

DESTINATION

**NEXT**

**Workshop**

**Visit Cheyenne**

**November 19, 2015**

# Opening Remarks

Darren Rudloff  
President & CEO  
Visit Cheyenne

# **DestinationNEXT**

Paul Ouimet  
Managing Director  
DMAI DestinationNEXT

## Today's Objectives

- 1) **Present DestinationNEXT findings and scenario model**
- 2) **Review and discuss assessment results of destination strength and community support & engagement**
- 3) **Breakout group discussions on possible initiatives**

# DESTINATION

# NEXT



PREPARED BY  
InterVISTAS Consulting Inc.

## A STRATEGIC ROAD MAP FOR THE NEXT GENERATION OF GLOBAL DESTINATION MARKETING



Phase 1  
**Futures Study**





# DMO Leadership Survey



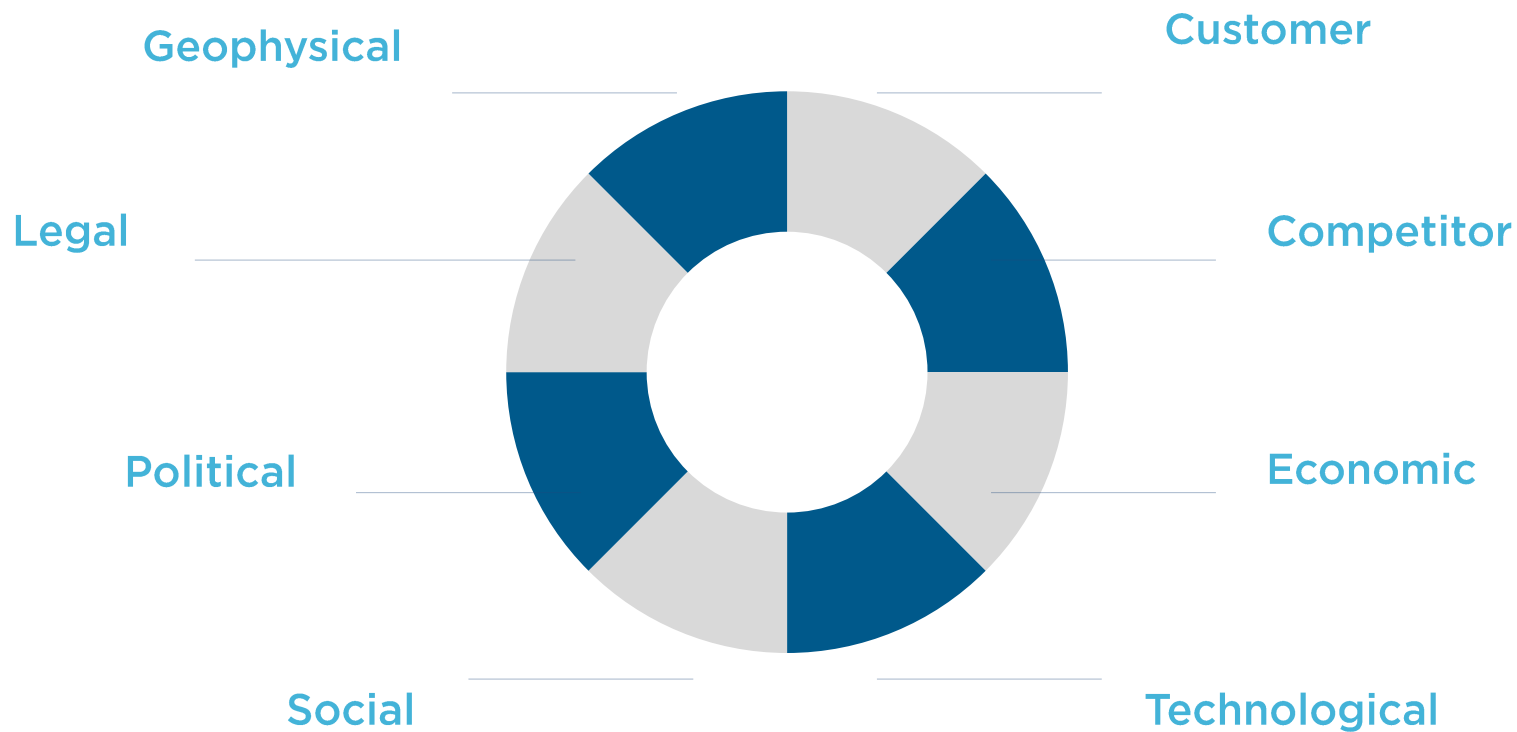
Futurist Panel



Industry Panel

# WE IDENTIFIED 64 MAJOR TRENDS

## SELECTED TRENDS

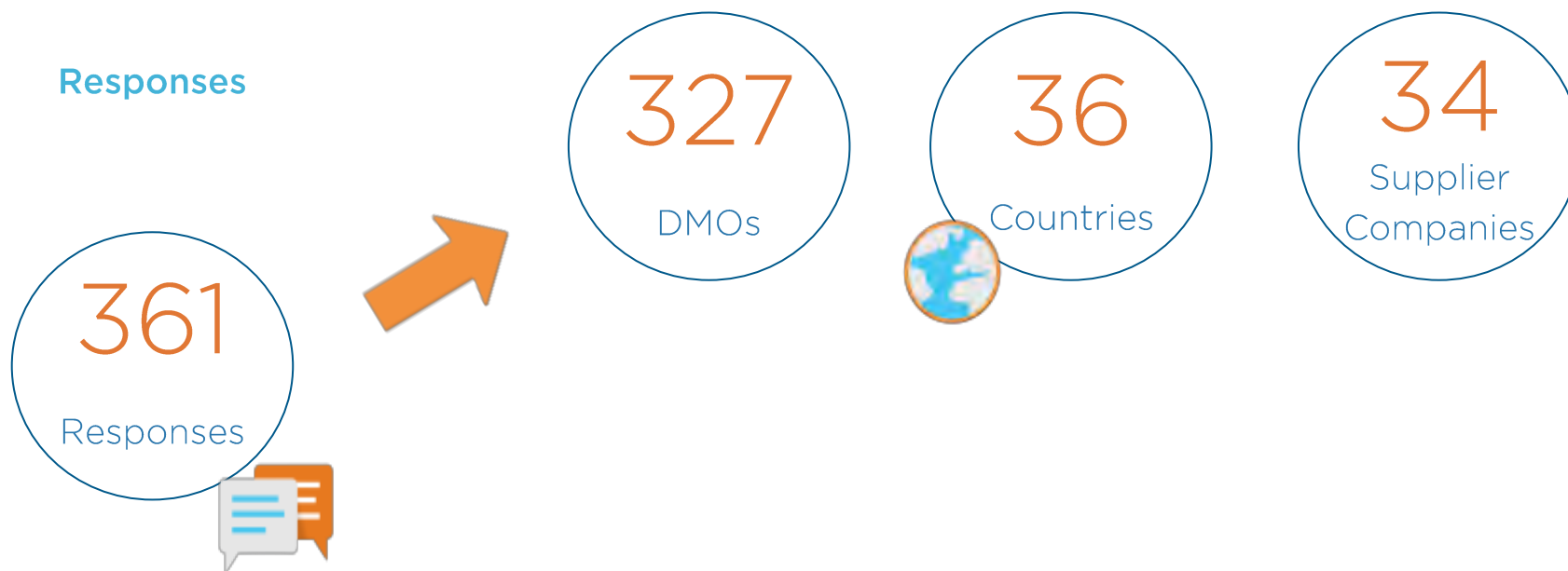


WE DEVELOPED 49 POTENTIAL OPPORTUNITIES



# WE SPOKE TO YOU

## Responses



DMO Responsibilities

Leisure	9%
Group	9%
Both	82%

DMO Budget

<\$1M	24%
\$1-2M	20%
\$2-5M	23%
\$5-20M	25%
>\$20M	8%



# Key Trends



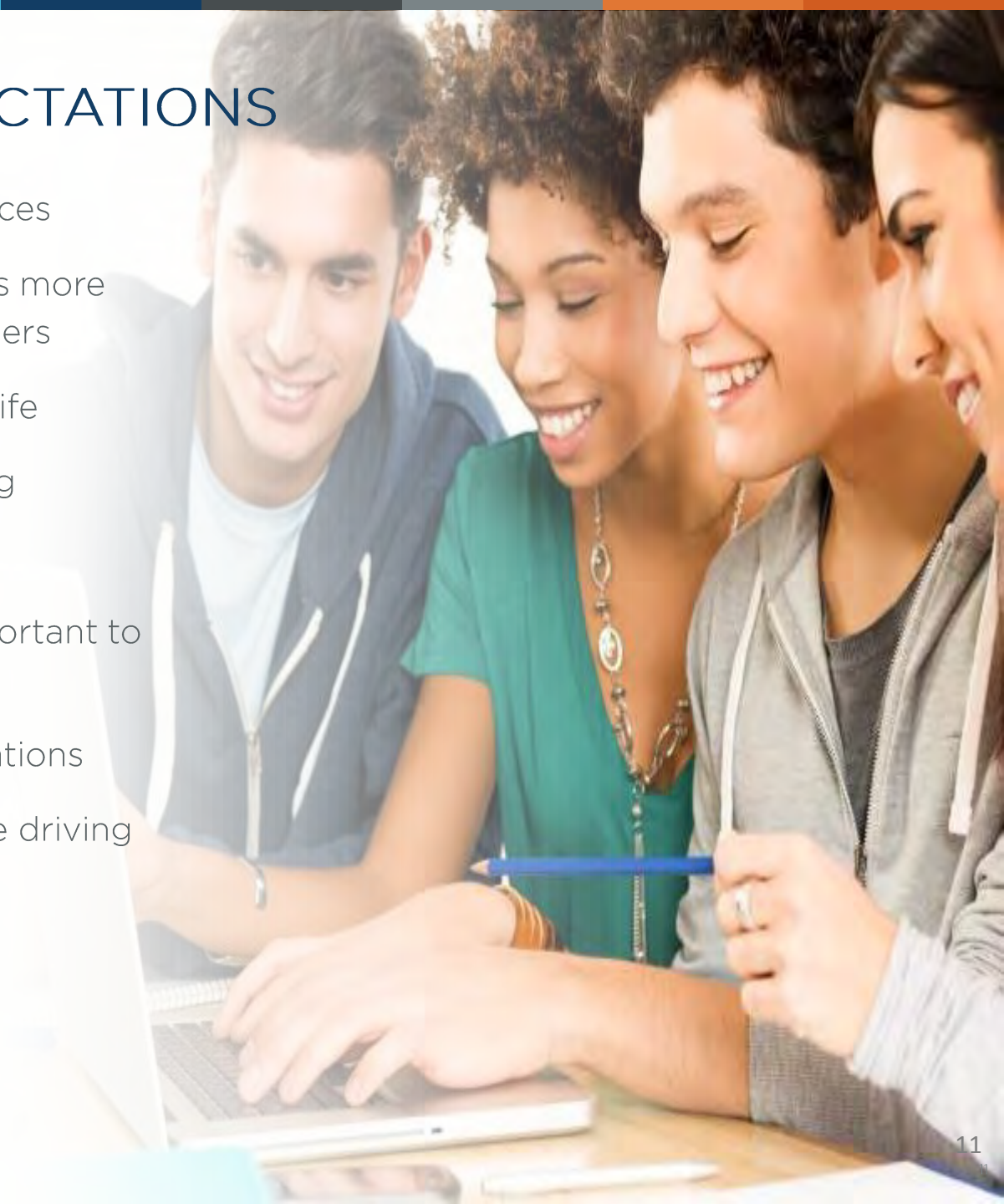
Technology



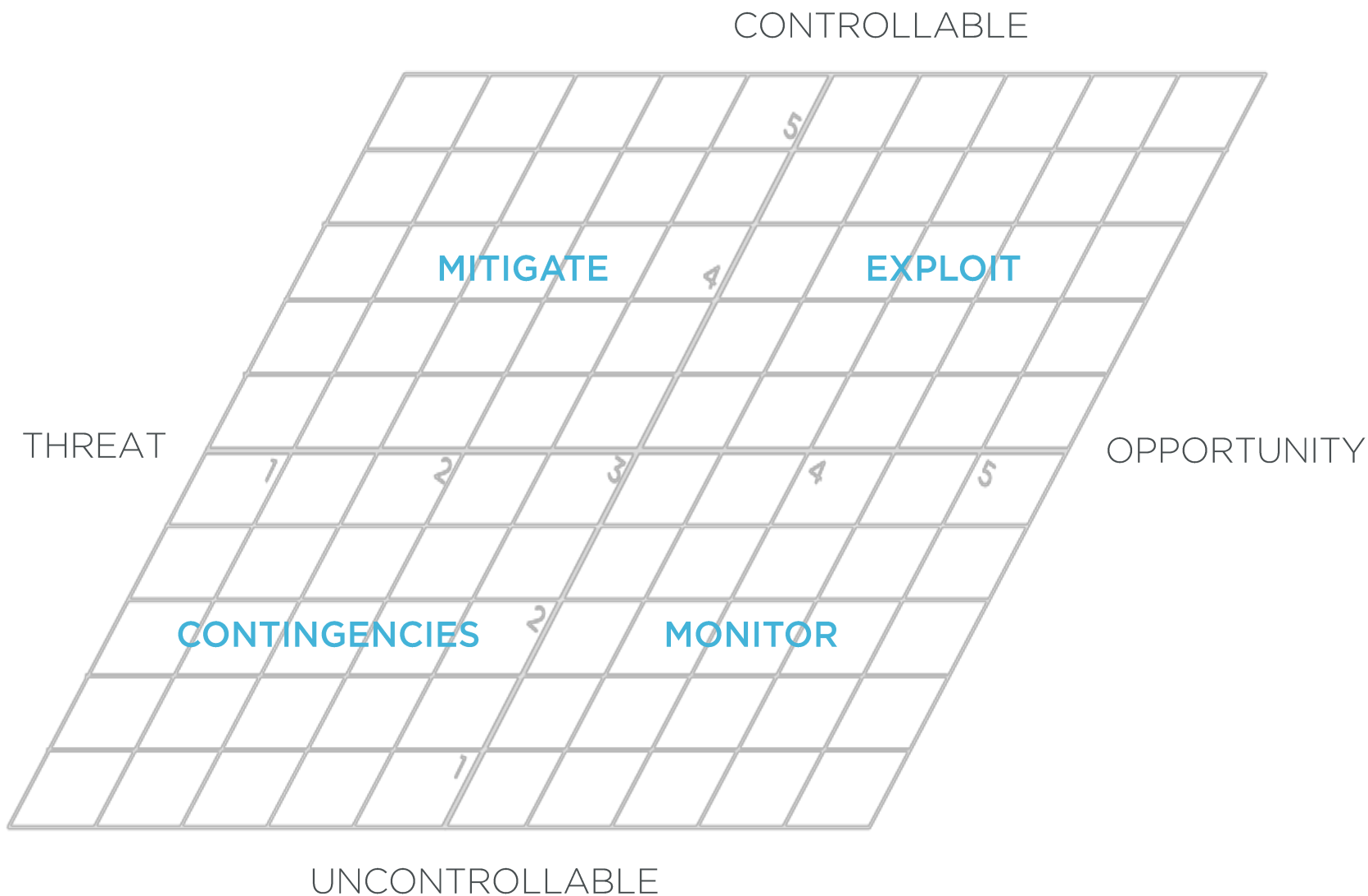
Customer  
Expectations

# CONSUMER EXPECTATIONS

- 5 Personalized travel experiences
- 7 Value and experience brands more important for meeting planners
- 8 Experiencing local's way of life
- 9 Faster travel decision making
- 10 Online ordering the norm
- 13 Destination brand more important to consumers
- 15 Rise of short-trips/mini-vacations
- 17 Peer-to-peer buyer influence driving customer purchases

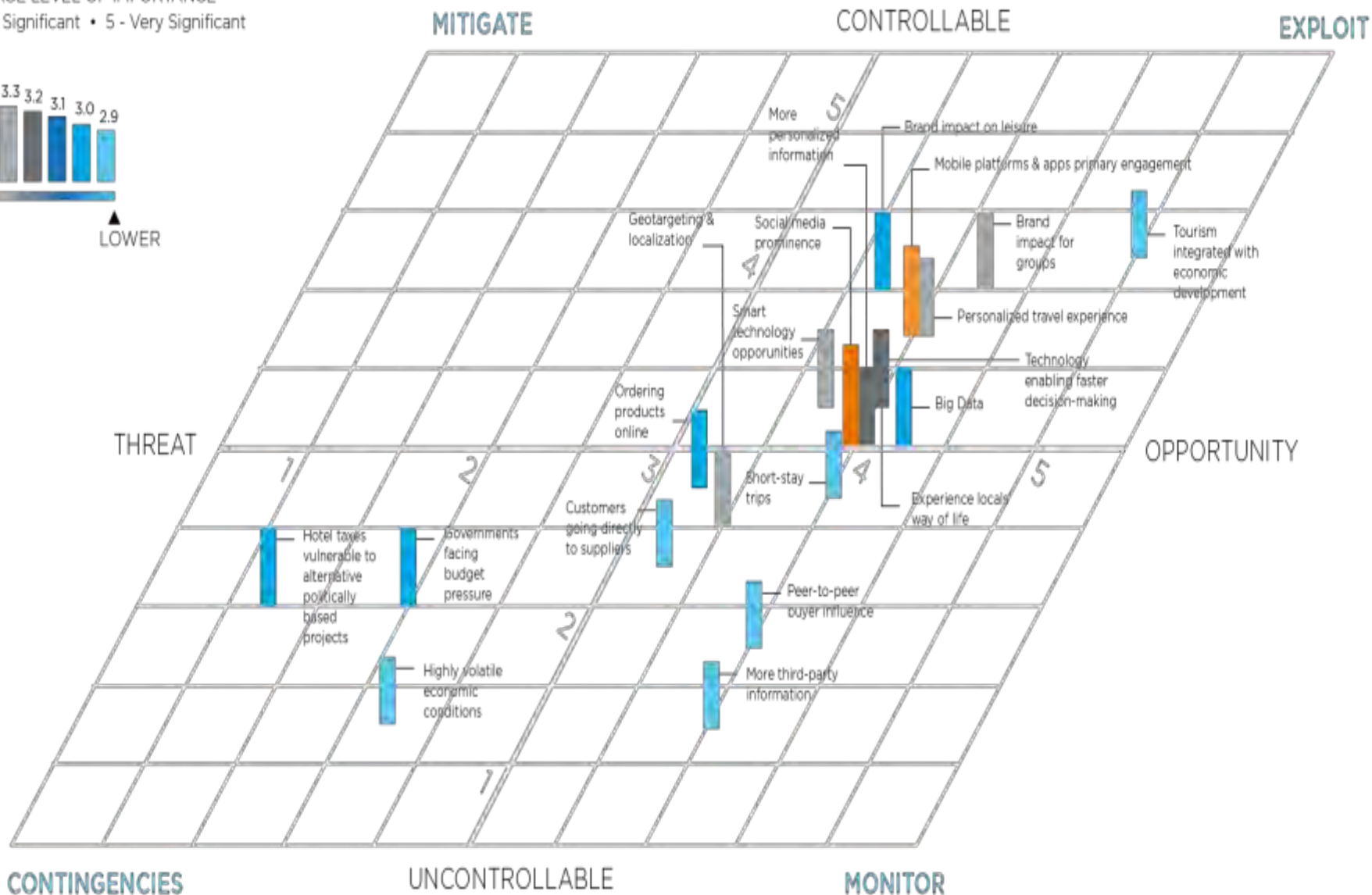
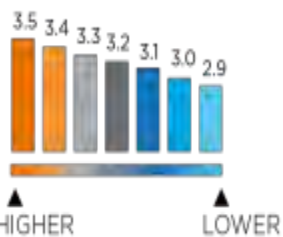


# FUTURE MAP - TOP 20 TRENDS



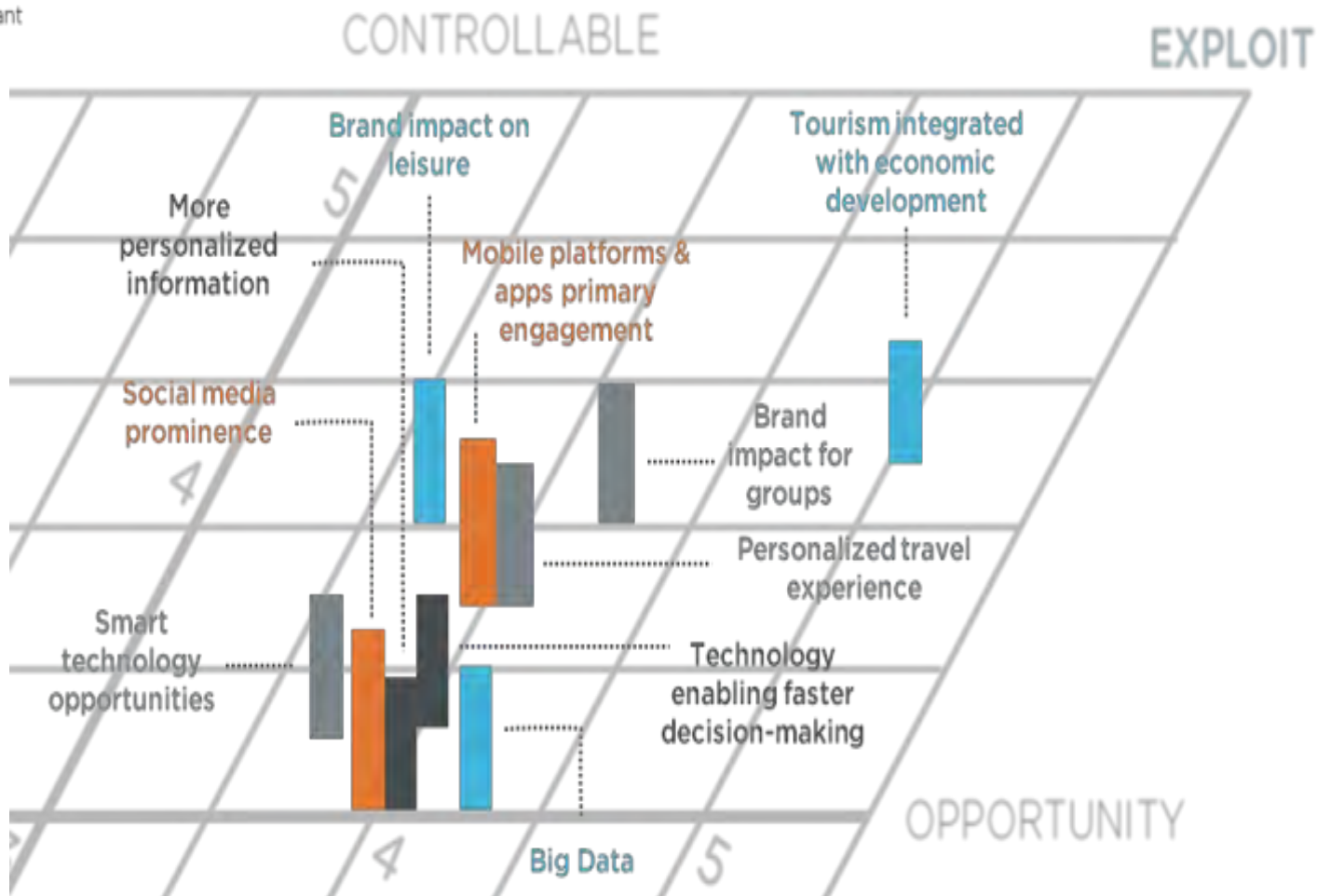
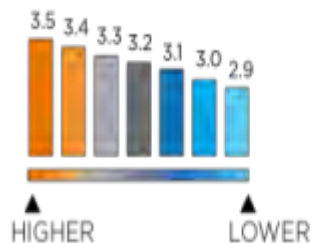
# FUTURE MAP - TOP 20 TRENDS

AVERAGE LEVEL OF IMPORTANCE  
1 - Not Significant • 5 - Very Significant



# FUTURE MAP - TOP 20 TRENDS

AVERAGE LEVEL OF IMPORTANCE  
1 - Not Significant • 5 - Very Significant





# Transformational Opportunities



## #1: Broadcast to Engagement

Interacting with & leveraging the new marketplace



## #2: Brand Building

Building & protecting the destination brand



## #3: Collaboration & Partnerships

Evolving the DMO business model



# 1. Engagement

- Travelers typically visit 22 websites in 9.5 web-sessions when researching a trip
- 76% of consumers today feel advertisements are “very” or “somewhat exaggerated”
- 92% of consumers trust peer recommendations more so than advertisements
- 85% of travelers use their smartphone while abroad
- 74% of travelers use social media while on vacation







# #2: BRAND BUILDING

## New DMO Start-up Change in role from today

Rank	Role	Change in Rank
1	Brand marketing	+1
2	Destination and product development	+3
3	Meeting and convention sales	-2
4	Destination information resource	Same
5	Leisure sales (group and independent)	-2
6	Visitor experience servicing	+2
7	Industry advocate and association leader	Same
8	Major event partner/developer	+1
9	Convention services	-3
10	Venue management and operations	Same



## 2. Brand Building

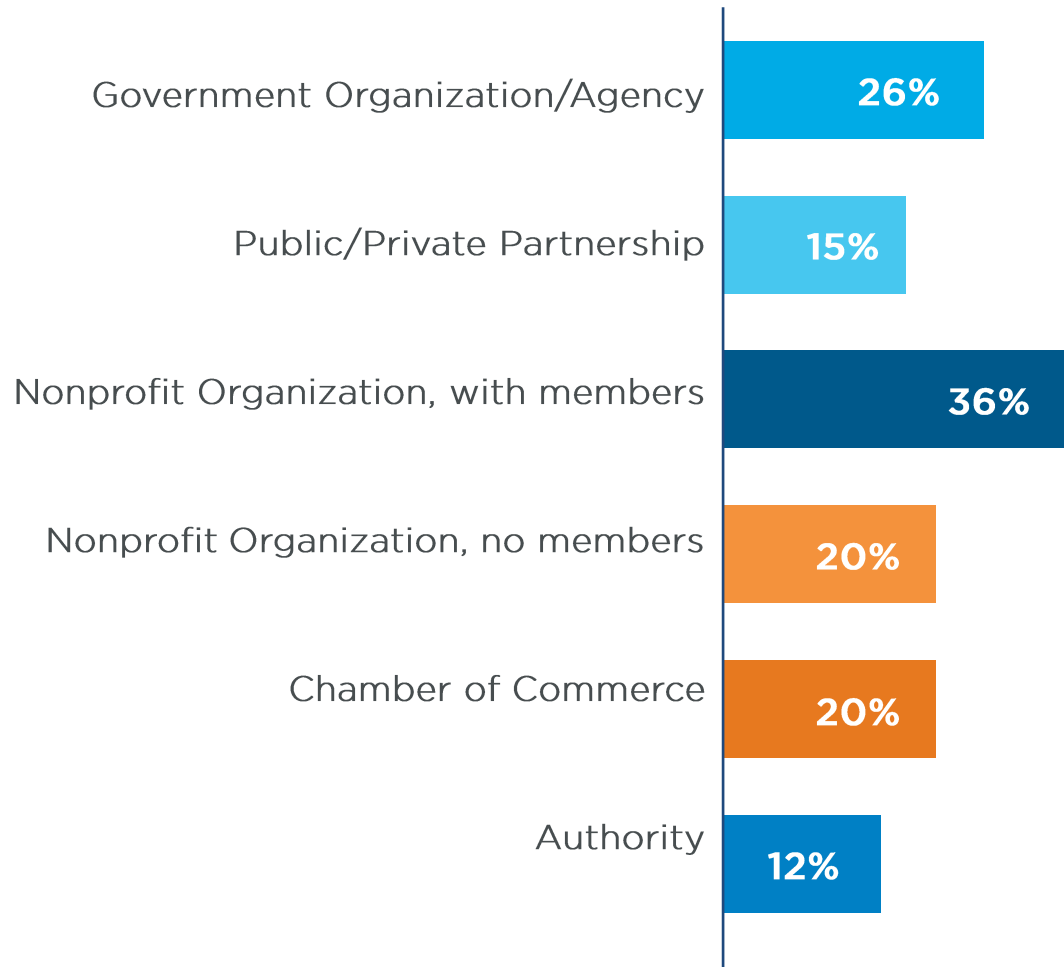
- Play central role in advocacy for destination
- Connect visitor experience with quality of life of residents
- Greater role as cultural champion of destination
- Participate in building platforms for the visitor experience
- Balance need for growth with responsible and sustainable development
- Play a greater role in policy and product development





# #3: NEW BUSINESS MODEL

## Business Model of Future Change Expected in Next 5 Years





### 3. New Business Model

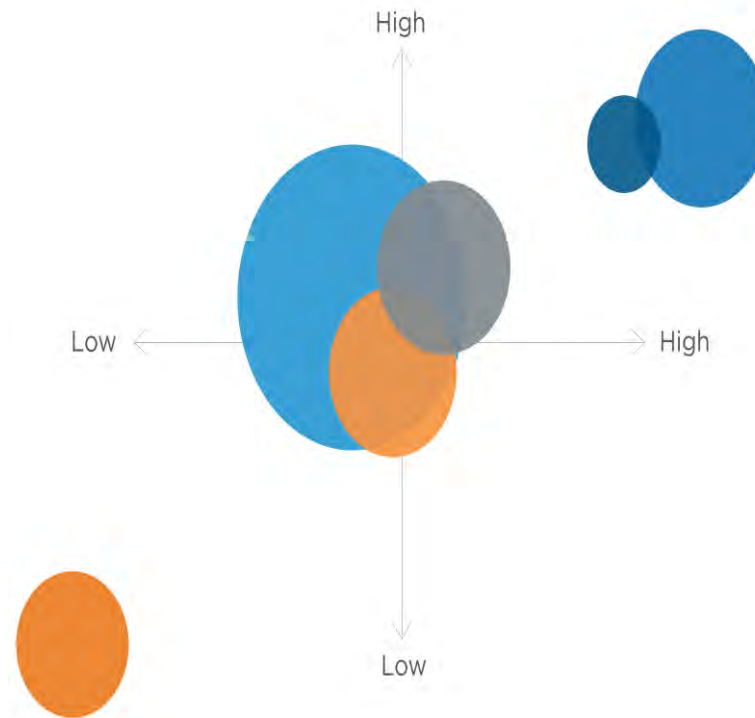
- More involved in broader economic development initiatives
- Adopt uniform operating standards and measures of performance
- Agree on uniform methodology to measure economic impact
- Better understanding of economic impact of industry
- Collaborative technology will be core strategy
- Engage more closely with non-traditional stakeholders



# Two Drivers

## Community Support & Engagement

Destination Strength



BUDGET SIZE:



# Different Realities for DMOs





## Phase 2



# Phase 2 Deliverables

## 01 ONLINE DIAGNOSTIC TOOL



- Finalize scenario model and metrics
- Finalize and launch online diagnostic tool

## 02 NEXTPractices



- Develop an initial list of potential NEXTPractices to capitalize on three transformational opportunities and improve community support & engagement and destination strength





# Diagnostic Tool



# Purpose of Diagnostic Tool

Scenario model intended to be strategic diagnostic tool,  
not a benchmarking index to rank DMOs, CVBs or destinations

**Objective self-assessment to help identify  
priorities and strategies for the future**



# Destination Strength Variables



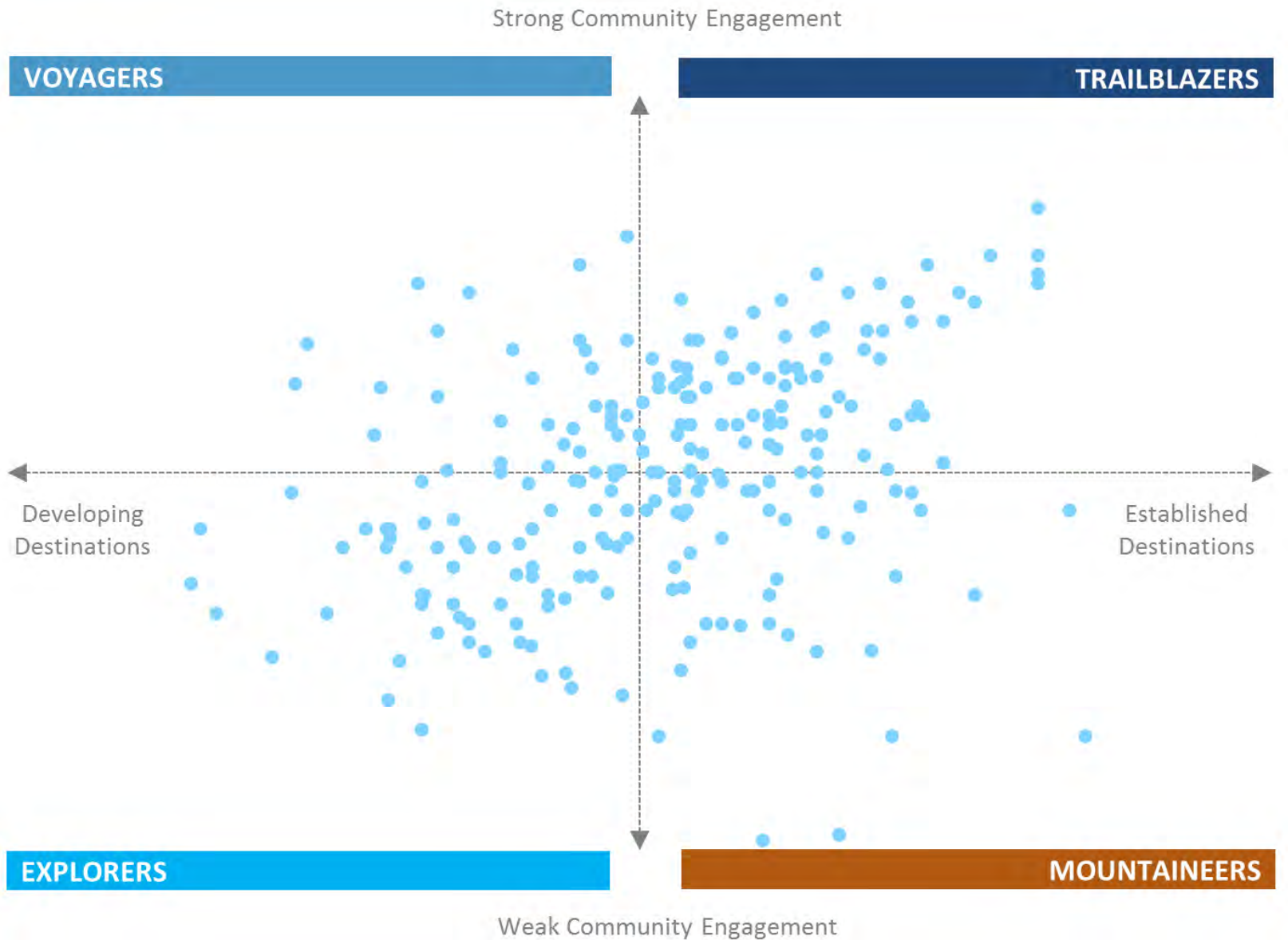
# Community Support Variables



## Community Support & Engagement



# Scenario Plots to Date



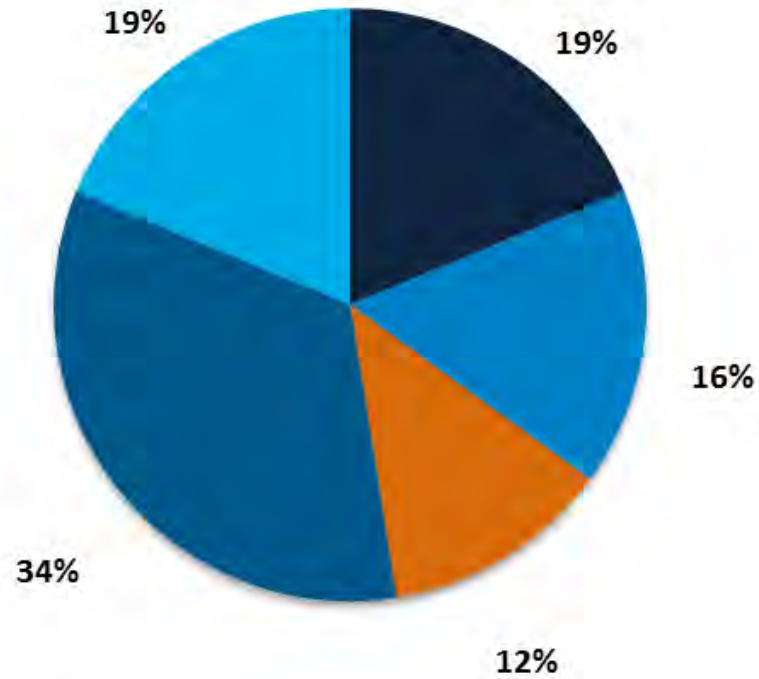
# DESTINATION



## Multi-User Online Diagnostic Tool Results: **Cheyenne, Wyoming**

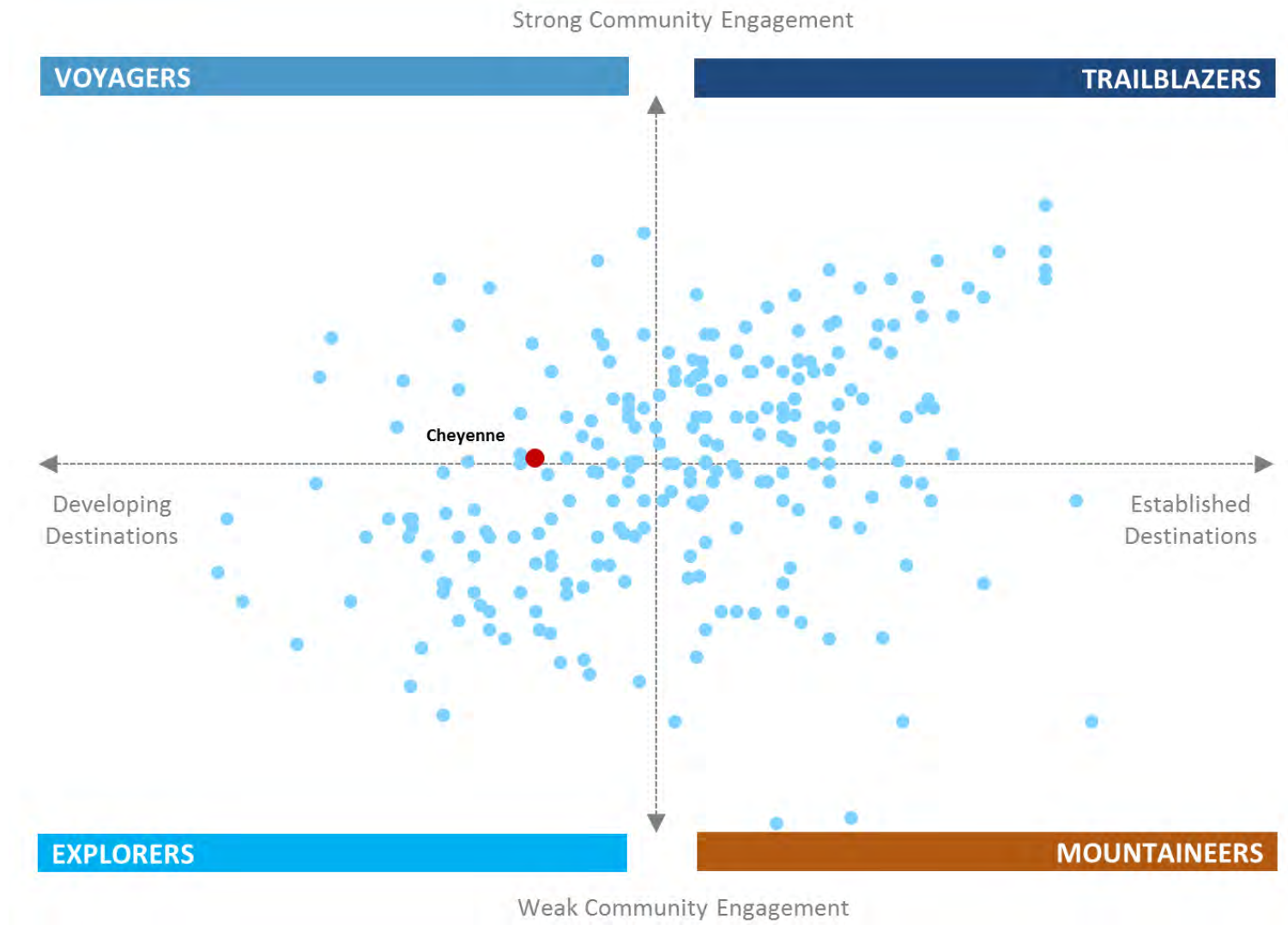
Visit Cheyenne  
November 19, 2015

# 80 Responses



- Visit Cheyenne Board or Staff Member
- Local Government Officials
- Hoteliers
- Local Business Leaders
- Local Attractions and Events

# Cheyenne Overall Assessment





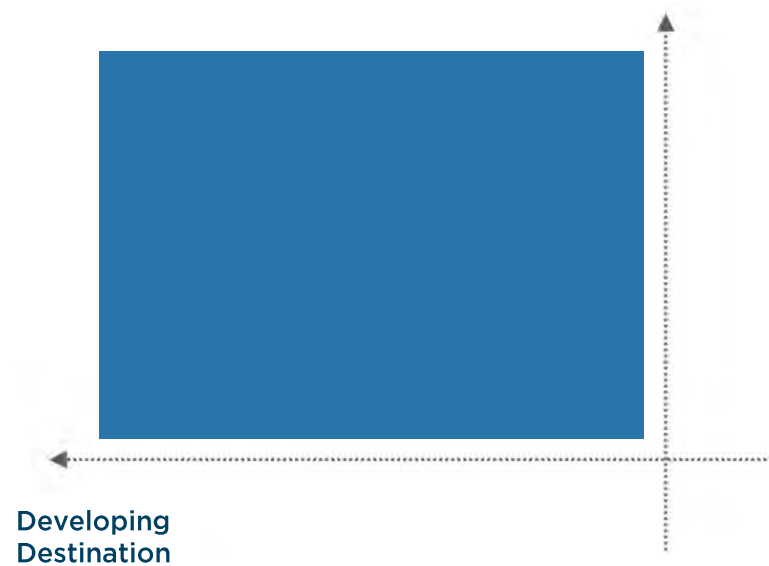
# Voyagers

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

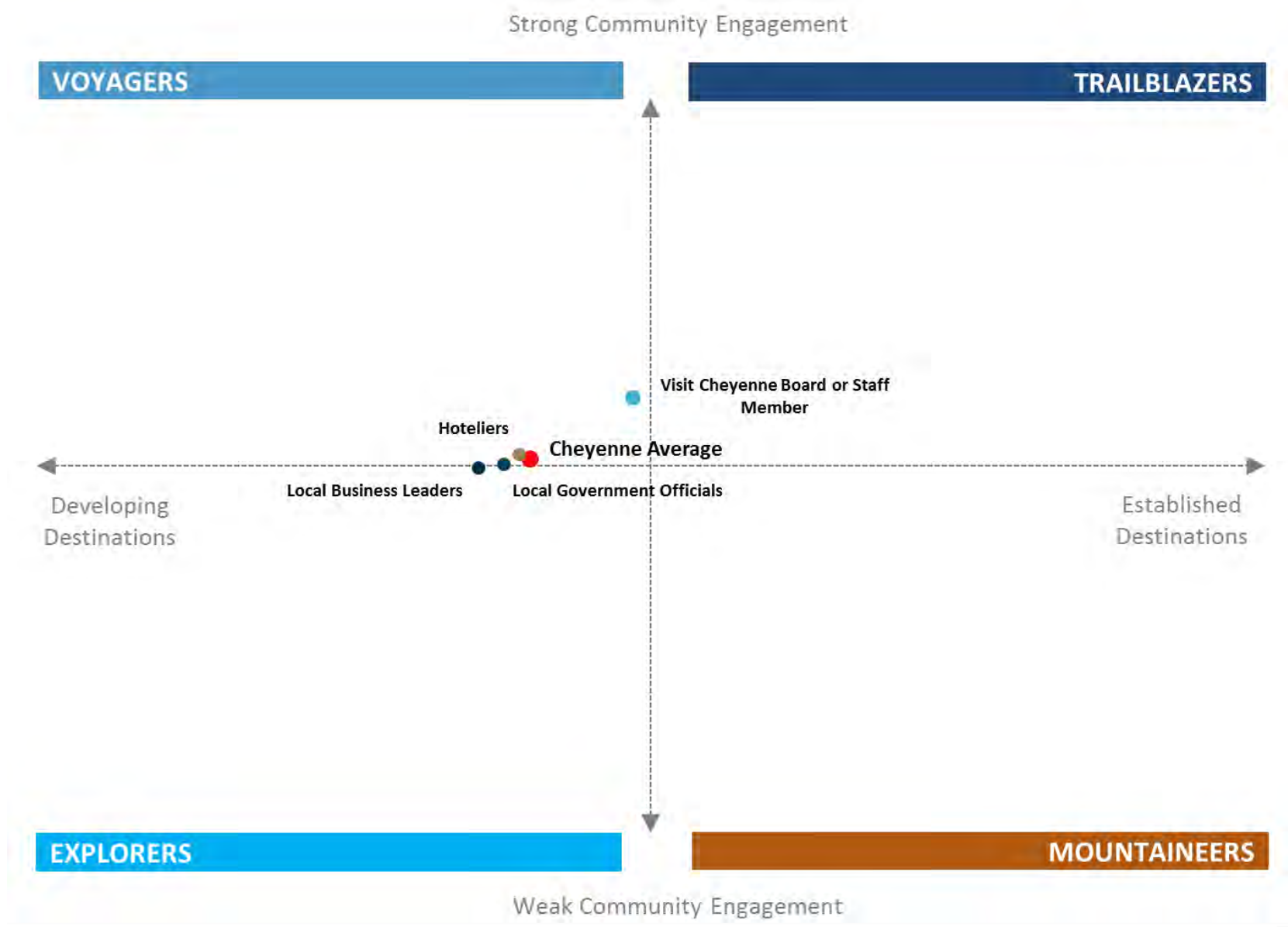
## Key Strategic Challenges

- 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

Strong Community Engagement



# Cheyenne Results



# Destination Strength: Relative Importance

Variable	Relative Importance (0-100%)		
	Industry Average	Average	Standard Deviation
Brand	13%	11.3%	2%
Destination Performance	12%	10.7%	2%
Accommodation	12%	10.6%	2%
Communication & Internet Infrastructure	7%	10.5%	2%
Attractions & Entertainment	12%	10.4%	2%
Events	9%	10.2%	2%
Convention & Meeting Facilities	10%	10.1%	3%
Mobility & Access	7%	9.7%	2%
Sports & Recreation Facilities	9%	9.0%	3%
Air Access	9%	7.6%	4%

# Destination Strength

Variable	Relative Importance (0-100%)			Perceived Performance (1-5 scale)		
	Industry Average	Average	Standard Deviation	Industry Average	Average	Standard Deviation
Brand	13%	11.3%	2%	3.21	3.32	0.70
Destination Performance	12%	10.7%	2%	3.83	4.22	0.82
Accommodation	12%	10.6%	2%	3.42	3.70	0.80
Communication & Internet Infrastructure	7%	10.5%	2%	3.32	3.09	0.77
Attractions & Entertainment	12%	10.4%	2%	3.68	3.19	0.67
Events	9%	10.2%	2%	3.73	3.04	0.75
Convention & Meeting Facilities	10%	10.1%	3%	3.12	2.72	0.84
Mobility & Access	7%	9.7%	2%	3.04	2.92	0.83
Sports & Recreation Facilities	9%	9.0%	3%	3.32	2.58	0.90
Air Access	9%	7.6%	4%	2.90	1.41	0.60

<b>DESTINATION STRENGTH</b>	<b>3.10</b>
<b>INDUSTRY AVERAGE DESTINATION STRENGTH</b>	<b>3.49</b>

**RESULTING SCENARIO** **VOYAGERS**

# Destination Strength: Stakeholder Groups

Variable	Perceived Performance (1-5 scale)					Average
	Board or Staff Member	Government Leaders	Hoteliers	Buisness Leaders	Attractions and Events	
Brand	3.67	3.09	3.21	3.23	3.43	3.32
Destination Performance	4.71	4.15	4.05	4.26	3.84	4.22
Accommodation	4.28	3.29	4.23	3.47	3.53	3.70
Communication & Internet Infrastructure	3.36	2.97	2.78	3.01	3.27	3.09
Attractions & Entertainment	3.58	3.10	2.84	3.16	3.19	3.19
Events	3.42	3.07	2.58	2.94	3.13	3.04
Convention & Meeting Facilities	3.30	2.48	2.97	2.44	2.67	2.72
Mobility & Access	3.09	2.88	2.82	2.74	3.19	2.92
Sports & Recreation Facilities	2.77	2.79	2.40	2.28	2.87	2.58
Air Access	1.50	1.31	1.47	1.19	1.79	1.41

<b>DESTINATION STRENGTH</b>	<b>3.10</b>
<b>INDUSTRY AVERAGE DESTINATION STRENGTH</b>	<b>3.49</b>

**RESULTING SCENARIO** **VOYAGERS**

# Brand

- Cheyenne has an established brand that is simple, memorable, and market-tested
- Cheyenne is known for being environmentally conscious and sustainable destination
- Cheyenne is known for being safe, clean, and secure for visitors
- Cheyenne is known as being healthy and an outdoor, active city
- Cheyenne is known for having a lot of things to see and do
- Cheyenne's main icon image is a cowboy on horseback
- Cheyenne is prepared to become an international tourism destination with adequate translations of menus, money exchanges, multi language street signage and available bi-lingual tourism guides
- Cheyenne appeals to a wide range of visitors including geographic (regional, national, international), age, socioeconomic, racial, and other diverse visitors



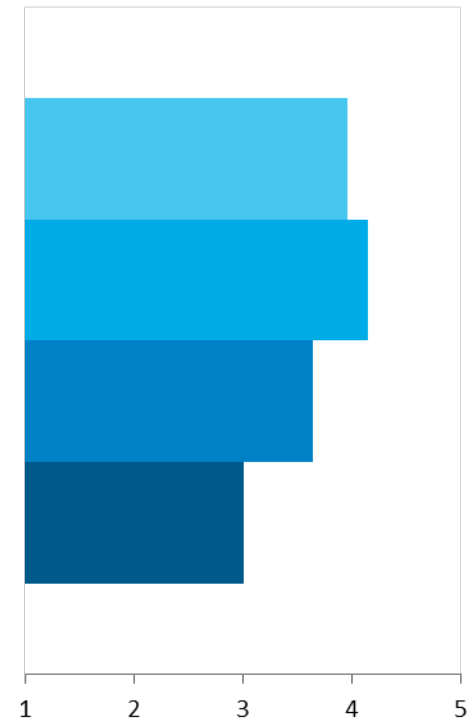
# Destination Performance

- Visit Cheyenne adequately measures and tracks the performance of our tourism industry (e.g. number of annual visitors, visitor spending, room nights booked, hotel performance, and the number of meetings and conventions)
  
- Visit Cheyenne does a good job at communicating the performance of our tourism industry
  
- Visit Cheyenne measures and communicates what tourism and conventions contribute to Cheyenne's economy (e.g. GDP, jobs)



# Accommodation

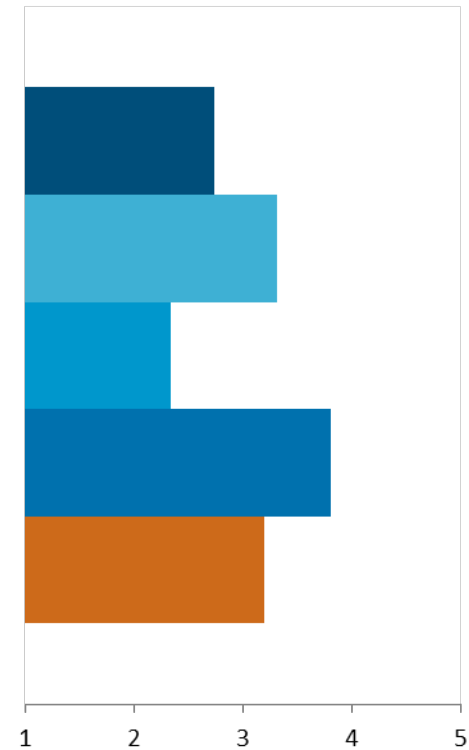
- Cheyenne has adequate accommodations capacity
- Cheyenne offers a diversity of accommodation price options and has the presence of well- known brand name hotels
- The location and proximity of accommodation options in Cheyenne meets visitor needs
- Cheyenne has a sufficient number of large, headquarter hotels to meet demand and support the Convention Center





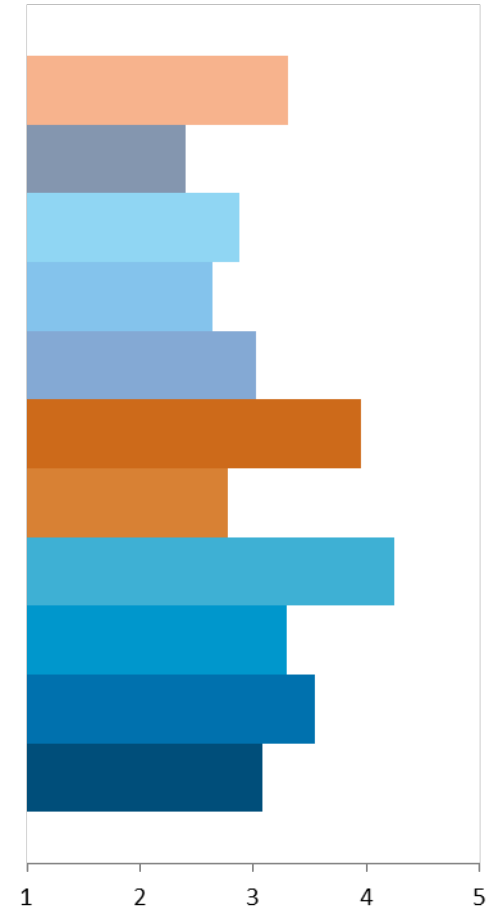
# Communication & Internet Infrastructure

- Cheyenne offers sufficient free Wi-Fi in outdoor/public areas with high visitor traffic
- There is substantial Wi-Fi access in Cheyenne's meeting/convention facilities
- Cheyenne is known as a high-tech, innovative city
- Cheyenne's tourism industry uses and leverages social media (Facebook, INSTAGRAM, YouTube, etc.) to support the brand and market the city's tourism industry
- There is good mobile coverage/availability at all of Cheyenne's attractions and entertainment areas



# Attractions & Entertainment

- Cheyenne has an assortment of authentic and unique attractions and entertainment opportunities
- Downtown Cheyenne offers diverse and high-quality shopping opportunities
- The metro Cheyenne area offers diverse and high-quality shopping opportunities
- Cheyenne has unique and high-quality dining options
- Cheyenne has high-quality and wide-ranging arts and cultural attractions
- Cheyenne offers a wide diversity of parks and bike trails
- Cheyenne has the type of large, famous attractions that cause people to stay (or plan to stay) an extra day in the city
- Cheyenne's No. 1 attraction, Cheyenne Frontier Days, supports the city's brand by providing a fun, engaging, and safe place that encourages visitors to stay longer
- Cheyenne's No. 2 attraction, State Capitol/State Museum, supports the city's brand by providing a fun, engaging, and safe place that encourages visitors to stay longer
- Cheyenne's No. 3 attraction, Depot/Downtown Activities, supports the city's brand by providing a fun, engaging, and safe place that encourages visitors to stay longer
- Cheyenne has unique and vibrant neighborhoods that are attractive and accommodating to visitors



# Community Support & Engagement: Relative Importance

Variable	Relative Importance (0-100%)		
	Industry Average	Average	Standard Deviation
Economic Development	9%	10.4%	1%
Funding Support & Certainty	13%	10.4%	2%
Industry Support	12%	10.1%	2%
Hospitality Culture	10%	10.1%	2%
Local Community Support	11%	10.0%	2%
Workforce	9%	10.0%	3%
Membership Strength & Support	7%	9.9%	2%
Effective Advocacy Program	9%	9.8%	2%
Effective DMO Governance Model	11%	9.7%	2%
Regional Cooperation	9%	9.5%	2%

# Community Support & Engagement

Variable	Relative Importance (0-100%)			Perceived Performance (1-5 scale)		
	Industry Average	Average	Standard Deviation	Industry Average	Average	Standard Deviation
Economic Development	9%	10.4%	1%	3.91	4.02	0.75
Funding Support & Certainty	13%	10.4%	2%	3.06	3.69	0.99
Industry Support	12%	10.1%	2%	3.70	4.10	0.96
Hospitality Culture	10%	10.1%	2%	3.55	3.13	1.10
Local Community Support	11%	10.0%	2%	3.60	3.54	0.93
Workforce	9%	10.0%	3%	3.16	2.54	0.93
Membership Strength & Support	7%	9.9%	2%	3.42	3.95	0.84
Effective Advocacy Program	9%	9.8%	2%	3.39	3.65	0.98
Effective DMO Governance Model	11%	9.7%	2%	3.74	3.89	0.95
Regional Cooperation	9%	9.5%	2%	3.58	3.79	0.90

<b>COMMUNITY SUPPORT &amp; ENGAGEMENT</b>	<b>3.63</b>
<b>INDUSTRY AVERAGE COMMUNITY SUPPORT &amp; ENGAGEMENT</b>	<b>3.60</b>

**RESULTING SCENARIO** **VOYAGERS**

# Community Support & Engagement: Stakeholder Groups

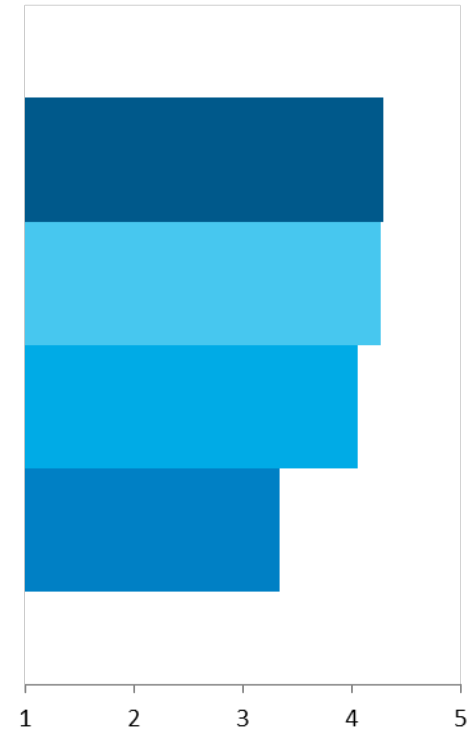
Variable	Perceived Performance (1-5 scale)					Average
	Board or Staff Member	Government Leaders	Hoteliers	Buisness Leaders	Attractions and Events	
Economic Development	4.02	4.13	4.33	4.06	3.63	4.02
Funding Support & Certainty	4.20	3.54	3.80	3.56	3.47	3.69
Industry Support	4.63	3.96	3.90	4.17	3.70	4.10
Hospitality Culture	3.23	3.00	3.90	2.80	3.20	3.13
Local Community Support	3.97	3.58	3.15	3.70	3.07	3.54
Workforce	2.63	2.88	2.35	2.35	2.63	2.54
Membership Strength & Support	4.23	3.50	4.15	4.04	3.77	3.95
Effective Advocacy Program	4.18	3.77	3.33	3.63	3.24	3.65
Effective DMO Governance Model	4.30	3.85	3.90	3.85	3.57	3.89
Regional Cooperation	4.37	3.69	3.60	3.78	3.43	3.79

<b>COMMUNITY SUPPORT &amp; ENGAGEMENT</b>	<b>3.63</b>
<b>INDUSTRY AVERAGE COMMUNITY SUPPORT &amp; ENGAGEMENT</b>	<b>3.60</b>

**RESULTING SCENARIO** **VOYAGERS**

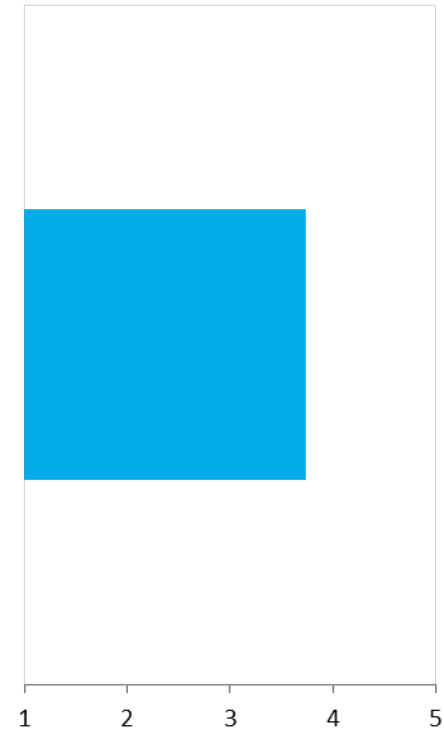
# Economic Development

- Visit Cheyenne and the tourism industry play an important role in our community's economic strategies, including transportation, air service, and business development
- Visit Cheyenne has a good working relationship with local chambers and economic development agencies
- Tourism and the meetings industry are identified as a key economic drivers for Cheyenne
- There is a tourism master plan for Cheyenne that includes future capital investment and programming



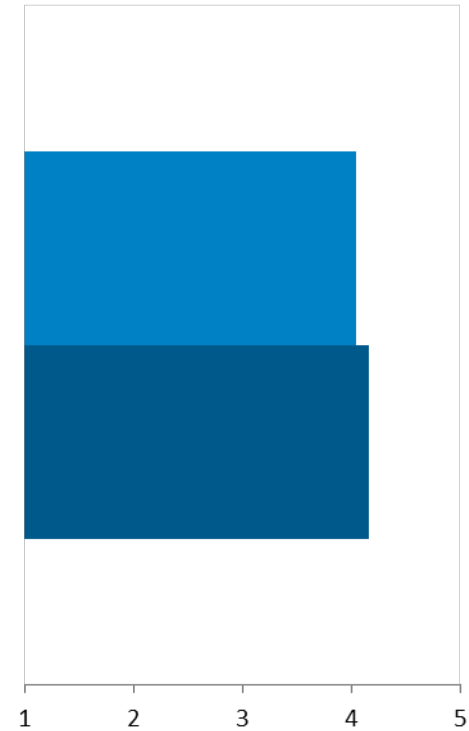
# Funding Support & Certainty

- Visit Cheyenne has stable and sufficient revenue sources to fund their strategies and initiatives today



# Industry Support

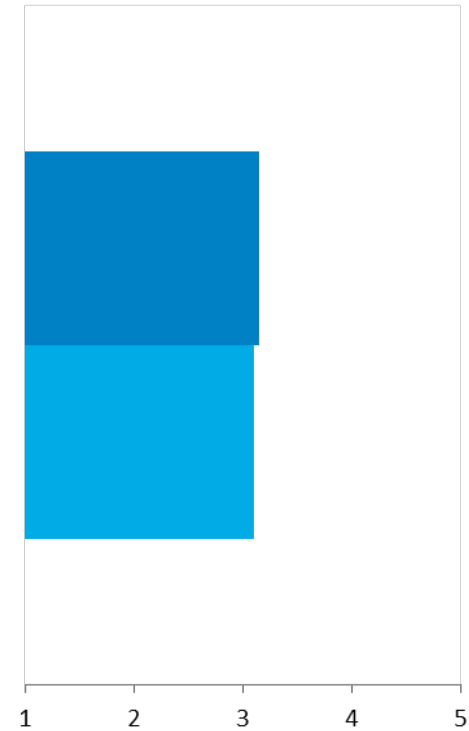
- Cheyenne tourism industry leaders and stakeholders are supportive of the direction and plans of Visit Cheyenne
- Visit Cheyenne is seen as a leader in the state and regional tourism industry





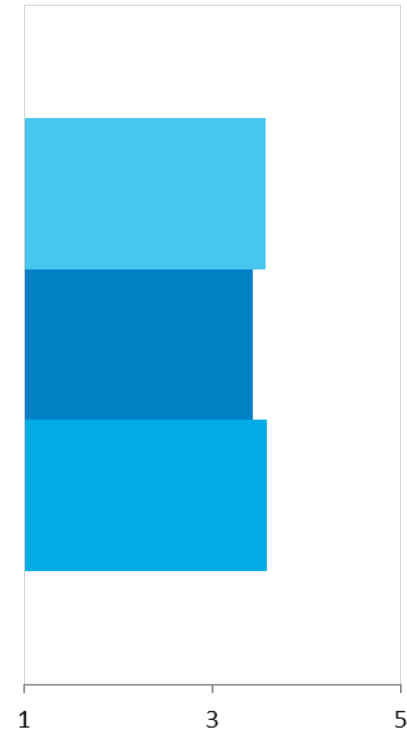
# Hospitality Culture

- Cheyenne has a hospitality-minded culture that welcomes visitors and improves their experience
- Cheyenne has a reputation for offering high-quality customer service



# Local Community Support

- Residents, businesses and media in Cheyenne have a general understanding and positive perception of the city's tourism and meetings industry
- Visit Cheyenne has great corporate support
- Cheyenne's tourism industry gets positive media coverage locally



# In your opinion, what one thing could Cheyenne and Laramie County do to become a better or world-class visitor destination?

## Downtown (18)

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- Build out downtown to live up to the image of a charming Wyoming town.
- Downtown Cheyenne restoration would have a major impact on tourism, I believe.
- Improve downtown and create a more cohesive destination for out of town tourists.
- Continue to diversify all that Cheyenne has to offer.

## Attractions (9)

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- Attract more live music, especially downtown.
- Create "signature" events/activities for non-summer months.
- Develop additional major attractions or events. Our current attractions/events (other than Frontier Days) are relatively small.
- Better locally owned restaurants and night life.

## Convention Center (7)

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- Build a multi-use facility for conventions, sporting events, fund raisers, etc.
- Major Convention Center able to hold live music, large scale trade shows.

# What are the biggest challenges we must address to improve our destination?

## Brand/Perception (15)

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- Create a unique image not continue to ride on the "Cowboy" image the state has.
- Everyone thinks there is nothing to do here, and that we pull an older age category and are missing out on the 20-35 year olds.
- The homeless and transient community gives the perception that certain areas of Cheyenne are unsafe.
- Local's image of their hometown.

## Downtown (12)

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- Diversity in dining and lodging. Small population difficult for either to be financially sound.
- Need to fill the downtown area, so many empty buildings and/or low class stores (Flair, etc.).
- Cheyenne looks terrible from I-80, we need to clean up the I-80 view shed.

## Air Service (6)

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- Air travel needs to be figured out.
- Provide more reliable air service

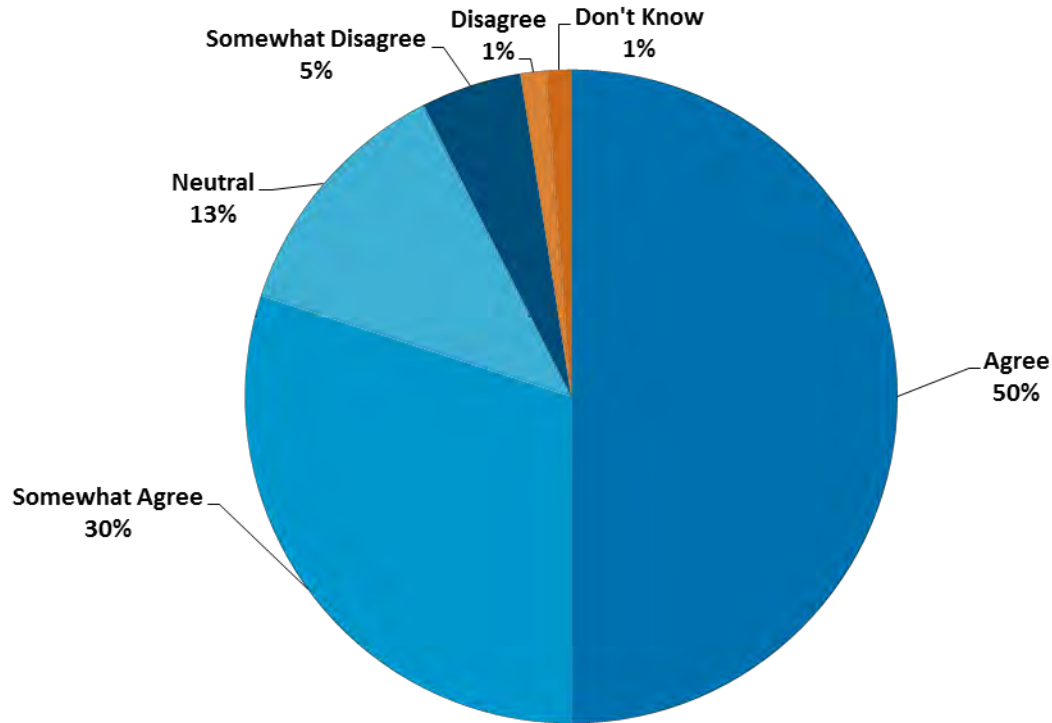
## Attractions (6)

---

- Finding ways to improve regional tourism during the off-season. Establishing more unique events during the winter will help.

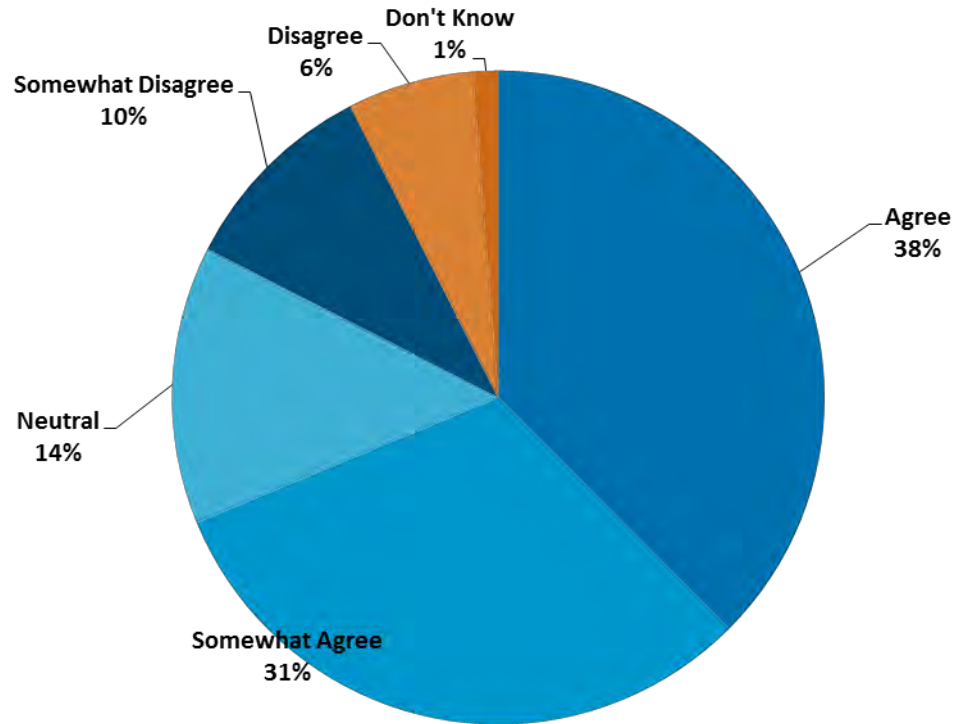
# Cheyenne needs wayfinding signs that direct visitors to top destinations within the city

- Average score: 4.19



# Homeless individuals are harming the visitor experience in downtown Cheyenne

- Average score: 3.80



# Key Takeaways

- Cheyenne currently in Voyager scenario: outperforming slightly on community support; underperforming on destination strength
- High degree of consensus in perceptions among stakeholder groups
- Most significant issues to address

## Destination

- Iconic attractions & events
- Downtown development
  - Shopping
  - Dining
- Convention center & headquarter hotel capacity
- Brand
- Wayfinding
- Wifi access
- International readiness
- Air service

## Community Support & Engagement

- Hospitality culture
- Customer service
- Workforce

Break





NEXTPractices

# Practices



# Evaluation



# Destination Strength



# Community Support & Engagement

Strong Community Engagement

Developing  
Destination

Established  
Destination



**NEXT PRACTICE**

- CSR and Sustainability
- DMO Network Model

- Industry Driven Tourism Curriculum

**BEST PRACTICE**

- Building Sense of Place
- Community Stakeholder DMO Board Members
- Hotel Generated Funding

- Local Transportation Advocacy
- Non-Hotel Generated Funding
- Strategic Planning

Weak Community Engagement

# Both Drivers

Strong Community Engagement

Developing  
Destination

Established  
Destination

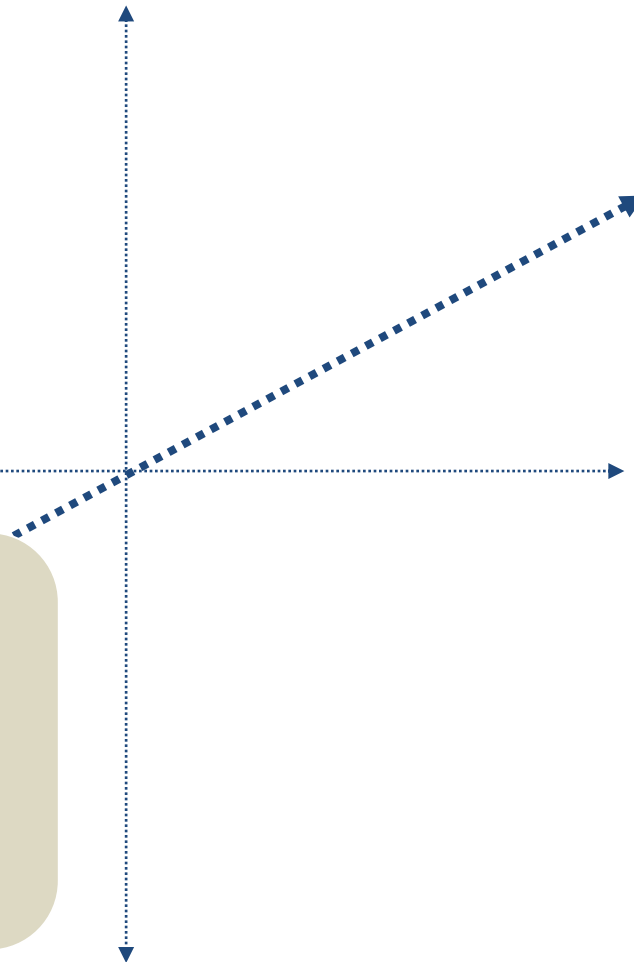
## NEXT PRACTICE

- DMO Association Development
- Shared Economy Collaboration
- Tourism Infrastructure Crowdfunding

## BEST PRACTICE

- Destination Brand Unification
- DMO Generated Events
- Formalized Economic Development
- Non-Industry Destination Advocates
- Tourism Master Planning

Weak Community Engagement



# Tourism Master Planning

## Overview

Many DMO's currently complete Strategic Plans and annual Marketing/Business Plans. In today's highly competitive and transparent marketplace, there is pressure on destinations to optimize attractions and visitor experiences.

A Tourism Master Plan is a long range blueprint for how the tourism experience can contribute to the social and economic "quality of place" for the destination community. The plan sets forth the vision for what the destination aspires to become, and outlines a roadmap for how it will get there. The process of developing the plan involves significant consultations with the community and its customers to envision, activate and manage a plan for sustainable, shared business success.

Master plans, required for many years at airports, require a clear and transparent process which includes two critical elements:

- An assessment of the destination and opportunities for the region
- Comprehensive and diverse consultation with tourism industry and community stakeholders.

The length and cost of this project is largely affected by the amount of consultation and analysis incorporated into the process.

The final master plan should include a vision, targets, goals, strategic initiatives, and a implementation plan.

### Pros

- Can generate a significant amount of community support and understanding of the industry
- Can establish a vision and action-oriented plan which will improve the destination, critical to the long-term success of any tourism market
- Aligns the tourism industry with other critical urban planning and community initiatives

### Challenges

- May require a significant amount of resources to develop (staff and cost)
- Can create further divisions in a community if the process is not carefully planned out and executed

## Approach

### Conduct Market Assessment

Analyze industry trends, asset mapping and competitive assessment



### Hold Consultations

Including one-on-one interviews, focus groups and workshops/open house



### Set Visioning & Goal Setting

Include strategic analysis, vision, targets and goals



### Create Implementation Plan

Strategic initiatives, resources and timelines

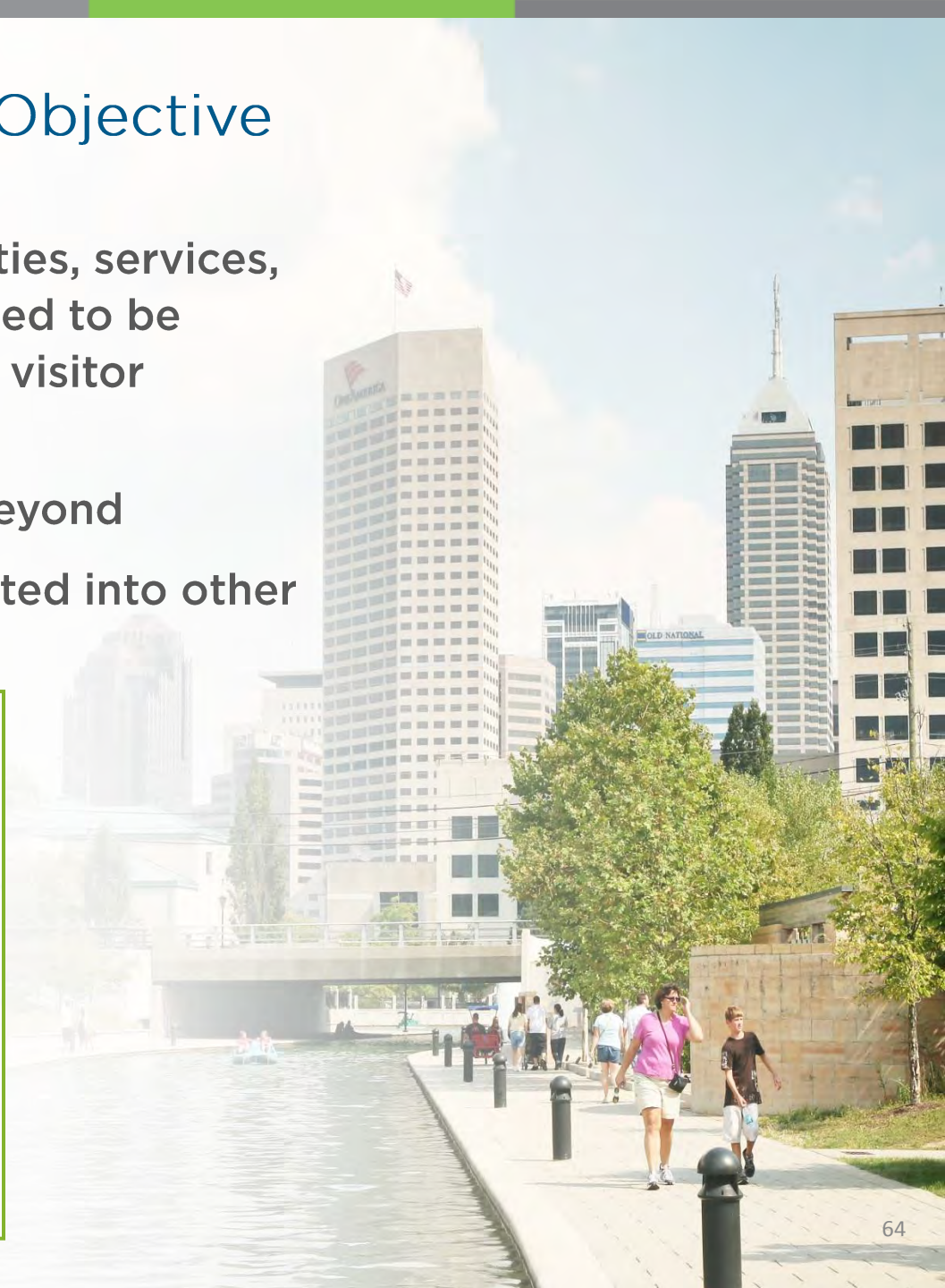
### Impact on Community Support & Engagement / Destination Strength

CS&E



# Tourism Master Plan - Objective

- Focus on infrastructure, facilities, services, attractions & events which need to be developed to improve overall visitor offering & experience
- Time frame of 10 years and beyond
- Coordinated with and integrated into other planning initiatives underway





# Tourism Master Plan - Core Elements



Vision

Targets

Strategic Goals

Initiatives

# Demand Generators and Experience Enhancers



Developing and marketing a tourism destination requires us to differentiate between two different types of products

Demand Generators



*What is driving incremental travel?*



Experience Enhancers



*Once they're here, what is going to keep them busy and want to come back?*



# Project Overview



## EXTENSIVE ANALYSIS

- Industry Trends
- Competitive Analysis
  - Asset Mapping
- Customer Advisory Boards

## COMMUNITY ENGAGEMENT

- **660** Face to Face Interactions
  - 6 Regional Workshops
  - 5 Asset Mapping Workshops
- **1,700** responses Public Sentiment Survey



**VISIONING WORKSHOP**



**VALIDATION SESSIONS**



**BOARD RETREAT**



**ROLLOUT AND IMPLEMENTATION**

# Benefits

- Clear action-oriented plan to optimize visitor experience in destination
- Improved relationships with other community and business groups
- Critical integration and input into urban planning initiatives
- Stronger collaboration and cooperation among DMO's in the region
- Improved awareness and public support for the important role of this industry



# Breakout Groups

- 6 breakout groups
  - Select a reporter to complete form and report back to plenary
- 
- 1) What are 3 most important issues which must be addressed in Cheyenne and Laramie County during the next 3 years?
  - 2) What is the most important action which Visit Cheyenne should take in the next year?

# Breakout Group Feedback

	1	2	3	4	5	6
Issues	<ul style="list-style-type: none"> <li>Downtown development</li> </ul>	<ul style="list-style-type: none"> <li>Downtown beautification</li> </ul>	<ul style="list-style-type: none"> <li>Downtown revitalization</li> </ul>		<ul style="list-style-type: none"> <li>Downtown development</li> </ul>	<ul style="list-style-type: none"> <li>Downtown development</li> </ul>
	<ul style="list-style-type: none"> <li>Key events and attraction promotion</li> </ul>	<ul style="list-style-type: none"> <li>Product development</li> </ul>	<ul style="list-style-type: none"> <li>Attraction development</li> </ul>			<ul style="list-style-type: none"> <li>Product development</li> </ul>
	<ul style="list-style-type: none"> <li>Local community support</li> </ul>			<ul style="list-style-type: none"> <li>Millennial involvement in community</li> </ul>	<ul style="list-style-type: none"> <li>Community support &amp; development</li> </ul>	
			<ul style="list-style-type: none"> <li>Brand</li> </ul>	<ul style="list-style-type: none"> <li>Brand</li> </ul>		<ul style="list-style-type: none"> <li>Brand building</li> </ul>
					<ul style="list-style-type: none"> <li>Air access</li> </ul>	
				<ul style="list-style-type: none"> <li>Convention centre</li> </ul>		
		<ul style="list-style-type: none"> <li>Workforce training</li> </ul>				
Action	<ul style="list-style-type: none"> <li>Tourism Master Plan</li> </ul>		<ul style="list-style-type: none"> <li>Tourism Master Plan</li> </ul>	<ul style="list-style-type: none"> <li>Tourism Master Plan</li> </ul>	<ul style="list-style-type: none"> <li>Tourism Master Plan</li> </ul>	
		<ul style="list-style-type: none"> <li>Promotion, training and lobbying</li> </ul>				<ul style="list-style-type: none"> <li>Promotion</li> </ul>

Thank you!

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# Closing Remarks

Visit Cheyenne