We will begin in just a few moments.

To avoid any phone charges, please use the Toll-free: 1 877 309 2074 or a headset connected to your computer.



# **Iowa Tourism Office Research Updates**

Webinar -- November 7, 2013

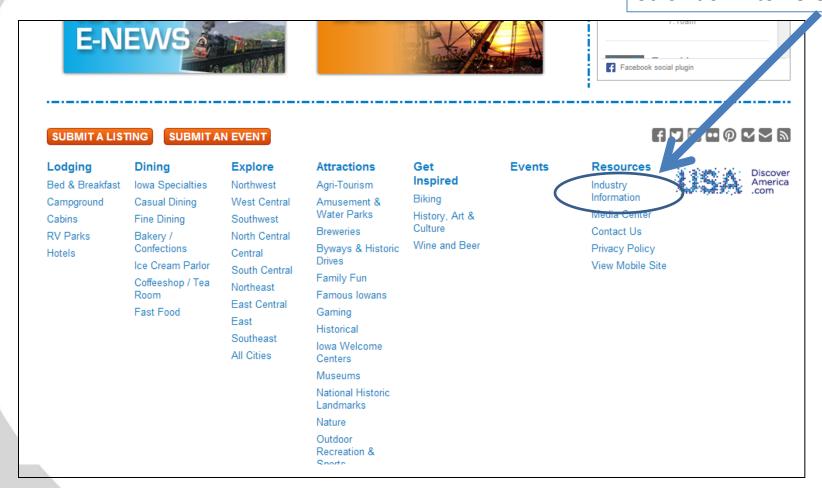
#### traveliowa.com





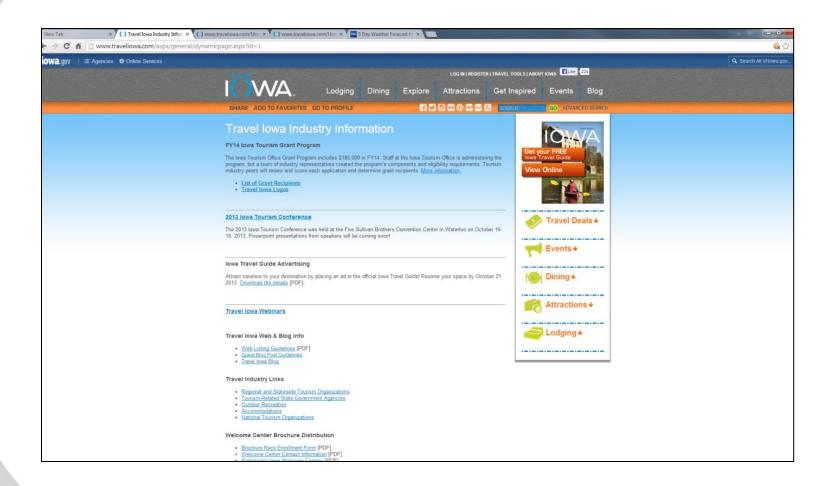
#### **Click on Industry Information**

Scroll down to here!



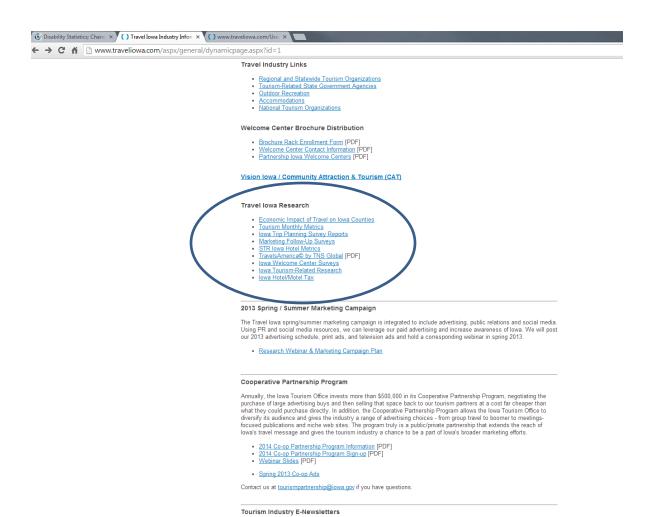


#### **Travel Iowa Industry Information**





#### **Travel Iowa Research**





#### **Travel Iowa Research**

#### Travel Iowa Research

- Economic Impact of Travel on Iowa Counties
- Tourism Monthly Metrics
- <u>Iowa Trip Planning Survey Reports</u>
- Marketing Follow-Up Surveys
- STR Iowa Hotel Metrics
- <u>TravelsAmerica© by TNS Global</u> [PDF]
- lowa Welcome Center Surveys
- · Iowa Tourism-Related Research
- Iowa Hotel/Motel Tax



## **Economic Impact of Travel On Iowa Counties Food Services**





I()WA

# **Economic Impact of Travel On Iowa Counties**Retail





## **Economic Impact of Travel On Iowa Counties Entertainment & Recreation**





# **Economic Impact of Travel On Iowa Counties**Lodging



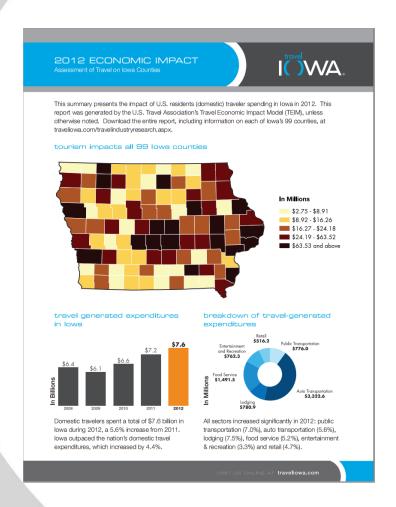


# **Economic Impact of Travel On Iowa Counties Public & Auto Tranporation**



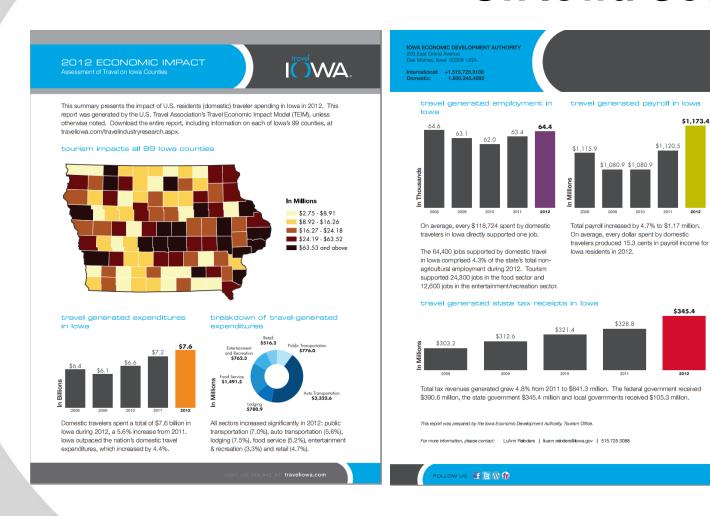


# **Economic Impact of Travel On Iowa Counties**





#### **Economic Impact of Travel On Iowa Counties**

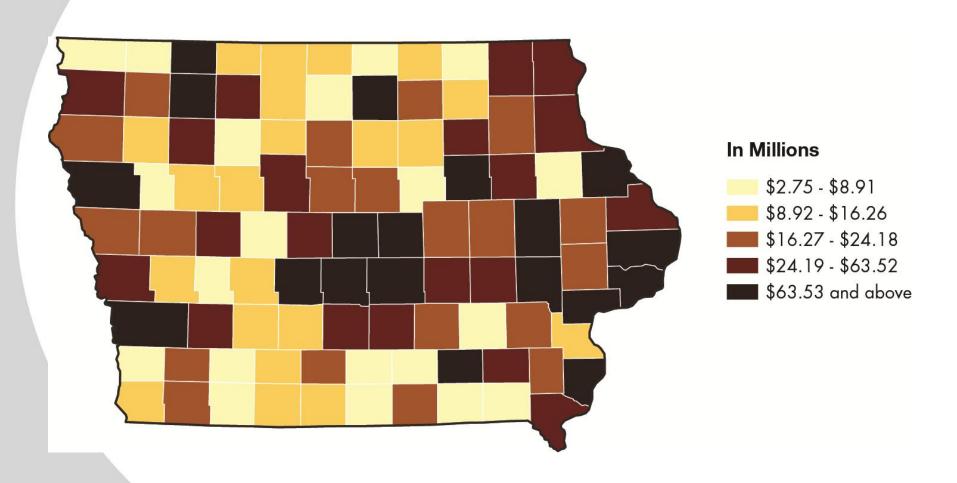




\$1,173.4

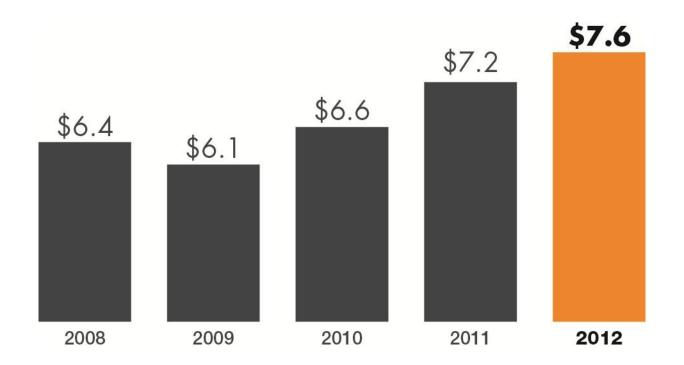
\$345.4

#### **Tourism Impacts all 99 Iowa Counties**



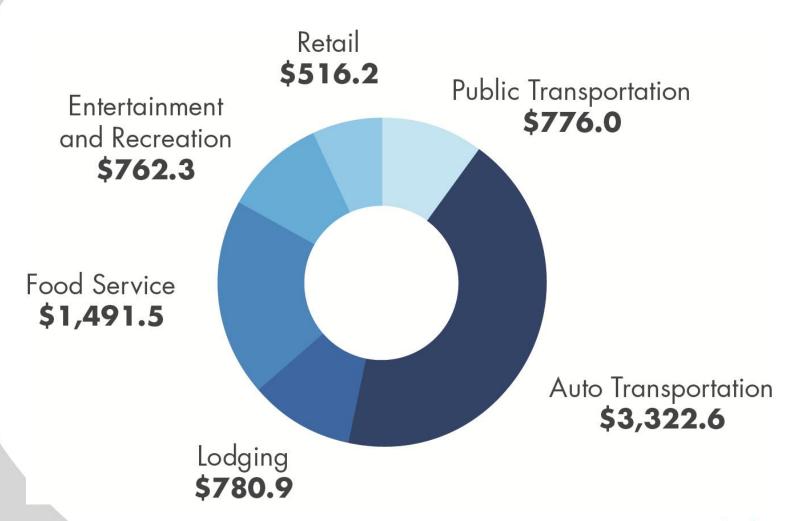


### Travel Generated Expenditures in Iowa



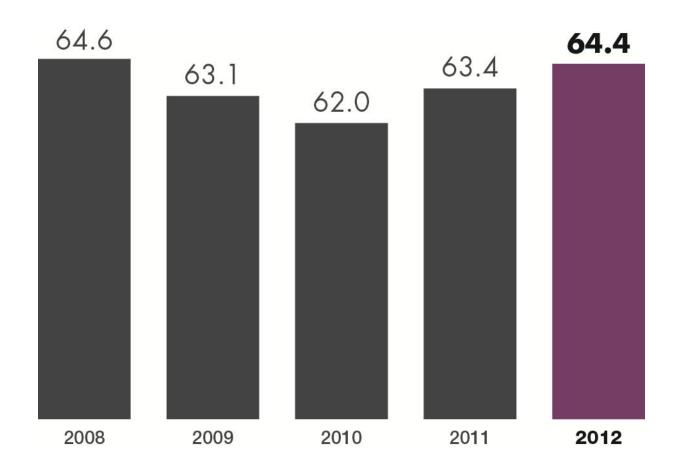


#### Travel Generated Expenditures in Iowa



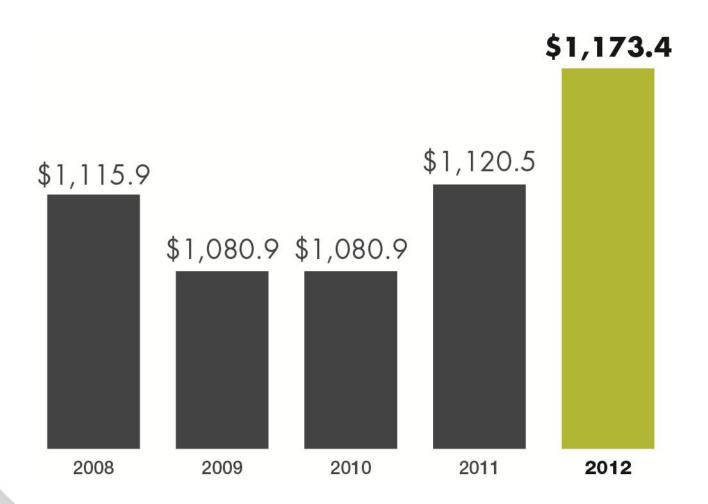


#### Travel Generated Employment in Iowa



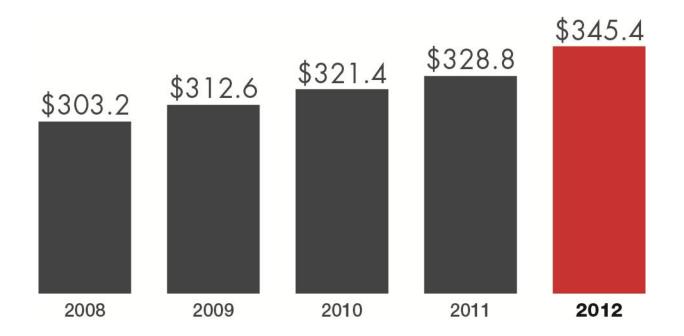


#### **Travel Generated Payroll in Iowa**





#### Travel Generated State Tax Receipts in lowa





# **Economic Impact of Travel On Iowa Counties**

Table A: Alphabetical by County, 2012

LINN LOUISA LUCAS LYON MADISON MAHASKA MARION MARSHALL MILLS MITCHELL MONONA MONROE MONTGOMERY MUSCATINE OBRIEN	\$16.27 59.52 731.20 14.19 7.665 13.60 18.83 48.44 83.29 7.95 10.28 19.54 8.50 20.20	\$1.66 8.57 122.68 1.71 0.83 0.63 1.14 3.54 5.71 11.94 0.88 1.00 3.12	0.10 0.51 6.01 0.10 0.05 0.03 0.06 0.20 0.34 0.67 0.06 0.06 0.06	\$0.85 2.94 29.13 0.93 0.38 0.38 0.72 1.35 2.29 3.86 0.55 0.48	\$0.11 0.81 10.62 0.34 0.08 0.06 0.12 0.27 0.38 1.02 0.07 0.05
LEE LINN LOUISA LUCAS LYON MADISON MAHASKA MARION MARSHALL MILLS MITCHELL MOONOA MOONOA MOONTGOMERY MUSCATINE OTRIEN	731.20 14.19 7.64 6.65 13.60 18.83 48.44 83.29 7.95 10.28	122.68 1.71 0.83 0.63 1.14 3.54 5.71 11.94 0.88 1.00	6.01 0.10 0.05 0.03 0.06 0.20 0.34 0.67 0.06 0.06	29.13 0.93 0.38 0.38 0.72 1.35 2.29 3.86 0.55 0.48	10.63 0.34 0.08 0.06 0.12 0.27 0.38 1.05 0.07 0.05
LOUISA LUCAS LYON MADISON MAHASKA MARION MARSHALL MILLS MITCHELL MONONA MONROE MONTGOMERY MUSCATINE OBRIEN	14.19 7.64 6.65 13.60 18.83 48.44 83.29 7.95 10.28	1.71 0.83 0.63 1.14 3.54 5.71 11.94 0.88 1.00	0.10 0.05 0.03 0.06 0.20 0.34 0.67 0.06 0.06	0.93 0.38 0.38 0.72 1.35 2.29 3.86 0.55 0.48	0.34 0.08 0.06 0.12 0.27 0.38 1.03 0.07 0.05
LUCAS LYON MADISON MAHASKA MARION MARSHALL MILLS MITCHELL MONONA MONROE MONTGOMERY MUSCATINE OBRIEN	7.64 6.65 13.60 18.83 48.44 83.29 7.95 10.28	0.83 0.63 1.14 3.54 5.71 11.94 0.88 1.00 3.12	0.05 0.03 0.06 0.20 0.34 0.67 0.06 0.06	0.38 0.38 0.72 1.35 2.29 3.86 0.55 0.48	0.00 0.00 0.12 0.22 0.38 1.02 0.07 0.09
LYON MADISON MAHASKA MARION MARSHALL MILLS MITCHELL MONONA MONROE MONTGOMERY MUSCATINE OBRIEN	6.65 13.60 18.83 48.44 83.29 7.95 10.28 19.54 8.50	0.63 1.14 3.54 5.71 11.94 0.88 1.00 3.12 1.40	0.03 0.06 0.20 0.34 0.67 0.06 0.06 0.17 0.09	0.38 0.72 1.35 2.29 3.86 0.55 0.48 0.96 0.57	0.00 0.12 0.22 0.38 1.02 0.07 0.09
MADISON MAHASKA MARION MARSHALL MILLS MITCHELL MONONA MONROE MONTGOMERY MUSCATINE OBRIEN	13.60 18.83 48.44 83.29 7.95 10.28 19.54 8.50	1.14 3.54 5.71 11.94 0.88 1.00 3.12 1.40	0.06 0.20 0.34 0.67 0.06 0.06	0.72 1.35 2.29 3.86 0.55 0.48 0.96	0.12 0.27 0.38 1.03 0.07 0.05
MAHASKA MARION  MARSHALL  MILLS  MITCHELL  MONONA  MONROE  MONTGOMERY  MUSCATINE  O'BRIEN	18.83 48.44 83.29 7.95 10.28 19.54 8.50	3.54 5.71 11.94 0.88 1.00 3.12 1.40	0.20 0.34 0.67 0.06 0.06	1.35 2.29 3.86 0.55 0.48 0.96 0.57	0.2° 0.38 1.0° 0.0° 0.09 0.24 0.10
MARION  MARSHALL  MILLS  MITCHELL  MONONA  MONROE  MONTGOMERY  MUSCATINE  O'BRIEN	48.44 83.29 7.95 10.28 19.54 8.50	5.71 11.94 0.88 1.00 3.12 1.40	0.34 0.67 0.06 0.06 0.17 0.09	2.29 3.86 0.55 0.48 0.96 0.57	0.38 1.05 0.07 0.09 0.24 0.10
MARSHALL MILLS MITCHELL MONONA MONROE MONTGOMERY MUSCATINE O'BRIEN	83.29 7.95 10.28 19.54 8.50	11.94 0.88 1.00 3.12 1.40	0.67 0.06 0.06 0.17 0.09	3.86 0.55 0.48 0.96 0.57	1.05 0.07 0.09 0.24 0.10
MILLS MITCHELL MONONA MONROE MONTGOMERY MUSCATINE O'BRIEN	7.95 10.28 19.54 8.50	0.88 1.00 3.12 1.40	0.06 0.06 0.17 0.09	0.55 0.48 0.96 0.57	0.05 0.09 0.24 0.10
MITCHELL  MONONA  MONROE  MONTGOMERY  MUSCATINE  O'BRIEN	10.28 19.54 8.50	3.12 1.40	0.06 0.17 0.09	0.48 0.96 0.57	0.09 0.24 0.10
MONONA MONROE MONTGOMERY MUSCATINE O'BRIEN	19.54 8.50	3.12 1.40	0.17 0.09	0.96 0.57	0.24
MONROE MONTGOMERY MUSCATINE O'BRIEN	8.50	1.40	0.09	0.57	0.10
MONTGOMERY MUSCATINE O'BRIEN					
MUSCATINE O'BRIEN	20.20	3.43	0.22		
O'BRIEN			0.22	1.35	0.21
	75.17	10.90	0.66	3.84	0.87
	21.53	2.60	0.15	1.11	0.15
OSCEOLA	3.52	0.41	0.03	0.19	0.03
PAGE	18.29	1.73	0.10	0.93	0.17
PALO ALTO	34.12	4.93	0.27	1.94	0.64
PLYMOUTH	23.17	2.56	0.14	1.26	0.16
POCAHONTAS	4.51	0.48	0.03	0.24	0.05
POLK	1,744.16	308.94	15.56	71.68	27.34
POTTAWATTAMIE	298.65	52.78	3.16	15.90	4.42
POWESHIEK	45.45	5.45	0.30	2.39	0.85
RINGGOLD	10.19	0.92	0.04	0.57	0.19
SAC	15.36	1.41	0.07	0.79	0.29

The Economic Impact of Travel on Iowa Counties

A Study Prepared for the Iowa Economic Development Authority Iowa Tourism Office By the

Research Department of the U.S. Travel Association Washington, D.C. August 2013





#### **Economic Impact Resources**



## Recreation Research and Service Program University of Northern Iowa

Dr. Samuel Lankford
Sustainable Tourism and Environment Program
School of HPELS
University of Northern Iowa
203 Wellness/ Recreation Center
Cedar Falls, Iowa 50614
sam.lankford@uni.edu
319- 273-6840



#### Festival/Event Economic Impact Model lowa Destination Marketing Alliance

Josh Schamberger
Iowa City Coralville Area, CVB
900 1st Avenue
Coralville, IA 52241
joshua@iowacitycoralville.org
319-337-6592





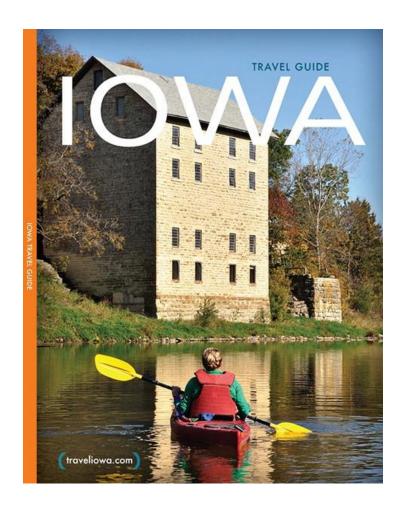


- Web Site Analytics
  - Over 444,000 visitors this year





- Travel Guide Requests
  - Over 100,000 this year
  - Over 20,000 through web site

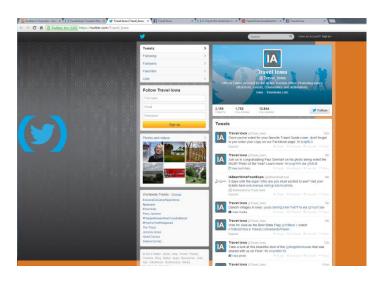




#### Social Media Metrics

- facebook over 23,000 'likers'
- twitter nearly 13,000 followers







- Welcome Center Visitation
  - Over 460,000 individuals





- Atttractions Visitation
- Rest Area Visitation
- Airport Deplanements
- Leisure & Hospitality Employment
- Gasoline Prices
- Weather





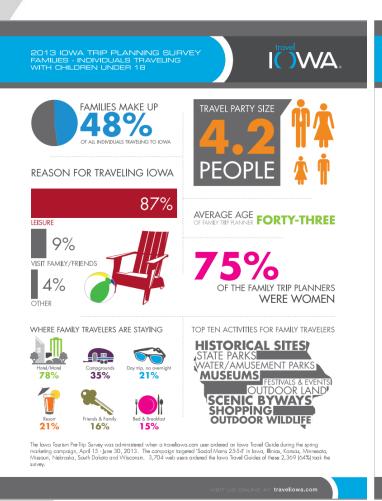
Iowa Tourism Office Staff Photo

**Trip Planning Survey** 













## **Families**

Traveling with children under 18

### **Adults**

Traveling without children under 18







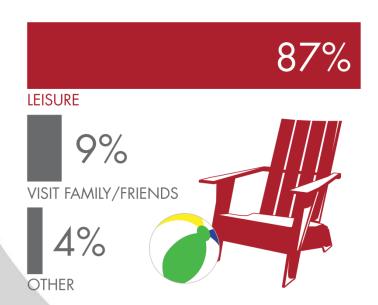
## **Families**

Traveling with children under 18

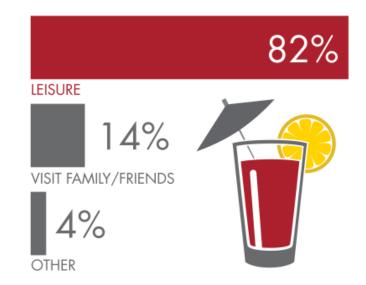
### **Adults**

Traveling without children under 18

#### REASON FOR TRAVELING IOWA



#### REASON FOR TRAVELING IOWA





### **Families**

Traveling with children under 18

## **Adults**

Traveling without children under 18

TOP TEN ACTIVITIES FOR FAMILY TRAVELERS



TOP TEN ACTIVITIES FOR ADULT TRAVELERS







Traveling with children under 18



Traveling without children under 18





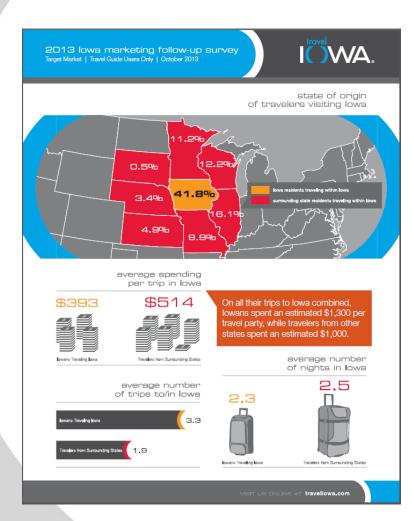


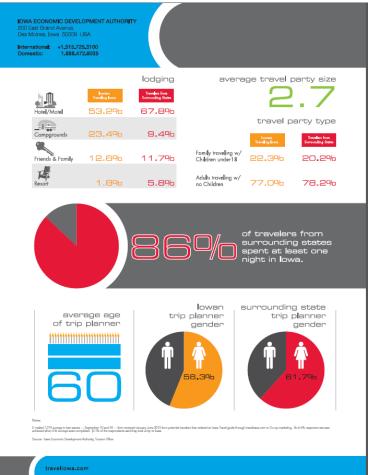
### **Marketing Follow-up Survey**



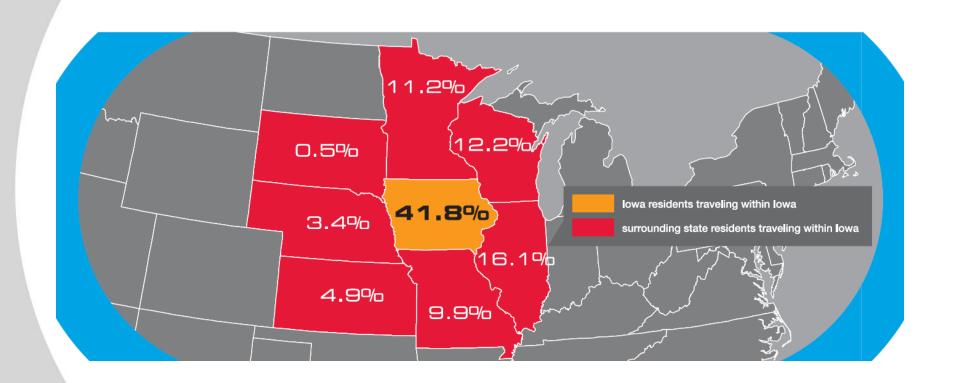


#### Marketing Follow-up Survey











average spending per trip in lowa

\$393



lowans Traveling Iowa

\$514



Travelers from Surrounding States



average number of trips to/in lowa

Iowans Traveling Iowa

Travelers from Surrounding States 1 . S



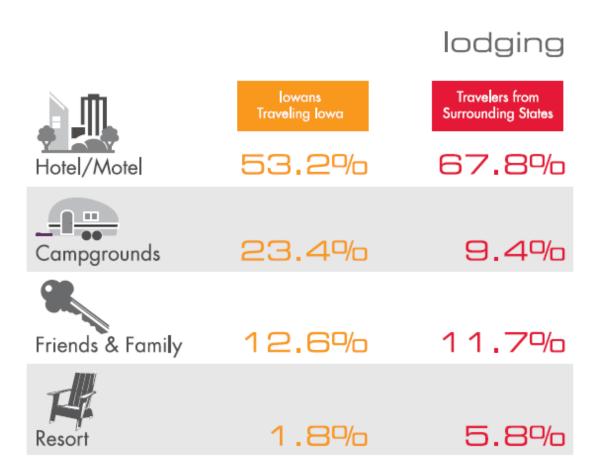
average number of nights in lowa





Travelers from Surrounding States

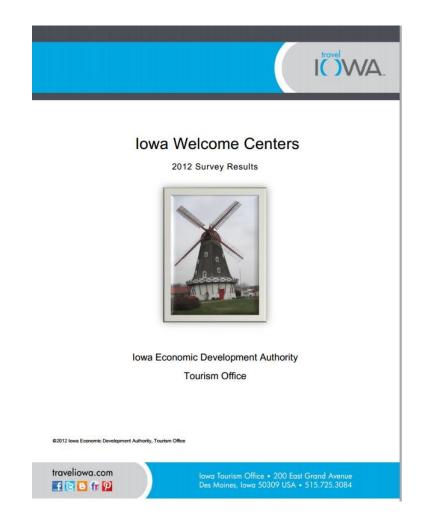


















### Basic Demographics

- Length of Stay
- Origin, Destination
- Party Size, Type, Age
- Interest Areas
- Spending
- Lodging



- Interest Areas Basic Demographics
  - Historical Attractions
  - Scenic Byways
  - National & State Parks
  - Outdoor Recreation
  - Museums
  - Wineries -- Breweries
  - Shopping
  - Agricultural Attractions
  - Festivals & Events
  - Casinos
  - Antiquing
  - Culinary











		lov	va's To	p Ten	Count	y Hote	I۷	lar	kets			
				Sour	ce: 2013 ST	R, Inc.						
					Curre	nt Month						
	Oc	с %	ADR		RevPAR		Percent Change from 2012					
	2013	2012	2013	2012	2013	2012	Осс	ADR	RevPAR		Room Avail	Room Sold
Jan	43.6	42.7	80.22	78.50	34.96	33.51	2.1	2.2	4.3	6.5	2.1	4.2
Feb	53.2	53.7	82.97	80.45	44.13	43.22	-1.0	3.1	2.1	3.7	1.5	0.5
Mar	56.2	55.6	81.84	78.32	45.96	43.53	1.0	4.5	5.6	7.2	1.5	2.6
Apr	60.1	57.4	84.21	79.87	50.58	45.86	4.6	5.4	10.3	11.7	1.2	5.9
May	62.2	62.5	85.24	81.42	53.05	50.92	-0.5	4.7	4.2	6.4	2.2	1.7
June	73.3	74.4	90.92	87.43	66.66	65.02	-1.4	4.0	2.5	4.9	2.3	0.9
July	68.2	68.3	85.11	81.46	58.06	55.66	-0.2	4.5	4.3	6.3	2.0	1.8
Aug	71.1	71.7	87.37	85.39	62.12	61.21	-0.8	2.3	1.5	3.6	2.1	1.3
Sept	63.0	64.3	85.23	83.72	53.72	53.86	-2.0	1.8	-0.3	1.6	1.9	-0.2
Oct												
Nov												
Dec												
						e 2013 vs	2012					
	Oc	Occ %		ADR		RevPAR		Percent Change from YTD 2012				
	2013	2012	2013	2012	2013	2012	Осс	ADR	RevPAR	Room	Avail	Sold
Jan	43.6	42.7	80.22	78.50	34.96	33.51	2.1	2.2	4.3	6.5	2.1	4.2
Feb	48.1	47.9	81.68	79.58	39.28	38.11	0.4	2.6	3.1	4.9	1.8	2.2
Mar	50.9	50.5	81.75	79.10	41.58	39.98	0.6	3.3	4.0	5.8	1.7	2.3
Apr	53.1	52.3	82.47	79.31	43.83	41.46	1.7	4.0	5.7	7.4	1.6	3.3
May	55.0	54.4	83.17	79.82	45.74	43.41	1.1	4.2	5.4	7.2	1.7	2.8
June	58.0	57.7	84.83	81.45	49.23	47.00	0.6	4.2	4.7	6.6	1.8	2.4
July	59.5	59.3	84.89	81.45	50.53	48.27	0.4	4.2	4.7	6.6	1.8	2.3
Aug	60.9	60.9	85.26	82.04	51.97	49.93	0.1	3.9	4.1	6.0	1.9	2.0
Sept	61.1	61.2	85.27	82.24	52.13	50.37	-0.2	3.7	3.5	5.4	1.9	1.7
Oct												
Nov.												
Dec												





		Par	ticipation		Includes:			
	Properties		Rooms		Polk County, IA	Johnson County, IA		
	Census	Sample	Census	Sample	Scott County, IA	Dubuque County, IA		
Jan	333	264	30405	25196	Linn County, IA	Story County, IA		
Feb	334	267	30500	25416	Pottawattamie County, IA	Woodbury County, IA		
Mar	334	266	30501	25355	Black Hawk County, IA	Dallas County, IA		
Apr	334	265	30501	25186				
May	335	263	30768	24960				
June	336	266	30813	25389				
July	336	265	30811	25237				
Aug	336	262	30855	25093				
Sept	334	262	30766	25208				
Oct								
Nov.								
Dec								









### STR

Karrie Keen

Director, Destination and Trend Operations

615-824-8664 x3331

karrie@str.com

www.str.com



## **Iowa Hotel/Motel Tax**





## **Iowa Tourism-Related Research**





# **Go Digital**



Amy Zeigler
Digital Media
Amy.Zeigler@iowa.gov
515-725-3086

Web site: traveliowa.com e-mail: tourism@iowa.gov

Brooke Miller Social Media Brooke.Miller@iowa.gov 515-725-3080

facebook: Travel Iowa twitter: Travel\_Iowa Pinterest: Travel Iowa Blog: blog.traveliowa.com



### Contacts:











#### Shawna Lode, Manager

Shawna.Lode@iowa.gov

515-725-3090

#### Lonie Mezera, Programs

Lonie.Mezera@iowa.gov

515-725-3087

### **Colleen Murphy, Partnerships**

Colleen.Murphy@iowa.gov

515-725-3089

#### Jessica O'Riley, Public Relations & Vision Iowa

Jessica.Oriley@iowa.gov

515-725-3085

### **Evelyn Davis, Clerk Specialist**

Evelyn.Davis@iowa.gov

515-725-3084



## Get on the research e-mail list.



LuAnn Reinders Research & Welcome Center Manager

Iowa Economic Development Authority, Tourism Office

200 East Grand
Des Moines, IA 50309
<a href="mailto:luann.reinders@iowa.gov">luann.reinders@iowa.gov</a>
515.725.3088

