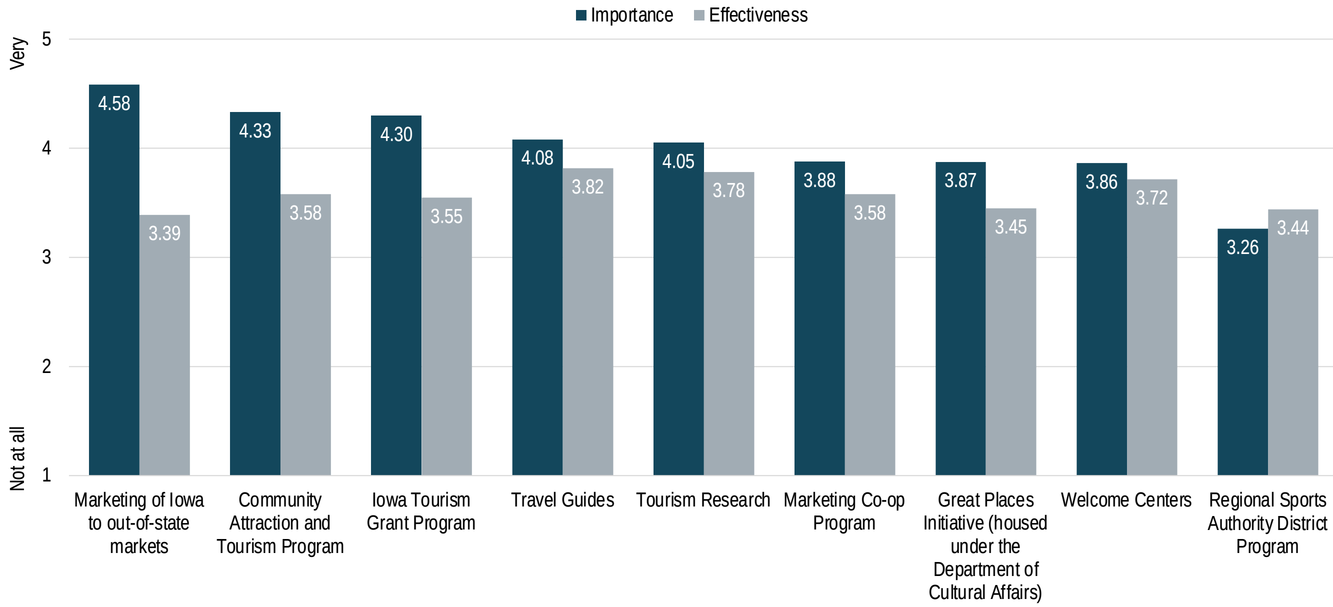
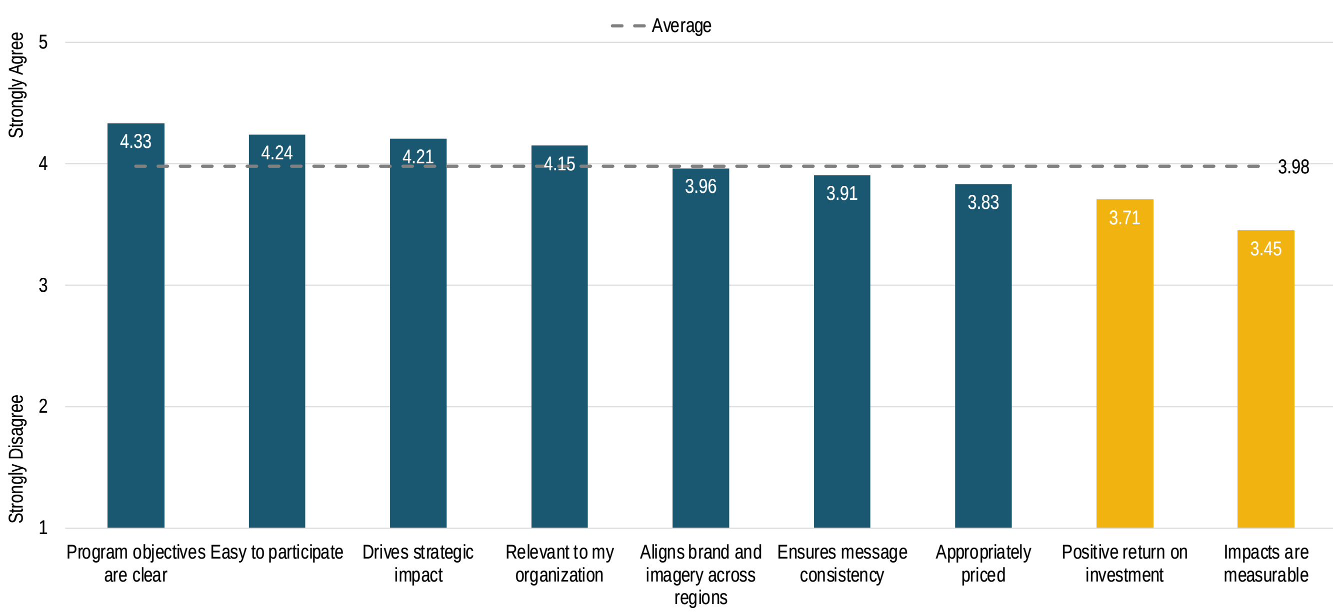


Figure 46 – Marketing Co-op Program Quality N=55

Please rate the degree to which you agree with the following statements regarding the Marketing Co-op Program, as it relates to your organization:



What We Heard

“Share success stories of program to help gain buy-in. Feedback mechanism so we can learn what works.

“Make it easier to collaborate.”

“Analyze results of past year to impact focus for the following year. “

“Need help to build better regional partnerships.“

“Make it easier to collaborate.”

“Bring communities together to share resources.”

“Training on how to apply/navigate a website for application submittals”

“Sometimes amount not worth it; in others the match requirement is too high.”

“What does successful collaboration look like? Need to provide examples to help participants brings partners on board.”

Program Assessment

Goals of Program Evaluation

The program evaluation effort was designed to explore stakeholder perceptions, awareness, participation, and opportunities for expansion and/or improvement of the programs administered directly by ITO. This evaluation also included high-level information gathering for inclusion of grant programs administered by other state agencies that touch and support the Iowa tourism industry, outside the scope of ITO.

Overview of Program Evaluation Approach

This process was designed to yield insights and opportunities for consideration in the future development of ITO programs and offerings. Coraggio's review included the following tourism support programs:

- Iowa Tourism Grant Program
- Marketing Co-op Program
- Regional Sports Authority District Program
- Community Attraction and Tourism Program
- Great Places Initiative (Iowa Arts Council/Department of Cultural Affairs)

The evaluation was designed to assess Iowa's tourism programs in relation to:

- Stakeholder awareness
- Program quality/performance
- Program strategy/impact
- Alignment with stakeholder needs
- Stakeholder utilization
- Return on investment
- Program innovation
- Program durability

The program evaluation process was divided into two phases. The first phase focused on gaining an understanding of current tourism programs, their offerings, and their requirements. We reviewed all available program information and interviewed ITO staff closest to the programs to understand their structure and desired impact. This foundation of knowledge informed the development of a stakeholder survey and interview discussion guide.

The second phase of this process involved evaluating the tourism programs as informed by the stakeholder survey, relevant focus group insights, and interviews to determine how well the current program portfolio is meeting the evolving needs of the state's tourism industry stakeholders.

1. Review of available materials
2. Discovery session with ITO programs team members
3. Stakeholder survey for quantitative analysis of utilization, perceptions, performance, and strategic alignment of programs
4. Focus Group exploration of program perceptions and opportunities
5. Individual interviews with key stakeholders to gather qualitative perspectives and insights
6. Synthesis of all inputs into themes and implications
7. In-depth SWOT analyses for both the Marketing Co-op and Iowa Tourism Grant programs

Program Assessment Summary

Overall, Iowa's statewide tourism programs offer a variety of financial resources and support to tourism businesses and organizations statewide. Each program has its own set of strengths and opportunities, as well as weaknesses and threats. In general, the state of Iowa's tourism support programs suffers from low funding levels ostensibly hindering strategic impact, stakeholder outreach, and program effectiveness, especially when compared against surrounding states in the region.

The Iowa Tourism Office can more deeply engage and support the statewide industry through expanded programming investments. Opportunities for improvement include:

- Increased clarity and focus of statewide brand and marketing strategy, through which the Marketing Co-op and Iowa Tourism Grant's purpose and execution can be aligned and elevated
- Recruitment of new and/or more diverse stakeholders to inform evolution of and engage with program opportunities
- Program promotion to increase stakeholder knowledge of programs' offerings, application, eligibility, and strategic benefits

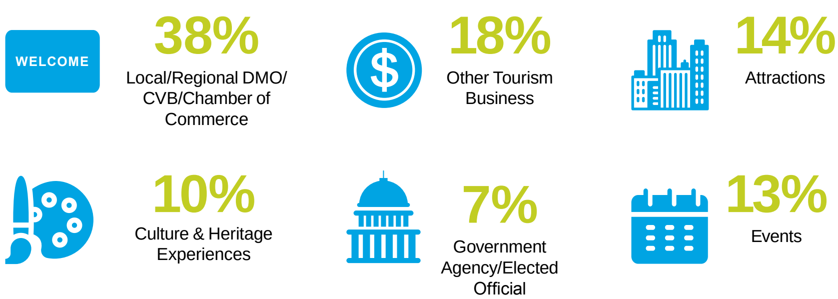
- Reporting of impact and outcomes to increase stakeholder visibility and understanding of programs' collective impact, participation, outcomes, and success
- Leveraging third party insights and resources where possible to:
  - Explore the roles of local and regional tourism organizations in future program considerations
  - Explore broader and larger funding opportunities outside of current funding sources to enable program expansion, industry engagement, and incentivization of long-term infrastructure opportunities

Survey Participant Overview

A total of 120 participants completed the Program Evaluation survey. Two individual stakeholder interviews were completed in relation to this program evaluation for qualitative insights and commentary. Participants identified themselves in terms of the nature of their relationship to the Iowa Tourism Office. The largest single category of respondents (38%) identified themselves as a local DMO, CVB or Chamber of Commerce. (Figure 47 – Programs Evaluation Survey Respondents by Affiliation)

Figure 47 – Programs Evaluation Survey Respondents by Affiliation N=94

Please choose the category below that best describes your relationship with the Iowa Tourism Office:

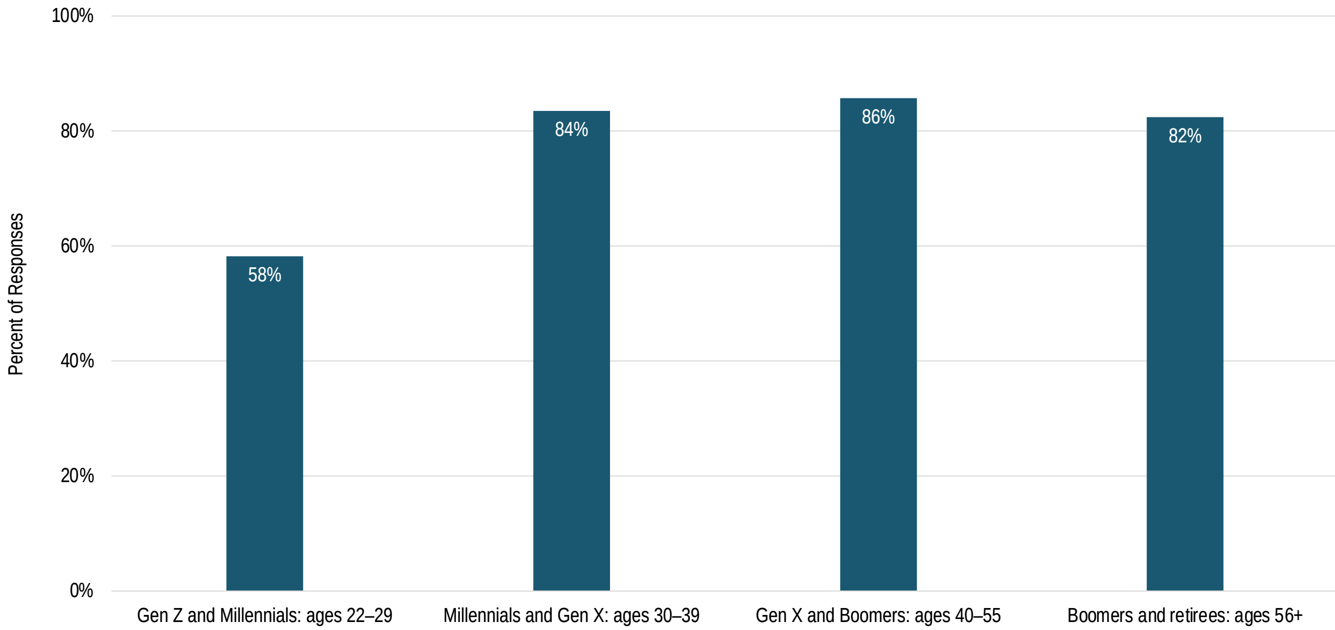


Stakeholder Demographic Targets

The primary marketing audience for most respondents is millennials and above 30+. Those with larger marketing budgets are more likely to also focus on Gen Zs (22-29 years old), with 50% of DMOs and 46% of Attractions reporting they do target this emerging traveler age group. (Figure 48 – Target Audiences)

Figure 48 – Target Audiences   N=91

Please select all of the target audiences that are included in your organization's targeted marketing strategy:

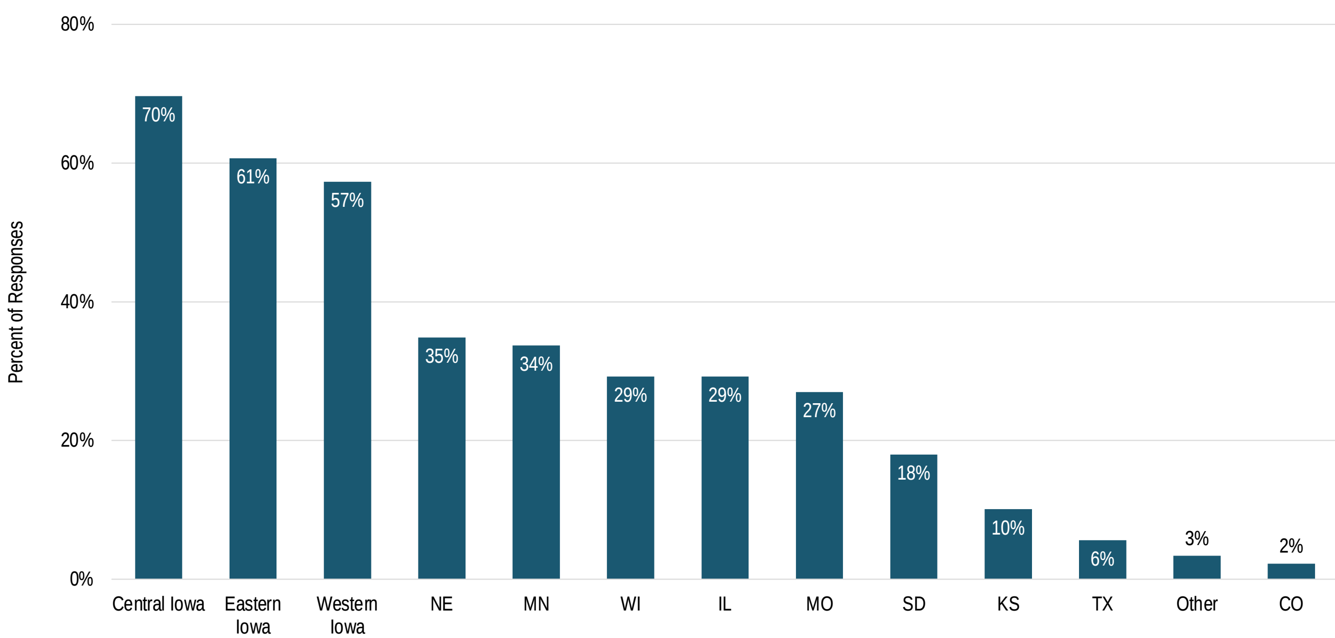


Marketing Geographies

Most stakeholders (60-70%) report investing in in-state marketing presence within one or all of Iowa's three geographically defined regions. Conversely, only 10% - 35% of respondents report having a marketing presence in one or more bordering states of NE, MN, WI, IL, MO, KS or SD. (Figure 49 – Marketing Area)

Figure 49 – Marketing Area   N=89

Please select all geographies that reflect your organization's Marketing + PR footprint:



Marketing Budgets

Marketing + PR budgets vary widely across stakeholders, with 7% reporting 3-year average annual budgets over $75,000 and a significant majority of respondent's (71%) annual marketing budgets under $25,000, with over one-third (36%) of all respondents working with annual budgets under $5,000. (Figure 50 – Marketing and PR Budget)

Relative PR allocations vary across respondents, with 46% of respondents reporting between 5% and 15% of their marketing budgets allocated to PR. Only 7% of respondents reported having zero funding allocated for PR. (Figure 51 – PR Allocation)

Figure 50 – Marketing and PR Budget N=89

Please select the $ range that best reflects your annual Marketing + PR budget *based on 3-year average: FY19, 20, 21:

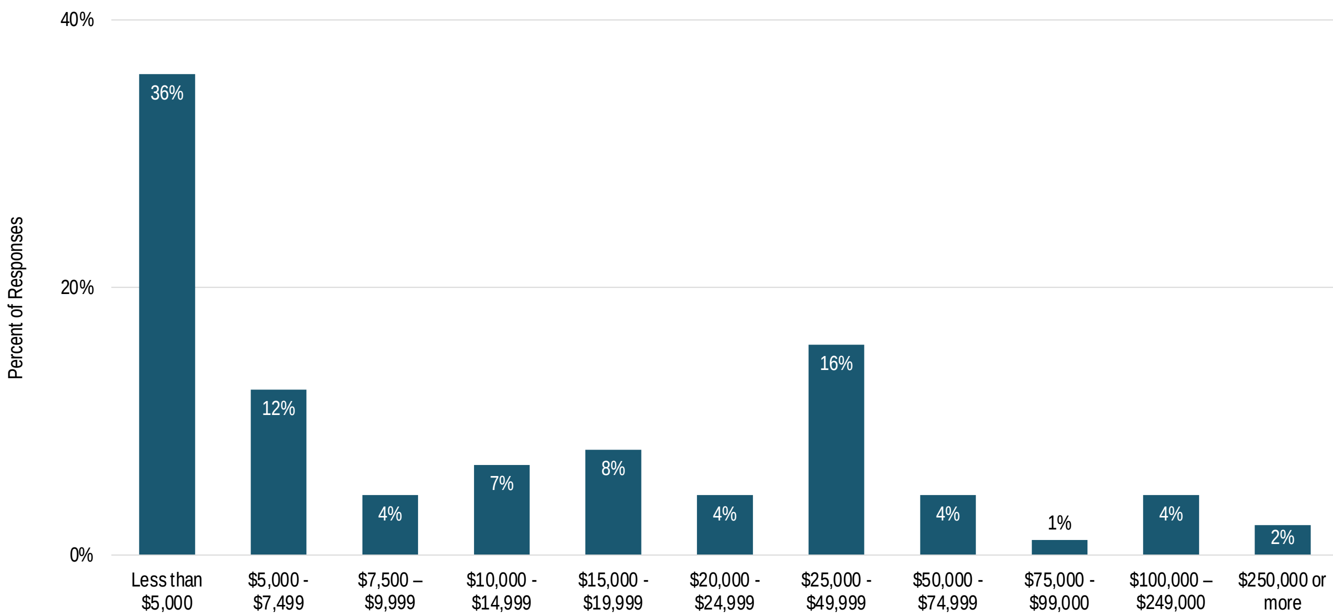
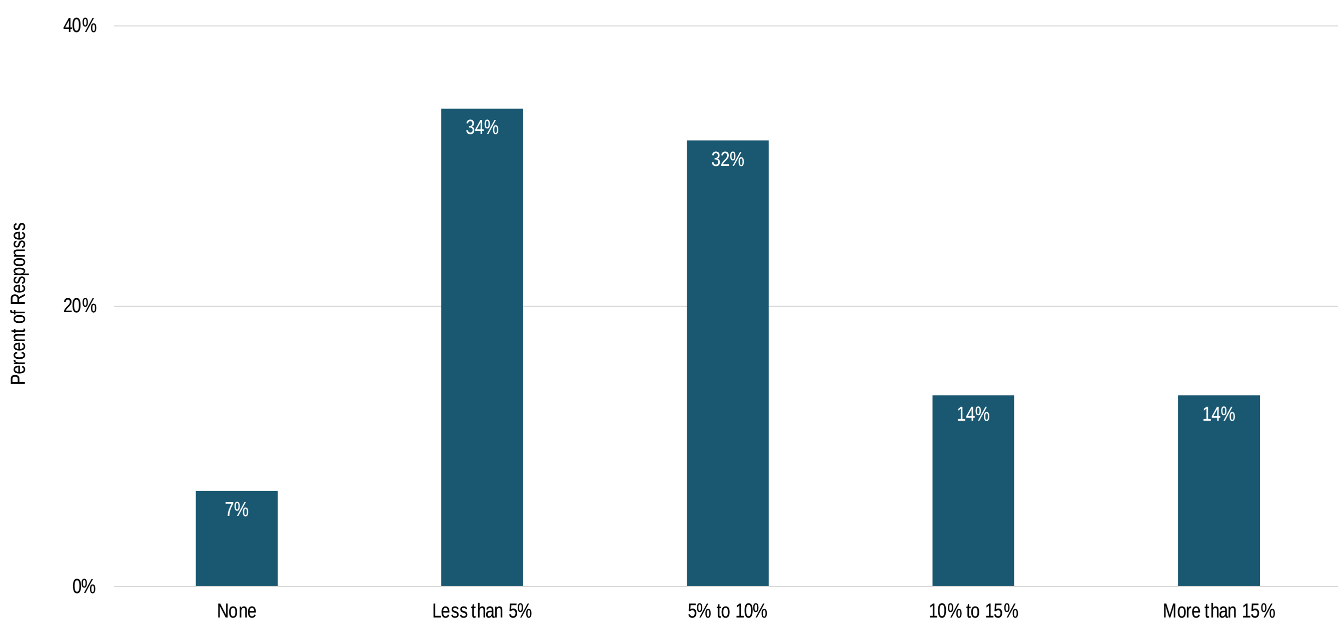


Figure 51 – PR Allocation N=88

How much of your Marketing + PR budget is allocated to PR activities?



Program-specific assessments follow:

Iowa Tourism Grants

Program Summary

"The Iowa Tourism Grant (ITG) Program promotes tourism in Iowa by funding tourism-related marketing initiatives, meetings and events that benefit both local economies and the state's economy."

Eligible applicants include tourism-related entities based in Iowa, including nonprofits, for-profits, cities, counties, and regional government and planning entities.

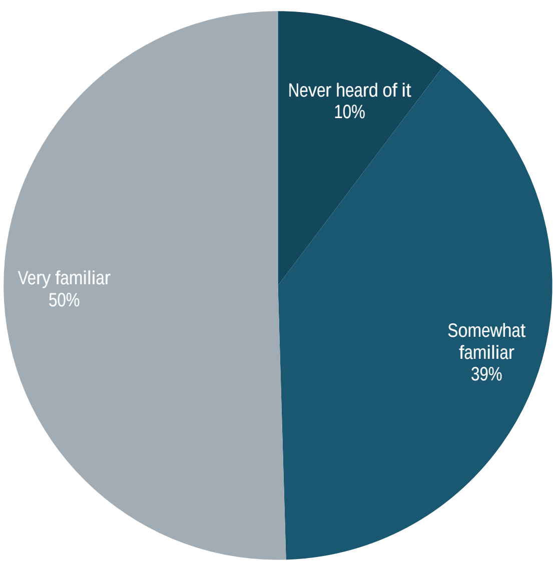
Iowa Tourism Grants

Survey Overview

Stakeholders are generally very familiar with this program, but most are not currently using it. The biggest barrier to utilization is lack of funding, and many organizations reported their applications being denied. The application process itself is perceived to be cumbersome; projects don't often fit organizations' timelines or applicants couldn't meet qualification criteria. Participant ratings indicate moderate agreement, yet responses indicate opportunities for improvement in participation, perception, awareness, and strategic impact.

Figure 52 – Tourism Grant Program Familiarity and Participation N=107, N=94

What is your level of familiarity with the Tourism Grant Program?



What is your level of participation with the Tourism Grant Program?

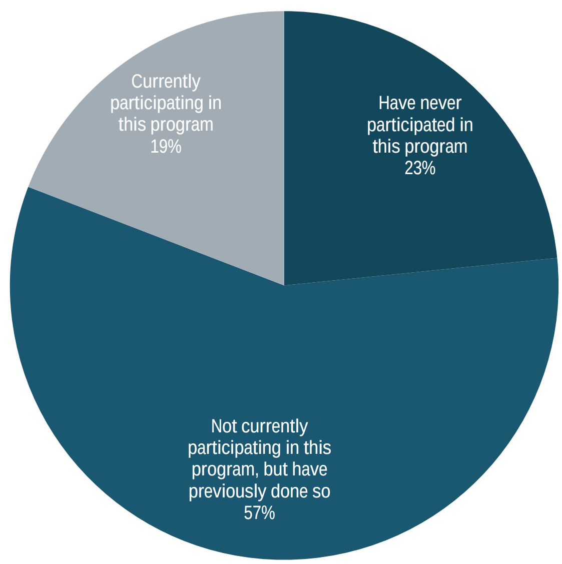


Figure 53 – Tourism Grant Program Quality N=67

Please rate the degree to which you agree with the following statements regarding the Tourism Grant Program, as it relates to your organization:

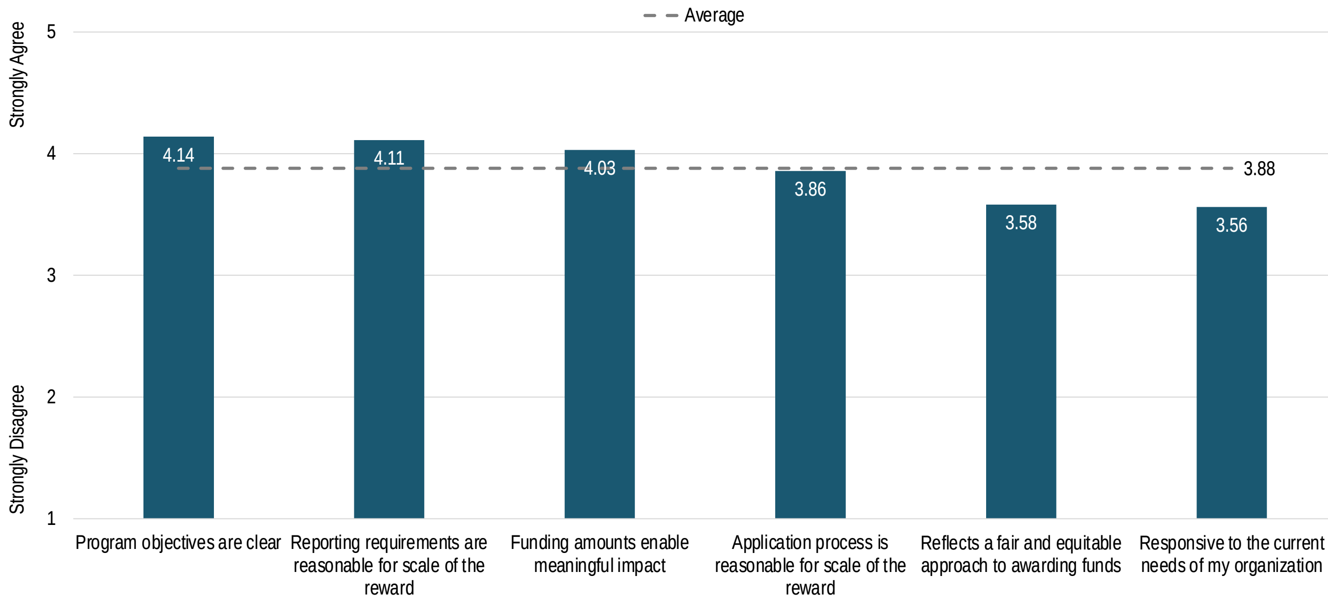
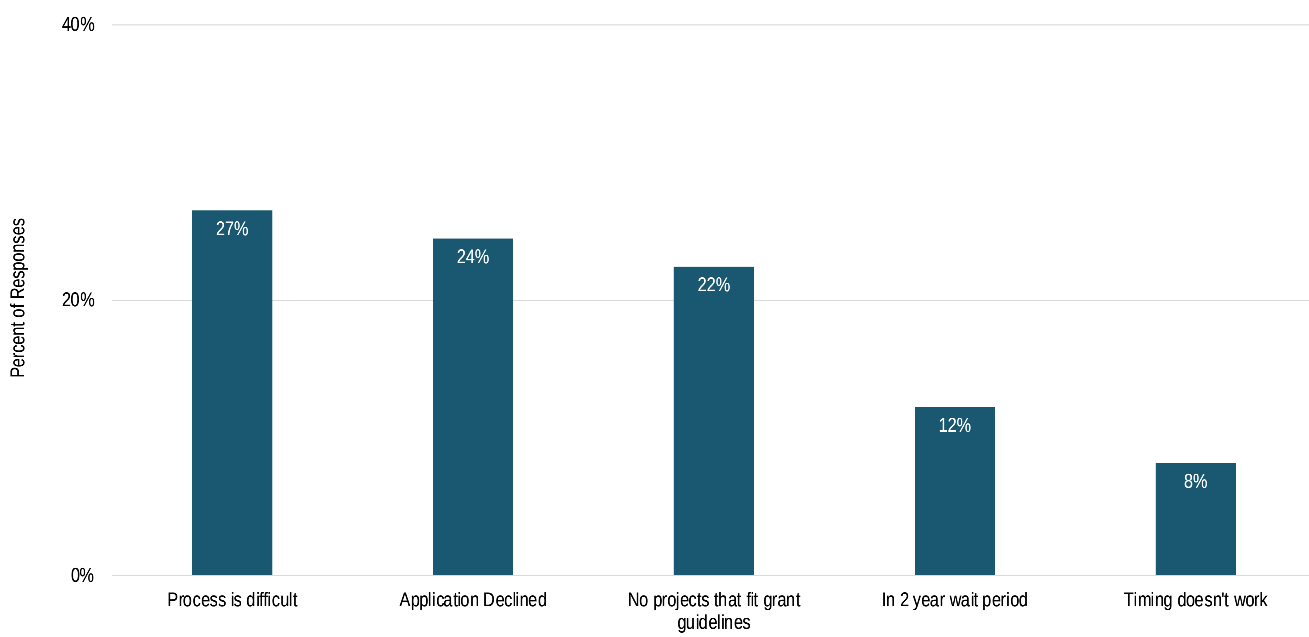


Figure 54 – Tourism Grant: Reasons for Not Participating N=49

Are there any particular reasons why you don't currently participate in the Iowa Tourism Grant Program?



What We Heard

"We have applied several times, but the timing is bad. Our brochures/magazines, etc. for the following year are already printed by the time the program comes out for the following year. No way we can acknowledge Iowa Tourism, and I suspect that's why we've never gotten a grant, though our marketing materials and our grant applications have been good."

"I don't believe the objectives have been clear historically, making it difficult to complete an application. Either that or our needs as an organization don't align well with the funding criteria available."

"For a relatively small grant amount, the application is long and requires significant background information."

"I found the application form very repetitive. I am happy to answer many questions, but many were a different way to say the same thing."

"I believe the process could be simplified. Why not produce an application form that is simple for all to complete and not just those entities with large staff that do this on a regular basis?"

Iowa Tourism Grant SWOT Analysis

Strengths:
- Smallest organizations appreciate the dollars and support
- Stakeholders are generally familiar with the program

Weaknesses:
- Low stakeholder utilization at time of survey (although could potentially impacted by COVID-19's impact on available funding)
- Feels complicated
- Repetitive application
- No consecutive year awards: doesn't sustain momentum or consistency
- Variable grant pool funding and award sizes from cycle to cycle causes unclear return on investment for applicants.

Opportunities:
- Simplify and streamline application
- Consider adjustments to the timing of deadlines and/or frequency of award cycles
- Longer lead times for application window
- Clarify and/or expand types of programs that qualify for the program.
- Build and execute a stakeholder-focused marketing and communication program:
    - Gather and share success stories of grant recipient programs to build awareness and celebrate the shared partnership outcomes
    - Leverage grant recipient experiences as learning experiences for others
    - Report regularly on measurable impacts of grants
- Conduct an in-depth comparison of state tourism grants programs within neighboring/competitor states to fully understand the funding models, funding amounts, and categories of activities supported by grant programs.

Threats:
- Funding levels are low for the time and effort required
- Funding match of 25% can be difficult (especially in pandemic recovery) for the smallest organizations for which this program is well-suited.

Marketing Co-op

Program Summary

"The Iowa Tourism Office invests more than $500,000 in its Cooperative Partnership Program, negotiating the purchase of large advertising buys and then selling that space back to our tourism partners at a cost far cheaper than what they could purchase directly."

Program offering includes opportunities in the following categories:

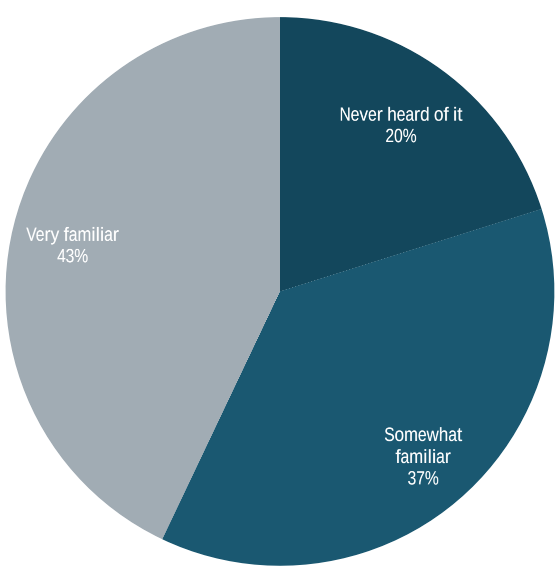
- Print
- Digital: display, video, Native, e-blast
- Arrivalist: a variety of options and price points, including A3 ($25,000)
- OOH: Digital billboards
- Influencer Marketing
- Social Media: Travel Iowa posts
- Website: Sponsored listings, sponsored leads, banner ads, email marketing

Marketing Co-op
Survey Overview

Most stakeholders are very or at least somewhat familiar with the program. Attractions and DMOs appear to use the program the most, which is currently the case. The largest barrier to participation is cost, especially for smaller markets and organizations whose budgets do not accommodate the price points. Other concerns were with perceived performance/return on investment. Making it easier for smaller organizations to participate was identified as the biggest improvement opportunity, followed by improving the process overall. Generally, the process is considered to be cumbersome, requiring time, skill, and resources (e.g. program application writers) that hinder smaller organizations' ability to apply.

Figure 55 – Marketing Co-op Program Familiarity and Participation N=120, N=93

What is your level of familiarity with the Marketing Co-op Program?



What is your level of participation with the Marketing Co-op Program?

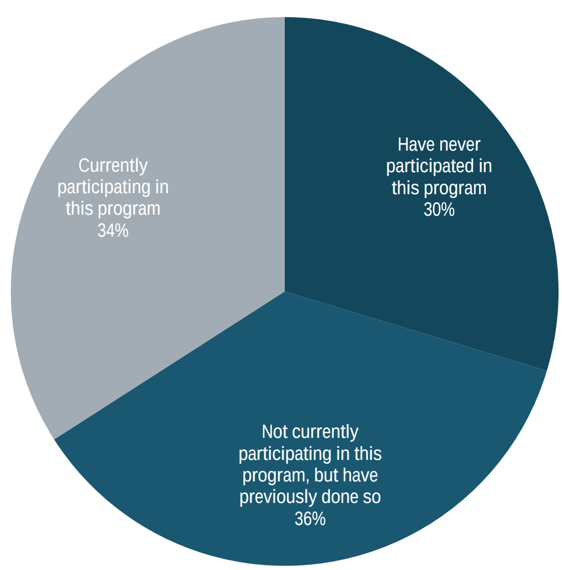


Figure 56 – Marketing Co-op Program Quality N=55

Please rate the degree to which you agree with the following statements regarding the Marketing Co-op Program, as it relates to your organization:

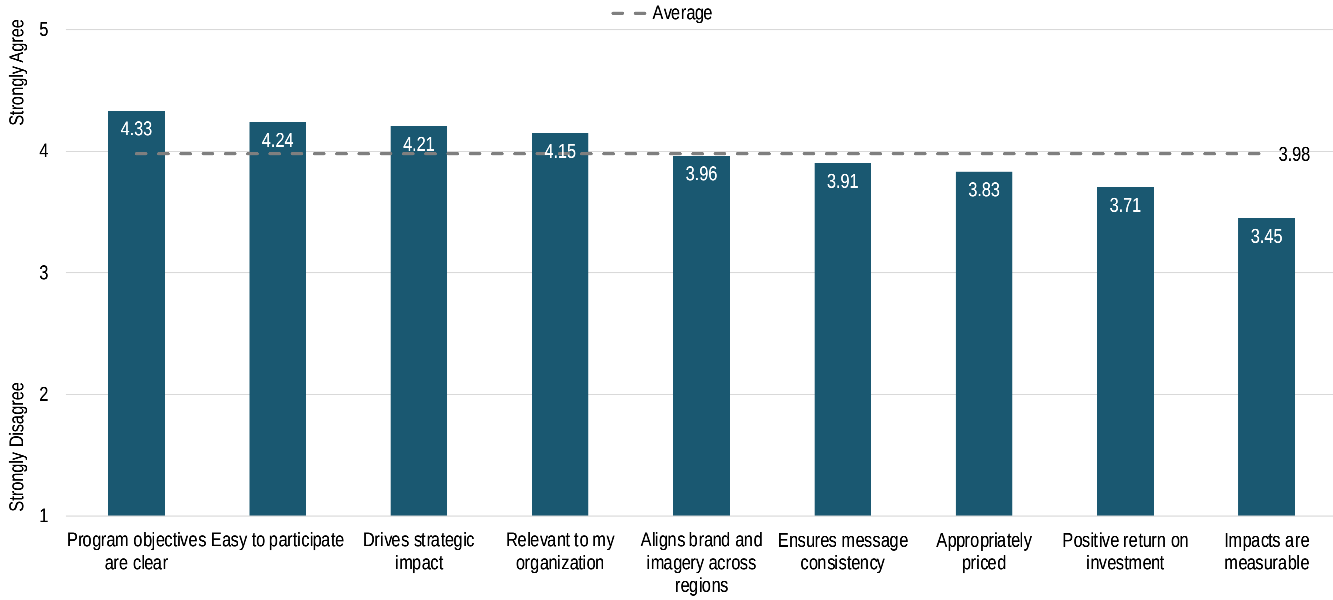
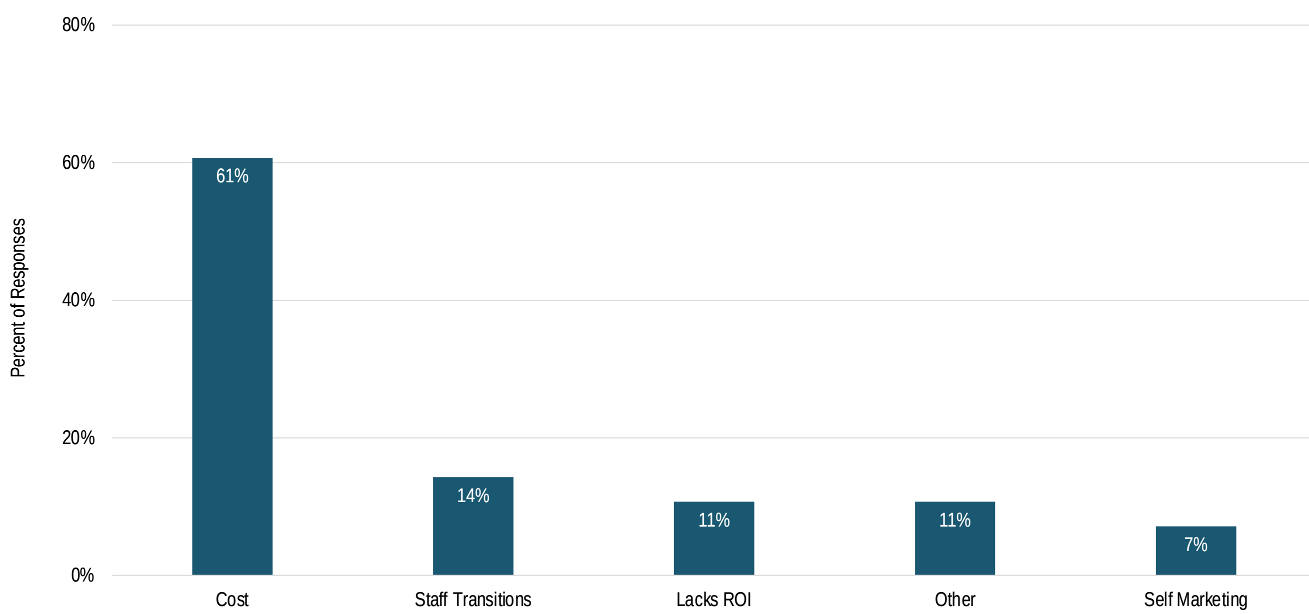


Figure 57 – Marketing Co-op: Reasons for Not Participating N=28

Are there any particular reasons why you don't currently participate in the Iowa Marketing Co-op Program?



What We Heard

Awareness:

"Workshops or video conferencing to provide more details and options."

Participation:

"Make a wider price range available for smaller organizations"

"Perhaps have a co-op marketing grant category so that if a few small communities want to create a joint regional ad campaign, they could apply for some matching funds?"

Quality/Perception:

"We're a small rural market that has never seen a huge upside in most of the collaborative ad buys we were aware of that were part of the co-op program."

"Results from previous years were not up to expectations."

"In regards to message consistency and branding, it seems we've gone backwards. Many of the recent print ads have looked less polished than in previous years."

"I have never really checked out what it would cost me to do this individually with each publication. Maybe a cost comparison would be nice; I use it more for the convenience of scheduling several publications at once."

"Really scrutinize our message and make sure it really aligns with the State goals, not just verify it looks good. I would rather know it before it goes to print and get an opportunity to change it."

"I would like to see a full-spectrum of potential travelers targeted in co-op advertising and not just those that are ideal for work force recruitment. Improved design and creative would be nice."

Marketing Co-op

SWOT Analysis

Strengths:
- Provides offset of advertising costs for partners
- Regular participants value and appreciate the program
- Moderate familiarity among survey participants

Weaknesses
- Low consistency in quality of imagery, messaging, content, or brand strategy from partners; marketing co-op program assets do not look or feel the same as the ITO brand and campaign strategies, yet use the state's brand badge.
- Variable consistency of campaign messaging in co-op program assets
- Inconsistent level of local/regional collaboration for greater economic impact
- Unclear regional competitive advantage in brand position and campaign delivery
- Key categories of marketing activity are noticeably absent: PR programs, media tours, FAM tours

Opportunities:
- Elevate and unify statewide brand: significant opportunity to strengthen the Iowa brand at the statewide level: more unified approach to brand consistency, impact, and strategy.
- Incentivize local/regional participation in umbrella brand approach
- Align Marketing Co-op strategy to advance the overall marketing strategy
- Focus more Co-op dollars on greater out-of-state marketing impact to offset the collectively high percentage of local partner dollars being spent on in-state marketing.
- Invest more in innovative offerings – help to push partners to select from programs that will be most impactful, cost-effective, and strategic
- Treat industry stakeholders as secondary marketing audience of the program:
    - Update and clarify statewide strategic objectives of Marketing Co-op to achieve statewide strategic brand and awareness goals
    - Devise new engagement and communication strategies to reach and include new potential partners and participants in programs.
    - Leverage success stories and advocacy through partner testimonials
    - Proactively report campaign performance as a sales tactic
    - Encourage participation by acknowledging and praising in public ways
- Incentivize collaboration in the application process to decrease dilution through micro-campaign, and unify/bolster clusters of smaller destinations
- Consider shifting program commitment timing to align with calendar year budgeting and planning (vs. state fiscal year)
- Incentivize strategic investment through access to insights and data (e.g. Arrivalist)
- Consider new or different co-op verticals: neighboring states offer a wider and/or different variety of co-op program options (Figure 58- Marketing Co-op Program comparison)

Threats

- Brand dilution and brand confusion within target audiences may result from the use of state brand badge when state's brand is intermixed with a wide and disparate application of local partner content and messaging
- Relatively low stakeholder budgets make it difficult to offer scalable, impactful and strategic shared-cost marketing co-op programs
- While awareness of the program is relatively high, potential partners have variable perceptions about the strategic value of and return on investment for program participation by potential partners.

Figure 58 – Marketing Co-op Program Comparison

	IA	NE	MI	WI
Print ads packages	X			X
Digital display ads	X			
OOH packages	X			X
Social media program	X	X	X	X
Leads program	X	X		
.com banner ads	X	X		X
e-newsletter/email marketing	X	X	X	X
Sponsored Listings	X	X		
Arrivalist data program	X			X
PR Influencer Program	X			X
Visitor Guide (print)	X	X	X	X
Deals program			X	X
Custom email program				X
Sponsored Articles				X
SEM				X
Radio on-air feature			X	X
Regional TV advertising units			X	
PR Group Media Fam trips				X
PR Group Mentorship				X
PR Press Kit Program				X
PR In-market Desksides			X	X
Welcome Center special event			X	

Regional Sports Authority District program (RSAD)

Program Summary

"Promote tourism in Iowa by funding projects that relate to the active promotion of nonprofessional sporting events in the state.

Applicants must be a convention & visitors bureau. A seven-member board must govern the proposed RSAD. The board must have at least three city council members of a city located within the proposed district.

RSAD awards are $50,000 and require a 50% cash match. Up to ten districts can be certified per grant cycle."

RSAD
Survey Overview

Not a very familiar program with the survey respondent group, with 48% reporting they have never heard of the program, including 36% of DMOs. Most respondents have never participated. Many feel it is very specific to larger cities that have sports teams due to the size of the funding match required. Most stakeholders report the program is not applicable to their organization or believe they are not eligible for the program.

Figure 59 – RSAD Program Familiarity and Participation N=99, N=53

What is your level of familiarity with the RSAD Program?

What is your level of participation with the RSAD Program?

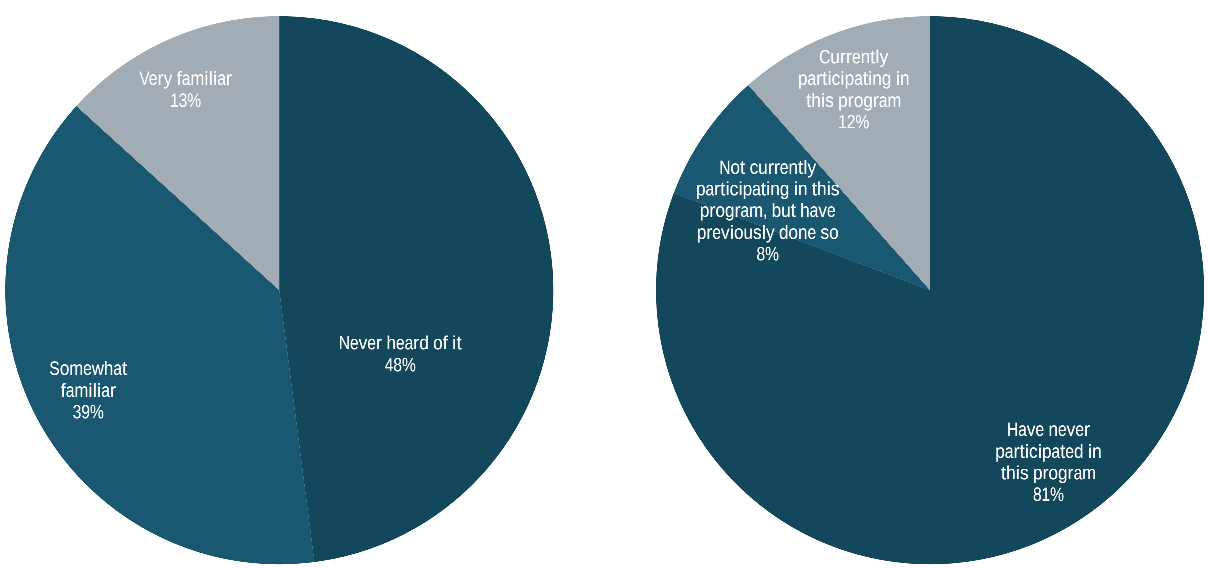
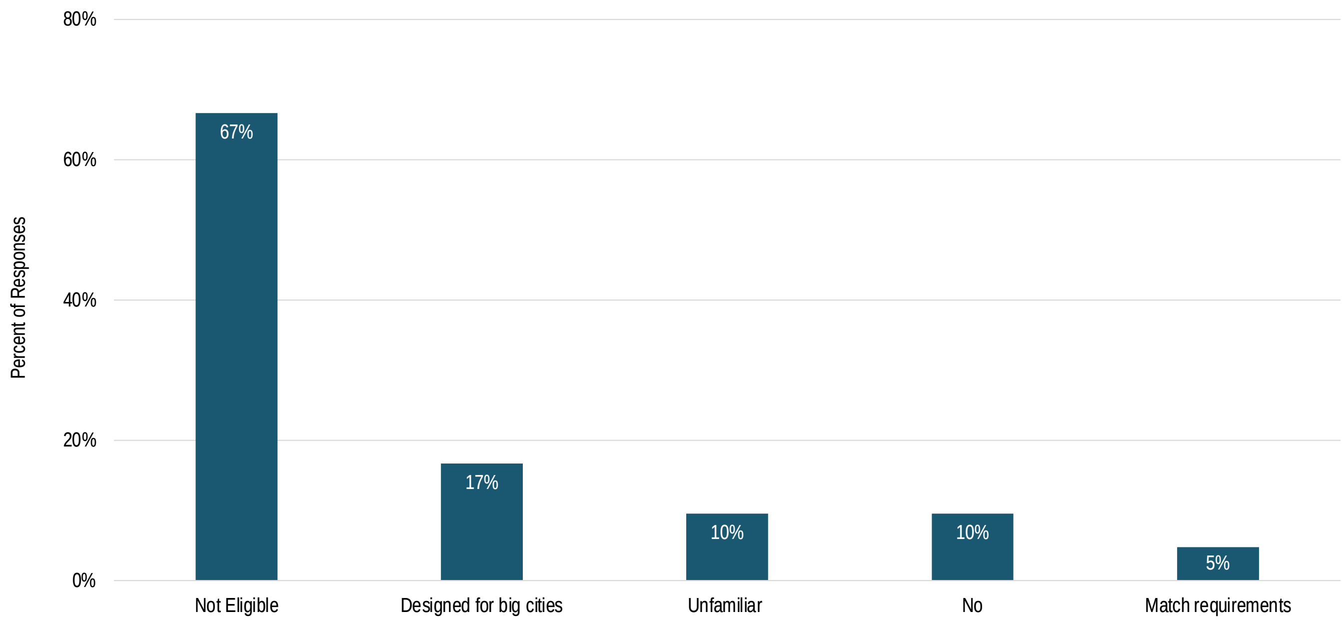


Figure 60 – RSAD: Reasons for Never Participating N=42

Are there any particular reasons why you've never participated in the Regional Sports Authority District Program?



What We Heard

"The minimum funding level of $75,000 is too high for the events we are recruiting."

"We are not large enough to qualify. That needs to change."

"More strict guidelines make this grant program harder for us to utilize."

Community Attraction and Tourism (CAT)

Program Summary

"The CAT program assists projects that will provide recreational, cultural, entertainment, and educational attractions. The project must be available to the general public for public use and be primarily vertical infrastructure. At least 65% of the funds must be raised prior to submitting an application.

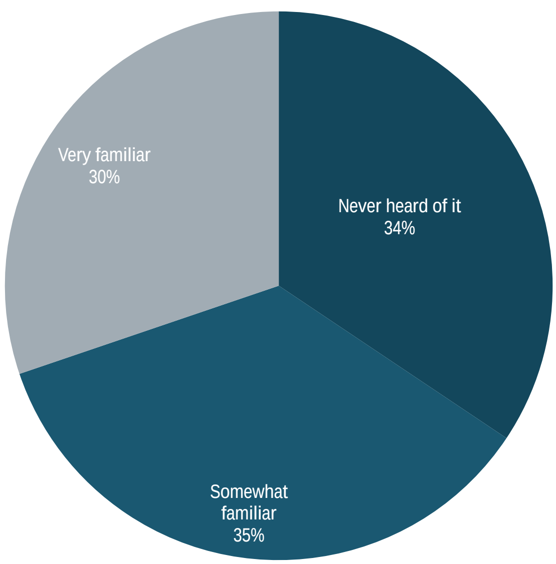
The CAT application calls for a broad base of funding sources, which has been interpreted as requiring cash contributions from the city, county, and private sources. Up to 25% of the local match can be made up of donated labor and materials (in-kind contributions)."

CAT Survey Overview

Respondents are somewhat familiar with this program (65% are somewhat or very familiar); however, very few respondents are currently participating and 44% of respondents have never participated. The biggest reported barriers to participation are the perceived lack of fit to their organization's needs (26%) and the application process (26%), which many feel is too cumbersome and not worth the effort for the funds being received. A lot of projects also don't fit the criteria of the grant.

Figure 61 – CAT Program Familiarity and Participation   N=97, N=64

What is your level of familiarity with the CAT Program?



What is your level of participation with the CAT Program?

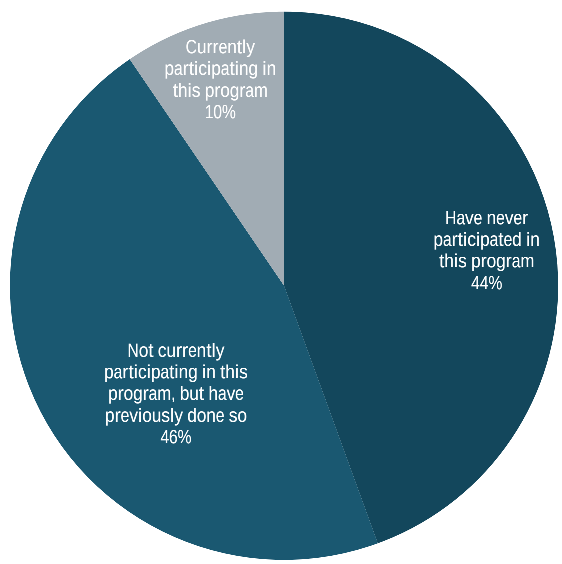
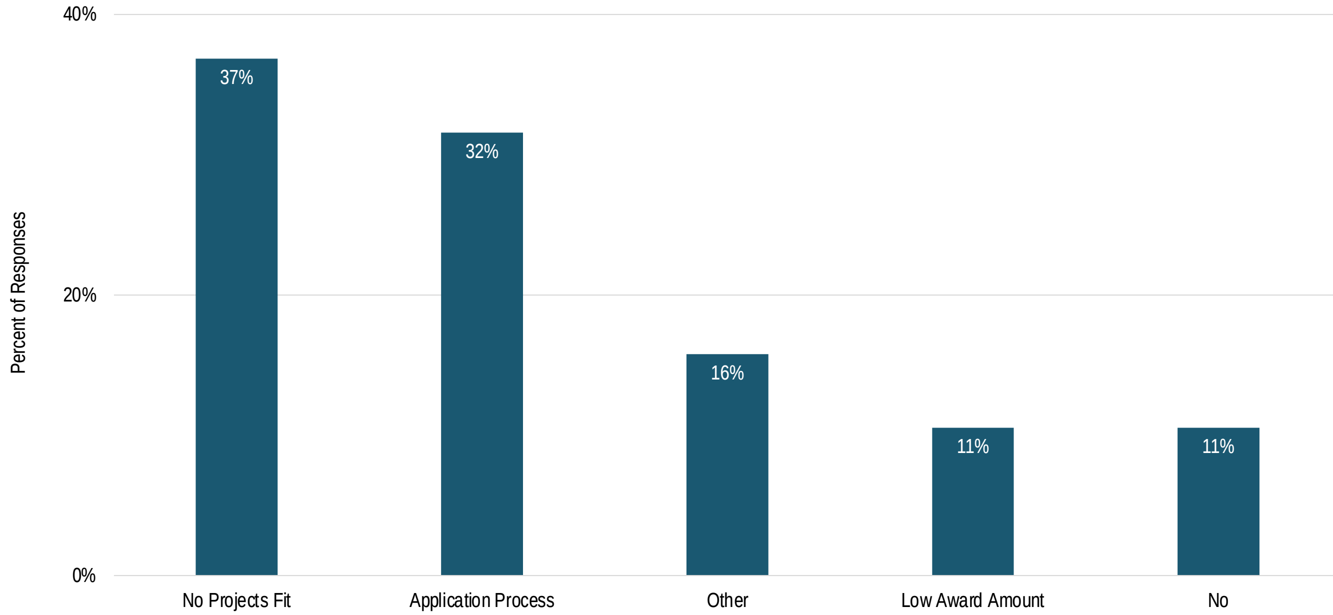


Figure 62 – CAT: Reasons for not Participating   N=19

Are there any particular reasons why you don't currently participate in the Community Attraction and Tourism Program?



What We Heard

"It is a very heavy lift for a small community put the application together let alone to get all of the funding commitments finalized without having started the project."

"Didn't want to complete the long application for the amount of funds we would be able to receive."

"It would be beneficial if the award amount would be higher, since it is the last dollar in. Most of the time the need to complete a project has tapped local sources and needs additional funding to finalize the project. This would be helpful for the CAT Grant to consider as the last dollar in more on completing a project once local funding has been exhausted."

River Enhancement & Community Attraction and Tourism (RECAT)

Program Summary

"The River Enhancement Community Attraction and Tourism program (RECAT) is designed to assist communities in the development and creation of multiple purpose attraction or tourism facilities. This program can help position a community to take advantage of economic development opportunities in tourism and strengthen a community's competitiveness as a place to work and live.

Eligible projects create recreational and entertainment attractions that are open to the general public and relate to, connect with, and enhance a river, lake, or river corridor. Projects must be located within a city. Eligible applicants include a city, county, public organization, or school district in cooperation with a city or county.

Up to one-third of the total project cost can be requested from RECAT."

This program is not currently funded; however, we explored familiarity and perceptions of this program through the stakeholder survey.

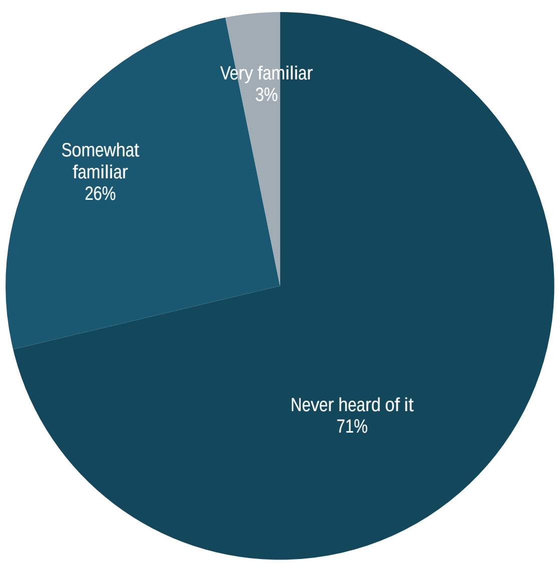
Survey Overview

Most stakeholders had never heard of this program (71%) and have never participated in it (81%). Many felt this was very specific to certain destinations and not applicable to them (59%).

"It is an extensive process to participate and doesn't always fit within project timelines."

Figure 63 – RECAT Program Familiarity and Participation   N=95, N=27

What is your level of familiarity with the RECAT Program?



What is your level of participation with the RECAT Program?

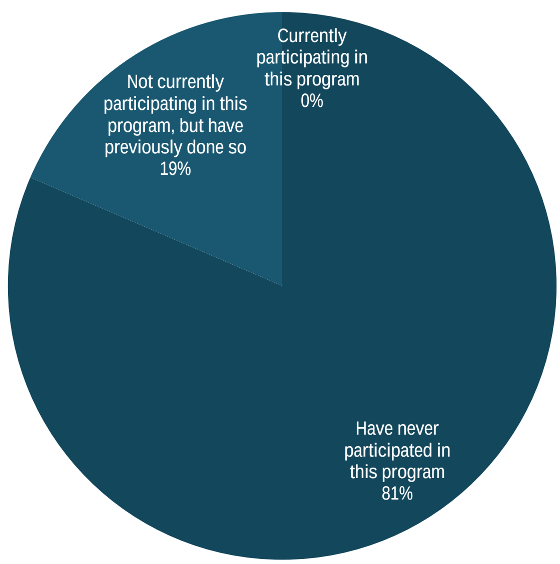
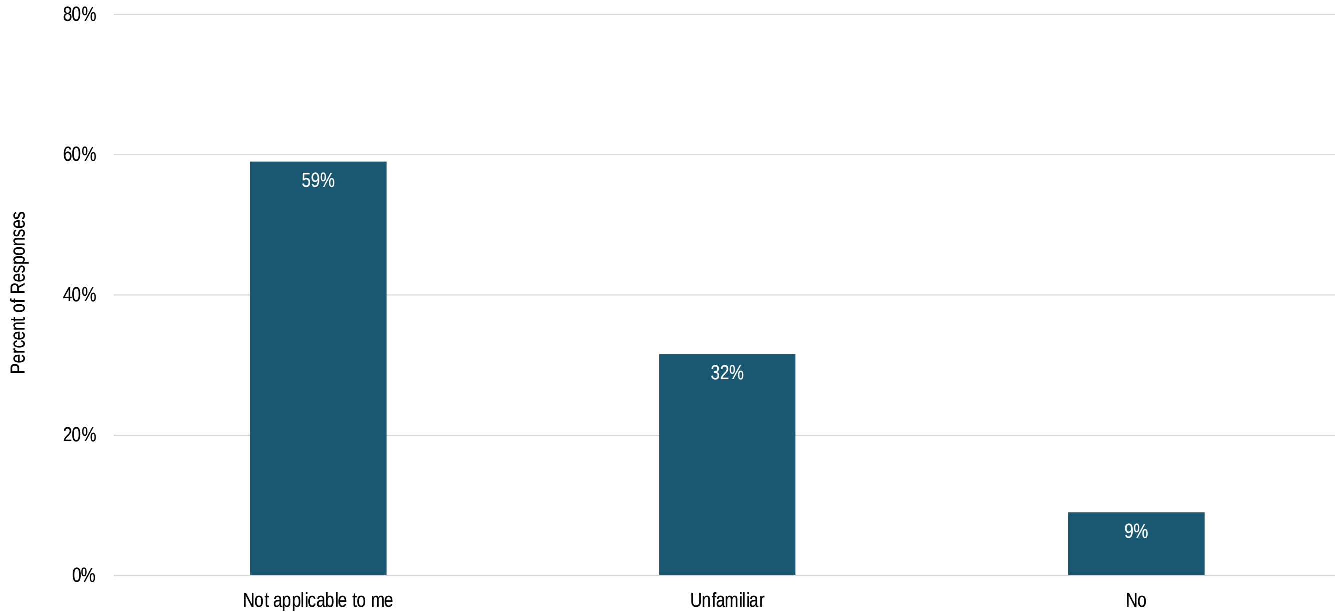


Figure 64 – RECAT: Reasons for Never Participating   N=22

Are there any particular reasons why you've never participated in the River Enhancement Community Attraction & Tourism Program?



Great Places Initiative

Program Summary

“The program provides designation and supports the development of new and existing infrastructure intended to cultivate the unique and authentic cultural qualities of neighborhoods, communities, and regions in Iowa…focused on funding/support in the following areas:

- Arts and Culture
- Architecture
- Diversity
- Entrepreneurial Incentive for Business Development
- Historic Fabric
- Housing Options
- Natural Environment
- Amenities

This program is administered by the Iowa Arts Council/Department of Cultural Affairs.

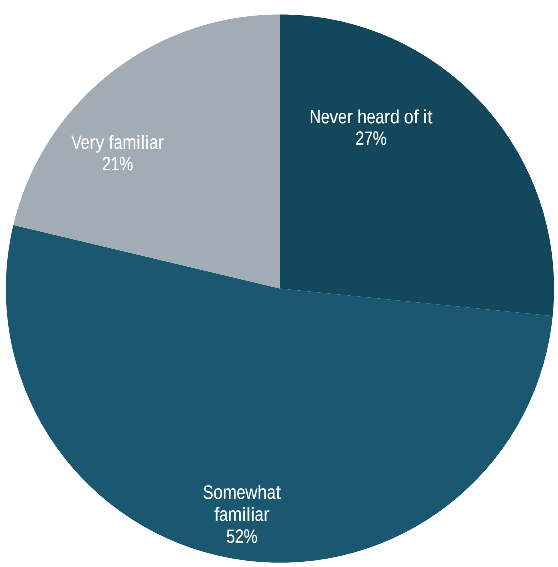
Great Places Initiative

Survey Overview

The Great Places Initiative is a somewhat familiar program for respondents, although over a quarter (26%) have never heard of it. Most have not participated in the program. There seems to be confusion around who has access to this program, as many felt it was not applicable to them. The process was also considered to be confusing.

Figure 65 – Great Places Initiative Familiarity and Participation   N=95, N=70

What is your level of familiarity with the Great Places Initiative?



What is your level of participation with the Great Places Initiative?

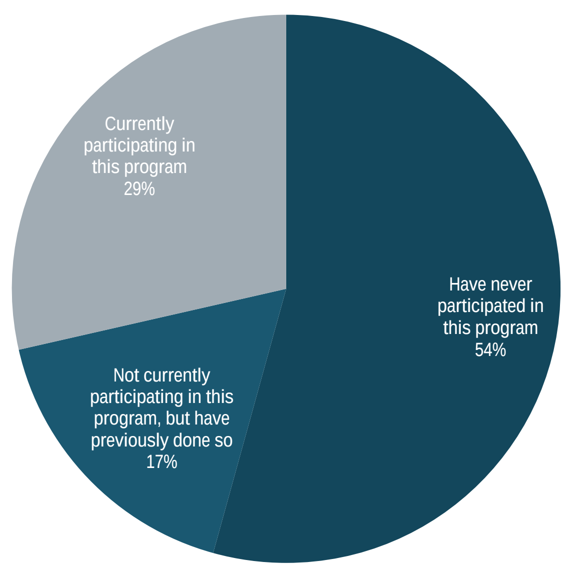
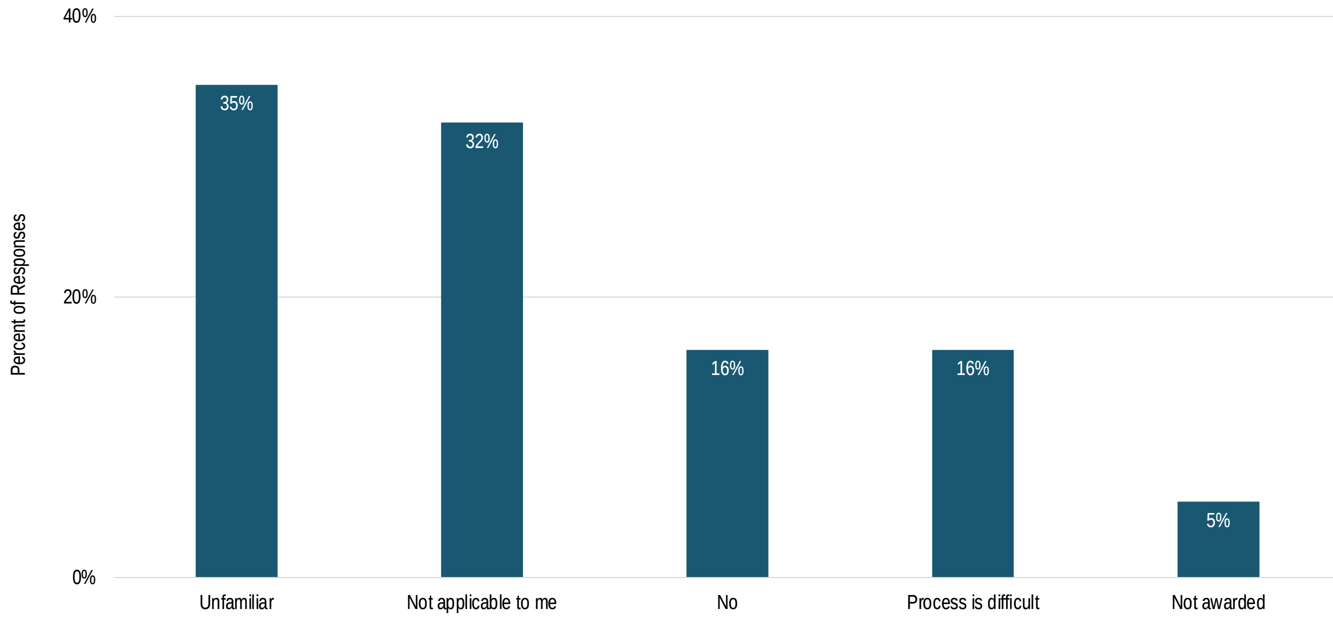


Figure 66 – Great Places Initiative: Reasons for Never Participating   N=37

Are there any particular reasons why you've never participated in the Great Places Initiative?



What We Heard

"I have heard the application process is arduous."

"Once again we don't know much about it. Years ago, the process was cumbersome so have not pursued it in the past 10 years or so."

"I have "heard" of it, but when I get done with the survey I am going to google it. Not completely sure what it is about."

"We were told at the beginning we were already a great place and not eligible. Program implies that some communities are great and the rest are not. Bad marketing messaging. All communities should be provided resources and technical assistance."

"Considering applying to Great Places. I feel that it is a very heavy lift and am concerned we will be denied because another institution has that designation nearby."

Summarized Stakeholder Commentary for Consolidated Program Offering

Respondents were asked to provide open-ended comments or suggestions for how to improve or expand the overall offering of existing programs to support the tourism industry. The responses below are verbatim as submitted and are categorized into marketing-related, grants-related and other topics, below.

Marketing

- “Digital / Social campaigns”
- “We did pull up banners for events and attractions and moved them throughout the communities and county to promote the events. This was helpful for both locals and visitors.”
- “Being at the State Fair”
- “Bus tour groups is something that is needed to come at NE Iowa.”
- “Tiktok ads”
- “I'd like to see more emphasis on Madison/Chicago markets. Even just one opportunity in each location.”
- “Social media influencers”
- “I would just like to see it all together under one umbrella.”
- “The truck wraps are intriguing. Thinking about billboards and better signing, especially as travelers pass through our state.”
- “wrapped soda machines, food truck to take Iowa food/beverage products to event in neighboring states, grants for 24/7 info kiosks, grant for wayfinding, coop sport show booth or major Iowa events booth.”
- “If the Iowa Tourism office could work with the airlines to utilize scripts for 'Welcome to Iowa' for when visitors first arrive to Iowa, that would be awesome. Iowa communities are such welcoming/friendly communities compared to the rest of the US and World and I think it would be amazing if we could carry that into the stewardesses who first welcome them to Iowa. Additionally, if we could have simply Iowa welcome guides placed in the airlines that land at airports in Iowa, that would be a great way to provide an overview of places to visit in Iowa when they might they're we're just a flyover state.”
- “I would like to see us back in Preservation Magazine.”
- “Assistance for rural communities to do co-ops on a smaller scale.”

Grants

- “Greater amount of grant funds made available will help to make a larger impact and further reach.”
- “Large-capacity grant programs to assist with infrastructure that has a significant impact on the community. For example, community use required.”
- “Enabling applications for assistance in providing new murals and maintenance of the existing murals is the sole purpose of the Rock Rapids Mural Society.”
- “Grant programs specific to advertising placement.”
- “Grant programs - technology equipment”
- “Take the money you spend on the travel guide and give as grants.”
- “Setting up grants for very small budgets. Maybe those who have under $2,000/yr for advertising. Small places can't afford to compete or reach the minimum co pay.”

Other

- “Need a better connection with attractions that draw younger folks.”
- “Pay closer attention to attractions. They are the drivers, NOT the CVBs and DMOs. It is the small town and the people of those towns who make Iowa what it is. When DSM has large events, they draw from the whole State, not just the metro regions. Same for Iowa City, Ames, Dubuque and Council Bluffs. Without the small towns, Iowa would be dead.”
- “Small towns need help.”
- “Don't know if it fits here, but I would like for Iowa Tourism to consider including the Equestrian Tourism target market. With all the Equestrian Campgrounds, we bring in so many from surrounding states and we don't have anything in our promotional materials.”

Appendix One: Stakeholder Survey

Appendix 1.1 – Iowa's Brand   N=516

What three words do you believe describe Iowa's brand as a destination?

Appendix 1.2 – Iowa's Net Promoter Score (NPS)   N=549

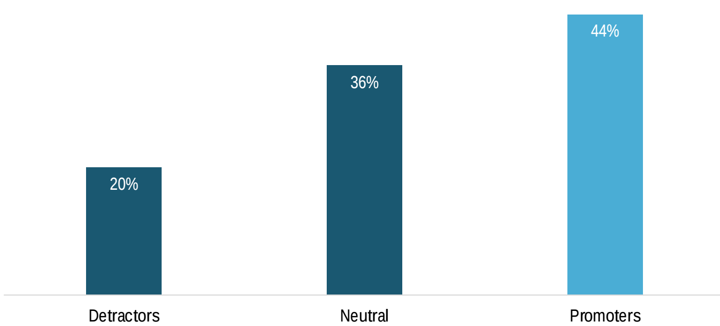
How likely is it that you would recommend Iowa as a destination to visit to a friend or colleague?

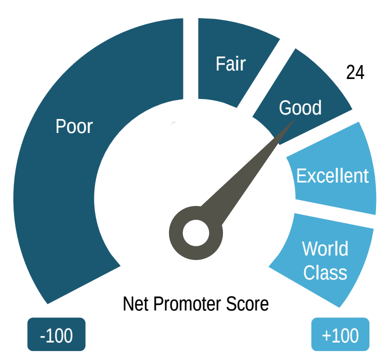
1	2	3	4	5	6	7	8	9	10
Detractors						Neutral		Promoters	

NPS = % of Promoters - % of Detractors

The NPS measures the likelihood of those surveyed to promote the destination as a place to visit. Score ranges from -100 to 100 with a score of 0 to 10 considered fair, 10 to 30 good, 30 to 50 excellent and 50+ world class.

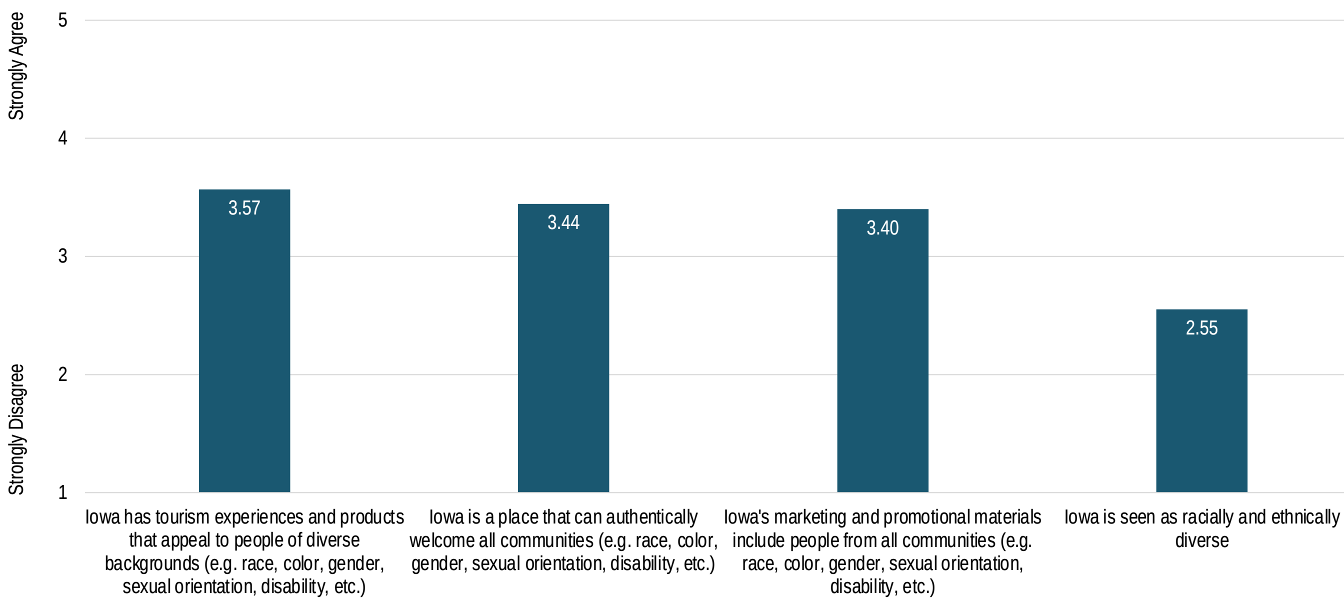
Iowa has a good NPS of 24 with 44% of stakeholders surveyed being promoters of the organization and 20% being detractors.





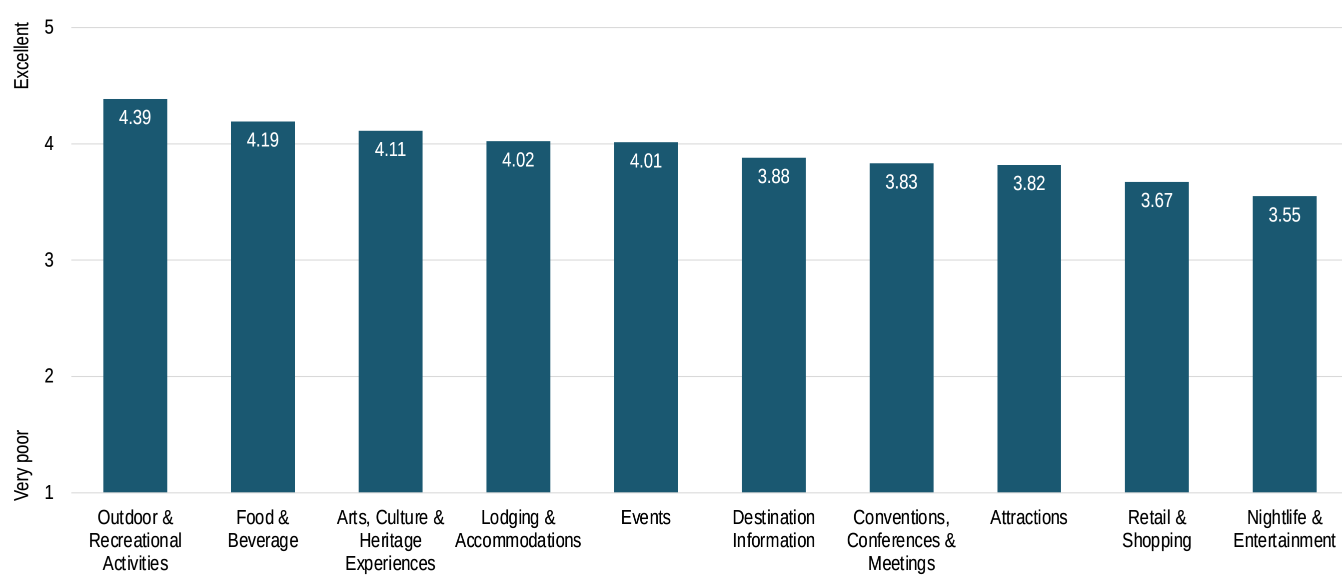
Appendix 1.3 – Iowa's Reputation as Welcoming to All N=536

Please select your level of agreement with each statement:



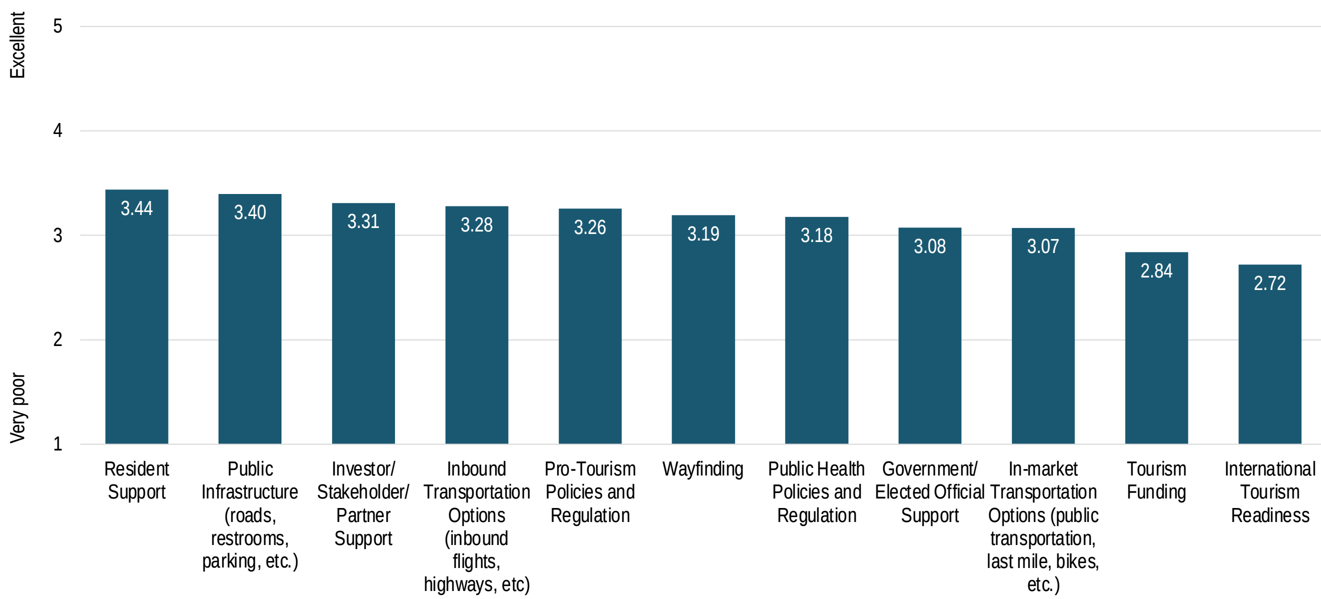
Appendix 1.4 – Tourism Drivers, Assets, and Experiences N=540

Please rate your perception of the quality of each area of Iowa's tourism offering:



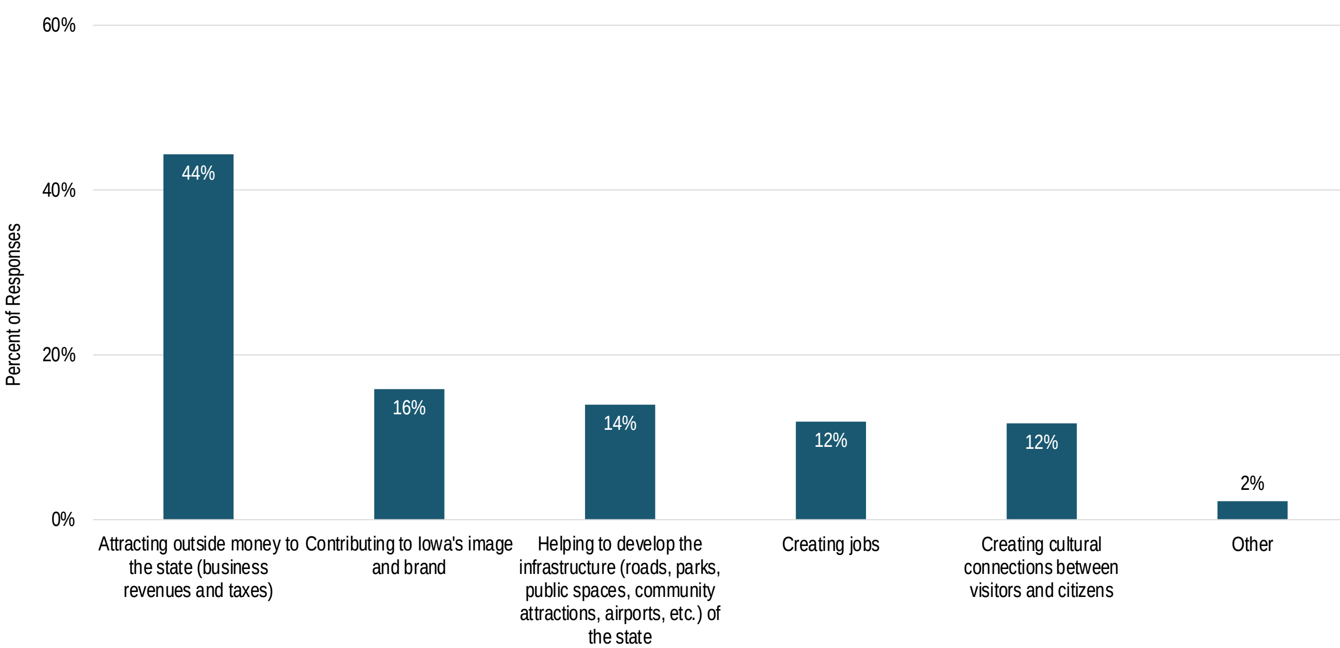
Appendix 1.5 – Tourism Supports and Enablers   N=515

Please rate your perception of the quality of each area of Iowa's tourism support structure:



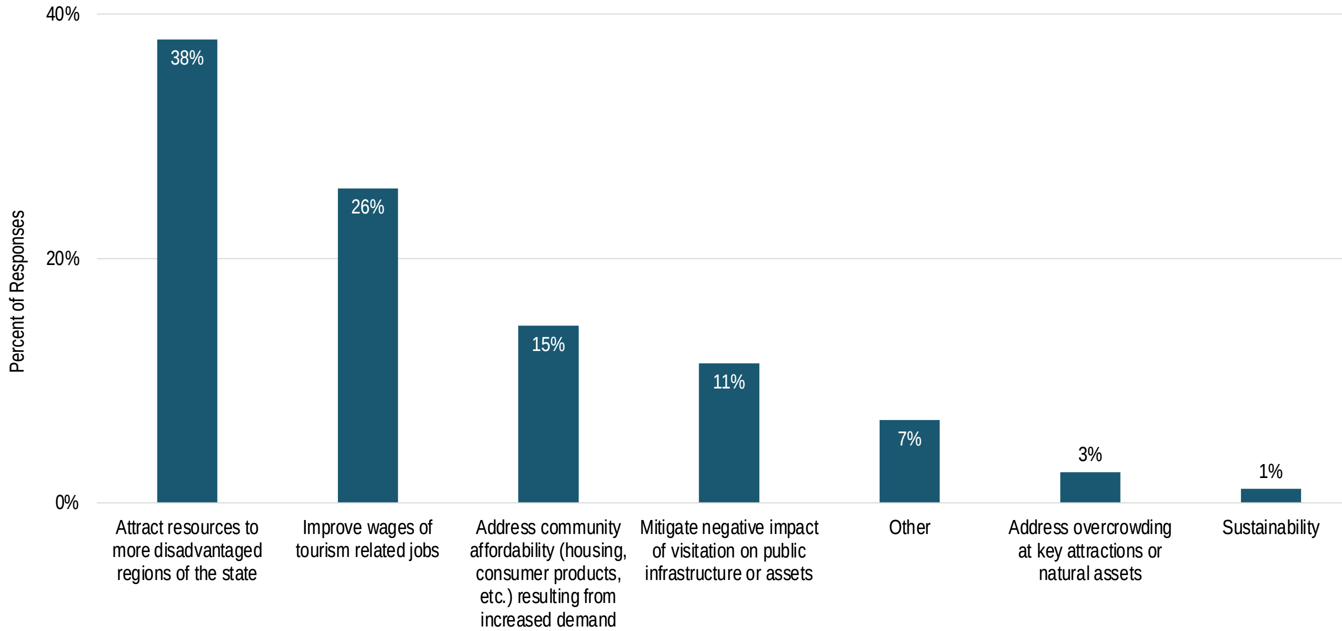
Appendix 1.6 – Economic Impact Importance   N=530

What is the most important impact tourism has on Iowa's overall economic health?



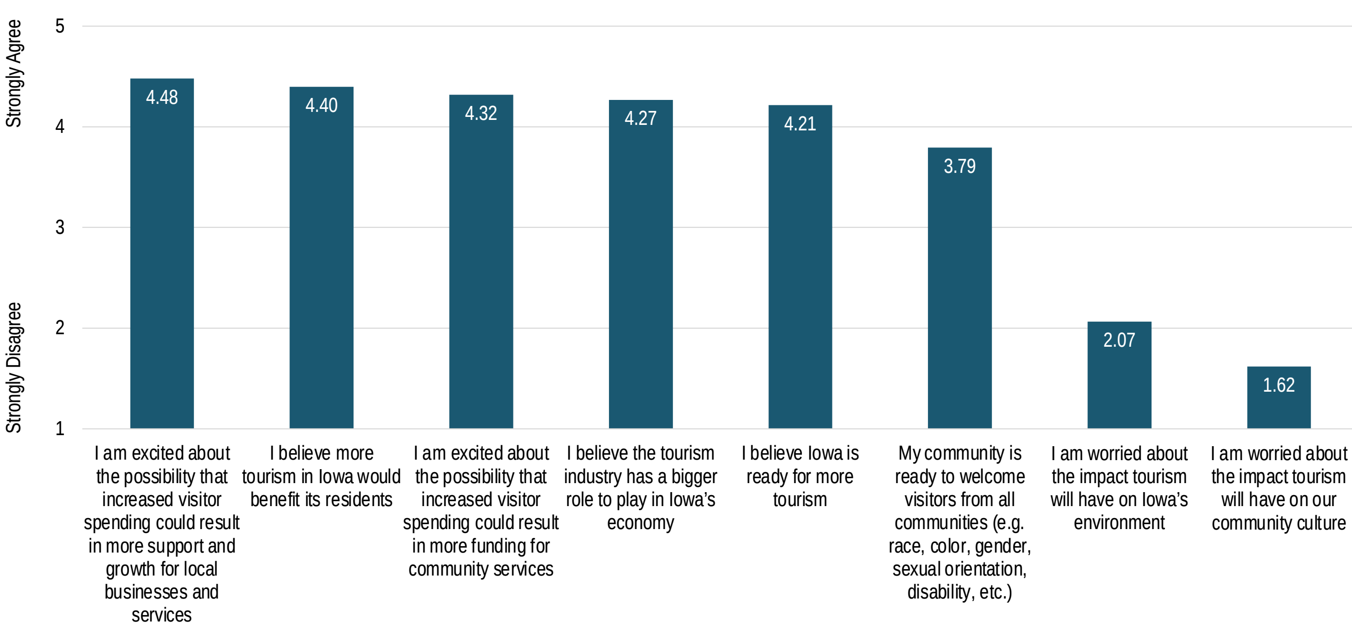
Appendix 1.7 – Most Important Economic Impact to Address   N=517

What is most important for the Iowa tourism industry to address in its Strategic Plan as it relates to tourism impact on Iowa's overall economic health?



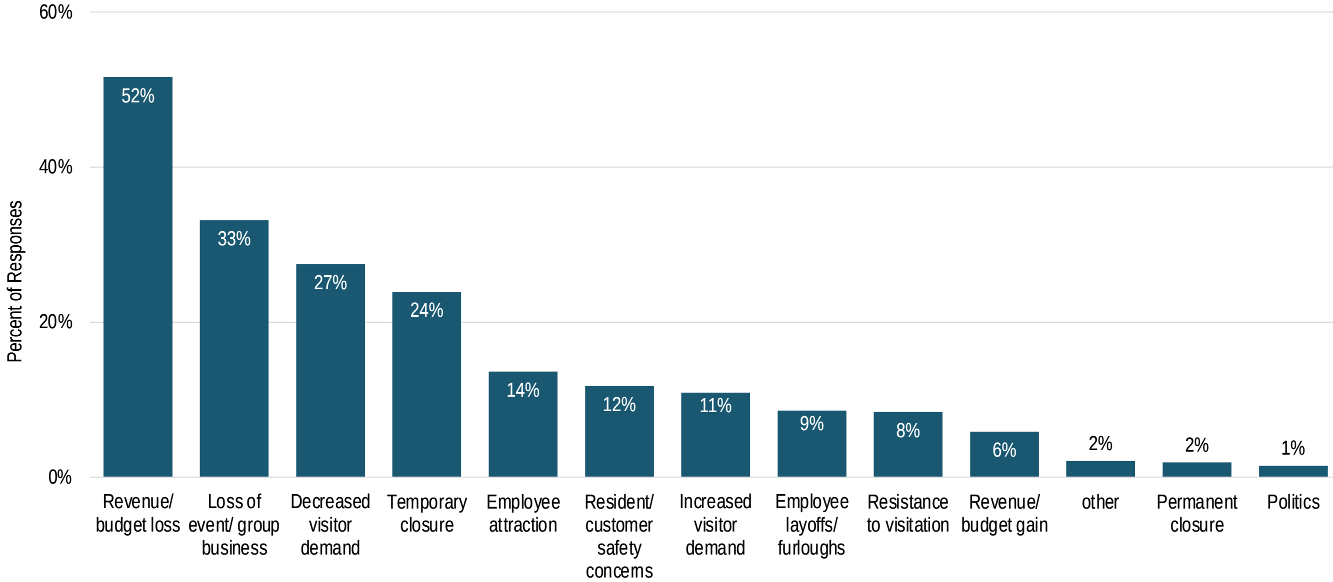
Appendix 1.8 – Tourism Opinions   N=536

Please select your level of agreement with each statement:



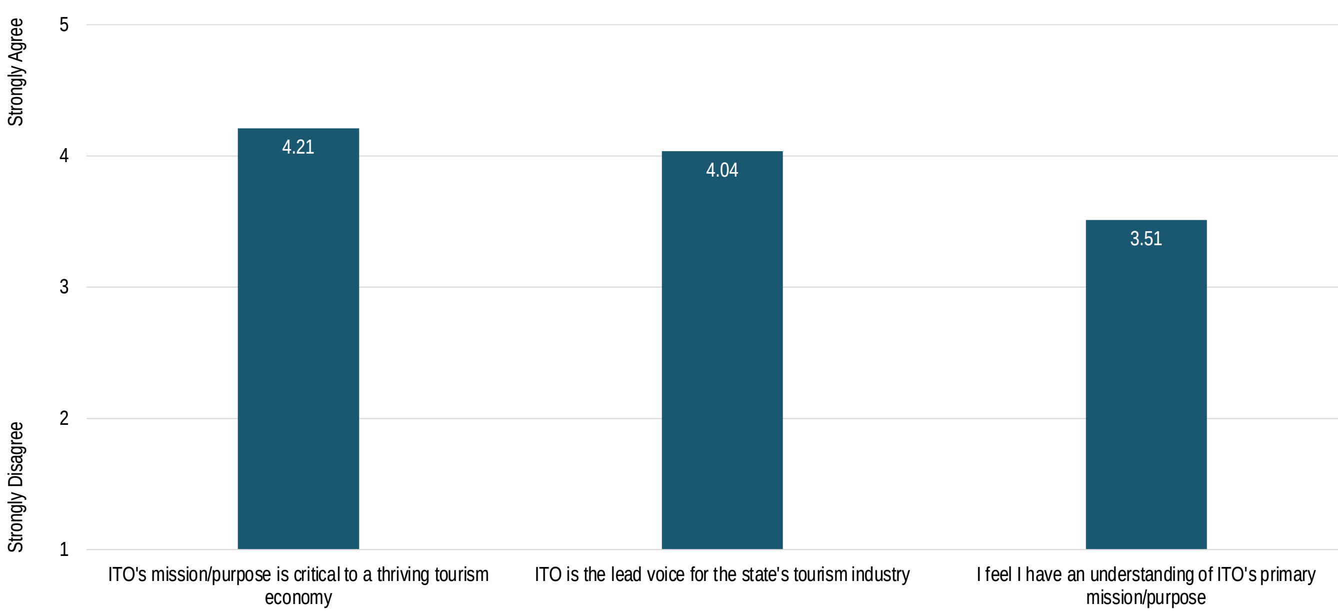
Appendix 1.9 – COVID-19 Impacts   N=477

What are the biggest impacts your business/organization has experienced as a result of the COVID-19 pandemic?



Appendix 1.10 – Mission   N=428

Please select your level of agreement with each statement:



Appendix 1.11– ITO's Reputation   N=297

What three words do you believe best describe ITO's reputation in the state?

Appendix 1.12 – ITO's Net Promoter Score (NPS)   N=435

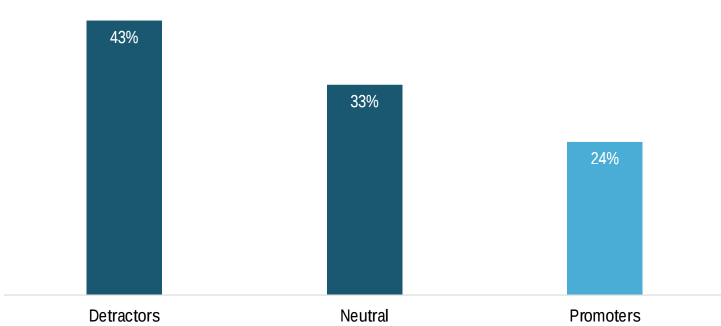
How likely is it that you would recommend ITO to a friend or colleague?

1	2	3	4	5	6	7	8	9	10
Detractors						Neutral		Promoters	

NPS = % of Promoters - % of Detractors

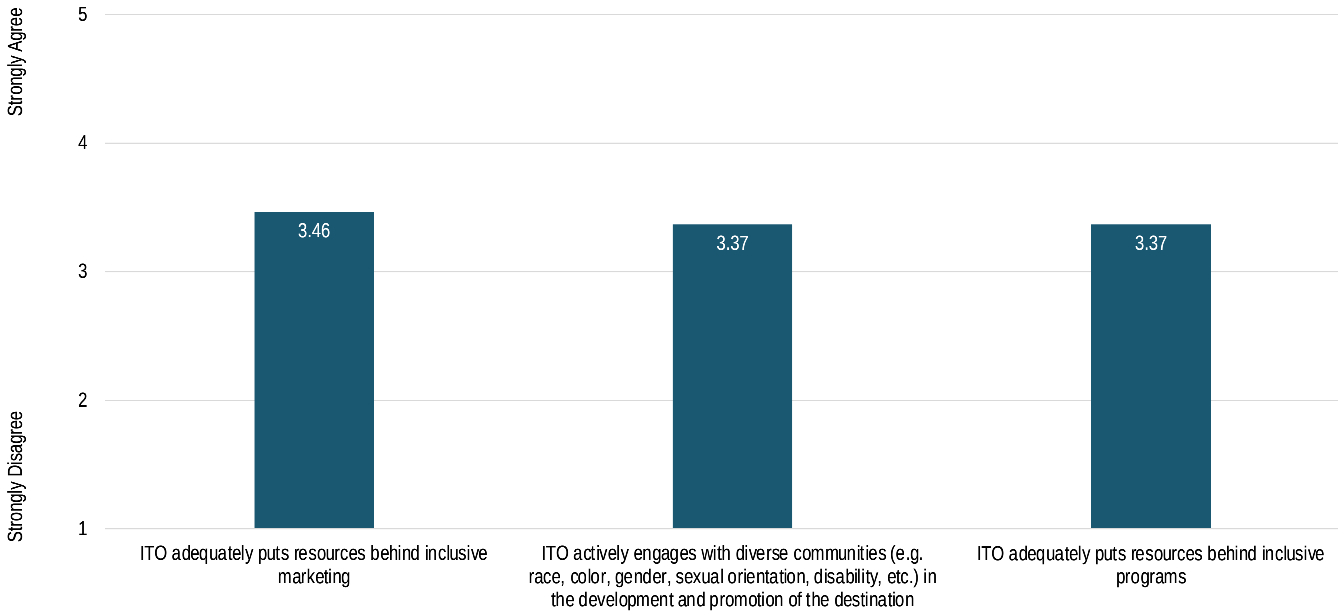
The NPS measures ITO's reputation and if it's stakeholders would recommend the organization to others. Score ranges from -100 to 100 with a score of 0 to 10 considered fair, 10 to 30 good, 30 to 50 excellent and 50+ world class.

ITO has a poor NPS of -19 with 43% of stakeholders surveyed being detractors of the organization and 24% being promoters.



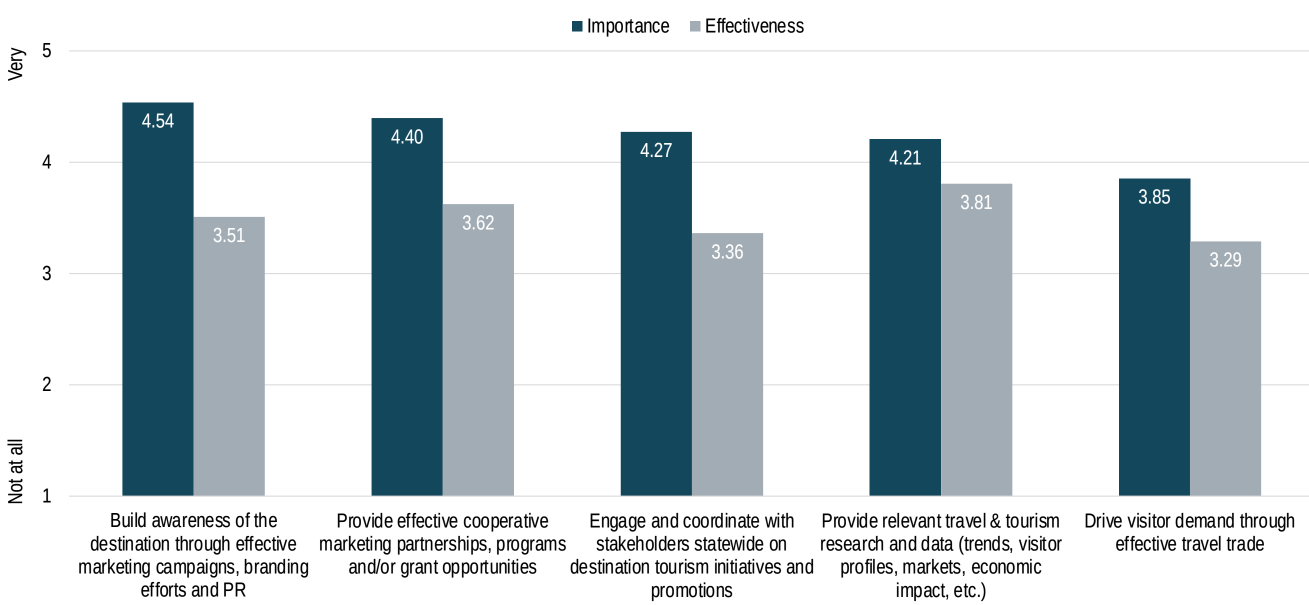
Appendix 1.13 – ITO's Commitment to Inclusiveness N=300

Please select your level of agreement with each statement:



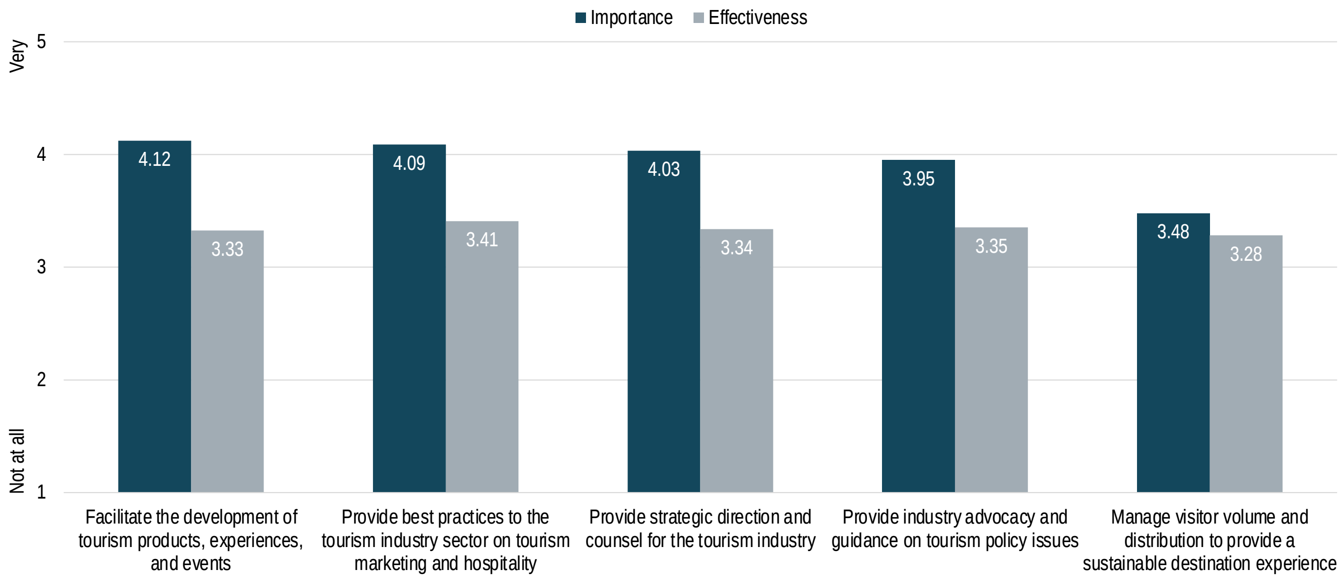
Appendix 1.14 – Destination Marketing Roles N=364

Please rank how important and effective the following destination marketing roles are to you and the success of Iowa as a destination:



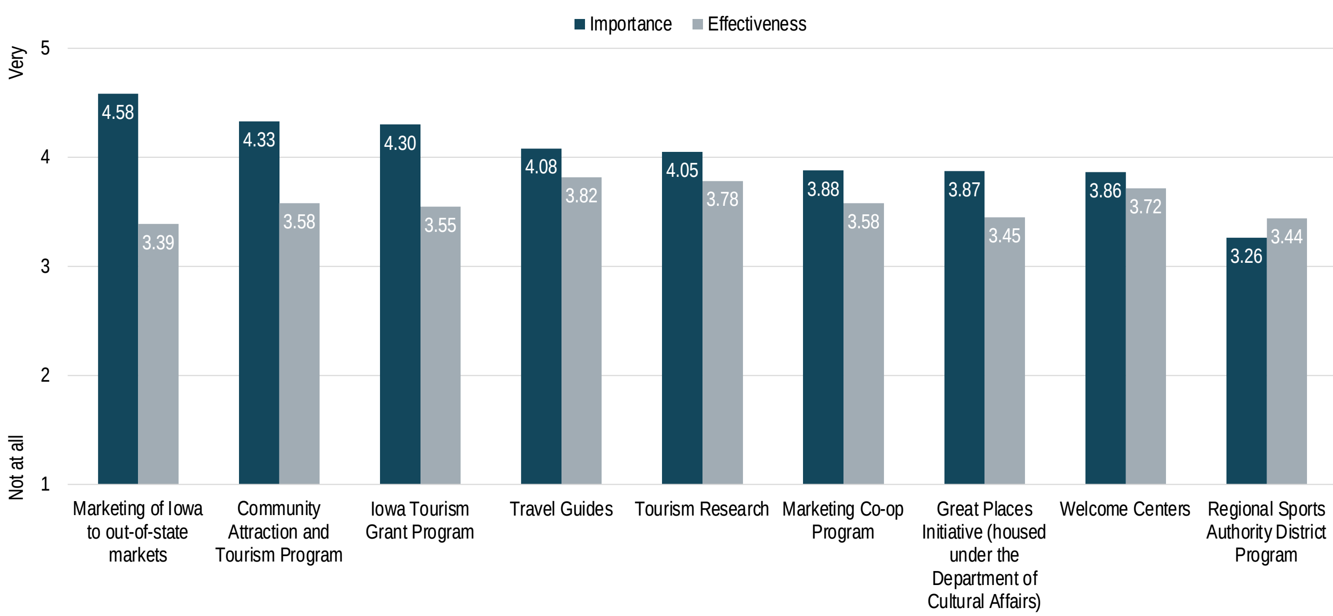
Appendix 1.15 – Destination Management Roles N=343

Please rank how important and effective the following destination management roles are to you and the success of Iowa as a destination.



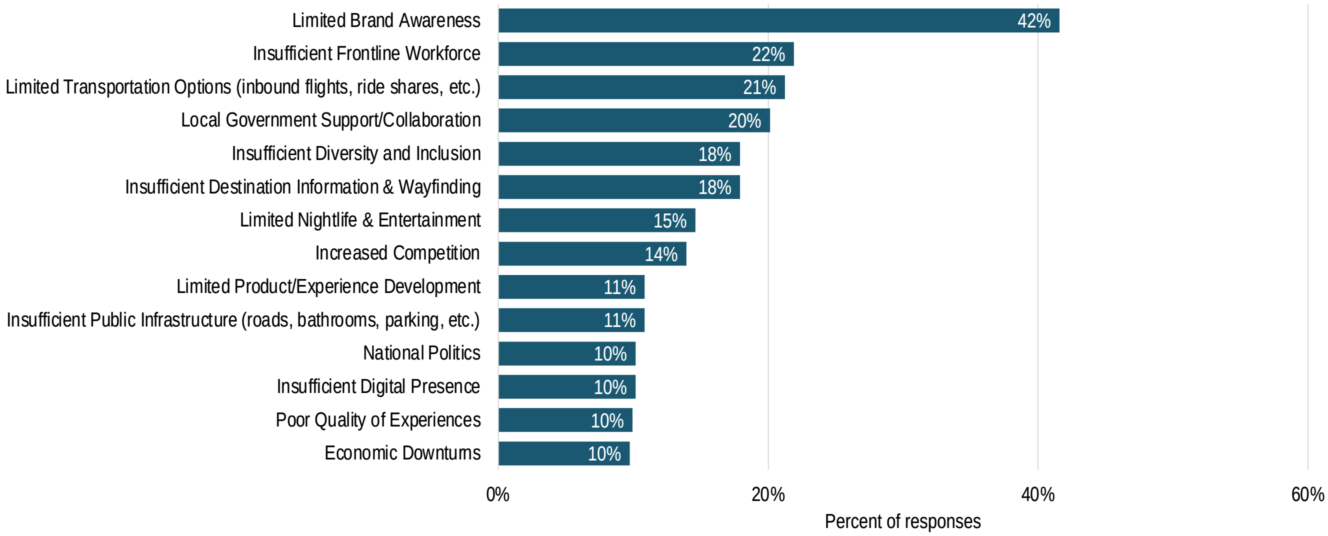
Appendix 1.16 – Programs N=346

Thinking about the Iowa Tourism Office's programs, how would you rate the importance and effectiveness of the following:



Appendix 1.17 – Top Threats   N=452

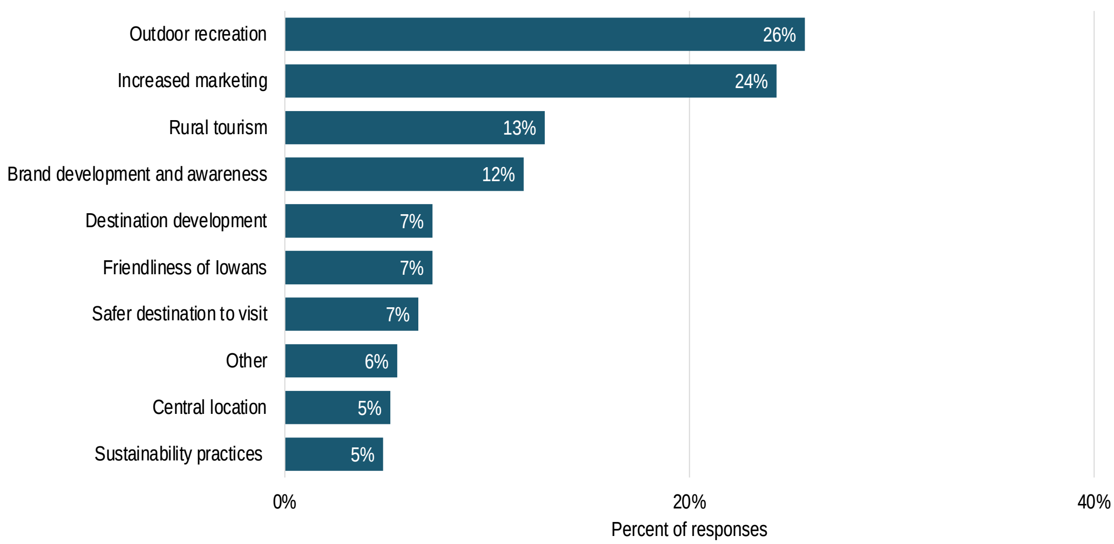
Aside from COVID-19, what do you believe are the top three threats or challenges facing Iowa as a destination?



Note: Only top threats shown (10% or higher). Other threats identified included: limited shopping and retail, workforce housing, shifting travel patterns, limited lodging, resident/community resistance, climate change, limited dining, public health threats, homesharing, safety concerns, pollution and overtourism.

Appendix 1.18 – Top Ten Opportunities   N=288

What do you believe is the greatest strategic opportunity for Iowa as a destination?



Note: Based on open-ended responses. Only top ten opportunities shown (5% or higher). Other opportunities identified included: agritourism, historical tourism, improved collaboration, being welcoming to all, culinary tourism, diversity of assets, quality of life, affordability, state fairs, arts, attracting younger visitors, politics, transportation, resident education and addressing workforce shortage.

Footnotes

1. https://www.tripsavvy.com/outdoor-activity-increase-during-pandemic-5183833
2. https://outdoorindustry.org/article/increase-outdoor-activities-due-covid-19/
3. https://www.marketplace.org/2020/11/13/2019-was-good-year-for-outdoor-economy-what-about-2020/
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5. https://www.mckinsey.com/industries/travel-logistics-and-transport-infrastructure/our-insights/covid-19-tourism-spend-recovery-in-numbers#
6. https://news.airbnb.com/wp-content/uploads/sites/4/2021/05/Airbnb-Report-on-Travel-Living.pdf
7. https://news.airbnb.com/wp-content/uploads/sites/4/2021/05/Airbnb-Report-on-Travel-Living.pdf
8. https://www.ustravel.org/toolkit/covid-19-travel-industry-research
9. https://www.nytimes.com/2021/08/03/business/marriott-earnings-tourism-rebound.html
10. https://www.kake.com/story/44400617/boeing-returns-to-profitability-drops-layoff-plans
11. https://www.nytimes.com/2021/07/27/travel/black-travelers-diversity-inclusion.html
12. https://www.fodors.com/news/news/heres-how-the-travel-industry-can-take-the-lead-in-fighting-asian-hate
13. https://industry.traveloregon.com/opportunities/events/conferences/oregon-governors-conference-on-tourism/bipoc-diversity-in-travel-consensus/
14. https://journals.sagepub.com/doi/10.1177/2053168017738632
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17. https://www.npr.org/2021/06/29/1011253354/california-bans-state-travel-to-florida-and-4-other-states-lgbtq
18. https://longwoods-intl.com/news-press-release/covid-19-travel-sentiment-study-wave-43
19. https://www.ustravel.org/research/travel-recovery-insights-dashboard
20. https://www.mckinsey.com/industries/travel-logistics-and-transport-infrastructure/our-insights/covid-19-tourism-spend-recovery-in-numbers#
21. https://www.ustravel.org/system/files/media_root/document/Research_Travel-Forecast_Summary-Table.pdf
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23. https://www.brookings.edu/research/millennials/#:~:text=The%20millennial%20generation%2C%20over%2075%20million%20strong%20is,and%20almost%20two-fifths%20of%20the%20working%20age%20population
24. https://www.brookings.edu/blog/the-avenue/2020/07/30/now-more-than-half-of-americans-are-millennials-or-younger/
25. Skift Megatrends 2025
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30. https://www.cnbc.com/select/buy-now-pay-later-for-travel-what-to-know-/
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41. https://www.forbes.com/advisor/travel-rewards/car-rental-prices-are-up-what-are-the-alternatives/
42. Economic Impacts of Visitors in Iowa 2020 – Tourism Economics