

DESTINATION

NEXT

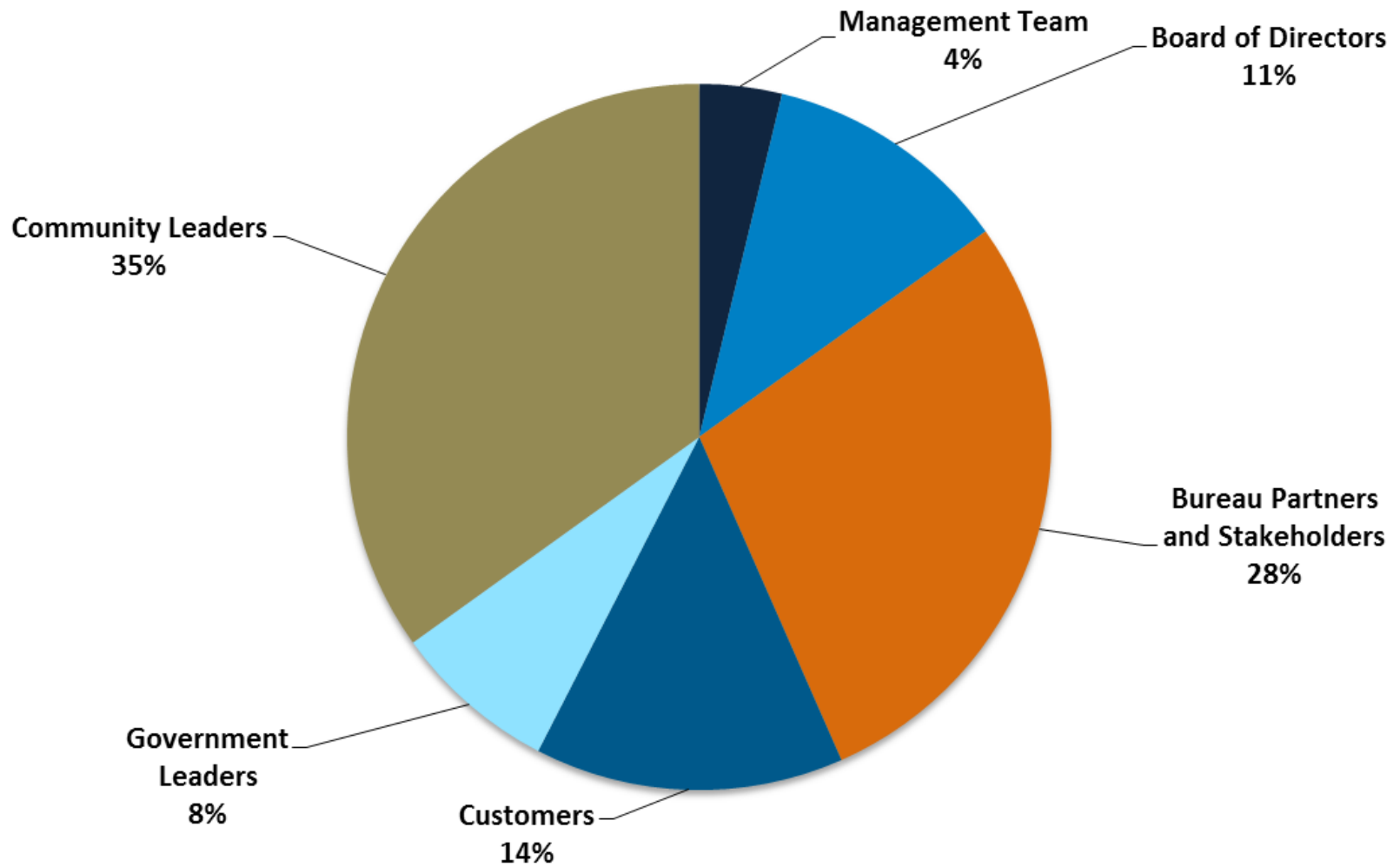
Multi-User Online Diagnostic Tool Results: **Pikes Peak Region**



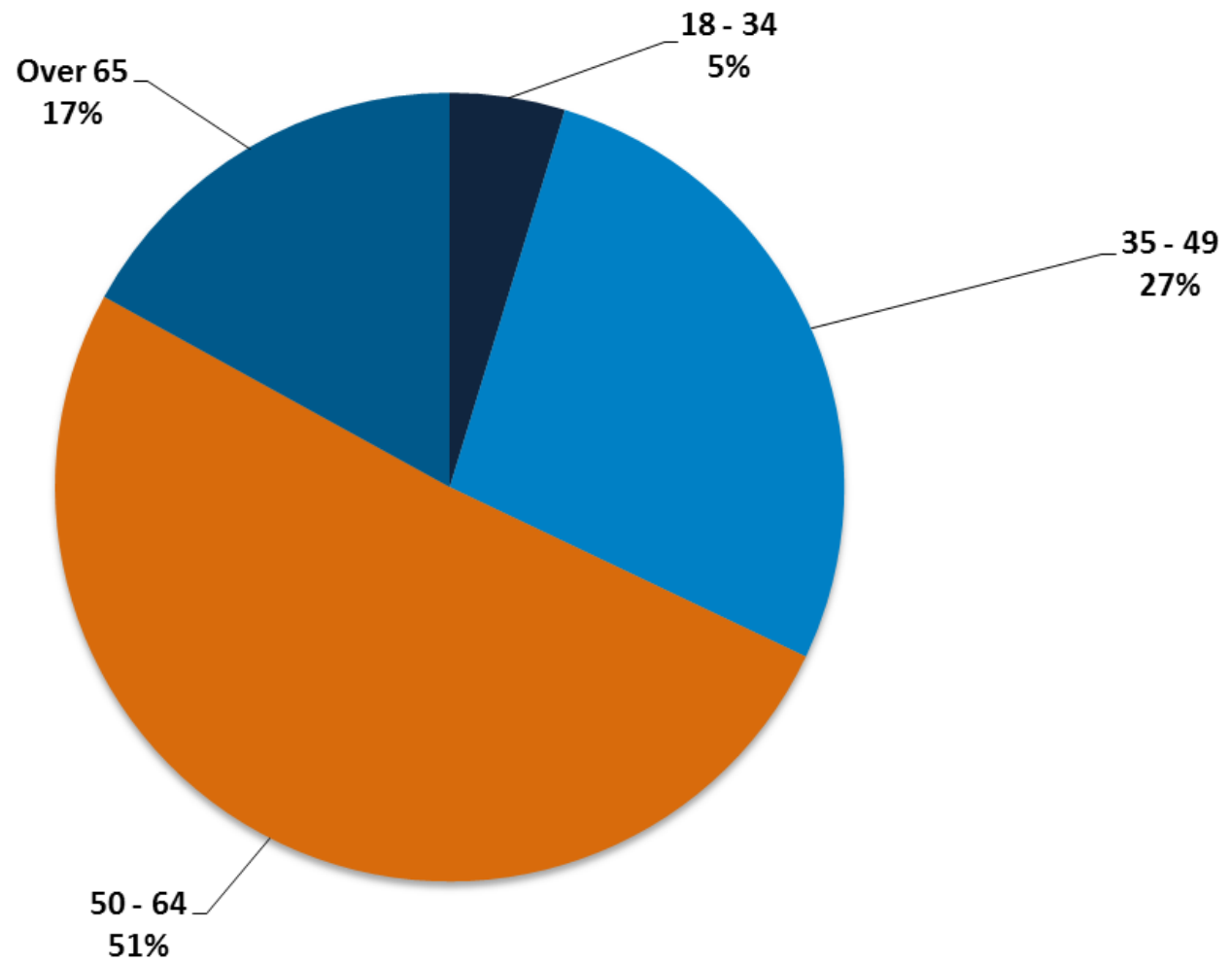
Colorado Springs Convention & Visitors Bureau

August 26, 2016

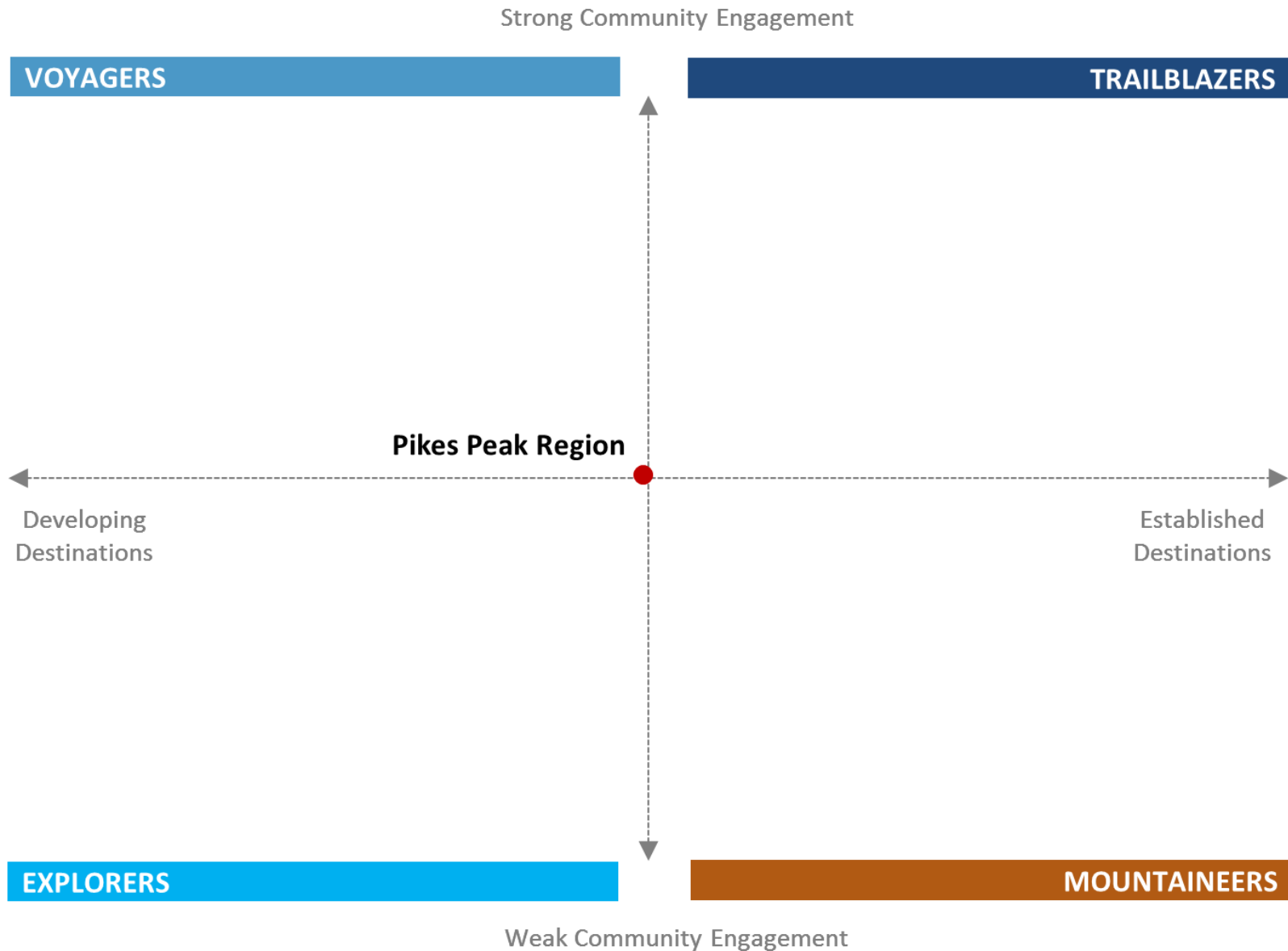
106 Responses



Age Demographic



Pikes Peak Region Overall Assessment - Industry

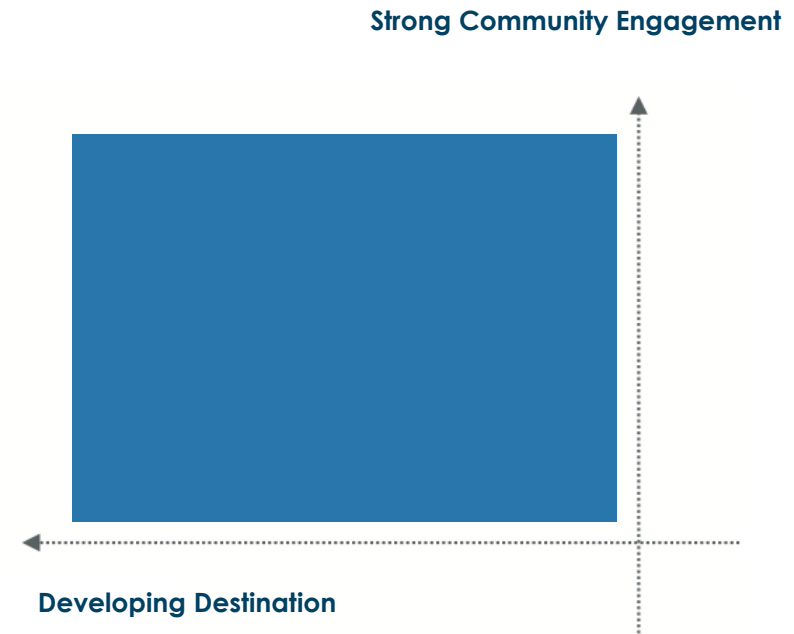


Voyagers

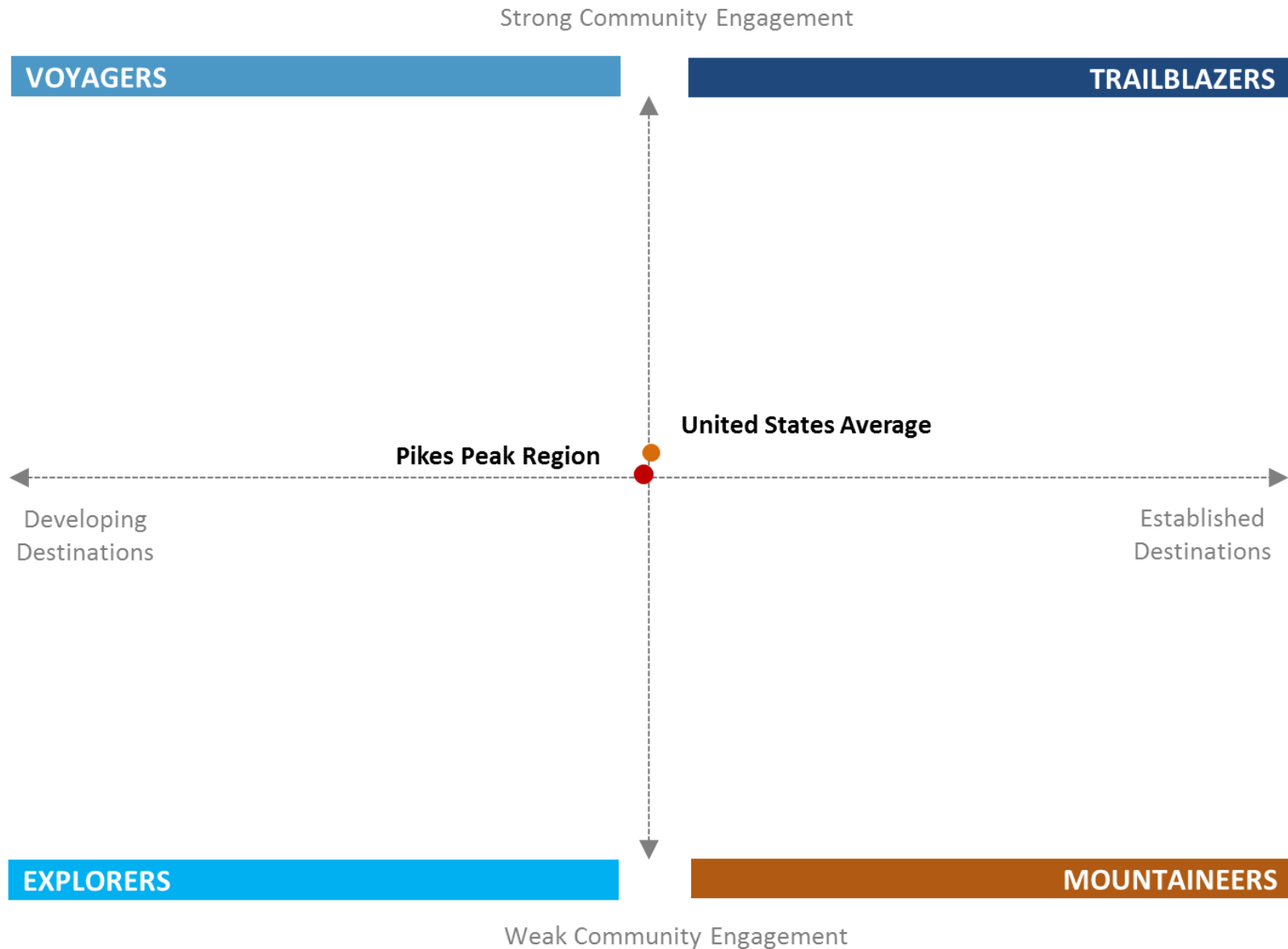
These DMO's and destinations have a tourism vision and a community mandate to get it done.

Key Strategic Challenges

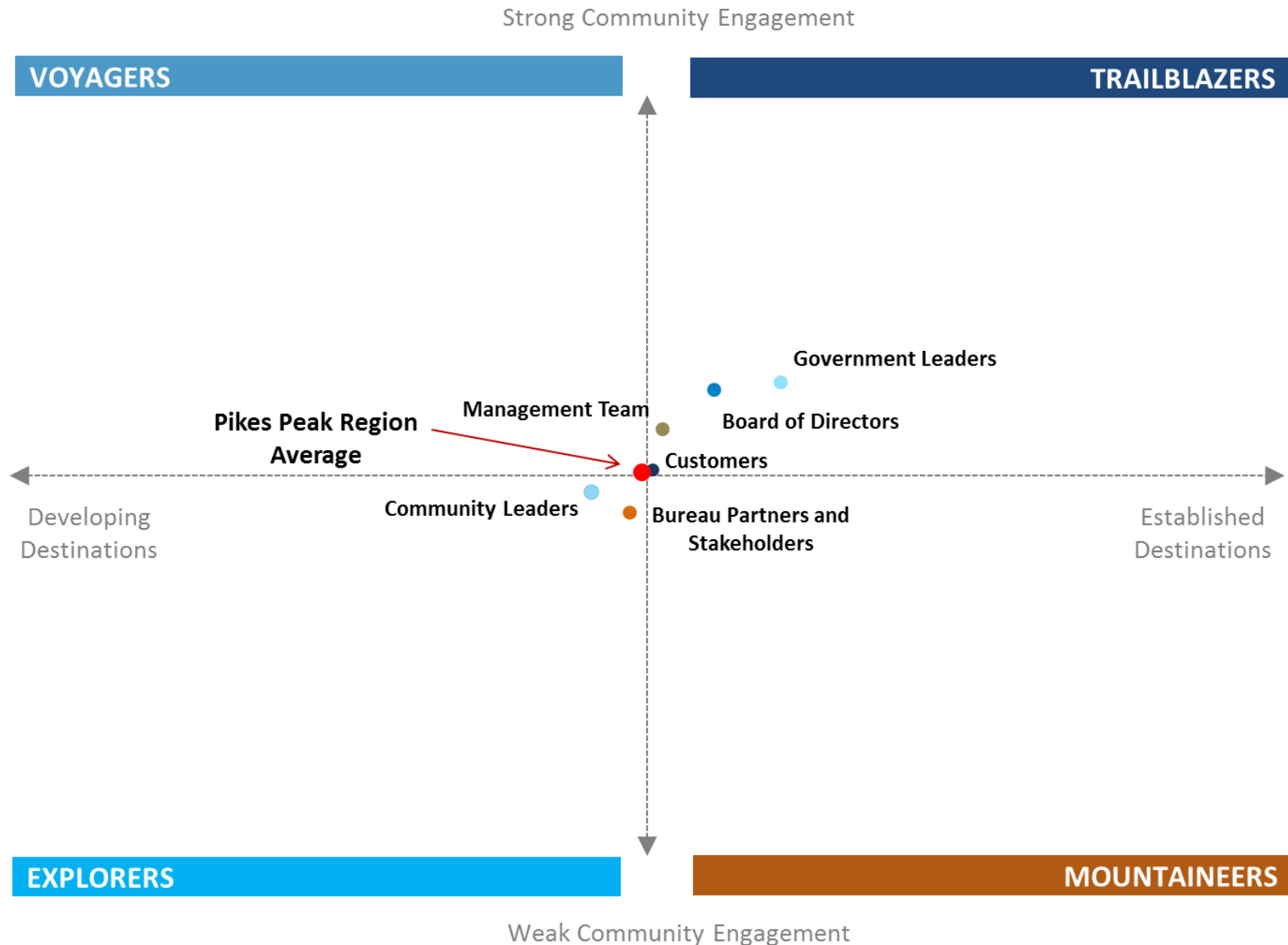
- Maintaining momentum over time required to implement strategy
- Making prioritized choices for focused action; avoiding the temptation to be all things to all people
- Establishing destination marketplace credibility; delivering on brand promises for target market segments



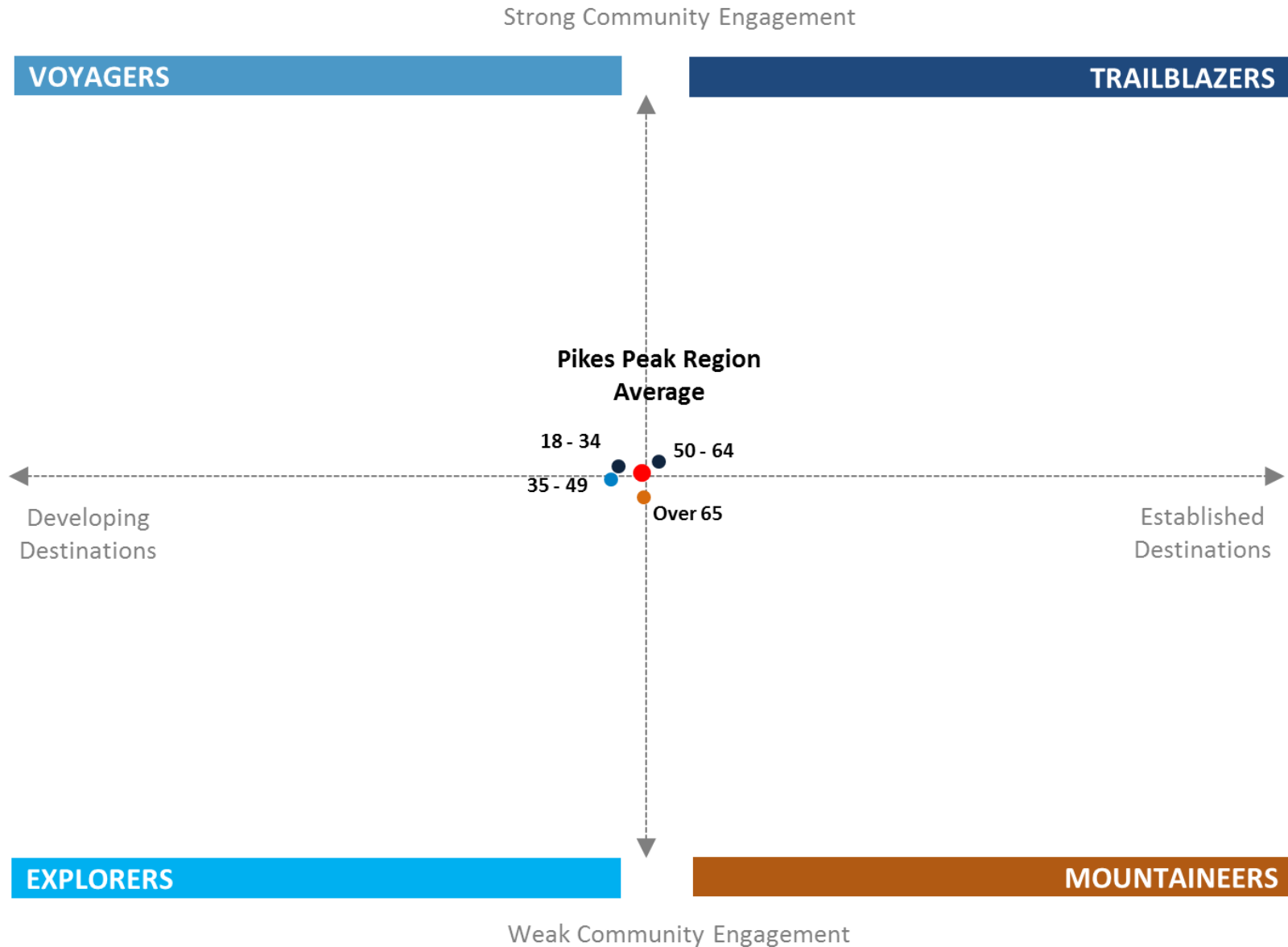
Pikes Peak Region Overall Assessment - Country



Pikes Peak Region Overall Assessment - Stakeholder



Pikes Peak Region Overall Assessment – Age Group



Destination Strength Rankings - Industry



Relative Importance

Perceived Performance



Brand

1st

7th



Destination
Performance

2nd

1st



Attractions and
Entertainment

3rd

3rd



Accommodation

4th

4th

Destination Strength Rankings – Pikes Peak Region



Relative Importance

Perceived Performance



Attractions &
Entertainment

1st

2nd



Air Access

2nd

6th



Accommodation

3rd

3rd



Brand

4th

4th

Destination Strength: Relative Importance

Variable	Relative Importance (0-100%)		
	Industry Average	Pikes Peak Region Average	Standard Deviation
Attractions & Entertainment	12%	10.8%	1%
Air Access	9%	10.4%	1%
Accommodation	12%	10.3%	1%
Brand	13%	10.3%	1%
Communication & Internet Infrastructure	7%	10.0%	1%
Destination Performance	12%	10.0%	2%
Convention & Meeting Facilities	10%	9.8%	1%
Mobility & Access	7%	9.6%	1%
Events	9%	9.6%	1%
Sports & Recreation Facilities	9%	9.3%	1%

Destination Strength: Report Card

Variable	Relative Importance (0-100%)			Perceived Performance (1-5 scale)		
	Industry Average	Pikes Peak Region Average	Standard Deviation	Industry Average	Pikes Peak Region Average	Standard Deviation
Attractions & Entertainment	12%	10.8%	1%	3.68	4.00	0.52
Air Access	9%	10.4%	1%	2.90	3.27	0.66
Accommodation	12%	10.3%	1%	3.42	3.89	0.74
Brand	13%	10.3%	1%	3.21	3.79	0.54
Communication & Internet Infrastructure	7%	10.0%	1%	3.32	3.23	0.73
Destination Performance	12%	10.0%	2%	3.83	4.00	0.64
Convention & Meeting Facilities	10%	9.8%	1%	3.12	2.99	0.76
Mobility & Access	7%	9.6%	1%	3.04	2.96	0.68
Events	9%	9.6%	1%	3.73	3.61	0.59
Sports & Recreation Facilities	9%	9.3%	1%	3.32	2.94	0.76

DESTINATION STRENGTH - Pikes Peak Region	3.47
INDUSTRY AVERAGE DESTINATION STRENGTH	3.49

RESULTING SCENARIO	VOYAGERS
---------------------------	-----------------

Destination Strength: Report Card – Stakeholder Group

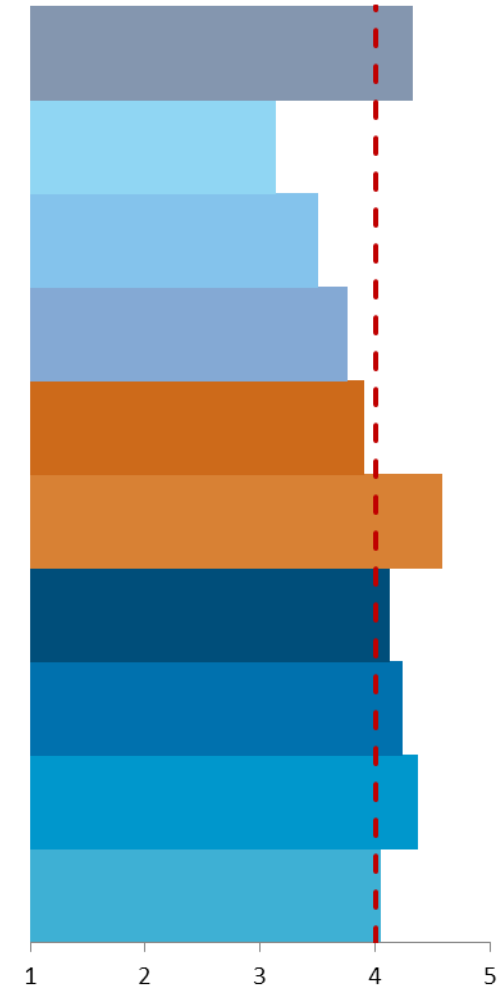
Variable	Perceived Performance (1-5 scale)						
	Pikes Peak Region Average	Management Team	Board of Directors	Bureau Partners and Stakeholders	Customers	Government Leaders	Community Leaders
Attractions & Entertainment	4.00	4.43	4.14	3.91	3.94	4.38	3.93
Air Access	3.27	3.25	3.27	3.10	3.09	4.10	3.30
Accommodation	3.89	4.25	4.11	3.87	4.09	4.25	3.64
Brand	3.79	3.92	3.99	3.78	3.82	4.05	3.66
Communication & Internet Infrastructure	3.23	3.08	3.53	3.24	3.48	3.27	3.05
Destination Performance	4.00	4.35	4.57	3.84	3.89	4.40	3.87
Convention & Meeting Facilities	2.99	3.05	3.33	2.95	3.10	3.57	2.73
Mobility & Access	2.96	2.68	2.92	2.97	3.26	3.54	2.75
Events	3.61	3.50	3.72	3.48	3.53	4.23	3.59
Sports & Recreation Facilities	2.94	2.67	3.19	3.09	2.93	3.21	2.70
# of Participants		4	12	30	15	8	37
DESTINATION STRENGTH							3.47
INDUSTRY AVERAGE DESTINATION STRENGTH							3.49

RESULTING SCENARIO

VOYAGERS

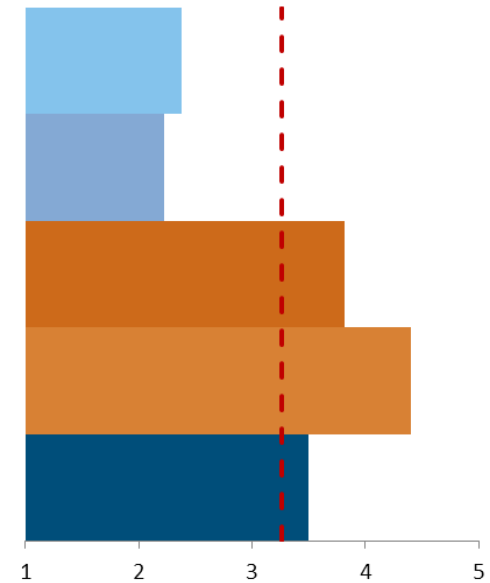
Attractions & Entertainment

- Authentic and unique attractions and entertainment opportunities
- Downtown areas offers diverse and high-quality shopping opportunities
- Region offers diverse and high-quality shopping opportunities
- Unique and high-quality dining options
- High-quality and wide-ranging arts and cultural attractions
- Wide diversity of parks and bike trails
- Large, famous attractions that cause people to stay
- Pike's Peak supports the Region's brand
- Garden of the Gods supports the Region's brand
- Royal Gorge Bridge & Park supports the Region's brand



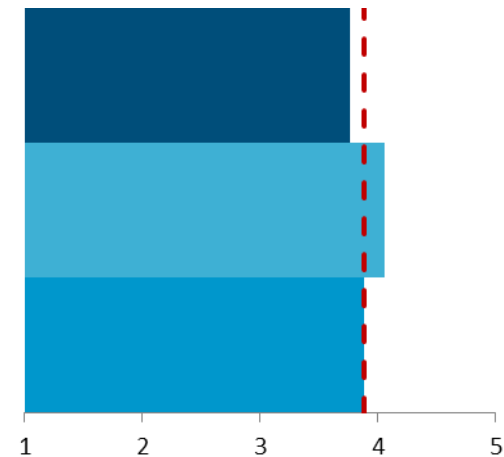
Air Access

- Domestic air access in terms of number of flights and capacity
- Domestic air access in terms of range of carriers and low-cost options
- Airport is a state-of-the-art facility with capacity to grow
- Airport provides efficient parking, ticketing, security screening, and access to gates
- Airport offers a true destination "sense of place"



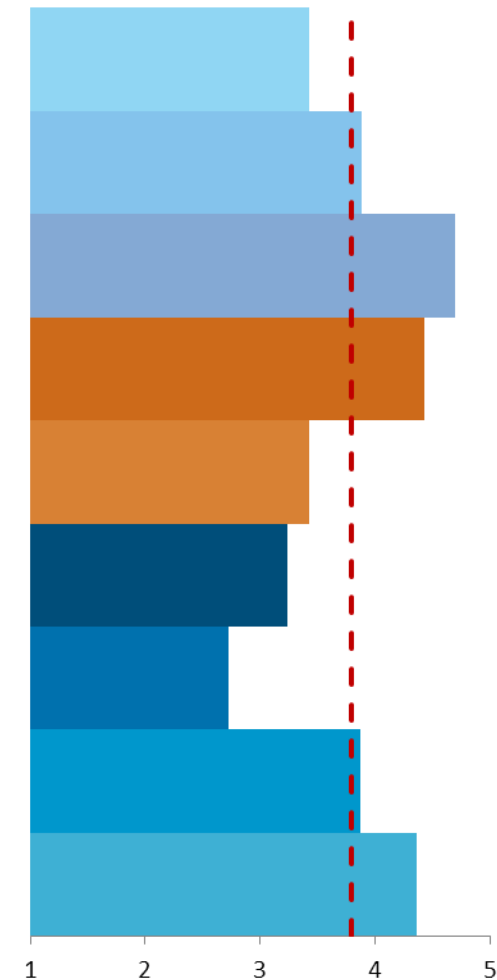
Accommodation

- Adequate accommodations capacity
- Diversity of accommodation price options
- Location of accommodation options meets visitor needs



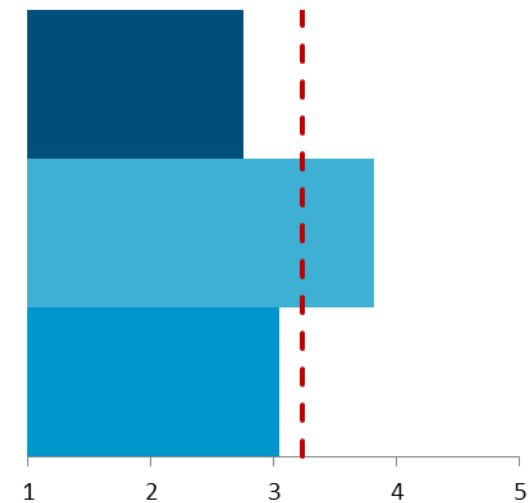
Brand

- Established brand that is simple, memorable, and market-tested
- Known for being safe, clean, and secure for visitors
- Known as being healthy and an outdoor, active city
- Known for having a lot of things to see and do
- Known as an environmentally conscious and sustainable destination
- Known as a high-tech, innovative city
- Prepared to become an international tourism destination
- Appeals to a wide range of visitors
- Main icon is Pikes Peak



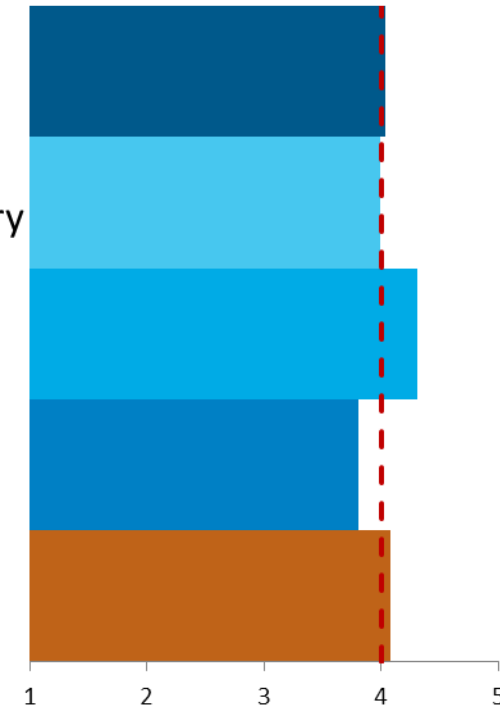
Communication & Internet Infrastructure

- Wi-Fi in outdoor/public areas with high visitor traffic
- Industry uses and leverages social media to support the brand
- Mobile and Internet coverage/availability



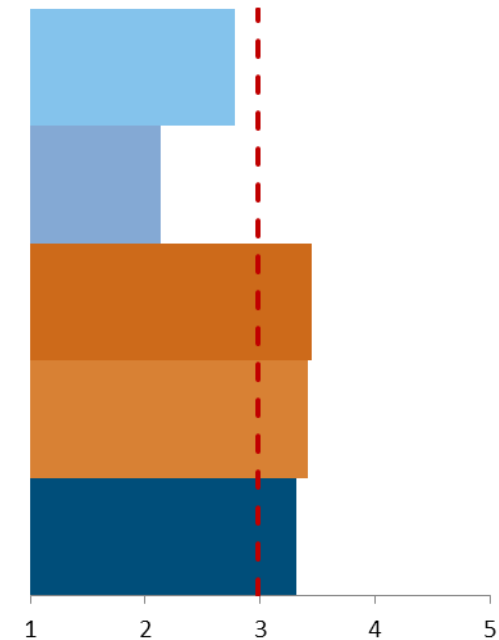
Destination Performance

- Adequately measures and tracks the performance of our tourism industry
- Communicating the performance and economic impact of our tourism industry
- Positive growth in overnight visitation
- Successfully converting leads for meetings and conventions
- Hotels are performing well (e.g. Occupancy)



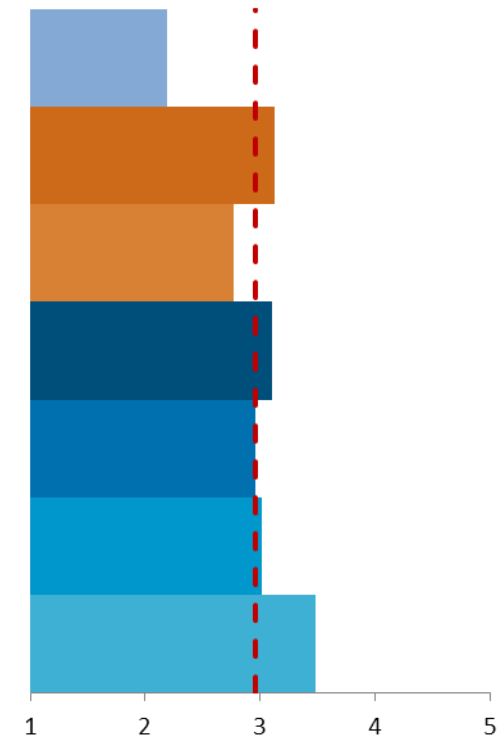
Convention & Meeting Facilities

- Necessary facilities to compete today
- Necessary facilities to compete for the next 25 years
- Good, unique off-site venues for special events
- Hotels/meeting venues take full advantage of the views
- Abundance of professional and experienced convention services suppliers



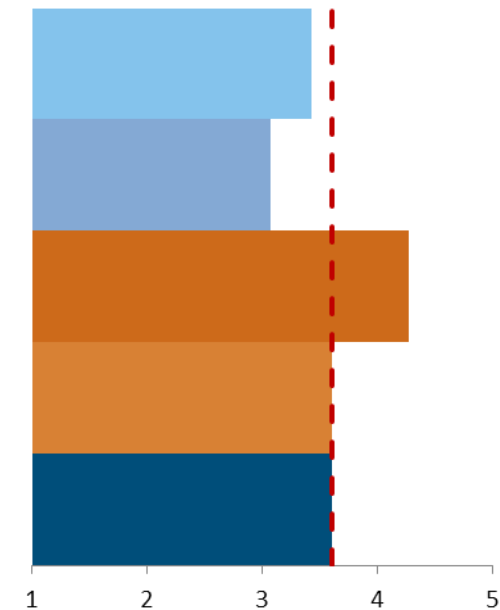
Mobility & Access

- Adequate public transportation
- Great directional signage and wayfinding
- Good quality roads that can easily handle traffic
- Bicycle-friendly city with easy, well-marked bike routes
- Good access and services for those with disabilities
- Known as a walkable region
- Known as a bikeable region



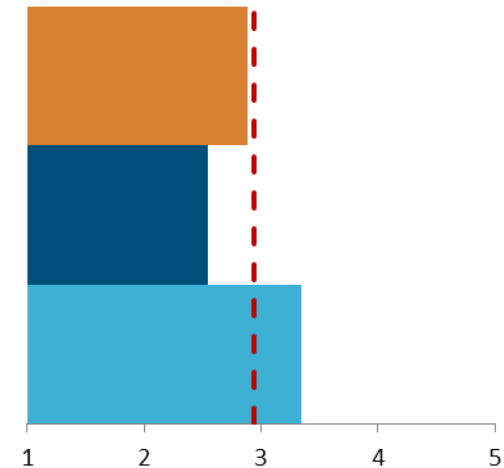
Events

- Offers a year-long series of major events that drive economic impact
- Diverse facilities/venues with capacity and availability
- Abundance of parks and outdoor spaces for handling special events
- County and municipal government is cooperative and supportive
- Citizens are supportive of hosting major national or international events



Sports & Recreation Facilities

- Sports fields to host major amateur and collegiate sporting events
- Venues to host major professional sporting events
- Local sports leadership are engaged in pursuing sporting events



Community Support & Engagement - Industry



Relative Importance

Perceived Performance



Funding Support
and Certainty

1st

10th



Industry Support

2nd

3rd



Effective DMO
Governance Model

3rd

2nd



Local Community
Support

4th

4th

Community Support & Engagement Ranking Pikes Peak Region



Relative Importance

Perceived Performance



Regional
Cooperation

1st

3rd



Funding Support &
Certainty

2nd

10th



Local Community
Support

3rd

7th



Effective Advocacy
Program

4th

5th

Community Support & Engagement: Relative Importance

Variable	Relative Importance (0-100%)		
	Industry Average	Pikes Peak Region Average	Standard Deviation
Regional Cooperation	9%	10.3%	1%
Funding Support & Certainty	13%	10.2%	1%
Local Community Support	11%	10.1%	1%
Effective Advocacy Program	9%	10.1%	1%
Economic Development	9%	10.1%	1%
Industry Support	12%	10.1%	1%
Hospitality Culture	10%	10.0%	1%
Membership Strength & Support	7%	9.9%	1%
Workforce	9%	9.9%	1%
Effective DMO Governance Model	11%	9.3%	2%

Community Support & Engagement: Report Card

Variable	Relative Importance (0-100%)			Perceived Performance (1-5 scale)		
	Industry Average	Pikes Peak Region Average	Standard Deviation	Industry Average	Pikes Peak Region Average	Standard Deviation
Regional Cooperation	9%	10.3%	1%	3.58	3.83	0.78
Funding Support & Certainty	13%	10.2%	1%	3.06	2.75	0.80
Local Community Support	11%	10.1%	1%	3.60	3.59	0.69
Effective Advocacy Program	9%	10.1%	1%	3.39	3.73	0.66
Economic Development	9%	10.1%	1%	3.91	4.01	0.69
Industry Support	12%	10.1%	1%	3.70	3.89	0.72
Hospitality Culture	10%	10.0%	1%	3.55	3.58	0.85
Membership Strength & Support	7%	9.9%	1%	3.42	3.80	0.70
Workforce	9%	9.9%	1%	3.16	3.31	0.74
Effective DMO Governance Model	11%	9.3%	2%	3.74	3.69	0.83
COMMUNITY SUPPORT & ENGAGEMENT - Pikes Peak Region						3.61
INDUSTRY AVERAGE COMMUNITY SUPPORT & ENGAGEMENT						3.60

RESULTING SCENARIO **VOYAGERS**

Community Support & Engagement: Report Card – Stakeholder Group

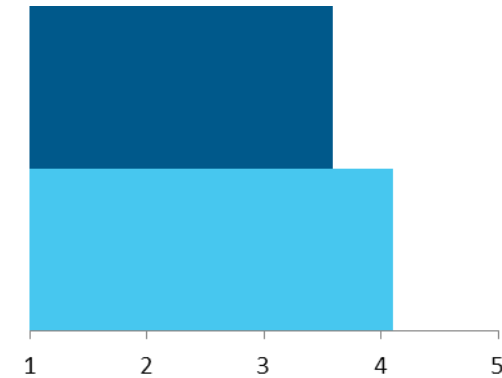
Variable	Perceived Performance (1-5 scale)						
	Pikes Peak Region Average	Management Team	Board of Directors	Bureau Partners and Stakeholders	Customers	Government Leaders	Community Leaders
Regional Cooperation	3.83	4.50	4.25	3.58	3.80	4.31	3.74
Funding Support & Certainty	2.75	2.13	2.79	2.73	3.17	3.13	2.57
Local Community Support	3.59	3.80	3.90	3.31	3.56	4.09	3.61
Effective Advocacy Program	3.73	3.92	4.08	3.49	3.64	4.40	3.68
Economic Development	4.01	4.00	4.38	3.78	4.02	4.32	4.00
Industry Support	3.89	4.88	4.33	3.67	3.67	4.50	3.78
Hospitality Culture	3.58	3.63	4.21	3.15	3.80	4.25	3.47
Membership Strength & Support	3.80	4.00	4.21	3.83	3.93	3.94	3.54
Workforce	3.31	2.88	3.83	3.00	3.27	4.06	3.30
Effective DMO Governance Model	3.69	4.75	4.50	3.60	3.43	3.88	3.46
# of Participants		4	12	30	15	8	37
COMMUNITY SUPPORT & ENGAGEMENT							3.61
INDUSTRY AVERAGE COMMUNITY SUPPORT & ENGAGEMENT							3.60

RESULTING SCENARIO

VOYAGERS

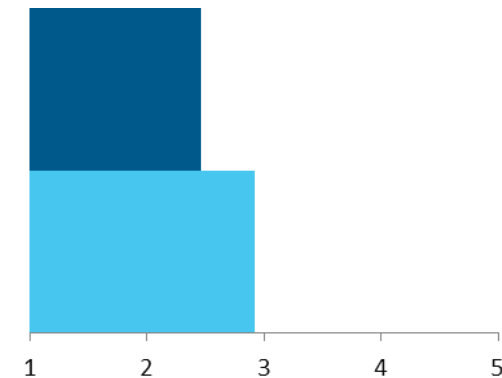
Regional Cooperation

- There is broad collaboration and coordination among tourism partners
- CSCVB marketing efforts have broad economic benefits across the region



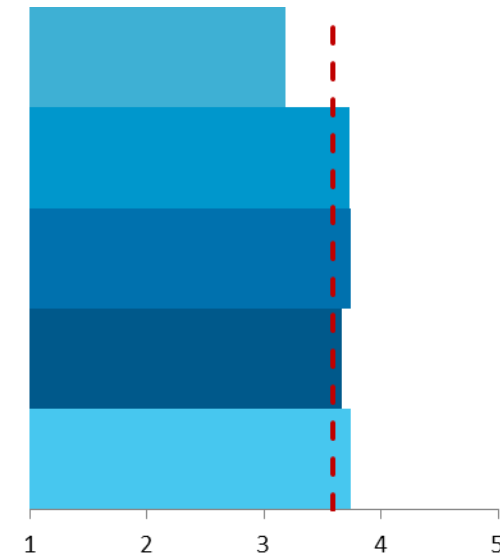
Funding Support & Certainty

- Sufficient revenue sources to fund their strategies
- Stable revenue sources to fund their strategies



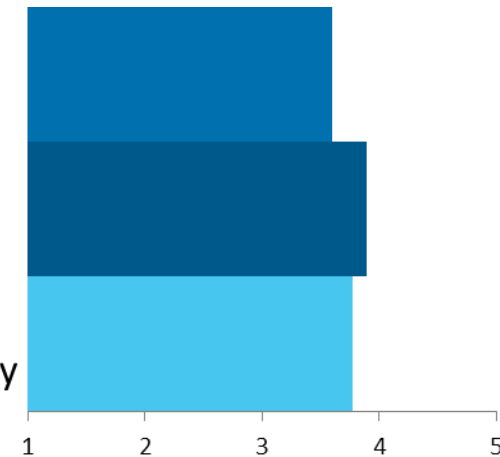
Local Community Support

- Residents have a general understanding/positive perception of tourism
- Businesses have a general understanding/positive perception of tourism
- Media has a general understanding/positive perception of tourism
- DMO has great corporate support
- Tourism industry gets positive media coverage locally



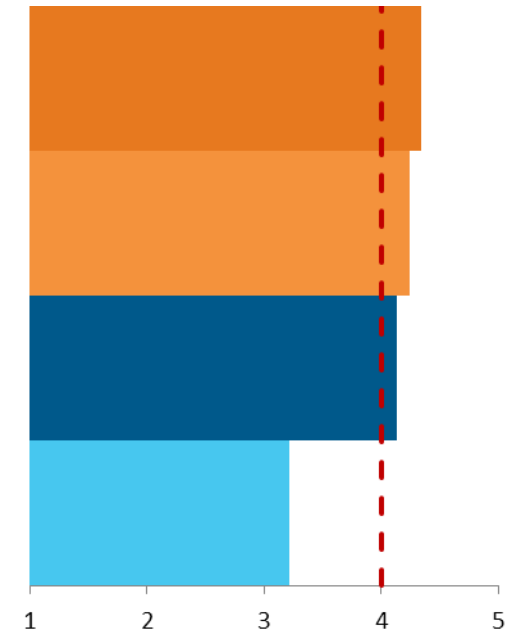
Effective Advocacy Program

- Advocacy program is successful in educating government
- Regional government relies on DMO for input on destination management
- Regional government is supportive of DMO programs and the tourism industry



Economic Development

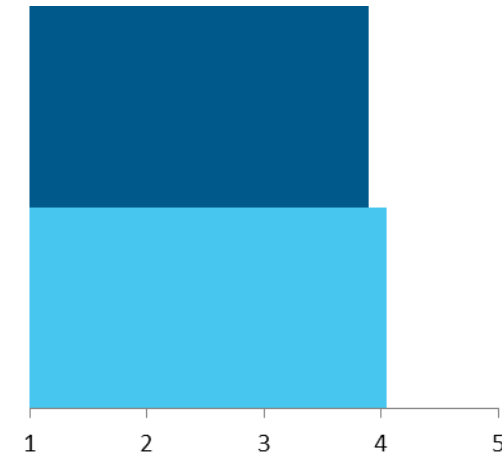
- DMO/Tourism industry is vital in our community's economic strategies
- DMO has a good working relationship with local chambers
- Tourism and the meetings industry are identified as key economic drivers
- Tourism master plan for the Region



Industry Support

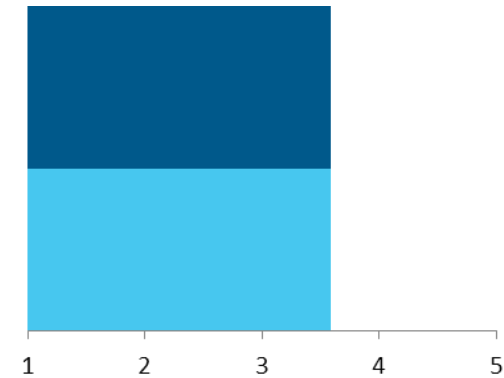
■ Industry leaders/stakeholders are supportive of the direction of CSCVB

■ DMO is seen as a leader in the state and regional tourism industry



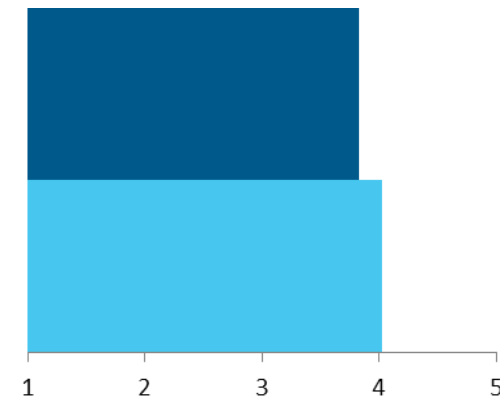
Hospitality Culture

- Hospitality culture that welcomes visitors and improves their experience
- Reputation for offering high-quality customer service



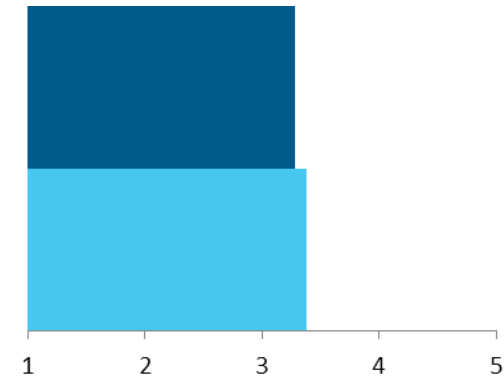
Membership Strength & Support

- DMO partners are active, engaged and supportive
- Businesses benefit from being a partner



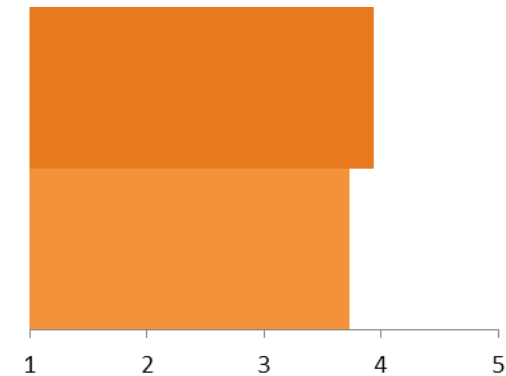
Workforce

- Hospitality industry is able to attract and retain a high-quality workforce
- Workforce is stable and has a positive labor relations environment



Effective DMO Governance Model

- DMO has an effective governance structure
- Local leaders are engaged in CSCVB's governance structure



Key Takeaways

- Currently in the Voyagers scenario, with slightly below average destination strength and slightly above average community support & engagement
- Differences in perceptions among stakeholder groups



Destination Opportunities

- Shopping & Dining
- Domestic Air Access
- Brand
 - Established brand
 - Not ready to become an international destination
- Public Wi-Fi
- Convention & Meeting Facilities
- Mobility & Access
 - Public transportation
 - Road congestion
 - Access for disability
- Lack of diverse event facilities
- Lack of sports & recreation facilities



Community Support & Engagement

- Funding support & certainty
- Tourism master plan for the region
- Workforce