JULY, 2025

MEETINGS & CONVENTIONS MARKET ANALYSIS

PREPARED FOR IOWA TRAVEL INDUSTRY PARTNERS AND IOWA TOURISM OFFICE

WHEREABOUT

ACROSS IOWA, MEETINGS AND CONVENTIONS BRING PEOPLE TOGETHER—for business, for connection, and for shared purpose. They generate economic activity for our communities, drive demand for local services, and introduce new visitors to all corners of our state. In recent years, Iowa's reputation as a friendly, affordable, and accessible destination has made it an increasingly appealing option for planners seeking a welcoming, well-supported experience.

Yet, we know there is more to do. While we already attract many meetings & conventions, there are opportunities to bring even more to the state. Doing so will require the state to develop the kind of destinations where people want to gather—places with vibrant districts, modern infrastructure, reliable air and ground access, and memorable experiences beyond the meeting room. It's also about telling a more compelling story about Iowa and working across regions to support one another in bringing meetings here.

That is why the Iowa Travel Industry Partners, in collaboration with the Iowa Tourism Office , embarked on this Meetings & Conventions Market Analysis. We wanted to understand what's working, what's not, and what we can do collectively to attract and retain more events throughout Iowa. The result is a strategic path forward that brings together the voices of planners, suppliers, and community leaders.

This analysis reflects a shared vision: an Iowa that is ready to meet the needs of today's meetings industry. It identifies where we can invest in infrastructure, where we can elevate our messaging, and how we can grow collaboration across tourism areas. It also reminds us that while Iowa's hospitality is our hallmark, continued success depends on being intentional, informed, and inclusive in how we welcome others.

I want to thank all who participated in this process—from those who shared their insights through interviews and surveys to the many local leaders and partners who help make Iowa a place worth gathering. I encourage everyone in our industry to reflect on this analysis, consider how it may apply to your organization, and join us in taking steps to build a future where meetings and conventions are a growing, thriving part of Iowa's visitor economy.

Together, we can ensure that Iowa remains not only a great place to live and visit—but also a great place to meet.

Yours in Tourism,

Chelsea M Lerud

Chelsea Lerud
Executive Director
Iowa Travel Industry Partners

EXECUTIVE SUMMARY

Iowa Travel Industry Partners (iTIP), in collaboration with the Iowa Tourism Office, commissioned this analysis to evaluate Iowa's position and potential in the Meetings & Conventions (M&C) market. As competition intensifies and meeting planners seek more compelling and value-driven destinations, Iowa aims to understand how it can better meet market demand and identify where growth opportunities lie.

This analysis is informed by surveys of suppliers and meeting planners, interviews, a facility inventory, benchmarking research, visitor profiles, and other desk research.

Recommendations to enhance Iowa's performance in the Meetings & Conventions market are organized into four strategic categories:

Destination Development

1. Invest in facilities
2. Grow airlift
3. Location matters

Marketing & Messaging

1. Tell a compelling story of Iowa's facilities
2. Play to your meeting & convention strengths
3. Welcome plus-ones

Collaboration & Relationships

1. Continue being Iowa nice
2. Support trade show presence
3. Continue to focus on inter-agency relationship building

Advocacy & Education

1. Continue policy advocacy and incentive creation in support of meetings & conventions
2. Provide education on the value of tourism, and of meetings & conventions in particular

This report provides a foundation for Iowa to consider enhancements to its meetings & conventions market. By focusing on strategic destination investments, a compelling message, stronger relationships, and intentional education, Iowa can position itself to attract more meetings and conventions and deliver broader economic impact and greater visibility for its communities.

CONTENTS

INTRODUCTION

For four years, iTIP has been working to better understand and position the state to attract different travel sectors. This analysis, supported by both iTIP and the Iowa Tourism Office, focuses on meetings & conventions: what types of meetings & conventions may be a good fit for Iowa, what types of infrastructure or destination development investment would be most valuable, what messages may resonate best with meetings & convention planners, and what types of education and advocacy would benefit this effort. iTIP hired Whereabout, a destination strategy firm, to lead this analysis. Whereabout specializes in tourism strategy plans, destination development, sustainable tourism, and tourism-related research.

Like the travel and tourism industry as a whole, meetings & conventions had a significant decrease in business as a result of the Covid-19 pandemic onset in 2020. After a marked drop from 2019 to 2020, the midwest market for meetings & conventions has been showing a strong comeback. As seen in the table below, total booked convention center events, room nights, and attendance have shown growth from 2019 to 2024. Interestingly, the Midwest has been outperforming the nation on each of these indicators as well.[1] This demonstrates a solid recovery from the worst of the impacts of the pandemic. The Midwest has been outperforming what is being seen nationally in these same indicators:

2019—Q3 2024 CHANGES IN MEETING & CONVENTION INDICATORS

	Midwest	National
Total booked convention center events	**13.8%**	4.7%
Booked convention center event room nights	**11.4%**	5.0%
Booked convention center attendance	**23.6%**	9.6%

Similarly, the Midwest is one of the top-two regions in lead growth from the previous year:[2]

GROWTH IN LEADS FROM 2023 TO 2024, U.S.

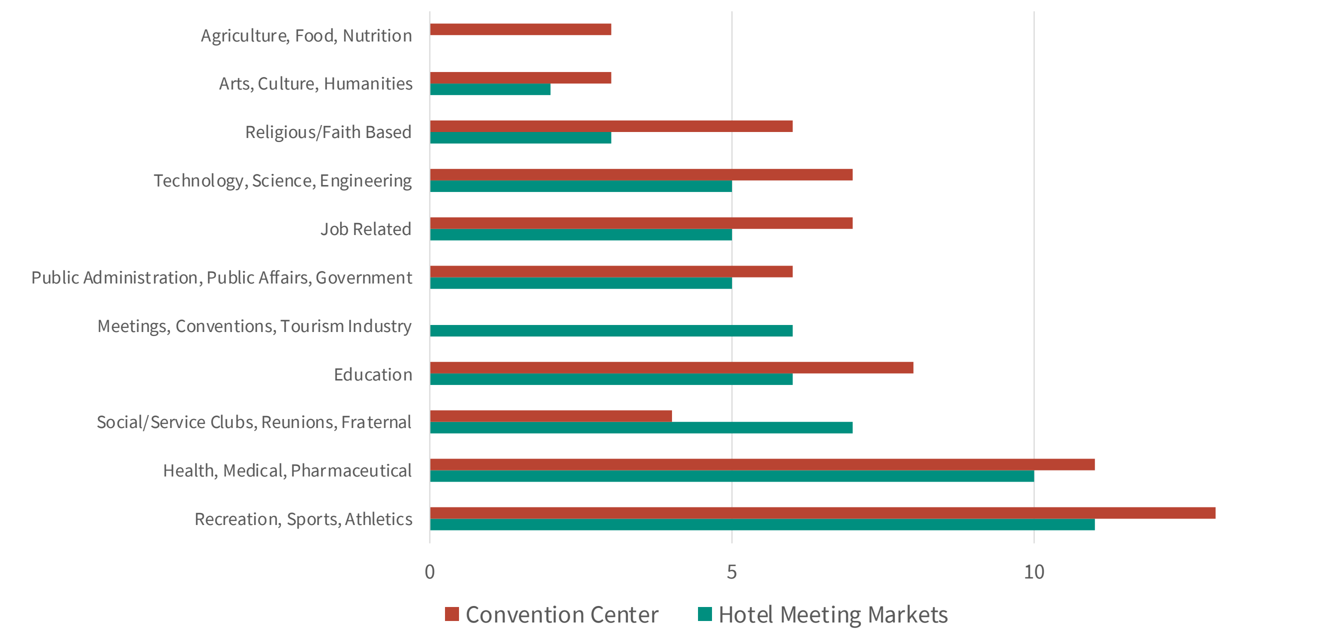
Region	% Growth
Midwest	**5.90%**
Northeast	7.20%
South/Southeast	3.60%
Southwest	3.50%
West/Pacific	-7.30%

In addition to this strong recovery through 2024 for meetings & conventions, live and hybrid conventions are increasingly common, and all-virtual conventions are waning.[3]

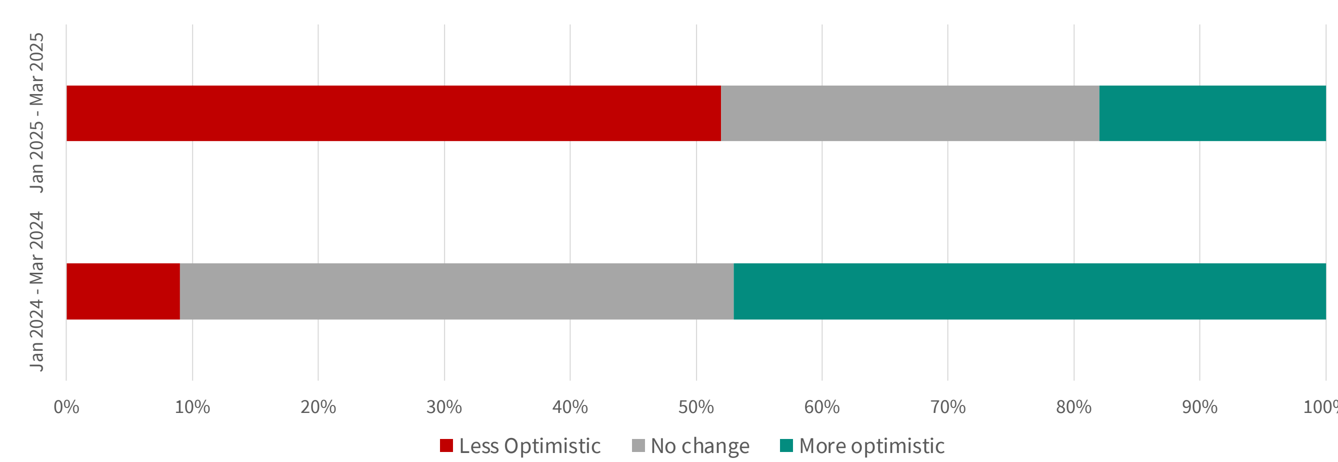
Looking at market segments, the strongest segments for both hotel and convention centers are recreation/sports/athletics and health/medical/pharmaceutical. There are some differences in the top 10 market segment leads for hotels and convention centers, as seen below.[4]

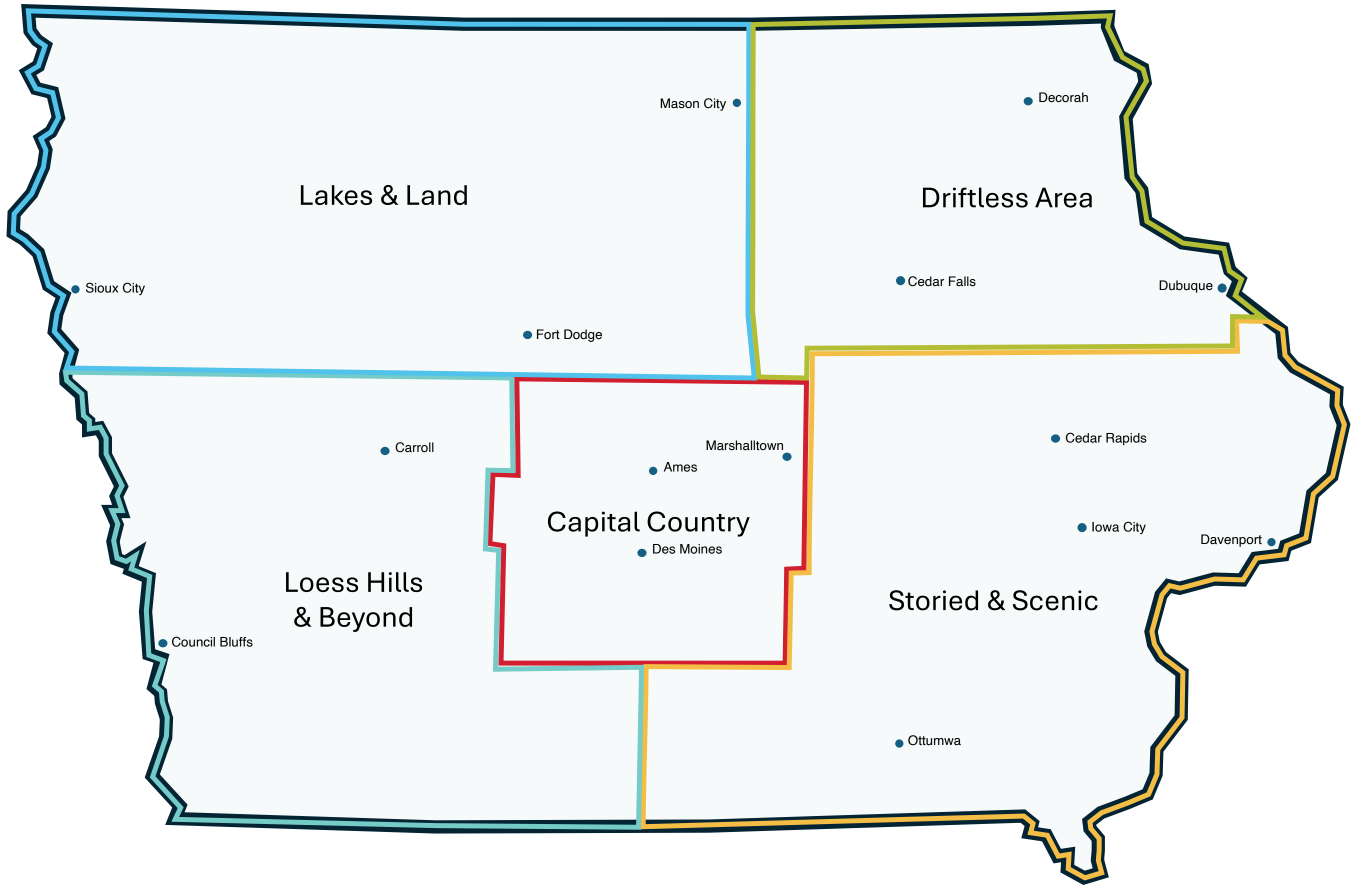
Recent political shifts in the US have provided an additional layer of dynamics to these trends. The Pulse survey with data through March 2025 demonstrates shrinking optimism on the outlook of meetings & events. In the same January - March 2025 period, over half of the event planners in the Pulse survey cited that the economic outlook, funding cuts, and social policy changes have negatively impacted their meetings, events, and travel programs, as seen at the bottom of this page.[5]

TOP MARKET SEGMENTS FOR THE MIDWEST: VARIANCE IN LEADS FROM 2019



HOW HAS YOUR OUTLOOK FOR YOUR MEETINGS AND EVENTS CHANGED OVER THE PAST TWO MONTHS?





This report presents background information and recommendations for Iowa to consider as it strategizes on how to grow this segment of the travel and tourism industry. Some of the data and recommendations are shared at a state level, while some are shared at a tourism area level. The Iowa Tourism Office developed the concept of Iowa's five tourism areas as a streamlined marketing strategy to better reflect traveler behavior and strengthen the state's tourism identity. These areas highlight the diversity of Iowa's landscapes and experiences, helping both visitors and planners more easily connect with what each region has to offer.

Lakes & Land

Named for the Iowa Great Lakes and native prairie landscapes, this region features outdoor recreation, music heritage, and wide-open spaces.

Loess Hills & Beyond

Centered on the rare Loess Hills formations, the name also nods to the cultural and natural experiences that stretch beyond the hills.

Capital Country

Anchored by the state capital, this region blends urban energy with surrounding rural charm and iconic landmarks.

Driftless Area

Named for its unique, unglaciated terrain, this scenic region features bluffs, trout streams, and outdoor adventure.

Storied & Scenic

A mix of rich history and Mississippi River views, this area reflects Iowa's cultural roots and natural beauty.

This five tourism area framework makes it easier to showcase Iowa's distinct destinations and connect them to meeting and convention opportunities.

METHODOLOGY

The information and recommendations contained in the report were gathered through the following activities, performed between December 2024 and June 2025:

Interviews

We interviewed 13 meeting & convention suppliers and 8 meeting & convention planners. Suppliers represent destination management organizations, convention and visitors bureaus, hotels, an airport representative, and attractions with meeting facilities. Planners represented professional associations, corporations, and educational groups.

Desk research

In addition to reviewing all background material provided by Iowa Travel Industry Partners and its team, we conducted internet research to understand trends in meetings & conventions.

Survey

Ninety individuals responded to a survey shared with meeting & convention suppliers and planners. Participation was incentivized for planners, a group that we believed to be harder to engage, by providing a drawing for a $100 gift card. While some questions were the same across suppliers and planners, there were sections unique to each. For suppliers, the survey asked about the size, type and duration of meetings & conventions they host, what they believe are their draws and limitations, and which cities and states they feel are their competitors. For planners, the survey asked about the size, type and duration of the meetings and conventions they plan for, their experience in Iowa, important attributes of host destinations, and what they see as Iowa's limitations related to meetings & conventions.

Inventory

We inventoried 99 meeting and convention facilities throughout Iowa using Cvent, focusing on facilities that could accommodate 150+ individuals. Where information on Cvent was vague, we pursued additional internet research. For each, we inventoried:

- Google and AAA ratings
- Year built and renovated (if applicable)
- Type
- Total meeting space
- Largest meeting space
- Number of meeting spaces
- Exhibit space
- Transportation accessibility
- Distance to airport
- Parking availability
- Awards

Statewide benchmarking

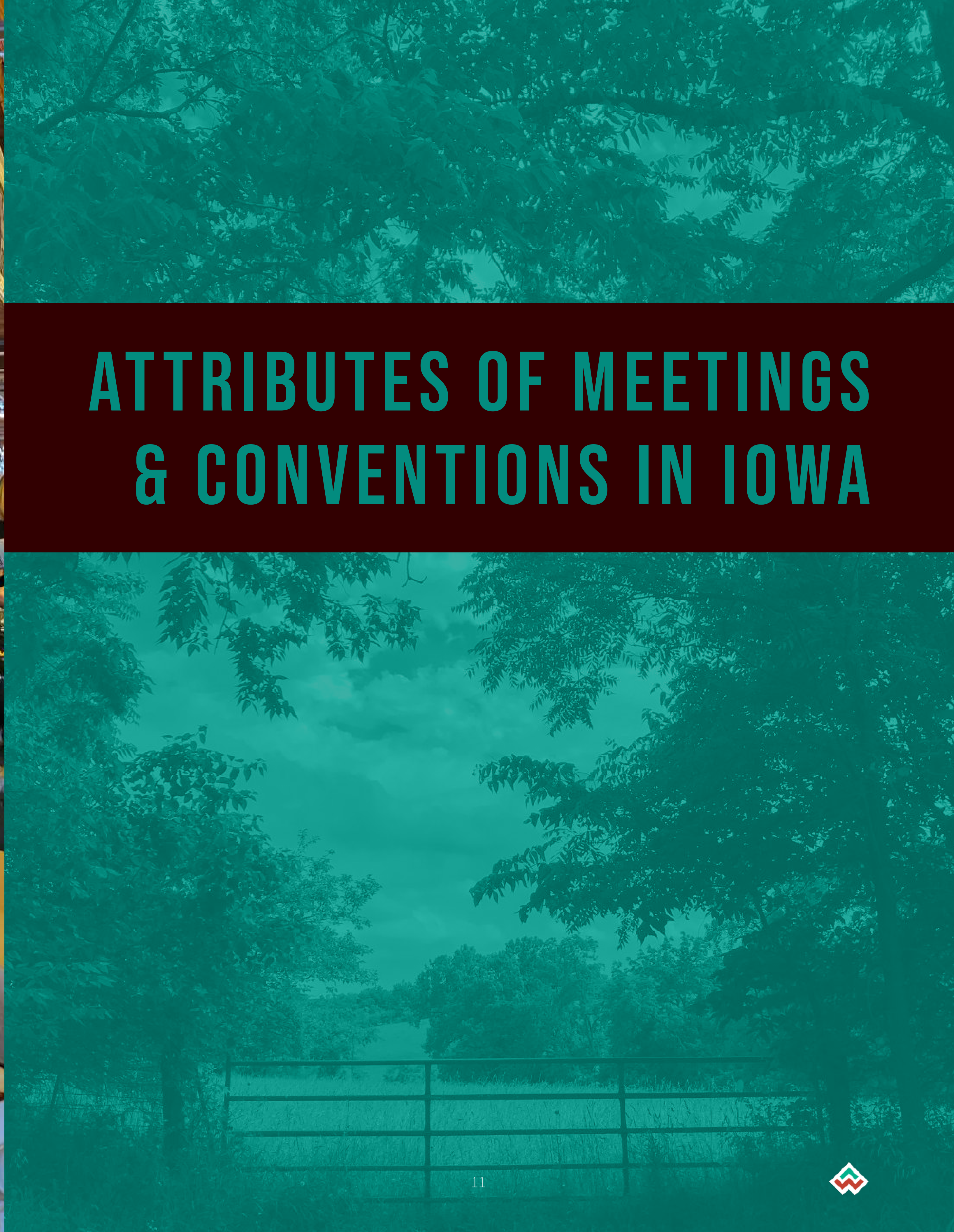
We assessed Iowa against its six surrounding states across a set of attributes that pertain to the visitor experience. The purpose of this is to provide a broad brushstroke comparison of where Iowa stands against its primary competitive set.

Benchmarking Facilities

We identified ten competitor cities in surrounding states, as suggested by the Task Force and as seen in the survey, and inventoried all facilities in these cities that could accommodate 150+ individuals. These ten competitor cities are:

- Peoria, IL
- Rockford, IL
- Minneapolis, MN
- Rochester, MN
- Kansas City, MO
- St. Louis, MO
- Omaha, NE
- Sioux Falls, SD
- Madison, WI
- Milwaukee, WI

We identified a representative sample of three meetings & convention facilities within each tourism area and gathered visitor location data to identify the ten most frequent non-Iowa origin ZIP codes for visitors to meetings & conventions within each tourism area. From those ZIP codes, we synthesized associated data for the mix of ZIP codes, creating urban and rural profiles where there were large groups of each. See Sources Cited (page 99) for a complete list of data sources that informed these profiles.



ATTRIBUTES OF MEETINGS & CONVENTIONS IN IOWA

ATTRIBUTES OF MEETINGS & CONVENTIONS IN IOWA

Meeting Types

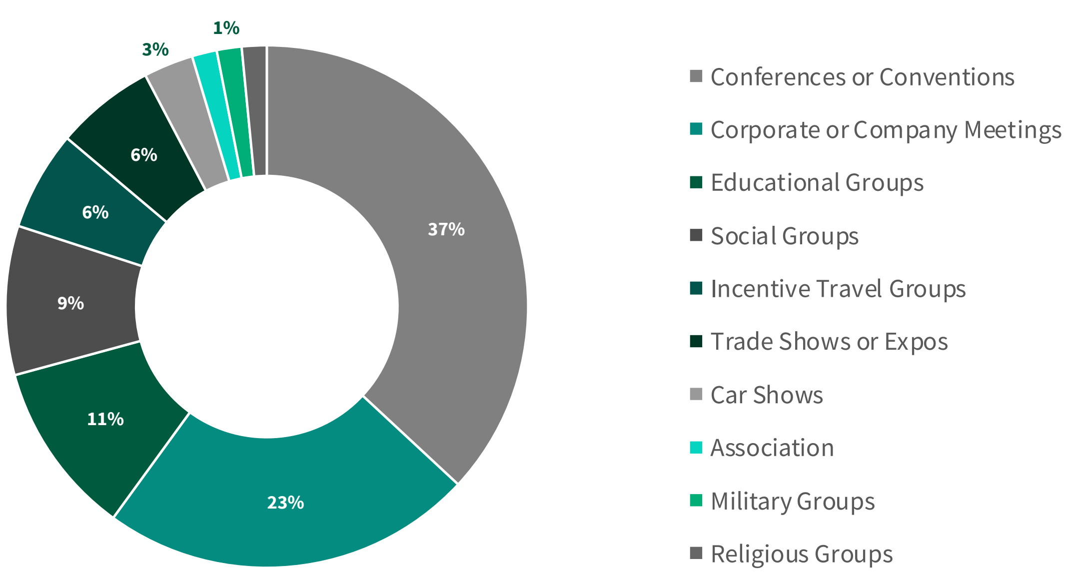
Of the 39 survey respondents who identified as a meeting & convention planner, the top three types of meetings they plan for are conferences/ conventions, corporate/company meetings, and educational groups. Of the 36 survey respondents who identified as suppliers, the three most common groups they host are corporate/company meetings, social groups, and educational groups.

Meeting Attendance

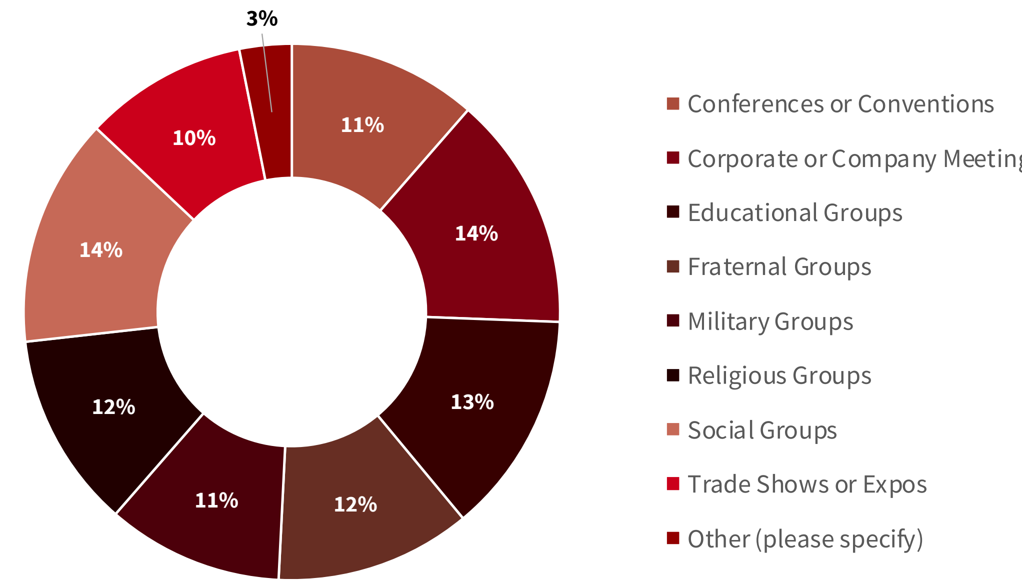
Nearly two thirds of the meeting planners indicate that their meetings typically involve 100-499 attendees. Interestingly, more meeting planners indicated they plan meetings between 1 and 49 attendees than they do between 50 and 99 attendees. Two thirds of suppliers also share that the meetings they are most commonly involved with are for those with 100-499 attendees. However, they are more involved with meetings of 50-99 attendees than they are those meetings with less than 50 attendees.

For both meeting planners and suppliers, the typical meeting is predominantly 1 - 3 days.

PLANNERS: THE MEETINGS I PLAN OR BOOK ARE FOR THESE KINDS OF GROUPS (N=39)



SUPPLIERS: MY FACILITY OR DESTINATION HOSTS THESE KINDS OF GROUPS (N=36)



PLANNERS & SUPPLIERS: SIZES OF GROUPS (N=65)

Quality of Visitor Experience

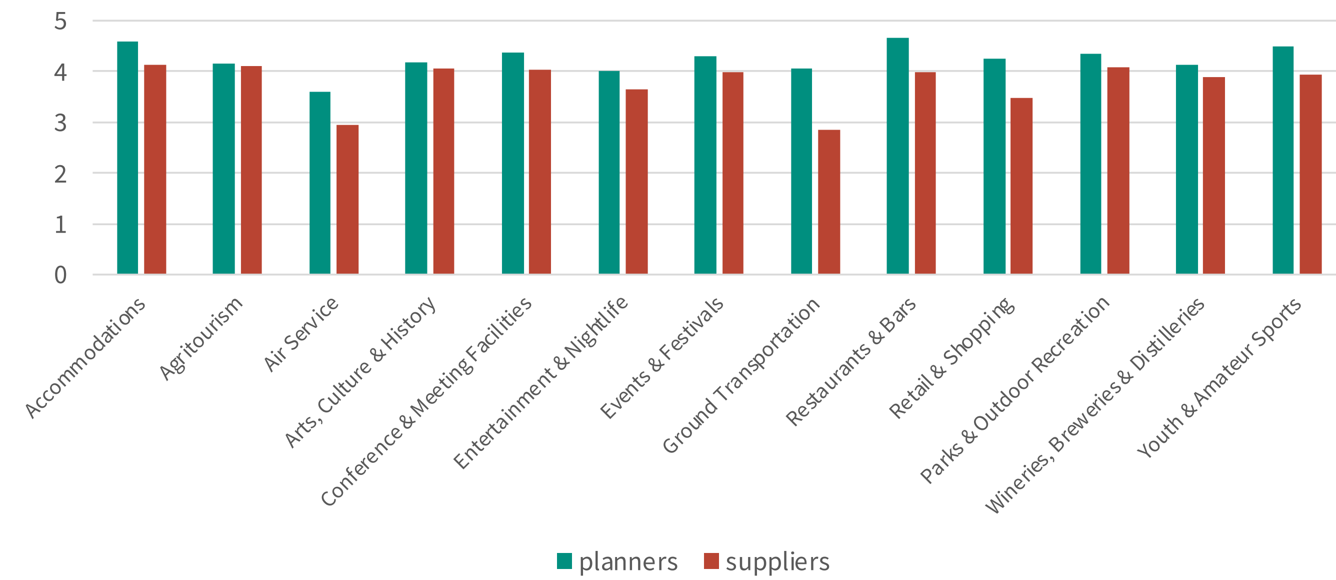
The survey asked respondents to rate the quality of the visitor experience across a series of attributes. Generally, air service and ground transportation rated the lowest average ratings, while accommodations and restaurants & bars receive the highest average ratings.

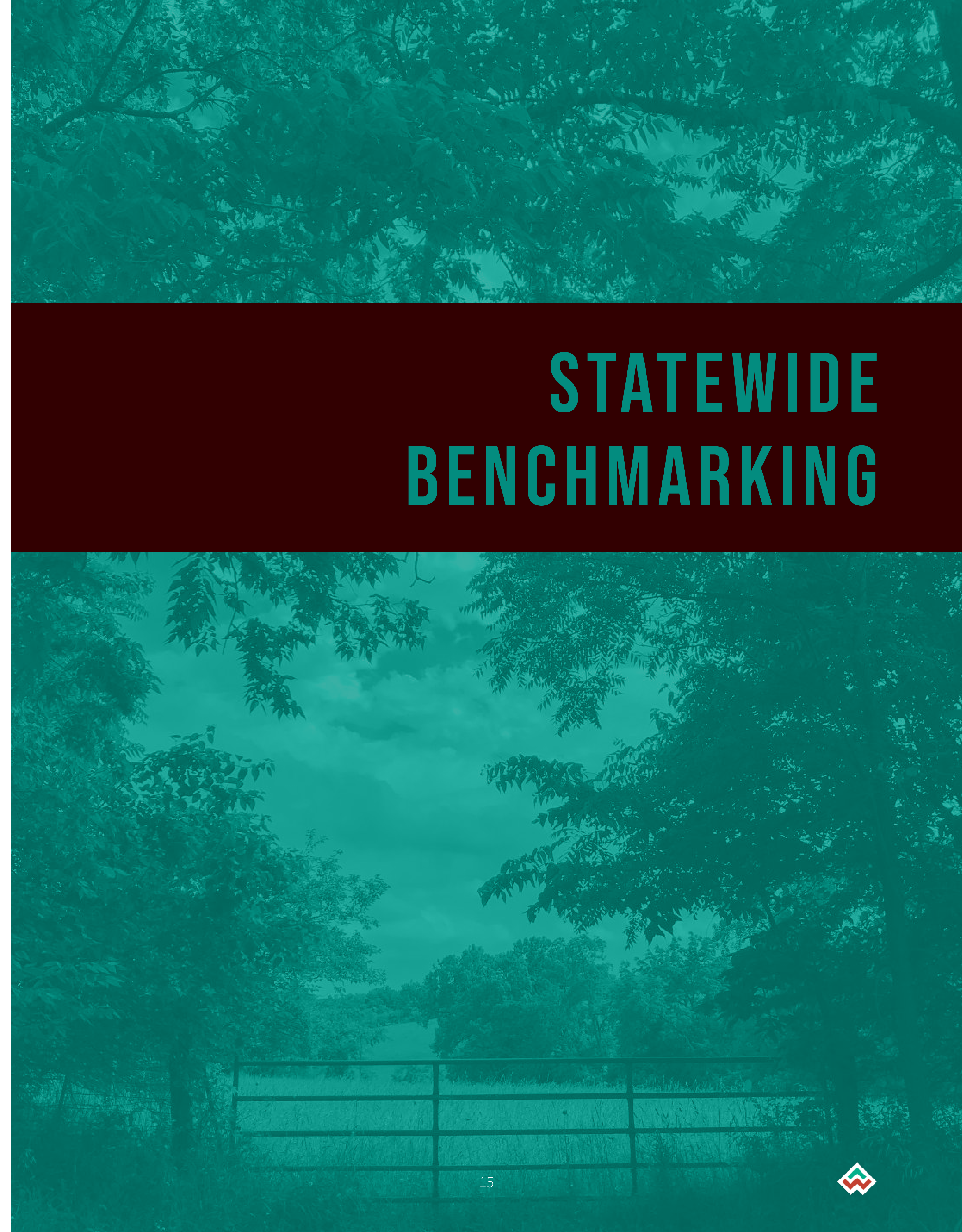
Meeting planners rate the quality of visitor experience high across most dimensions. Air service is the one dimension that lags behind the others.

Suppliers echo the lower rating for air service, and also identify ground transportation as a dimension that could have marked improvement. Across all dimensions, suppliers rate the quality of visitor experience lower than meeting planners do.

Both suppliers and planners perceive the quality and affordability of facilities as top reasons a meeting is committed to a specific place. Suppliers also perceive facility service as a top reason, while planners perceive facility availability as a top reason.

PLANNERS & SUPPLIERS: VISITOR EXPERIENCE (N=53)





STATEWIDE BENCHMARKING

STATEWIDE BENCHMARKING

Iowa often considers the six surrounding states as its primary competitors: Illinois, Minnesota, Missouri, Nebraska, South Dakota, and Wisconsin. We gathered data on how Iowa performs compared to these states on a few general attributes, as detailed below. The attributes examined include: infrastructure, hotel accommodations, restaurant rankings, and a “Happiest States” index. These were selected because they help to tell the story of how each state meets travel needs, or the general culture and climate of the state. These rankings are taken into consideration later in this analysis when presenting statewide recommendations.

Generally, Iowa’s strengths compared to other states are:

- Road infrastructure
- Being a “Happy State”

Generally, Iowa scores worse than the primary competitor states in:

- Aviation infrastructure
- Restaurant Rankings

Additionally, we performed a selective comparison of meeting & convention facilities in these competitor states.

Infrastructure

The American Society of Civil Engineers develops statewide report cards for the quality of infrastructure. The scores for Iowa and surrounding states for quality of aviation facilities and road quality can be seen below.[6] The grades consider capacity, condition, funding, future need, operation & maintenance, public safety, resilience, and innovation. Iowa’s aviation score is the lowest of the group, while its road score is the highest.

ASCE INFRASTRUCTURE REPORT CARD

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

Note: infrastructure scores were not reported for Nebraska or South Dakota

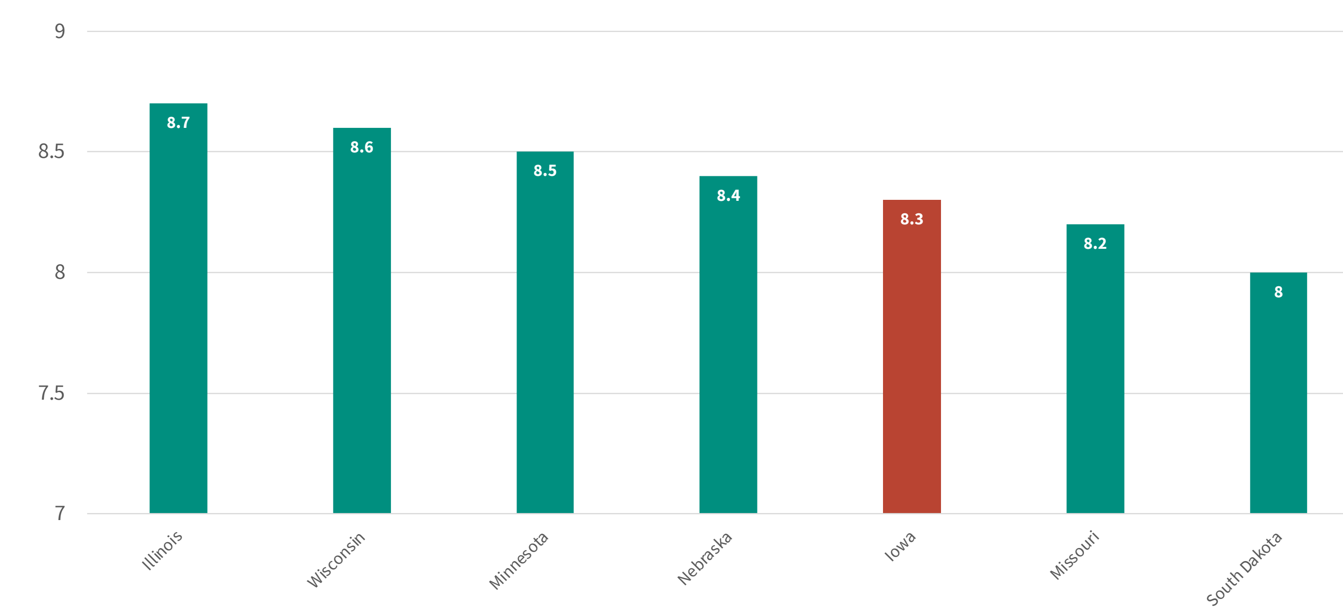
While ASCE considers the overall condition of Iowa’s aviation infrastructure as relatively stable. The organization notes that pavement conditions are showing some deterioration with age. Additionally, ASCE notes that while aviation funding has grown in recent years, investments are less than the need to replace or repair components in poor condition.

ASCE notes that a 2015 increase in the state fuel tax helped fund pavement improvements, resulting in a decrease from 29% to 25% since 2019 of roads in poor or mediocre condition. A similar improvement is noted in the condition of rural roads over the same time period, with a decrease from 15% to 6% of rural roads considered in poor condition.

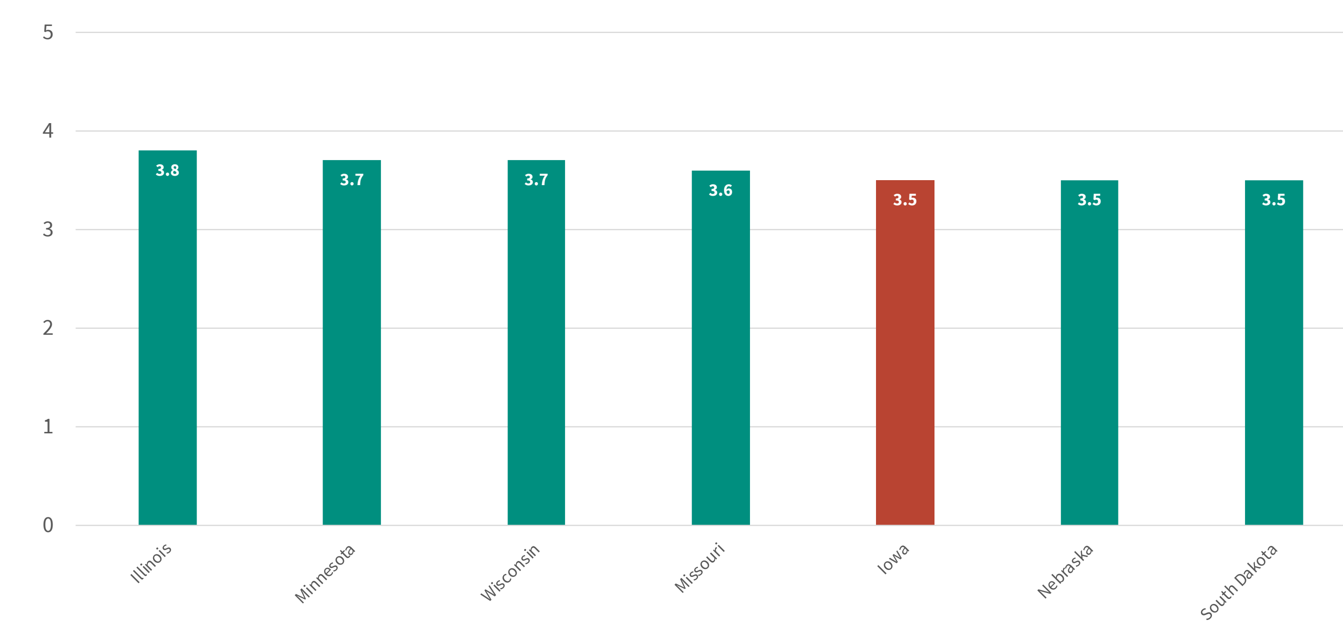
Hotel Accommodations

By aggregating TripAdvisor scores and insights from the U.S. News and World Report, Iowa’s hotel accommodations rank 8.3 out of 10, fifth of the seven states seen below.[7]

HOTEL ACCOMMODATIONS RANKINGS



RESTAURANT RANKINGS



Factors that contributed to a lower score include: limited luxury and upscale offerings compared to states like Illinois and Minnesota; a less diverse portfolio of hotels compared to cities like Chicago, IL or Minneapolis, MN, and limited national brand flagships, such as a Four Seasons or Waldorf Astoria.

Factors that are a strength for Iowa are: unique boutique and historic lodging, a solid value for the money, and excellent marks for cleanliness and hospitality.

Restaurants

By aggregating Yelp restaurant rankings, Iowa's restaurants receive 3.5 out of 5 stars, on par with Nebraska and South Dakota.[8] Factors that contributed to lower Iowa's score include: fewer high-density culinary cities; less diversity in different cuisines offered, and variability in restaurant ambience. Factors contributing to a stronger score for Iowa include: the ability to source local ingredients and be farm-to-table, and value for price.

Happiest States

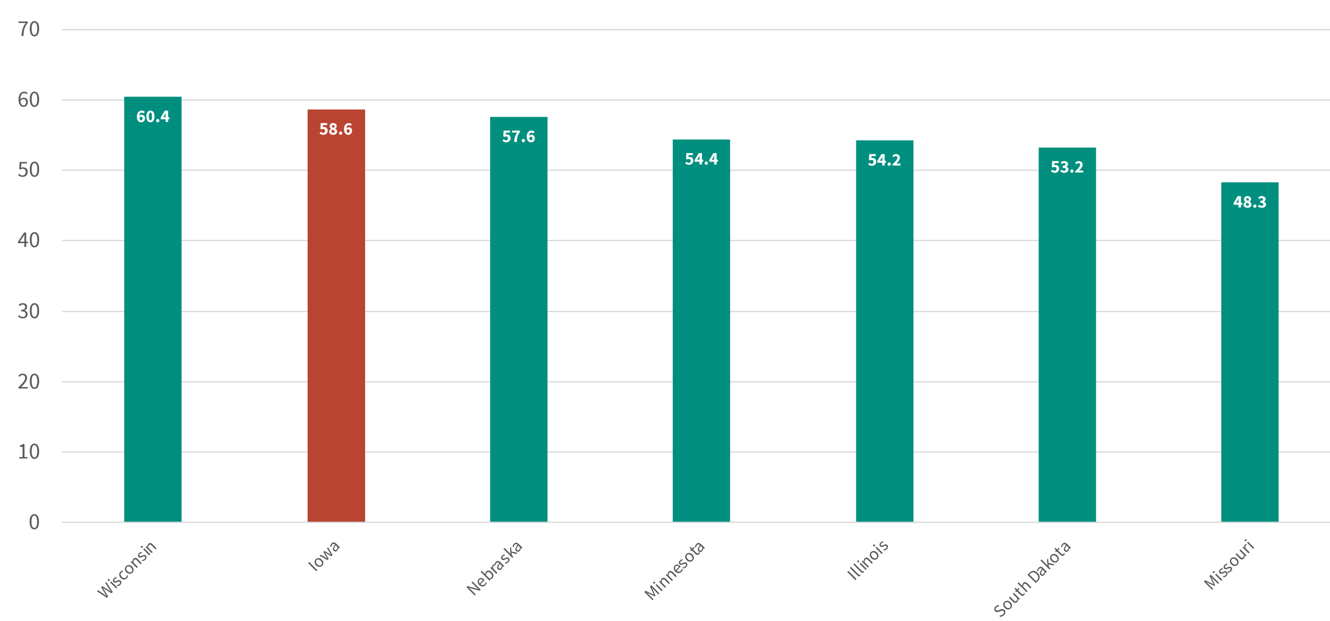
World Population Review is an online data resource that provides rankings and data on demographics and different world geographies. One such ranking is a Happiest State ranking, that evaluates 30 indicators covering emotional and physical well-being, work environment, and community & environment, such as job security, rate of adult depression, and income growth.[9] Positive assessments on these types of attributes are what make a place a desirable place to live, and desirable places to live are more likely to be desirable places to visit. Iowa ranks 19th amongst all states with a score of 58.6 on a 0-100 scale where 100 is the happiest.

While Iowa did not score poorly in any one area, the study notes Iowa has less urban greenspace compared to peers. Attributes in which Iowa is strong include: an overall very low unemployment rate, and a higher frequency of volunteerism which demonstrates a stronger sense of community and social cohesion.

Meeting & Convention Facilities

We identified ten competitor cities in surrounding states, and inventoried all meeting & convention spaces that can accommodate 150+ attendees in these cities across the same attributes as those inventoried in Iowa. Rather than aggregate these to the state level, the table on page 19 shares the findings from these peer cities as well as the 9 Iowa

HAPPIEST STATE RANKINGS, 2025



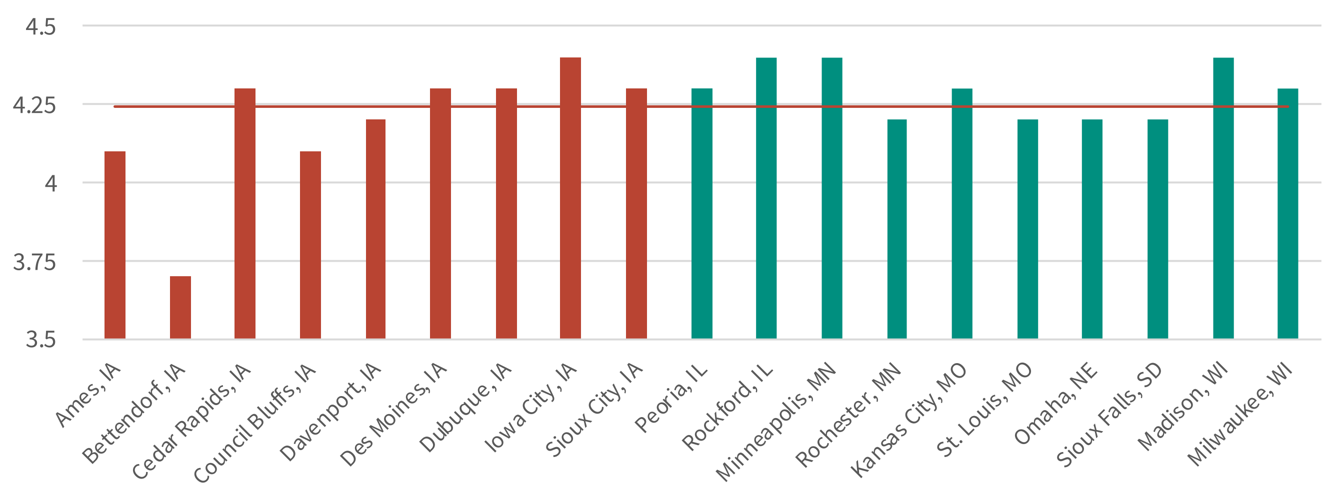
MEETING & CONVENTION FACILITIES: BENCHMARKS

City	Avg. Google Rating	Avg. Yr. Built	Avg. Yr. Renovate	Hotel Room Count	Avg. Meeting Space	Avg. # Meeting Room	Avg. Largest SF Room	Avg. Exhibit SF	Avg. Miles to Airport
Ames, IA	4.1	2000	2015	116	7,852	4	4,138	—	27
Bettendorf, IA	3.7	2002	2011	310	22,229	6	11,298	15,000	7.2
Cedar Rapids, IA	4.3	2002	2016	165	26,159	11	10,686	15,650	10.2
Council Bluffs, IA	4.1	2000	2014	169	54,976	7	12,354	12,000	6.3
Davenport, IA	4.2	1978	2013	144	24,788	10	10,021	13,333	40.6
Des Moines, IA	4.3	1974	2016	215	80,496	10	24,489	33,933	7.2
Dubuque, IA	4.3	1963	2012	153	35,832	9	12,867	22,000	8.8
Iowa City, IA	4.4	1997	2021	150	11,941	5	4,336	5,832	23.2
Sioux City, IA	4.3	1991	2020	146	26,461	10	14,170	38,667	7.6
Peoria, IL	4.3	1977	2013	241	43,572	11	13,289	61,500	6.8
Rockford, IL	4.4	2001	2014	139	45,706	5	7,378	16,500	8.3
Minneapolis, MN	4.4	1991	2015	271	31,673	13	10,423	48,665	12.0
Rochester, MN	4.2	1975	2018	206	54,828	10	13,664	12,000	5.7
Kansas City, MO	4.3	1983	2016	275	29,069	9	19,247	65,434	15.8
St. Louis, MO	4.2	1985	2018	294	49,464	16	24,923	43,810	11.2
Omaha, NE	4.2	1984	2018	199	35,214	8	11,540	29,231	6.9
Sioux Falls, SD	4.2	1998	2018	187	17,665	9	9,998	30,190	4.0
Madison, WI	4.4	1985	2018	193	76,418	9	13,699	36,760	6.7
Milwaukee, WI	4.3	1990	2017	206	79,871	16	15,616	50,571	8.8

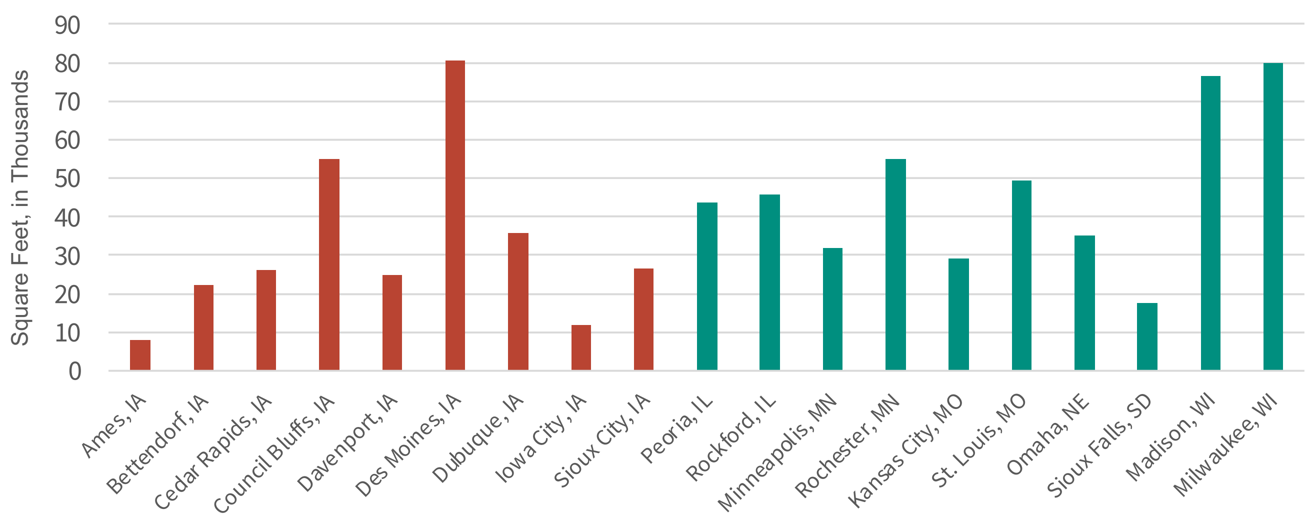
cities that have at least 4 meeting & convention centers that can accommodate 150+ attendees.

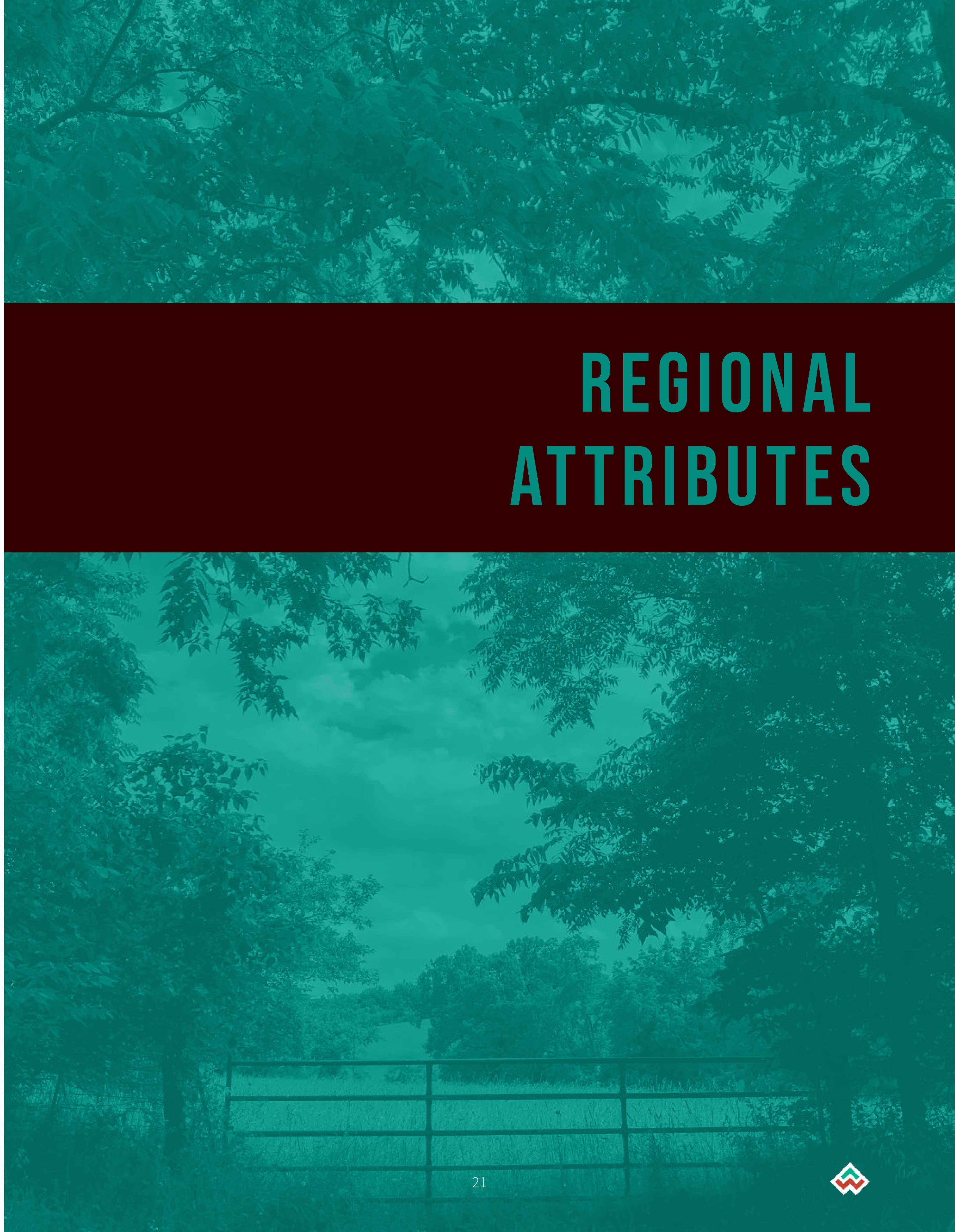
The average Google rating for the facilities in Iowa cities is a little lower than the average across the other cities. For those facilities with an attached hotel, Iowa's facilities typically have fewer rooms in those hotels than facilities in the peer cities. The average total meeting space, number of rooms, largest room, and exhibit space are smaller in Iowa cities than in peer cities with just a few exceptions.

AVERAGE GOOGLE FACILITY RATINGS



AVERAGE MEETING SPACE PER FACILITY





REGIONAL ATTRIBUTES

REGIONAL ATTRIBUTES

We used survey findings, a facility inventory, and visitor demographics & psychographics research to analyze the relative attributes of each of Iowa's five tourism areas. The charts informing survey findings are included at the end of this section.

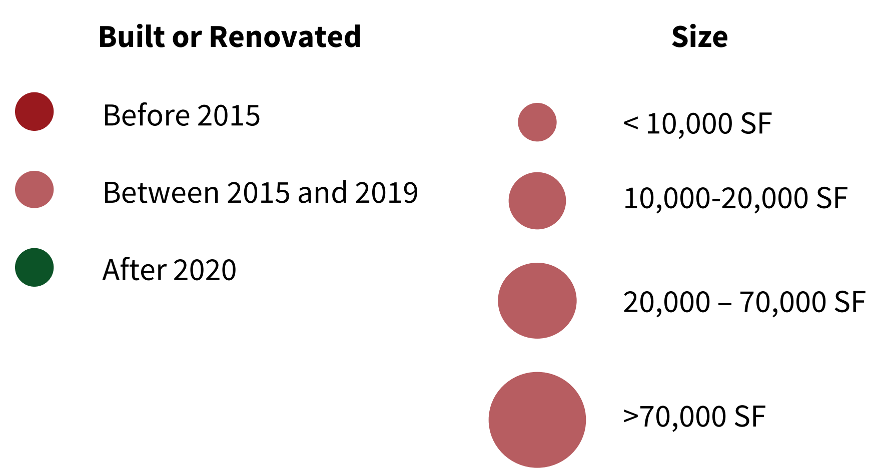
Capital Country

This tourism area's quality of visitor experience as rated by planners is at the average or above of the rankings for each tourism area. Agritourism and arts, culture & history rated below average while other attributes are at or above average. Suppliers rated this area as at or above the average for each category comprising the quality of visitor experience. See page 34 for charts.

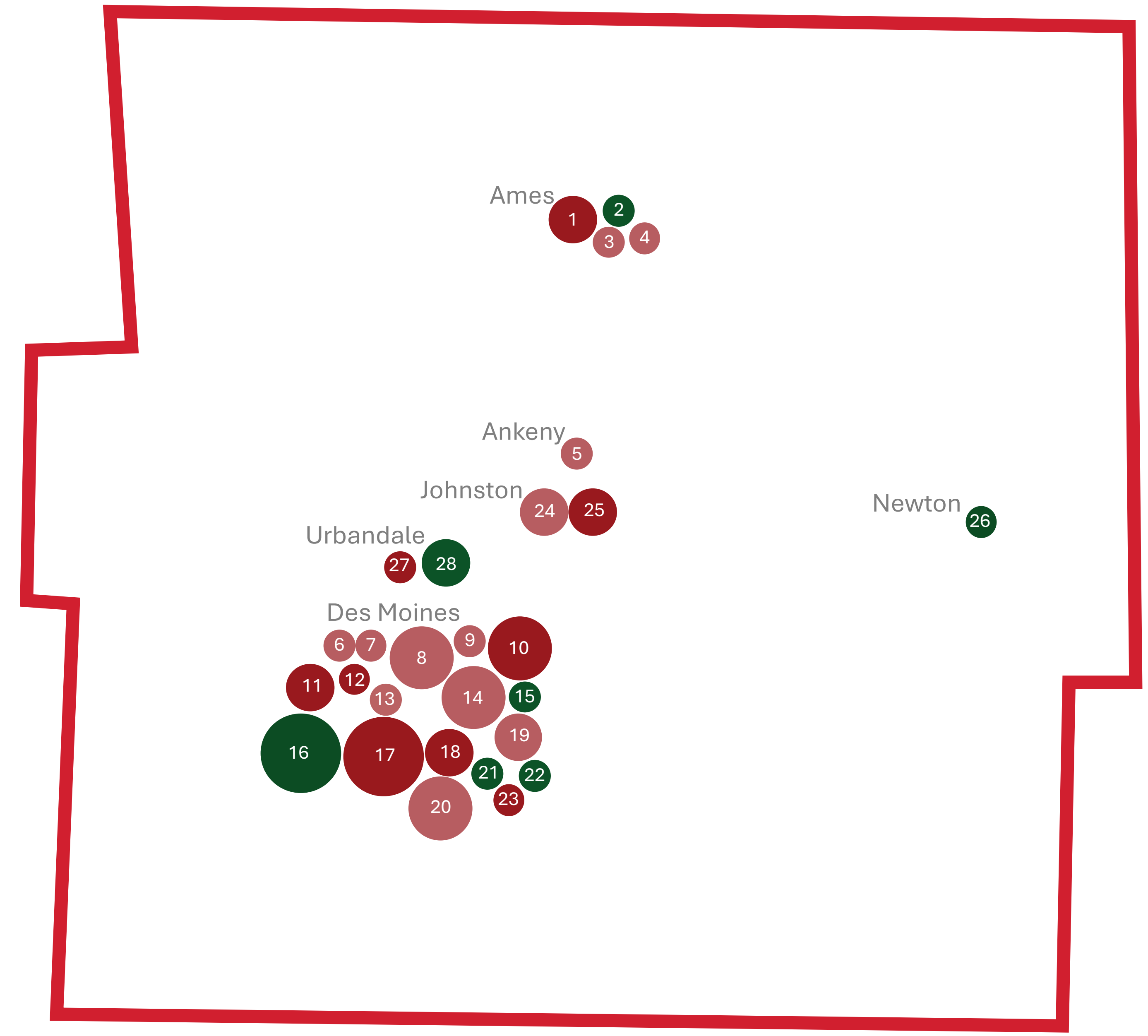
In terms of the reasons meetings are booked at a particular facility, the only ranking that stands out is how suppliers rate the accessibility of facilities for attendees with disabilities; suppliers in this geography identify that as a top reason significantly more than the other tourism areas. See pages 34- 35 for charts.

Of the 99 facilities inventoried, 28 are located in Capital Country. The average Google rating was 4.27/5, slightly higher than the average across all tourism areas: 4.25/5. On average, facilities were originally constructed in 1984—older than the average in other tourism areas—with the average year of renovation of 2015. For those facilities with an attached hotel, the hotel has on average 185 rooms. Facilities averaged 53,138 square feet across 8.8 rooms. The average exhibit space was 28,773 square feet, above the average across all facilities inventoried. More details on this inventory can be found in the appendix.

LEGEND FOR MAPS IN THIS SECTION



CAPITAL COUNTRY MAP



Capital Country Meeting & Convention Attendees

Frequent meeting & convention attendees in Capital Country fall into two main groups: Urban Adventurers and Heritage Explorers. A brief overview of each is below; full demographic and psychographic profiles are included in the appendix on page 90.

Urban Adventurers

The Urban Adventurers come from some of the most dynamic metro areas in the country—Chicago IL, Los Angeles CA, Dallas TX , and the Bay Area of California among them. These visitors are diverse in race and ethnicity, highly educated, and occupy a wide spectrum of income levels. Many are dual-income professionals in their 30s and 40s, with household incomes often ranging from $60K to over $150K. Their values lean progressive, with interests rooted in cultural enrichment, personal growth, and social impact. They reside in a mix of urban apartments and suburban homes, balancing convenience with quality of life.

They are digitally immersed, preferring streaming

CAPITAL COUNTRY MEETING FACILITIES

No.	Facility	City	Built	Renovated	Meeting SF
1	Gateway Hotel & Conference Center	Ames	1978	2005	17,400
2	Hilton Garden Inn Ames	Ames	2008	2021	2,240
3	Radisson Hotel Ames Conference Center at ISU	Ames	2000	2018	9,266
4	TownePlace Suites Ames	Ames	2015	—	2,500
5	Courtyard Des Moines Ankeny	Ankeny	2008	2018	6,300
6	Baymont by Wyndham Des Moines Airport	Des Moines	1995	2016	4,000
7	Clarion Inn - Des Moines	Des Moines	1974	2017	8,000
8	Des Moines Marriott Downtown	Des Moines	1981	2018	33,851
9	Drury Inn & Suites - West Des Moines, IA	Des Moines	2008	2018	3,210
10	Embassy Suites by Hilton Des Moines Downtown	Des Moines	1990	2011	20,000
11	Hilton Des Moines Downtown	Des Moines	2018	2018	14,000
12	Hilton Garden Inn West Des Moines	Des Moines	2005	2005	8,818
13	Holiday Inn Des Moines DTWN - Mercy Area	Des Moines	1972	2019	8,650
14	Holiday Inn Des Moines-Airport/Conf Center	Des Moines	1975	2018	34,000
15	Hotel Fort Des Moines, Curio Collection by Hilton	Des Moines	1919	2021	14,000
16	Iowa Events Center (multiple buildings)	Des Moines	2005	2024	236,500
17	Iowa State Fairgrounds	Des Moines	1911	2010	1,000,000
18	Ramada by Wyndham Des Moines Tropics Resort & Conference Center	Des Moines	1970	1999	10,000
19	Renaissance Des Moines Savery Hotel	Des Moines	1919	2018	12,053
20	Sheraton West Des Moines Hotel	Des Moines	1986	2018	22,321
21	Surety Hotel	Des Moines	1913	2020	6,488
22	The Rewind West Des Moines, Tapestry Collection by Hilton	Des Moines	2008	2020	4,420
23	West Des Moines Marriott	Des Moines	1980	2012	8,623
24	Hilton Garden Inn Des Moines/Urbandale	Johnston	2004	2017	11,000
25	Stoney Creek Hotel & Conference Center - Johnston	Johnston	2001	—	10,240
26	DMACC Newton Conference Center	Newton	2010	2020	7,115
27	Fairfield Inn & Suites Des Moines Urbandale	Urbandale	2014	—	2,000
28	Holiday Inn & Suites Des Moines-Northwest	Urbandale	1974	2021	17,000

services and social media platforms like Instagram and LinkedIn over traditional media. Dining out, exploring art and music, and engaging in outdoor recreation are core to their lifestyle. When traveling, they seek destinations that combine authenticity with sophistication—boutique hotels, public art, culinary experiences, and walkable districts. They typically travel multiple times a year, often by plane, and are drawn to Iowa's Capital Country for its blend of culture, events, and civic amenities. These visitors want to do, see, and share—especially when a destination surprises them with depth and diversity.

Heritage Explorers (Rural ZIPs)

The Heritage Explorers are rooted in rural communities where tradition, self-reliance, and community define everyday life. Coming from areas like La Farge, WI and parts of rural Nevada, they are older on average (many aged 45–65+) and predominantly White. They tend to own their homes outright or with minimal debt, often in small towns where the cost of living is low. Their educational attainment skews toward high school or some college, and their household incomes fall within modest but stable ranges of $40K–$65K.

These visitors favor experiences that reflect values of simplicity, family, and heritage. They're loyal travelers—returning to destinations that feel familiar and trustworthy. While not typically influenced by trends, they are deeply influenced by reputation and word-of-mouth. Their media use is rooted in local TV, AM/FM radio, and Facebook. When they visit Iowa's Capital Country, they look for clean, comfortable lodging, accessible parking, and attractions that combine history, family fun, and natural beauty. Traveling a few times a year, often by car, they prefer leisurely road trips, fairs, and affordable dining. They may not travel far or often, but when they do, they want it to count.

Driftless Area

This tourism area's quality of visitor experience as rated by planners is generally good, with air service, events & festivals, and wineries, breweries & distilleries stronger when compared to other tourism areas. Suppliers rated this area as on par with other areas, though they rate the quality of air service lower than other tourism areas.

Of the 99 facilities inventoried, 14 are located in the Driftless Area. The average google rating was 4.31/5, higher than the average across all tourism areas: 4.25/5. On average, facilities were originally constructed in 1981—the oldest average age in all tourism areas—with the average year of renovation of 2013. For those facilities with an attached hotel, the hotel has on average 122 rooms. Facilities averaged 26,542 square feet across 6.7 rooms. The average exhibit space was 17,513 square feet, below the average across all facilities inventoried. More details on this inventory can be found in the appendix.

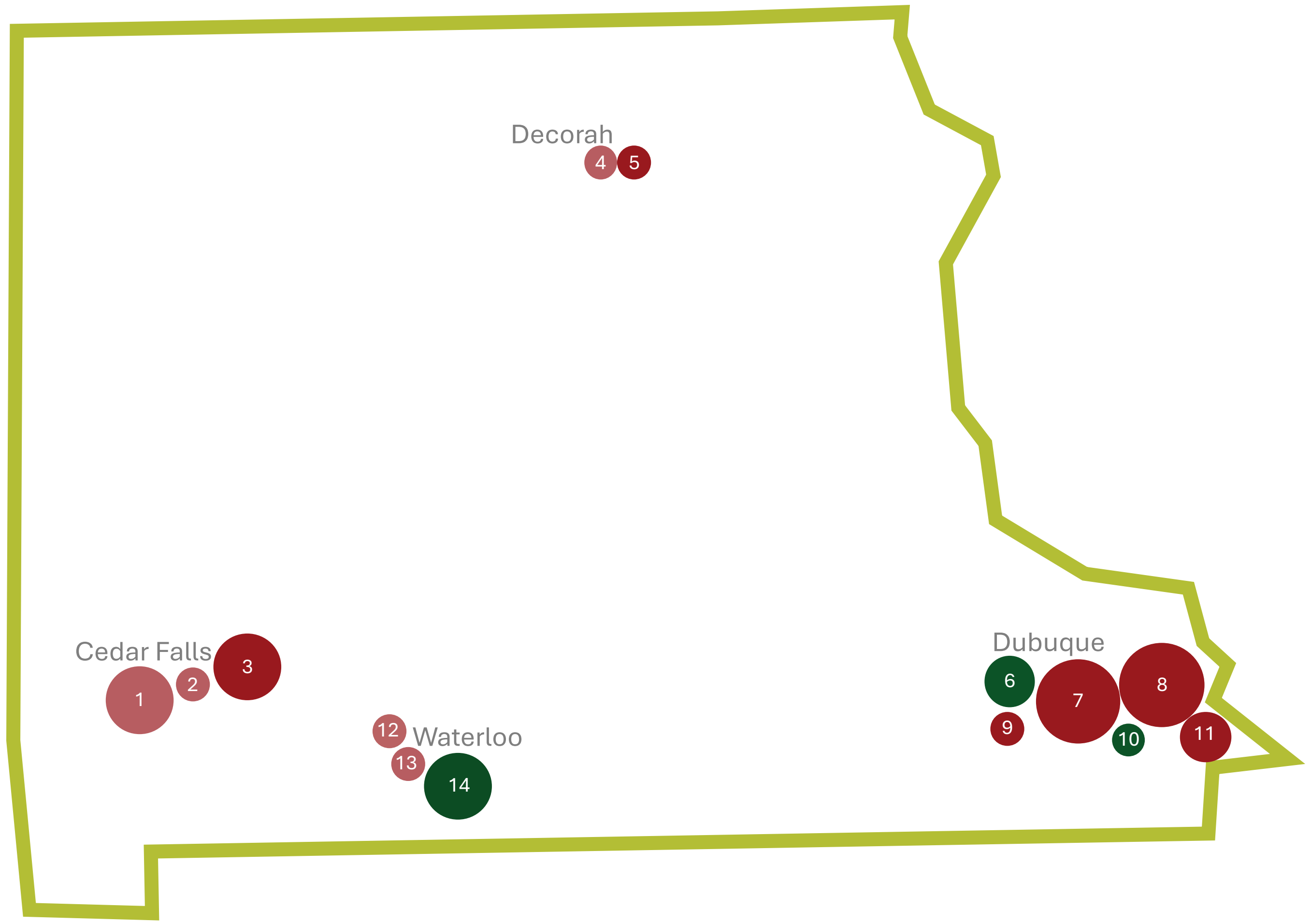
Driftless Area Meeting & Convention Attendees

Frequent meeting & convention attendees in the Driftless Area fall into two main groups: Eco-Curious Explorers and Rooted Traditionalists. A brief overview of each is below; full demographic and psychographic profiles are included in the appendix on page 92.

Eco-Curious Explorers

The Eco-Curious Explorers hail from diverse metro and suburban communities like Sacramento CA, Milwaukee WI, and Sheboygan WI. These visitors tend to be younger to middle-aged adults—many are Millennials and Gen X—with strong environmental values, wellness interests, and a desire for authenticity. They are moderately to highly educated and represent a broad income spread, typically between $50K and $120K. Many work in education, healthcare, public service, or creative fields, and they enjoy flexible schedules that allow for multiple trips per year.

DRIFTLESS AREA MAP



These travelers are drawn to the Driftless Area's unspoiled landscapes, historic towns, and agritourism. They value sustainability, artisanal experiences, and natural beauty. Their media habits skew digital—streaming, podcasts, and social platforms like Instagram and Pinterest are popular. Dining preferences lean local and organic, with an interest in farmers markets and farm-to-table restaurants. They're brand-flexible but environmentally mindful, often seeking experiences that align with their values. In Iowa, they seek hiking trails, river towns, art walks, and unique local makers—places where they can connect with nature and community alike.

Rooted Traditionalists

Rooted Traditionalists represent the deeply local, rural populations of the Driftless Area—places like Mount Carroll IL and Warren WI. These visitors are often older adults with strong community ties, modest incomes, and a preference for traditional values. Many are long-time homeowners, married or retired, and prioritize stability, family, and regional pride. Their ZIP codes reflect smaller populations with strong agricultural or small-business economies.

They fall into lifestyle groups such as "Country Comfort" and "Rustic Living"—practical, reserved, and value-driven. Their media habits include local TV, newspapers, and Facebook. They enjoy activities tied to nature, such as fishing, hunting, fairs, or local music events. Travel for this group is practical and modest—usually regional car trips, visiting family, or enjoying simple leisure. In Iowa's Driftless Area, they are attracted to scenic byways, antique shops, small-town museums, and local diners—places that feel familiar, comfortable, and welcoming.

DRIFTLESS AREA MEETING FACILITIES

No.	Facility	City	Built	Renovated	Meeting SF
1	Bien Venu Event Center	Cedar Falls	2019	—	44,425
2	Diamond Event Center	Cedar Falls	2018	—	6,259
3	Hilton Garden Inn Cedar Falls	Cedar Falls	2012	2012	32,779
4	Fairfield Inn & Suites Decorah	Decorah	2017	—	2,500
5	Hotel Winneshiek	Decorah	1905	2000	5,380
6	Best Western Plus Dubuque Hotel & Conference Center	Dubuque	1979	2022	12,725
7	Grand Harbor Resort And Waterpark	Dubuque	2002	2012	86,000
8	Grand River Center	Dubuque	2003	—	86,000
9	Hilton Garden Inn Dubuque Downtown	Dubuque	2005	2005	6,670
10	Holiday Inn Dubuque/Galena	Dubuque	1991	2023	9,599
11	Hotel Julien Dubuque	Dubuque	1839	2009	14,000
12	Courtyard Waterloo Cedar Falls	Waterloo	2017	—	4,500
13	Isle Casino Hotel Waterloo	Waterloo	2007	—	5,000
14	Waterloo Convention Center at Sullivan Brothers Plaza	Waterloo	1970	2021	40,000

Lakes & Land

This tourism area's quality of visitor experience as rated by planners is above average in nearly every attribute. Agritourism and air service are the two attributes in which this tourism area rates lower than other areas. In comparison, suppliers rated this area lower than meeting planners, and lower compared to other tourism areas.

In terms of the reasons meetings are booked at a particular facility, planners identified affordability, the proximity to other things for attendees to do, and facility quality as important attributes when selecting a facility. Suppliers place less importance on affordability as compared to other factors.

Of the 99 facilities inventoried, 14 are located in Lakes & Land. The average google rating was 4.28/5, higher than the average across all tourism areas: 4.25/5. On average, facilities were originally constructed in 1988 with the average year of renovation of 2019. For those facilities with an attached hotel, the hotel has on average 112 rooms. Facilities averaged 21,471 square feet across 6.2 rooms. The average exhibit space was 28,400 square feet, below the average across all facilities inventoried. More details on this inventory can be found in the appendix.

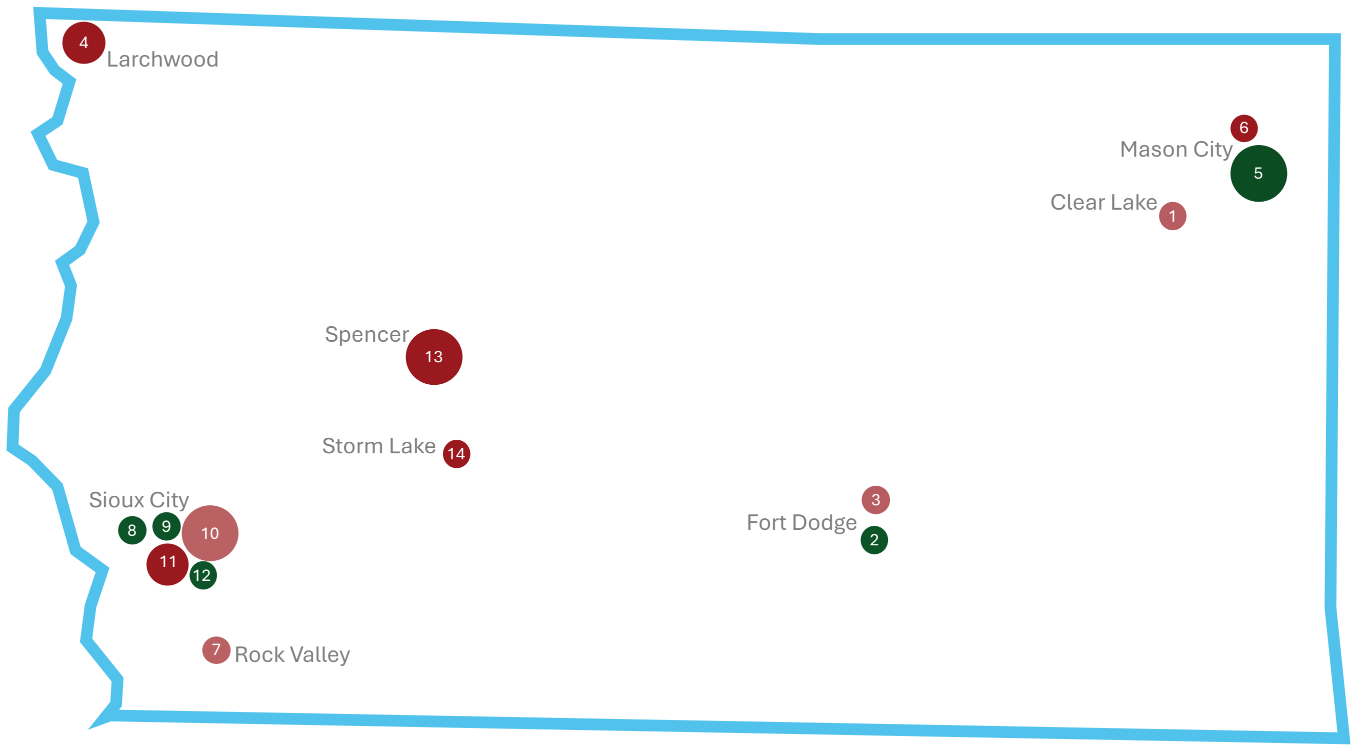
Lakes & Land Meeting & Convention Attendees

Frequent meeting & convention attendees in Lakes & Land can be described as Comfort Seekers of the Prairie. A brief overview of this visitor profile is below; a full demographic and psychographic profile is included in the appendix on page 94.

Comfort Seekers of the Prairie

The Comfort Seekers of the Prairie come from the Sioux Falls, SD metro and surrounding smaller towns like Yankton, Vermillion, and Worthing-

LAKES & LAND AREA MAP



LAKES & LAND AREA MEETING FACILITIES

No.	Facility	City	Built	Renovated	Meeting SF
1	Best Western Holiday Lodge	Clear Lake	1964	2017	6,000
2	Suburban Studios- Fort Dodge	Fort Dodge	2023	—	5,772
3	Cardiff Center at Fort Frenzy	Fort Dodge	2019	—	7,000
4	Grand Falls Casino Resort	Larchwood	2011	—	12,000
5	North Iowa Events Center	Mason City	1955	2025	68,000
6	The Historic Park Inn Hotel	Mason City	1910	2011	8,170
7	GrandStay Rock Valley	Rock Valley	2019	—	8,500
8	Courtyard Sioux City Downtown	Sioux City	2019	2020	1,400
9	Hilton Garden Inn Sioux City Riverfront	Sioux City	2008	2020	8,500
10	Sioux City Convention Center	Sioux City	1988	2019	42,572
11	Stoney Creek Hotel & Conference Center - Sioux City	Sioux City	2009	—	12,520
12	The Warrior Hotel, Autograph Collection	Sioux City	1930	2020	8,423
13	Clay County Regional Events Center	Spencer	2003	—	35,380
14	King's Pointe Resort	Storm Lake	2007	—	3,000

ton. These visitors reflect Midwestern values and a family-oriented lifestyle, often residing in owner-occupied homes in stable, middle-class neighborhoods. The median age spans a wide range—from young professionals and families to retired couples—with household incomes typically between $60K and $100K.

Education levels are moderate to high, and many are employed in healthcare, education, agriculture, or local business. Their interests include home improvement, fishing, sporting events, and road trips. This group blends digital and traditional media habits—Facebook, YouTube, local TV, and radio are common. They value convenience and comfort over flash, and brand loyalty is strong.

Their travel behavior includes short-haul regional trips in their own vehicles, preferring clean and affordable hotels, cabins, or lakeside rentals. They're drawn to water, fresh air, and active recreation—boating, biking, fishing, and community events. In Iowa's Lakes & Land region, they feel right at home enjoying the same things they do back home: scenic views, small-town friendliness, and a pace that balances exploration with relaxation.

Loess Hills & Beyond

This tourism area's quality of visitor experience as rated by planners was lower than average for agritourism, air service, events & festivals, ground transportation, and retail & shopping. Suppliers identified accommodation, arts, and culture & history, events & festivals as their strongest attributes, and considered many of the other attributes below the average rating across all tourism areas.

In terms of the reasons meetings are booked at a particular facility, planners of events in this area tend to consider availability as a stronger factor than it is considered in other tourism areas. Suppliers in this area place less importance on accessibility and proximity to other things for attendees to do than other tourism areas.

Of the 99 facilities inventoried, 9 are located in Loess Hills & Beyond. The average google rating was 4.08/5, lower than the average across all tourism areas: 4.25/5. On average, facilities were originally constructed in 1999—the newest average age in all tourism areas—with the average year of renovation of 2014. For those facilities with an attached hotel, the hotel has on average 172 rooms. Facilities averaged 38,952 square feet across 5.9 rooms. The average exhibit space was 12,000 s.f., below the average across all facilities inventoried. More details on this inventory can be found in the appendix.

Loess Hills & Beyond Meeting & Convention Attendees

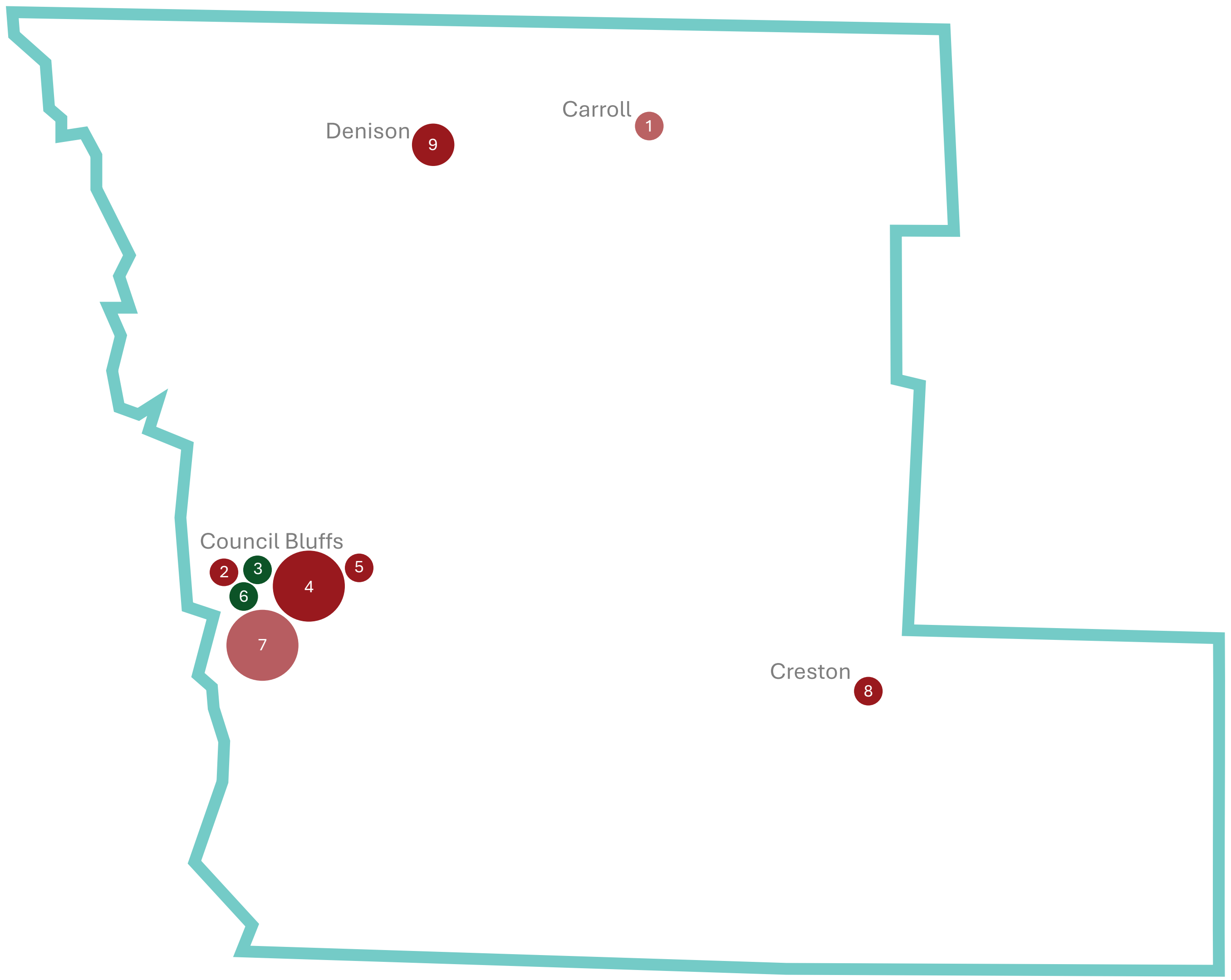
Frequent meeting & convention attendees in Loess Hills & Beyond can be described as Heartland Suburbanites. A brief overview of this visitor profile is below; a full demographic and psychographic profile is included in the appendix on page 95.

Heartland Suburbanites

The Heartland Suburbanites originate from a tight geographic cluster within the Omaha, NE metro—places like Papillion, Millard, and North Omaha. These visitors are predominantly middle-income families and professionals living in well-established suburban neighborhoods. Many are homeowners with children or are empty nesters enjoying stability and familiarity. They represent a blend of working-class values and moderate affluence, with household incomes generally ranging from $60K to $110K.

Education levels are moderate—many have some college or a bachelor's degree—and they work across healthcare, logistics, education, and small business sectors. Their lives are rooted in routines that prioritize family, faith, and community, and they prefer destinations that are clean, easy to navigate, and offer wholesome recreation.

LOESS HILLS & BEYOND AREA MAP



LOESS HILLS & BEYOND AREA MEETING FACILITIES

No.	Facility	City	Built	Renovated	Meeting SF
1	Carrollton Inn	Carroll	1978	2015	5,000
2	Ameristar Casino Hotel Council Bluffs	Council Bluffs	1996	—	8,000
3	Hampton Inn Council Bluffs	Council Bluffs	2000	2020	6,042
4	Harrah's Council Bluffs	Council Bluffs	1996	2002	156,299
5	Hilton Garden Inn Omaha East/Council Bluffs	Council Bluffs	2009	2009	4,696
6	Holiday Inn & Suites Council Bluffs I-29	Council Bluffs	1997	2022	6,030
7	Mid-America Center	Council Bluffs	2002	2015	148,790
8	Supertel Inn & Conference Center	Creston	2006	—	3,265
9	Boulders Conference Center	Denison	2006	—	12,446

Their media use spans both traditional and digital—Facebook is ubiquitous, local TV is trusted, and YouTube is increasingly popular. They shop at major chains, value consistency, and lean toward practical spending. When visiting the Loess Hills or nearby Iowa destinations, they enjoy scenic drives, museums, wineries, community festivals, and quiet natural spaces. They're the kind of travelers who appreciate good signage, parking, and a friendly local welcome.

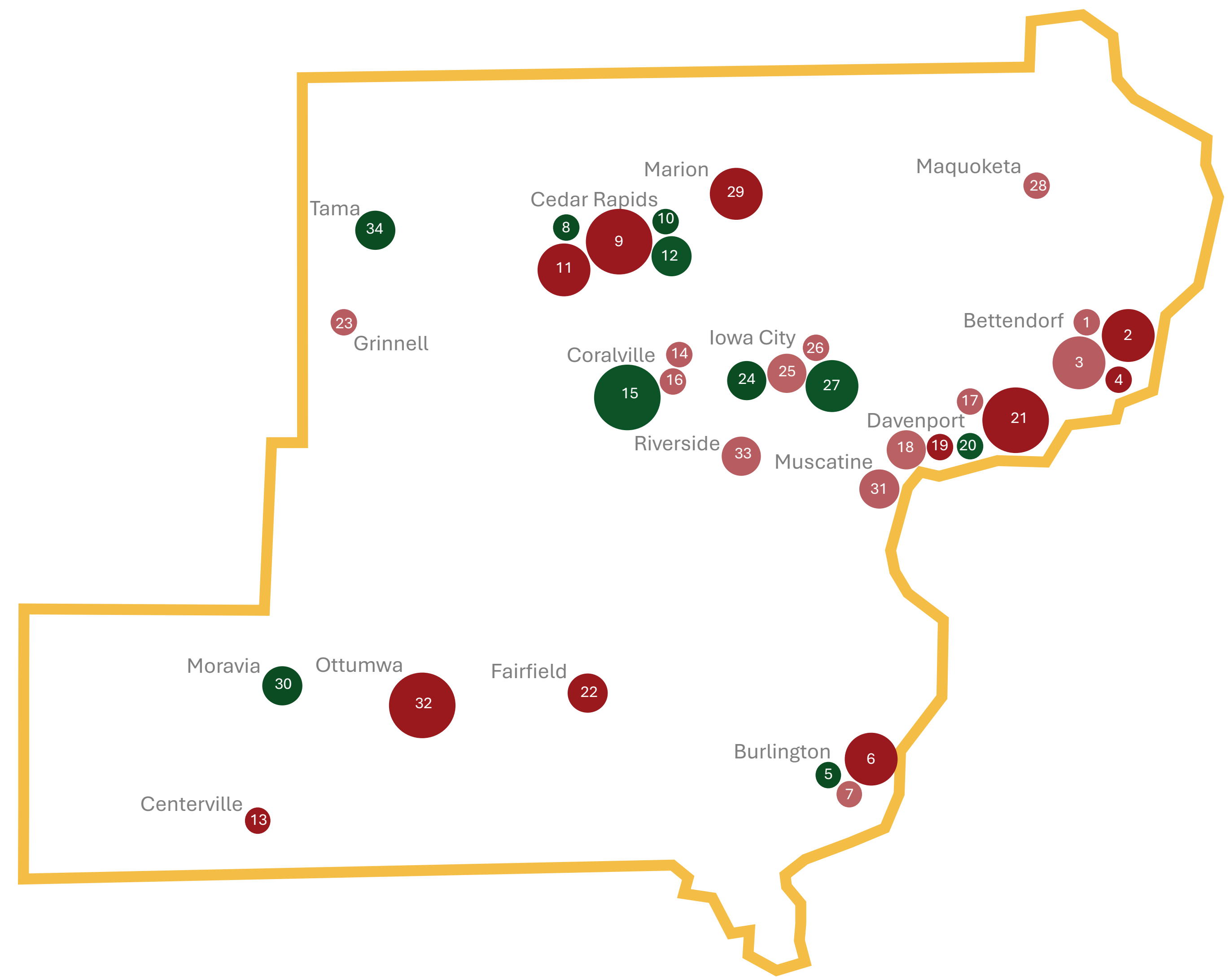
Storied & Scenic

This tourism area's quality of visitor experience as rated by planners is average across all attributes and tourism areas, with individual attribute ranking sometimes above or below averages. Suppliers rated this area at or above average across all attributes and tourism areas.

In terms of the reasons meetings are booked at a particular facility, the only ranking that stands out is how planners of events in this area consider accessibility more important than planners in other tourism areas.

Of the 99 facilities inventoried, 33 are located in Storied & Scenic. The average google rating was 4.22/5, slightly lower than the average across all tourism areas: 4.25/5. On average, facilities were originally constructed in 1991 with the average year of renovation of 2015. For those facilities with an attached hotel, the hotel has on average

STORIED & SCENIC AREA MAP



STORIED & SCENIC AREA MEETING FACILITIES

No.	Facility	City	Built	Renovated	Meeting SF
1	Hilton Garden Inn Bettendorf/Quad Cities	Bettendorf	2015	2015	3,000
2	Isle Casino Hotel Bettendorf	Bettendorf	1995	2007	40,000
3	Isle Hotel & Waterfront Convention Center	Bettendorf	2009	2016	40,000
4	Ramada by Wyndham Bettendorf	Bettendorf	1989	2006	5,915
5	Burlington Memorial Auditorium	Burlington	1939	2020	2,310
6	Catfish Bend Conference & Event Center	Burlington	2007	2008	30,000
7	Comfort Suites Burlington	Burlington	2005	2017	9,315
8	Best Western Plus Longbranch Hotel & Convention Center	Cedar Rapids	1979	2022	3,711
9	DoubleTree by Hilton Hotel Cedar Rapids Convention Complex	Cedar Rapids	2013	2013	80,000
10	Hilton Garden Inn Cedar Rapids	Cedar Rapids	2021	—	3,800
11	Radisson Hotel Cedar Rapids	Cedar Rapids	1988	2007	25,923
12	The Hotel at Kirkwood Center	Cedar Rapids	2010	2020	17,361
13	The Continental	Centerville	1893	1997	2,268
14	Drury Inn & Suites Iowa City Coralville	Coralville	2019	2019	4,971
15	Hyatt Regency Coralville Hotel & Conference Center	Coralville	2006	2023	81,088
16	Radisson Hotel & Conference Center Coralville - Iowa City	Coralville	1977	2016	7,000
17	Best Western Plus Steeplegate Inn	Davenport	1985	2015	8,200
18	DoubleTree by Hilton Davenport	Davenport	1995	2019	17,678
19	Holiday Inn Hotel & Suites Davenport	Davenport	2014	—	3,000
20	Hotel Blackhawk, Autograph Collection	Davenport	1915	2024	8,911
21	The RiverCenter	Davenport	1982	1993	86,151
22	Fairfield Arts & Convention Center	Fairfield	2007	—	11,000
23	Hotel Grinnell, Ascend Hotel Collection	Grinnell	1921	2016	9,000
24	Courtyard Iowa City University Heights	Iowa City	2021	—	13,310
25	Graduate by Hilton Iowa City	Iowa City	1984	2018	10,455
26	Hilton Garden Inn Iowa City Downtown University	Iowa City	2017	—	3,000
27	The Highlander Hotel	Iowa City	1967	2023	21,000
28	AmericInn by Wyndham Maquoketa	Maquoketa	2003	2019	8,100
29	Sleep Inn Marion	Marion	1999	2009	24,752
30	Honey Creek Resort State Park	Moravia	2008	2024	11,755
31	The Merrill Hotel, Muscatine, a Tribute Portfolio Hotel	Muscatine	2018	—	12,000
32	Bridge View Center	Ottumwa	2007	—	56,233
33	Riverside Casino & Golf Resort	Riverside	2007	2018	12,000
34	Meskwaki Bingo Casino Hotel	Tama	1992	2025	14,000

STORIED & SCENIC AREA MEETING FACILITIES, CONTINUED

176 rooms. Facilities averaged 20,212 square feet across 7.4 rooms. The average exhibit space was 12,957 square feet, below the average across all facilities inventoried. More details on this inventory can be found in the appendix.

Storied & Scenic Meeting & Convention Attendees

Frequent meeting & convention attendees in Storied & Scenic fall into two main groups: Midwestern Core Travelers and Out-of-Region Niche Visitors. A brief overview of each is below; full demographic and psychographic profiles are included in the appendix on page 97.

Midwestern Core Travelers

These visitors come from the heart of the Quad Cities region and surrounding Illinois small metros. They're regional travelers—loyal, cost-conscious, and attuned to Midwestern culture and hospitality. Most are middle-aged adults with stable careers in education, manufacturing, healthcare, or logistics. They live in modest neighborhoods, often owning single-family homes, and are deeply rooted in family and community. Household incomes typically range from $50K to $90K, and educational attainment is moderate.

They enjoy the familiar: fishing, grilling, car shows, and seasonal festivals. While not especially trend-driven, they value places that feel welcoming and well-organized. They rely on local TV, Facebook, and radio for news and entertainment. Their travel preferences lean toward regional road trips—visiting friends, exploring historical towns, or attending local events. Storied & Scenic destinations resonate with them because they offer exactly what they're looking for: affordability, friendliness, and a connection to heritage.

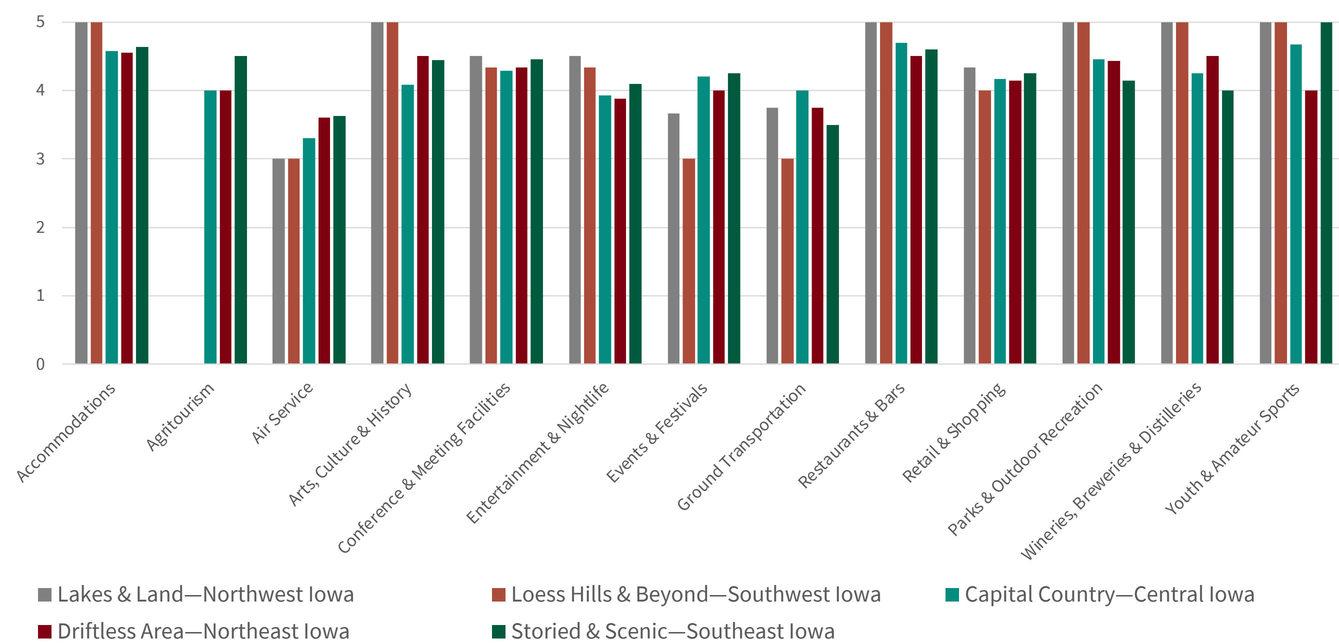
Out-of-Region Niche Visitors

These travelers hail from diverse parts of the country—urban and suburban ZIPs in Virginia, North Carolina, Utah, Michigan, and more. They are educated, affluent, and curious—often professionals or retirees with disposable income and a taste for off-the-beaten-path experiences. They are drawn to the Storied & Scenic region for its Americana charm, regional history, and riverfront ambiance.

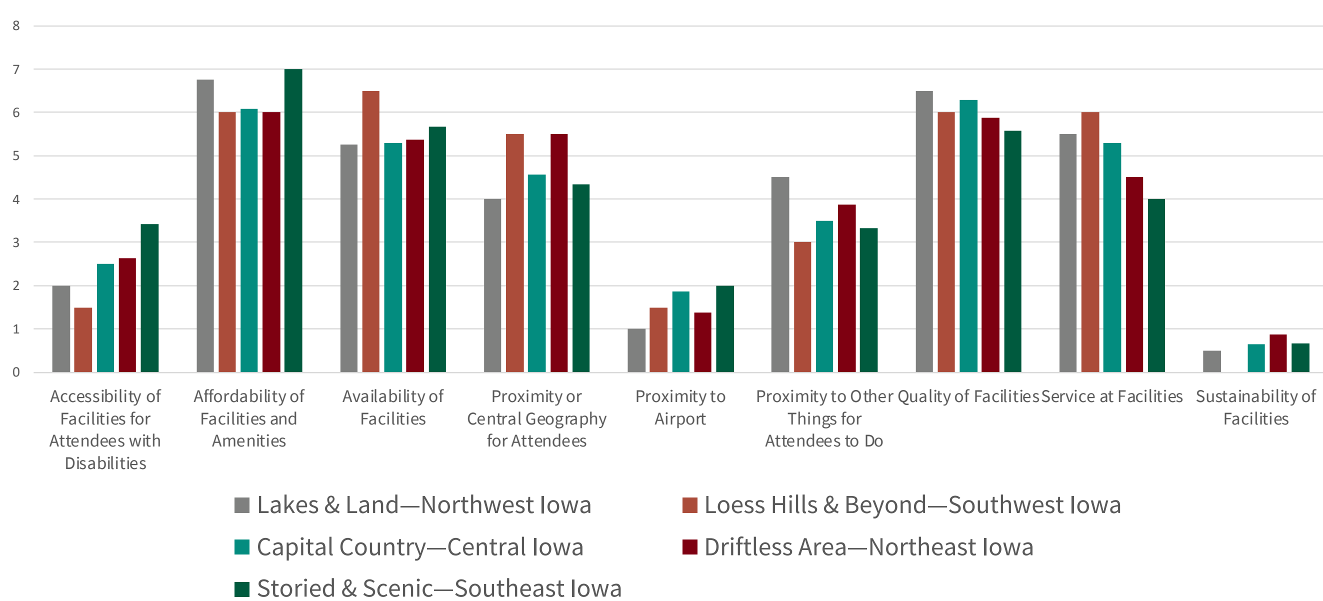
This group represents lifestyle segments such as "Savvy Suburbanites" and "Golden Years." They are tech-literate, socially active, and interested in cultural enrichment, outdoor activities, and boutique travel. They consume media digitally—streaming news, podcasts, and curated social content—and plan travel through TripAdvisor, travel blogs, and social recommendations.

They often fly or drive long distances, staying in boutique hotels or upscale inns. In Iowa, they're intrigued by the unexpected: riverboat history, Scandinavian heritage, farm-to-table food, and quaint towns. They are less frequent but higher-spending visitors who help elevate the region's visibility beyond its core drive markets.

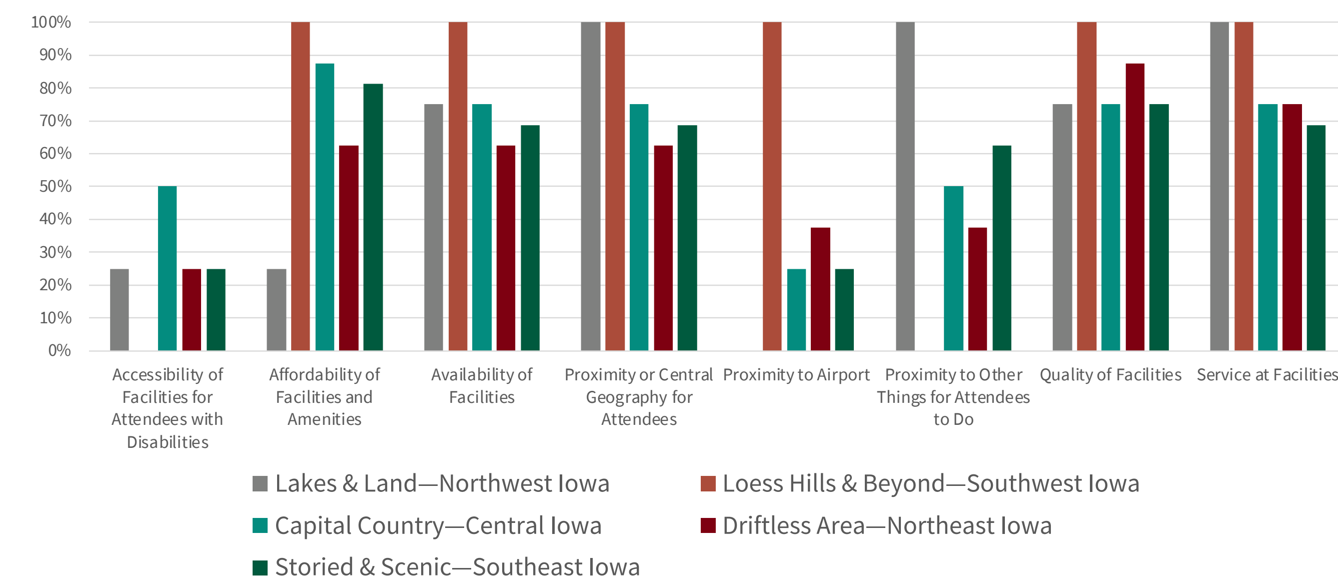
MEETING PLANNERS: QUALITY OF VISITOR EXPERIENCE BY TOURISM AREA



WHEN BOOKING A MEETING VENUE PLEASE RANK THE IMPORTANCE OF THE FOLLOWING FROM MOST IMPORTANT TO LEAST IMPORTANT: BY TOURISM AREA



TOP REASONS THAT MEETINGS ARE BOOKED AT YOUR FACILITY OR FACILITIES: BY TOURISM AREA



STATEWIDE RECOMMENDATIONS

STATEWIDE RECOMMENDATIONS

Recommendations to make Iowa more competitive in attracting meetings & conventions can be organized into four categories:

1. **Destination Development:** These recommendations focus on physical infrastructure, assets, and access upgrades that will make Iowa more competitive.
2. **Marketing and Messaging:** These recommendations focus on how to talk about Iowa and what to consider regarding messages that resonate with future visitors.
3. **Collaboration and Relationships:** These focus on the many roles DMOs take on to bring meetings & conventions to Iowa.
4. **Advocacy and Education:** These recommendations address the macro-climate in which meetings and conventions exist, and potential advocacy positions.

Destination Development Recommendations

1 Invest in facilities

The actual physical space of meeting and convention space and a convention hotel can be enhanced to make Iowa more competitive.

Some of the most oft-cited facility attributes that make a place more attractive include more light and modernized facilities. Similarly, some respondents shared that having larger space under one roof was needed. This was in regard to exhibition space, meeting space, and ensuring all facilities are in the same building, which is especially important for attracting meetings & conventions to Iowa in its slower winter season. Last, facilities that have an attached hotel with a larger number of hotel rooms are an investment to make Iowa more attractive for meetings & conventions.

"We have decided to go to places other than Iowa because those states have larger properties and hotel spaces." —Meeting Planner

> **"Convention spaces beyond Iowa are bright and welcoming. We don't have that here as much. We don't have anything modern and contemporary. It limits our success in bringing in larger groups." —Meeting Planner**

"What we find attractive about the meetings & conventions space in the city in particular: they have huge ballrooms, no pillars, and natural daylight." —Meeting Planner

"We are expected to punch up and compete with other cities in the region like Madison and Milwaukee Wisconsin. We need a bigger headquarter hotel for that. We need more flat space and hotels connected to the convention center." —Supplier

"There was momentum before Covid to uplevel tech, and it is still going on." —Supplier

"If our state wants us to compete with larger convention spaces, we need to be infrastructure ready. Our convention center is having some wear and tear. Can the state help us improve our convention centers to help keep us competitive?" —Supplier

2 Grow airlift

The most commonly cited limitation for meeting & convention facilities in Iowa, and the reason many leads opted for other locations, is airlift. While Des Moines has dozens of flights a day, is centrally located in the state, and is in the process of increasing its capacity, other airports do not have similarly robust connections. While airlift is an incredibly involved investment, focusing on long-term improvements that grow airlift will make facilities throughout the state more attractive.

"We chose to have our conference outside of Iowa in 2024 and 2025. Other places offered us the best mix of excellent facilities and lodging at our kind of prices, airlift, and a vibrant downtown scene." —Meeting Planner

> **"If a new terminal was not in the plans, I would have had pushback on coming back after this year." —Meeting Planner**

"Omaha, Nebraska is adding 41 breakout rooms in the next couple of years and expanding their airport." —Supplier

"FAM tours are helpful because we can help consultants and planners know there are fairly efficient ways to get to our convention center from the airport, and we can help manage the expectation that people will not all arrive on nonstops flights." —Supplier

"Other states have deeper pockets to go towards air service to attract and retain service. They have different incentive programs. There is limited funding for Iowa's incentive programs." —Supplier

"Ease of access is a major variable…[proximity] to an airport is important." —Meeting Planner

3 Develop engaging convention center-adjacent places

In addition to the meeting & convention space, the area surrounding the facility plays a role in making a destination competitive. Meeting planners look for walkability, mixed uses and locally-owned restaurants in the vicinity of their event. To the degree development can integrate these, a destination will increase its attractiveness. Similarly, the destination will want to ensure it can offer unique, authentic experiences for evening events for attendees. All these location recommendations point to collaboration with the local government and land developers to create an environment in which meetings & conventions will thrive.

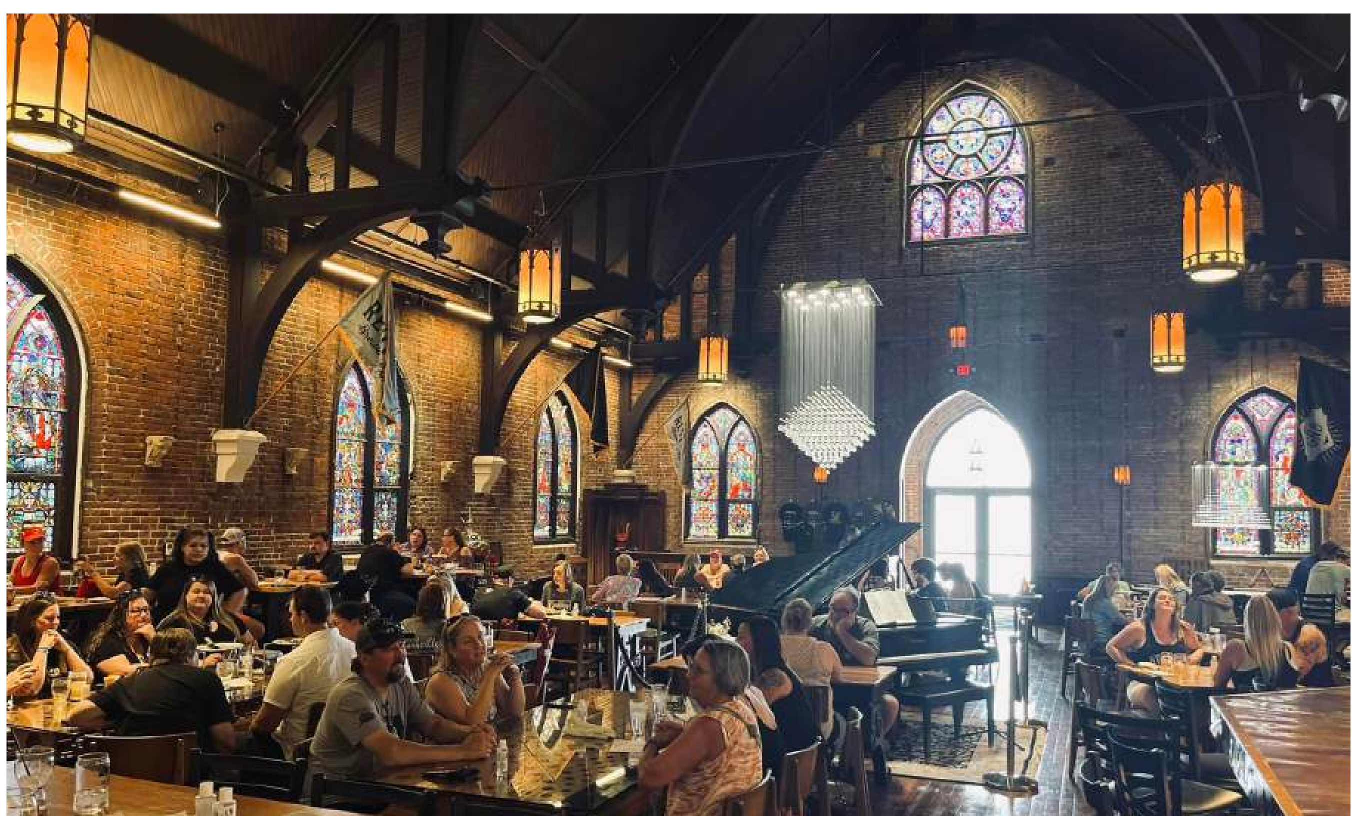
"The accessibility to restaurants was big for most of our attendees." —Meeting Planner

"We don't have good places for after-meeting networking activities. We need more of those outside the meeting space." —Meeting Planner

> **"Sometimes Iowa's convention centers and hotels with meeting spaces can be on the outskirts of town near an interstate. We have to make a conscious effort with mobile tours and evening events to get into the downtown area." —Meeting Planner**

"A place where our competitor Milwaukee, Wisconsin wins is in the brand new entertainment district. We are talking about that, but don't have one yet." —Supplier

"While the hotel was built nearly two decades ago, there is a new walkable development in town. It is a growing area with restaurants, a brewery, boutique shopping, and nice walkable areas for conference attendees. Young professionals are moving there." —Supplier



Marketing and Messaging Recommendations

1 Tell a compelling story of Iowa's facilities

Repeatedly, surveys and interviewees shared that people have a preconceived notion of Iowa as a fly-over state full of corn and soybeans, and not worth visiting. While the rural areas of Iowa do indeed have corn and soybeans, the cities with meeting & convention facilities are dynamic. Focusing on sharing the story of Iowa's facilities, new investments, urban centers, and options for evening activities will help create a distinct idea of what Iowa is about and what it has to offer.

"I've been on FAMs when people come here for the first time and they are blown away. If we can get someone here to see what it is like, they are so intrigued." —Supplier

"People don't have the context of Iowa…People have to come here and have a site tour to see how their program could work here. FAMs are important to having people think of Iowa as a viable option." —Supplier

"The DMO has been doing a good job of pointing out what things are here that are really cool. We have sports, museums, sculpture parks, craft breweries." —Meeting Planner

> **"We compete against some tier 1 and 2 cities. While we have the facilities to compete, people don't have the awareness and know where we are. If we can get people here for a site inspection or FAM tour, then we have a good chance on a lead." —Supplier**

"As planners, help us with the promotion of Iowa with marketing content, etc. What's unique to Iowa that would create immersive experiences for attendees that they can't get anywhere else?" —Meeting Planner

2 Play to your destination's strengths

There are a number of attributes that make Iowa competitive for meetings & conventions: overall affordability, highway accessibility, and central regional and national location. Additionally, some interviewees and survey respondents share that the ease of driving from an airport to a town center where a convention center may be located was also a selling point.

"You can get anywhere in [our city] in 15 minutes. This is a big deal." —Meeting Planner

"I won't choose a location that is 45 minutes or greater from the airport. Traffic is a big concern." —Meeting Planner

"Our community has great midwest hospitality. It is not a huge city. Places are easy to get to. We have a positive, growing, and bright downtown atmosphere. I never worry about my team's safety." —Meeting Planner

> **"We are affordable and have good driveability. We are right in the middle of a wheel of drivable cities throughout the midwest." —Supplier**

"Major variables for us are cost and ease of access." —Meeting Planner

3 Welcome plus-ones

Many convention attendees bring their partner, spouse and/or family to an event, especially if they are considering extending a business trip into leisure time. Prior to an event, meeting & convention planners can share outings and offerings for the plus-ones to engage in while in the community.

"People want cool things for their families to do while they are occupied. We need to showcase what the family can do, and also what the cool networking events are. We can showcase the whole community for the attendees and their family." —Supplier

"I feel really good about what we offer for evenings, weekends, and families. We have great stuff like a science center, museum, and shopping. We have great itineraries for off site activities." —Supplier

> **"With a group coming in May, we are making recommendations for the spouses. We curate unique experiences and reach out to those providers." —Meeting Planner**

"We have spouses come with conference attendees, but not as many kids with mid-week conferences. We can create places people want to come to with their family, like a Meow Wolf." —Meeting Planner

Collaboration and Relationships Recommendations

1 Continue being "Iowa Nice"

DMOs leverage the "Iowa Nice" reputation when they seek to bring events to the state. Survey and interview respondents overwhelmingly talked about how DMOs and community front-line staff create a warm welcome. Similarly, many stated that Iowa makes mid-sized meetings & conventions feel extra special in a way that they don't get from larger regional destinations like Chicago, IL. Iowa nice also means continuing the positive relationships with cities, local partners, and the state to offer an Iowa welcome to meeting and convention attendees.

A recent Northstar Meetings Group + Cvent survey shows that 23% of meeting planners nationwide are increasingly committed to implementing inclusive practices as compared to one year ago. To compare, 11% are less committed. While interest in inclusivity grows within the meetings market, there will be additional lost opportunities as planners find what they are seeking elsewhere. These losses ultimately hit the state's overall economic health, prosperity, and quality of life.

"The convention center team is phenomenal. They have great attention to detail and customer service. They look out for me, have my interests at heart, and it doesn't feel like an upsell. They don't say no, they come to a solution—'If it were possible, what would it take?'" —Meeting Planner

> **"The best teams are those where the first words out of a staff mouth is 'yes' and how to get there. They are solution oriented." —Meeting Planner**

"The way our community works together is our secret sauce." —Supplier

"Our job is to enhance the experience. If we do that, then we have a better brand experience. Having team members working in these facilities that have innovative ideas is important." —Supplier

"It is Midwest hospitality. A lot of people don't realize that other parts of the country just don't have that kind of hospitality." —Meeting Planner

"The staff at [the DMO] are amazing. The ability of the DMO, in conjunction with the facility, is great. They meet all our needs and are so easy to coordinate with because of how the staff approaches their work." —Meeting Planner

"Good DMO and venue directors can really make or break a place and have people return. Have the right people in those places. And have an enthusiastic local staff and committee." —Meeting Planner

2 Support trade show presence

It is challenging for a single individual attending a trade show to have in-depth knowledge of every destination and facility in Iowa. While ITO and iTIP do a good job representing Iowa, local DMOs are keen to participate in trade shows and be able to share directly about their destination. Doing this effectively requires supporting coordination between DMOs and supporting smaller DMOs in being able to afford attending.

"There are about 10 of us larger DMOs. We are looking to go to iMEX together to make an impact as a state versus being on our own." —Supplier

"There is a group that talks about what trade shows we should go to. Can this be more formalized so we have a dedicated group? We need to elevate the importance of meetings and conventions." —Supplier

"It would be good to clarify the roles and responsibilities of iTIP and cities when going to trade shows, and to figure out the financial commitment to make it equitable. There can be a better way to coordinate with iTIP on these." —Supplier

> **"As a travel professional I travel to conferences like IMEX, PCMA and others and never see Iowa with a presence. If we're looking to bring more meetings to the state then I would recommend Iowa look at being at some of these larger events." —Supplier**

3 Continue to focus on inter-agency relationship building

iTIP is still a relatively new organization in the Iowa tourism industry. While some interview and survey respondents were affirming of what iTIP is doing, some shared that they are still figuring it out. Growing the awareness and support of iTIP will support it and its efforts to bring more meetings & conventions to Iowa.

"I think the ecosystem functions well. There are areas that could be better. The formation of iTIP was smart and Chelsea has been great. We're still kind of healing over this fracture. We were coming out of a system that didn't seem to really work well for us." —Supplier

"My relationship with iTIP is really healthy. I get to travel with them and pick their brain. Everyone has been welcoming." —Supplier

> **"We have good partnerships between cities for bigger events. It is important to partner to bring in bigger events, and to keep events in the state." —Supplier**

"It would be a win for Iowa if iTIP or other organizations can help get local corporations to start hosting their own conferences locally." —Supplier

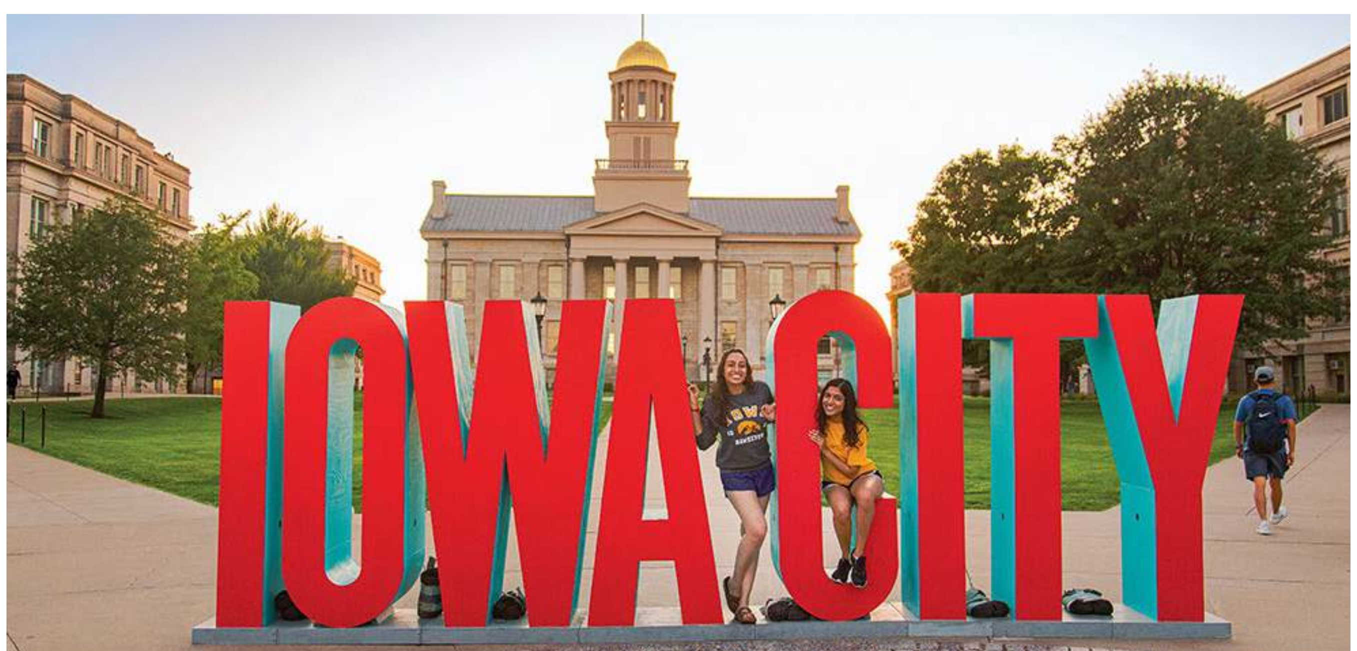
"We are all figuring out how to work with iTIP since it is a relatively new organization." —Supplier

"We used to have separate organizations. That we tried to bring everyone under one umbrella makes a lot of sense, but we have those folks who didn't want to leave the regional system. That is their choice, but they've lost a lot of funding…I just wish we could become more united." —Supplier

Advocacy and Education Recommendations

1 Continue policy advocacy and incentive creation in support of meetings & conventions

While efforts like Destination Iowa have been helpful to grow the state's tourism industry, even more can be done. There are a number of tools that other states and communities have that Iowa has yet to implement. For example, some states have reimbursement funds that may be tapped to provide an extra incentive for an event to come. Iowa also does not have enabling legislation for tourism improvement districts, and some interviewees and survey respondents shared that diversifying the funding base for tourism beyond hotels would be valuable. Taken together, Iowa does not have the tools to compete with many other destinations.



"We don't have enabling legislation at the state for tourism improvement districts. The cities we compete with are doubling their budgets with their TIDs. We don't have that. Unlike other states like Texas, we don't have a tourism special event fund." —Supplier

"We are looking to have alternatives to our reliance on bed tax. We have to see how to spread that out. We affect restaurants and rental cars. How can we broaden that revenue stream, and not have just one funnel?" —Supplier

"Creating other avenues for funding to give DMOs a competitive advantage to bring events here would be helpful. We want to have the enabling legislation to create TIDs." —Meeting Planner

"We have strong support. And also, there is property tax legislation that caps how it can grow in cities. It is capped at 2%, and it limits city level governments. It causes a self-inflicted wound to city budgets." —Supplier

> **"The state puts a lot of money into sports, and they have a huge economic impact. But there is a lack of focus on meetings and conventions. Sports mainly happen on the weekend. Let's focus on the weekday void." —Supplier**

"Can we have state programs to incentivize our ability to invest in ourselves?" —Meeting Planner

"Our ability to offset a convention center rental is the expectation." —Supplier

2 Provide education on the value of tourism, and of meetings & conventions in particular

Meetings & conventions are valuable immediate economic development opportunities as they bring hundreds of people to a community, relying on services, and occupying hotels in the midweek. Further, meetings & conventions are often a person's first exposure to a place, and many choose to visit again at a later date. iTIP, ITO, and DMOs will continue to want to develop and share educational materials with elected officials and policy makers as a way to grow awareness and knowledge on this valuable economic development sector.

"Our state doesn't understand what tourism means for workforce, job creation, and vitality across the board." —Supplier

> **"How do we educate our stakeholders and create funding streams that help make our future vision come to life? We want to build a community where people want to live and do business." —Supplier**

"I don't think we are doing well in telling our elected officials the story of meetings and conventions and what their impact can be." —Supplier

"Most of our funding comes from city hotel motel tax, and we have a great ally with the mayor. Some county leaders are interested in supporting tourism, but not everyone is." —Supplier

"There is always some form of an education gap with local elected officials. In our size community, tourism can be an interesting word." —Supplier

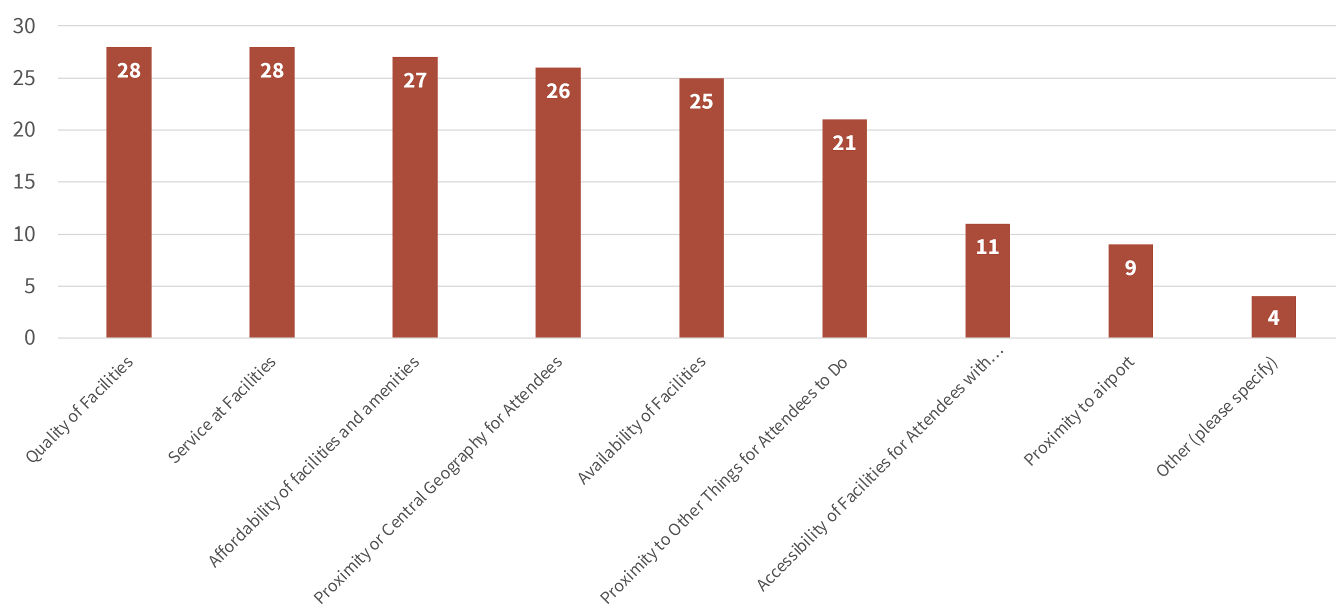
TOURISM AREA OPPORTUNITIES

TOURISM AREA OPPORTUNITIES

The previous section of this report shares statewide strategies that will be useful to increase meetings & convention travel to Iowa. However, within each of Iowa's 5 tourism areas, there are specific avenues of strategic opportunity that present themselves, and this section of the report offers some suggestions as to how each tourism area may work locally to improve its own meetings & convention business.

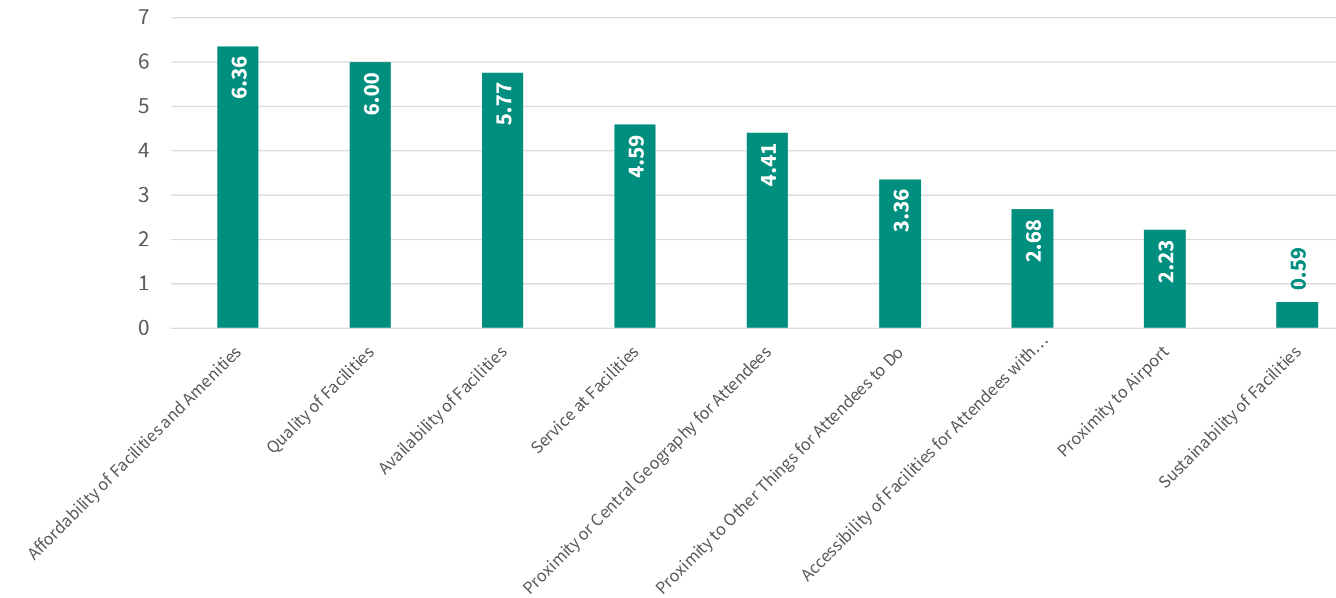
The chart below represents what meetings & convention suppliers believe to be the reasons meetings are booked at their facilities, by region.

TOP REASONS THAT MEETINGS ARE BOOKED AT YOUR FACILITY OR FACILITIES, BY TOURISM AREA (N=35):



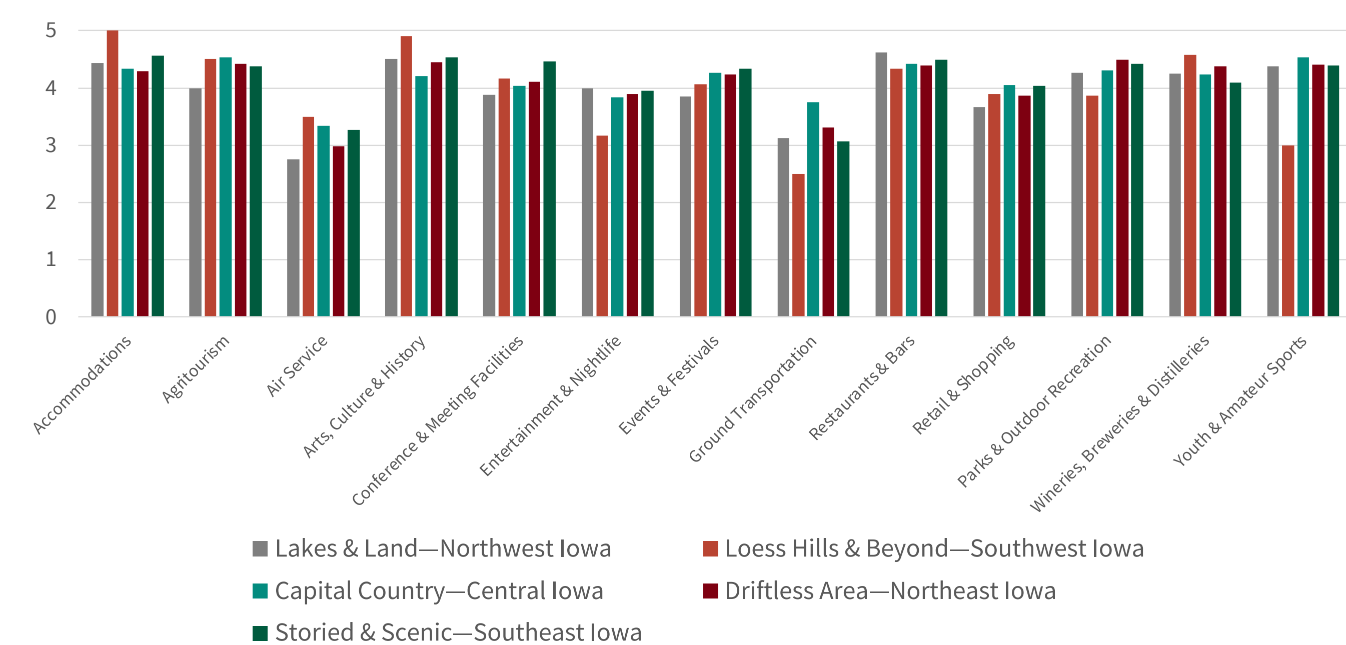
In contrast, the following chart represents how meeting planners ranked the importance of each reason as they choose locations for the meetings they plan.

RANKED REASONS THAT YOU CHOOSE A FACILITY FOR A MEETING YOU ARE PLANNING, BY TOURISM AREA (N=22)



The ratings of visitor experience below come from a combination of the research done for this report and the Group Tour Market Analysis report—representing 99 respondents, we averaged the scores for each facet of the visitor experience by tourism area, allowing us to see individual strengths. For example, Loess Hills & Beyond scores particularly high on Accommodations, Arts/Culture/History, and Wine/Beer/Spirits.

QUALITY OF VISITOR EXPERIENCE BY TOURISM AREA, ALL RESPONDENTS (N=99)



Below, we've provided tourism area-specific recommendations based on the data above, the region-specific visitor profiles we generated, and the conversations we had with interviewees.

Capital Country Opportunities

1 Invest in facilities, especially updating older stock of meeting facilities

With nearly a third of the meeting space stock in the state, and with the most airlift, Capital Country is poised to be an even stronger regional player for meetings and conventions, but planners are looking for facilities that feel fresh and modern, and that have the amenities that today's meetings market expects.

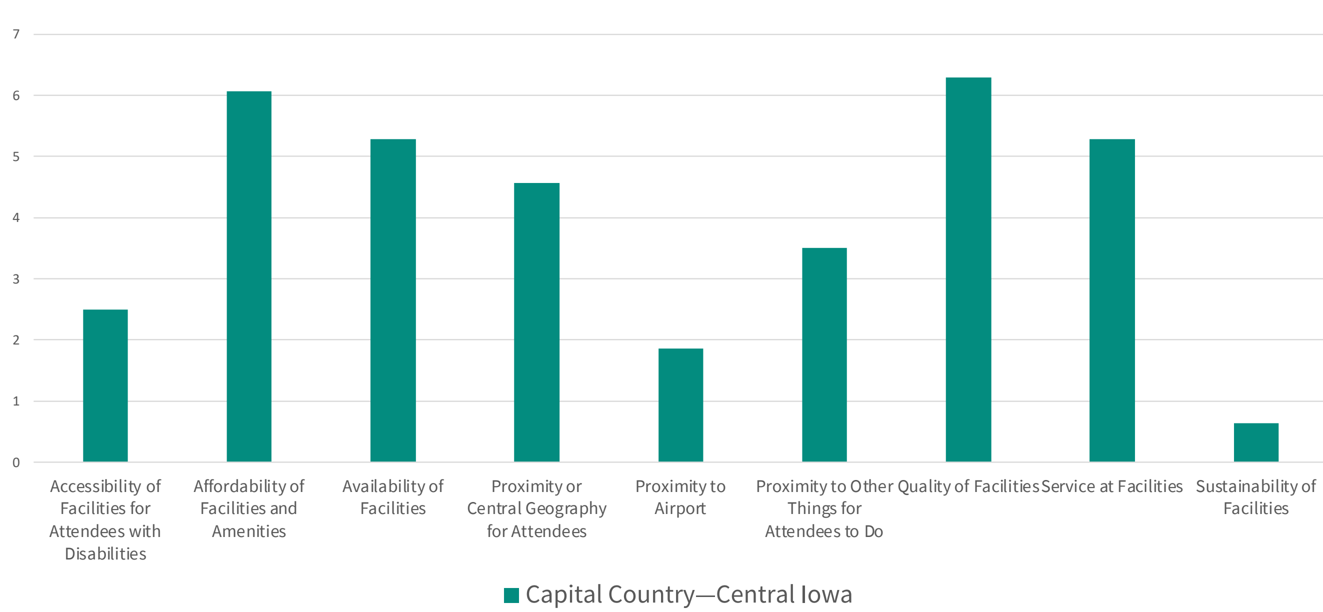
2 Welcome plus-ones, especially among the Urban Adventurer demographic

The Urban Adventurer is a higher-income demographic that skews younger. To the degree that Capital Country can develop and promote things for plus-ones to enjoy while their partners are at meetings or conferences, the economic impact of this market will be increased, both in terms of party spend and length of stay.

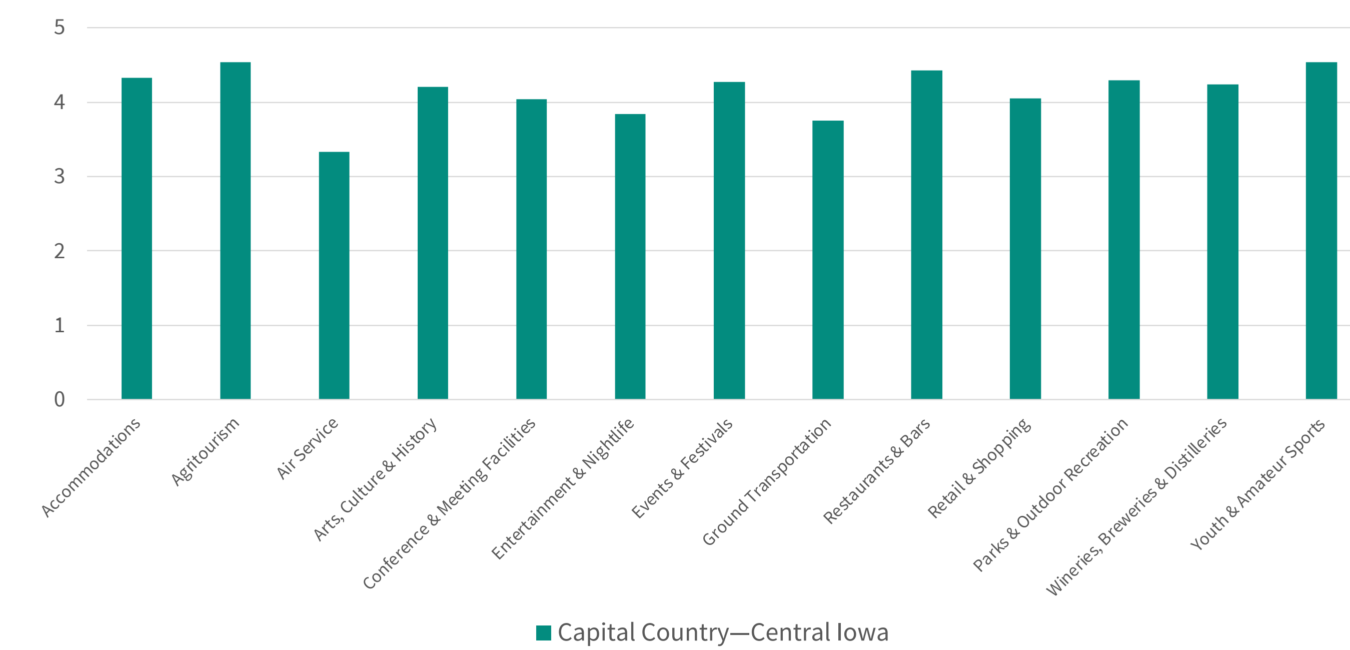
3 Grow and promote airlift

Even though Capital Country leads Iowa in airlift, there is still the opportunity to have an even stronger hand to play in meetings & conventions with connections to more markets and greater frequency to existing markets. The Lift DSM project underway will fulfill much of this need, but promoting this additional capacity to meeting planners will be essential to maintaining a competitive stance.

MEETING PLANNERS—THE IMPORTANCE OF FACTORS WHEN SELECTING A MEETING VENUE (N=19)



VISITOR EXPERIENCE IN CAPITAL COUNTRY, ALL RESPONDENTS (N=50)



Driftless Area Opportunities

1 Invest in facilities, especially older facilities and those in need of renovations

The average construction year of facilities in the Driftless Area is 1982, which likely means that many of these facilities are at or near the end of their lifecycle. Additionally, it's been an average of 12 years since the last renovation for these facilities. Keeping up with meeting planner expectations for meeting facilities will enable a stronger meetings & conventions market in the Driftless Area.

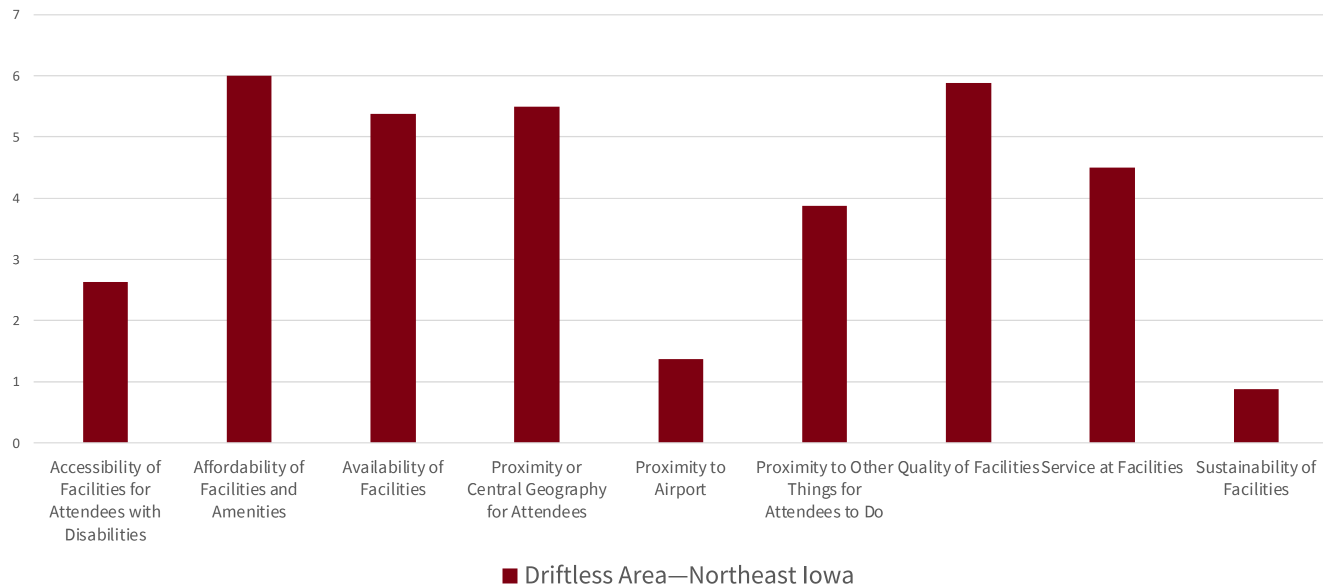
2 Play to your destination's strengths (Eco-Curious Explorers and outdoor recreation)

The Driftless Area rates very highly on outdoor recreation. One of the key demographics we identified for meetings and conventions in this tourism area is the Eco-Curious Explorer, who will be closely aligned to these outdoor amenities. Promoting outdoor assets and activities as part of the sales approach for meetings and conventions can bolster this segment, which could help to extend meetings into "bleisure" stays.

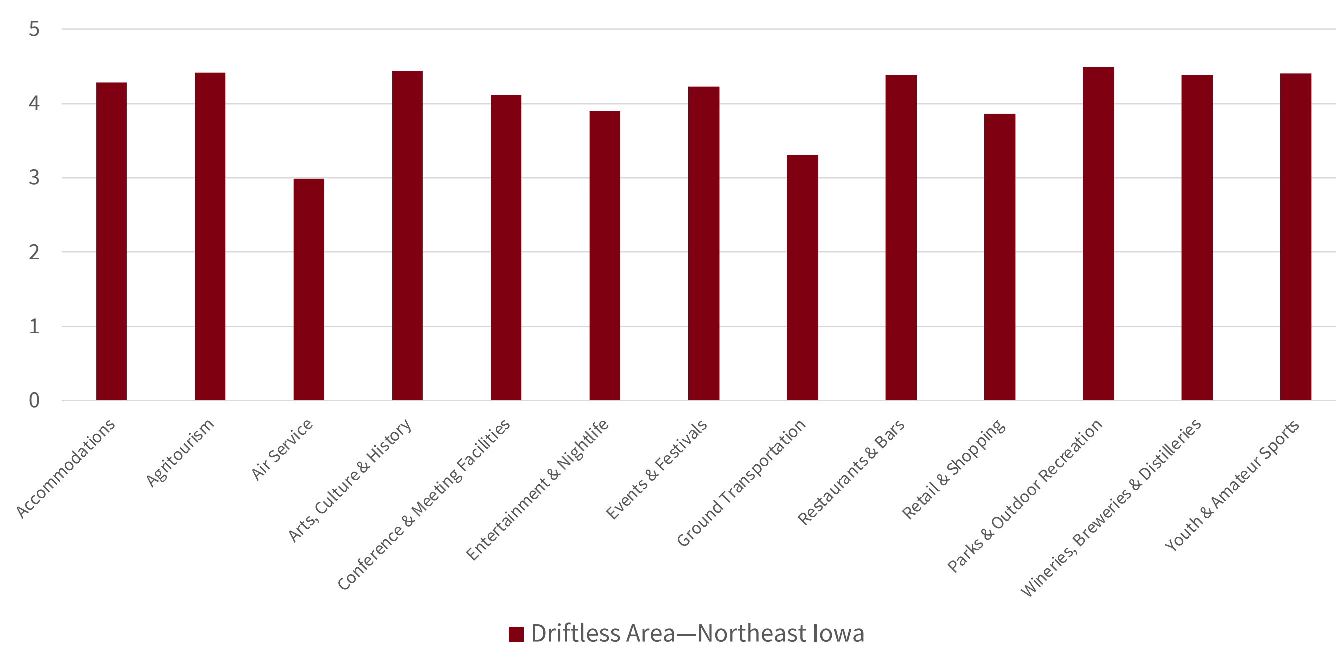
3 Focus on development of experiences adjacent to facilities

Planners look for sites that have lots to do in the immediate vicinity of the meeting facility. A destination development focus on assets such as dining, beverage, nightlife, retail, and arts can help build excitement for the area as a meetings destination.

MEETING PLANNERS—THE IMPORTANCE OF FACTORS WHEN SELECTING A MEETING VENUE (N=10)



VISITOR EXPERIENCE IN DRIFTLESS AREA, ALL RESPONDENTS (N=35)



Lakes & Land Opportunities

1 Play to your strengths in visitor experience

The Lakes & Land visitor experience ranks high across the board and meeting planners operating in this tourism area strongly emphasized the importance of the proximity of other things to do. This strength—especially in food/beverage, arts/culture, and accommodations—can be a distinct advantage for Lakes & Land.

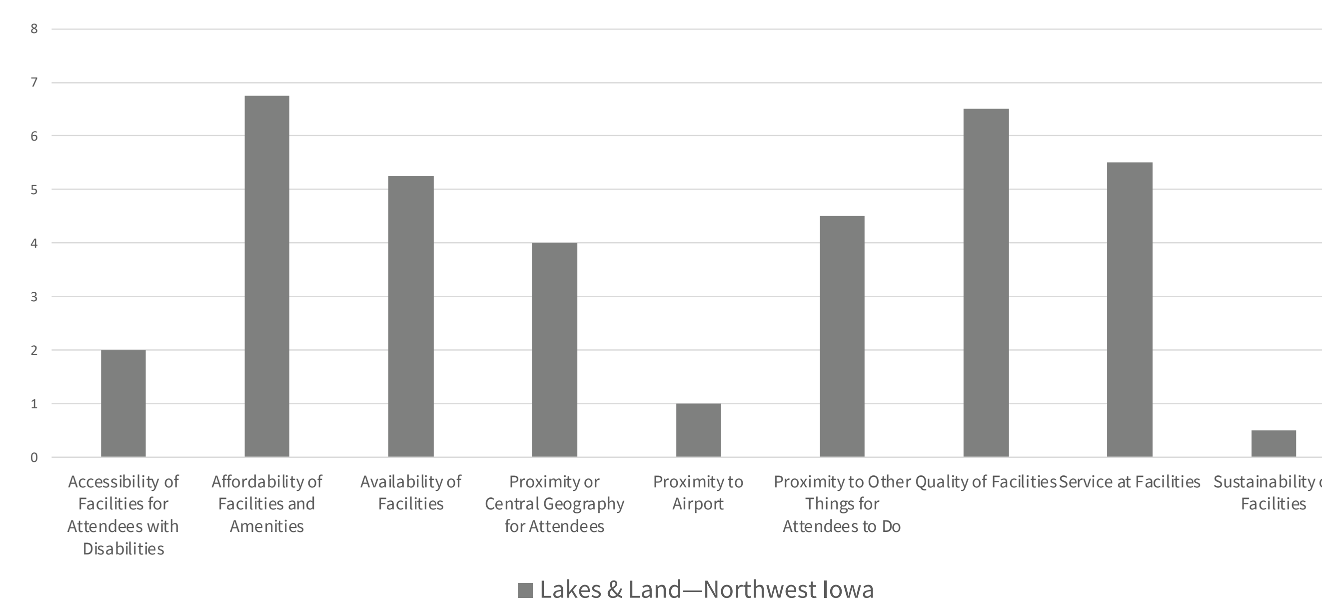
2 Welcome plus-ones

The Comfort Seekers of the Prairie, when visiting Lakes & Land, "feel right at home enjoying the same things they do back home: scenic views, small-town friendliness, and a pace that balances exploration with relaxation." Providing opportunities for the partners or families of meeting attendees to join them in-market and enjoy some additional time will maximize the economic impact of these visitors.

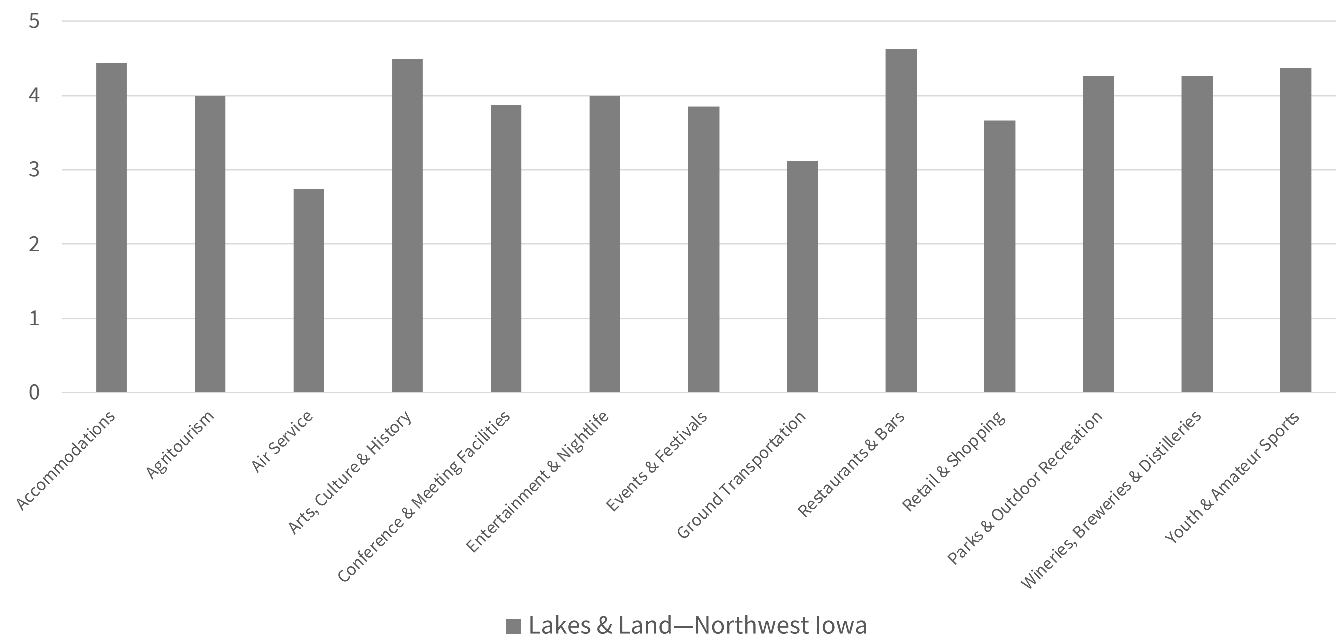
3 Bolster lower-ranking visitor experience facets

Even though the visitor experience in Lakes & Land scores relatively high, gaps in facets such as retail/shopping, if filled, could strengthen this position even further.

MEETING PLANNERS—THE IMPORTANCE OF FACTORS WHEN SELECTING A MEETING VENUE (N=6)



VISITOR EXPERIENCE IN LAKES & LAND, ALL RESPONDENTS (N=24)



Loess Hills & Beyond Opportunities

1 Focus on development of amenities around convention facilities

The Loess Hills & Beyond area scored lower in visitor experience as ranked by planners, yet does score well on arts/culture/history and accommodations within the full complement of respondents to our survey. Further development of amenities proximate to the meeting facilities will make this area more attractive to meeting planners.

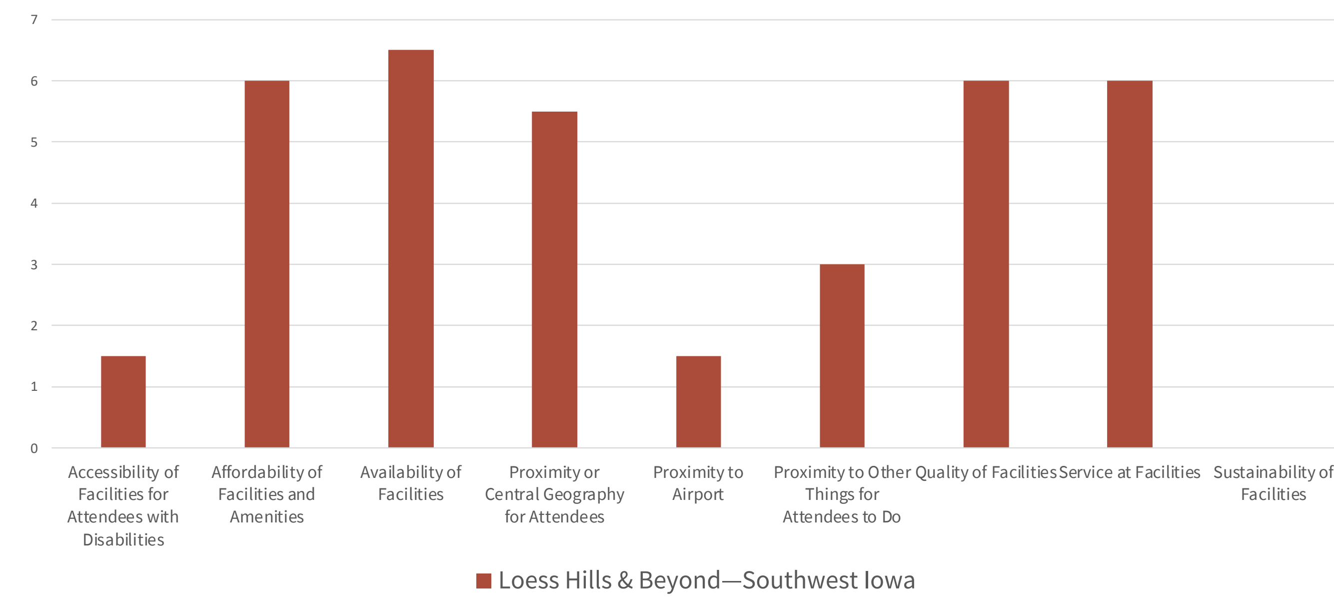
2 Welcome plus-ones (Heartland suburbanites, outdoor activities)

The Heartland Suburbanites demographic (hailing mainly from Omaha, NE and its suburbs) has an affinity for outdoor activities, and Loess Hills & Beyond can deliver on amenities in that category. Encouraging the addition of partners and families to meeting trips in this region could increase impact.

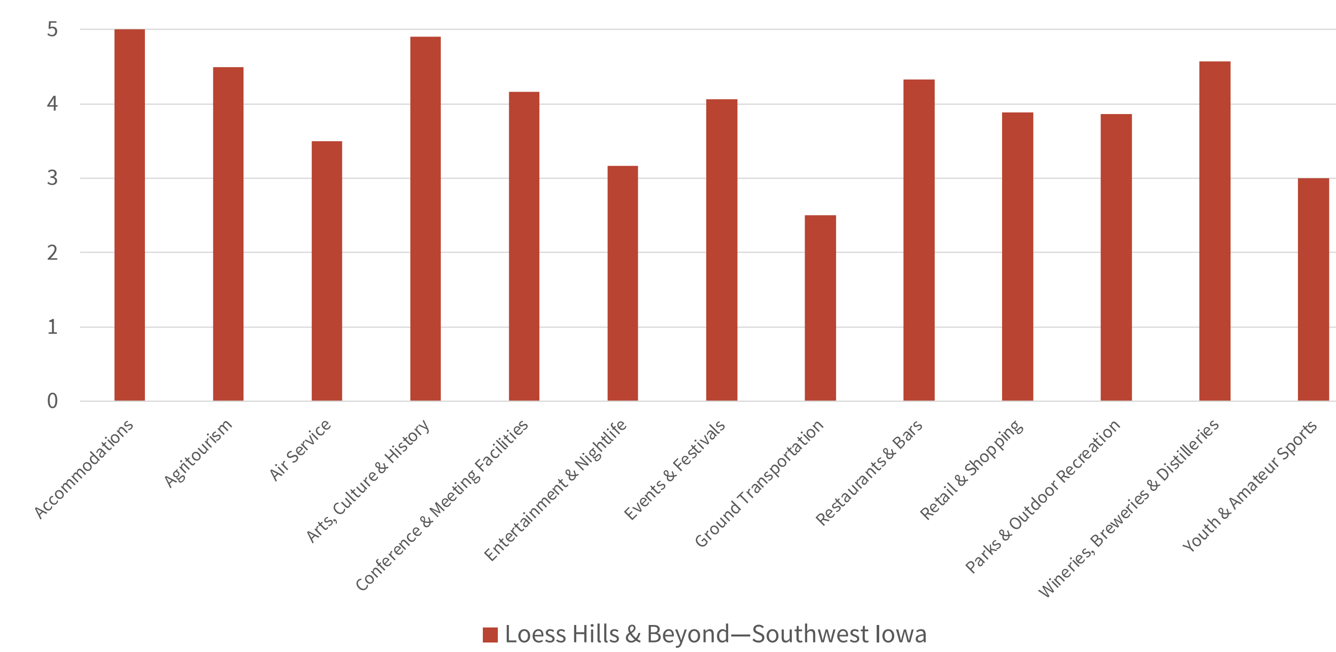
3 Tell a compelling story of Loess Hills & Beyond's facilities (updated meeting space, highly-rated accommodations)

This tourism area has relatively updated meeting space and highly-rated accommodations. Meetings & conventions sales efforts can leverage these comparative advantages for Loess Hills & Beyond, meeting the expectations of today's meeting planners.

MEETING PLANNERS—THE IMPORTANCE OF FACTORS WHEN SELECTING A MEETING VENUE (N=5)



VISITOR EXPERIENCE IN LOESS HILLS & BEYOND, ALL RESPONDENTS (N=13)



Storied & Scenic Opportunities

1 Play to your destination strengths

Storied & Scenic destinations should resonate with the Midwestern Core visitor because this area has what they're looking for: affordability, friendliness, and a connection to heritage. Strong marketing and sales focusing on where this tourism area matches with its common meeting attendees will pay dividends.

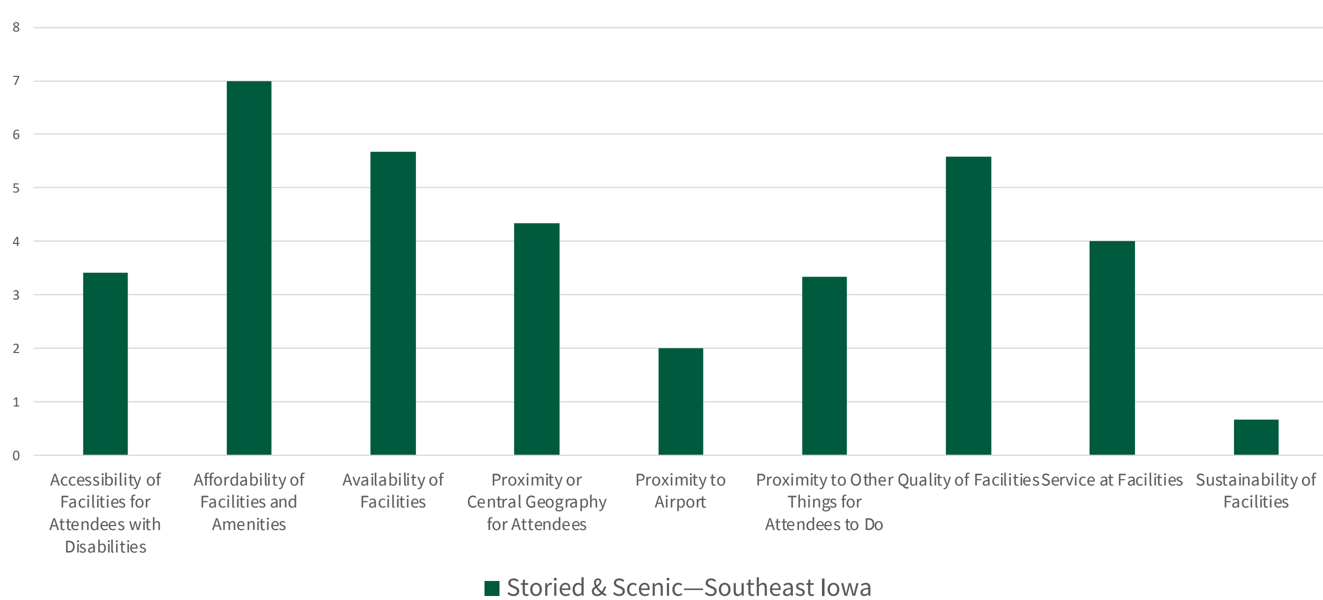
2 Focus on development near meeting facilities

Today's meeting planners are looking for clustered assets and activities near the meeting facilities, as this results in happy meeting-goers and happy clients. A destination development effort centered around bolstering these commercial areas will help elevate Storied & Scenic as a meeting destination.

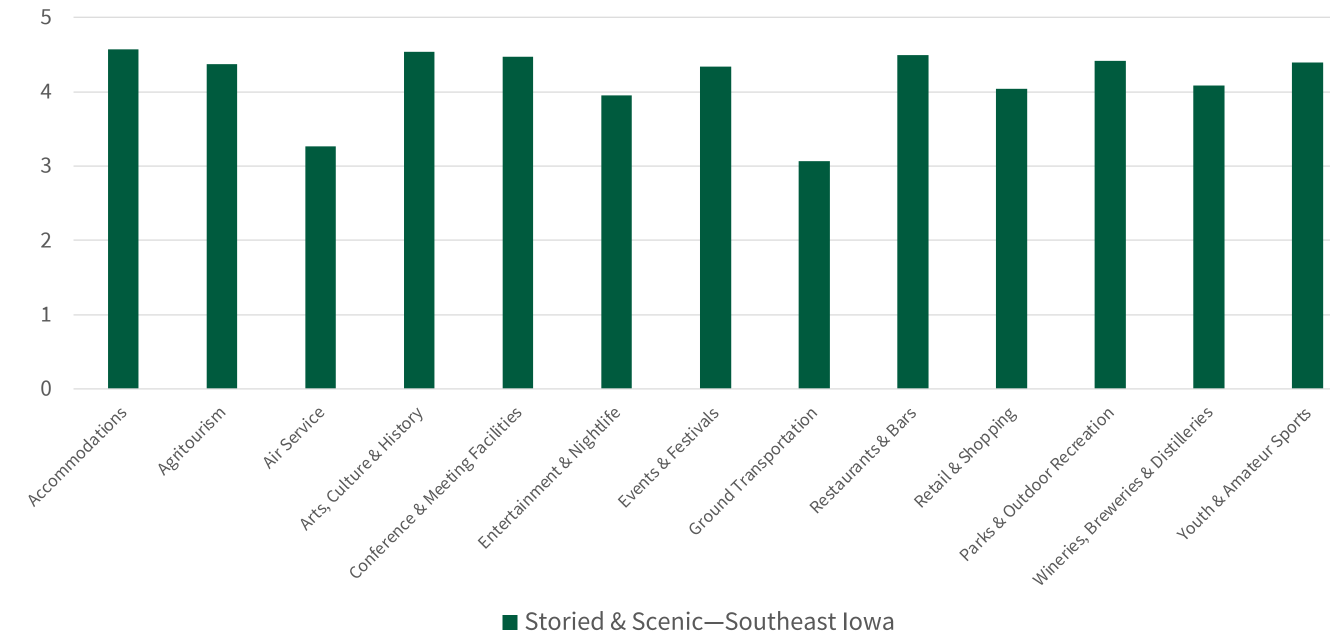
3 Welcome plus-ones (Out-Of-Region Niche)

The Out-Of-Region Niche meeting attendee has come further than other attendees, and also comes with a higher annual income. Finding opportunities to turn meetings into bleisure travel with this group—including with attendees' partners—will elevate the meetings market in Storied & Scenic as a meetings destination.

MEETING PLANNERS—THE IMPORTANCE OF FACTORS WHEN SELECTING A MEETING VENUE (N=15)

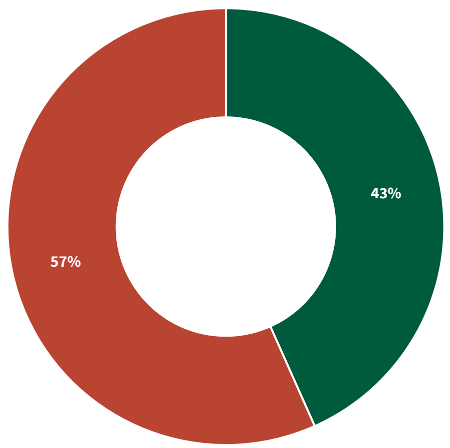


VISITOR EXPERIENCE IN STORIED & SCENIC, ALL RESPONDENTS (N=57)



APPENDIX A: SURVEY RESULTS

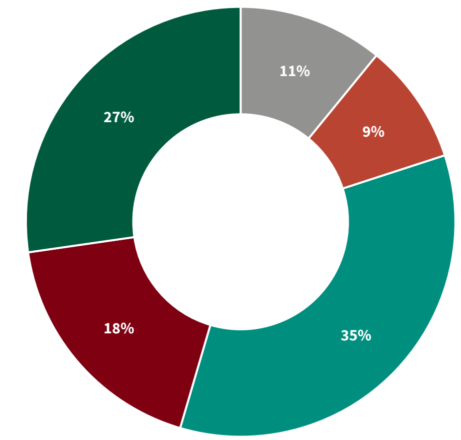
RESPONDENT SPLIT: MEETING PLANNERS VS. SUPPLIERS



- I am a meeting planner, or somebody who is an end user of meeting or convention facilities in Iowa
- I am part of the Iowa tourism industry, and my organization provides meetings/convention space, and/or I am responsible for booking meetings, and/or I promote my destination for meetings in Iowa

N=90

PLEASE INDICATE WHICH TOURISM AREA(S) OF IOWA YOU BOOK MEETINGS WITHIN (CHECK ALL THAT APPLY):

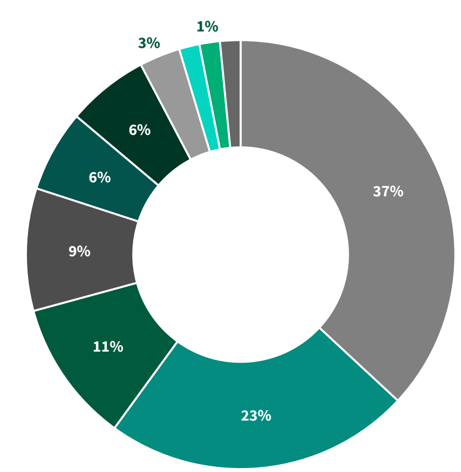


- Lakes & Land—Northwest Iowa
- Loess Hills & Beyond—Southwest Iowa
- Capital Country—Central Iowa
- Driftless Area—Northeast Iowa
- Storied & Scenic—Southeast Iowa

Planners N=39

MEETING PLANNER RESPONSES

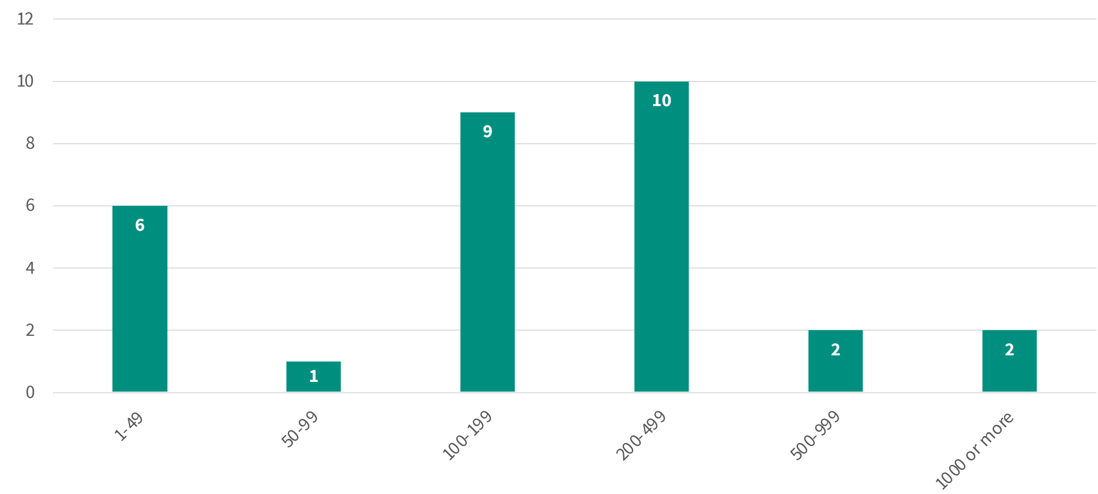
THE MEETINGS I PLAN OR BOOK ARE FOR THESE KINDS OF GROUPS (MARK ALL THAT APPLY):



- Conferences or Conventions
- Corporate or Company Meetings
- Educational Groups
- Social Groups
- Incentive Travel Groups
- Trade Shows or Expos
- Car Shows
- Association
- Military Groups
- Religious Groups

Planners N=39

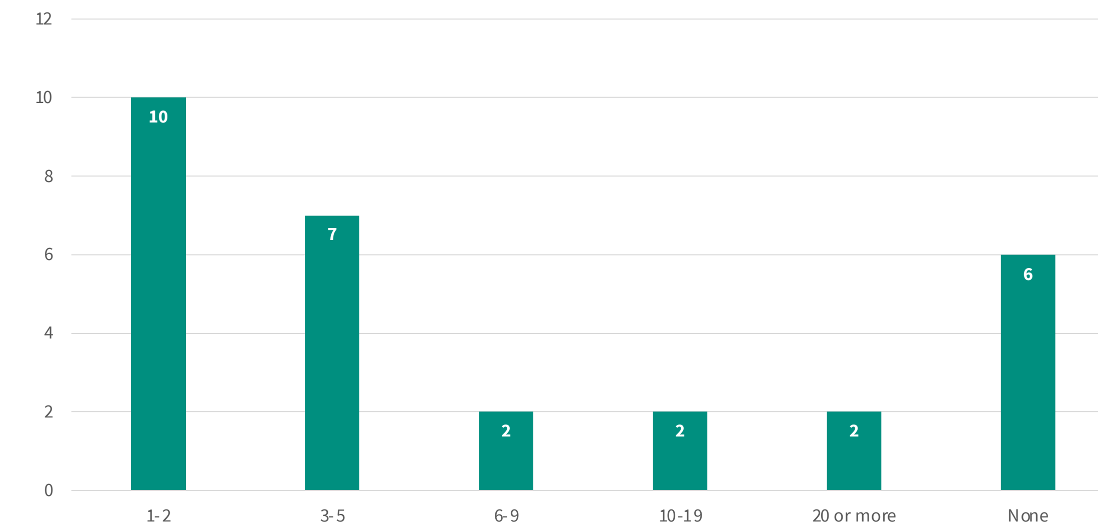
HOW MANY ATTENDEES DO THE MEETINGS YOU PLAN OR BOOK MOST COMMONLY INVOLVE?



WHEREABOUT

Planners N=30

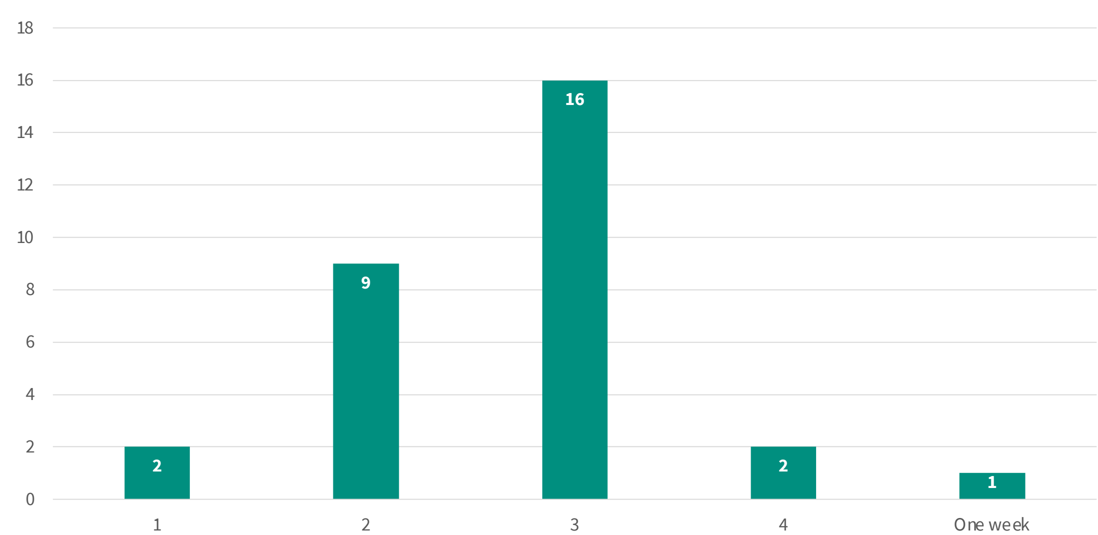
ON AVERAGE, HOW MANY MEETINGS DO YOU BOOK PER YEAR IN IOWA?



WHEREABOUT

Planners N=30

HOW MANY DAYS LONG IS A TYPICAL MEETING YOU PLAN OR BOOK?



WHEREABOUT

Planners N=30

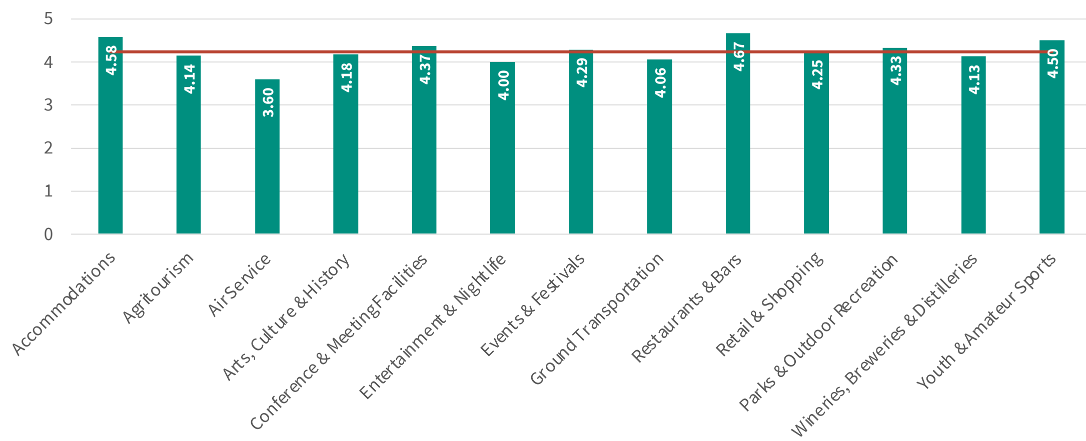
YOU INDICATED THAT YOU DO NOT PLAN OR BOOK ANY MEETINGS IN IOWA—WHAT KEEPS YOU FROM CHOOSING IOWA FOR BOOKING OR PLANNING MEETINGS?

- New to my meeting planning role. Dependent on where client wants to go and working on obtaining more clients.
- I honestly do not know a lot about Iowa's offerings for meetings, nor the neighborhood/food/dining options that offer variety to attendees near the any convention center. To be frank, I do not equate Iowa to being a diverse place that would be equally welcoming to all races, creeds, genders based on personal experience there.
- Our show changes locations around the US every year. We chose Iowa in 2024
- I am not familiar with the area.
- Not sure what Iowa has to offer. Our meetings are book out until 2027.
- We have held our event in Cedar Rapids in 2017 and 2022 and will be returning in 2027.

WHEREABOUT

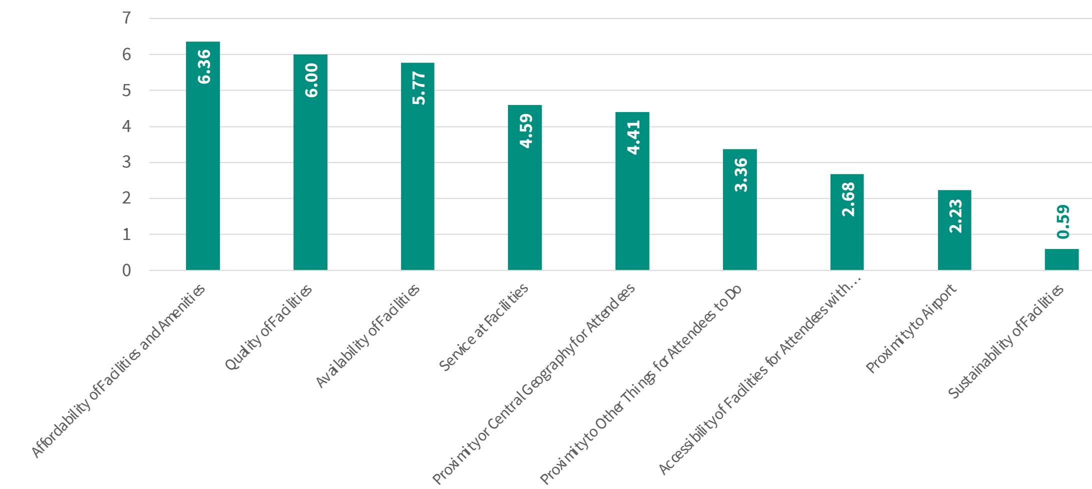
Planners N=6

HOW WOULD YOU RATE THE QUALITY OF VISITOR EXPERIENCE FOR MEETING ATTENDEES ACROSS THE FOLLOWING DIMENSIONS, WHERE 1=POOR AND 5=EXCELLENT?



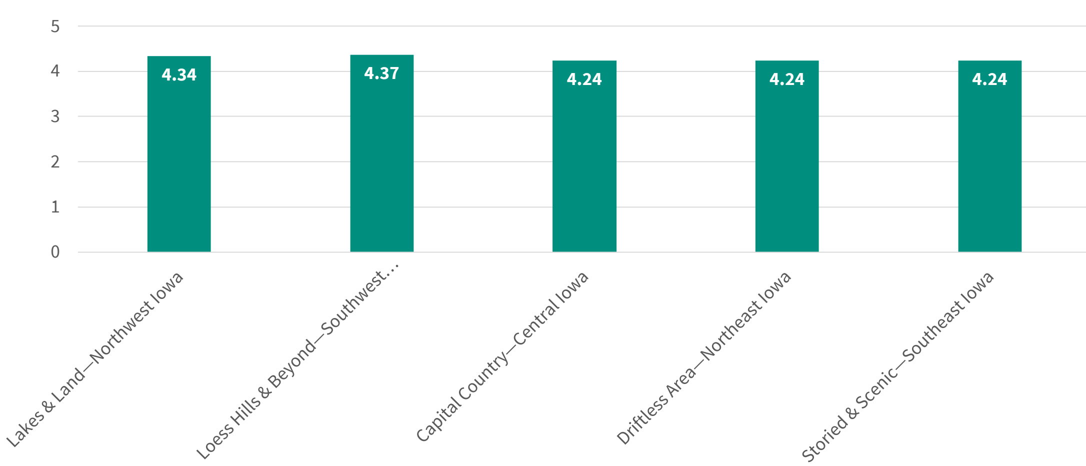
Planners N=19

WHEN BOOKING A MEETING VENUE PLEASE RANK THE IMPORTANCE OF THE FOLLOWING FROM MOST IMPORTANT TO LEAST IMPORTANT.



Planners N=22

HOW WOULD YOU RATE THE QUALITY OF VISITOR EXPERIENCE FOR MEETING ATTENDEES, WHERE 1=POOR AND 5=EXCELLENT?



Planners N=19

IN YOUR EXPERIENCE, WHAT HAS MADE A PARTICULAR CITY OR LOCATION STAND OUT WHEN COMPARING LOCATIONS?

- Coordination and workability with city leaders, convention center staff and hotel staff.
- overall attendee experience, cleanness and safety of the destination
- centrally located
- Convenience of restaurants and other activities
- We like DSM area since this is where our office is located
- Offering unique and updated venues.
- More than one hotel option, large enough event space to accommodate our group size, restaurants
- capacity of a facility and the cost
- The ability for our attendees to park at hotel and then walk to various restaurants, activities, etc. Whenever we don't have to arrange transportation it is a help to our budget and planning time.
- Depends on the client. Room rate can be a standout OR for another client - it was location.
- Des Moines is centrally located, good airport, and choices for facilities.
- Location is centrally located for our members or easy for them to access
- Easy to get around
- The perceived safety of the surrounding area
- The Fairgrounds for us and its size plus the help we can receive from the CVB in helping with housing.
- The river in Davenport
- Uniqueness of location; things to do for attendees; walkability of a location
- Affordability
- hospitality of the workers at the hotel
- Room rate including hot breakfast, location to members, proximity of museum, tours
- Mix of venues we needed; affordability; airport access.

Planners N=22

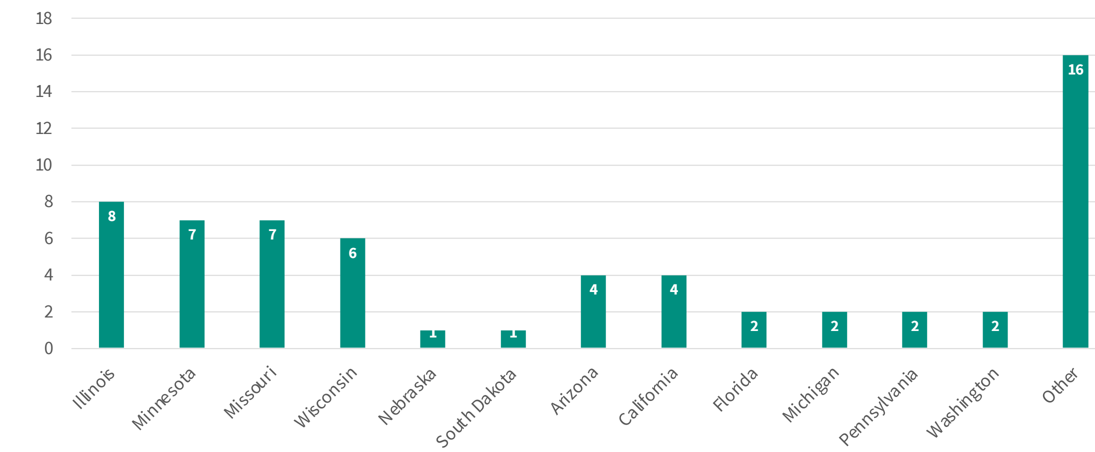
IN YOUR EXPERIENCE, WHAT HAS MADE A PARTICULAR MEETING VENUE STAND OUT WHEN COMPARING FACILITIES?

- Quality of F&B, staff response, service, AV technician response.
- Access to the outdoors
- Great food
- Top-notch service; inspiring modern meeting space; ability to accommodate food allergies with special meals
- Quality of food and beverage
- A positive experience with the venue's staff including me as a planner and my meeting attendees.
- Affordability, quality of food
- Cost, date availability and proximity to capitol/reception venue
- Proactive staff- when there is consistency of the staff from year to year and they reach out to you to confirm dates for the next year, help with planning etc. Just showing that they want your group to be there and are invested in your experience.
- Most small-med size meetings want natural light in meeting space
- Enough banquet space for our needs; quality of staff and their knowledge of our group; condition of space
- Competitive pricing with above average quality/service
- Cost
- There must be attached hotels to the venue with several options in price and quality.
- The location of the Fairgrounds with respect to the hotels and their cost per night!
- None
- Great service; able to adapt to changes in programs
- Affordability and amenities
- Updated technology
- Recently remodel or well-maintained facilities
- Sized right for our group so we don't get lost amid a crowd of other events.

WHEREABOUT

Planners N=21

ASIDE FROM THE MEETINGS YOU PLAN OR BOOK IN IOWA, WHICH OF THESE STATES DO YOU ALSO PLAN OR BOOK MEETINGS IN? (CHECK ALL THAT APPLY)



WHEREABOUT

Planners N=17

WHAT LIMITATIONS OF IOWA LEAD YOU TO BOOK MEETINGS IN PLACES OTHER THAN IOWA?

- Air lift
- Air travel
- Limited air lift
- Cost of flights
- National meetings don't come to Iowa since there are few direct flights
- Costs
- Dates that are available for us
- Don't know enough about the cities
- Expectation of lack of nightlife
- Image of it being too rural
- No wow factor
- It was difficult to get there
- Misconception of Iowa being boring
- Lack of exciting activities and upscale meeting spaces
- Location
- Location of Planers
- Locations
- Large enough hotels
- Need convention center hotels
- Quality of convention center space
- Current political climate
- Hostility of state government toward some individuals
- Recent anti LGBTQ++ legislation in Iowa
- Recent bill stripping trans people of their rights, anti abortion
- Registration at hotel for late check ins
- Too much turn-over in the hospitality industry leads to poor service
- Weather

WHEREABOUT

Planners N=15

IS THERE ANYTHING ELSE YOU THINK WE SHOULD KNOW THAT WOULD INFORM OUR STUDY OF THE MEETINGS AND CONVENTIONS MARKET IN IOWA?

- Corporation, associations and meeting planners pay attention to the legislation that is going on in states. Iowa is viewed as unfriendly in this regard and is on a list of "banned states" including Texas & Florida. I will feel much better about promoting my state (where I lived since age 3) when the anti LGBTQ & abortion laws are removed & reversed.
- As a travel professional I travel to conferences like IMEX, PCMA and others and never see Iowa with a presence. If we're looking to bring more meetings to the state then I would recommend Iowa look at being at some of these larger events.
- Julie Stow (Cedar Rapids) and Angela Raun (Dupage) are amazing and so helpful. My clients LOVE working with them and their teams
- As planners, help us with the promotion of Iowa with marketing content, etc. What's unique to Iowa that would create immersive experiences for attendees that they can't get anywhere else?
- While the prices are generally lower in Iowa, the airfare often is much higher. Easier for me to book meetings at an airline hub like Chicago, Minneapolis or Dallas.
- My attendees enjoy unique experiences/venues that are well maintained and provide quality customer service. We have found several meeting venues in Iowa that have provided good experiences and we tend to go back to the same locations. We have even switched our meeting schedules in order to be at those locations. There are great places in Iowa to meet. In comparison to other states, Iowa just does not have as many options so when I find a great location, I am hesitant to change.
- How have food price increases affected meetings? Are the length of meetings being reduced because of costs/budgets?
- Again, I am new to my role and the location is dictated by the client.
- Hotel upkeep (quality of facilities) is probably our number one issue when booking or not.
- Our situation is unique in that we bid out shows each year and travels to whatever city is awarded the bid. Our Davenport show was a huge success and we plan to bid to repeat it in Davenport in the future.
- When I start looking for additional locations for our Shows my first call is to the Convention Bureau for help, I can tell from their temperature if the new location is worth my time!
- We need better/more air service
- I would love to see the state to get a better understanding of what it offers in terms of hosting meetings and events
- Be more visible on email, social media, conventions that cater to meeting planning
- I won't book a city or venue until I've done a site visit and compared three hotel properties. I prefer to attend a FAM so I put together game plan on how to make this location work for my groups.

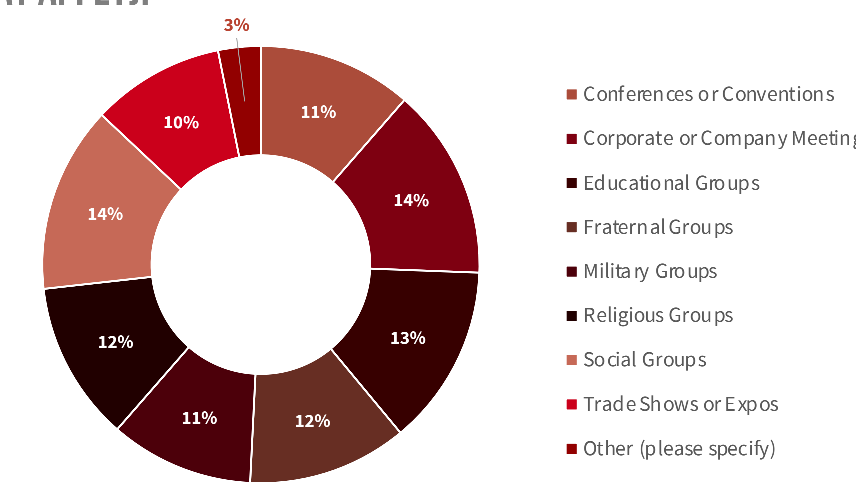
WHEREABOUT

Planners N=15

MEETING SUPPLIER RESPONSES

WHEREABOUT

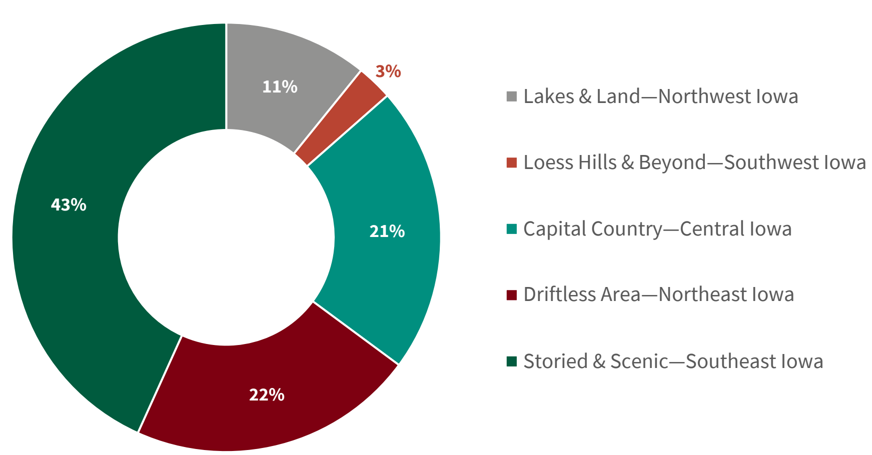
MY FACILITY OR DESTINATION SUPPLIERS THESE KINDS OF GROUPS (MARK ALL THAT APPLY):



WHEREABOUT

Suppliers N=36

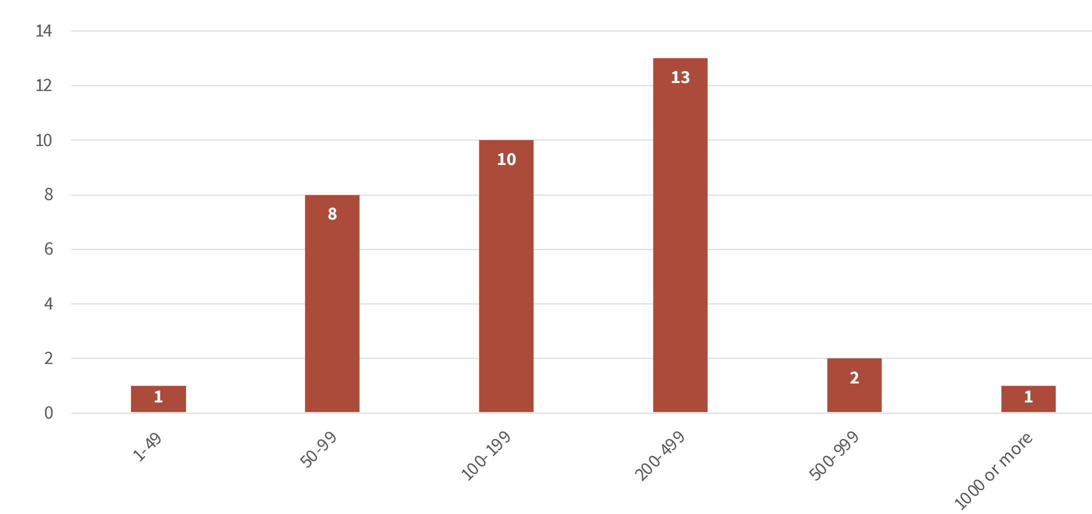
PLEASE INDICATE WHICH TOURISM AREA(S) OF IOWA YOUR MEETING FACILITY OR SCOPE OF RESPONSIBILITY IS WITHIN (CHECK ALL THAT APPLY):



WHEREABOUT

Suppliers N=31

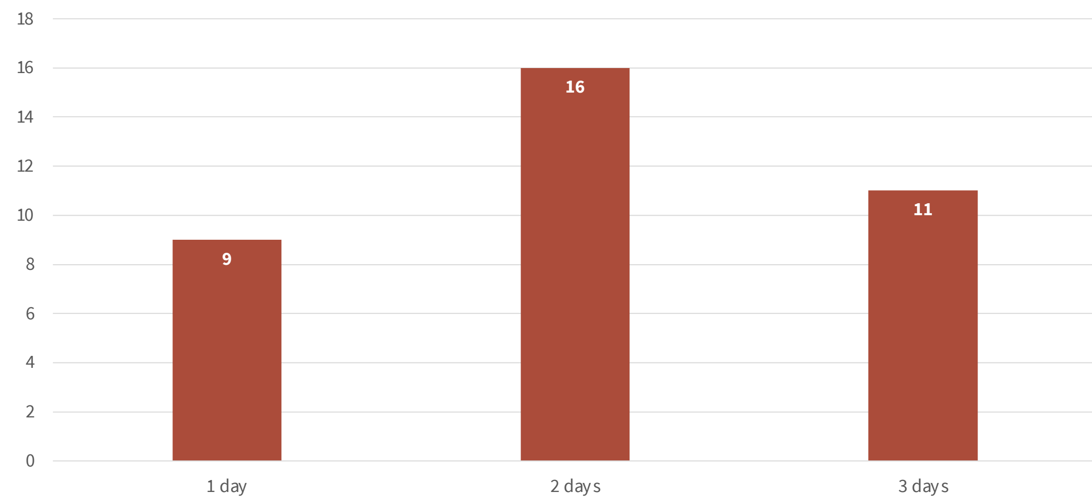
HOW MANY ATTENDEES DO THE MEETINGS AT THE FACILITY OR FACILITIES YOU REPRESENT MOST COMMONLY INVOLVE?



WHEREABOUT

Suppliers N=35

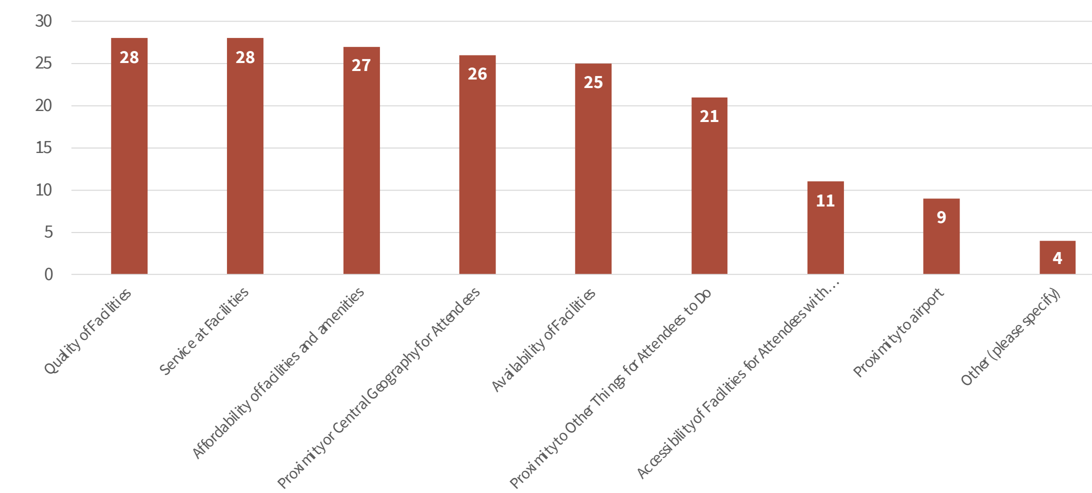
HOW MANY DAYS LONG IS A TYPICAL MEETING AT THE FACILITY OR FACILITIES YOU REPRESENT?



WHEREABOUT

Suppliers N=36

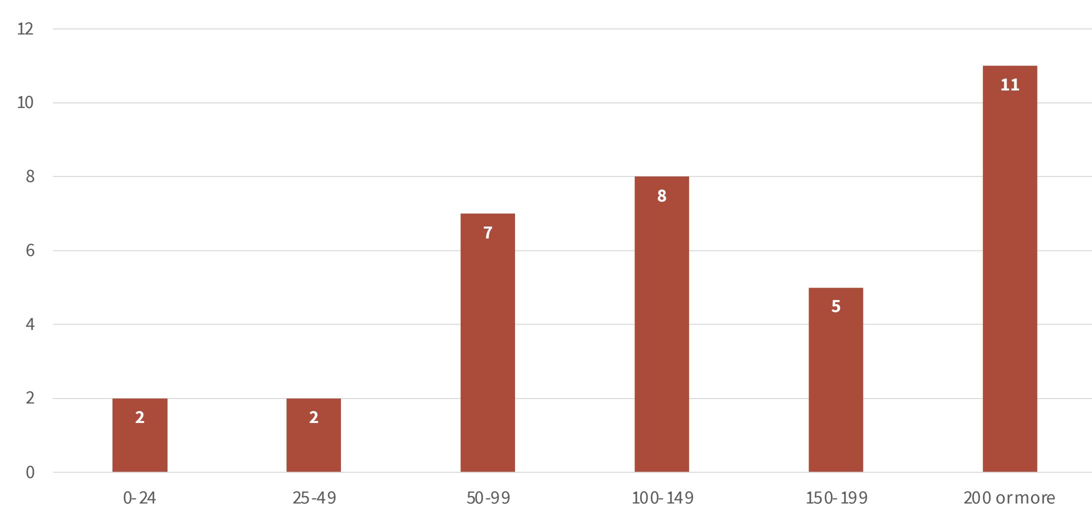
WHAT DO YOU BELIEVE ARE THE TOP REASONS THAT MEETINGS ARE BOOKED AT YOUR FACILITY OR FACILITIES (CHECK ALL THAT APPLY)?



WHEREABOUT

Suppliers N=35

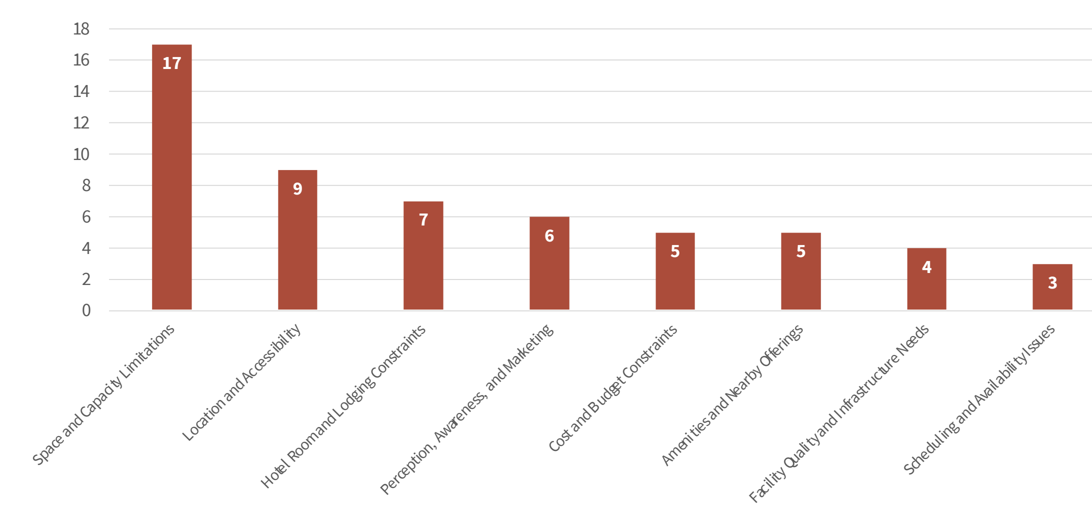
ON AVERAGE, HOW MANY DAYS PER YEAR DOES YOUR FACILITY OR FACILITIES HOST EVENTS?



WHEREABOUT

Suppliers N=35

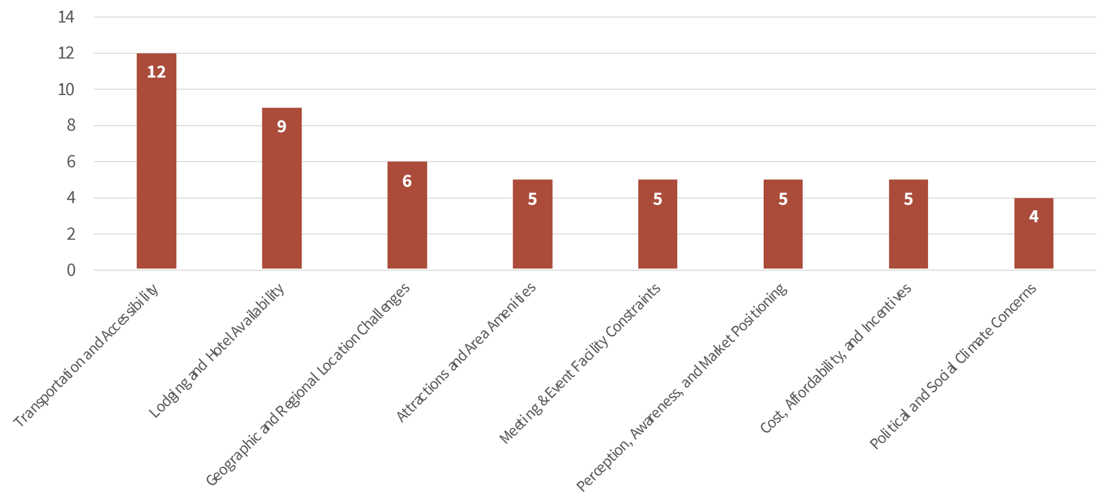
WHAT LIMITATIONS DO YOU BELIEVE PREVENT MORE MEETINGS FROM BEING BOOKED AT YOUR FACILITY?



WHEREABOUT

Suppliers N=30

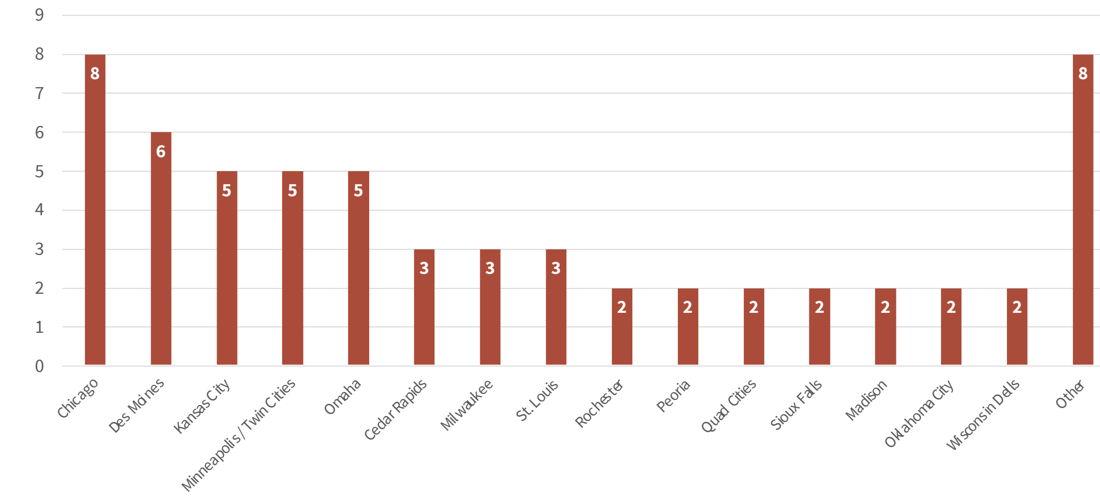
WHAT LIMITATIONS DO YOU BELIEVE PREVENT MORE MEETINGS FROM BEING BOOKED IN YOUR TOURISM AREA?



WHEREABOUT

Suppliers N=30

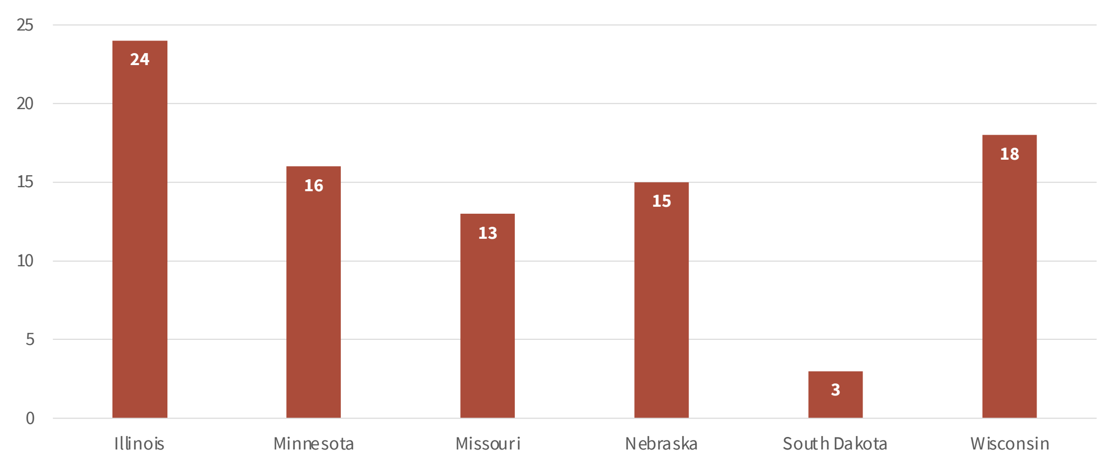
WHAT WOULD YOU LIST AS YOUR TOP THREE COMPETITIVE CITY OR TOWN MEETINGS DESTINATIONS IN THESE OTHER STATES?



WHEREABOUT

Suppliers N=26

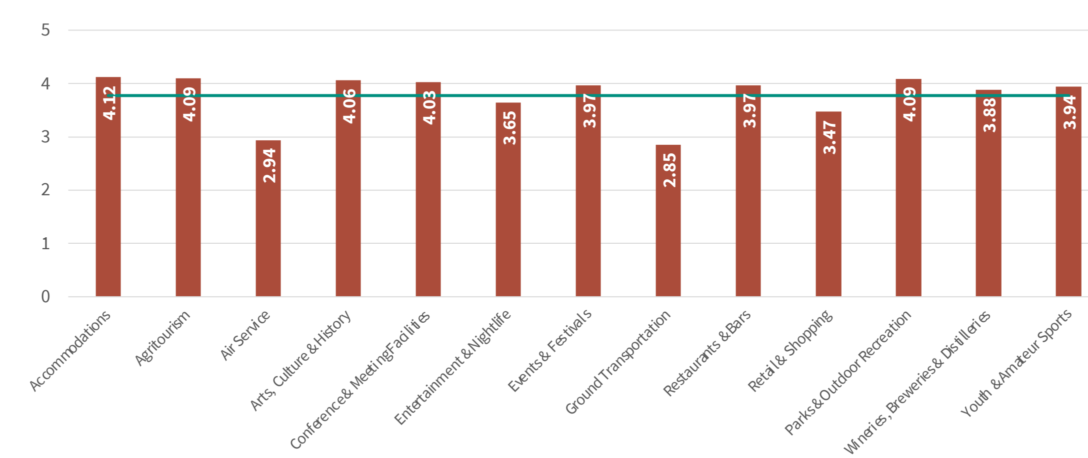
WHICH OF THESE STATES DO YOU CONSIDER TO BE DIRECT COMPETITORS FOR MEETINGS AND CONVENTIONS BUSINESS FOR YOUR LOCATION? (CHECK ALL THAT APPLY)



WHEREABOUT

Suppliers N=30

HOW WOULD YOU RATE THE QUALITY OF VISITOR EXPERIENCE FOR MEETING ATTENDEES ACROSS THE FOLLOWING DIMENSIONS, WHERE 1=POOR AND 5=EXCELLENT?



WHEREABOUT

Suppliers N=34

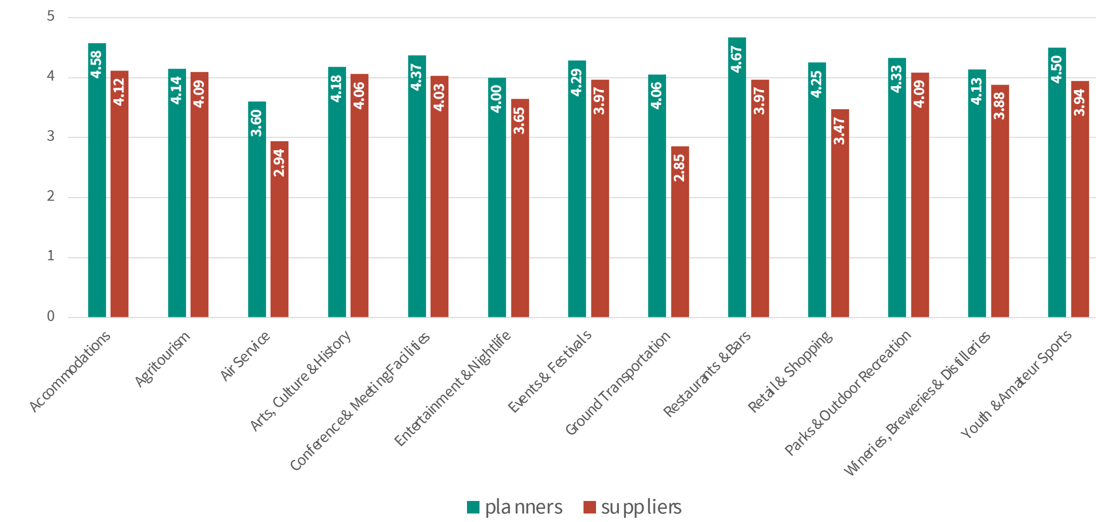
IS THERE ANYTHING ELSE YOU THINK WE SHOULD KNOW THAT WOULD INFORM OUR STUDY OF THE MEETINGS AND CONVENTIONS MARKET IN IOWA?

- iTIP has been a great asset to us by asking us to be included in the Iowa Meetings Market Guide that has come out these past few years!
- We are Midwest venues with Midwest values, and understanding preferences of each group, helps us grow and learn.

WHEREABOUT

Suppliers N=2

QUALITY OF VISITOR EXPERIENCE: PLANNERS VS. SUPPLIERS



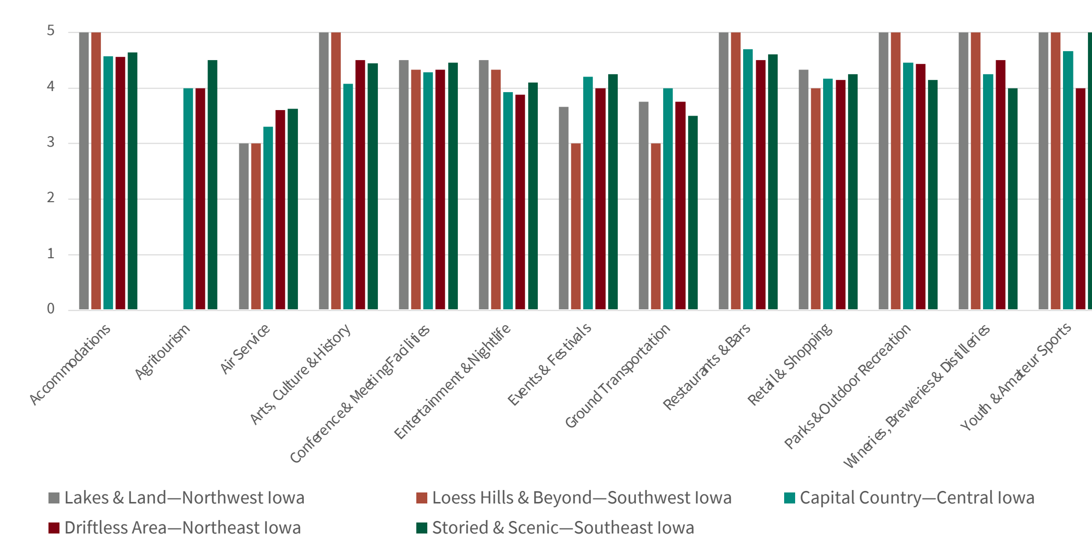
WHEREABOUT

N=53

COMPARISONS AND CROSSTABS

WHEREABOUT

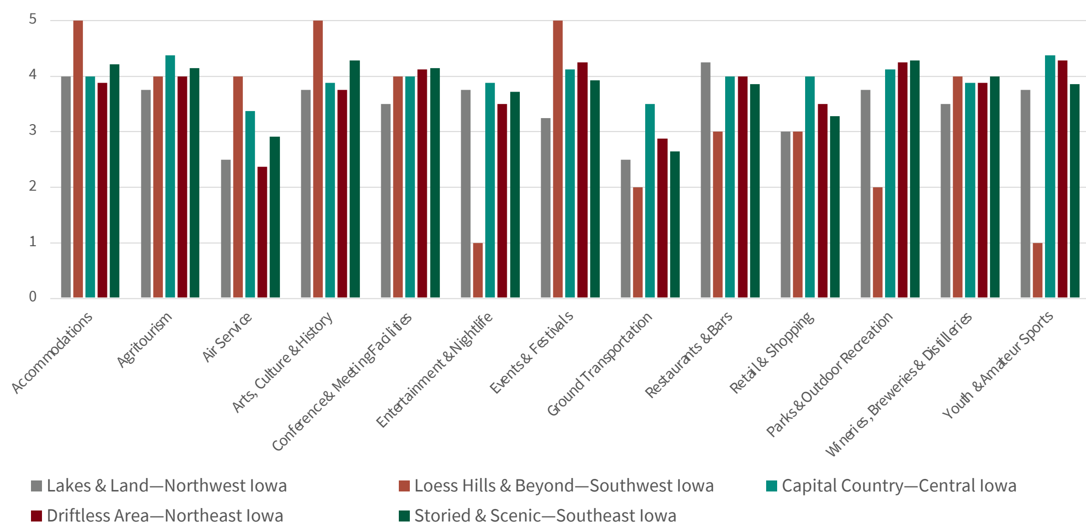
MEETING PLANNERS: QUALITY OF VISITOR EXPERIENCE BY TOURISM AREA



WHEREABOUT

Planners N=19

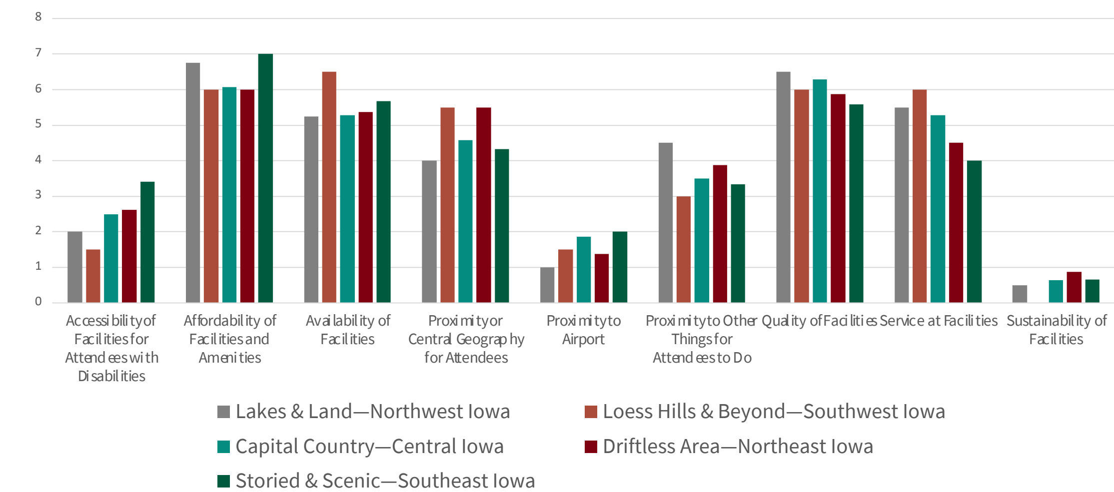
MEETING SUPPLIERS: QUALITY OF VISITOR EXPERIENCE BY TOURISM AREA



WHEREABOUT

Suppliers N=34

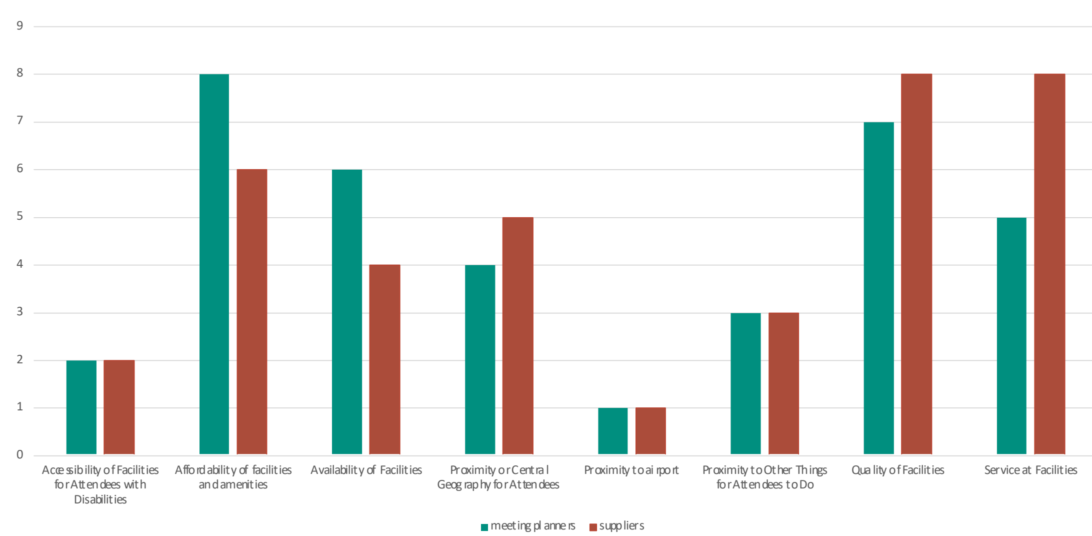
WHEN BOOKING A MEETING VENUE PLEASE RANK THE IMPORTANCE OF THE FOLLOWING FROM MOST IMPORTANT TO LEAST IMPORTANT: BY AREA



WHEREABOUT

Planners N=22

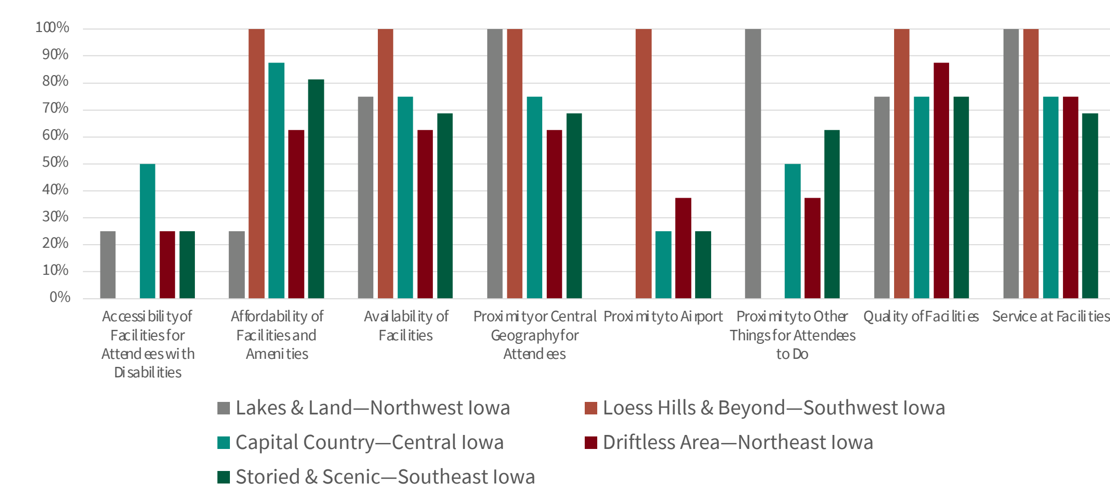
WHAT'S IMPORTANT IN MEETING VENUES: PLANNERS VS. SUPPLIERS



WHEREABOUT

N=52

TOP REASONS THAT MEETINGS ARE BOOKED AT YOUR FACILITY OR FACILITIES: BY TOURISM AREA



WHEREABOUT

Suppliers N=35

APPENDIX B: INVENTORY

INVENTORY OF IOWA MEETING FACILITIES: 1-25

No.	Facility	City	Tourism Area	Google Rating	AAA Rating	Built	Renovated	Type	Guest Rooms	Meeting Space, SF	Largest Room, SF	Meeting Rooms	Exhibit Space, SF	Total Meeting, SF
1	AmericInn by Wyndham Maquoketa	Maquoketa	Scenic & Storied	3.6	—	2003	2019	Hotel	63	8,100	4,100	2	—	8,100
2	Ameristar Casino Hotel Council Bluffs	Council Bluffs	Loess Hills & Beyond	4	4 Star	1996	—	Hotel	160	8,000	4,958	3	5,000	8,000
3	Baymont by Wyndham Des Moines Airport	Des Moines	Capital Country	4.5	3 Star	1995	2016	Hotel	56	4,000	3,731	4	—	4,000
4	BEST WESTERN Holiday Lodge	Clear Lake	Lakes & Land	4.2	2 Star	1964	2017	Hotel	136	6,000	3,456	1	—	6,000
7	Best Western Plus Dubuque Hotel & Conference Center	Dubuque	Driftless Area	4.4	3 Star	1979	2022	Hotel	150	12,725	4,006	9	—	12,725
6	Best Western Plus Longbranch Hotel & Convention Center	Cedar Rapids	Scenic & Storied	4.1	3 Star	1979	2022	Resort	—	3,711	3,711	11	—	3,711
7	Best Western Plus Steeplegate Inn	Davenport	Scenic & Storied	4.2	3 Star	1985	2015	Hotel	118	8,200	3,737	6	—	8,200
8	Bien Venu Event Center	Cedar Falls	Driftless Area	4.5	—	2019	—	Special Event Venue	—	8,818	5,600	7	—	44,425
9	Boulders Conference Center	Denison	Loess Hills & Beyond	4.2	—	2006	—	Conference Center	400	12,446	5,640	6	—	12,446
10	Bridge View Center	Ottumwa	Scenic & Storied	4.4	—	2007	—	Special Event Venue	—	56,233	30,000	15	—	56,233
11	Burlington Memorial Auditorium	Burlington	Scenic & Storied	4.5	—	1939	2020	Special Event Venue	—	2,310	2,310	1	—	2,310
12	Cardiff Center at Fort Frenzy	Fort Dodge	Capital Country	4.7	—	2019	—	Special Event Venue		7,000	6500	4	-	7,000
13	Carrollton Inn	Carroll	Loess Hills & Beyond	4.2	—	1978	2015	Hotel	86	5,000	5,000	1	—	5,000
14	Catfish Bend Conference & Event Center	Burlington	Scenic & Storied	4.1	3 Star	2007	2008	Resort	185	30,000	9,060	10	9,000	30,000
15	Clarion Inn - Des Moines	Des Moines	Capital Country	4.2	—	1974	2017	Hotel	139	8,000	4,402	8	—	8,000
16	Clay County Regional Events Center	Spencer	Lakes & Land	4.6	—	2003	—	Conference Center	—	35,380	24,000	8	25,000	35,380
17	Comfort Suites Burlington	Burlington	Scenic & Storied	4.4	3 Star	2005	2017	Hotel	86	9,315	7,372	10	—	9,315
18	Courtyard Des Moines Ankeny	Ankeny	Capital Country	4.4	3 Star	2008	2018	Hotel	119	6,300	5,280	6	—	6,300
19	Courtyard Iowa City University Heights	Iowa City	Scenic & Storied	4.5	4 Star	2021	—	Hotel	140	13,310	2,501	5	—	13,310
20	Courtyard Sioux City Downtown	Sioux City	Lakes & Land	4.2	5 Star	2019	2020	Hotel	150	60,288	28,634	20	50,000	60,288
21	Courtyard Waterloo Cedar Falls	Waterloo	Driftless Area	4.2	—	2017	—	Hotel	166	4,500	4,500	1	—	4,500
22	Des Moines Marriott Downtown	Des Moines	Capital Country	4.3	3 Star	1981	2018	Hotel	413	33,851	15,340	16	—	33,851
23	Diamond Event Center	Cedar Falls	Driftless Area	4.6	—	2018	—	Special Event Venue	—	6,259	6,259	3	6,259	6,259
24	DMACC Newton Conference Center	Newton	Capital Country	4.8	—	2010	2020	Conference Center	—	7,115	2,100	8	—	7,115
25	DoubleTree by Hilton Davenport	Davenport	Scenic & Storied	3.3	—	1995	2019	Hotel	223	17,678	7,812	9	—	17,678

INVENTORY OF IOWA MEETING FACILITIES: 26-50

No.	Facility	City	Tourism Area	Google Rating	AAA Rating	Built	Renovated	Type	Guest Rooms	Meeting Space, SF	Largest Room, SF	Meeting Rooms	Exhibit Space, SF	Total Meeting, SF
26	DoubleTree by Hilton Hotel Cedar Rapids Convention Complex	Cedar Rapids	Scenic & Storied	4.2	—	2013	2013	Hotel	267	17,678	7,812	9	—	80,000
27	Drury Inn & Suites - West Des Moines, IA	Des Moines	Capital Country	4.6	3 Star	2008	2018	Hotel	180	80,000	27,300	20	27,300	3,210
28	Drury Inn & Suites Iowa City Coralville	Coralville	Scenic & Storied	4.8	3 Star	2019	2019	Hotel	180	3,210	2,290	6	—	4,971
29	Embassy Suites by Hilton Des Moines Downtown	Des Moines	Capital Country	4	3 Star	1990	2011	Hotel	234	4,971	2,090	5	—	20,000
30	Fairfield Arts & Convention Center	Fairfield	Scenic & Storied	4.7	—	2007	—	Convention Center	—	20,000	10,725	17	—	11,000
31	Fairfield Inn & Suites Decorah	Decorah	Driftless Area	4.6	—	2017	—	Hotel	84	11,000	7,168	6	7,000	2,500
32	Fairfield Inn & Suites Des Moines Urbandale	Urbandale	Capital Country	4.3	—	2014	—	Hotel	89	2,500	2,500	1	—	2,000
33	Gateway Hotel & Conference Center	Ames	Capital Country	4.3	3 Star	1978	2005	Conference Center	187	2,000	2,000	1	—	17,400
34	Graduate by Hilton Iowa City	Iowa City	Scenic & Storied	4.1	3 Star	1984	2018	Hotel	234	17,400	7,280	9	—	10,455
35	Grand Falls Casino Resort	Larchwood	Lakes & Land	4.1	—	2011	—	Resort	—	10,455	6,222	10	—	12,000
36	Grand Harbor Resort And Waterpark	Dubuque	Driftless Area	3.8	3 Star	2002	2012	Resort	—	12,000	12,000	1	—	86,000
37	Grand River Center	Dubuque	Driftless Area	4.5	—	2003	—	Conference Center	—	86,000	30,000	3	30,000	86,000
38	GrandStay Rock Valley	Rock Valley	Lakes & Land	4.6	—	2019	—	Hotel		86,000	30,000	13	30,000	8,500
39	Hampton Inn Council Bluffs	Council Bluffs	Loess Hills & Beyond	4.2	2 Star	2000	2020	Hotel	98	8,500	8,500	1	—	6,042
40	Harrah's Council Bluffs	Council Bluffs	Loess Hills & Beyond	3.9	—	1996	2002	Hotel	251	6,042	2,888	5	—	156,299
41	Hilton Des Moines Downtown	Des Moines	Capital Country	4.2	3 Star	2018	2018	Hotel	330	156,299	30,000	2	—	14,000
42	Hilton Garden Inn Ames	Ames	Capital Country	4	3 Star	2008	2021	Hotel	112	14,000	9,940	9	—	2,240
43	Hilton Garden Inn Bettendorf/Quad Cities	Bettendorf	Scenic & Storied	4.4	3 Star	2015	2015	Hotel	115	2,240	2,240	3	—	3,000
44	Hilton Garden Inn Cedar Falls	Cedar Falls	Driftless Area	4.3	3 Star	2012	2012	Hotel	113	3,000	2,400	4	—	32,779
45	Hilton Garden Inn Cedar Rapids	Cedar Rapids	Scenic & Storied	4.6	—	2021	—	Hotel	100	32,779	11,133	9	9,817	3,800
46	Hilton Garden Inn Des Moines/Urbandale	Johnston	Capital Country	4.4	—	2004	2017	Hotel	148	3,800	3,744	5	—	11,000
47	Hilton Garden Inn Dubuque Downtown	Dubuque	Driftless Area	4.3	3 Star	2005	2005	Hotel	116	11,000	4,214	8	6,099	6,670
48	Hilton Garden Inn Iowa City Downtown University	Iowa City	Scenic & Storied	4.5	3 Star	2017	—	Hotel	143	6,670	6,670	10	—	3,000
49	Hilton Garden Inn Omaha East/Council Bluffs	Council Bluffs	Loess Hills & Beyond	4	—	2009	2009	Hotel	153	3,000	2,788	1	—	4,696
50	Hilton Garden Inn Sioux City Riverfront	Sioux City	Lakes & Land	4.3	3 Star	2008	2020	Hotel	123	4,696	3,200	4	—	8,500

INVENTORY OF IOWA MEETING FACILITIES: 51-75

No.	Facility	City	Tourism Area	Google Rating	AAA Rating	Built	Renovated	Type	Guest Rooms	Meeting Space, SF	Largest Room, SF	Meeting Rooms	Exhibit Space, SF	Total Meeting, SF
51	Hilton Garden Inn West Des Moines	Des Moines	Capital Country	4.3	—	2005	2005	Hotel	176	8,500	3120	3	—	8,818
52	Holiday Inn & Suites Council Bluffs I-29	Council Bluffs	Loess Hills & Beyond	—	3 Star	1997	2022	Hotel	185	44,425	14,000	8	23,000	6,030
53	Holiday Inn & Suites Des Moines-Northwest	Urbandale	Capital Country	3.9	3 Star	1974	2021	Hotel	198	6,030	3080	8	6,000	17,000
54	Holiday Inn Des Moines DTWN - Mercy Area	Des Moines	Capital Country	4	3 Star	1972	2019	Hotel	251	17,000	4,500	18	5,007	8,650
55	Holiday Inn Des Moines-Airport/Conf Center	Des Moines	Capital Country	4.1	3 Star	1975	2018	Hotel	213	8,650	4,290	4	4,000	34,000
56	Holiday Inn Dubuque/Galena	Dubuque	Driftless Area	4.2	3 Star	1991	2023	Hotel	193	34,000	12,000	18	6,000	9,599
57	Holiday Inn Hotel & Suites Davenport	Davenport	Scenic & Storied	4.3	—	2014	—	Hotel	104	9,599	3,075	7	6,000	3,000
58	Honey Creek Resort State Park	Moravia	Scenic & Storied	4.2	3 Star	2008	2024	Hotel	133	3,000	2,814	5	4,000	11,755
59	Hotel Blackhawk, Autograph Collection	Davenport	Scenic & Storied	4.5	4 Star	1915	2024	Hotel	130	11,755	4,284	5	—	8,911
60	Hotel Fort Des Moines, Curio Collection by Hilton	Des Moines	Capital Country	4.6	4 Star	1919	2021	Hotel	287	8,911	3,344	6	4,000	14,000
61	Hotel Grinnell, Ascend Hotel Collection	Grinnell	Scenic & Storied	4.5	—	1921	2016	Hotel	45	14,000	8,100	9	3,932	9,000
62	Hotel Julien Dubuque	Dubuque	Driftless Area	4.4	—	1839	2009	Hotel	—	9,000	5,000	1	—	14,000
63	Hotel Winneshiek	Decorah	Driftless Area	4.5	—	1905	2000	Boutique Hotel	31	14,000	3,450	10	—	5,380
64	Hyatt Regency Coralville Hotel & Conference Center	Coralville	Scenic & Storied	4.4	4 Star	2006	2023	Hotel	288	5,380	2,794	3	—	81,088
65	Iowa Events Center (multiple buildings)	Des Moines	Capital Country	4.5	—	2005	2024	Convention Center	—	81,088	30,000	13	30,000	236,500
66	Iowa State Fairgrounds	Des Moines	Capital Country	4.6	—	1911	2010	Special Event Venue	—	236,500	146,920	40	150,000	1,000,000
67	Isle Casino Hotel Bettendorf	Bettendorf	Scenic & Storied	3.9	—	1995	2007	Hotel	500	1,000,000	184,096	4	110,000	40,000
68	Isle Casino Hotel Waterloo	Waterloo	Driftless Area	3.8	—	2007	—	Hotel	—	40,000	25,000	1	—	5,000
69	Isle Hotel & Waterfront Convention Center	Bettendorf	Scenic & Storied	—	3 Star	2009	2016	Convention + Hotel.	509	5,000	5,000	2	—	40,000
70	King's Pointe Resort	Storm Lake	Lakes & Land	4.1	3 Star	2007	—	Resort	100	40,000	14,190	16	15,000	3,000
71	Meskwaki Bingo Casino Hotel	Tama	Scenic & Storied	4.1	—	1992	2025	Hotel	400	3,000	2,751	6	1,000	14,000
72	Mid-America Center	Council Bluffs	Loess Hills & Beyond	4.4	—	2002	2015	Convention +Hotel	—	14,000	11,000	1	—	148,790
73	North Iowa Events Center	Mason City	Lakes & Land	4.4	—	1955	2025	Special Event Venue	—	148,790	30,000	22	25,000	68,000
74	Radisson Hotel & Conference Center Coralville - Iowa City	Coralville	Scenic & Storied	3.8	2 Star	1977	2016	Hotel	95	68,000	26,000	3	—	7,000
75	Radisson Hotel Ames Conference Center at ISU	Ames	Capital Country	3.7	3 Star	2000	2018	Hotel	75	9,266	4,530	4	—	9,266

INVENTORY OF IOWA MEETING FACILITIES: 76-99

No.	Facility	City	Tourism Area	Google Rating	AAA Rating	Built	Renovated	Type	Guest Rooms	Meeting Space, SF	Largest Room, SF	Meeting Rooms	Exhibit Space, SF	Total Meeting, SF
76	Radisson Hotel Cedar Rapids	Cedar Rapids	Scenic & Storied	4.1	3 Star	1988	2007	Hotel	220	25,923	11,174	10	—	25,923
77	Ramada by Wyndham Bettendorf	Bettendorf	Scenic & Storied	2.7	3 Star	1989	2006	Hotel	117	5,915	3,603	3	—	5,915
78	Ramada by Wyndham Des Moines Tropics Resort & Cfc. Ctr.	Des Moines	Capital Country	3.1	—	1970	1999	Hotel	166	10,000	5,200	6	—	10,000
79	Renaissance Des Moines Savery Hotel	Des Moines	Capital Country	4.1	3 Star	1919	2018	Hotel	209	12,053	6,496	5	6,000	12,053
80	Riverside Casino & Golf Resort	Riverside	Scenic & Storied	4.1	—	2007	2018	Hotel	200	12,000	8,100	6	—	12,000
81	Sheraton West Des Moines Hotel	Des Moines	Capital Country	4.2	3 Star	1986	2018	Hotel	285	22,321	12,012	16	20,000	22,321
82	Sioux City Convention Center	Sioux City	Lakes & Land	4.4	—	1988	2019	Convention Center	145	1,400	—	1	—	1,400
83	Sleep Inn Marion	Marion	Scenic & Storied	3.5	—	1999	2009	Hotel	59	24,752	24,752	1	—	24,752
84	Stoney Creek Hotel & Conference Center - Johnston	Johnston	Capital Country	4.3	—	2001	—	Hotel	165	10,240	4,543	7	—	10,240
85	Stoney Creek Hotel & Conference Center - Sioux City	Sioux City	Lakes & Land	4.4	—	2009	—	Hotel	161	12,520	6,500	3	16,000	12,520
86	Suburban Studios- Fort Dodge	Fort Dodge	Lakes & Land	3.3	—	2023	—	Hotel	47	5,772	3,315	3	—	5,772
87	Supertel Inn & Conference Center	Creston	Loess Hills & Beyond	3.7	—	2006	—	Hotel	41	3,265	3,264	2	—	3,265
88	Surety Hotel	Des Moines	Capital Country	4.5	4 Star	1913	2020	Hotel	137	6,488	2,969	7	2,969	6,488
89	The Continental	Centerville	Scenic & Storied	4.5	—	1893	1997	Boutique Hotel	—	2,268	2,268	4	—	2,268
90	The Highlander Hotel	Iowa City	Scenic & Storied	4.4	—	1967	2023	Hotel	84	21,000	5,832	5	5,832	21,000
91	The Historic Park Inn Hotel	Mason City	Lakes & Land	4.7	3 Star	1910	2011	Hotel	27	8,170	2,400	7	—	8,170
92	The Hotel at Kirkwood Center	Cedar Rapids	Scenic & Storied	4.6	4 Star	2010	2020	Hotel	71	17,361	7,500	8	4,000	17,361
93	The Merrill Hotel, Muscatine, a Tribute Portfolio Hotel	Muscatine	Scenic & Storied	4.7	4 Star	2018	—	Hotel	122	12,000	4,719	13	—	12,000
94	The Rewind West Des Moines, Tapestry Collection by Hilton	Des Moines	Capital Country	4.5	—	2008	2020	Hotel	137	4,420	2,080	4	—	4,420
95	The RiverCenter	Davenport	Scenic & Storied	4.5	—	1982	1993	Special Event Venue	—	86,151	32,400	23	32,000	86,151
96	The Warrior Hotel, Autograph Collection	Sioux City	Lakes & Land	4.4	5 Star	1930	2020	Hotel	148	8,423	3,961	8	—	8,423
97	TownePlace Suites Ames	Ames	Capital Country	4.5	—	2015	—	Hotel	89	2,500	2,500	1	—	2,500
98	Waterloo Convention Center at Sullivan Brothers Plaza	Waterloo	Driftless Area	4.3	—	1970	2021	Special Event Venue	—	40,000	19,153	11	—	40,000
99	West Des Moines Marriott	Des Moines	Capital Country	4.3	3 Star	1980	2012	Hotel	220	8,623	4,602	5	2,500	8,623

APPENDIX C: VISITOR PROFILES

VISITOR DEMOGRAPHIC & PSYCHOGRAPHIC PROFILES

We identified a representative sample of three meetings & convention facilities within each tourism area and gathered visitor location data to identify the ten most frequent non-Iowa origin ZIP codes for visitors to meetings & conventions within each tourism area. From those ZIP codes, we synthesized associated data for the mix of ZIP codes, creating urban and rural profiles where there were large groups of each. See Sources Cited (page 100) for a complete list of data sources that informed these profiles.

Capital Country Visitor Profiles

Urban Adventurers (Urban ZIPs)

The Urban Adventurers come from some of the most dynamic metro areas in the country—Chicago, IL; Los Angeles, CA; Dallas, TX; and the Bay Area of California among them. These visitors are diverse in race and ethnicity, highly educated, and occupy a wide spectrum of income levels. Many are dual-income professionals in their 30s and 40s, with household incomes often ranging from $60K to over $150K. Their values lean progressive, with interests rooted in cultural enrichment, personal growth, and social impact. They reside in a mix of urban apartments and suburban homes, balancing convenience with quality of life.

They are digitally immersed, preferring streaming services and social media platforms like Instagram and LinkedIn over traditional media. Dining out, exploring art and music, and engaging in outdoor recreation are core to their lifestyle. When traveling, they seek destinations that combine authenticity with sophistication—boutique hotels, public art, culinary experiences, and walkable districts. They typically travel multiple times a year, often by plane, and are drawn to Iowa's Capital Country for its blend of culture, events, and civic amenities. These visitors want to do, see, and share—especially when a destination surprises them with depth and diversity.

Demographic Information

- Population: Urban, with 100,000 to over 1 million per ZIP
- Age Distribution: Mostly 25–54, with both young professionals and families
- Gender Breakdown: Roughly equal male/female
- Racial/Ethnic Composition: Highly diverse (White, Hispanic, Black, Asian communities)
- Household Types: Mix of families, couples, and singles
- Household Size: Average ~2.4 to 3.0
- Educational Attainment: 40–60% bachelor's degree or higher
- Income Distribution: Ranges widely—$50K to $150K+
- Housing: Mix of renters and homeowners; values range from $300K to $800K+

Psychographic Segmentation

- Lifestyle Segments: "Urban Achievers," "Laptops & Lattes," "Young & Restless," "Metro Renters"
- Core Values: Diversity, self-expression, social equity, personal growth
- Preferred Activities: Live music, food trucks, art walks, hiking, streaming media
- Media Preferences: Heavy digital use; YouTube, Spotify, streaming platforms dominate

Consumer Behavior & Market Potential

- Shopping Habits: Brand-flexible; shop online, prioritize convenience and experience
- Dining Preferences: Fast casual, global cuisines, food markets
- Recreational Spending: High on travel, fitness classes, concerts, and outdoor gear
- Media Consumption: Social media, podcasts, digital news
- Health & Wellness: High interest in fitness, organic food, mental wellness
- Financial Behaviors: Use digital banking, credit cards, moderate investments
- Vehicle Preferences: Fuel-efficient SUVs, electric or hybrid cars
- Technology Adoption: Early adopters of smart home and streaming tech

Media Preferences

- Social Media: Instagram, LinkedIn, YouTube, Facebook
- Broadcast Media: NPR, streaming news, select cable series
- Print Media: Digital-first readers; niche lifestyle magazines

Travel Preferences

- Likely Destinations: Urban centers, national parks, cultural hubs
- Accommodation Preferences: Boutique hotels, upscale Airbnbs
- Transportation: Fly frequently, use rideshare and rental cars
- Activity Preferences: Arts & culture, food experiences, nature trails
- Days Spent Traveling Annually: 3–5 trips, often 3–7 days each

Heritage Explorers (Rural ZIPs)

The Heritage Explorers are rooted in rural communities where tradition, self-reliance, and community define everyday life. Coming from areas like La Farge, WI and parts of rural Nevada, they are older on average (many aged 45–65+) and predominantly White. They tend to own their homes outright or with minimal debt, often in small towns where the cost of living is low. Their educational attainment skews toward high school or some college, and their household incomes fall within modest but stable ranges of $40K–$65K.

These visitors favor experiences that reflect values of simplicity, family, and heritage. They're loyal travelers—returning to destinations that feel familiar and trustworthy. While not typically influenced by trends, they are deeply influenced by reputation and word-of-mouth. Their media use is rooted in local TV, AM/FM radio, and Facebook. When they visit Iowa's Capital Country, they look for clean, comfortable lodging, accessible parking, and attractions that combine history, family fun, and natural beauty. Traveling a few times a year, often by car, they prefer leisurely road trips, fairs, and affordable dining. They may not travel far or often, but when they do, they want it to count.

Demographic Information

- Population: Small-town or rural (~2,000–25,000 per ZIP)
- Age Distribution: Skews 45+, strong Boomer presence

- Gender Breakdown: Roughly equal male/female
- Racial/Ethnic Composition: Predominantly White
- Household Types: Many married couples and retirees
- Household Size: Typically 2.0–2.5
- Educational Attainment: Mostly high school/some college
- Income Distribution: Typically $40K–$65K
- Housing: Mostly homeowners, home values around $150K–$250K

Psychographic Segmentation
- Lifestyle Segments: “Country Strong,” “Prairie Living,” “Traditional Times”
- Core Values: Faith, independence, family, localism
- Preferred Activities: Gardening, hunting, local festivals
- Media Preferences: Broadcast TV, Facebook, local radio and newspaper

Consumer Behavior & Market Potential
- Shopping Habits: Value-oriented; shop at Walmart, Menards, local stores
- Dining Preferences: Diners, fast food, chain restaurants
- Recreational Spending: Modest; prefer low-cost, practical experiences
- Media Consumption: Local news, talk radio, TV dramas
- Health & Wellness: Primary care and functional wellness (less trend-driven)
- Financial Behaviors: Local banks, credit unions, cautious with credit
- Vehicle Preferences: Trucks, used SUVs; value reliability
- Technology Adoption: Basic smartphone and internet usage

Media Preferences
- Social Media: Facebook primary; light YouTube use
- Broadcast Media: Local TV stations, public radio
- Print Media: Weekly newspapers, hunting, and home improvement magazines

Travel Preferences
- Likely Destinations: Midwest towns, national monuments, RV parks
- Accommodation Preferences: Budget motels, RV parks, chain hotels
- Transportation: Drive own vehicle
- Activity Preferences: Sightseeing, fairs, historical museums
- Days Spent Traveling Annually: 1–3 trips/year, 2–4 days each

Driftless Area Visitor Profiles

Eco-Curious Explorers (Urban & Suburban ZIPs)

The Eco-Curious Explorers hail from diverse metro and suburban communities like Sacramento, CA; Milwaukee, WI; and Sheboygan, WI. These visitors tend to be younger to middle-aged adults—many are Millennials and Gen X—with strong environmental values, wellness interests, and a desire for authenticity. They are moderately to highly educated and represent a broad income spread, typically between $50K and $120K. Many work in education, healthcare, public service, or creative fields, and they enjoy flexible schedules that allow for multiple trips per year.

These travelers are drawn to the Driftless Area’s unspoiled landscapes, historic towns, and agritourism. They value sustainability, artisanal experiences, and natural beauty. Their media habits skew digital—streaming, podcasts, and social platforms like Instagram and Pinterest are popular. Dining preferences lean local and organic, with an interest in farmers markets and farm-to-table restaurants. They’re brand-flexible but environmentally mindful, often seeking experiences that align with their values. In Iowa, they seek hiking trails, river towns, art walks, and unique local makers—places where they can connect with nature and community alike.

Demographic Information
- Population: Mixed ZIPs, generally 20,000–150,000 range
- Age Distribution: Primarily 25–54
- Gender Breakdown: Balanced male/female
- Racial/Ethnic Composition: Predominantly White with growing diversity in urban ZIPs
- Household Types: Mix of couples, young families, and singles
- Household Size: Typically 2.3–2.8
- Educational Attainment: 30–55% hold bachelor’s degree or higher
- Income Distribution: Broadly $50K–$120K
- Housing: Mixed ownership; housing values from $200K–$400K; suburban homes and urban rentals

Psychographic Segmentation
- Lifestyle Segments: “Green Acres,” “Comfortable Empty Nesters,” “Enterprising Professionals,” “Midlife Constants”
- Core Values: Sustainability, balance, health, community engagement
- Preferred Activities: Gardening, hiking, visiting farmers markets, exploring historic neighborhoods
- Media Preferences: Podcasts, online articles, YouTube, streaming TV

Consumer Behavior & Market Potential
- Shopping Habits: Eco-conscious; seek local goods and ethical brands
- Dining Preferences: Farm-to-table, local restaurants, vegetarian options
- Recreational Spending: High on parks, gear, classes, cultural travel
- Media Consumption: Digital-forward; blend of long-form and short-form content
- Health & Wellness: Focused on nutrition, yoga, preventive care
- Financial Behaviors: Online banking, moderate credit card usage, values-aligned investing
- Vehicle Preferences: Compact SUVs, hybrids, practical vehicles
- Technology Adoption: Comfortable with apps, streaming, and smart devices

Media Preferences
- Social Media: Instagram, Pinterest, Facebook
- Broadcast Media: PBS, NPR, streaming documentaries
- Print Media: Local lifestyle and environmental magazines, online news

Travel Preferences
- Likely Destinations: Mountain towns, national parks, regional nature preserves
- Accommodation Preferences: Eco-lodges, B&Bs, boutique hotels
- Transportation: Mix of car travel and short-haul flights
- Activity Preferences: Hiking, paddling, arts events, learning-based tourism
- Days Spent Traveling Annually: 3–5 trips/year, often 4–7 days

Rooted Traditionalists (Rural ZIPs)

Rooted Traditionalists represent the deeply local, rural populations of the Driftless Area—places like Mount Carroll, IL and Warren, WI. These visitors are often older adults with strong community ties, modest incomes, and a preference for traditional values. Many are long-time homeowners, married or retired, and prioritize stability, family, and regional pride. Their ZIP codes reflect smaller populations with strong agricultural or small-business economies.

They fall into lifestyle groups such as “Country Comfort” and “Rustic Living”—practical, reserved, and value-driven. Their media habits include local TV, newspapers, and Facebook. They enjoy activities tied to nature, such as fishing, hunting, fairs, or local music events. Travel for this group is practical and modest—usually regional car trips, visiting family, or enjoying simple leisure. In Iowa’s Driftless Area, they are attracted to scenic byways, antique shops, small-town museums, and local diners—places that feel familiar, comfortable, and welcoming.

Demographic Information

- Population: Small towns; <15,000 per ZIP
- Age Distribution: Skews 50+, strong Boomer and senior presence
- Gender Breakdown: Fairly even
- Racial/Ethnic Composition: Overwhelmingly White
- Household Types: Married couples, empty nesters, retirees
- Household Size: Typically 2.0–2.5
- Educational Attainment: Mostly high school, some vocational or associate degrees
- Income Distribution: $35K–$65K
- Housing: Predominantly owner-occupied, low housing costs ($120K–$200K)

Psychographic Segmentation

- Lifestyle Segments: "Rustic Living," "Heartland Communities," "Down-to-Earth"
- Core Values: Loyalty, faith, resilience, independence
- Preferred Activities: Gardening, hunting, local parades, church functions
- Media Preferences: Local radio, satellite TV, Facebook

Consumer Behavior & Market Potential

- Shopping Habits: Conservative; value-focused and local when possible
- Dining Preferences: Diners, fast food, chain restaurants
- Recreational Spending: Modest; local events, fishing gear, roadside attractions
- Media Consumption: TV, Facebook, radio; low digital usage
- Health & Wellness: Functional wellness, less focus on trends
- Financial Behaviors: Conservative savers, use local banks, low debt levels
- Vehicle Preferences: Pickup trucks, minivans, older cars
- Technology Adoption: Limited smart device usage; reliable tech over trendy

Media Preferences

- Social Media: Facebook
- Broadcast Media: Local news, agricultural/weather radio
- Print Media: Regional newspapers, hunting/fishing and gardening publications

Travel Preferences

- Likely Destinations: Small towns, state parks, county fairs
- Accommodation Preferences: Chain motels, cabins, campgrounds
- Transportation: Drive personal vehicle
- Activity Preferences: Scenic drives, local museums, family reunions
- Days Spent Traveling Annually: 1–3 trips, 2–4 days each

Lakes & Land Visitor Profile

Comfort Seekers of the Prairie (Suburban-Metro ZIPs)

The Comfort Seekers of the Prairie come from the Sioux Falls, SD metro and surrounding smaller towns like Yankton, Vermillion, and Worthington. These visitors reflect Midwestern values and a family-oriented lifestyle, often residing in owner-occupied homes in stable, middle-class neighborhoods. The median age spans a wide range—from young professionals and families to retired couples—with household incomes typically between $60K and $100K.

Education levels are moderate to high, and many are employed in healthcare, education, agriculture, or local business. Their interests include home improvement, fishing, sporting events, and road trips. This group blends digital and traditional media habits—Facebook, YouTube, local TV, and radio are common. They value convenience and comfort over flash, and brand loyalty is strong.

Their travel behavior includes short-haul regional trips in their own vehicles, preferring clean and affordable hotels, cabins, or lakeside rentals. They're drawn to water, fresh air, and active recreation—boating, biking, fishing, and community events. In Iowa's Lakes & Land region, they feel right at home enjoying the same things they do back home: scenic views, small-town friendliness, and a pace that balances exploration with relaxation.

Demographic Information

- Population: 15,000–200,000 across metro and micropolitan ZIPs
- Age Distribution: Balanced; strong 25–65+ representation
- Gender Breakdown: Fairly equal
- Racial/Ethnic Composition: Predominantly White; growing diversity in Sioux Falls, SD
- Household Types: Primarily married couples and families
- Household Size: 2.5–3.1
- Educational Attainment: 25–45% with bachelor's or higher
- Income Distribution: $60K–$100K typical range
- Housing: High homeownership; home values $200K–$350K

Psychographic Segmentation

- Lifestyle Segments: "Prairie Living," "Comfortable Country," "Middleburg," "Salt of the Earth"
- Core Values: Family, practicality, modesty, reliability
- Preferred Activities: Boating, biking, local fairs, school sports
- Media Preferences: Balanced between TV/radio and digital/social media

Consumer Behavior & Market Potential

- Shopping Habits: Practical and brand-loyal; shop at big-box and regional retailers
- Dining Preferences: Chain restaurants, local grills, regional fast casual
- Recreational Spending: Boats, outdoor gear, DIY home upgrades
- Media Consumption: Facebook, local news apps, cable TV, YouTube
- Health & Wellness: Preventive care with interest in fitness and nutrition
- Financial Behaviors: Cautious spenders; bank locally; moderate credit use
- Vehicle Preferences: Pickup trucks, crossovers, RVs
- Technology Adoption: Uses smartphones and smart TVs; less likely to adopt emerging tech early

Media Preferences

- Social Media: Facebook dominant, some YouTube and Instagram
- Broadcast Media: Local news and weather, cable networks (HGTV, sports, travel)
- Print Media: Local newspapers, regional magazines (home, outdoor life)

Travel Preferences

- Likely Destinations: Black Hills, SD; Minnesota lakes; Branson, MO; and national parks
- Accommodation Preferences: Cabins, family resorts, clean motels
- Transportation: Drive own vehicle
- Activity Preferences: Boating, fishing, biking, festivals, lakeside lounging
- Days Spent Traveling Annually: 2–4 trips/year, 3–6 days per trip

Loess Hills & Beyond Visitor Profile

Heartland Suburbanites

The Heartland Suburbanites originate from a tight geographic cluster within the Omaha, NE metro—places like Papillion, Millard, and North Omaha. These visitors are predominantly middle-income families and professionals living in well-established suburban neighborhoods. Many are homeowners with children or are empty nesters enjoying stability and familiarity. They represent a blend of working-class values and moderate affluence, with household incomes generally ranging from $60K to $110K.

Education levels are moderate—many have some college or a bachelor's degree—and they work across healthcare, logistics, education, and small business sectors. Their lives are rooted in routines that prioritize family, faith, and community, and they prefer destinations that are clean, easy to navigate, and offer wholesome recreation.

Their media use spans both traditional and digital—Facebook is ubiquitous, local TV is trusted, and YouTube is increasingly popular. They shop at major chains, value consistency, and lean toward practical spending. When visiting the Loess Hills or nearby Iowa destinations, they enjoy scenic drives, museums, wineries, community festivals, and quiet natural spaces. They're the kind of travelers who appreciate good signage, parking, and a friendly local welcome.

Demographic Information

- Population: 20,000–60,000 per ZIP; within a metro of ~500,000+
- Age Distribution: Broad spread, especially 30–65; strong family presence
- Gender Breakdown: Even male/female
- Racial/Ethnic Composition: Predominantly White, with growing Latino and Black communities
- Household Types: Married couples, families with kids, some retirees
- Household Size: 2.6–3.1
- Educational Attainment: 25–40% with bachelor's or higher
- Income Distribution: \$60K–\$110K typical
- Housing: Mostly owner-occupied single-family homes; home values ~\$200K–\$350K

Psychographic Segmentation

- Lifestyle Segments: "Middleburg," "Soccer Moms," "Rustbelt Traditions," "Family Foundations"
- Core Values: Stability, safety, family, patriotism, trust in institutions
- Preferred Activities: Youth sports, backyard BBQs, fishing, faith-based events
- Media Preferences: Facebook, local news, cable TV, AM/FM radio

Consumer Behavior & Market Potential

- Shopping Habits: Brand-loyal and convenience-focused; shop at Target, Walmart, Menards
- Dining Preferences: Chain restaurants, sports bars, casual American
- Recreational Spending: Travel, sporting gear, home goods, state park passes
- Media Consumption: Strong mix of TV, social media, streaming
- Health & Wellness: Family-oriented; interested in fitness centers and basic wellness
- Financial Behaviors: Local/regional banks, stable credit use, low-risk investors
- Vehicle Preferences: Midsize SUVs, pickups, crossovers
- Technology Adoption: Comfortable with smartphones, streaming, and online shopping; slower to adopt smart home tech

Media Preferences

- Social Media: Facebook dominates; some YouTube and TikTok use in younger households
- Broadcast Media: Local TV, cable sports/news, regional AM/FM radio
- Print Media: Sunday papers, local magazines, school newsletters

Travel Preferences

- Likely Destinations: Branson, MO; Kansas City, MO; Black Hills, SD; Okoboji, IA
- Accommodation Preferences: Clean, comfortable chains (Hampton, Holiday Inn), lakeside cabins
- Transportation: Almost exclusively drive
- Activity Preferences: State parks, wineries, museums, fairs, festivals, scenic drives
- Days Spent Traveling Annually: 2–4 trips/year, 3–5 nights each

Storied & Scenic Visitor Profiles

Midwestern Core Travelers

These visitors come from the heart of the Quad Cities region and surrounding Illinois small metros. They're regional travelers—loyal, cost-conscious, and attuned to Midwestern culture and hospitality. Most are middle-aged adults with stable careers in education, manufacturing, healthcare, or logistics. They live in modest neighborhoods, often owning single-family homes, and are deeply rooted in family and community. Household incomes typically range from \$50K to \$90K, and educational attainment is moderate.

They enjoy the familiar: fishing, grilling, car shows, and seasonal festivals. While not especially trend-driven, they value places that feel welcoming and well-organized. They rely on local TV, Facebook, and radio for news and entertainment. Their travel preferences lean toward regional road trips—visiting friends, exploring historical towns, or attending local events. Storied & Scenic destinations resonate with them because they offer exactly what they're looking for: affordability, friendliness, and a connection to heritage.

Demographic Information

- Population: 25,000–100,000 in mid-size metro ZIPs
- Age Distribution: Broad 35–70, skewing older
- Gender Breakdown: Balanced
- Racial/Ethnic Composition: Mostly White, some Latino and Black residents
- Household Types: Married couples, retirees, multigenerational households
- Household Size: 2.3–2.8
- Educational Attainment: High school and some college; ~25% bachelor's+
- Income Distribution: \$50K–\$90K
- Housing: Predominantly homeowners; \$150K–\$250K home values

Psychographic Segmentation

- Lifestyle Segments: "Rustbelt Traditions," "Down-to-Earth," "Middleburg," "Settled and Sensible"
- Core Values: Family, tradition, loyalty, routine
- Preferred Activities: Fairs, barbecues, car shows, fishing, weekend getaways
- Media Preferences: Local radio, TV, Facebook

Consumer Behavior & Market Potential

- Shopping Habits: Value-conscious; prefer Meijer, Walmart, Menards
- Dining Preferences: Family-style restaurants, buffets, fast casual
- Recreational Spending: Modest; prioritize practical leisure
- Media Consumption: Heavy on TV and radio; some digital, mostly Facebook
- Health & Wellness: Standard primary care; not trend-driven
- Financial Behaviors: Conservative spenders, avoid credit debt
- Vehicle Preferences: Trucks, minivans, sedans
- Technology Adoption: Basic smartphone use; limited smart device ownership

Media Preferences

- Social Media: Facebook
- Broadcast Media: Local news, regional AM/FM, cable
- Print Media: Local paper, city/regional magazine

Travel Preferences

- Likely Destinations: Galena, IL; Lake Geneva, WI; Branson, MO; Springfield, IL
- Accommodation Preferences: Budget hotels, lodges, cabins
- Transportation: Drive
- Activity Preferences: Antiques, museums, historic sites, fishing
- Days Spent Traveling Annually: 2–3 trips, 2–4 days

Out-of-Region Niche Visitors

These travelers hail from diverse parts of the country—urban and suburban ZIPs in Virginia, North Carolina, Utah, Michigan, and more. They are educated, affluent, and curious—often professionals or retirees with disposable income and a taste for off-the-beaten-path experiences. They are drawn to the Storied & Scenic region for its Americana charm, regional history, and riverfront ambiance.

This group represents lifestyle segments such as "Savvy Suburbanites" and "Golden Years." They are tech-literate, socially active, and interested in cultural enrichment, outdoor activities, and boutique travel. They consume media digitally—streaming news, podcasts, and curated social content—and plan travel through TripAdvisor, travel blogs, and social recommendations.

They often fly or drive long distances, staying in boutique hotels or upscale inns. In Iowa, they're intrigued by the unexpected: riverboat history, Scandinavian heritage, farm-to-table food, and quaint towns. They are less frequent but higher-spending visitors who help elevate the region's visibility beyond its core drive markets.

Demographic Information

- Population: Large suburban or small urban centers (25K–150K)
- Age Distribution: Mostly 35–65+, some retirees
- Gender Breakdown: Balanced
- Racial/Ethnic Composition: Diverse—includes White, Black, Asian, Latino populations
- Household Types: Couples, DINKs, retirees
- Household Size: 2.0–2.6
- Educational Attainment: 40–70% with bachelor's or higher
- Income Distribution: $80K–$150K+
- Housing: Homeowners in $300K–$600K homes; some high-end rentals

Psychographic Segmentation

- Lifestyle Segments: "Savvy Suburbanites," "Golden Years," "Professional Pride," "Pleasantville"
- Core Values: Cultural curiosity, quality of life, learning, civic pride
- Preferred Activities: Art galleries, culinary events, historical tours, biking
- Media Preferences: Streaming content, travel blogs, podcasts

Consumer Behavior & Market Potential

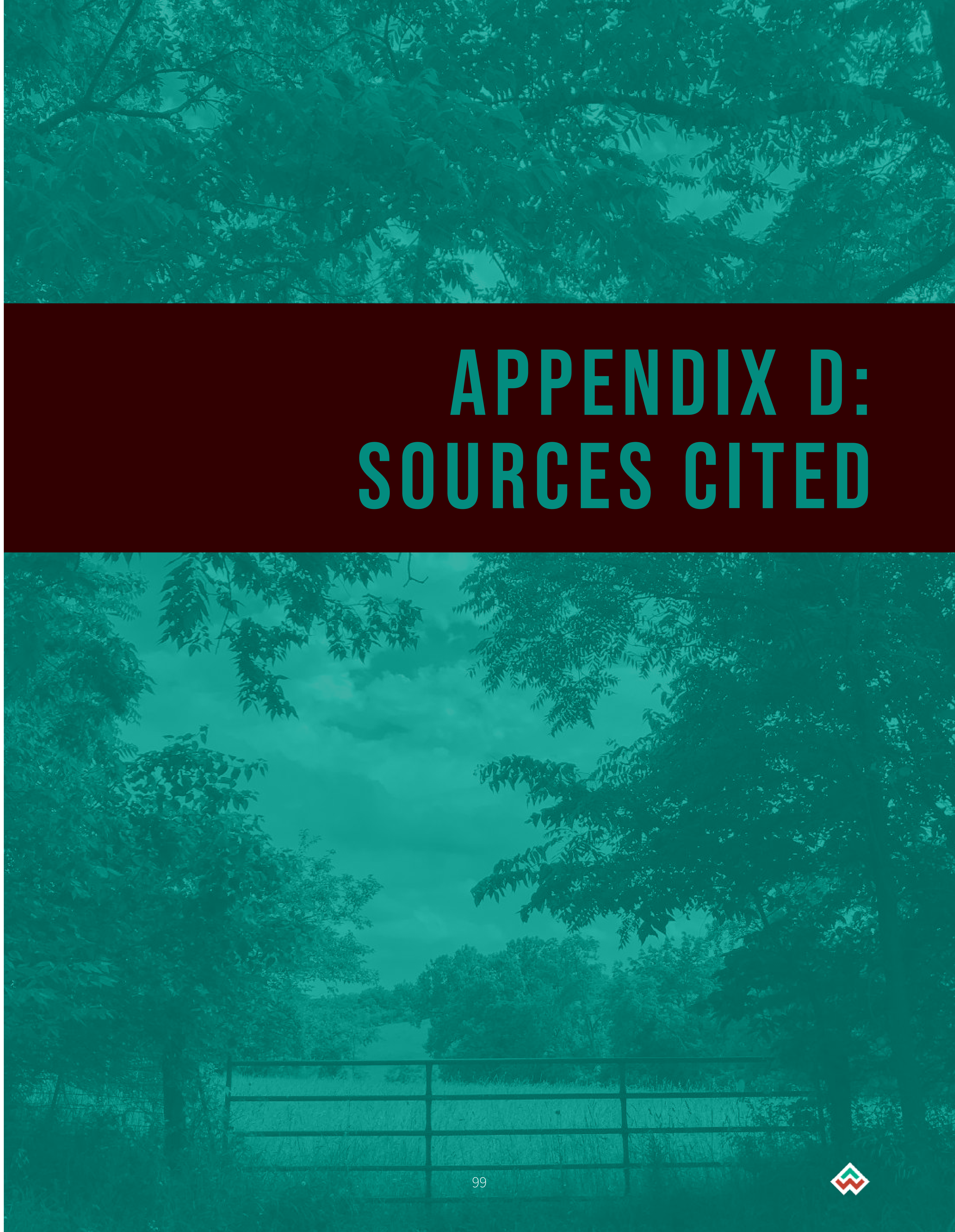
- Shopping Habits: Premium but value-conscious; shop online and at Whole Foods, Target
- Dining Preferences: Upscale casual, locally sourced, diverse cuisines
- Recreational Spending: High—travel, gear, classes, boutique events
- Media Consumption: Digital-first; streaming TV, YouTube, niche platforms
- Health & Wellness: Invested in fitness, supplements, organic food
- Financial Behaviors: Tech-savvy banking, investment apps
- Vehicle Preferences: Hybrids, midsize SUVs, crossovers
- Technology Adoption: High; smart homes, streaming, wearables

Media Preferences

- Social Media: Instagram, YouTube, Reddit, Facebook (light use)
- Broadcast Media: Streaming (Netflix, Hulu), podcasts, NPR
- Print Media: NYT, specialty travel magazines, Substack newsletters

Travel Preferences

- Likely Destinations: Hudson Valley, NY; Asheville, NC; Santa Fe, NM; Oregon coast
- Accommodation Preferences: Boutique inns, stylish Airbnbs, historic hotels
- Transportation: Mix of flying and long-distance road trips
- Activity Preferences: Culinary tours, scenic hikes, live music, heritage trails
- Days Spent Traveling Annually: 3–6 trips/year, 4–8 days each



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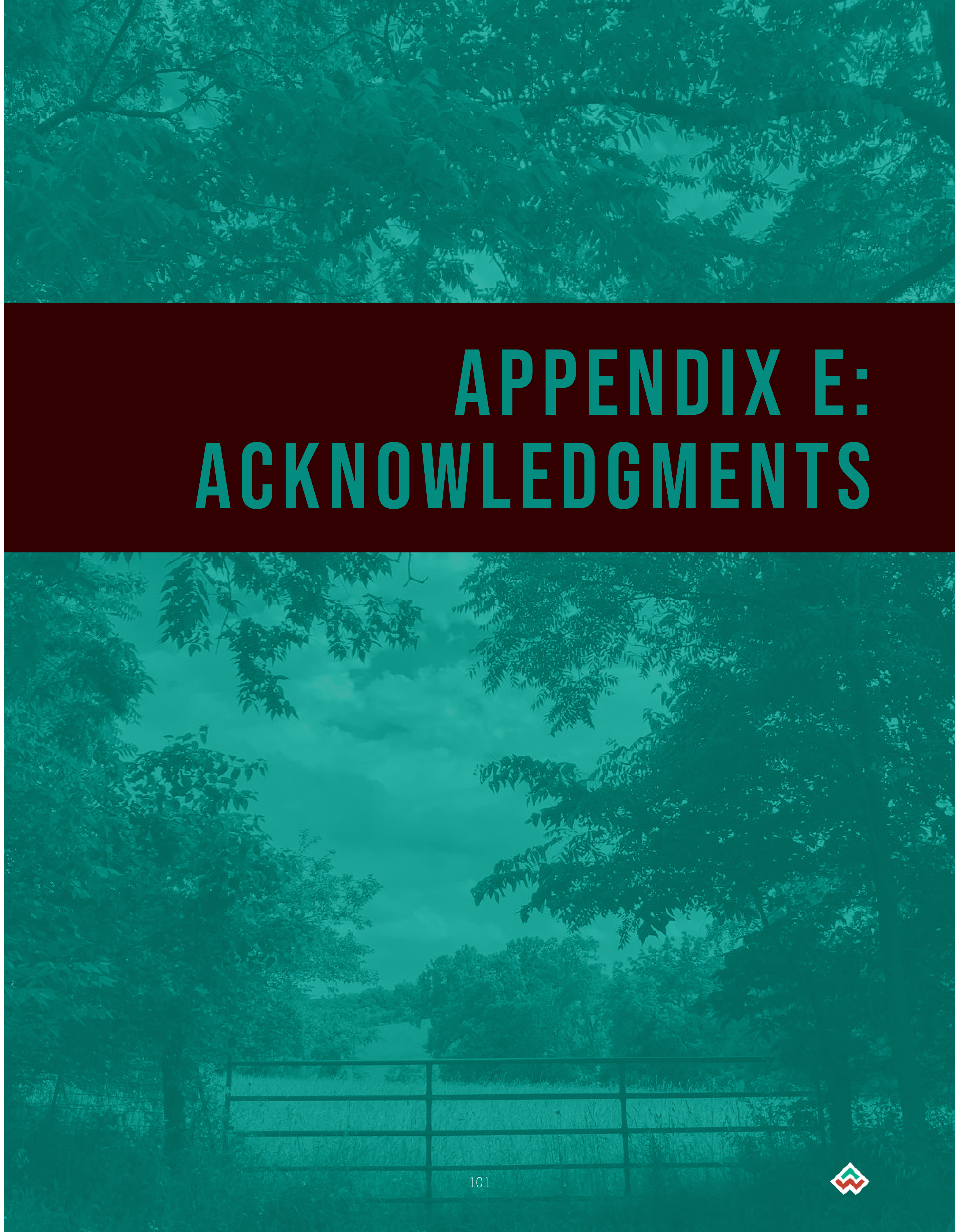
   b. ZIP-Codes.com
10. Destination Analysts
    a. Traveler Sentiment & Behavior Reports



APPENDIX E: ACKNOWLEDGMENTS

ACKNOWLEDGMENTS

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WHEREABOUT