



1



2

## Research Audience Perceptions and Motivations Related to Iowa

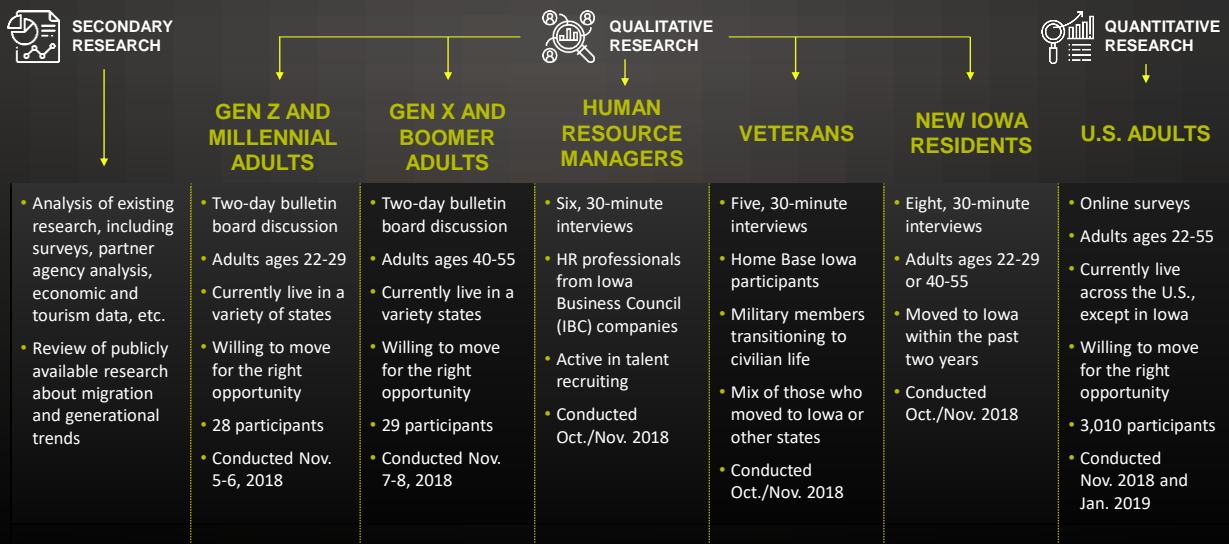
Understand how Iowa is perceived today and the factors that motivate individuals to visit and move, such as:

- Attributes of the ideal place to visit and live
- Motivations to consider moving to a new state
- Concerns with moving to a new state
- Benefits and drawbacks of living in Iowa
- Impact of facts about Iowa
- Communication channels that most influence perceptions

3

3

## Research Process



4

4



5

## Access to Natural Landscapes and Outdoor Activities are Important

When describing their ideal vacation destination and place to live, adults consistently cite outdoor activities and scenery

Other attributes associated with ideal places to visit and live include:

- Relaxing atmosphere with access to adventure
- Culture and arts, including community festivals and events
- Quality restaurants
- Public transportation
- Economic growth and job availability

*"The area is beautiful and it's nice to disconnect for a while. We love just sitting on the beach and having morning coffee, paddle boarding and just literally taking things slow with no schedule."*

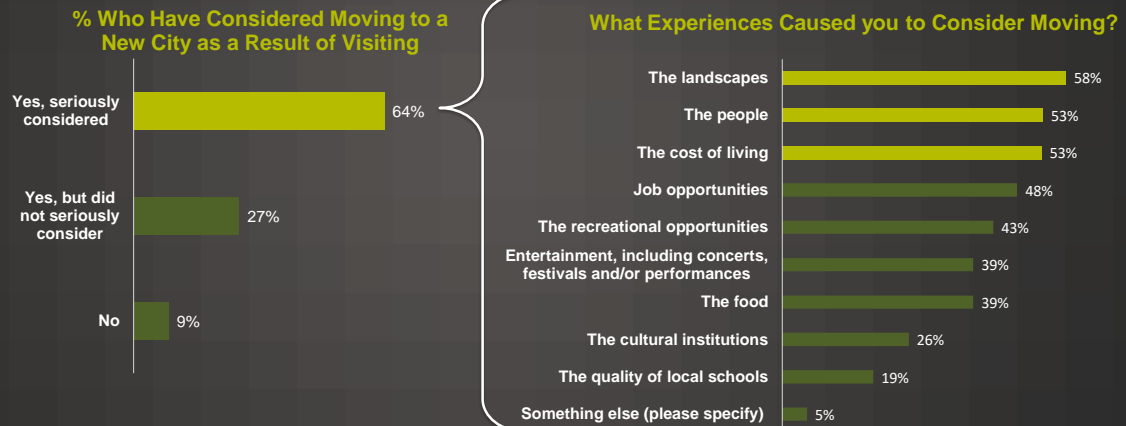
*"Our tour guides aimed to give us the "authentic" experience. We were eating lunch and resting at a small cafe and I was reading the local paper."*

*"It was great to get a dose of nostalgia for me and to see him experience somewhere brand new. And because we road tripped there it was very affordable."*

6

6

## Travel is the First Step in Thinking About Moving to a New City



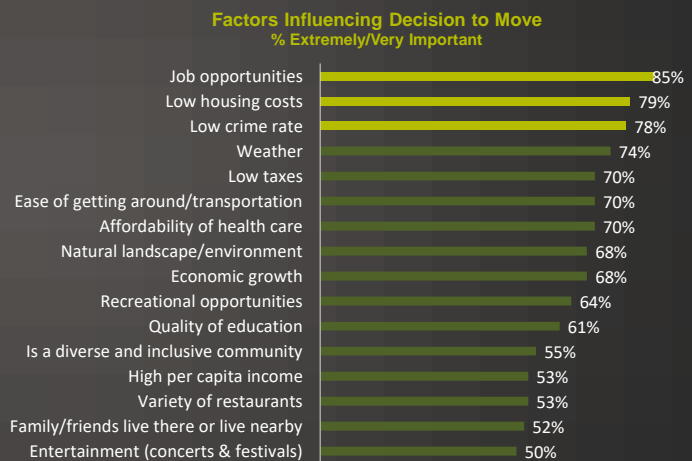
7

## Travel Increases Interest, but Job Opportunities Motivate Moves

*"My ideal place to move would offer great jobs, lots of culture, a reasonable amount of outdoor activities and be within a few hours flight from my family."*

*Some of the cities I've considered moving to don't have the best cost of living, which is why I haven't made the move."*

**22-29 YRO**



8

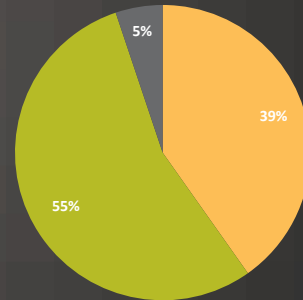
8

## Perceptions of Iowa are Outdated, but Neutral

MIDWEST VALUES  
 ROLLING HILLS BORING  
 COUNTRY  
 CORN NOTHING TO DO  
 LACK OF DIVERSITY  
 FLYOVER STATE SLOW PACE OF LIFE

### PERCEPTIONS OF IOWA

Positive Neutral/Not Sure Negative

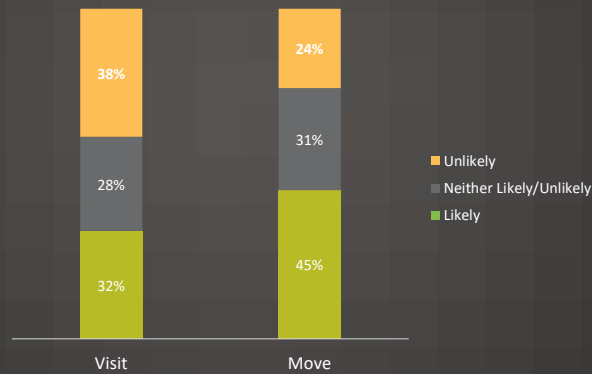


9

9

## As a Result, Only a Minority are Likely to Visit or Move to Iowa in the Future

### Likelihood of Visiting/Moving



10

10

## Iowa Isn't Associated with What People Need to Move – Particularly Jobs

### TOP FIVE FACTORS INFLUENCING A DECISION TO MOVE

### PERCEIVED BENEFIT OF LIVING IN IOWA

Job Opportunities



Natural Landscapes



Cost of Living/Housing Costs



Recreational Opportunities



Low Crime Rate



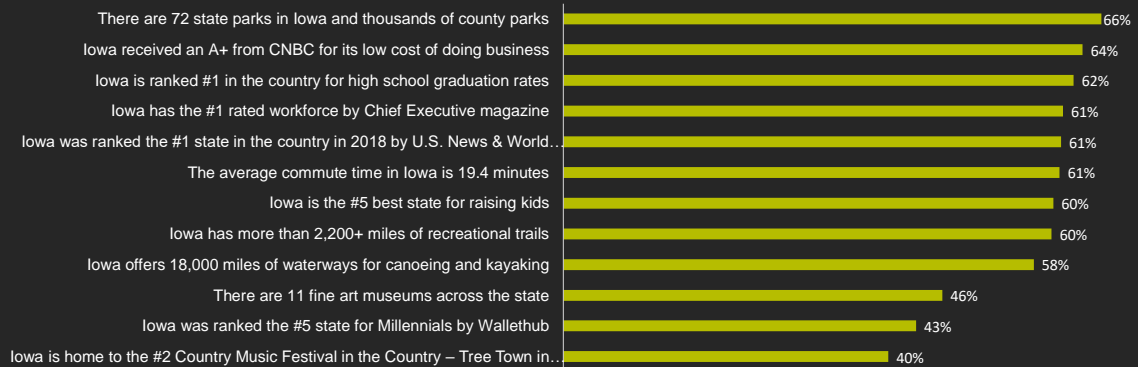
11

11

## But Perceptions Can be Changed

### Impact of Facts About Iowa on Perceptions

*% Rated as Making Iowa More Desirable*



12

12





13

## Reaching 22-29 Year Olds

### WHAT WE KNOW

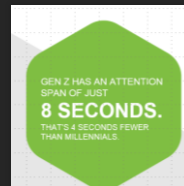
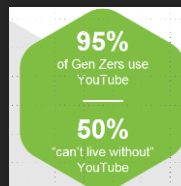
- Most open and willing to move
- Expect to move to find a new job and/or advance in their careers
- Eager to experience new places

### GEN Z/MILLENNIAL VALUES

- |                         |                                    |
|-------------------------|------------------------------------|
| ○ Diverse               | ○ Financially conscious            |
| ○ Now focused           | ○ Reject norms                     |
| ○ Realists              | ○ Tech innate                      |
| ○ Optimists             | ○ Multiple screens                 |
| ○ Self-directed         | ○ Communicate with images and text |
| ○ Want to be discovered | ○ Transparency                     |
| ○ Globally minded       |                                    |

### HOW WE REACH THEM

- Messages about job opportunities, followed by recreation and entertainment
- Social channels
- Hearing from real people who have moved to or visited Iowa
- Video content



**63.3%** Watch Video on Smart  
Phones +3 days per week  
Avg. 40 minutes/day

14

14

## Reaching 30-39 Year Olds

### WHAT WE KNOW

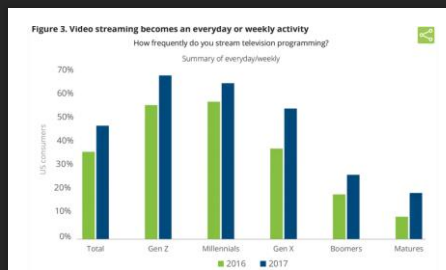
- Eager to find a great place to raise a family
- Seeking work/life balance
- Digital media behavior of younger generations
- Still enjoy traditional media (e.g., radio, TV and newspapers), but quick to adopt new media
- More connected to social (spend avg. of nearly 7 hrs./week – more than younger generations)

### MILLENNIAL/GEN X VALUES

- Tech savvy
- 2 screens
- Text users
- Transparency
- Share all!
- Middle child
- Forgotten generation
- Flexible
- Family focused
- Ambitious
- Work to live

### HOW WE REACH THEM

- Messages about job opportunities, cost of living, education systems and low taxes
- Social channels
- Hearing from real people who have moved to or visited Iowa
- Video content



15

15

## Reaching 40-55 Year Olds

### WHAT WE KNOW

- Most likely to visit Iowa and have a positive view
- Higher disposable income and able to travel
- Motivated to move by lower cost of living
- Young boomers expect to delay retirement
- Research and trust their peers, friends and relatives the most

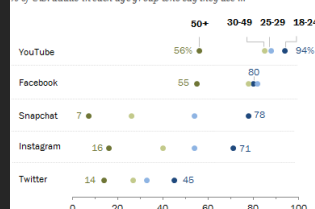
### GEN X/BOOMER VALUES

- Middle child
- Forgotten generation
- Flexible
- Family focused
- Ambitious
- Work to live
- Health
- Comfort
- Confidence
- Optimism
- Redefining aging
- Trust

### HOW WE REACH THEM

- Messages about job opportunities, cost of living and affordability of health care
- Traditional and social channels
- Hearing from real people who have moved to or visited Iowa
- Printed materials (e.g., guidebook)

**Social platforms like Snapchat and Instagram are especially popular among those ages 18 to 24**  
% of U.S. adults in each age group who say they use ...



Source: Survey conducted Jan. 3-10, 2018.  
Social Media Use in 2018  
PEW RESEARCH CENTER

16

16





17

---

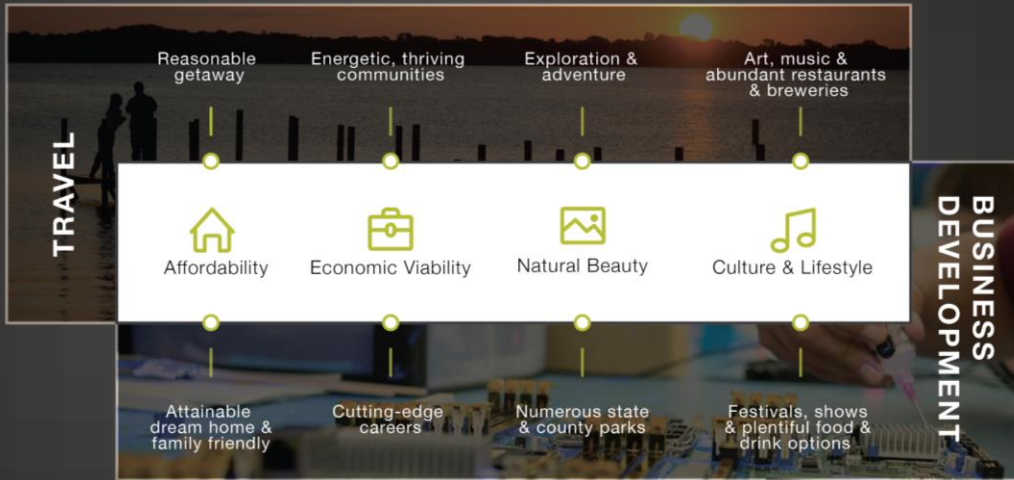
***The right tone and messages can shift adults' perceptions of Iowa, increasing the possibility of visiting or moving to state.***

---

18

18

## Key Message Pillars



19

19

### INSIGHT

### MY PERCEPTION IS MY REALITY

### WHAT WE WANT THEM TO BELIEVE

Iowa is more than meets the eye

### IMAGINE IF WE COULD

Reveal the real Iowa

### MAGNETIC IDEA

Change their vantage point so they can see the whole picture Iowa has to offer

20

20



## Strong Visuals and Headlines Resonate

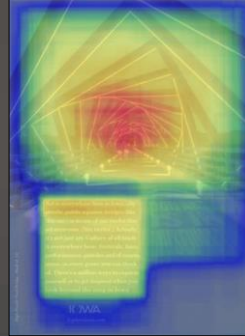
**CONCEPT 1**



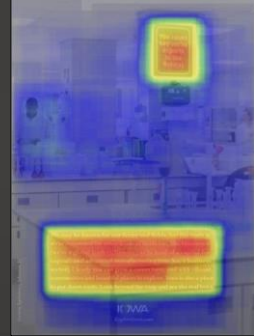
**CONCEPT 2**



**CONCEPT 3**



**CONCEPT 4**



**Legend:** Not Selected Most Selected

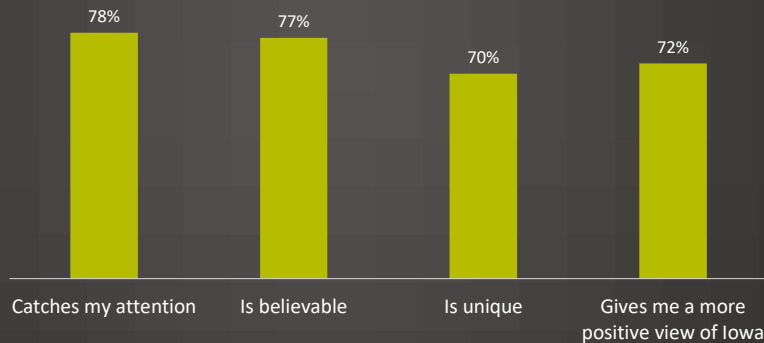
\*Heat maps are created with a computer algorithm through the Decipher surveying software. The algorithm assigns a color grade to numerical values and then tabulates how frequently a survey taker clicks on a given place. The heat map is automatically generated through the color coding system; N=752

23

23

## All Four Concepts Catch Attention AND Improve Impressions

Collective Creative Concept Performance  
Average Ratings



Q9. How much do you agree or disagree that the advertisement you just viewed accomplishes each of the following? N=752

24

24

## Concepts Successfully Communicate Desired Messages and Challenge Misperceptions

### Surprises about Iowa



*"I really didn't know anything other than growing corn happened there. It appears to have a lot of outdoor things to do."*

*"Low cost of living and career opportunities."*

*"I was surprised to learn how cheap the cost of living in Iowa is."*




*"I'm pleased with the houses and artwork. The area seems more modernized than I thought."*

Q22. Thinking about everything you've seen and read about Iowa, what were you most pleasantly surprised to learn about Iowa?  
Total N=752, 22-29=248, 30-39=248, 40-55=256

25

25

## Perceptions of Iowa Shift Positively as a Result of Messages and Creative Concepts

	PRE-CREATIVE AD TESTING	↑	POST-CREATIVE AD TESTING
 Consider <b>moving</b> to Iowa	50%	<b>26%</b>	63%
 Consider <b>visiting</b> Iowa	38%	<b>87%</b>	71%
 Has a <b>positive view</b> of Iowa	37%	<b>132%</b>	86%

26

26



## Communications Program-at-a-Glance

<b>CONSUMER AUDIENCE OBJECTIVE</b>	Increase awareness and consideration of Iowa's benefits as a place to visit, live and work					
<b>STRATEGY #1</b>	Showcase Iowa is more than meets the eye through unexpected stories					
<b>STRATEGY #2</b>	Launch campaigns that encourage exploration of the state					
<b>TACTICS</b>	Buzz	Influencers	Social Media	Advertising	Media Relations	Digital
<b>FOUNDATION</b>	Planning * Creative * Research * Measurement * Content					

27

27

## Where You'll Find Our Messages

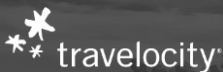


Parents



BuzzFeed

pandora®



★ StarTribune

travelspike

Uber



tripadvisor

Roadtrippers

Omaha World-Herald

trivago®



Midwest Living

SHAPE



lyft

28

28



## Next Steps



Refine creative based on feedback from consumer testing



Share research results with stakeholder audiences and partners (e.g., Professional Developers of Iowa, Tourism Conference, Iowa Business Council, etc.)



Roll-out new campaign creative in April with media, influencer and buzz-generating tactics

