



IOWA TOURISM OFFICE

2022 ANNUAL REPORT

travel
IOWA®



The Iowa Tourism Office is the official voice of the state's tourism industry and is part of the Iowa Economic Development Authority (IEDA). The office works collaboratively with Iowa's destinations and attractions to increase visitation, enhance economic impact of travel, and market Iowa to travelers.

ECONOMIC IMPACT OF TOURISM

The Legislature appropriated \$1.1 million to the IEDA in fiscal year 2022 for marketing, advertising and strategic planning implemented by the Iowa Tourism Office - well below the value of tourism to Iowa.

In calendar year 2021, tourism was responsible for \$6.1 billion in direct visitor spending in Iowa and a \$9.4 billion total economic impact. More than 65,000 Iowans are employed by the tourism industry and tourism spending generates a total of \$1 billion in state and local taxes. In fact, Iowa would have to tax each household in Iowa an additional \$786 per year to replace visitor-generated tax revenue in 2021. (Source: *Tourism Economic Impact Report, 2022*)

\$521 MILLION
LOCAL TAX REVENUES

\$480 MILLION
STATE TAX REVENUE

MARKETING CAMPAIGN OVERVIEW

When people from other states see Iowa on TV or online, they want to visit. When they visit, they are more likely to stay. This is why IEDA's visitor and talent attraction strategies fit hand in glove through its This is Iowa initiative. IEDA's marketing is helping Iowa address one of its major challenges: population. The state must attract more people – visitors and residents – from other states.

The "This is Iowa" campaign was built on a significant research study, with two key findings:

1. Most people simply don't know enough about the state to form an accurate opinion.
2. Tourism is critical: two-thirds of U.S. adults say they have seriously considered moving somewhere after visiting.

TARGET AUDIENCES

Our campaign messaging, audience and tactics are all based on research and measured for greatest impact. Based on the research, the consumer target audience has been divided into three sub-segments, recognizing that those at different life stages have different motivators and access information differently.

Location: Adults living in Midwest states, including Iowa, or with an affinity/connection to Iowa plus stretch markets, such as San Francisco, Detroit, Dallas and Denver



YOUNG ADULTS

(Gen Z and Millennials ages 22 to 29)
looking to start and/or grow their career and to experience new things.



YOUNG FAMILIES

(Millennials and Gen X ages 30 to 39)
wanting to make memories and find work/life balance.



MIDDLE AGED ADULTS

(Gen X and Boomers ages 40 to 55)
who have disposable income and may recommend Iowa to younger generations

MESSAGING

Our research has found facts about Iowa's tourism attractions and business-friendly attributes both equally increased favorability toward Iowa, interest in visiting and considering Iowa as a place to live. Messages are focused on the topics best received in the research:

1. Affordability of travel and cost of living/doing business
2. Economic viability of communities and careers
3. Natural beauty for visiting and quality of life
4. Culture and lifestyle, from art to festivals, breweries and restaurants

SOUL OF IOWA CAMPAIGN

The Soul of Iowa marketing campaign has been particularly successful.

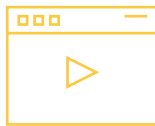
The Soul of Iowa was created with the goal of capturing the attention of travelers and breaking stereotypes about the state. Storytelling was done through incredible drone video. IEDA invited a crew of drone pilots who were unfamiliar with Iowa to experience and show off Iowa from a whole new perspective and tell their own story of uncovering Iowa's hidden gems.

Soul of Iowa was launched in April 2022 with a fully integrated marketing campaign that included drone "fly throughs" of four of Iowa's hidden gems – the Arnolds Park Amusement Park, downtown Decorah, Des Moines' Lauridsen Skatepark and the Indianola National Balloon Classic event.

The campaign also included a red carpet premiere event; the creation of a microsite, soulofiowa.com; media placements and paid integrations; connected TV, online video and display ads; marketing integrations with digital partners; a stakeholder toolkit; an influencer campaign; and paid and organic social media campaigns. In total, the campaign drove:



223.5 MILLION
MEDIA IMPRESSIONS



21 MILLION
VIDEO PLAYS



20 MILLION
SOCIAL MEDIA
IMPRESSIONS



70,000
WEBSITE VISITS

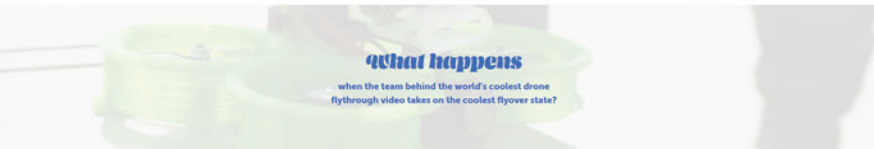
Most important, we saw an increased brand lift for the state. Per survey data from late summer 2022, 33% of job seekers and 26% of travelers from across the US reported having seen Iowa advertising and 80% of them said the campaign made them more likely to consider traveling to Iowa.

Additional marketing highlights from 2022 include:

- A relaunch of traveliowa.com, which is visited by more than two million people annually.
- Printing and distribution of 60,000 spring/summer and 40,000 fall/winter Iowa Travel Guides
- Monthly e-newsletters to a list of 105,000 travelers.
- Creation of a robust inventory of photo and video assets that brings Iowa to life for visitors and reflects the state's year-round beauty
- Total advertising (paid and earned) impressions of 2.75 billion across channels.

These efforts resulted in a total of 12 million tracked visits from out-of-state travelers in fiscal year 2022, 74.5% of which resulted in at least one overnight.

(Source: Arrivalist)



See Iowa from a whole new perspective

From the ground, you'll be surprised at what you find in Iowa. The communities and people welcome visitors with open arms, excited to show off what this state is truly about. Great people, Iowa kindness, vibrant energy and optimism paired with all the thrills make Iowa a place to remember.

Join us as we explore what makes Iowa much more than meets the eye.

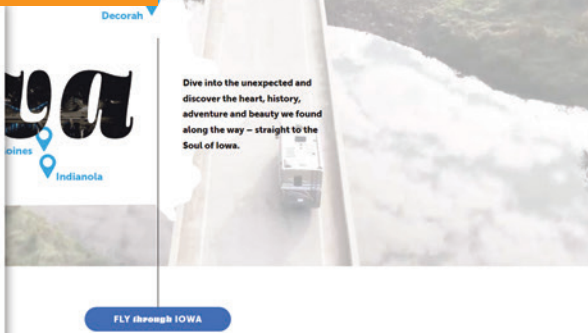
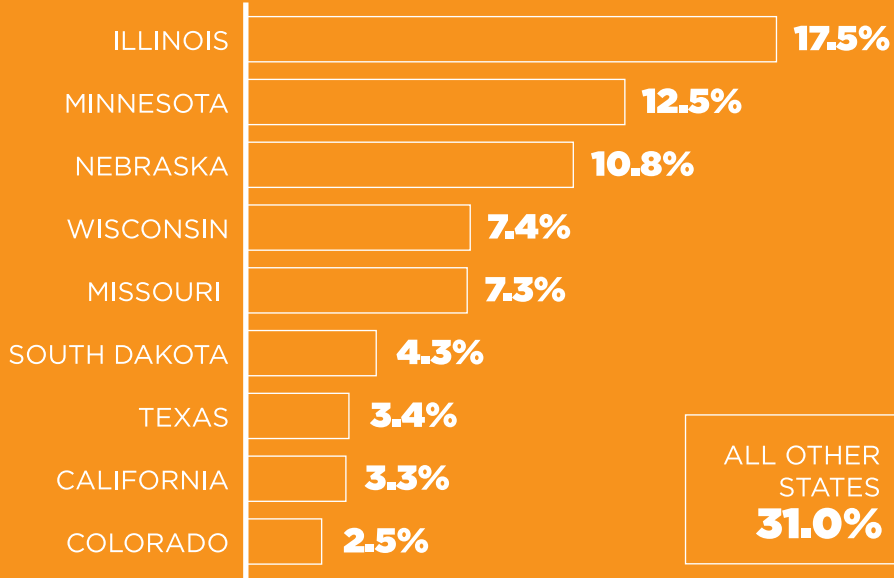


**Culture.
Adventure.
Connection.**



SHARE OF TRIP VOLUME

OUT-OF-STATE VISITATION, TOP 10 STATES



nouhball This might be the best travel destination video for a U.S. state I've seen. Love the creative direction and idea behind it. @jaybyrdfilms is the one take king

5w 1 like Reply

daky007 How do you get to this place? Postcode or area name

17w Reply

tschmidt5608 Who ever said Iowa was flat? 🤔

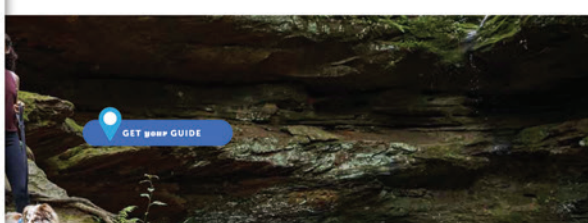
17w Reply

insertflashname Props to the drone pilot!

18w 1 like Reply

mr_ford This video is INCREDIBLE 🤯🤯🤯

19w 1 like Reply



IOWA TOURISM STRATEGIC PLAN

In 2021, the Governor's Economic Recovery Advisory Board challenged the tourism industry to turn Iowa into a destination for travelers. As part of its work, the advisory board accepted a recommendation to develop a statewide strategic plan for tourism. In May 2021, through a competitive bidding process, the Iowa Economic Development Authority selected Coraggio Group to lead the industry through a comprehensive strategic planning process, the results of which are outlined in the following pages.

Beginning in the summer of 2021, hundreds of industry members engaged in this work through surveys, listening sessions, interviews, working groups and more. The process included discussions about Iowa's destination vision, how to boost the profile of tourism in the state and, ultimately, how to increase the economic impact of travel and hospitality.



We invite curious explorers to discover Iowa as an extraordinary adventure.

The strategic planning process resulted in the creation of five imperatives for the tourism industry:

1. Unify the industry around a shared long-term vision
2. Amplify the awareness of Iowa's tourism brand
3. Ensure Iowa's tourism experience is welcoming to all
4. Ensure tourism readiness
5. Drive an increase in long-term tourism investments

During implementation planning of the strategic plan, imperatives were prioritized based on several factors, including impact, scope and work already underway. Progress on the first two imperatives has begun and the remaining imperatives of this five-year plan will be initiated in 2023 and beyond.

IMPERATIVES	OBJECTIVES	INITIATIVES
<p>Unify industry around shared long-term vision</p>	<ul style="list-style-type: none"> Encourage 100% of local, regional and state tourism organizations (by 2025) to pledge support for Iowa tourism’s shared long-term vision and strategic plan goals. Engage 100% of all stakeholders in at least one statewide event, meeting and/or program annually by 2027 	<ul style="list-style-type: none"> Develop communications plan in support of strategic plan imperatives to align stakeholders and influence awareness, advocacy, and engagement. Establish and enable statewide industry networking, mentorship, collaboration infrastructure, and resource-sharing framework.
<p>Amplify awareness of Iowa’s tourism brand</p>	<ul style="list-style-type: none"> Attain 5% growth in year-over-year visitor spending through 2027. Achieve 65% of total visitation from out-of-state visitors by 2027. 	<ul style="list-style-type: none"> Communicate and develop statewide destination messaging and partner engagement campaign, toolkits, and tactics. Continue to invest in and share relevant data and research to inform strategic insights and drive strategic campaign development, audience expansion and economic impact.
<p>Ensure Iowa’s tourism experience is welcoming to all</p>	<ul style="list-style-type: none"> Improve Iowa’s tourism reputation as “Welcoming to all” (Situation Assessment, Fig. 41), by raising score to an average of 4.0 by 2027. Commit 15% of resources provided (grants, marketing, etc.) to support tourism diversity, equity and inclusion initiatives. 	<ul style="list-style-type: none"> Conduct Diversity, Equity & Inclusion market research to identify program needs, drive resource development and ensure resources and experiences are in alignment with DE&I and accessibility best practices. Establish an incentive for grant programs to encourage alignment and partnership with DE&I principles and improve accessibility for diverse communities. Develop improved partnership opportunities with Iowa’s Office of Human Rights, Iowa’s Civil Liberties Union and other representative organizations.
<p>Ensure tourism readiness</p>	<ul style="list-style-type: none"> Engage 75% of all local destinations/ attractions in statewide tourism readiness assessments and training programs by 2027. Achieve year-over-year increase in visitor and resident sentiment scores based on 2022 baseline. Increase investment in readiness infrastructure (i.e. wayfinding, parking, safety, sustainability, etc.) based on 2022 baseline. 	<ul style="list-style-type: none"> Develop resource toolkits that leverage best practices and templates for use by attractions, DMOs and industry professionals. Establish a framework for public/private partnerships, and incentive and grant programs to encourage investment in wayfinding, technology and infrastructure updates.
<p>Drive an increase in long-term tourism investments</p>	<ul style="list-style-type: none"> Generate a 5% increase year-over-year in tourism revenue and taxes generated through 2027. Drive an increase in public (local, regional, state) and private investments to support Iowa’s tourism marketing and development based on 2022 baseline. 	<ul style="list-style-type: none"> Explore opportunities to align existing state resources (IEDA/IFA, DCA, DNR, DOT, IDALS, etc.) to tourism infrastructure needs that benefit both visitors and residents. Catalog tourism infrastructure needs and identify funding sources in collaboration with local/state/federal economic development organizations, natural resources agencies and private industry leadership. Explore growth-dependent funding options to increase resources available to support tourism.

Imperative 1: Unify Industry Around a Shared Long-Term Vision

The strategic planning process identified a need to build collaboration among the tourism industry. The intent of this imperative is to improve communication across the industry and encourage working together for a larger impact. Specific milestones and action steps that will be undertaken in the next year are outlined below.

MILESTONE	ACTION STEPS	TIMING
Define and create comprehensive database of tourism organizations and share database access.	<ul style="list-style-type: none"> • Review Sector Plan and update with current organizations. • Create shared CRM to house and track data. 	October 2022 – June 2023
Regularly gather info from industry to understand and address needs/track engagement.	<ul style="list-style-type: none"> • Develop & deploy survey using database. • Publish “State of the Industry” report annually 	January 2023 – March 2023
Establish regular touchpoints from the ITO and about strategic plan action.	<ul style="list-style-type: none"> • Hire tourism liaisons • Create outreach & engagement plan • Industry Partners website & E-Traveler enhancements • Establish & engage industry feedback groups 	October 2022 – December 2023
Create and support an industry and “internal” communications plan	<ul style="list-style-type: none"> • Convene a Tourism Advisory Council. • Deploy an internal public relations campaign. • Develop advocacy toolkit and resources • Support a mentorship program. 	March 2023 – December 2023

In alignment with this imperative and as a result of data gathered in the Iowa Tourism Industry Situation Assessment, IEDA also took steps to modernize the long-standing tourism region structure and provide support and resources to tourism entities across the state, regardless of membership status. Instead of providing funding to three tourism regional organizations, in September 2022, IEDA hired two full-time tourism liaisons to provide outreach and support statewide. The liaisons are tasked with providing outreach support to tourism partners and local organizations, acting as a vital conduit of information between the industry and IEDA, and supporting additional strategic plan imperatives in the coming years.

Imperative 2: Amplify Awareness of Iowa’s Tourism Brand

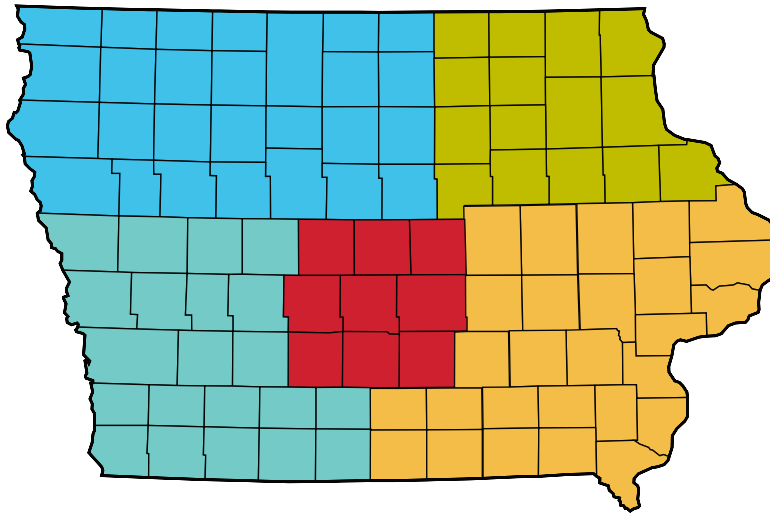
For the tourism industry to be successful and to continue to grow our economic impact, we must also amplify the awareness of Iowa as a destination. Specific milestones and action steps related to this imperative are outlined below:

MILESTONE	ACTION STEPS	TIMING
Create a branding and marketing resource toolkit for the industry.	<ul style="list-style-type: none"> • Create a shared content calendar. • Launch Soul of Iowa 2.0 • Use survey to gather insight into advertising. • Engage Tourism Advisory Council to help create brand toolkit. 	October 2022 – Fall 2023
Utilize new travel areas to encourage collaboration in marketing.	<ul style="list-style-type: none"> • Develop itineraries, stories and personalities for new travel areas and build marketing plan. • Empower all to create marketing partnerships within travel areas. 	October 2022 - Ongoing
Create and share a destination asset inventory.	<ul style="list-style-type: none"> • As part of survey, gather info on existing tourism assets and gaps. • Develop framework to track growth/change, identify trends. 	October 2022 – Fall 2023
Develop a visitor profile	<ul style="list-style-type: none"> • Engage vendor to inform on who visitors are and what they seek from a destination. • Analyze profile to determine gaps and find opportunities for alignment. 	January 2023 – December 2023
Launch data assessment and reporting framework	<ul style="list-style-type: none"> • Create regularly updated dashboard with travel indicators. • Develop tools/reports to address gaps found in existing data. 	July 2023 – December 2023

Work is already underway on the Soul of Iowa 2.0 campaign, which will extend current brand strategy into 2023 and 2024. Additional marketing efforts around Iowa’s new travel areas are also in progress.

IOWA'S TRAVEL AREAS

After receiving feedback from travelers and industry comments during strategic planning, an opportunity to simplify the current travel areas and align them more closely with traveler needs presented itself. Five new travel areas were established for marketing purposes to replace the previous 10 travel areas. Along with the new geographic boundaries, each area has a new icon and name to build the area's personality. The new travel areas will be used for marketing projects, including the Travel Iowa website and Iowa Travel Guide.



NORTHWEST IOWA

Incorporates the area's prominent lakes and boating activities, prairie grasses and natural landscape, music notes depicting rich musical history of the area (Surf Ballroom, Iowa Rock & Roll Museum), all surrounded by a Frank Lloyd Wright-esque window background.



CENTRAL IOWA

Surrounding the state's capital city of Des Moines are incredible rural tourism attractions, like the High Trestle Trail, the Bridges of Madison County and Pella's Dutch architecture and tulips. The Capitol building dome provides a stately backdrop.



NORTHEAST IOWA

The state's unique topography and limestone cliffs are on full display in the Driftless Area. Freshwater springs are fodder for trout fishing and whitewater courses are abundant. The diamond background shape represents the iconic Field of Dreams



SOUTHWEST IOWA

This area features a sea of rolling hills, charming towns and historic landmarks, where visitors can bike, hike and play outdoors. The train engine background shape brings in the area's deep railroad history.



SOUTHEAST IOWA

Iowa's history, creativity and culture come alive in this area. Grant Wood called the area home, the banks of the Mississippi River are home to historic river towns and everything is outlined by an open book.