State of the Iowa Travel Industry Report

<u>Final</u> Aggregate Findings – May 3, 2023

Research conducted by:
University of Northern Iowa
Business & Community Services
Institute for Decision Making | Strategic Marketing Services

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Project Design Overview

Project Objective

The purpose of the project is for Strategic Marketing Services (SMS), the Institute for Decision Making (IDM), and other appropriate programs in UNI's Business & Community Services to assist the Travel Iowa program at the Iowa Economic Development Authority, Iowa Travel Industry Partners (iTIP), and their tourism industry partners by developing, implementing, collecting and analyzing data for a "State of the Iowa Travel Industry" report, a travel organization staffing and budget report, and a statewide travel asset inventory.

Project Design

SMS-IDM worked with the IEDA team and their partners to develop the content of an online survey instrument and program the survey for online deployment with the goal of keeping the duration of the online survey to a maximum of 15 minutes. The IEDA had final approval authority for survey content and was invited to thoroughly test the online instrument before the recruitment process began. Topics covered included: Overall Perception of Tourism, Marketing Budget, Total Marketing Staff, State Resource Awareness & Utilization, Unmet Needs, Current Utilization of Resources, Advocacy Needs/Priorities, and Respondent Demographics.

SMS-IDM and the IDEA worked with partner organizations to promote/distribute the survey among Iowa tourism industry organizations and partners. More specifically, IEDA and iTIP emailed invitations to members and other contacts, as well as social media posts. The survey was launched on Wednesday, February 8, 2023 and was closed on Monday, March 13, 2023. A total of 545 businesses and organizations completed the survey. These 545 survey completions created a statistically valid aggregate sample achieving a 95 ± 4.17 percent confidence level.

During data analysis, data was segmented by organization type, total staff size, and type of market served in order to uncover any meaningful differences between the respective groups. Key meaningful differences are noted throughout the report; however, all significant differences are included in Appendix B. If no meaningful differences are reported it can safely be assumed the aggregate data is representative of all respondents.

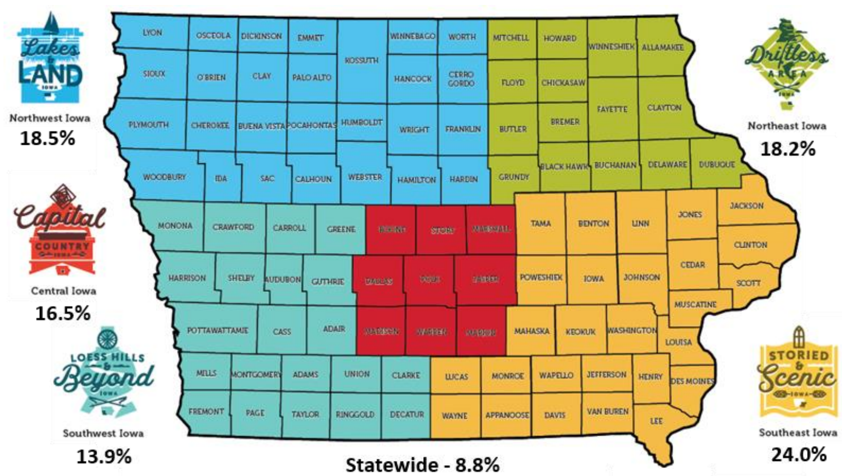
Executive Summary

Organizational Demographics

Attractions & Events (39.1%)	Tourism Asset Businesses (33.3%)	Tourism Organizations (27.6%)
• Arts & Cultural Orgs • Attractions • Events • Breweries • Entertainment • Sports • Outdoor Recreation	• Lodging • Restaurants/Bars • Retail • Transportation • Travel Services	• Chambers • DMO's • Economic Development Orgs • Main Street • Governments

Total survey respondents reached 545, with 19 organizational types defined in this study. Almost 20 percent of the respondents reported being in the Restaurant/Bar industry, while 11.6% reported being with an Arts & Cultural Institution and 10.5% with a Lodging Facility. The least represented industries were Transportation (1.1%), Casino (0.9%), and Travel Services (0.9%.). Just under 2 percent of the respondents reported Other industries such as Fitness/Personal training (4), Newspaper/Publication (2), Health facility, and Marketing agency. Because of the high number of organization categories, three main categories were created to provide more meaningful analysis (see above).

In comparison to survey data from 2021, 2023 respondents continue to target specific visitor audiences very similar to who 2021 respondents were targeting. The one exception was significantly stronger targeting of young adults seeking new adventures (Gen Z and Millennials ages 22-29) in 2023 (68.6%) as compared to 2021 (58.0%). Other audience targeting percentages for 2023 ranged from a low of 84.4% for older adults / retirees / Boomers (56+) to a high of 86.6% for middle-aged adults with disposable income for travel (Gen X ages 40-55).



Nearly half (48.1%) of the respondents serve rural areas while 23.9% serve statewide and 13.8% urban areas. The total number of locations represented by aggregate respondents was 4,999 with an average of 9.21. Additionally, a fairly even distribution of travel area coverage was reported as shown in the graphic.

Overall Perception of Tourism

When asked to rate how well the state is doing at promoting and growing tourism, nearly two-thirds (62.8%) reported a rating of Excellent or Good, while only 5.3% said Poor or Very Poor. By using a scale of 1 to 5 where one is Very Poor and 5 is Excellent, the aggregate mean rating was 3.74. Among the three respondent categories, Tourism Organizations reported a significantly higher level of satisfaction (mean of 3.94) as compared to Attractions and Events (mean of 3.74) and Tourism Asset Businesses (mean of 3.56).

Respondents were also asked to rate their perception of quality for specific aspects of state tourism efforts. These aspects included Overall marketing, Product development, and Maintenance. Using a scale of 1 to 5 where one is Very Poor and 5 is Excellent, Overall marketing was rated highest with a 3.70, followed by Product development (mean of 3.55) and Maintenance (mean of 3.46). The top recommendation from the follow-up responses was to increase funding and investment in state parks, rural areas, and facilities, as well as improve maintenance and infrastructure. This includes promoting and preserving rural Iowa destinations, updating and maintaining parks and trails, and providing better support for visitor centers and welcome centers. Additionally, enhancing marketing efforts, both within the state and nationwide, and fostering better collaboration between state-level tourism initiatives and local organizations were also suggested.

When asked to provide quality perceptions for several areas of Iowa's tourism offerings, all areas were rated above average with Outdoor & Recreational Activities the highest (mean of 3.86/5.00) and Nightlife & Entertainment the lowest (mean of 3.36/5.00). Based on follow-up responses, the top priorities for improving Iowa tourism as suggested by respondents are listed in the graphic to the right.

1. Promoting a wider variety of attractions and amenities, including agritourism, outdoor recreation, and rural areas.
2. Supporting small businesses, local shops, and privately-owned lodging options.
3. Improving infrastructure, such as convention centers and resorts, to support tourism.
4. Updating official websites and visitor centers to be more modern and user-friendly.
5. Focusing on family-friendly activities and events, as well as promoting unique experiences that showcase Iowa's culture and heritage.
6. Encouraging more collaboration between communities and businesses to create travel packages and promote events.
7. Addressing the lack of diversity and inclusivity in the state to make it more appealing to a wider range of visitors.

In regard to quality ratings on other state tourism support structures, Inbound Highway Transportation Options was rated highest (mean of 3.81/5.00). All other support structures were rated average to slightly above average with the exception of Tourism Funding (mean of 2.92/5.00), In-market Transportation Options (mean of 2.83/5.00), and International Tourism Readiness (mean of 2.73/5.00). Additionally, the open-end responses indicate several concerns and areas for improvement in Iowa's tourism and infrastructure. Some of the main issues mentioned are listed in the graphic to the left.

1. Regressive legislation, particularly anti-LGBTQ+ laws, which may negatively impact tourism and drive people away from the state.
2. Inadequate public transportation, especially in rural areas and smaller cities.
3. Poor road conditions and maintenance, particularly outside of Des Moines and in southern Iowa.
4. Lack of wayfinding signs and modern signage for cities and attractions.
5. Insufficient funding and support for tourism, especially in rural areas.
6. Limited public restroom availability and facilities for travelers.
7. A need for better promotion of local attractions and unique features of Iowa.
8. The desire for improved public infrastructure, such as bike trails and passenger trains.

Marketing Budget & Target Areas

Using midpoint calculations, the mean dollar amount spent on annual advertising/paid media and promotions was $45,912.51. Respondents in the Tourism Organizations (mean of $57,101.20) and Attraction & Events (mean of $52,538.31) categories reported above average spending, while the Tourism Asset Businesses (mean of $28,605.89) fell below the aggregate mean. A similar trend was seen for annual public relations and influencer budgets. Again, respondents in the Tourism Organizations (mean of $5,830.30) and Attractions & Events (mean of $4,791.49) categories reported above average spending, while Tourism Asset Businesses (mean of $3,435.37) fell below the aggregate mean ($4,795.66).

In terms of geographic targets for marketing and public relations efforts, the vast majority of respondents (88.8%) primarily target was Iowa. Other states of significance include Minnesota (26.8%), Nebraska (25.7%), Illinois (24.6%), Wisconsin (20.4%), and Missouri (18.2%). Additionally, respondents aggregately reported having an average of 46.03 total employees with an average of 1.59 marketing staff and an average of 1.28 tourism marketing staff.

State Resource Awareness & Utilization

When asked to indicate familiarity or awareness of state tourism-related grants, programs, and marketing sources, respondents reported being very familiar or somewhat familiar with the Travel Iowa Advertising (73.6%), Travel Iowa Website Listings (71.2%), and Destination Iowa (70.3%). In terms of participation, Travel Iowa Website Listings (54.5%) and Travel Iowa Advertising (48.7%) were most often reported for current participation or past participation. See the graphic for complete familiarity / awareness and participation levels.

	Familiarity / Awareness Level	Participation Level
High	• Travel Iowa Website Listings • Travel Iowa Advertising • Destination Iowa	• Travel Iowa Website Listings • Travel Iowa Advertising
Medium	• Enhance Iowa / Community Attraction and Tourism Program (CAT) • Iowa Tourism Marketing Grant Program (ITG) • Iowa Tourism Office Marketing Co-op Program	• Destination Iowa • Iowa Tourism Office Marketing Co-op Program • Iowa Tourism Marketing Grant Program (ITG) • Enhance Iowa / Community Attraction and Tourism Program (CAT) • Localhood
Low	• Arrivalist Research Co-op Program • Regional Sports Authority District Program (RSAD) • Localhood • Meet in Iowa • Sports Tourism Program	• Arrivalist Research Co-op Program • Regional Sports Authority District Program (RSAD) • Meet in Iowa • Sports Tourism Program

Additional feedback was collected specifically about the Iowa Tourism Marketing Grant Program (ITG) and the Iowa Tourism Office Marketing Co-op Program. Respondents reported the highest level of agreement with the programs being relevant to their organizations and the program objectives being clear. However, respondents offered suggestions for each of the programs. In regard to the Iowa Tourism Office Marketing Co-op Program, best first steps would be to explore ways to make the program more accessible and affordable for smaller organizations and communities with limited budgets. This could include offering cooperative advertising opportunities, providing more targeted and measurable impact data, and considering adjustments to the qualification criteria for grants and other opportunities. Additionally, it would be helpful to increase awareness and understanding of the program among those who are not familiar with it.

Best first steps for improving the Iowa Tourism Office's Marketing Grant Program include:

1. Increase awareness and communication about the program, its requirements, and its benefits.
2. Provide clearer guidelines on the types of projects that are more likely to be funded, such as digital-based programming.
3. Consider adjusting the matching requirements for communities with limited budgets.
4. Reevaluate the population cut-off and requirements to better accommodate small towns and rural areas.
5. Offer more support and resources for organizations that are interested in applying but may not have the necessary staff or expertise.
6. Continuously review and update the program's criteria to ensure it aligns with the state tourism office's strategic goals and the needs of the communities it serves.

Enhancement Suggestions & Advocacy Needs / Priorities

Additional open-ended questions were asked to better understand how to enhance participation in marketing initiatives and ideas for new or different programs, co-op options or grant programs. Enhancement suggestions indicate that participants are seeking more information and awareness about available programs and opportunities for promoting tourism. They mention the need for better communication, outreach, and affordability, especially for small businesses and rural communities. Some respondents suggest using social media, email updates, and local meetings to share information and make it more accessible. They also express interest in receiving guidance on how to participate in various initiatives and request more support in terms of funding and resources.

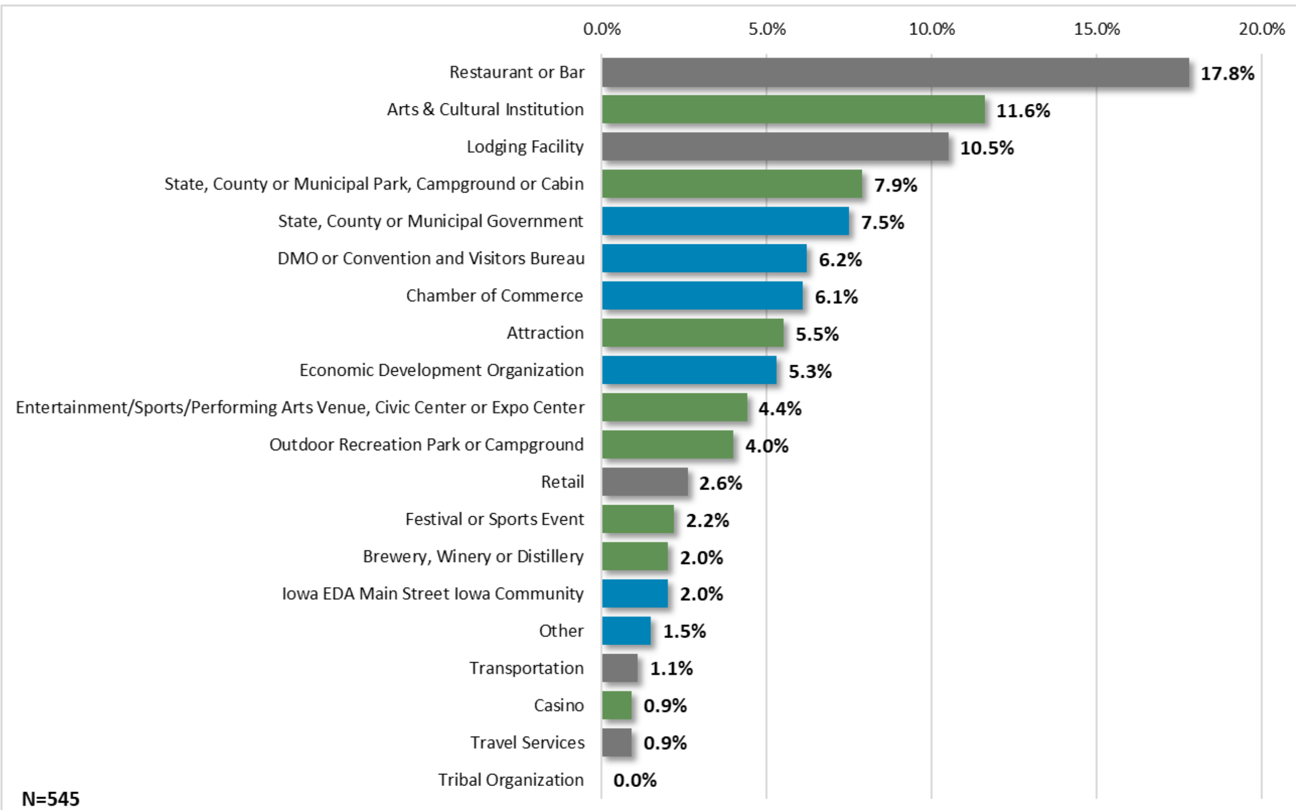
Comments regarding new ideas suggest that there is a desire for more support and resources for rural areas, agritourism startups, and small businesses. Respondents mention the need for assistance in marketing, advertising, and grant funding for various purposes, such as outdoor recreation, park development, and historic building conversion. They also express interest in more training, educational programs, and collaboration between different regions and communities. Some respondents feel that there is a focus on larger cities and attractions, and they would like to see more emphasis on promoting rural tourism and smaller communities. Additionally, there is a call for more diverse grant programs, targeting different types of events and attractions, as well as support for workforce development and infrastructure improvements.

Based on the comments, we suggest the following best first steps for Iowa organizations. Encourage organizations to explore the various programs, grants, and opportunities and identify which ones are most relevant to their specific needs and goals. Promote reaching out to Travel Iowa or other relevant regional/local organizations to learn more about opportunities and how to access them. Additionally, counsel them to consider collaborating with other local businesses, organizations, and communities to share resources, ideas, and best practices for promoting tourism in their area

Demographics

Industry

The top three primary tourism industry organizations reported by respondents include: Restaurant or Bar (17.8%), Arts & Cultural Institution (11.6%), and Lodging Facility (10.5%). Less than two percent of the respondents reported their industry as Other (1.5%), Transportation (1.1%), Casino (0.9%), and Travel Services (0.9%.)

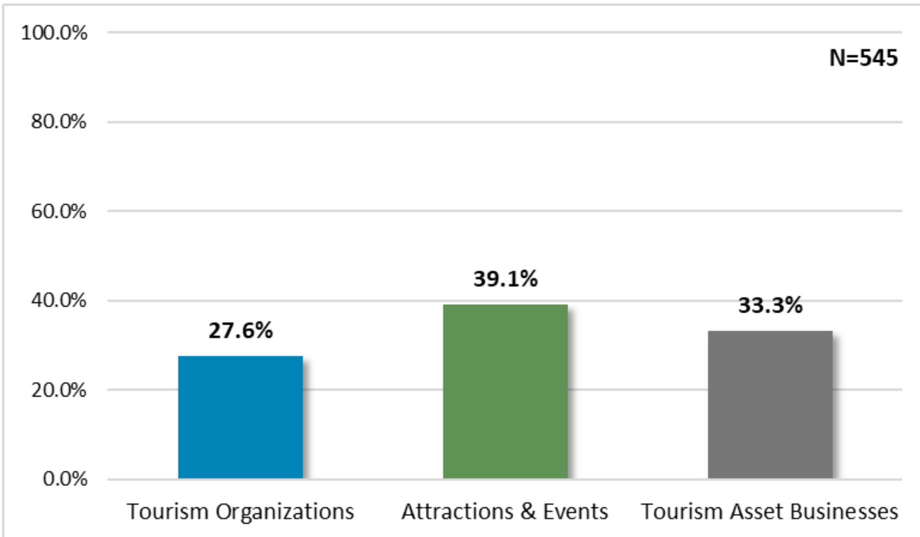


Other Industry respondents included the following responses:

- Fitness/Personal training – 4
- Newspaper/Publication – 2
- Health facility
- Marketing agency

The travel industry is comprised of many very specific organization types. To perform meaningful analysis, we reduced that number to a more manageable number by creating three main categories. The groups include Attractions & Events (39.1%), Tourism Asset Businesses (33.3%), and Tourism Organizations (27.6%).

- Attraction & Events include: Arts & Cultural Organizations, Attractions, Events, Breweries, Entertainments, Sports, and Outdoor Recreation.
- Tourism Asset Businesses include: Lodging, Restaurants, Retail, Transportation, and Travel Services
- Tourism Organizations include: Chambers, DMO's, Economic Development Organizations, Main Street Governments

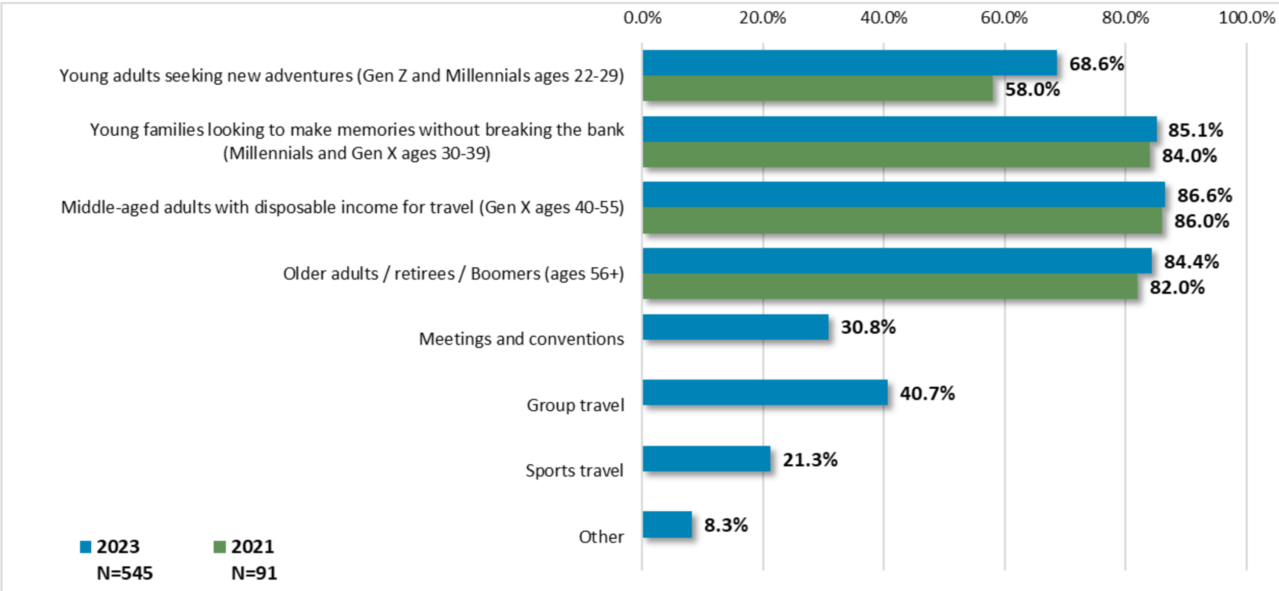


Among respondent groups, the following statistically significant difference was detected:

- Tourism Organizations (66.9%) are significantly more likely to primarily serve rural areas as compared to Attractions & Events (42.9%), and Tourism Asset Businesses (39.7%).

Target Audiences

Target visitor audiences from 2023 were very similar to those identified in the 2021 survey. However, we see that Gen Z and Millennials are now targeted at a higher level in 2023.



Among 2023 respondent groups, the following statistically significant differences were detected:

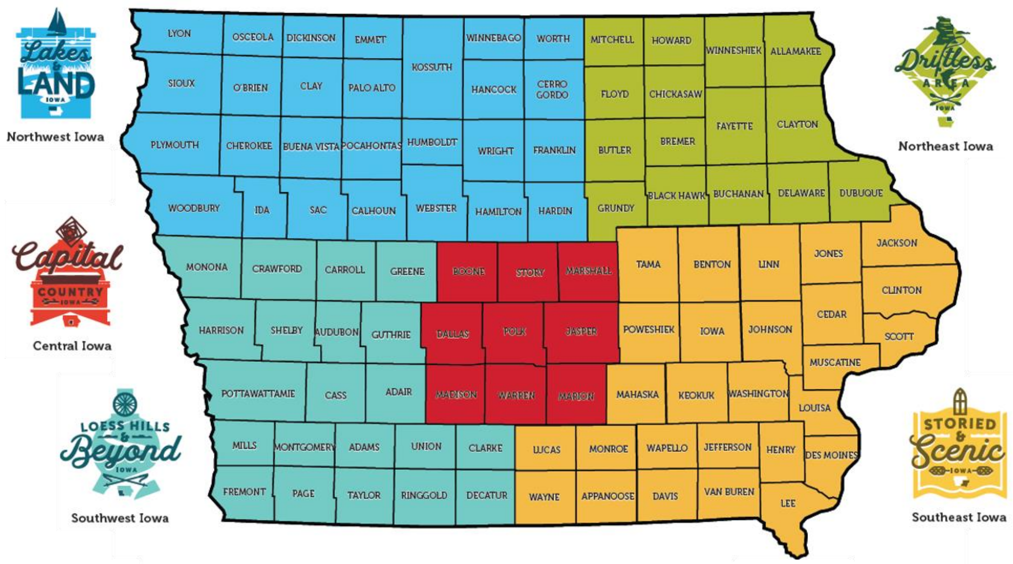
- Tourism Organizations (72.3%) and Attractions & Events (72.9%) are significantly more likely to be targeting young adults seeking new adventures / Gen Z and Millennials ages 22-29 as compared to Tourism Asset Businesses (60.9%).
- Tourism Organizations (95.3%) and Attractions & Events (86.2%) are significantly more likely to be targeting young families looking to make memories without breaking the bank / Millennials and Gen X ages 30-39 as compared to Tourism Asset Businesses (76.0%).
- Respondents in Urban areas (45.3%) reported a significantly higher target audience for meetings and conventions as compared to Suburban areas (26.7%), Rural areas (29.0%), and Statewide (27.7%).

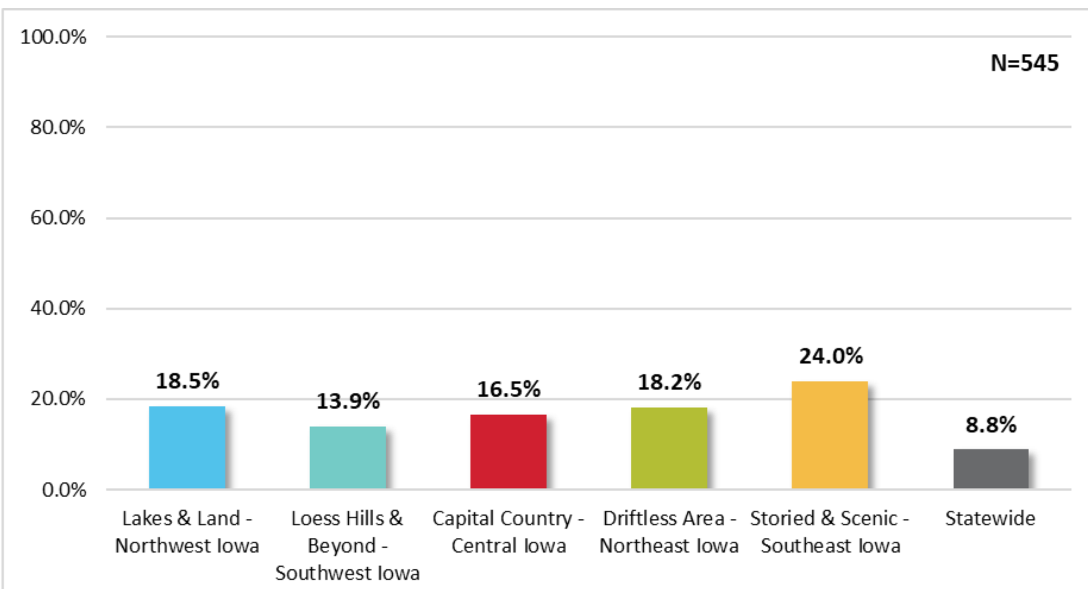
Other target audiences mentioned by respondents included:

- Wildlife/Conservationists/Outdoor Enthusiasts – 9
- Special occasion travel (weddings, reunions, etc.) – 6
- Community Events/Clubs/Fairs/Festivals – 5
- Corporate - 5
- Families with children / Multigenerational families – 5
- Business professionals – 3
- Do not target – 2
- Foodies – 2
- History Enthusiasts – 2
- Cultural Education
- Golfers
- International travelers
- Leisure travelers
- LGBTQ
- Military
- Only use word-of-mouth advertising
- School field trips
- Stay at home parents
- Travelers with disabilities or those needing respite care
- Youth (under age 18)

Geographic Coverage

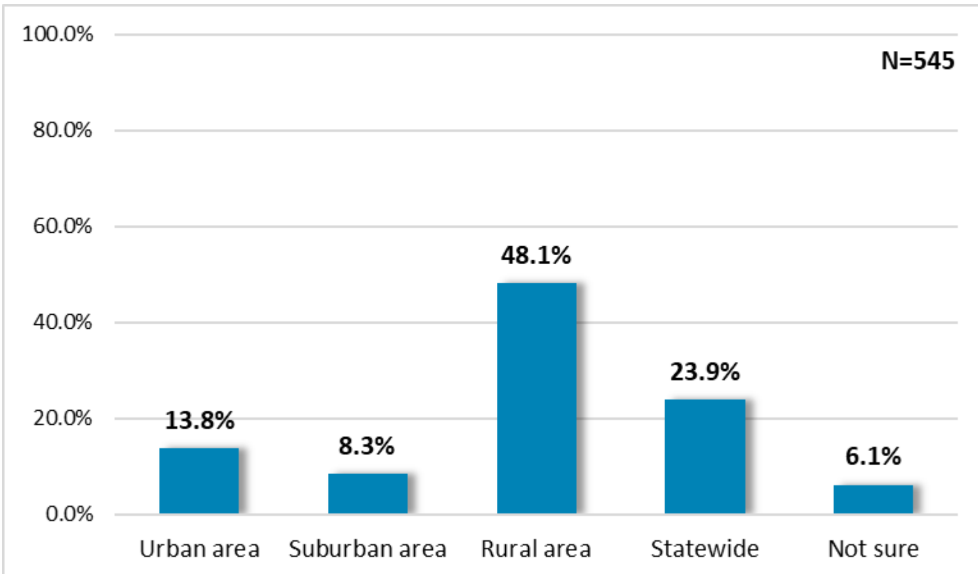
Respondents reported a fairly even distribution of travel area coverage. The highest concentration was in Storied and Scenic Southeast Iowa (24.0%) while the rest of the areas ranged from 14 to 19%.





Locations Primarily Served

Nearly half (48.1%) of the respondents serve Rural areas while 23.9% serve Statewide and 13.8% Urban areas. The bottom tier includes Suburban (8.3%) and Not Sure (6.1%). No significant differences were detected.



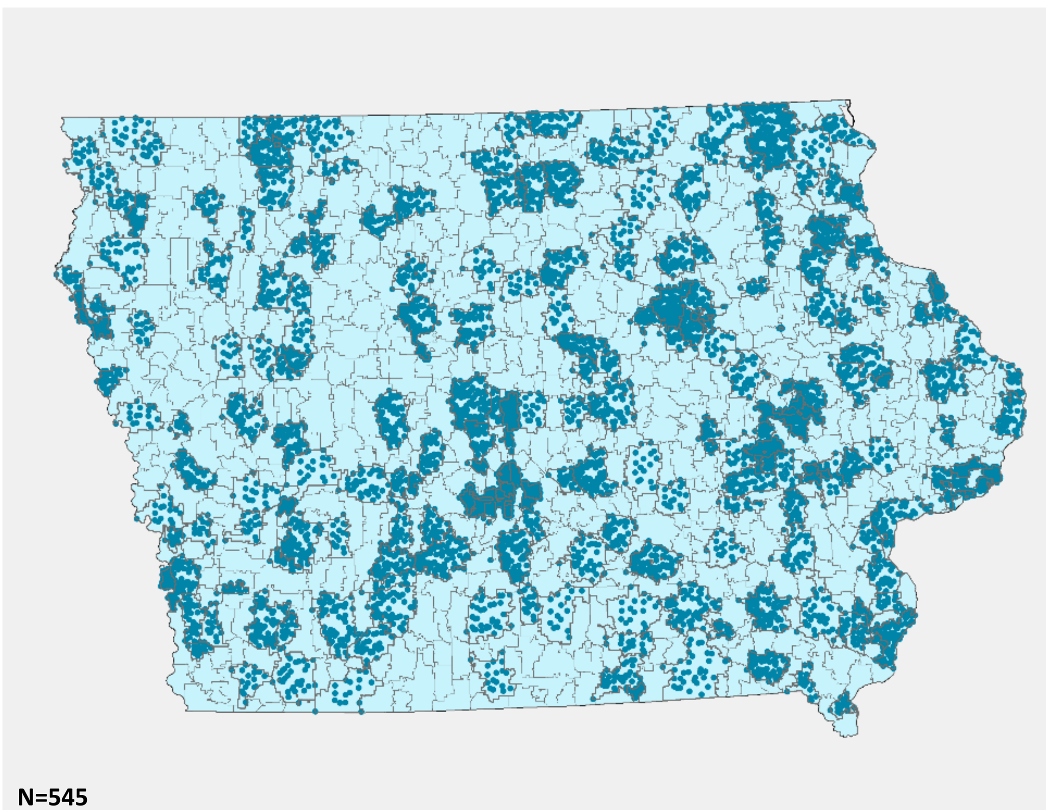
Number of Locations in Iowa

The Attractions & Events category lead the state with a total of 3,901 locations in Iowa, followed by Tourism Organizations (640), and Tourism Asset Businesses (428). The total aggregate number of locations represented in Iowa was 4,999 with a mean of 9.21.

	Aggregate	Tourism Organizations	Attractions & Events	Tourism Asset Businesses
N=	**543**	**147**	**209**	**179**
Mean	**9.21**	**4.35**	**18.67**	**2.39**
Min	**1**	**1**	**1**	**1**
Max	**2,050**	**83**	**2,050**	**99**
Sum	**4,999**	**640**	**3,901**	**428**

Zip Code

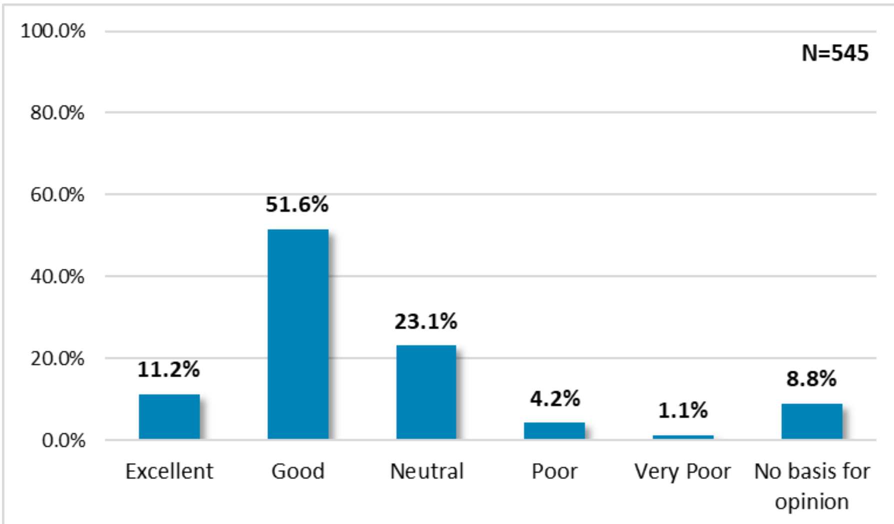
There was good statewide representation from survey participants. The highest metro areas included Des Moines, Cedar Rapids, Iowa City corridor, Waterloo/Cedar Falls, Mason City, and Decorah.

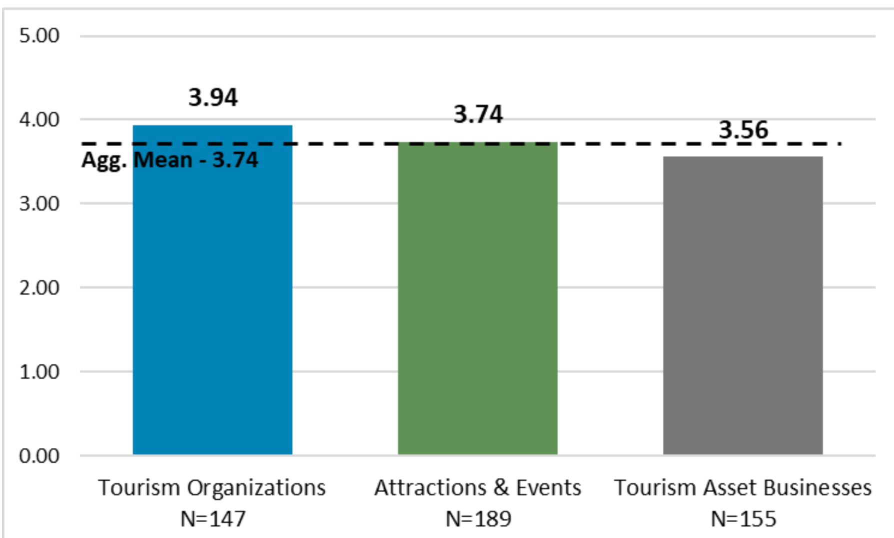


Aggregate Survey Results

Rate how well the state is doing at promoting and growing tourism.

Nearly two-third (62.8%) of the respondents reported a rating of Excellent or Good, while only 5.3% said Poor or Very Poor. The mean rating was 3.74. Among the three respondent categories, Tourism Organizations reported the highest level of satisfaction (mean of 3.94), followed by Attractions and Events (mean of 3.74) and Tourism Asset Businesses (mean of 3.56).



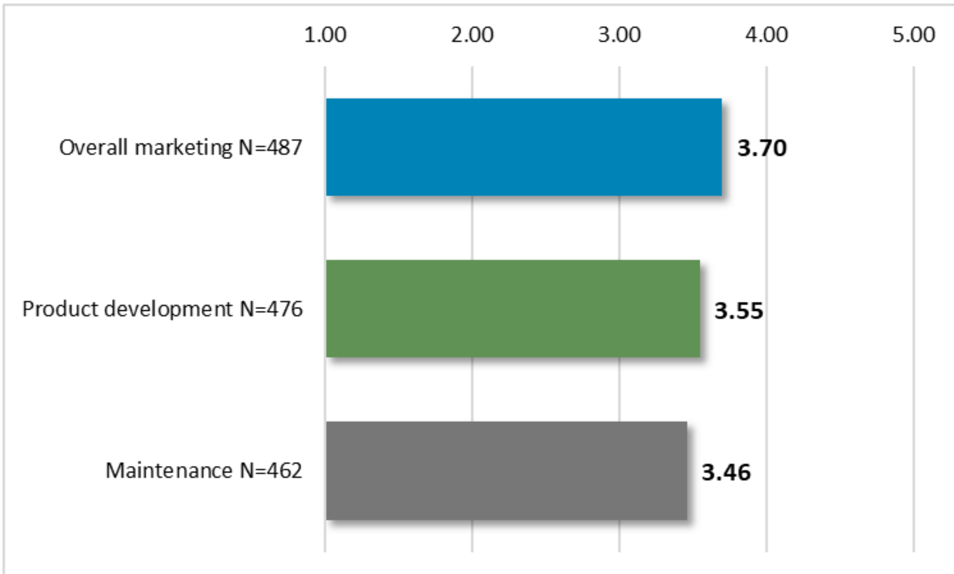


Among respondent groups, the following statistically significant difference was detected:

- Tourism Organizations (mean of 3.94) reported a significantly higher rating for how well the state is doing at promoting and growing tourism as compared to Attractions & Events (mean of 3.74) and Tourism Asset Businesses (mean of 3.56).

Rate your perception of the quality of the state tourism efforts for the following general areas.

Respondents reported above average ratings for Overall Marketing (3.70), Product Development (3.55), and Maintenance (3.46).



Among respondent groups, the following statistically significant difference was detected:

- Tourism Organizations reported a significant higher mean of 4.03 for Overall Marketing as compared to Attractions & Events (3.61) and Tourism Assets (3.47).

When asked to elaborate on their responses, respondents' comments are reflected in the word cloud below highlighting the single words mentioned most frequently.

Additionally, the open-end responses indicate that there is a need for more funding and attention to rural areas, state parks, and facilities in Iowa. Respondents suggest that improvements in infrastructure, maintenance, and staffing are necessary for parks and visitor centers. They also mention the importance of promoting Iowa tourism within the state and to out-of-state visitors through various marketing channels, including TV, social media, and targeted campaigns. Additionally, respondents express a desire for better collaboration between state-level tourism initiatives and local organizations, as well as increased representation of rural areas in marketing decisions. Some respondents also mention the need for more investment in public lands, trails, river accesses, and parks.

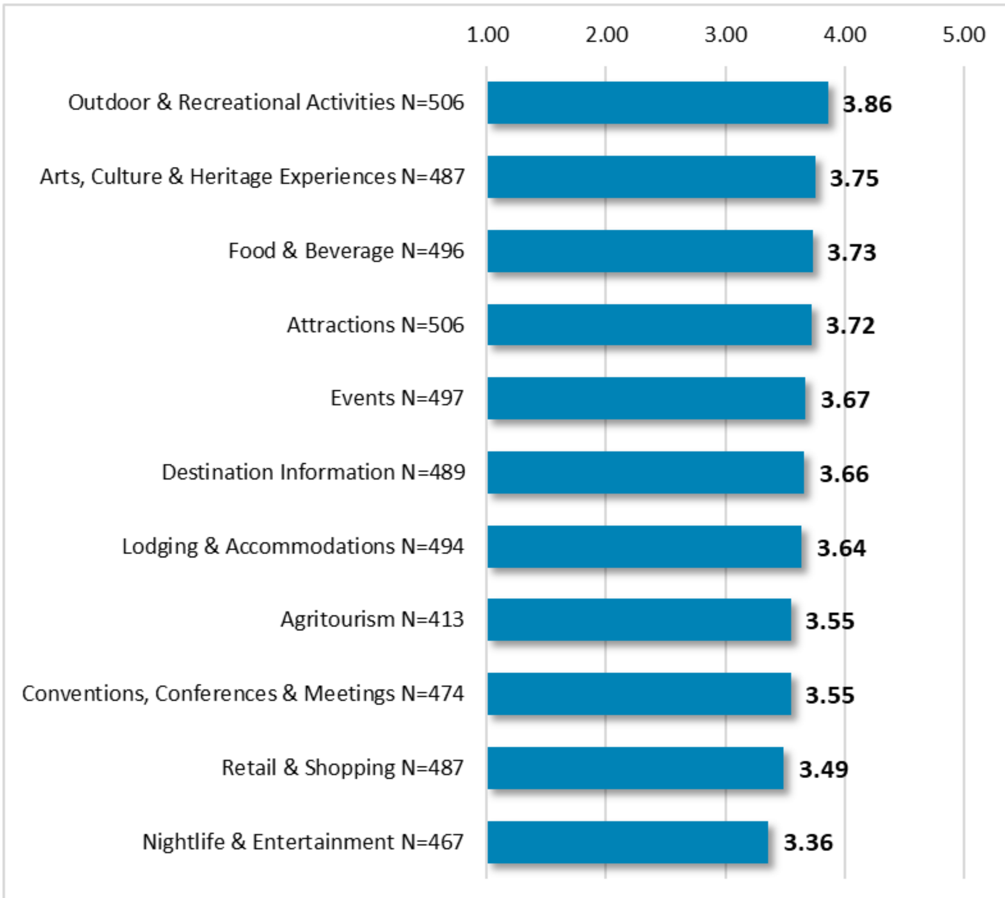
The top recommendation from the responses is to increase funding and investment in state parks, rural areas, and facilities, as well as improve maintenance and infrastructure. This includes promoting and preserving rural Iowa destinations, updating and maintaining parks and trails, and providing better support for visitor centers and welcome centers. Additionally, enhancing marketing efforts, both within the state and nationwide, and fostering better collaboration between state-level tourism initiatives and local organizations are also suggested.

The most important aspects mentioned in the responses include:

1. Increased funding and attention to rural areas, state parks, and facilities.
2. Improved maintenance and infrastructure in parks and recreational areas.
3. More investment in visitor centers and rest areas.
4. Greater focus on promoting small-town tourism and local attractions.
5. Enhanced marketing efforts, including TV advertising, social media presence, and targeting out-of-state visitors.
6. Better collaboration between state-level tourism initiatives and local organizations.
7. Encouraging agritourism and ecotourism in rural areas.
8. Addressing the political climate in Iowa to make it more appealing to a diverse range of visitors.

Rate your perception of the quality of each area of Iowa's tourism offerings.

The top rating for Iowa's tourism offering by respondents was Outdoor & Recreation Activities (3.86) followed by Arts, Culture & Heritage Experiences (3.75), Food & Beverage (3.73), and Attractions (3.72). The lowest rating was given to Nightlife & Entertainment (3.36).



Among respondent groups, the following statistically significant differences were detected:

- Tourism Organizations (mean of 4.01) reported a significantly higher quality perception for outdoor & recreational activities as compared to Tourism Asset Businesses (mean of 3.74).
- Tourism Asset Businesses (mean of 3.36) reported a significantly higher quality rating for Iowa's public health policies and regulation as compared to Tourism Organizations (mean of 3.09).

When asked to elaborate on their responses, respondents' comments are reflected in the word cloud below highlighting the single words mentioned most frequently.

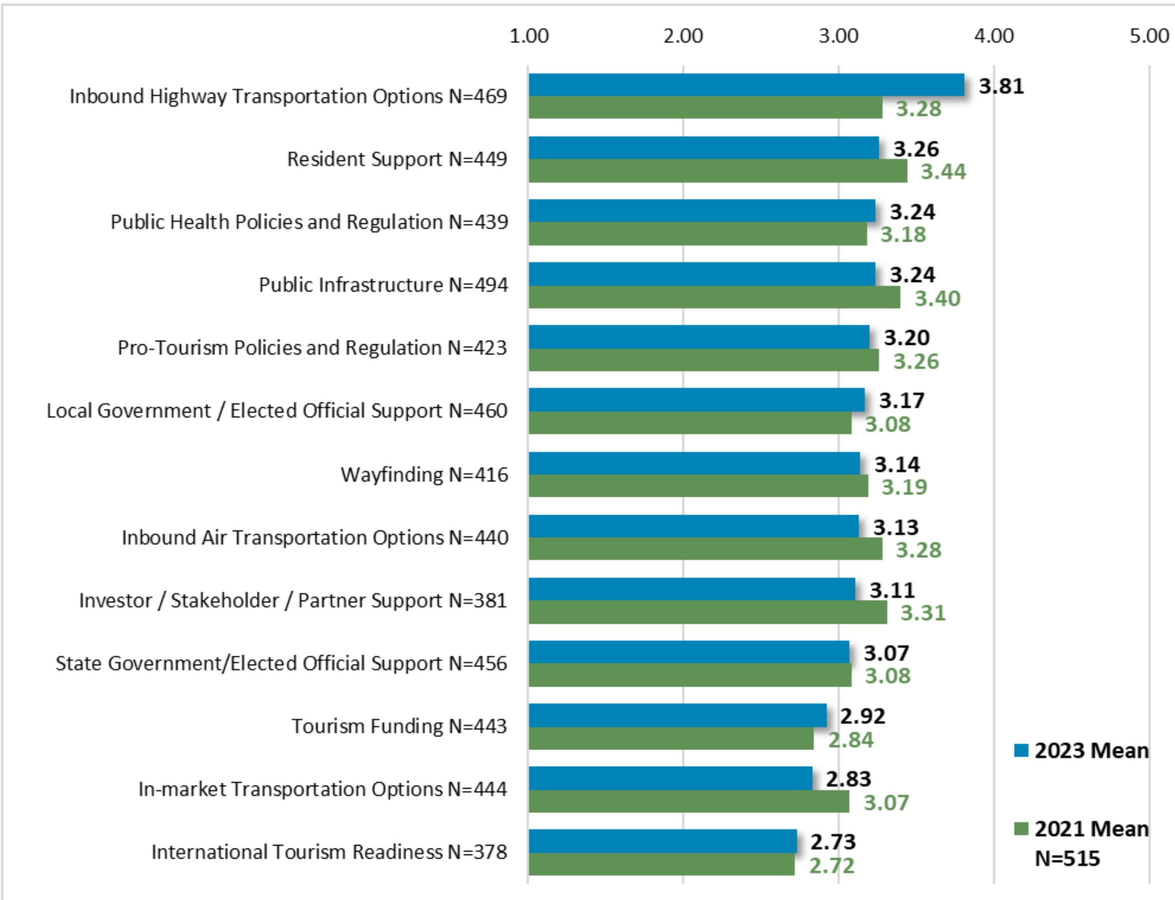
Additionally, the open-end responses indicate that there is a general feeling that Iowa has a lot to offer in terms of tourism, but there is room for improvement in promoting and supporting various attractions and amenities. Respondents mentioned the need for more emphasis on agritourism, rural areas, and small businesses. Some also expressed concerns about the state's focus on certain regions or larger cities, while others felt that there is a lack of promotion for outdoor recreation, nightlife, and entertainment. Additionally, there were suggestions to update official websites and visitor centers to be more modern and to improve the state's infrastructure to support tourism, such as convention centers and resorts.

Based on the open-end responses, the top priorities for improving Iowa tourism seem to be:

1. Promoting a wider variety of attractions and amenities, including agritourism, outdoor recreation, and rural areas.
2. Supporting small businesses, local shops, and privately-owned lodging options.
3. Improving infrastructure, such as convention centers and resorts, to support tourism.
4. Updating official websites and visitor centers to be more modern and user-friendly.
5. Focusing on family-friendly activities and events, as well as promoting unique experiences that showcase Iowa's culture and heritage.
6. Encouraging more collaboration between communities and businesses to create travel packages and promote events.
7. Addressing the lack of diversity and inclusivity in the state to make it more appealing to a wider range of visitors.

Rate your perception of the quality of each area of Iowa's tourism support structure.

The highest rated support structure categories include: Inbound Highway Transportation Options (3.81), Resident Support (3.26), Public Health Policies & Regulations (3.24), and Public Infrastructure (3.24). The lowest rated support structure categories include State Government/Elected Official Support (3.07), Tourism Funding (2.92), In-market Transportation Options (2.83), and International Tourism Readiness (2.73).



Among respondent groups, the following statistically significant differences were detected:

- Attractions & Events (mean of 3.26) reported a significantly higher quality rating for Iowa's wayfinding as compared to Tourism Organizations (mean of 2.99).
- Respondents in Suburban areas (3.49) reported a significantly higher mean for Quality of Iowa's tourism support structure for Inbound Air Transportation Options compared to Urban areas (2.90) and Rural areas (3.08).

When asked to elaborate on their responses, respondents' comments are reflected in the word cloud below highlighting the single words mentioned most frequently.

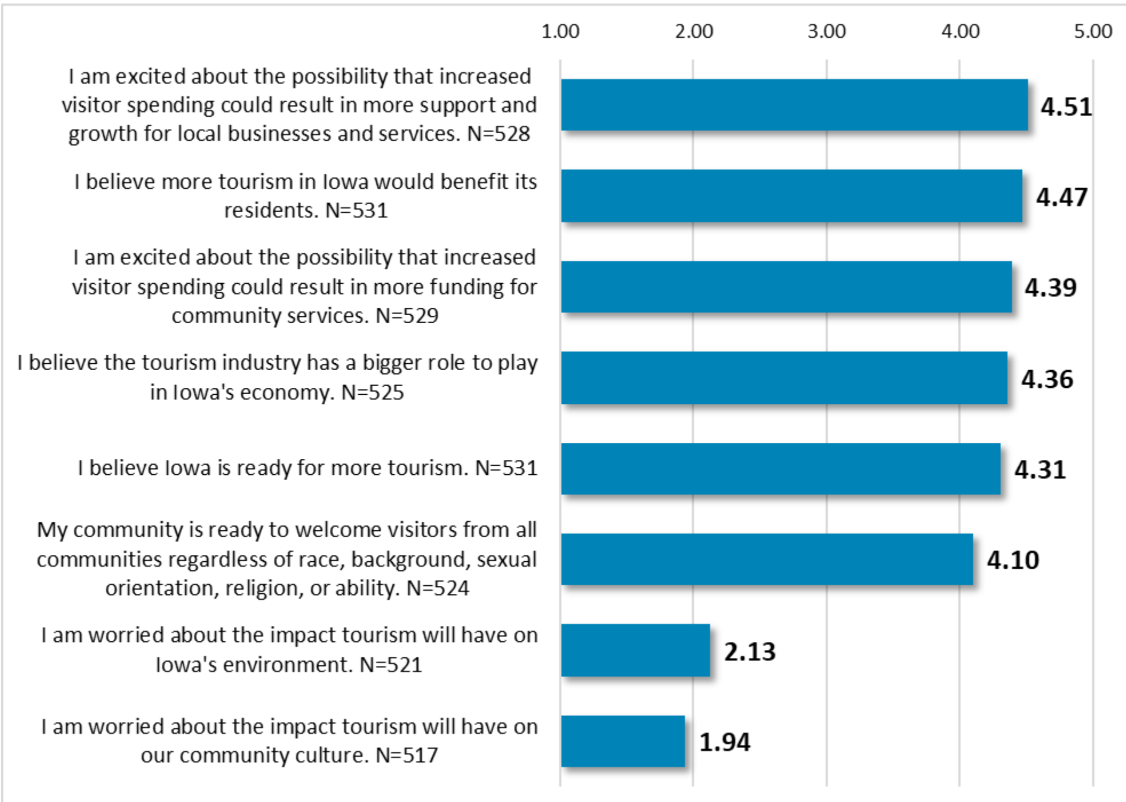
Additionally, the open-end responses indicate several concerns and areas for improvement in Iowa's tourism and infrastructure. Some of the main issues mentioned include:

1. Regressive legislation, particularly anti-LGBTQ+ laws, which may negatively impact tourism and drive people away from the state.
2. Inadequate public transportation, especially in rural areas and smaller cities.
3. Poor road conditions and maintenance, particularly outside of Des Moines and in southern Iowa.
4. Lack of wayfinding signs and modern signage for cities and attractions.
5. Insufficient funding and support for tourism, especially in rural areas.
6. Limited public restroom availability and facilities for travelers.
7. A need for better promotion of local attractions and unique features of Iowa.
8. The desire for improved public infrastructure, such as bike trails and passenger trains.

Overall, respondents believe that Iowa has potential as a tourist destination, but improvements in infrastructure, transportation, and promotion are needed to attract more visitors and enhance the experience for both residents and tourists.

Select your level of agreement with each statement.

Top level of agreement for the given statements about the Iowa Tourism Industry include: “I am excited about the possibility that increased visitor spending could result in more support and growth for local businesses and services” (4.51) and “I believe more tourism in Iowa would benefit its residents” (4.47). The lowest rating was given to “My community is ready to welcome visitors from all communities regardless of race, background, sexual orientation, relation, or ability” (4.10). “Worry about the impact tourism will have on Iowa’s environment” (2.13) and “Community culture” (1.94) do not appear to be an issue with respondents.



Among respondent groups, the following statistically significant differences were detected:

- Tourism Asset Businesses (mean of 4.21) reported a significantly higher level of agreement with the statement, “My community is ready to welcome visitors from all communities regardless of race, background, sexual orientation, religion, or ability” as compared to Attractions & Events (mean of 3.98).
- Tourism Asset Businesses (mean of 2.11) reported a significantly higher level of agreement with the statement, “I am worried about the impact tourism will have on our community culture” as compared to Attractions & Events (mean of 1.97) and Tourism Organizations (mean of 1.72).
- Tourism Asset Businesses (mean of 2.21) and Attractions & Events (mean of 2.22) reported a significantly higher level of agreement with the statement, “I am worried about the impact tourism will have on Iowa’s environment” as compared to Tourism Organizations (mean of 1.95).

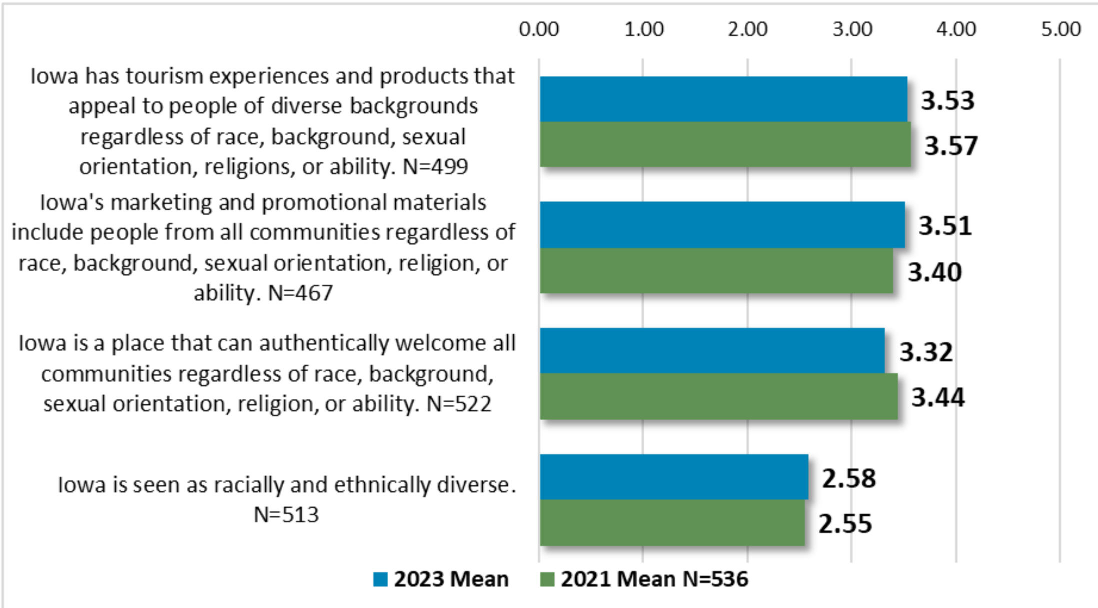
When asked to elaborate on their responses, respondents' comments are reflected in the word cloud below highlighting the single words mentioned most frequently.

Additionally, the open-end responses indicate a mix of opinions on tourism in Iowa. Some respondents believe that increased tourism would benefit small towns and local businesses, while others express concerns about the state's readiness to welcome diverse visitors. There are also concerns about the impact of recent legislation on the state's image and the potential strain on natural resources and infrastructure. Some respondents suggest that increased tourism could improve community culture and that investment in tourism should be sustained and spread across the state. However, there are also concerns about the state's ability to provide necessary resources and support for increased tourism.

The top priority of the respondents seems to be making Iowa more welcoming and inclusive for diverse visitors, improving infrastructure, and investing in tourism-related resources such as parks, trails, and natural areas. Additionally, addressing political and legislative issues that may negatively impact the state's image and addressing concerns about the environment and sustainability are also important.

Select your level of agreement with each statement.

There was not a noticeable difference in responses from 2021 to 2023. Respondents reported the highest rating for "Iowa has tourism experiences and products that appeal to people of diverse backgrounds regardless of race, background, sexual orientation religions, or ability" (3.53) while the lowest rating was given to "Iowa is seen as racially and ethnically diverse" (2.58).

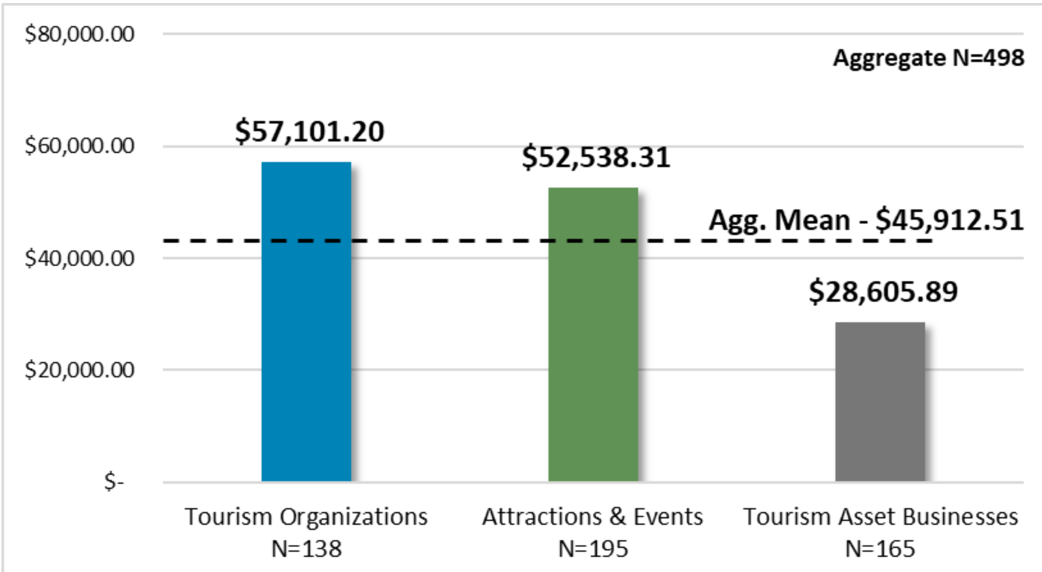


Among respondent groups, the following statistically significant difference was detected:

- Respondents in Statewide areas (3.72) reported a significantly higher mean for level of agreement for "Iowa has tourism experiences and products that appeal to people of diverse backgrounds" compared to Urban areas (3.32).

Select the dollar range that best describes your <u>annual advertising/paid media and promotions budget</u> based on a 3-year average for fiscal years 2020, 2021 and 2022.

Using midpoint calculations, the mean dollar amount spent on annual advertising/paid media and promotions was $45,912.51. Respondents in the Tourism Organizations and Attraction & Events categories reported above average spending, while the Tourism Asset Businesses fell below the mean.

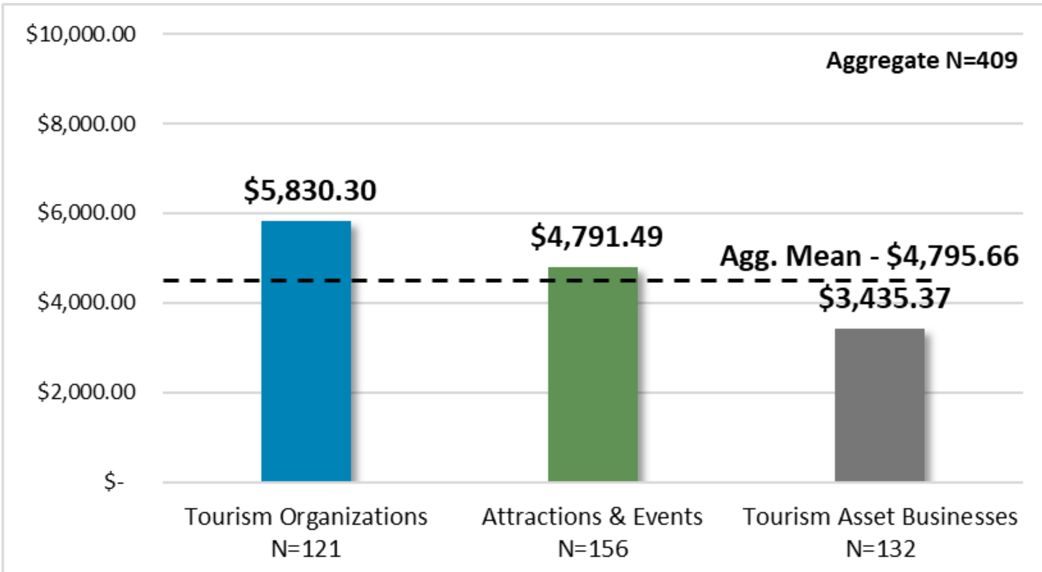


Among respondent groups, the following statistically significant difference was detected:

- Respondents who spend less than $10,000 on their annual advertising/paid media and promotions budget reported a significantly higher usage in Rural areas (64.9%) compared to Urban areas (41.3%), Suburban areas (53.3%), and Statewide (52.3%).

Select the dollar range that best describes your <u>annual public relations and influencer budget</u> based on a 3-year average for fiscal years 2020, 2021 and 2022.

The mean dollar amount spent on annual public relations and influencer budget was $4,795.66. Respondents in the Tourism Organizations and Attractions & Events categories reported above average spending, while businesses in Tourism Asset Businesses fell below the mean.

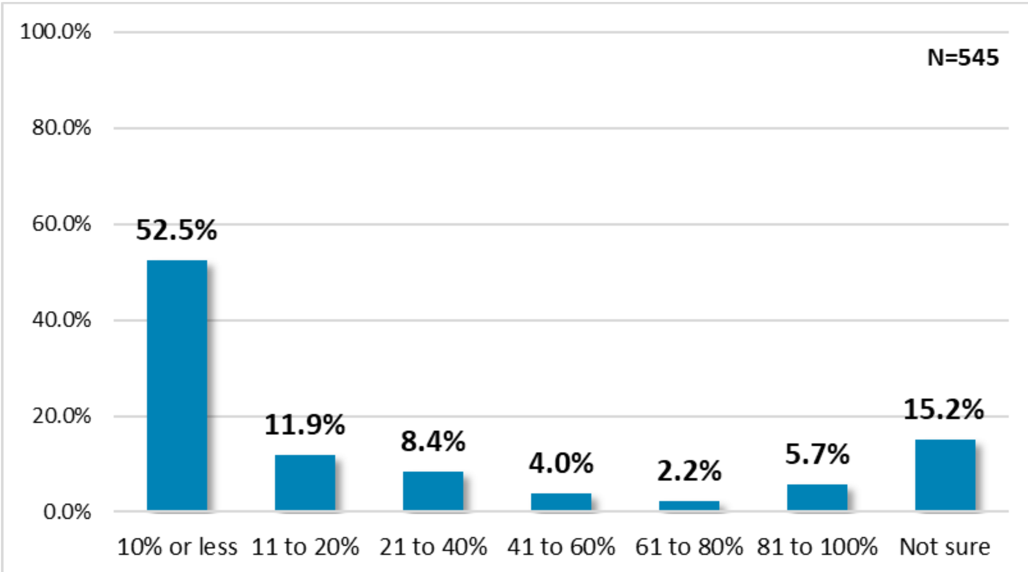


Among respondent groups, the following statistically significant differences were detected:

- Respondents who spend between $10,000 and $19,999 of their annual public relations and influencer budget reported a significantly higher usage in Urban areas (7.9%) compared to Suburban areas (2.8%), Rural areas (5.0%), and Statewide (3.8%).
- Respondents who spend between $20,000 and $49,999 of their annual public relations and influencer budget reported a significantly higher usage in Urban areas (7.9%) compared to Suburban areas (2.8%), Rural areas (1.8%), and Statewide (3.8%).

What percentage of your organization's tourism budget is spent on marketing (includes advertising/paid media and public relations)?

Over half (52.5%) of the respondents reported spending ten percent or less of their tourism budget on marketing. Just over 20 percent reported spending 11 to 40% of their budget while 11.9% report spending 41 to 100% of their budget.

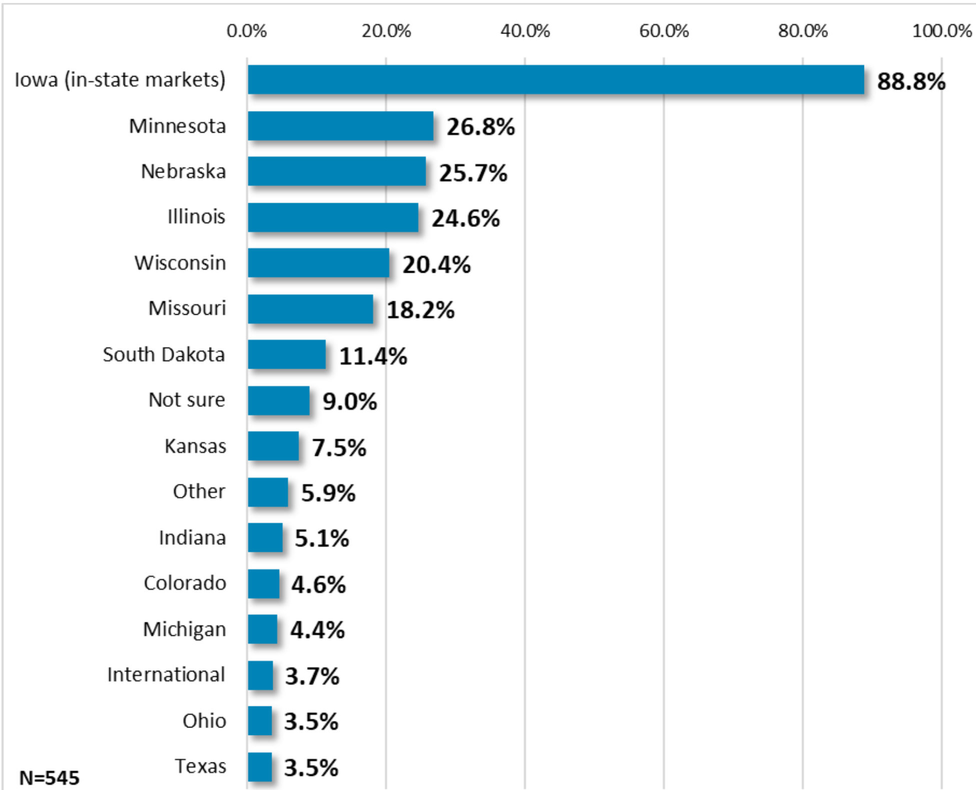


Among respondent groups, the following statistically significant differences were detected:

- Tourism Asset Businesses (56.4%) and Attractions & Events (59.0%) are significantly more likely to spend 10% or less of their tourism budget on marketing as compared to Tourism Organizations (39.9%).
- Tourism Organizations (16.2%) are significantly more likely to spend 21 to 40% of their tourism budget on marketing as compared to Attractions & Events (5.2%) and Tourism Asset Businesses (5.6%).

Select any or all geographies that reflect your organization's marketing and public relations footprint.

A majority (88.8%) of the respondents reported the primary target geography for marketing and public relations efforts was Iowa. Other states of significance include Minnesota (26.8%), Nebraska (25.7%), Illinois (24.6%), Wisconsin (20.4%), and Missouri (18.2%).



Other markets mentioned by respondents included:

- Nationwide – 17
- International – 4
- Contiguous states – 3
- Local – 3
- Midwest – 2
- East coast states
- New Jersey
- Social media

Among respondent groups, the following statistically significant differences were detected:

- Attractions & Events (6.2%) are significantly more likely to have International marketing and public relations footprints as compared to Tourism Organizations (2.7%) and Tourism Asset Businesses (1.7%).
- Respondents who use Iowa marketing and public relations footprint reported a significantly higher usage in Rural areas (52.4%) compared to Urban areas (14.6%), Suburban areas (9.6%), and Statewide (23.4%).

Approximately how many marketing related staff are employed at your organization?

Of the 544 respondents, those belonging to the Attractions & Events category reported an average of 2.12 marketing staff employed. Tourism Organization reported an average of 1.43 marketing staff, followed by Tourism Asset Businesses with an average of 1.10. The aggregate mean of marketing staff employed was 1.59.

	Aggregate	Tourism Organizations	Attractions & Events	Tourism Asset Businesses
N=	544	148	209	179
Mean	1.59	1.43	2.12	1.10
Min	0.00	0.00	0.00	0.00
Max	100.00	15.00	100.00	20.00
Sum	864.00	212.00	443.00	197.00

Approximately how many tourism marketing related staff are employed at your organization?

Respondents in the Attractions & Events category reported an average of 1.52 tourism marketing related staff employed, followed by Tourism Organizations (1.36) and Tourism Asset Businesses (0.97). The aggregate average of tourism marketing staff employed was 1.28.

	Aggregate	Tourism Organizations	Attractions & Events	Tourism Asset Businesses
N=	544	148	209	179
Mean	1.28	1.36	1.52	0.97
Min	0.00	0.00	0.00	0.00
Max	100.00	12.00	100.00	33.00
Sum	693.00	200.00	317.00	173.00

Approximately how many total staff are employed at your organization?

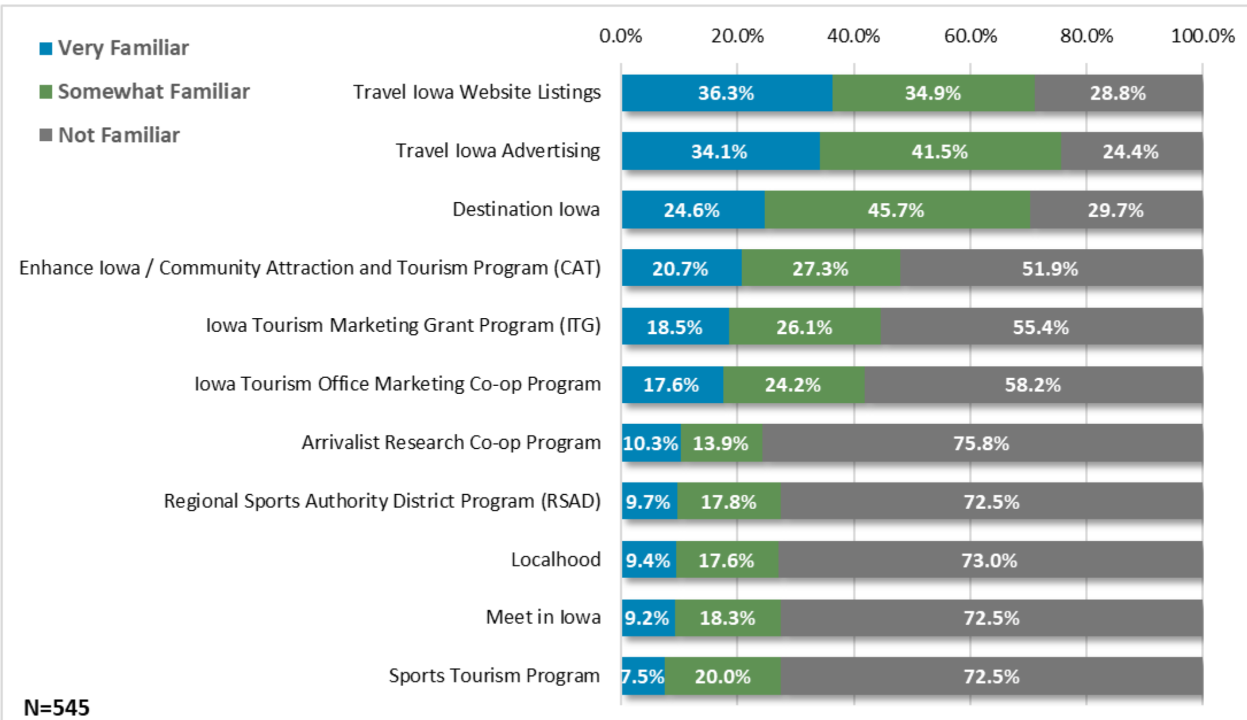
The Attractions & Events category leads staff employment with an average of 59.59 employees, followed by Tourism Asset Businesses (40.2) and Tourism Organizations (33.82). The aggregate average of total staff employed was 46.03.

	Aggregate	Tourism Organizations	Attractions & Events	Tourism Asset Businesses
N=	544	148	209	179
Mean	46.03	33.82	59.59	40.24
Min	0.00	0.00	0.00	0.00
Max	2500.00	2500.00	1300.00	2000.00
Sum	25038.00	5005.00	12453.50	7203.00

Indicate your level of awareness/familiarity and participation for each of the following tourism-related grants, programs, and marketing resources offered by the state of Iowa.

The top level of familiarity in state resources reported by respondents include Travel Iowa Website Listings (36.3%) and Travel Iowa Advertising (34.1%). Conversely, the highest levels of unfamiliarity included: Arrivalist Research Co-op Program (75.8%); Localhood (73.0%); Sports Tourism Program (72.5%); Meet in Iowa (72.5%); and Regional Sports Authority District Program (72.5%).

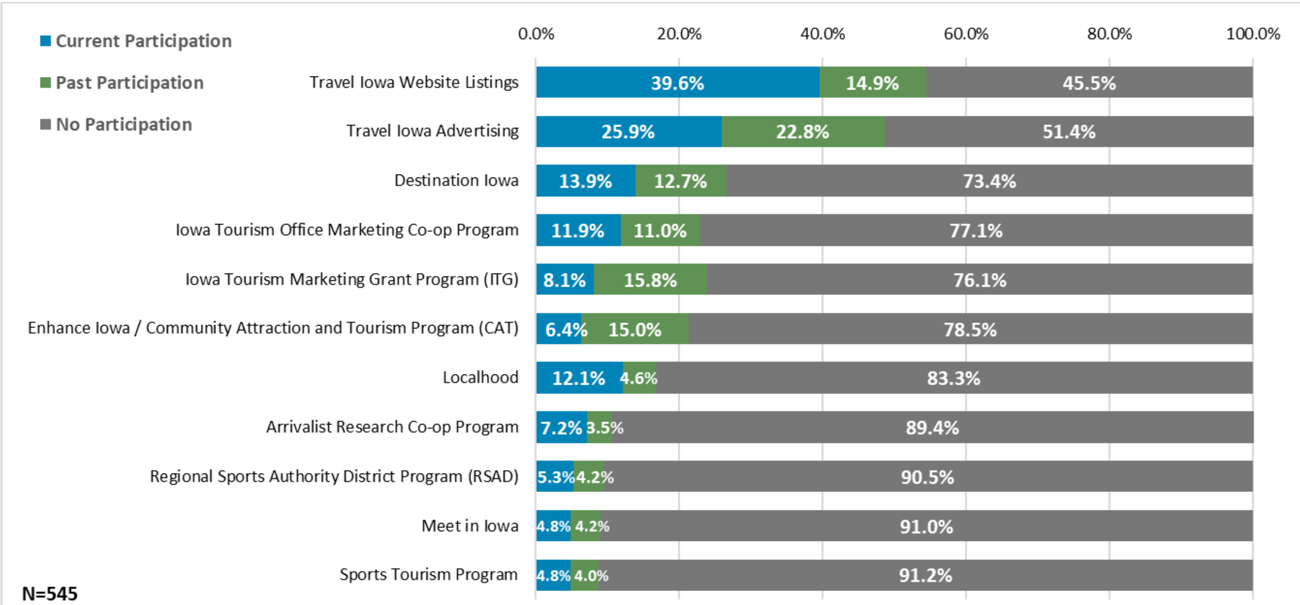
It is important to note some of the grants, programs and marketing resources have been more traditionally utilized and targeted towards specific travel organization types. For example, the Arrivalist Research Co-op Program, among others, has been primarily targeted towards Tourism Organizations.



Among respondent groups, the following statistically significant differences were detected:

- Tourism Organizations reported significantly higher levels of familiarity as compared to Attractions & Events and Tourism Asset Businesses across all programs.
- Respondents who are Very Familiar with the Regional Sports Authority District Program reported those in Urban areas (21.3%) are significantly higher compared to Suburban areas (8.9%), Rural areas (8.0%), and Statewide (7.7%).
- Respondents who are Very Familiar with Travel Iowa Website Listings reported those in Statewide (43.8%) are significantly higher compared to Urban areas (29.3%) and Suburban areas (28.9%).

The top level of participation in state resources reported by respondents include Travel Iowa Website Listings (39.6%) and Travel Iowa Advertising (25.9%). The highest levels of no participation were reported for Sports Tourism Program (91.2%), Meet in Iowa (91.0%), Regional Sports Authority District Program (90.5%), and Arrivalist Research Co-op Program (89.4%).



Among respondent groups, the following statistically significant differences were detected:

- Tourism Organizations are significantly more likely to be currently participating in or previously participated in every program with the exception of the Regional Sports Authority District Program (RSAD).
- Respondents who have participated in Iowa Tourism Marketing Grant Program in the past reported those in Rural areas (21.8%) and Statewide (16.2%) are significantly higher compared to those in Urban areas (8.0%) and Suburban areas (4.4%).
- Respondents who currently participate in Meet in Iowa reported those in Urban areas (14.7%) are significantly higher compared to Suburban areas (2.2%), Rural areas (2.3%), and Statewide (5.4%).
- Respondents who currently participate in Travel Iowa Advertising reported those in Suburban areas (6.7%) are significantly lower compared to Urban areas (25.3%), Rural areas (26.3%), and Statewide (33.8%).

In order to understand the demographics of respondents utilizing or not utilizing resources, the following profiles were created.

Participant Profiles for Most Utilized Resources

Travel Iowa Website (N=39)

- 54.1% serve rural areas
- 43.6% have less than 4 employees
- 38.5% have 4-14 employees
- 79.5% are Tourism organizations
    - 43.6% are DMO's or CVB's and 17.9% are EDO's

Travel Iowa Advertising (N=79)

- 45.2% serve rural areas
- 44.7% have 4-14 employees
- 31.6% have 15+ employees
- 46.1% are Tourism organizations and 44.7% are Attractions & Events
    - 19.7% are DMO's or CVS's
    - 17.1% are Arts & Cultural Institutions
    - 14.5% are state, county or municipal government/organization
    - 11.8% are state, county or municipal park, campground or cabin

Participant Profiles for Least Utilized Resources

Sports Tourism Program (N=465-497)

- 40.5% have less than 4 employees
- 54.2% serve rural areas and 24.5% serve statewide
- 40.1% are Attractions & Events and 33.3% are Tourism Asset Businesses
    - 18.7% are Restaurants/Bars
    - 12.3% are Arts & Cultural Institutions

Meet in Iowa (N=464-496)

- 39.0% have less than 4 employees
- 53.4% serve rural areas and 24.6% statewide
- 40.0% are Attractions & Events and 34.8% are Tourism Asset Businesses
    - 19.4% are Restaurants/Bars
    - 12.3% are Arts & Cultural Institutions
    - 9.9% are Lodging Facilities

Regional Sports Authority District Program (N=462-493)

- 40.7% have less than 4 employees
- 53.7% serve rural locations and 25.8% statewide
- 40.2% are Attractions & Events and 34.0% are Tourism Asset Businesses
    - 18.5% are Restaurants/Bars
    - 12.4% are Arts & Cultural Institutions
    - 10.1% are Lodging Facilities

Arrivalist Research Coop Program (N=456-487)

- 37.9% have less than 4 employees
- 51.3% serve rural areas and 26.3% statewide
- 41.1% are Attractions & Events and 36.3% are Tourism Asset Businesses
    - 19.9% are Restaurants/Bars
    - 11.9% are Arts & Cultural Institutions
    - 10.7% are Lodging Facilities

Localhood (N=423-454)

- 36.9% have less than 4 employees
- 51.1% serve rural areas and 25.3% statewide
- 41.2% are Attractions & Events and 34.9% are Tourism Asset Businesses
    - 19.8% are Restaurants/Bars
    - 11.7% are Arts & Cultural Institutions
    - 10.1% are Lodging Facilities

Share why your organization is not currently participating or has never participated in the programs.

Arrivalist Research Co-op Program

- Unaware of program/unfamiliar/unsure – 165
- Budget/cost/funding – 34
- Not applicable/not needed/use a different vendor – 34
- Don’t know how/lack understanding/need more info – 14
- Lack of staff/time – 11
- Another group already does - 6
- Just bought business/new to state – 3
- No one has reached out/no opportunity – 3
- Availability – 2
- International travel agency – 1
- Transportation – 1

Destination Iowa

- Unaware/unfamiliar/need more info – 104
- Not applicable – 23
- Not a good fit for project/no opportunity – 21
- Budget/funding/high match – 20
- Lack of staff/time – 11
- Applied, not approved for grant/not eligible – 9
- Done by another group – 7
- New to business/state – 5
- Haven’t been offered/contacted – 3
- None – 2
- Plan to apply - 2
- Local investment – 1
- Not enough board support – 1

Enhance Iowa/Community Attraction and Tourism Program (CAT)

- Unaware/unfamiliar/need more information – 121
- Not applicable/no need – 26
- Not a good fit for project/projects not eligible – 24
- Lack of staff/time – 14
- Done by another group/not my area – 10
- Don’t qualify/grant requirements/high match – 8
- Lack of funds/budget – 8
- Will apply in the future - 5
- Don’t know/not interested – 4
- Just bought business/new to position – 4
- Too small to take advantage of the program – 3
- No one has reached out – 1
- Transportation – 1

Iowa Tourism Office Marketing Co-op Program

- Unaware/unfamiliar/need more information – 124
- Budget/Cost/no matching funds – 33
- Not applicable/no need – 26
- Lack of staff/time – 10
- Not sure/unsure if qualify – 6
- Done by another group – 4
- Just bought business/new to position – 4
- Didn’t apply/no interest – 3
- Too small to participate – 3
- No one reached out/no opportunity – 2
- Haven’t been offered – 1
- Not ready - 1

Iowa Tourism Marketing Grant Program (ITG)

- Unaware/unfamiliar/need more info – 133
- Not applicable/no need – 21
- Lack of staff/time – 17
- Not granted funding/did not qualified – 9
- Budget/costs – 7
- Aware but have not participated/applied – 5
- Just bought business/new to position – 4
- Done by another group – 3
- Project not eligible – 3
- Too small to participate – 3
- No one reached out/no opportunity – 2
- Transportation - 1

Localhood

- Unaware/unfamiliar/need more info – 178
- Not applicable/no need – 23
- Lack of staff/time – 19
- Just bought business/New to position -5
- Done by another group – 4
- Lack of budget/funds/cost -4
- Plan to apply – 4
- Recently aware/investigating – 3
- No interest – 1
- No one has reached out – 1
- No opportunity – 1
- Transportation - 1

Regional Sports Authority District Program (RSAD)

- Unaware/unfamiliar/need more info – 123
- Not applicable /no need/no events – 114

- Do not qualify/no projects eligible – 14
- Lack of budget/funds/cost – 7
- Lack of time/staff – 6
- Done by another group -3
- Just bought business/new to position – 3
- Too small – 3
- Not interested – 2
- City is not ready – 1
- Haven't been offered – 1
- No one reached out – 1
- Participated in the past - 1
- Transportation – 1

Meet in Iowa

- Unaware/unfamiliar/need more info – 173
- Not applicable/no need/no interest – 33
- Project not eligible/did not fit – 14
- Lack of time/staff – 12
- Applied, not accepted/do not qualify – 8
- No meeting space/no event hosting – 8
- Done by another group -7
- Just bought business/new to position – 5
- Lack of budget/funds/cost – 4
- Use in the future – 2
- Have not been offered – 1
- No one reached out – 1
- Recently aware – 1
- Transportation – 1

Sports Tourism Program

- Unaware/unfamiliar/need more info – 126
- Not applicable/no need/no sporting events – 106
- Do not qualify/don't meet requirements – 10
- Project not eligible/not a good fit – 9
- Cost/budget – 6
- Lack of staff/time – 6
- Just bought business/new to position – 4
- Done by another department – 3
- Looking for opportunity – 2
- Not interested – 2
- Too small/rural to participate – 2
- City is not ready – 1
- No one reached out -1
- Transportation -1

Travel Iowa Advertising

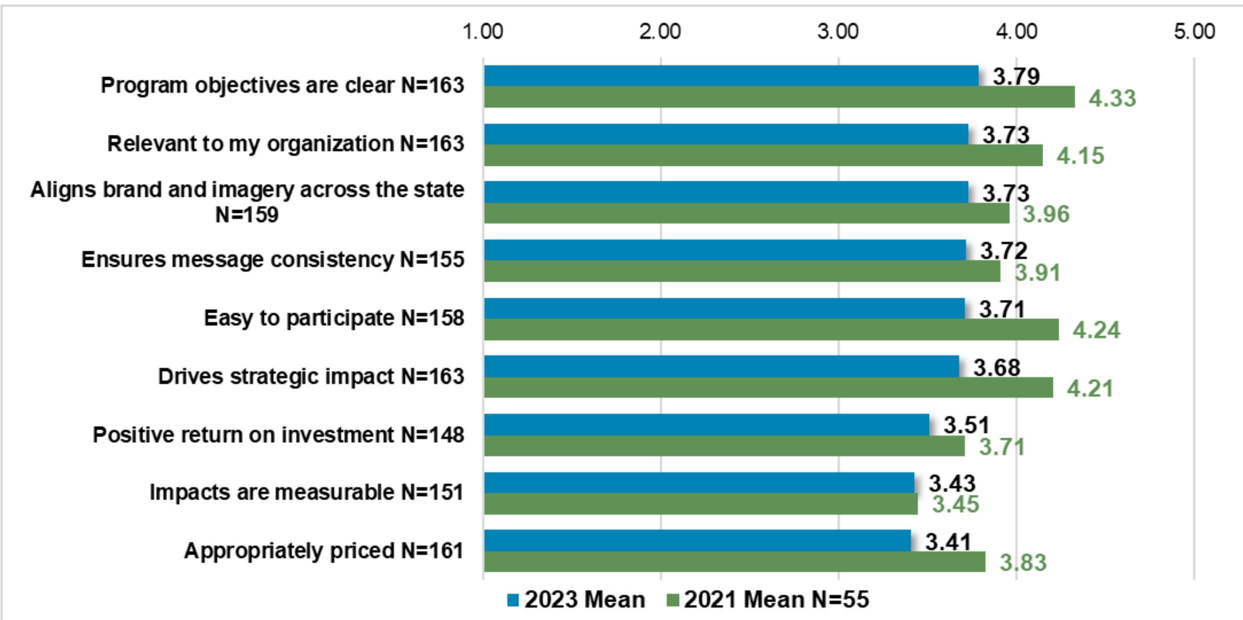
- Unaware/unfamiliar/need more info – 54
- Cost/budget – 29
- Not applicable/no need – 14
- Lack of staff/time – 6
- May use in future – 4
- Done by another department – 3
- Focus on different market/target – 3
- Just bought business/new to position – 3
- No one reached out/no opportunity – 3
- Not granted funding/didn't qualify – 3
- Used in the past – 2
- Info in Travel Iowa – 1
- Limited participation – 1
- Small rural town – 1

Travel Iowa Website Listings

- Unaware/unfamiliar/need more info – 62
- Not applicable/no need – 10
- Lack of staff/time – 4
- Done by another department/not my area – 3
- Haven't been offered/no one reach out/invitation only – 3
- Lack of funds/cost – 3
- Not our target/market – 3
- Plan to use in the future - 3
- Just bought business/ new to position – 2
- Forgot – 1
- Small, rural town – 1
- Website was down – 1

Rate the degree to which you agree with the following statements regarding Iowa Tourism Office's Marketing Co-op Program as it relates to your organization.

As compared to 2021, 2023 means were down for every single statement, however, there was a larger sample size in 2023 which provides higher reliability. The mean range for each statement is fairly narrow for 2023, ranging from "Program objectives are clear" (3.79) to "Appropriately priced" (3.41).



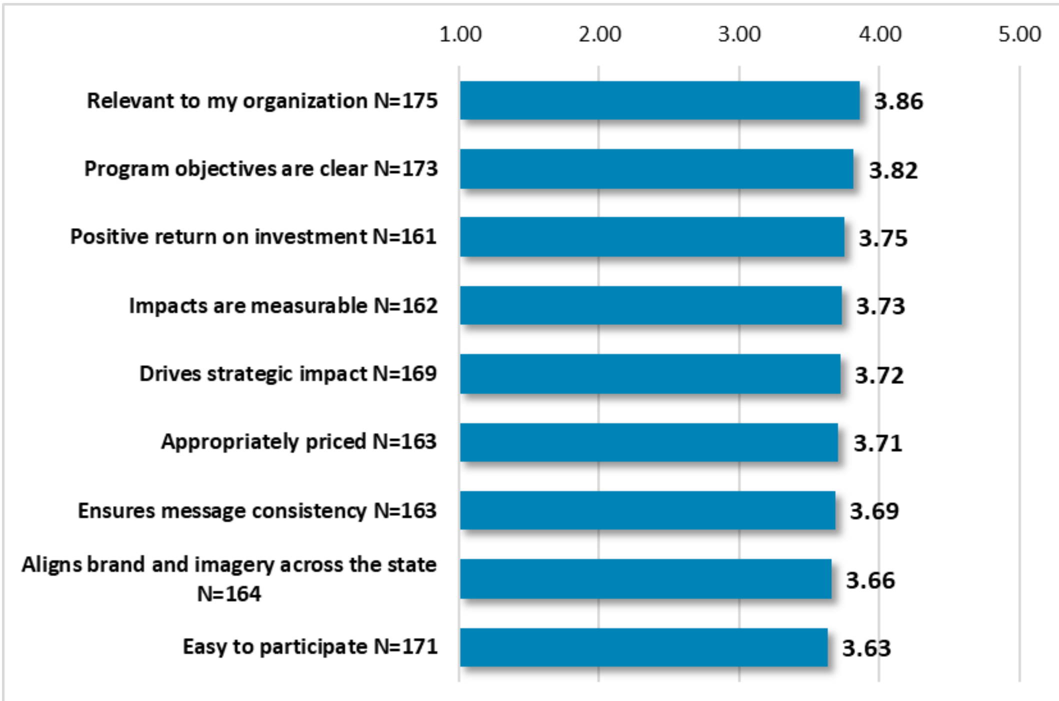
When asked to elaborate on their responses, respondents' comments are reflected in the word cloud below highlighting the single words mentioned most frequently.

Additionally, the open-end responses indicate that many respondents are unfamiliar with the program or have not participated in it. Budget constraints and the perception that the program is geared towards larger organizations are common concerns. Some respondents mention the difficulty in measuring the impact of the program and the lack of follow-up statistics. Additionally, there is a desire for more targeted and localized marketing, as well as more equitable promotion for smaller communities.

Best next first steps would be to explore ways to make the program more accessible and affordable for smaller organizations and communities with limited budgets. This could include offering cooperative advertising opportunities, providing more targeted and measurable impact data, and considering adjustments to the qualification criteria for grants and other opportunities. Additionally, it would be helpful to increase awareness and understanding of the program among those who are not familiar with it.

Rate the degree to which you agree with the following statements regarding Iowa Tourism Office's Marketing Grant Program as it relates to your organization.

Respondents report favorable scores for Iowa Tourism Marketing Grant Programs. There is a fairly narrow range of means with the highest being Relevant to my organization (3.86) and the lowest being Easy to participate (3.63).



When asked to elaborate on their responses, respondents' comments are reflected in the word cloud below highlighting the single words mentioned most frequently.

Additionally, the open-end responses provided discuss a variety of experiences and opinions about the marketing grant program. Some respondents have benefited from the program and found it helpful, while others have not participated or faced challenges in meeting the requirements. There are concerns about the program's communication, the difficulty in measuring impacts, and the competition between smaller communities and larger metro areas. Some respondents also mention the preference for digital-based programming and the need for more grant funds for different types of marketing.

Best next first steps for improving the grant program could include:

1. Increase awareness and communication about the program, its requirements, and its benefits.
2. Provide clearer guidelines on the types of projects that are more likely to be funded, such as digital-based programming.
3. Consider adjusting the matching requirements for communities with limited budgets.
4. Reevaluate the population cut-off and requirements to better accommodate small towns and rural areas.
5. Offer more support and resources for organizations that are interested in applying but may not have the necessary staff or expertise.
6. Continuously review and update the program's criteria to ensure it aligns with the state tourism office's strategic goals and the needs of the communities it serves

How can we enhance your participation in other marketing initiatives – website, travel, guide ads, social media, etc.?

Overall respondents' comments are reflected in the word cloud below with the single words mentioned most frequently being highlighted.

Additionally, the open-end responses indicate that participants are seeking more information and awareness about available programs and opportunities for promoting tourism. They mention the need for better communication, outreach, and affordability, especially for small businesses and rural communities. Some respondents suggest using social media, email updates, and local meetings to share information and make it more accessible. They also express interest in receiving guidance on how to participate in various initiatives and request more support in terms of funding and resources.

The most frequently mentioned idea in the responses is the need for more information and better communication about the available programs and opportunities, as well as making them more accessible and affordable for small businesses and organizations.

A first step would be to reach out to local organizations, such as the Chamber of Commerce, economic development offices, or tourism boards, to disseminate information about available marketing initiatives and opportunities. Additionally, encourage them to keep an eye out for emails or communications from Travel Iowa or other tourism-related organizations that may provide information on programs, webinars, or resources to help promote their community and its attractions.

Do you have any ideas for new or different programs, co-op options or grant programs to consider for the future?

Overall respondents' comments are reflected in the word cloud below with the single words mentioned most frequently being highlighted.

Additionally, the open-end responses suggest that there is a desire for more support and resources for rural areas, agritourism startups, and small businesses. Respondents mention the need for assistance in marketing, advertising, and grant funding for various purposes, such as outdoor recreation, park development, and historic building conversion. They also express interest in more training, educational programs, and collaboration between different regions and communities. Some respondents feel that there is a focus on larger cities and attractions, and they would like to see more emphasis on promoting rural tourism and smaller communities. Additionally, there is a call for more diverse grant programs, targeting different types of events and attractions, as well as support for workforce development and infrastructure improvements.

The top recommendation from the responses is to provide more support and funding for rural areas and small towns, focusing on their unique attractions and tourism opportunities. This can be achieved through grants, marketing assistance, and promoting collaboration between communities. Additionally, there is a desire for more advertising, both within Iowa and in neighboring states, to showcase the diverse experiences available throughout the state.

Respondents appreciate various aspects of the current programs and offerings, such as grant programs for marketing initiatives, educational riverboat tours, state parks, and the Wine and Beer app on the website. They also value the opportunities for small businesses and rural areas, as well as the focus on outdoor recreation, agritourism, and historical attractions. Additionally, respondents like the idea of promoting unique experiences and hidden gems throughout the state, including small towns and lesser-known attractions. Some concerns mentioned include a perceived focus on larger communities and urban areas, lack of support for small businesses, and a need for more representation of rural areas and attractions.

Based on the comments, we suggest the following best first steps for Iowa organizations. Encourage organizations to explore the various programs, grants, and opportunities and identify which ones are most relevant to their specific needs and goals. Promote reaching out to Travel Iowa or other relevant regional/local organizations to learn more about opportunities and how to access them. Additionally, counsel them to consider collaborating with other local businesses, organizations, and communities to share resources, ideas, and best practices for promoting tourism in their area.

Appendix A – Survey Questions

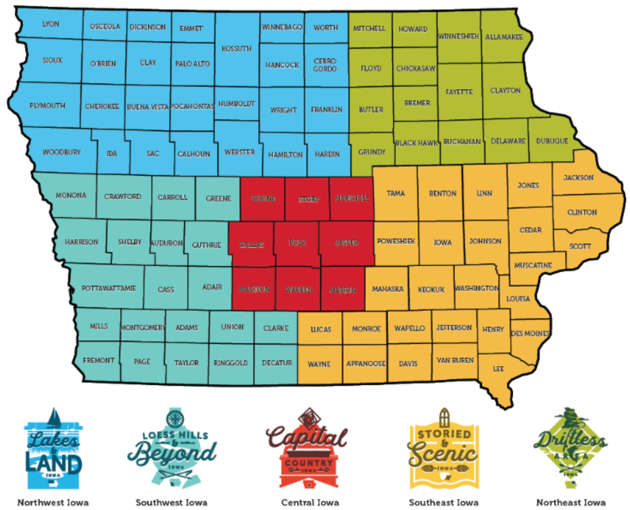
Demographics

1. Which one of the following best describes your tourism organization?
   - ❍ Arts & Cultural Institution (includes museums, symphonies, botanical gardens, etc.)
   - ❍ Attractions (including theme parks, zoos, aquariums, water parks, etc.)
   - ❍ Brewery, Winery, Distillery
   - ❍ Casino
   - ❍ Chamber of Commerce
   - ❍ Destination Management Organization (DMO) or Convention and Visitors Bureau (CVB)
   - ❍ Economic Development Organization
   - ❍ Entertainment/Sports/Performing Arts Venues/Civic, Convention or Expo Center
   - ❍ Festivals and Events/Sports Events
   - ❍ Iowa EDA Main Street Iowa Community
   - ❍ Lodging Facilities – excluding casinos (includes hotels, Airbnb's, bed and breakfasts, etc.)
   - ❍ Outdoor Recreation Parks or Campgrounds (other than government parks/campgrounds/cabins)
   - ❍ Restaurants/Bars (includes mobile food services and catering)
   - ❍ Retail
   - ❍ State, County, or Municipal Governments and Organizations
   - ❍ State, County, or Municipal Parks/Campgrounds and Cabins
   - ❍ Transportation
   - ❍ Travel Services
   - ❍ Tribal Organizations
   - ❍ Other: ____

2. Please select any/all of the target audiences that are included in your organization's targeted marketing strategy.
   - ❑ Young adults seeking new adventures [Gen Z and Millennials: Ages 22-29]
   - ❑ Young families looking to make memories without breaking the bank [Millennials and Gen X: Ages 30-39]
   - ❑ Middle-aged adults with disposable income for travel [Gen X: Ages 40-55]
   - ❑ Older adults/retirees [Boomers: Ages 56 and older]
   - ❑ Meetings and conventions
   - ❑ Group travel
   - ❑ Sports travel
   - ❑ Other, please specify: ____

3. What is your organization's current total employment (excluding volunteers) at your location?
   - ❍ Fewer than 5
   - ❍ 5 to 9
   - ❍ 10 to 19
   - ❍ 20 to 49
   - ❍ 50 to 99
   - ❍ 100 to 249
   - ❍ 250 to 499
   - ❍ 500 to 999
   - ❍ 1,000 or more

4. Using the provided map, please choose the region that most closely aligns with the majority of your participation in travel and tourism.
   - ❍ Lakes & Land – Northwest Iowa
   - ❍ Loess Hills & Beyond – Southwest Iowa
   - ❍ Capital Country – Central Iowa
   - ❍ Driftless Area – Northeast Iowa
   - ❍ Storied & Scenic – Southeast Iowa
   - ❍ Statewide



5. Does your organization serve primarily urban, suburban, rural or statewide locations?
   - ❍ Urban
   - ❍ Suburban
   - ❍ Rural
   - ❍ Statewide

6. How many locations does your organization have in the state of Iowa?

   ____

7. What is the zip code for your organization's primary location?

   ____

Overall Perception of Tourism

8. Using the scale below, please rate your perception of how well the state is at promoting and growing tourism.
   - ❍ Excellent
   - ❍ Good
   - ❍ Neutral
   - ❍ Poor
   - ❍ Very poor
   - ❍ No basis for opinion

9. Using the scale below, please rate your perception of the quality of the state tourism efforts for the following general areas.
   - ❍ Excellent
   - ❍ Good
   - ❍ Neutral
   - ❍ Poor
   - ❍ Very poor
   - ❍ No basis for opinion
     - Overall marketing (e.g., Print, TV and social media, etc.)
     - Product development (e.g., state facilities such as parks, visitor centers, etc.)
     - Maintenance (e.g., upkeep of state facilities, etc.)

   Please share any ideas for improvement:
   ____
   ____

10. Using the scale below, please rate your perception of the quality of each area of Iowa's tourism offering.
    - ❍ Excellent
    - ❍ Good
    - ❍ Neutral
    - ❍ Poor
    - ❍ Very poor
    - ❍ No basis for opinion
      - Arts, Culture & Heritage Experiences
      - Attractions
      - Conventions, Conferences & Meetings
      - Destination Information (Websites, print collateral, visitor centers, etc.)
      - Events
      - Food & Beverage
      - Lodging & Accommodations
      - Nightlife & Entertainment
      - Outdoor & Recreational Activities
      - Retail & Shopping
      - Agritourism

    Please elaborate on any of your answers above:
    ____
    ____

11. Using the scale below, please rate your perception of the quality of each area of Iowa's tourism support structure.
   - ❍ Excellent
   - ❍ Good
   - ❍ Neutral
   - ❍ Poor
   - ❍ Very poor
   - ❍ No basis for opinion
     - State Government/Elected Official Support
     - Local Government/Elected Official Support
     - Inbound Transportation Options (inbound flights, highways, etc.)
     - In-market Transportation Options (public transportation, last mile, bikes, etc.)
     - International Tourism Readiness
     - Investor/Stakeholder/Partner Support
     - Pro-Tourism Policies and Regulation
     - Public Health Policies and Regulation
     - Public Infrastructure (roads, restrooms, parking, etc.)
     - Resident Support
     - Tourism Funding
     - Wayfinding

   Please elaborate on any of your answers above:

   ____
   ____

12. Using the scale below, please select your level of agreement with each statement.
   - ❍ Strongly agree
   - ❍ Agree
   - ❍ Neutral
   - ❍ Disagree
   - ❍ Strongly disagree
   - ❍ No basis for opinion
     - I believe the tourism industry has a bigger role to play in Iowa's economy.
     - I believe more tourism in Iowa would benefit its residents.
     - My community is ready to welcome visitors from all communities regardless of race, background, sexual orientation, religion, or ability.
     - I am worried about the impact tourism will have on our community culture.
     - I am worried about the impact tourism will have on Iowa's environment.
     - I am excited about the possibility that increased visitor spending could result in more funding for community services.
     - I am excited about the possibility that increased visitor spending could result in more support and growth for local businesses and services.
     - I believe Iowa is ready for more tourism.

   Please elaborate on any of your answers above:

   ____
   ____

13. Using the scale below, please select your level of agreement with each statement.
    - ❍ Strongly agree
    - ❍ Agree
    - ❍ Neutral
    - ❍ Disagree
    - ❍ Strongly disagree
    - ❍ No basis for opinion
        - Iowa is seen as racially and ethnically diverse.
        - Iowa is a place that can authentically welcome all communities regardless of race, background, sexual orientation, religion, or ability.
        - Iowa's marketing and promotional materials include people from all communities regardless of race, background, sexual orientation, religion, or ability.
        - Iowa has tourism experiences and products that appeal to people of diverse backgrounds regardless of race, background, sexual orientation, religion, or ability.

Marketing Budget and Staff

14. Please select the dollar range than best reflects your **annual advertising/paid media and promotions (visitor guides, brochures, digital and print media, social media, etc.) budget** based on a 3-year average for FY 2020, 2021, and 2022.
    - ❍ Less than $10,000
    - ❍ $10,000 - $24,999
    - ❍ $25,000 - $49,999
    - ❍ $50,000 - $74,999
    - ❍ $75,000 - $99,000
    - ❍ $100,000 – $249,000
    - ❍ $250,000 - $499,999
    - ❍ $500,000 - $999,999
    - ❍ $1,000,000 - $1,999,999
    - ❍ Over $2,000,000
    - ❍ Prefer not to answer

15. Please select the dollar range than best reflects your **annual Public Relations and influencer budget (not including paid advertising)** based on a 3-year average for FY 2020, 2021, and 2022.
    - ❍ $1 – $999
    - ❍ $1,000 - $4,999
    - ❍ $5,000 - $9,999
    - ❍ $10,000 – $19,999
    - ❍ $20,000 - $49,999
    - ❍ More than $50,000
    - ❍ Prefer not to answer
    - ❍ Not applicable

16. What percentage of your organization's tourism budget is spent on marketing (includes advertising/paid media and public relations)?
    - ❍ 10% or less
    - ❍ 11 to 20%
    - ❍ 21 to 40%
    - ❍ 41 to 60%
    - ❍ 61 to 80%
    - ❍ 81 to 100%

17. Select any/all geographies that reflect your organization's marketing and public relations footprint.
    - ❑ Iowa (In-state regional markets)
    - ❑ Colorado
    - ❑ Illinois
    - ❑ Indiana
    - ❑ Kansas
    - ❑ Michigan
    - ❑ Minnesota
    - ❑ Missouri
    - ❑ Nebraska
    - ❑ Ohio
    - ❑ South Dakota
    - ❑ Texas
    - ❑ Wisconsin
    - ❑ International
    - ❑ Other, please specify: _______________________

18. Approximately how many marketing related staff are employed at your organization?

    ____

19. Approximately how many tourism marketing related staff are employed at your organization?

    ____

20. Approximately how many total staff are employed at your organization?

    ____

Awareness and Utilization of State and Marketing Tourism Resources

21. Please indicate your level of awareness/familiarity with each of the following tourism-related grants, programs and marketing resources offered by the State of Iowa:
    - ❍ Very familiar
    - ❍ Somewhat familiar
    - ❍ Never heard of it
        - Arrivalist Research Co-op Program
        - Destination Iowa
        - Enhance Iowa / Community Attraction and Tourism Program (CAT)
        - Iowa Tourism Office Marketing Co-op Program
        - Iowa Tourism Marketing Grant Program (ITG)
        - Localhood *(free social media content creation tool)*
        - Meet in Iowa
        - Regional Sports Authority District Program (RSAD)
        - Sports Tourism Program
        - Travel Iowa Advertising *(e.g., travel guide ads, sponsored content, email/social media ads, lead program, etc.)*
        - Travel Iowa Website Listings

22. For each program listed, please select the appropriate level of your participation.
    - ❍ Current participant or applicant (skip to Q22)
    - ❍ Not currently participating, but have in the past
    - ❍ I've never participated
        - Arrivalist Research Co-op Program
        - Destination Iowa
        - Enhance Iowa / Community Attraction and Tourism Program (CAT)
        - Iowa Tourism Office Marketing Co-op Program
        - Iowa Tourism Marketing Grant Program (ITG)
        - Localhood *(free social media content creation tool)*
        - Meet in Iowa
        - Regional Sports Authority District Program (RSAD)
        - Sports Tourism Program
        - Travel Iowa Advertising *(e.g., travel guide ads, sponsored content, email/social media ads, lead program, etc.)*
        - Travel Iowa Website Listings

[Asked only to those who have never or are not currently participating in programs]

23. Please provide the reason you never or are not currently participating in the following programs.

    ____

[Asked only to those are very or somewhat familiar in Q20]

24. Rate the degree to which you agree with the following statements regarding Iowa Tourism Office's ***Marketing Co-op Program,*** as it related to YOUR ORGANIZATION. [Will include section for open-ended comments]
    - ❍ Strongly agree
    - ❍ Somewhat agree
    - ❍ Neither agree nor disagree
    - ❍ Somewhat disagree
    - ❍ Disagree
    - ❍ No basis for opinion
        - Program objectives are clear
        - Easy to participate
        - Drives strategic impact
        - Appropriately priced
        - Positive return on investment
        - Impacts are measurable
        - Relevant to my organization
        - Ensures message consistency
        - Aligns brand and imagery across regions

[Asked only to those are very or somewhat familiar in Q20]

25. Rate the degree to which you agree with the following statements regarding the ***Iowa Tourism Marketing Grant Program,*** as it related to YOUR ORGANIZATION. [Will include section for open-ended comments]
    - ❍ Strongly agree
    - ❍ Somewhat agree
    - ❍ Neither agree nor disagree
    - ❍ Somewhat disagree
    - ❍ Disagree
    - ❍ No basis for opinion
        - Program objectives are clear
        - Application process is reasonable for scale of the reward
        - Reporting requirements are reasonable for scale of the reward
        - Funding amounts enable meaningful impact
        - Responsive to the current needs of my organization
        - Reflects a fair and equitable approach to awarding funds

Advocacy

26. How can we enhance your participation in other marketing initiatives – website, travel guide ads, social media, etc.?

    ____

27. Do you have any ideas for new or different programs, co-op options or grant programs to consider for the future?

    ____

Appendix B – Significant Difference Statements

Statistical procedures such as crosstabs, independent t-tests and ANOVA were performed on the data set to identify significant differences between various segments. The following statements identify statistically significant differences by type of area served, organization type, and total staff size.

By Type of Area Served

Respondents in Urban areas (45.3%) reported a significantly higher target audience for meetings and conventions as compared to Suburban areas (26.7%), Rural areas (29.0%), and Statewide (27.7%).

Respondents in Rural areas (14.1%) reported a significantly lower target audience for sports travel as compared to Urban areas (34.7%) and Suburban areas (31.1%).

Respondents who spend less than $10,000 of their annual advertising/paid media and promotions budget reported a significantly higher usage in Rural areas (64.9%) compared to Urban areas (41.3%), Suburban areas (53.3%), and Statewide (52.3%).

Respondents who spend between $10,000 and $19,999 of their annual public relations and influencer budget reported a significantly higher usage in Urban areas (7.9%) compared to Suburban areas (2.8%), Rural areas (5.0%), and Statewide (3.8%).

Respondents who spend between $20,000 and $49,999 of their annual public relations and influencer budget reported a significantly higher usage in Urban areas (7.9%) compared to Suburban areas (2.8%), Rural areas (1.8%), and Statewide (3.8%).

Respondents who use Iowa marketing and public relations footprint reported a significantly higher usage in Rural areas (52.4%) compared to Urban areas (14.6%), Suburban areas (9.6%), and Statewide (23.4%).

Respondents who use Illinois marketing and public relations footprint reported a significantly higher usage in Urban areas (29.3%) and Statewide (36.2%) compared to Suburban areas (11.1%).

Respondents who use Missouri marketing and public relations footprint reported a significantly higher usage in Statewide areas (33.1%) compared to Urban areas (16.0%), Suburban areas (8.9%), and Rural areas (14.9%).

Respondents who use Nebraska marketing and public relations footprint reported a significantly higher usage in Urban areas (29.3%) and Statewide (36.9%) compared to Suburban areas (15.6%) and Rural areas (23.3%).

Respondents who use South Dakota marketing and public relations footprint reported a significantly higher usage in Statewide areas (17.7%) compared to Suburban areas (4.4%) and Rural areas (9.2%).

Respondents who are Somewhat Familiar with the Enhance Iowa/Community Attraction and Tourism Program reported those in Rural areas (33.6%) are significantly higher compared to Suburban areas (17.8%).

Respondents who are Very Familiar with the Enhance Iowa/Community Attraction and Tourism Program reported those in Rural areas (23.7%) are significantly higher compared to Suburban areas (13.3%).

Respondents who are Very Familiar with the Regional Sports Authority District Program reported those in Urban areas (21.3%) are significantly higher compared to Suburban areas (8.9%), Rural areas (8.0%), and Statewide (7.7%).

Respondents who are Very Familiar with the Travel Iowa Advertising reported those in Rural areas (36.3%) and Statewide (41.5%) are significantly higher compared to Urban areas (29.3%) and Suburban areas (20.0%).

Respondents who are Very Familiar with Travel Iowa Website Listings reported those in Statewide (43.8%) are significantly higher compared to Urban areas (29.3%) and Suburban areas (28.9%).

Respondents who have participated in the Iowa Tourism Marketing Grant Program in the past reported those in Rural areas (21.8%) and Statewide (16.2%) are significantly higher compared to those in Urban areas (8.0%) and Suburban areas (4.4%).

Respondents who currently participate in Meet in Iowa reported those in Urban areas (14.7%) are significantly higher compared to Suburban areas (2.2%), Rural areas (2.3%), and Statewide (5.4%).

Respondents in Rural areas (94.7%) are significantly more likely to not participate in Meet in Iowa compared to those in Urban areas (82.7%).

Respondents who currently participate in the Regional Sports Authority District Program reported those in Urban areas (16.0%) are significantly higher compared to Suburban areas (4.4%), Rural areas (2.7%), and Statewide (4.6%).

Respondents who currently participate in the Sports Tourism Program reported those in Urban areas (13.3%) are significantly higher compared to Suburban areas (6.7%), Rural areas (2.3%), and Statewide (4.6%).

Respondents who currently participate in Travel Iowa Advertising reported those in Suburban areas (6.7%) are significantly lower compared to Urban areas (25.3%), Rural areas (26.3%), and Statewide (33.8%).

Respondents who have participated in Travel Iowa Advertising in the past reported those in Rural areas (59.5%) and Statewide (24.8%) are significantly higher compared to Urban areas (7.4%) and Suburban areas (8.3%).

Respondents who currently participate in Travel Iowa Website Listings reported those in Suburban areas (20.0%) are significantly lower compared to Urban areas (40.0%), Rural areas (17.6%), and Statewide (18.5%).

Respondents who have participated in Travel Iowa Website Listings in the past reported those in Rural areas (17.6%) and Statewide (18.5%) are significantly higher compared to Urban areas (8.0%).

Respondents in Suburban areas (4.09) reported a significantly higher mean for Quality perception of food and beverage compared to Rural areas (3.71) and Statewide (3.68).

Respondents in Suburban areas (3.49) reported a significantly higher mean for Quality of Iowa's tourism support structure for Inbound Air Transportation Options compared to Urban areas (2.90) and Rural areas (3.08).

Respondents in Suburban areas (3.58) reported a significantly higher mean for Quality of Iowa's support structure for Resident Support compared to Rural Areas (3.18).

Respondents in Statewide areas (3.72) reported a significantly higher mean for level of agreement for "Iowa has tourism experiences and products that appeal to people of diverse backgrounds" compared to Urban areas (3.32).

By Organization Type

Tourism Organizations (72.3%) and Attractions & Events (72.9%) are significantly more likely to be targeting young adults seeking new adventures / Gen Z and Millennials ages 22-29 as compared to Tourism Asset Businesses (60.9%).

Tourism Organizations (95.3%) and Attractions & Events (86.2%) are significantly more likely to be targeting young families looking to make memories without breaking the bank / Millennials and Gen X ages 30-39 as compared to Tourism Asset Businesses (76.0%).

Tourism Organizations (40.5%) and Tourism Asset Businesses (36.3%) are significantly more likely to be targeting meetings and conventions as compared to Attractions & Events (20.0%).

Tourism Organizations (25.7%) and Tourism Asset Businesses (30.7%) are significantly more likely to be targeting sports travel as compared to Attractions & Events (11.0%).

Tourism Organizations (66.9%) are significantly more likely to primarily serve rural areas as compared to Attractions & Events (42.9%) and Tourism Asset Businesses (39.7%).

Attractions & Events (35.2%) are significantly more likely to primarily serve statewide as compared to Tourism Organizations (14.2%) and Tourism Asset Businesses (19.0%).

Tourism Organizations (mean of 3.94) reported a significantly higher rating for how well the state is doing at promoting and growing tourism as compared to Attractions & Events (mean of 3.74) and Tourism Asset Businesses (mean of 3.56).

Tourism Organizations (mean of 4.03) reported a significantly higher rating for the quality of the state tourism efforts with overall marketing as compared to Attractions & Events (mean of 3.61) and Tourism Asset Businesses (mean of 3.47).

Tourism Organizations (mean of 3.87) and Attractions & Events (mean of 3.77) reported a significantly higher quality perception of attractions as compared to Tourism Asset Businesses (mean of 3.52).

Tourism Organizations (mean of 3.88) reported a significantly higher quality perception for destination information as compared to Attractions & Events (mean of 3.63) and Tourism Asset Businesses (mean of 3.50).

Tourism Organizations (mean of 4.01) reported a significantly higher quality perception for outdoor & recreational activities as compared to Tourism Asset Businesses (mean of 3.74).

Tourism Organizations (mean of 3.66) reported a significantly higher quality perception for retail & shopping as compared to Attractions & Events (mean of 3.45) and Tourism Asset Businesses (mean of 3.40).

Tourism Asset Businesses (mean of 3.36) reported a significantly higher quality rating for Iowa's public health policies and regulation as compared to Tourism Organizations (mean of 3.09).

Attractions & Events (mean of 3.26) reported a significantly higher quality rating for Iowa's wayfinding as compared to Tourism Organizations (mean of 2.99).

Tourism Organizations (mean of 4.50) reported a significantly higher level of agreement with the statement, "I believe the tourism industry has a bigger role to play in Iowa's economy" as compared to Attractions & Events (mean of 4.33) and Tourism Asset Businesses (mean of 4.26).

Tourism Organizations (mean of 4.60) reported a significantly higher level of agreement with the statement, "I believe more tourism in Iowa would benefit its residents" as compared to Attractions & Events (mean of 4.43) and Tourism Asset Businesses (mean of 4.41).

Tourism Asset Businesses (mean of 4.21) reported a significantly higher level of agreement with the statement, "My community is ready to welcome visitors from all communities regardless of race, background, sexual orientation, religion, or ability" as compared to Attractions & Events (mean of 3.98).

Tourism Asset Businesses (mean of 2.11) reported a significantly higher level of agreement with the statement, "I am worried about the impact tourism will have on our community culture" as compared to Attractions & Events (mean of 1.97) and Tourism Organizations (mean of 1.72).

Tourism Asset Businesses (mean of 2.21) and Attractions & Events (mean of 2.22) reported a significantly higher level of agreement with the statement, "I am worried about the impact tourism will have on Iowa's environment" as compared to Tourism Organizations (mean of 1.95).

Tourism Organizations (mean of 4.53) reported a significantly higher level of agreement with the statement, "I am excited about the possibility that increased visitor spending could result in more funding for community services" as compared to Attractions & Events (mean of 4.34) and Tourism Asset Businesses (mean of 4.32).

Tourism Organizations (mean of 4.66) reported a significantly higher level of agreement with the statement, "I am excited about the possibility that increased visitor spending could result in more support and growth for local businesses and services" as compared to Attractions & Events (mean of 4.43) and Tourism Asset Businesses (mean of 4.45).

Tourism Organizations (mean of 4.44) reported a significantly higher level of agreement with the statement, "I believe Iowa is ready for more tourism" as compared to Attractions & Events (mean of 4.23) and Tourism Asset Businesses (mean of 4.29).

Tourism Asset Businesses (mean of 2.76) reported a significantly higher level of agreement with the statement, "Iowa is seen as racially and ethnically diverse" as compared to Tourism Organizations (mean of 2.39).

Tourism Asset Businesses (56.4%) and Attractions & Events (59.0%) are significantly more likely to spend 10% or less of their tourism budget on marketing as compared to Tourism Organizations (39.9%).

Tourism Organizations (16.2%) are significantly more likely to spend 21 to 40% of their tourism budget or marketing as compared to Attractions & Events (5.2%) and Tourism Asset Businesses (5.6%).

Tourism Organizations (34.5%) are significantly more likely to have Illinois in their marketing and public relations footprint as compared to Attractions & Events (24.3%) and Tourism Asset Businesses (16.8%).

Tourism Organizations (39.9%) are significantly more likely to have Minnesota in their marketing and public relations footprint as compared to Attractions & Events (24.3%) and Tourism Asset Businesses (19.0%).

Tourism Organizations (27.7%) are significantly more likely to have Missouri in their marketing and public relations footprint as compared to Attractions & Events (15.7%) and Tourism Asset Businesses (13.4%).

Tourism Organizations (35.8%) are significantly more likely to have Nebraska in their marketing and public relations footprint as compared to Attractions & Events (23.8%) and Tourism Asset Businesses (19.6%).

Tourism Organizations (30.4%) are significantly more likely to have Wisconsin in their marketing and public relations footprint as compared to Attractions & Events (18.1%) and Tourism Asset Businesses (15.1%).

Attractions & Events (6.2%) are significantly more likely to have International marketing and public relations footprints as compared to Tourism Organizations (2.7%) and Tourism Asset Businesses (1.7%).

Tourism Organizations reported significantly higher levels of familiarity as compared to Attractions & Events and Tourism Asset Businesses across all programs.

Tourism Organizations (mean of 1.82) reported a significantly higher level of familiarity with the Arrivalist Research Co-op Program as compared to Attractions & Events (mean of 1.21) and Tourism Asset Businesses (mean of 1.11).

Tourism Organizations (mean of 2.34) reported a significantly higher level of familiarity with the Destination Iowa program as compared to Attractions & Events (mean of 2.01) and Tourism Asset Businesses (mean of 1.57).

Tourism Organizations (mean of 2.21) reported a significantly higher level of familiarity with the Enhance Iowa / Community Attraction and Tourism Program (CAT) as compared to Attractions & Events (mean of 1.72) and Tourism Asset Businesses (mean of 1.23).

Tourism Organizations (mean of 2.10) reported a significantly higher level of familiarity with the Iowa Tourism Office Marketing Co-op Program as compared to Attractions & Events (mean of 1.58) and Tourism Asset Businesses (mean of 1.20).

Tourism Organizations (mean of 2.13) reported a significantly higher level of familiarity with the Iowa Tourism Marketing Grant Program as compared to Attractions & Events (mean of 1.63) and Tourism Asset Businesses (mean of 1.23).

Tourism Organizations (mean of 1.67) reported a significantly higher level of familiarity with Localhood as compared to Attractions & Events (mean of 1.26) and Tourism Asset Businesses (mean of 1.23).

Tourism Organizations (mean of 1.72) reported a significantly higher level of familiarity with Meet in Iowa as compared to Attractions & Events (mean of 1.26) and Tourism Asset Businesses (mean of 1.21).

Tourism Organizations (mean of 1.74) reported a significantly higher level of familiarity with the Regional Sports Authority District Program as compared to Attractions & Events (mean of 1.26) and Tourism Asset Businesses (mean of 1.37).

Tourism Organizations (mean of 1.66) reported a significantly higher level of familiarity with the Sports Tourism Program as compared to Attractions & Events (mean of 1.21) and Tourism Asset Businesses (mean of 1.26).

Tourism Organizations (mean of 2.49) reported a significantly higher level of familiarity with Travel Iowa Advertising as compared to Attractions & Events (mean of 2.08) and Tourism Asset Businesses (mean of 1.80).

Tourism Organizations (mean of 2.55) reported a significantly higher level of familiarity with Travel Iowa Website Listings as compared to Attractions & Events (mean of 2.10) and Tourism Asset Businesses (mean of 1.67).

Tourism Organizations are significantly more likely to be currently participating in or previously participated in every program with the exception of the Regional Sports Authority District Program (RSAD).

Tourism Organizations (20.9%) are significantly more likely to be currently participating in the Arrivalist Research Co-op Program as compared to Attractions & Events (2.4%) and Tourism Asset Businesses (1.7%).

Tourism Organizations (23.6%) and Attractions & Events (16.2%) are significantly more likely to be currently participating in Destination Iowa as compared to Tourism Asset Businesses (3.9%).

Tourism Organizations (28.4%) are significantly more likely to have participated in the Enhance Iowa / Community Attraction and Tourism Program in the past as compared to Attractions & Events (15.7%) and Tourism Asset Businesses (3.9%).

Tourism Organizations (25.7%) are significantly more likely to be currently participating in the Iowa Tourism Office Marketing Co-op Program as compared to Attractions & Events (10.0%) and Tourism Asset Businesses (2.8%).

Tourism Organizations (19.6%) are significantly more likely to have participated in the Iowa Tourism Office Marketing Co-op Program in the past as compared to Attractions & Events (10.0%) and Tourism Asset Businesses (5.0%).

Tourism Organizations (14.9%) are significantly more likely to be currently participating in the Iowa Tourism Marketing Grant Program as compared to Attractions & Events (8.1%) and Tourism Asset Businesses (2.2%).

Tourism Organizations (30.4%) are significantly more likely to have participated in the Iowa Tourism Marketing Grant Program in the past as compared to Attractions & Events (16.7%) and Tourism Asset Businesses (3.4%).

Tourism Organizations (23.0%) are significantly more likely to be currently participating in Localhood as compared to Attractions & Events (7.6%) and Tourism Asset Businesses (8.4%).

Tourism Organizations (9.5%) are significantly more likely to be currently participating in Meet in Iowa as compared to Attractions & Events (3.8%) and Tourism Asset Businesses (2.2%).

Tourism Organizations (9.5%) are significantly more likely to be currently participating in the Sports Tourism Program as compared to Attractions & Events (3.3%) and Tourism Asset Businesses (2.8%).

Tourism Organizations (39.2%) are significantly more likely to be currently participating in Travel Iowa Advertising as compared to Attractions & Events (24.3%) and Tourism Asset Businesses (17.3%).

Tourism Organizations (29.1%) and Attractions & Events (25.2%) are significantly more likely to have participated in Travel Iowa Advertising in the past as compared to Tourism Asset Businesses (15.1%).

Tourism Organizations (59.5%) are significantly more likely to be currently participating in Travel Iowa Website Listings as compared to Attractions & Events (45.7%) and Tourism Asset Businesses (16.8%).

Tourism Organizations (mean of 3.92) reported a significantly higher level of agreement with the statement that "Program objectives are clear" for the Iowa Tourism Office's Marketing Co-op Program as compared to Tourism Asset Businesses (mean of 3.37).

Tourism Organizations (mean of 3.96) reported a significantly higher level of agreement that there is a "Positive return on investment" for the Iowa Tourism Marketing Grant Program as compared to Tourism Asset Businesses (mean of 3.45).

Tourism Organizations (mean of 3.82) reported a significantly higher level of agreement that the program "Aligns brand and imagery across the state" for the Iowa Tourism Marketing Grant Program as compared to Tourism Asset Businesses (mean of 3.43).

By Total Staff Size

Respondents with 15 or more employees (80.6%) reported significantly less targeting to middle aged adults with disposable income for travel compared to those with less than 4 employees (88.6%) and those with 4-14 employees (89.9%).

Respondents with 15 or more employees (74.5%) reported significantly less targeting to older adults/retirees/Boomers compared to those with less than 4 employees (86.2%) and those with 4-14 employees (91.7%).

Respondents with less than 4 employees (22.9%) reported significantly less targeting for meetings and conventions compared to those with 4-14 employees (23.1%) and more than 15 employees (27.3%).

Respondents who spend less than $10,000 on annual advertising/paid media reported those with less than 4 employees (67.6%) and 4-14 employees (62.1%) are significantly higher compared to those with more than 15 employees (38.2%).

Respondents who spend $25,000 to $49,9990 on annual advertising/paid media reported those with more than 15 employees (11.5%) are significantly higher compared to those with less than 4 employees (4.8%) and those with 4-14 employees (6.5%).

Respondents who spend $1 to $999 on annual public relations and influencer budget reported a significantly higher usage for businesses with less than 4 employees (54.0%) and 4-14 employees (51.1%) compared to those with 15 more employees (36.9%).

Respondents who spend $10,000 to $19,999 on annual public relations and influencer budget reported a significantly higher usage for businesses with 15 or more employees (8.5%) compared to those with less than 4 employees (4.0%) and those with 4-14 employees (2.1%).

Respondents who are Somewhat Familiar with the Arrivalist Research Co-op Program reported those with less than 4 employees (46.1%) are significantly higher compared to those with 4-14 employees (27.6%) and those with more than 15 employees (26.3%).

Respondents who are Not Familiar with Enhance Iowa/Community Attraction and Tourism Program reported businesses with 15 or more employees (68.5%) are significantly lower compared to those with less than 4 employees (43.3%) and those with 4-14 employees (46.2%).

Respondents who are Somewhat Familiar with Enhance Iowa/Community Attraction and Tourism Program reported businesses with 15 or more employees (15.8%) are significantly lower compared to those with less than 4 employees (33.3%) and those with 4-14 employees (31.4%).

Respondents who are Not Familiar with Iowa Tourism Office Marketing Co-op Program reported businesses with 15 or more employees (67.9%) are significantly higher compared to those with less than 4 employees (49.5%).

Respondents who are Very Familiar with Iowa Tourism Office Marketing Co-op Program reported businesses with less than 4 employees (23.8%) are significantly higher compared to those with 4-14 employees (15.4%) and those with more than 15 employees (12.1%).

Respondents who are Somewhat Familiar with Iowa Tourism Marketing Grant Program reported businesses with less than 4 employees (32.9%) are significantly higher compared to those with more than 15 employees (18.8%).

Respondents who are Very Familiar with Iowa Tourism Marketing Grant Program reported businesses with less 4 employees (23.8%) are significantly higher compared tro those with more than 15 employees (12.7%).

Respondents who are Somewhat Familiar with Travel Iowa Advertising reported businesses with less than 4 employees (46.2%) and those with 4-14 employees (43.2%) are significantly higher compared to those with more than 15 employees (33.9%).

Respondents who are Very Familiar with Travel Iowa Website Listings reported businesses with less than 4 employees (44.3%) are significantly higher compared to those with 4-14 employees (33.7%) and those with more than 15 employees (28.5%).

Respondents who currently participate in Destination Iowa reported businesses with 4-14 employees (20.1%) and those with more 15 employees (14.5%) are significantly higher compared to those with less than 4 employees (8.6%).

Respondents who currently participate in the Enhance Iowa/Community Attraction and Tourism Program reported businesses with 4-14 employees (10.7%) are significantly higher compared to those with more than 15 employees (3.0%).

Respondents who have participated in the Enhance Iowa/Community Attraction and Tourism Program in the past reported businesses with 4-14 employees (19.5%) are significantly higher compared to those with more than 15 employees (10.9%).

Respondents who have participated in the Iowa Tourism Marketing Grant Program in the past reported businesses with less than 4 employees (21.4%) are significantly higher compared to those with more than 15 employees (8.5%).

Respondents who currently participate in Meet in Iowa reported businesses with 4-14 employees (9.5%) are significantly higher compared to those with less 4 employees (1.9%) and those with more than 15 employees (3.6%).

Respondents who currently participate in the Regional Sports Authority District Program reported businesses with 4-14 employees (9.5%) are significantly higher compared to those with less than 4 employees (2.4%) and those with more than 15 employees (4.8%).

Respondents who currently participate in the Sports Tourism Program reported businesses with 4-14 employees (10.7%) are significantly higher compared to those with less than 4 employees (1.0%) and those with more than 15 employees (3.6%).

Respondents who currently participate I Travel Iowa Advertising reported businesses with less than 4 employees (31.4%) and those with 4-14 employees (26.6%) are significantly higher compared to those with more than 15 employees (17.6%).

Respondents who currently participate in Travel Iowa Website Listings reported businesses with less than 4 employees (49.0%) and those with 4-14 employees (39.6%) are significantly higher compare to those with more than 15 employees (27.3%).

Respondents with more than 15 employees (3.75) reported a significantly higher mean in Quality Perception in Agritourism compared to those with less than 4 employees (3.47).

Respondents with more than 15 employees (3.25) reported a significantly higher mean in Quality of Iowa's tourism support structure (Investor/Stakeholder/Partner Support) compared to those with less than 4 employees (3.00).

Respondents with more than 15 employees (3.34) reported a significantly higher mean in Quality of Iowa's tourism support structure (Local Government/Elected Official Support) compared to those with less than 4 employees (3.03).

Respondents with more than 15 employees (3.86) reported a significantly higher mean in Iowa Tourism Office's Marketing Co-op Program agreement compared to those with 4-14 employees (3.67).