

# IOWA GROUP TRAVEL MARKET ANALYSIS

Prepared for: Iowa Tourism Industry Partners & Iowa Tourism Office

July 2025





# ABOUT WHEREABOUT



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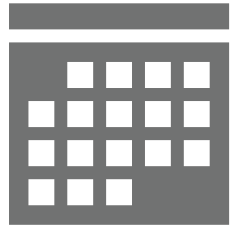
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# PURPOSE OF STUDY

Iowa Travel Industry Partners (iTIP), in collaboration with the Iowa Tourism Office, commissioned this analysis to evaluate Iowa's competitiveness and potential in the group travel sector. With group travel regaining momentum post-pandemic, Iowa wants to position itself as a more appealing and accessible destination for group travel, and to better understand untapped markets.



# METHODOLOGY



7

Months:  
Dec. 2024—  
Jun. 2025



11

Interviews  
of group  
travel  
operators



10

Interviews  
of group  
travel  
suppliers



7+

Online  
resources



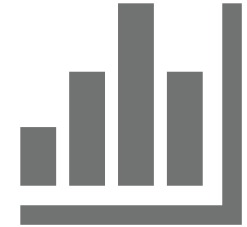
40

Operator  
survey  
respondents



41

Supplier  
survey  
respondents

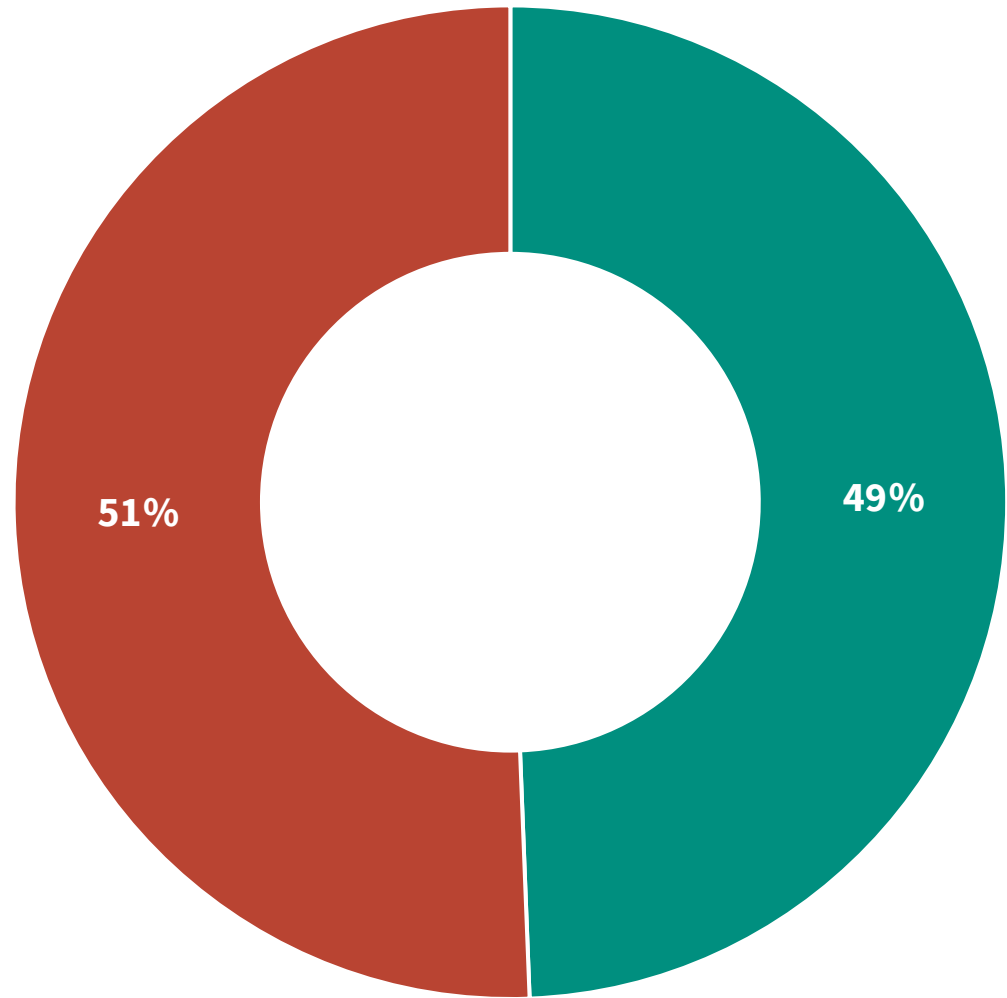


6

Competitor  
states  
assessed

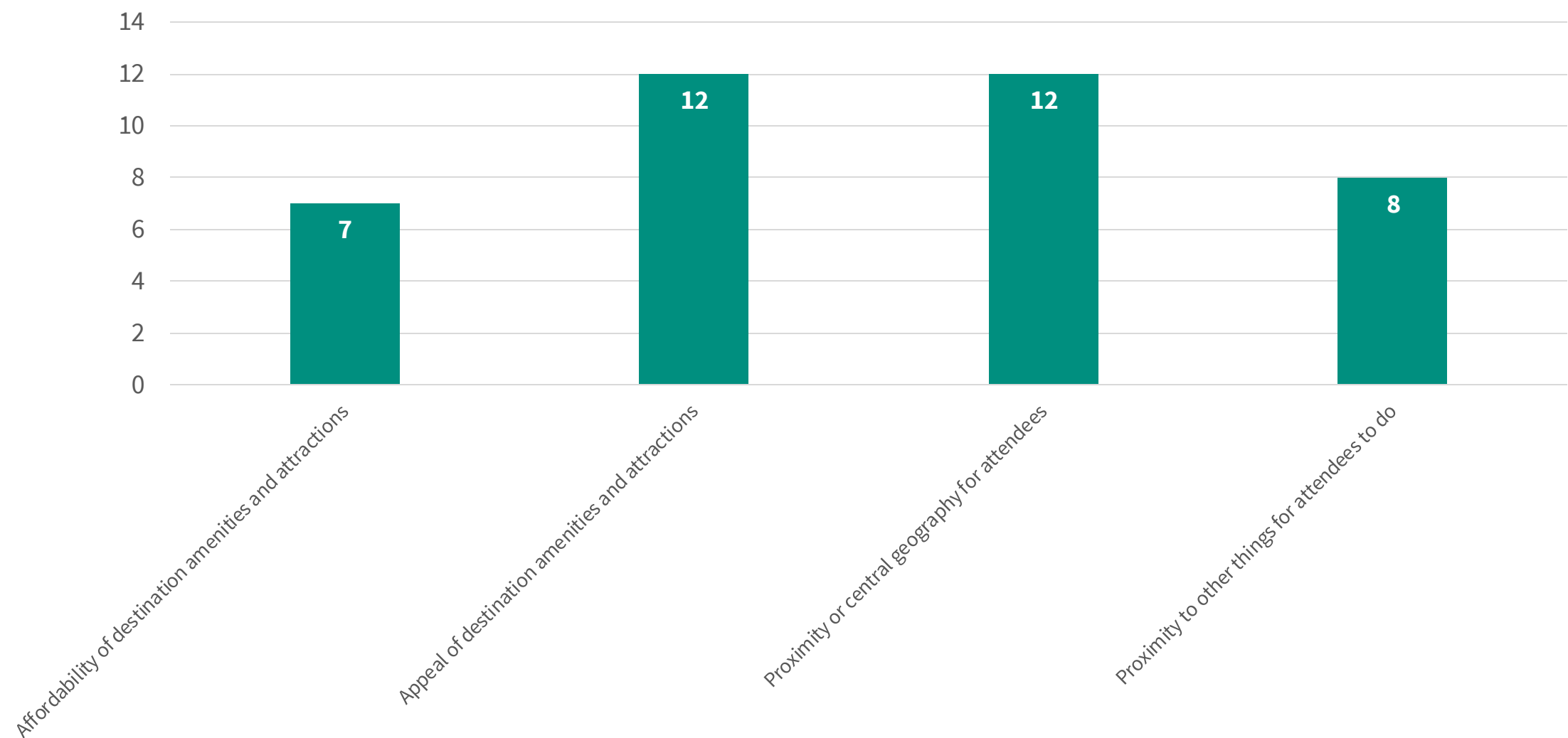


# RESPONDENT SPLIT



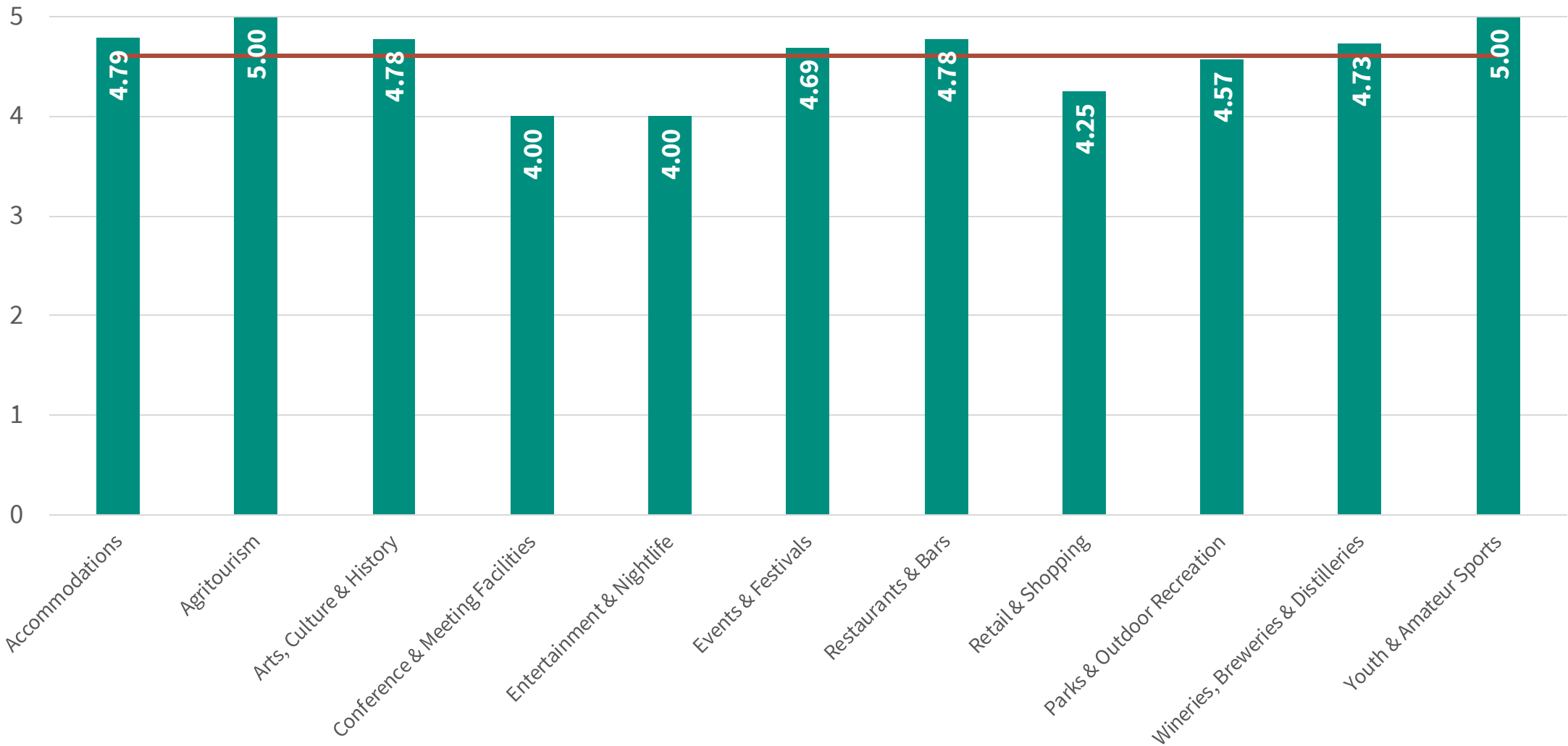
- I am a group tour operator or somebody who plans group coach tours that pass through Iowa, or whose end destination is Iowa
- I am part of the Iowa tourism industry, and my organization seeks to attract group coach tours to our part of Iowa

# TOUR OPERATORS: TOP REASONS YOU BOOK GROUP TOURS IN IOWA

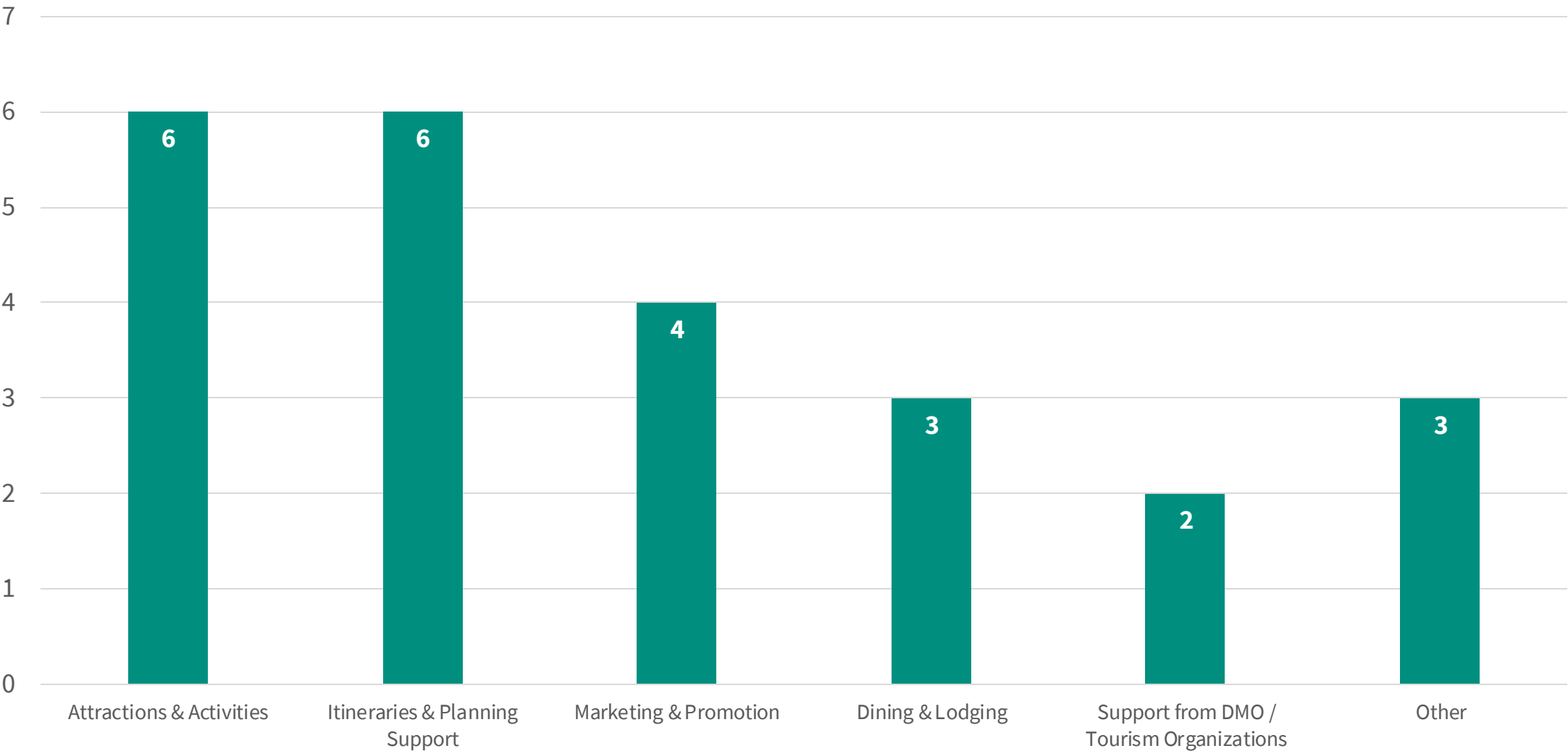




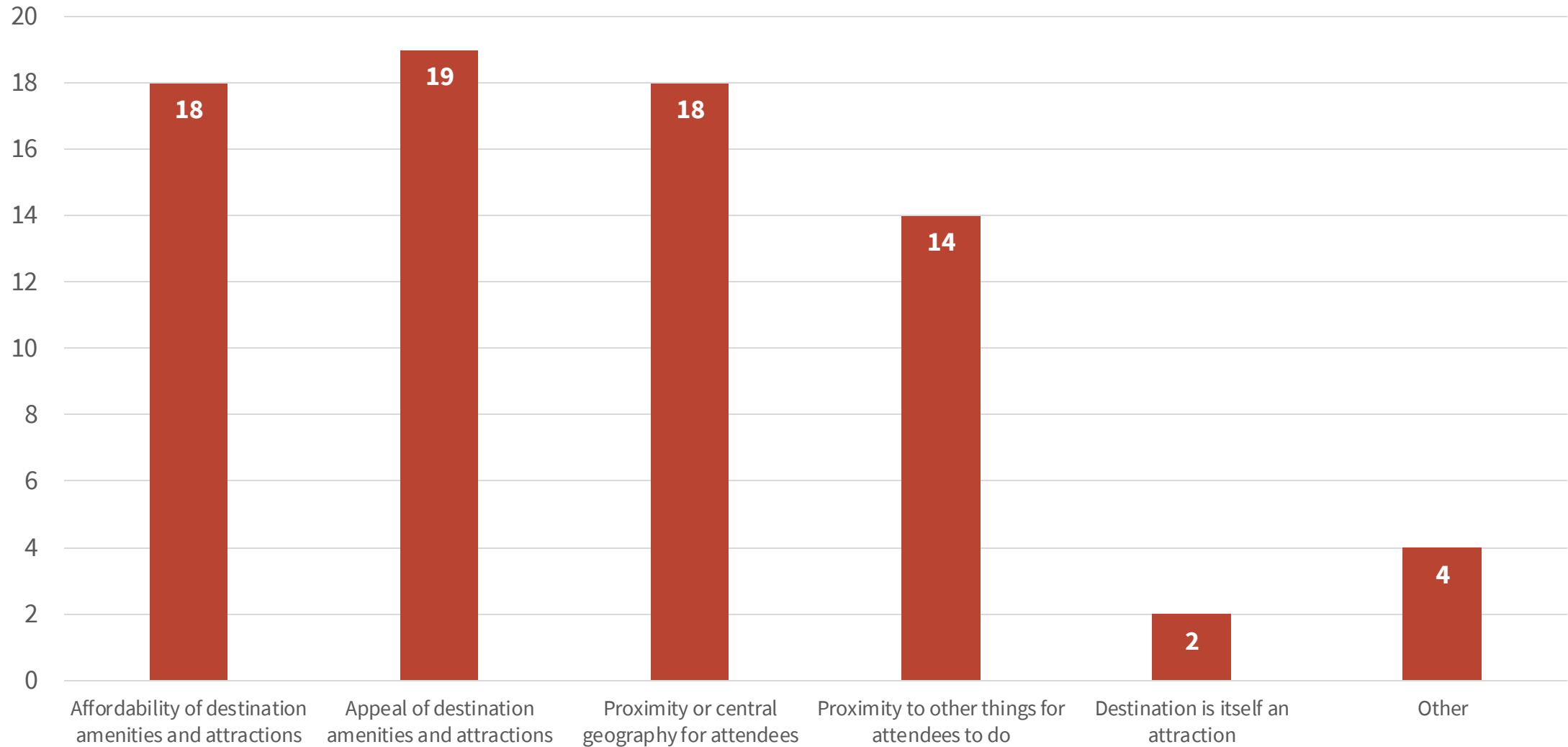
# TOUR OPERATORS: QUALITY OF VISITOR EXPERIENCE



# TOUR OPERATORS: WHAT IMPROVEMENTS COULD BE MADE



# SUPPLIERS: TOP REASONS TOURS ARE BOOKED IN IOWA

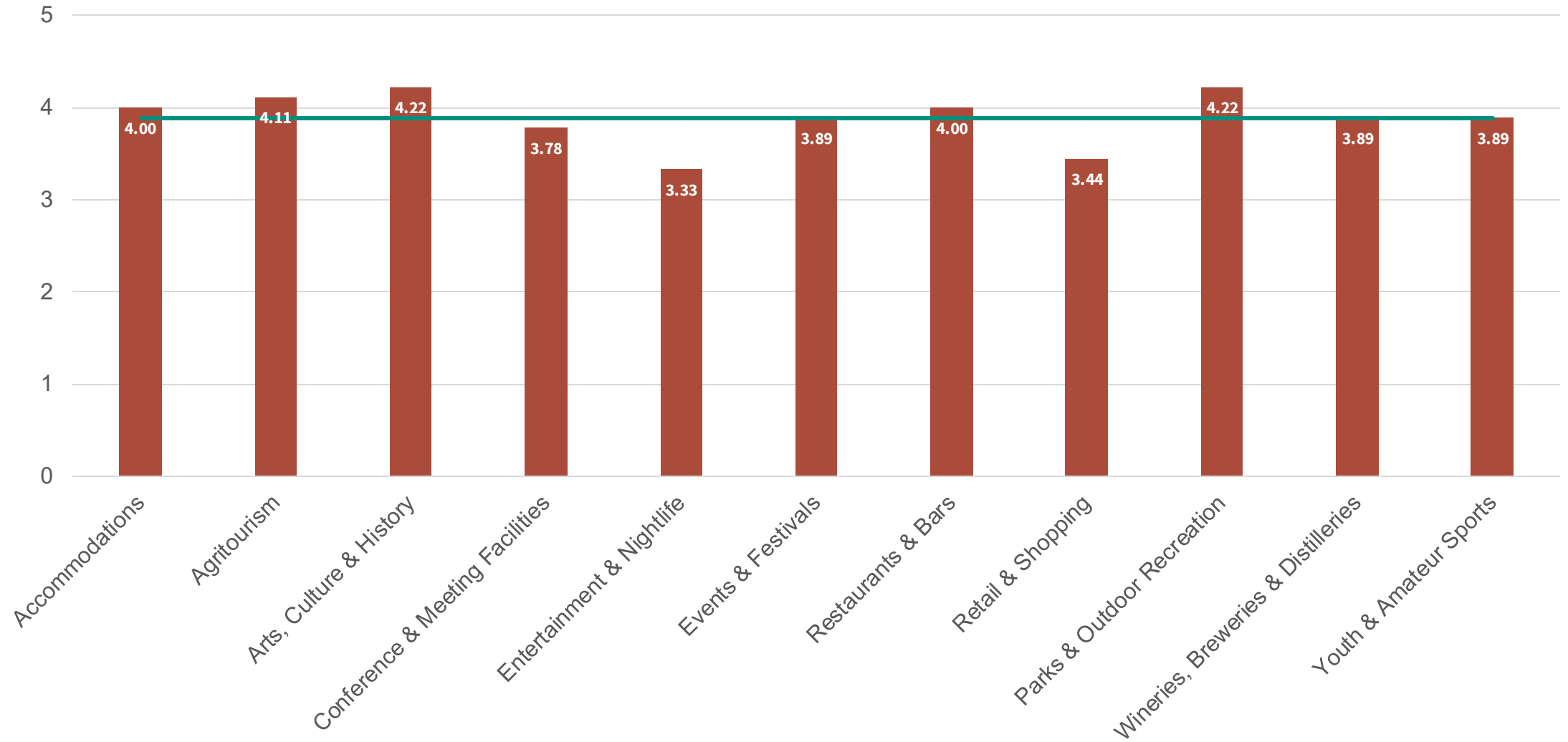


# SUPPLIERS: WHAT IMPROVEMENTS COULD BE MADE

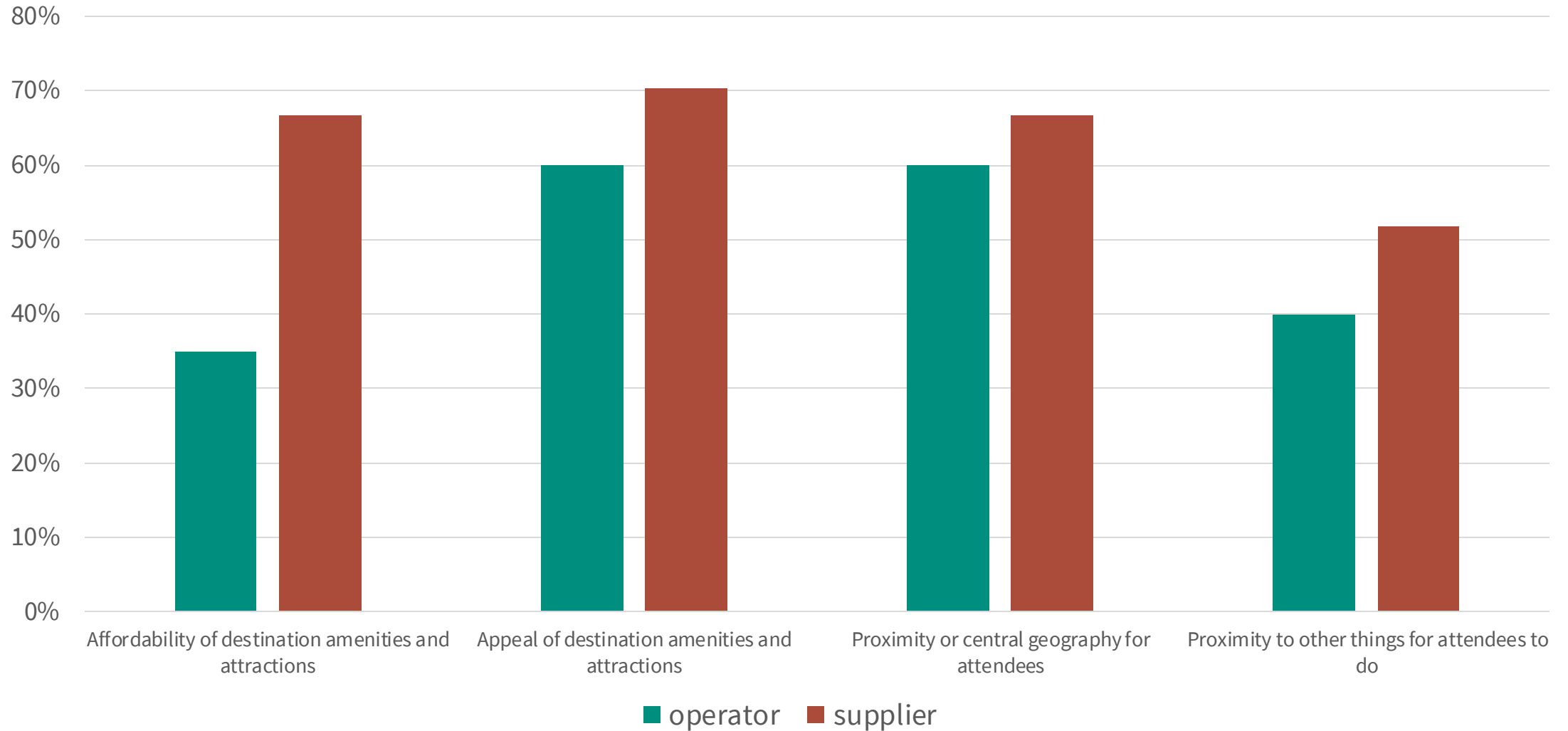




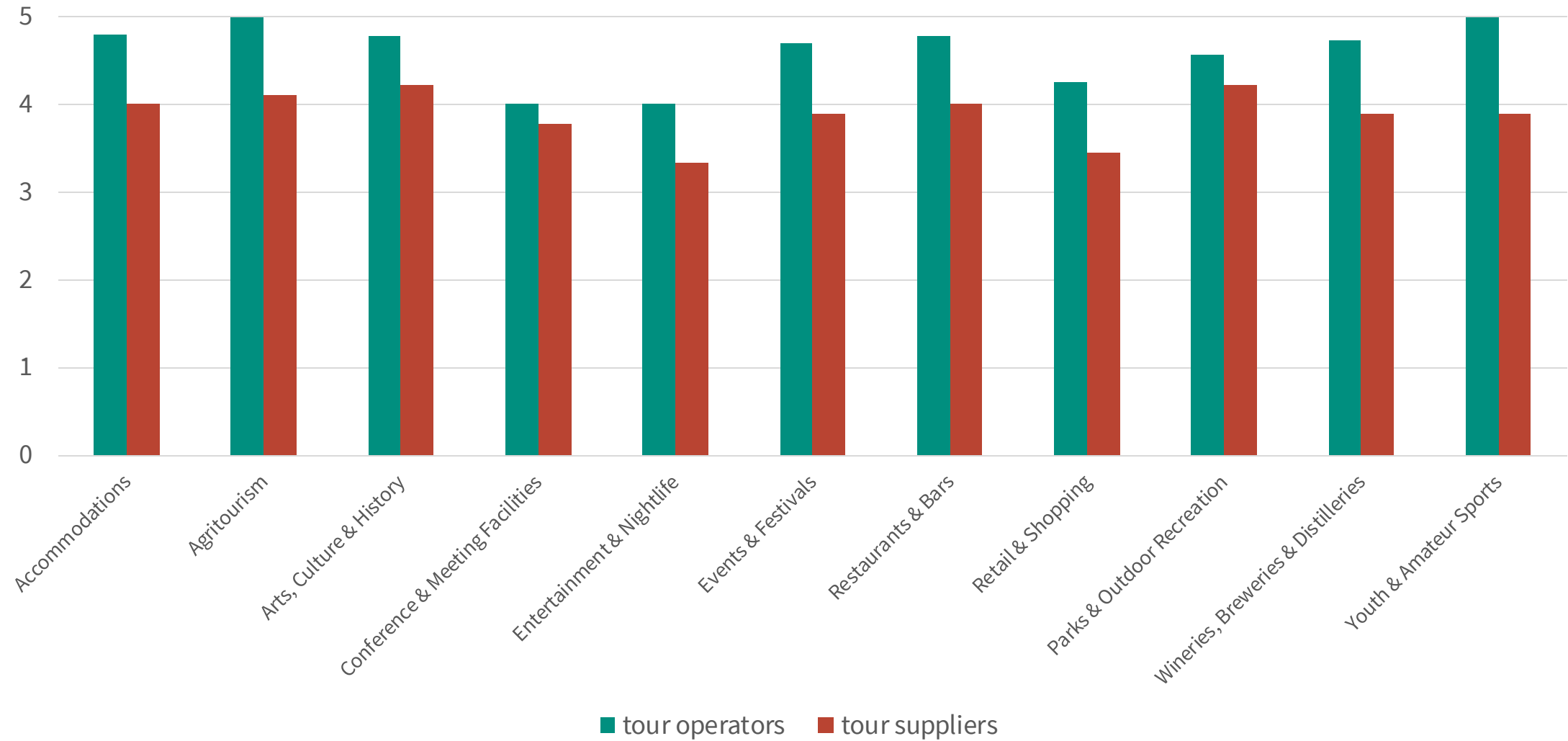
# SUPPLIERS: QUALITY OF VISITOR EXPERIENCE



# OPERATORS AND SUPPLIERS: BOOKING REASONS



# OPERATORS AND SUPPLIERS: QUALITY OF VISITOR EXPERIENCE

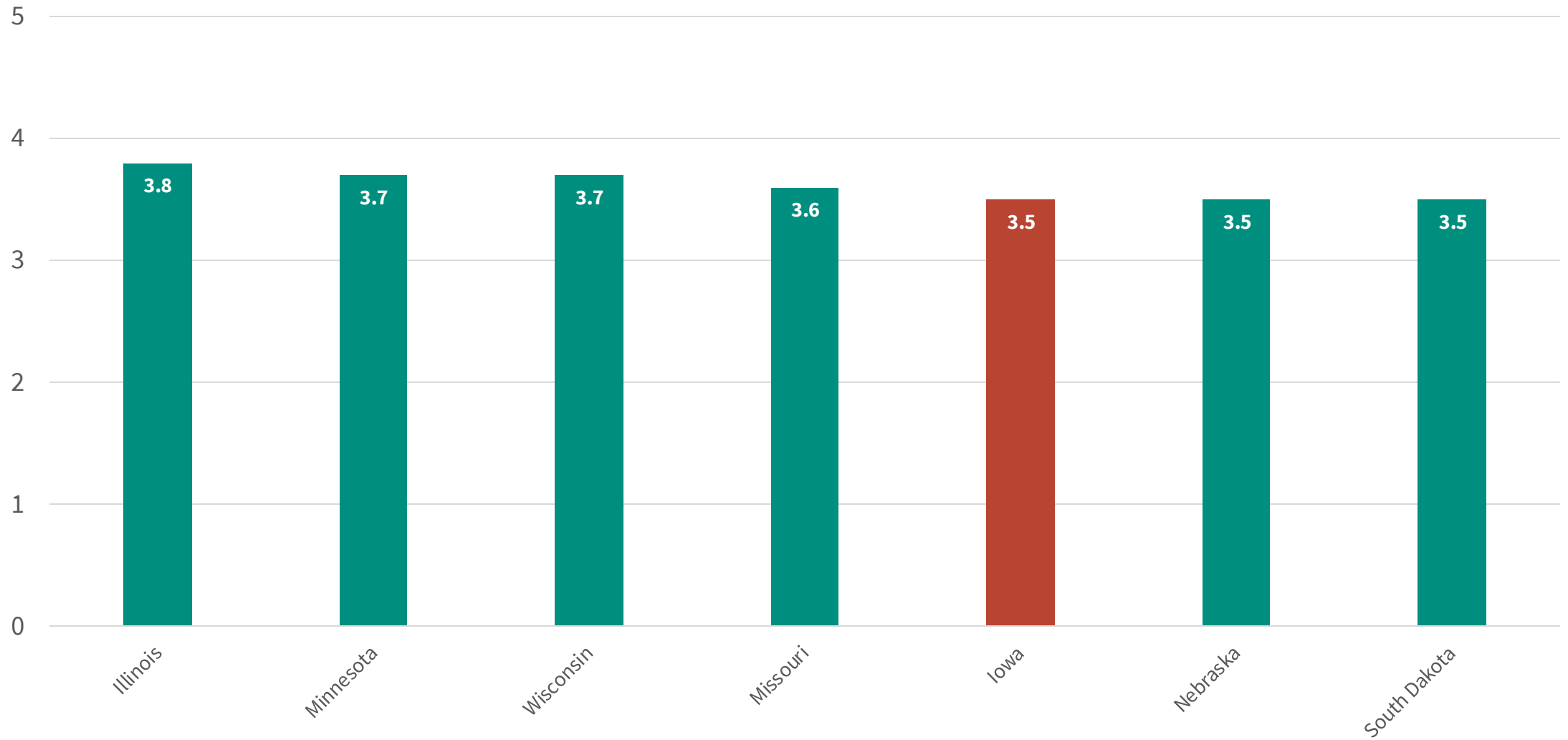


# ASCE INFRASTRUCTURE REPORT CARD

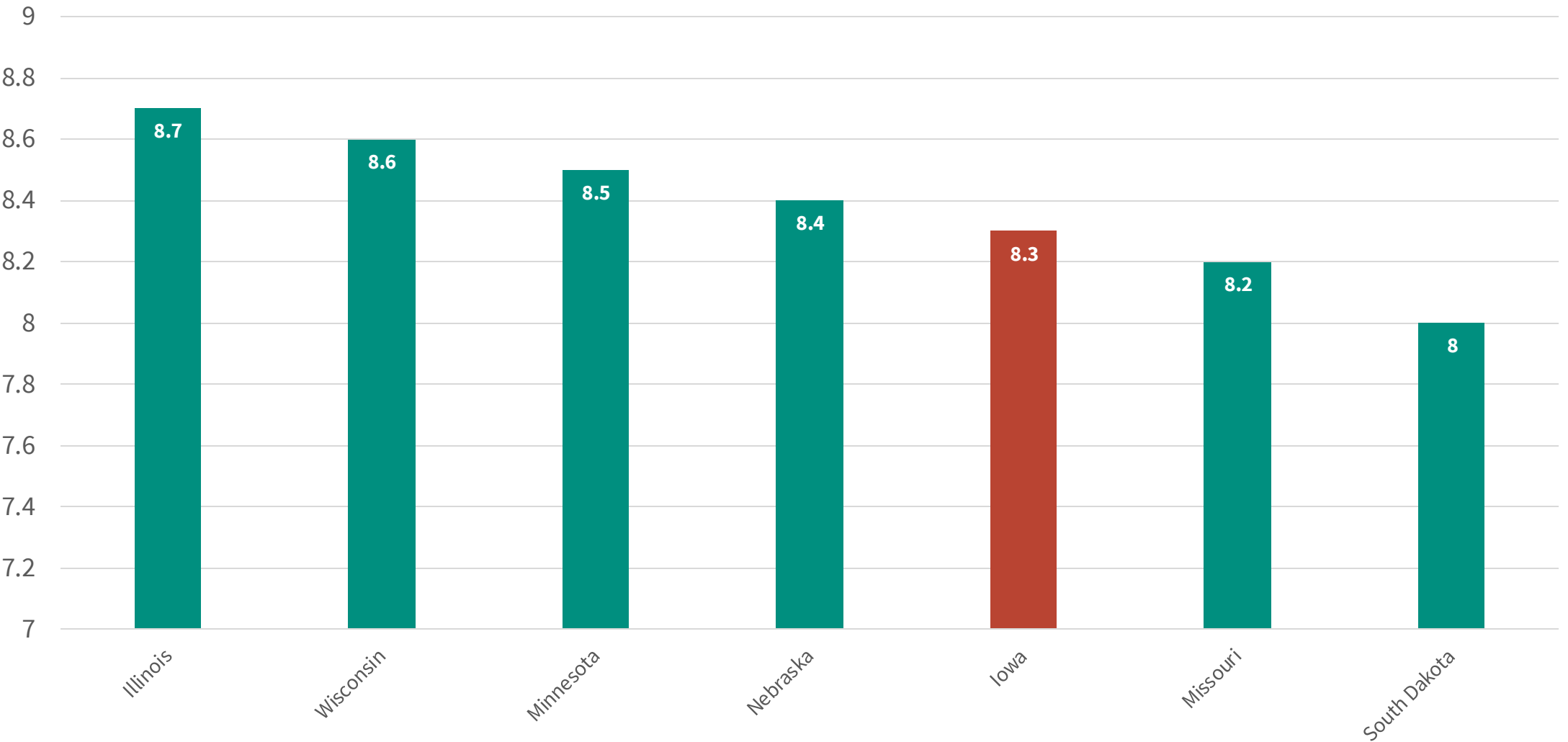
State	Aviation	Roads
Iowa	C-	B-
Illinois	C+	D+
Minnesota	B	D+
Missouri	C	D+
Wisconsin	C+	C



# RESTAURANT RANKINGS AMONGST COMP. SET



# ACCOMMODATIONS RANKINGS AMONGST COMP. SET





# DESTINATION DEVELOPMENT RECOMMENDATIONS

1. Elevate destinations to meet group travel experience needs
2. Meet and exceed the specific needs of the most common type of group traveler
3. Cultivate more dynamic and unique experiences
4. Consider itineraries that will attract the next generation





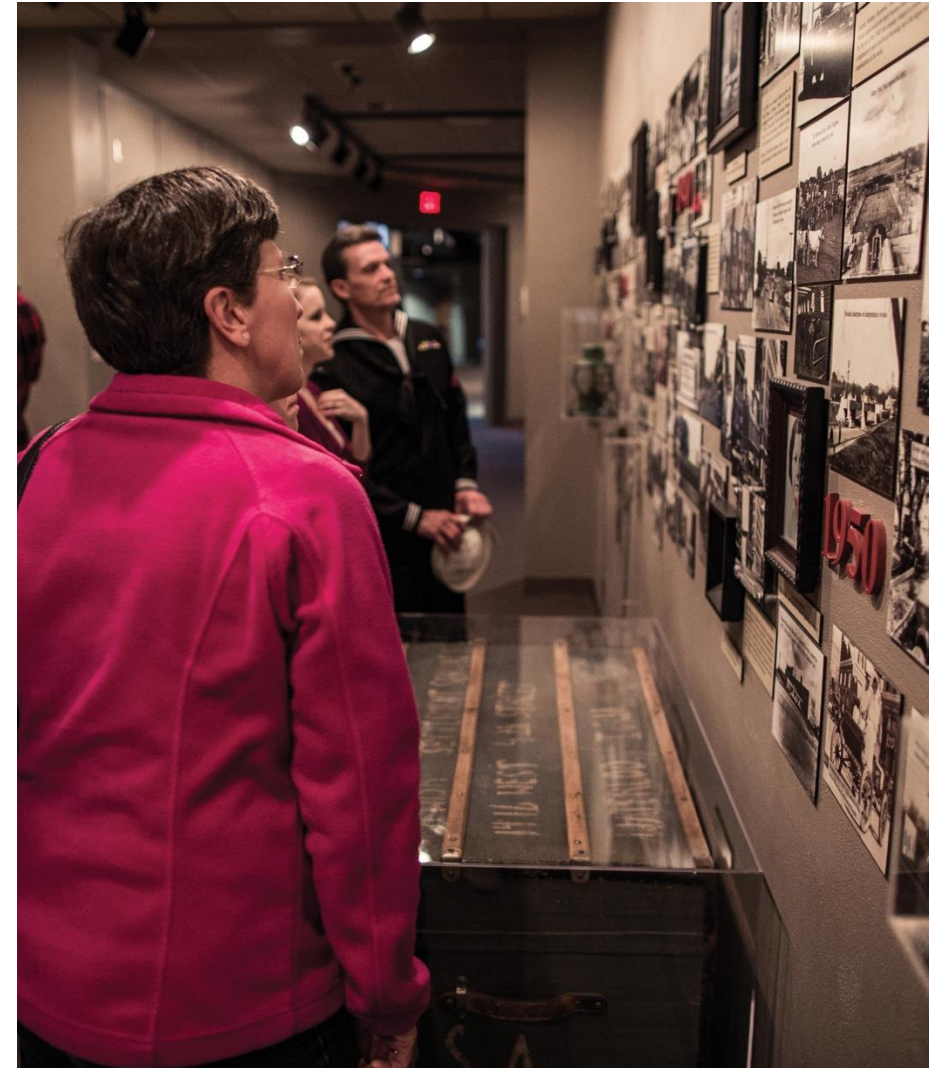
# MARKETING & MESSAGING RECOMMENDATIONS

1. Tell a new and compelling story of Iowa
2. Speak to emerging audiences
3. Develop a trade show strategy



# COLLABORATION & RELATIONSHIPS RECOMMENDATIONS

1. Invest in relationships
2. Help the tour operator make their clients feel special
3. Work together for all of Iowa





# ADVOCACY & EDUCATION RECOMMENDATIONS

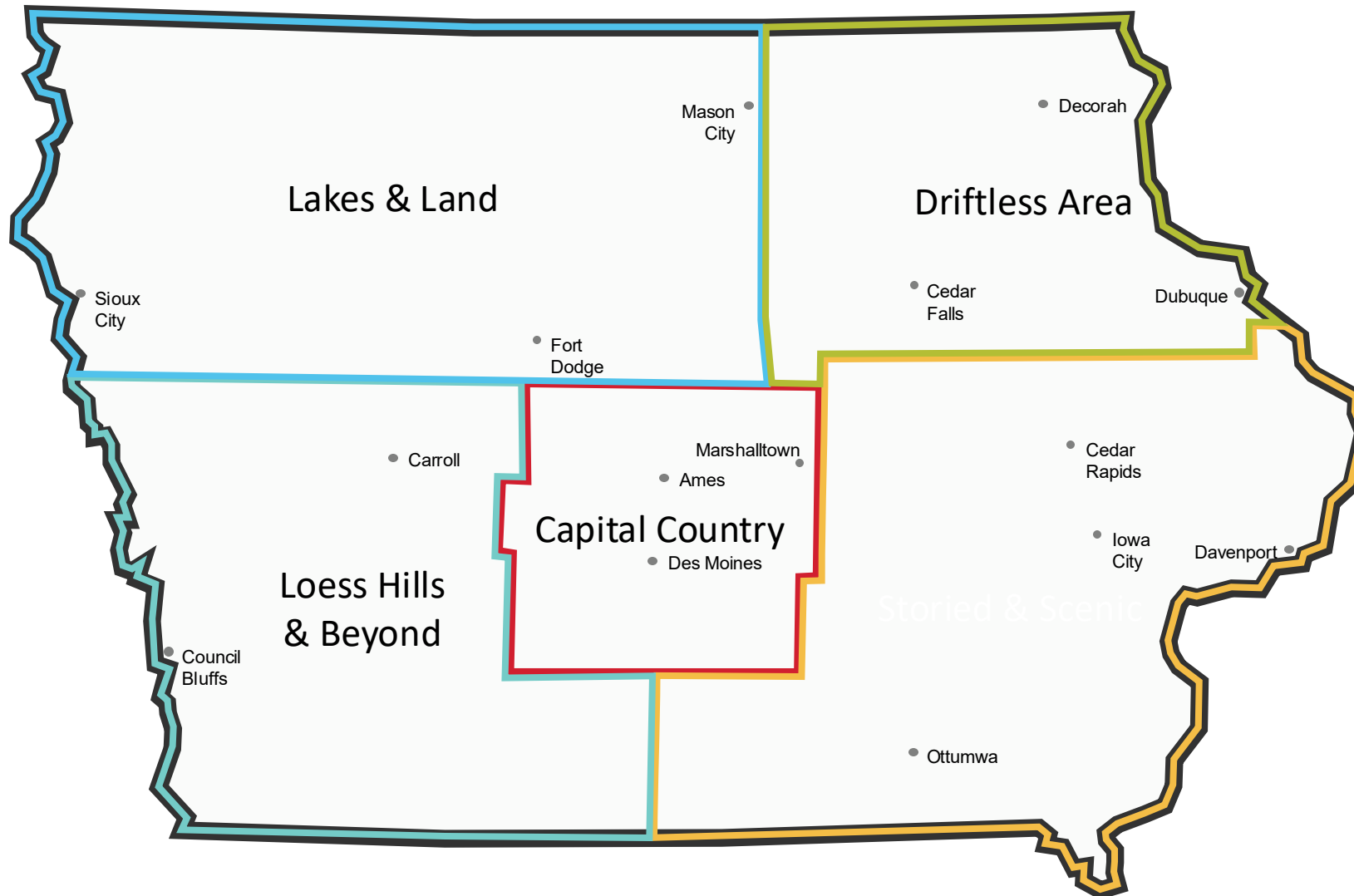
1. Provide education on the value of tourism and of group travel in particular
2. Advocate for incentives that make Iowa more competitive
3. Support advocacy on behalf of the motorcoach trade







# MAP OF IOWA'S FIVE TOURISM AREAS



# CAPITAL COUNTRY OPPORTUNITIES

- Elevate Capital Country to meet group travel experience needs, with a focus on agritourism
- Meet and exceed the specific needs of the most common types of group travelers for Capital Country: seniors, special interest groups, and social groups
- Speak to emerging audiences in Capital Country, especially religious groups and students



# DRIFTLESS AREA OPPORTUNITIES

- Meet and exceed the specific needs of the most common type of group travelers in the Driftless Area, especially seniors and social groups
- Cultivate more dynamic and unique experiences, especially adventure/activity
- Speak to emerging audiences in the Driftless Area, especially adventure/activity and religious groups



# LAKEs & LAND OPPORTUNITIES

- Cultivate more dynamic and unique experiences in the Lakes & Land Area, especially playing to the relative strength in dining and arts/culture/history
- Consider Lakes & Land itineraries that will attract the next generation, playing to relative strength in entertainment and nightlife
- Speak to emerging audiences, especially religious groups



# LOESS HILLS & BEYOND OPPORTUNITIES

- Cultivate more dynamic and unique experiences, especially playing to the Loess Hills & Beyond Area's relative strength in beverage and arts/culture/history
- Elevate destinations to meet group travel experience needs, and play to strength in accommodations
- Speak to emerging audiences, especially students



# STORIED & SCENIC OPPORTUNITIES

- Cultivate more dynamic and unique experiences, especially playing to strength in events & festivals
- Meet and exceed the specific needs of the most common type of group travelers in Storied & Scenic: seniors, social groups, and special interest groups
- Speak to emerging audiences, especially adventure/activity and religious groups



