

# DESTINATION NEXT

Cheyenne, WY

October 3, 2018



NEXTFACTOR 

**Darren Rudloff**

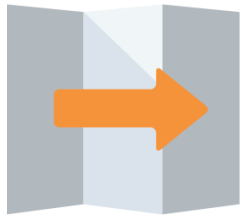
# Paul Ouimet



# DestinationNEXT

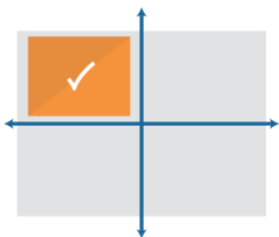
## Vision:

Provide destination organizations with a powerful assessment tool and practical actions and strategies for sustainable success in a dramatically changing world



## Futures Study

- 75 trends & 55 strategies
- 433 respondents in 52 countries



## Scenario Model & Assessment Tool

- 4 unique scenarios
- 178 detailed assessments in 11 countries



# Today's Objectives

1. Present Futures Study on key trends in industry
2. Review assessment results for Cheyenne
3. Breakout groups



# Futures Study



# Top Trends 2014



**Smart  
Technology**



**Social Media**



# Engagement

Consider, every minute of the day:

**3.5 million search queries**

on Google (60% on mobile)

**694,000 mobile videos**

viewed on YouTube (consumers recall video 4:1 over editorial)

**66,000 images**

posted on Instagram (48% of people use to help choose travel destinations)



Source: Internet Live Stats; Brand Watch

# TripAdvisor

- Founded in 2000
- Largest travel site in the world
- 456 million monthly unique users / 661 million reviews and opinions
- 72% of hotel guests worldwide visit the site before booking online

## Travelers' Choice: Top hotels



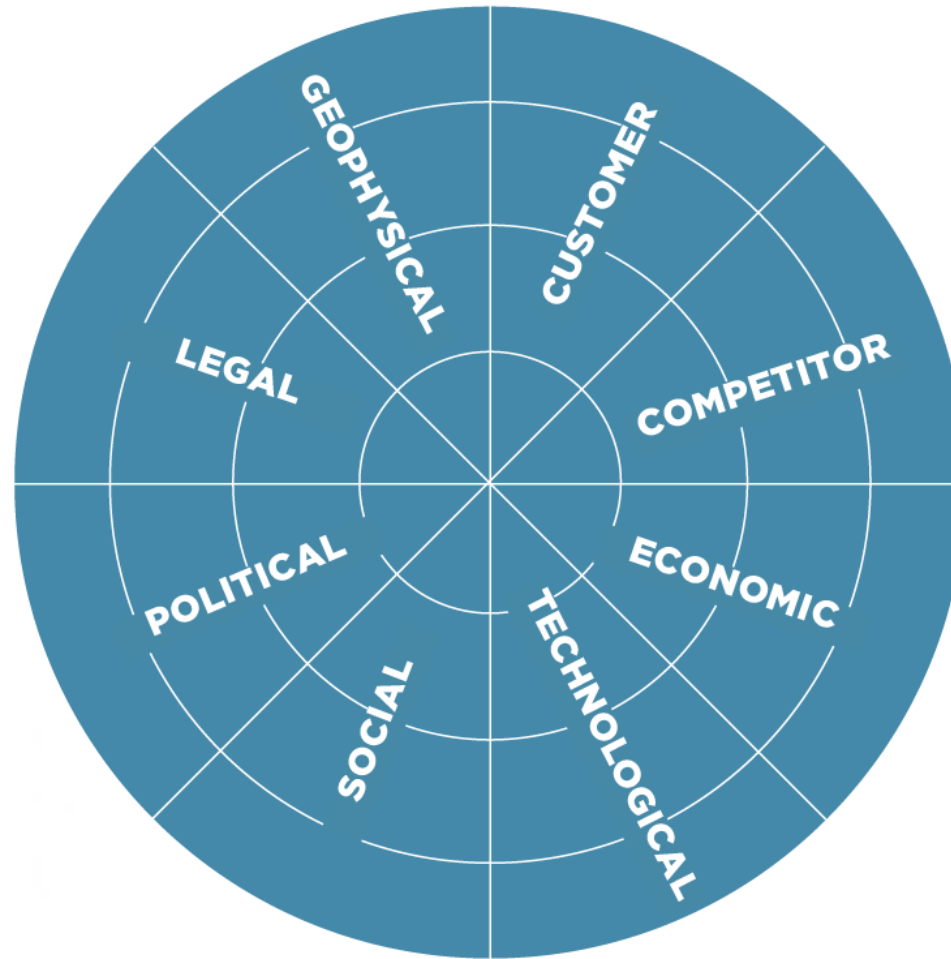
# Advisory Panels





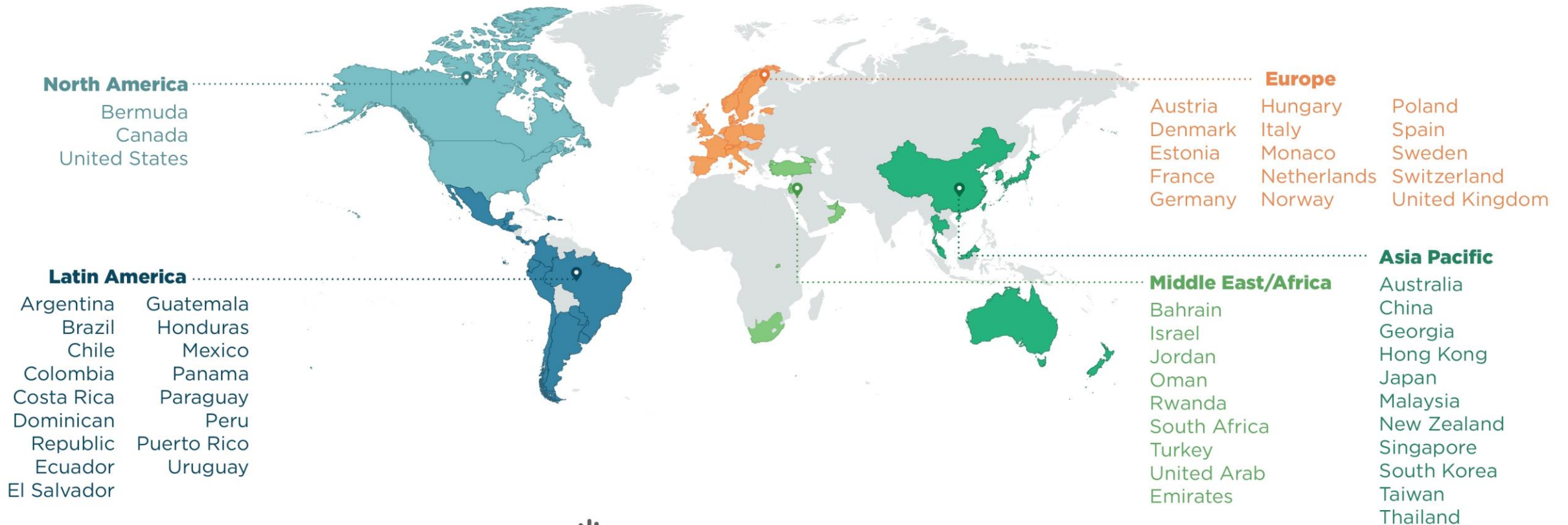
# Strategic Radar Map

**75**  
Trends



**55**  
Strategies

# We Listened to You



 **433 participants**

 **52 countries**

# KEY TRENDS



**DESTINATIONS**  
INTERNATIONAL



# Top 25 Trends & Strategies 2017

12

New Trends

10

New Strategies





Personalized, unique and authentic experiences



# Atlas Obscura

- Over 14,000 unique places
- Atlas published in 2016
- 1 million page views per week







# Cit   M  moire

Montreal, Canada

(<5 million)

- *Outdoor video projection experience at dusk*
- *Attraction runs year-round*
- *Downloadable app with soundtrack and historical context*
- *Unique historical depiction of Old Montreal*







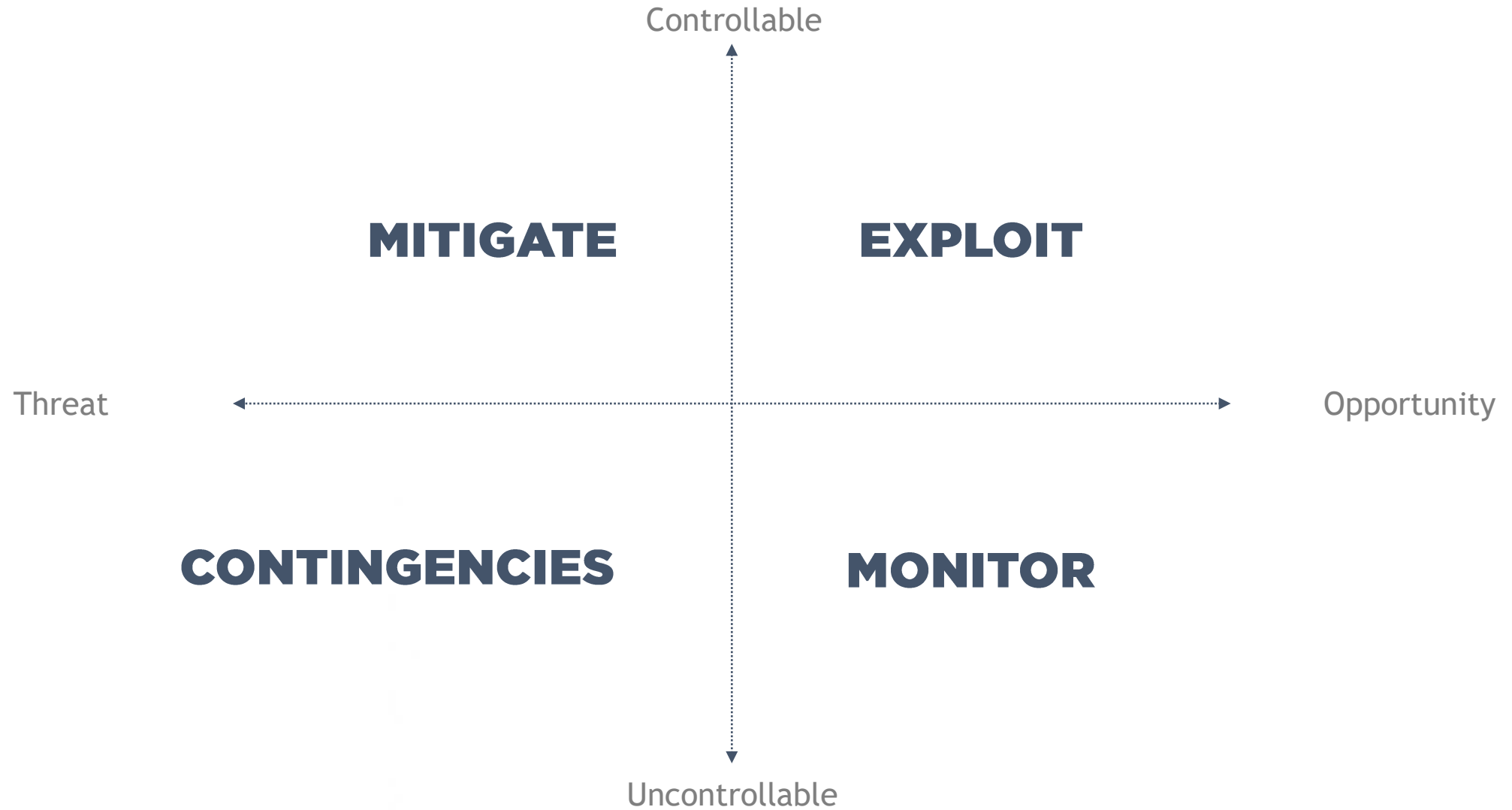
Less sales, more strategic partnerships





Sustainable tourism

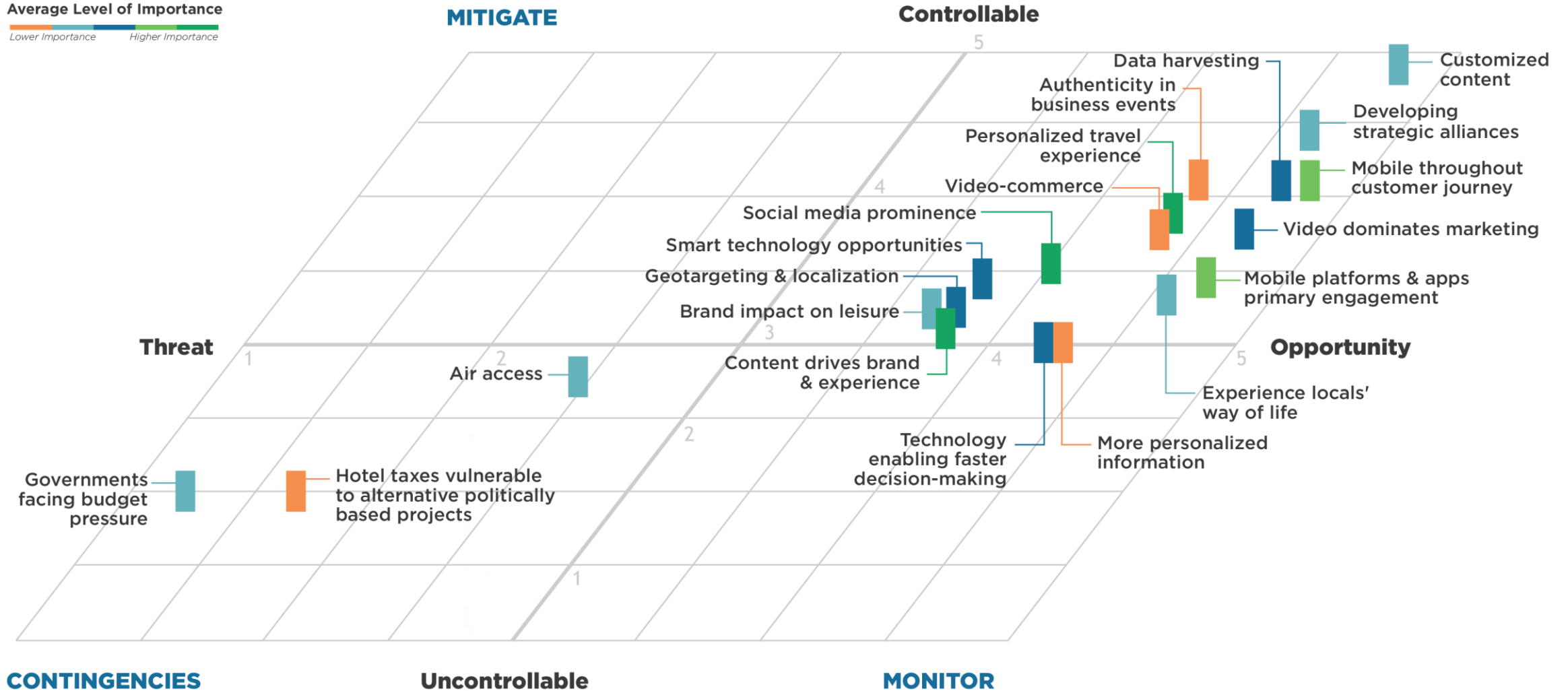
# Future Map





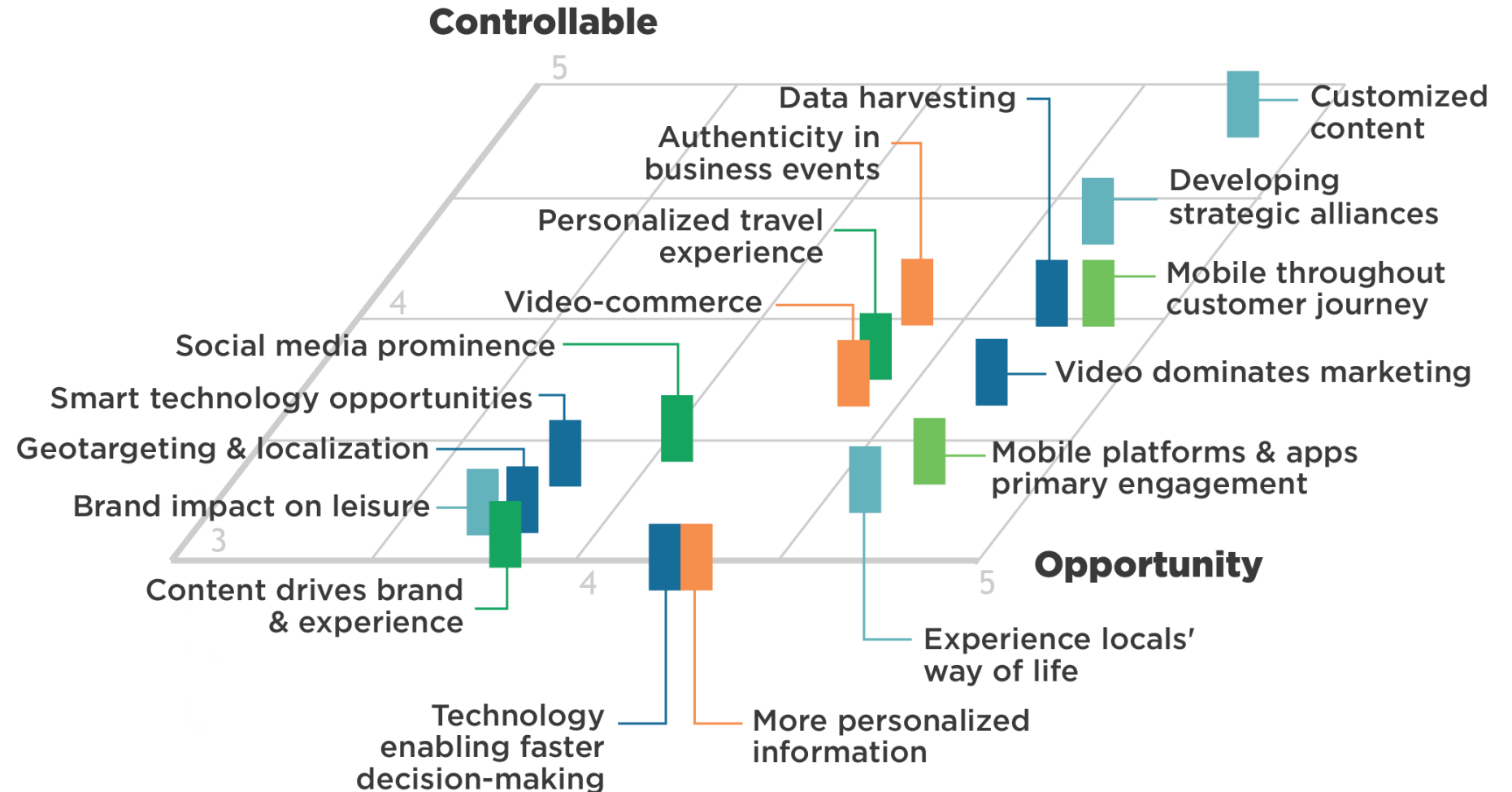
# Future Map – Top 25 Trends

Average Level of Importance  
Lower Importance Higher Importance



# Future Map – Top 25 Trends

Average Level of Importance





# Transformational Opportunities



## #1: Broadcast to Engagement

Interacting with and leveraging the new marketplace



## #2: Brand Building

Building and protecting the destination brand



## #3: Collaboration & Partnerships

Evolving the DMO business model



## Chat: AI-Powered Conversational Commerce

- Guests using the “Rose” bot at The Cosmopolitan of Las Vegas spend 30%+ more on-property
- AI helps brands personalize the travel experience more
- AI is the future of e-commerce and customer loyalty



# The Rise of the 3D Internet

- Augmented reality is merging the physical and digital worlds
- Amazon offers augmented shopping with menu ideas at Whole Foods
- Apple is launching AR eyewear in 2019/20





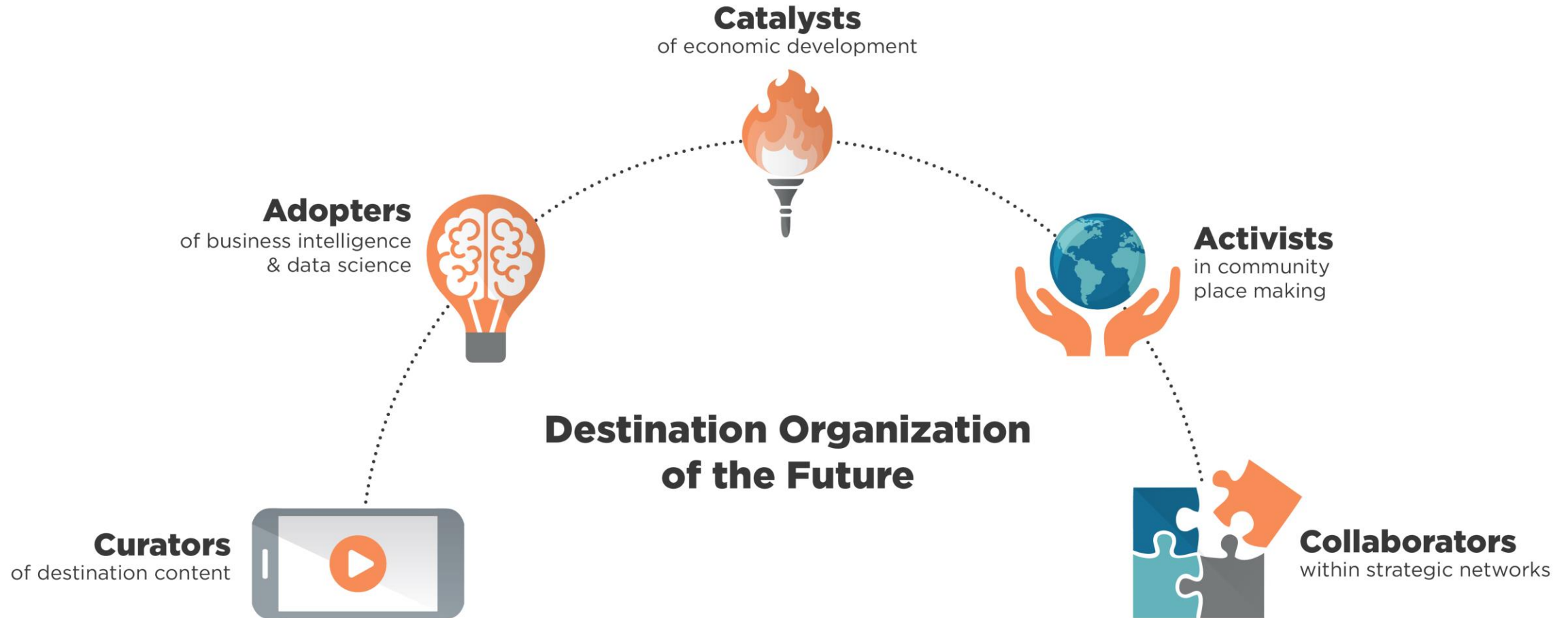
# Everything, Everywhere is 'Smart'

- Carnival's Ocean Medallion wearable was developed by the people who designed Disney's MagicBand
- Will eventually scale to hotels and destinations





# Re-engineering the Destination Organization



# Scenario Model



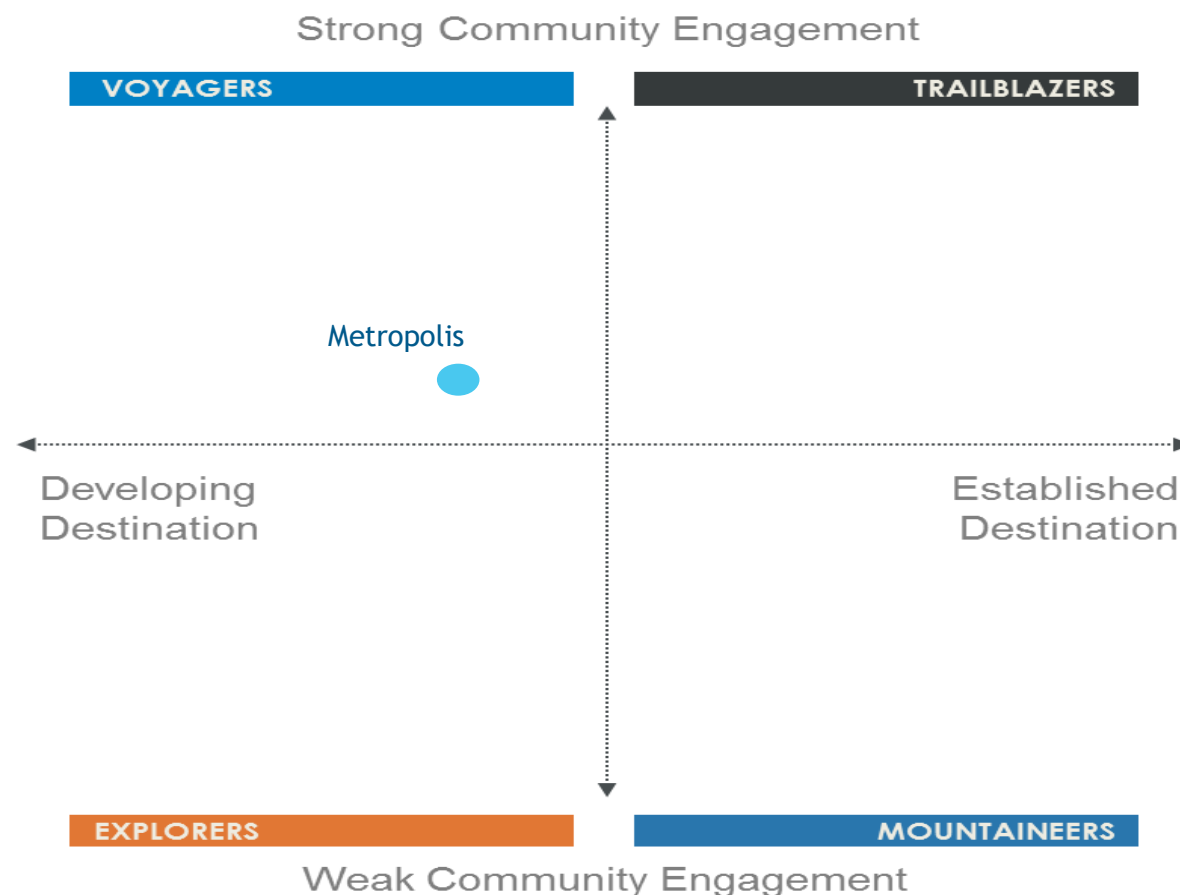
# Scenario Model



# 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



**Destination  
Performance**



**Brand**



**Accommodation**



**Attractions and  
Entertainment**



**Conventions & Meeting  
Facilities**



**Air Access**



**Events**



**Sporting and  
Recreation Facilities**



**Communication &  
Internet Infrastructure**



**Mobility and Access**



# Community Support & Engagement Variables



**Effective DMO  
Governance Model**



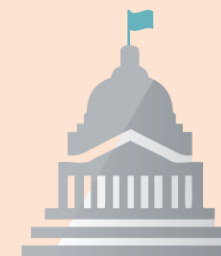
**Membership Strength  
& Support**



**Industry Support**



**Local Community  
Support**



**Policy and  
Regulatory Environment**



**Workforce**



**Hospitality Culture**



**Regional Cooperation**



**Funding Support &  
Certainty**



**Economic Development**

# Destination Assessments



**350**

destinations from  
18 countries



**178**

detailed  
assessments  
completed in 11  
countries



**70**

underway or  
planned,  
including 4 other  
countries



**60**

in discussion,  
including  
14 other countries

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USA, Canada,  
Mexico, Switzerland,  
Colombia, Korea  
Guatemala, Taiwan,  
Denmark, Brazil  
Australia

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Dominican Republic, El  
Salvador, Ecuador  
South Africa

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Peru, Argentina, Dubai,  
Germany, Honduras, Chile,  
New Zealand, United  
Kingdom, Thailand,  
Micronesia,  
Philippines, Russia, Ghana,  
Nigeria



# United States

DESTINATION  
**NEXT**



\* States shaded for state-wide assessment

# Regional Assessments



**Northwest Florida  
Tourism Coalition**

**South Africa  
Convention Bureau**



# DESTINATION NEXT

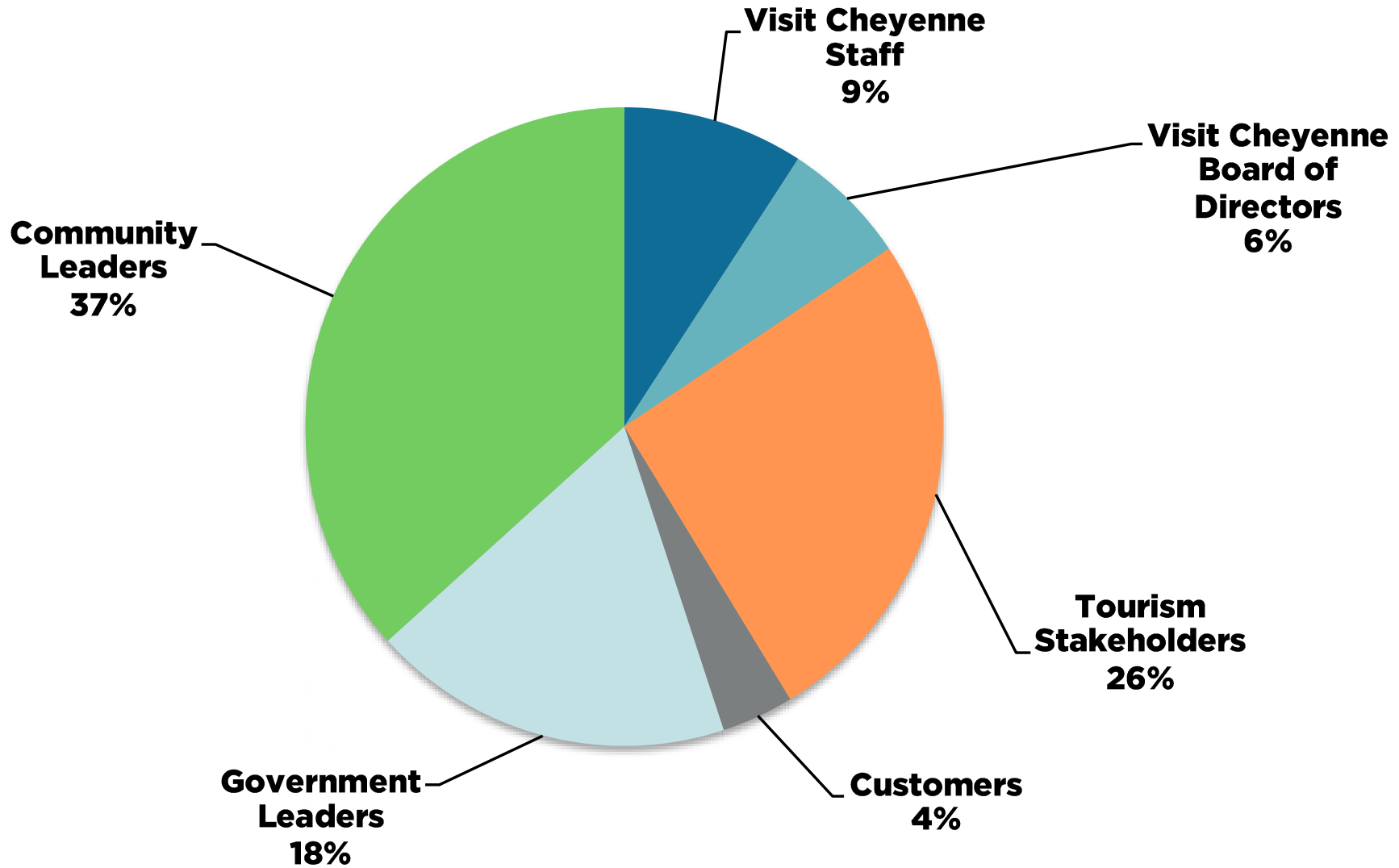
Multi-User Online Diagnostic  
Tool Results:

Cheyenne, WY

October 03, 2018

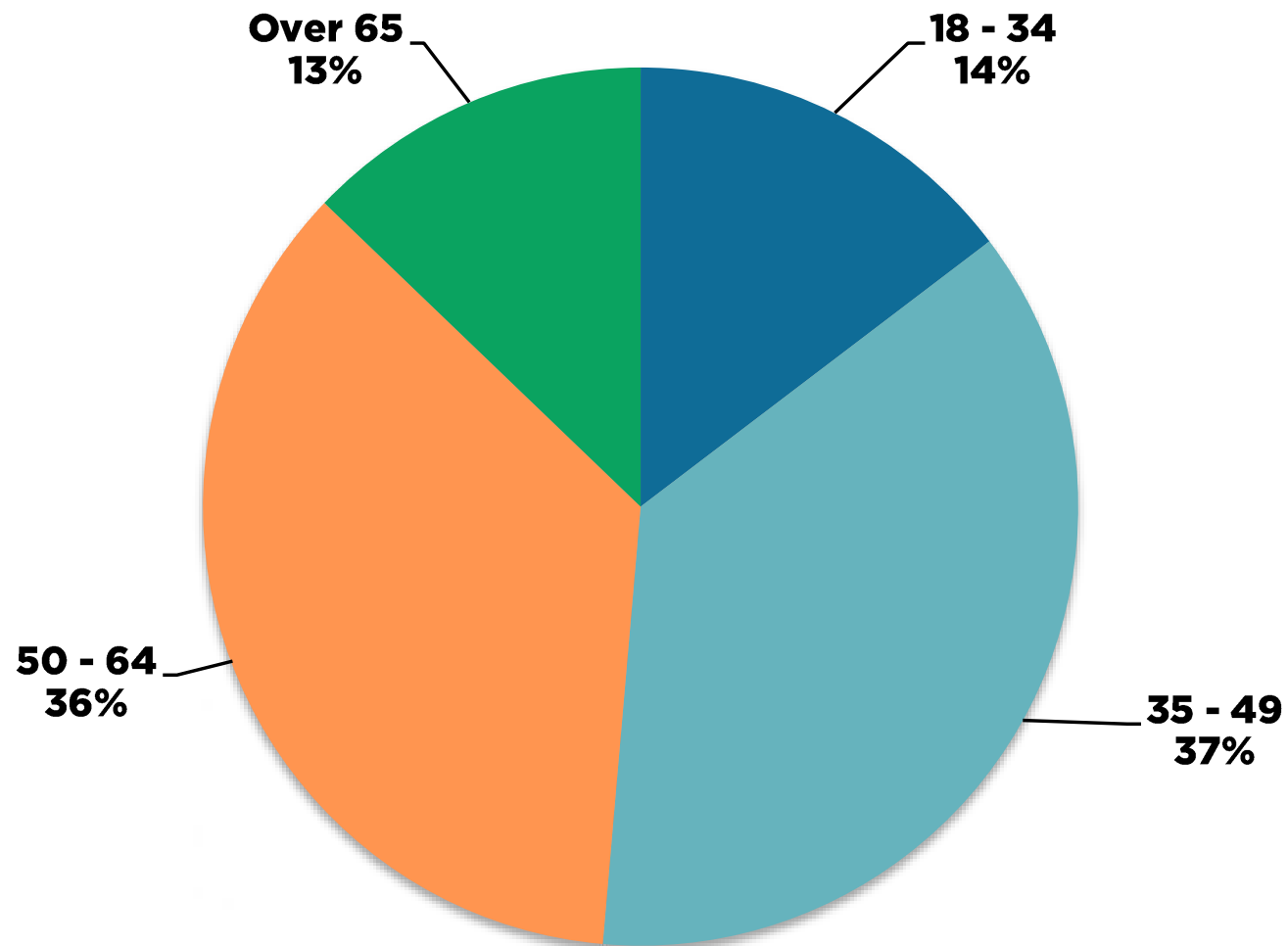


# 109 Participants

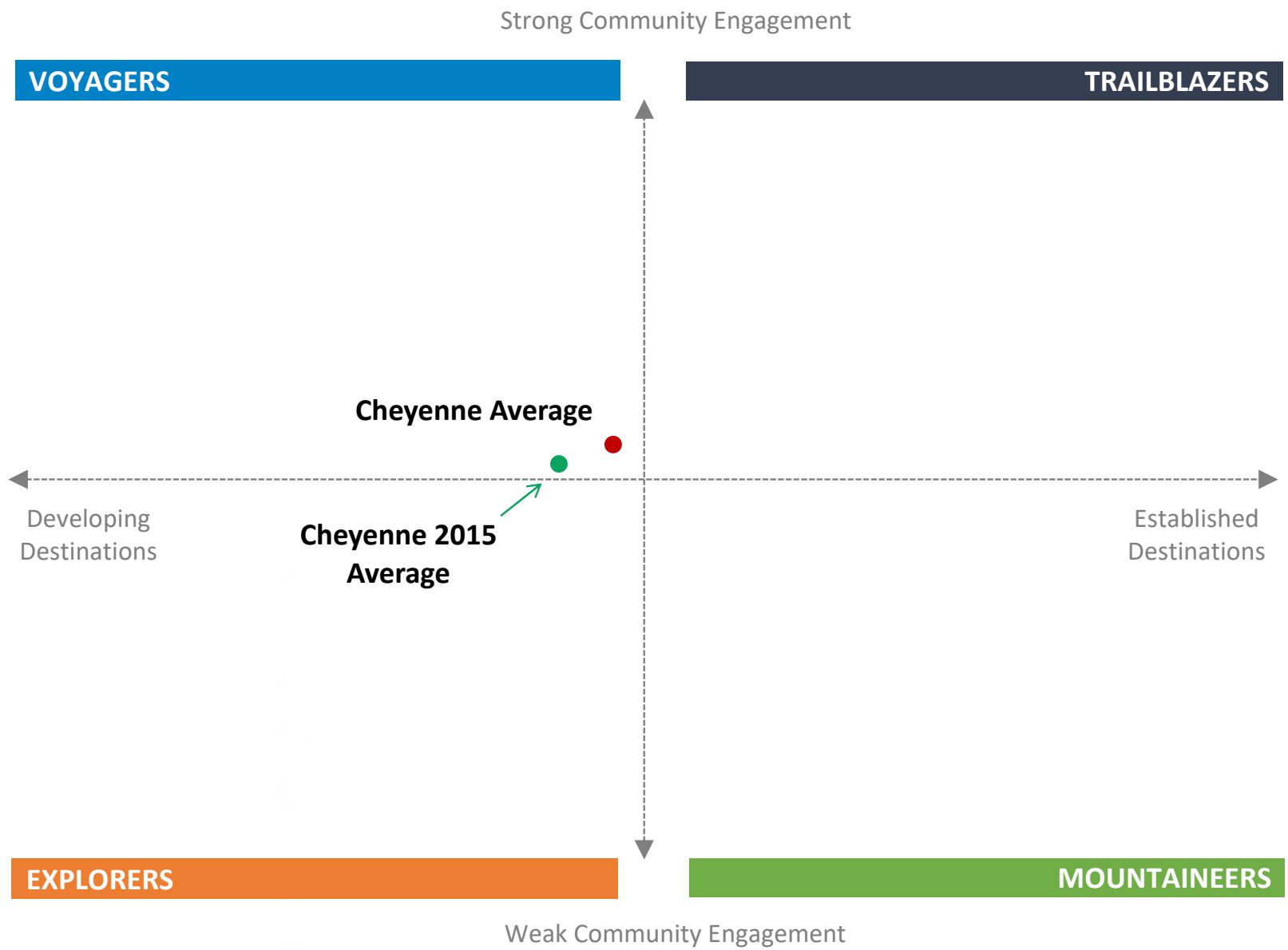




# Age Demographic



# Cheyenne, WY Overall Assessment – Compared to 2015

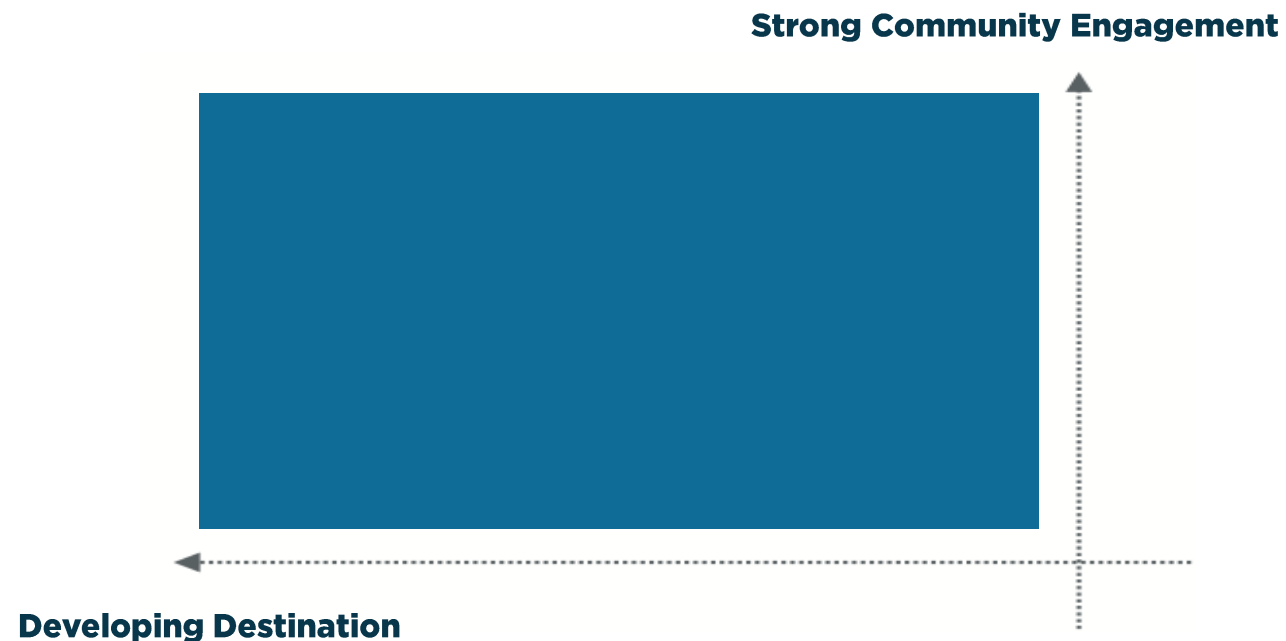


# Voyagers

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

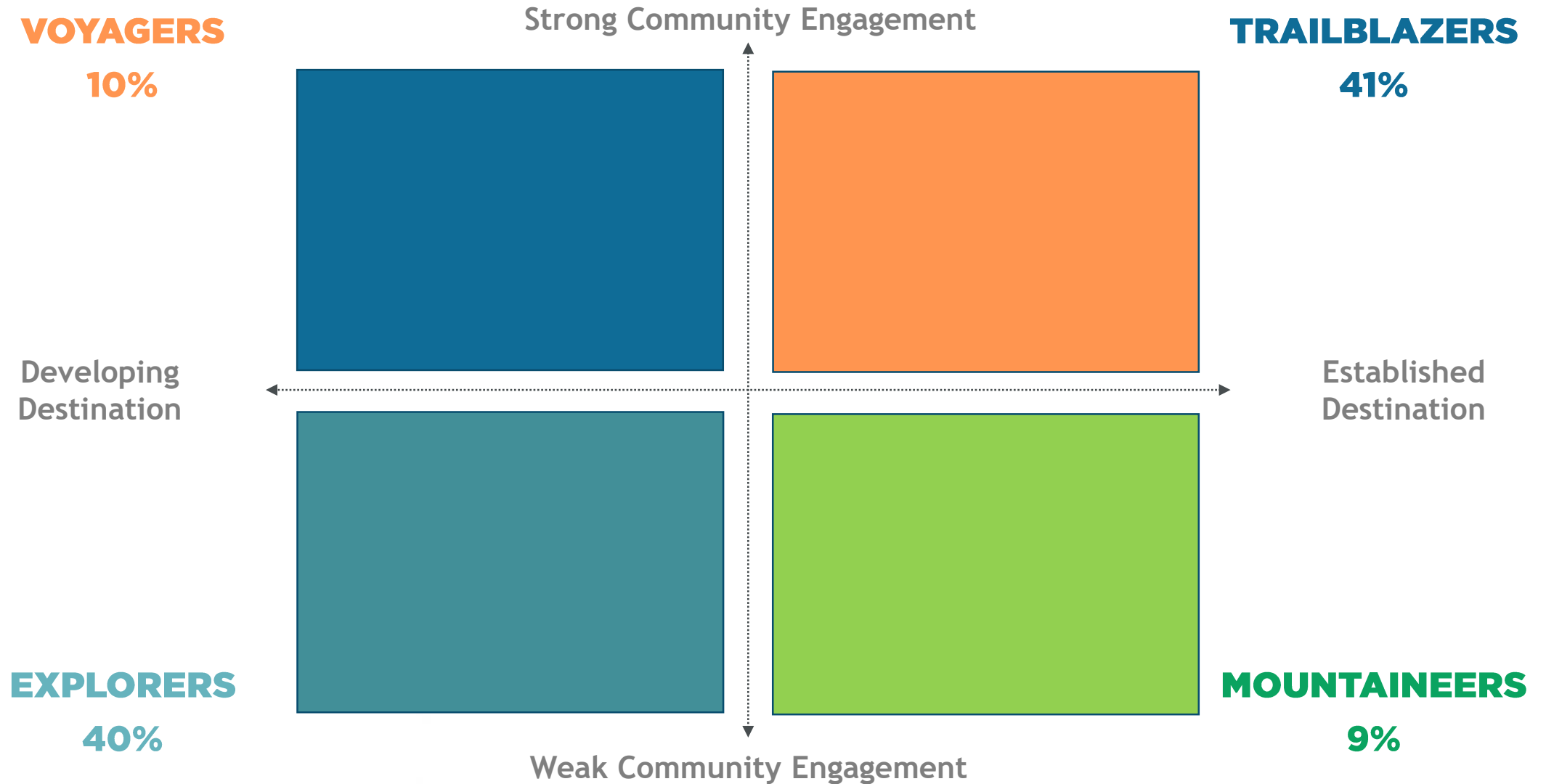
## Key Strategic Challenges

- **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**

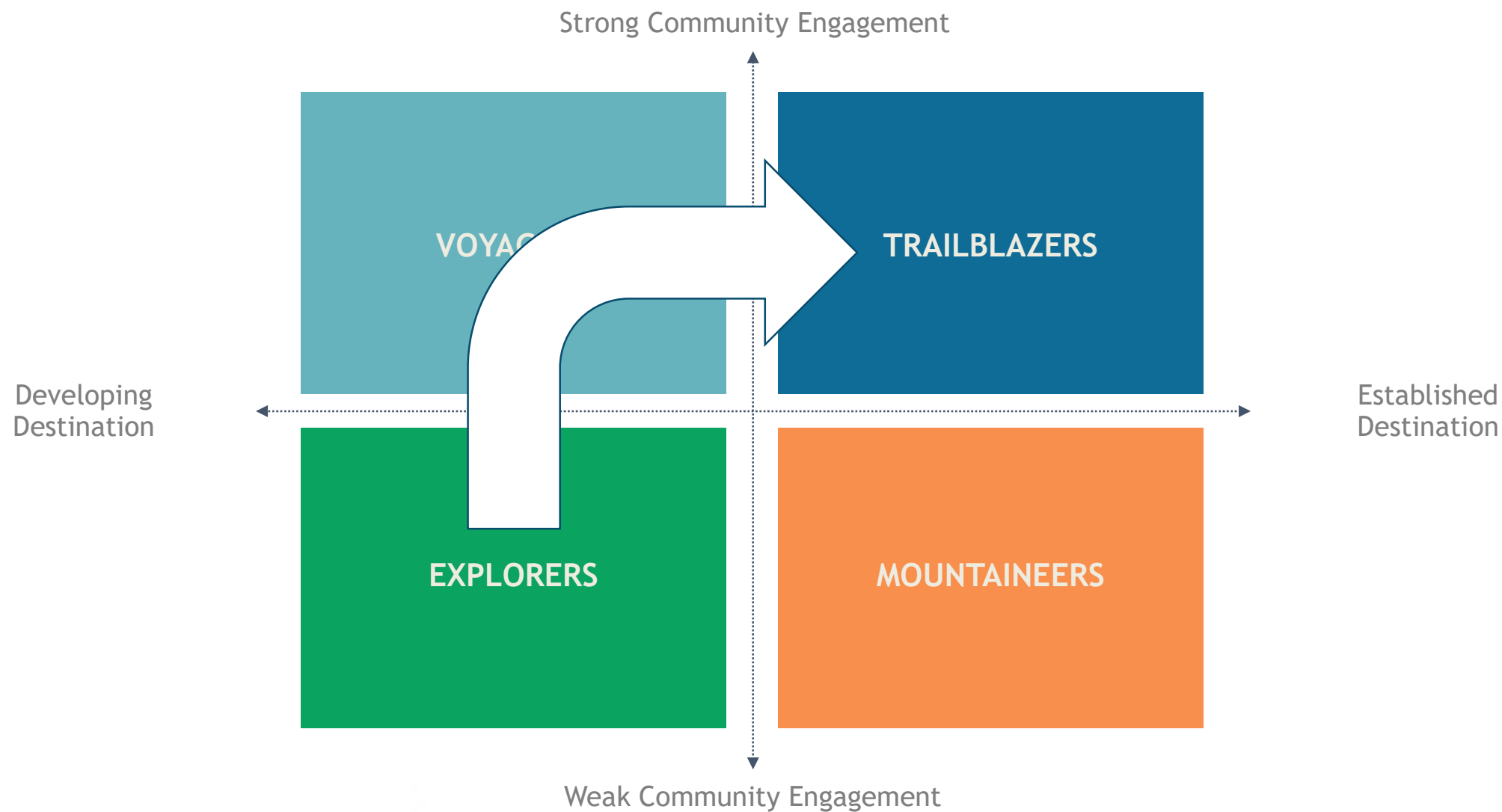




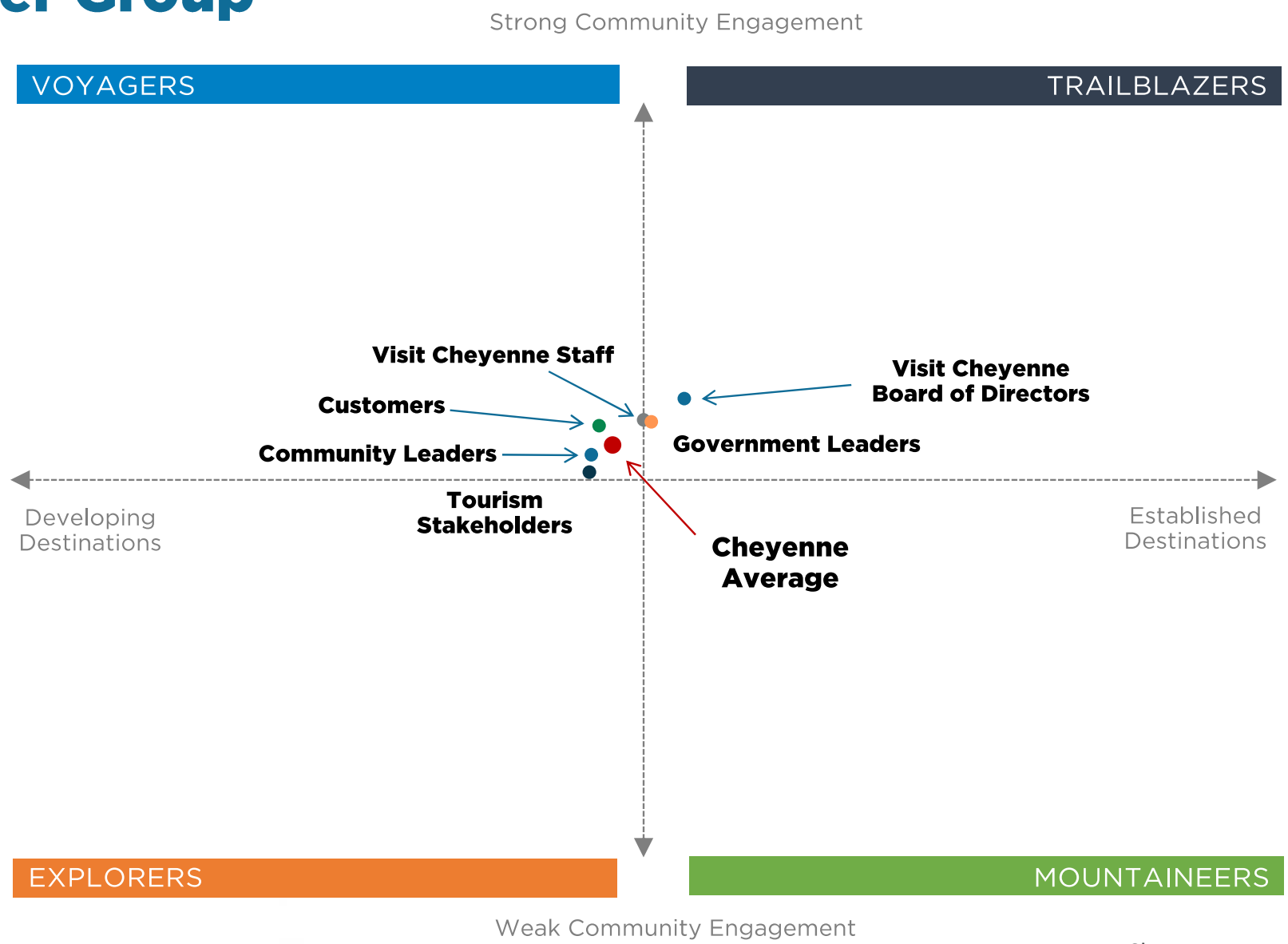
# Scenario Model



# Becoming a Trailblazer

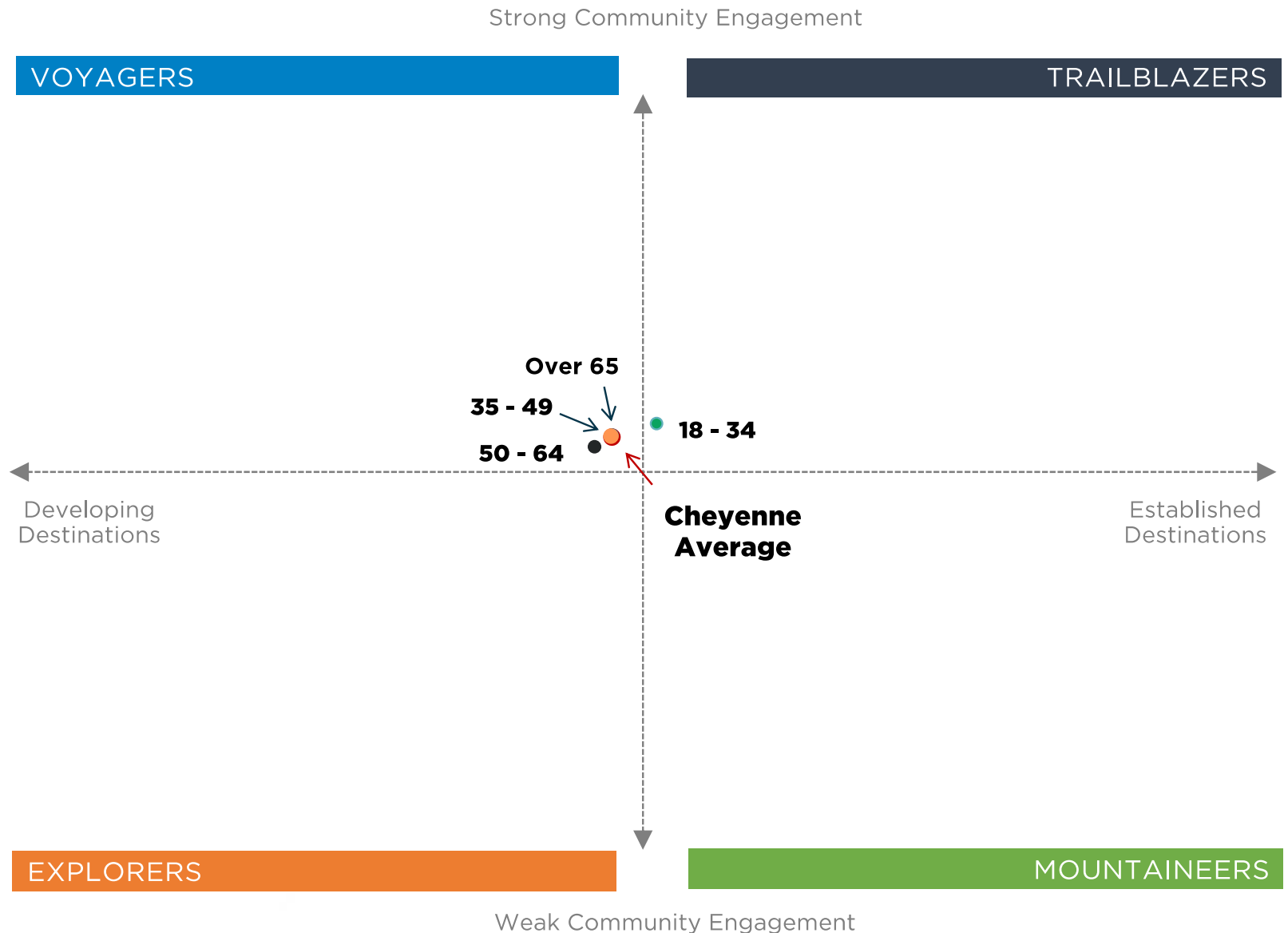


# Cheyenne, WY Overall Assessment - Stakeholder Group





# Cheyenne, WY Overall Assessment – Age Group



# Destination Strength Rankings – Global Averages



## Relative Importance



Attractions & Entertainment

1<sup>st</sup>



Accommodation

2<sup>nd</sup>



Brand

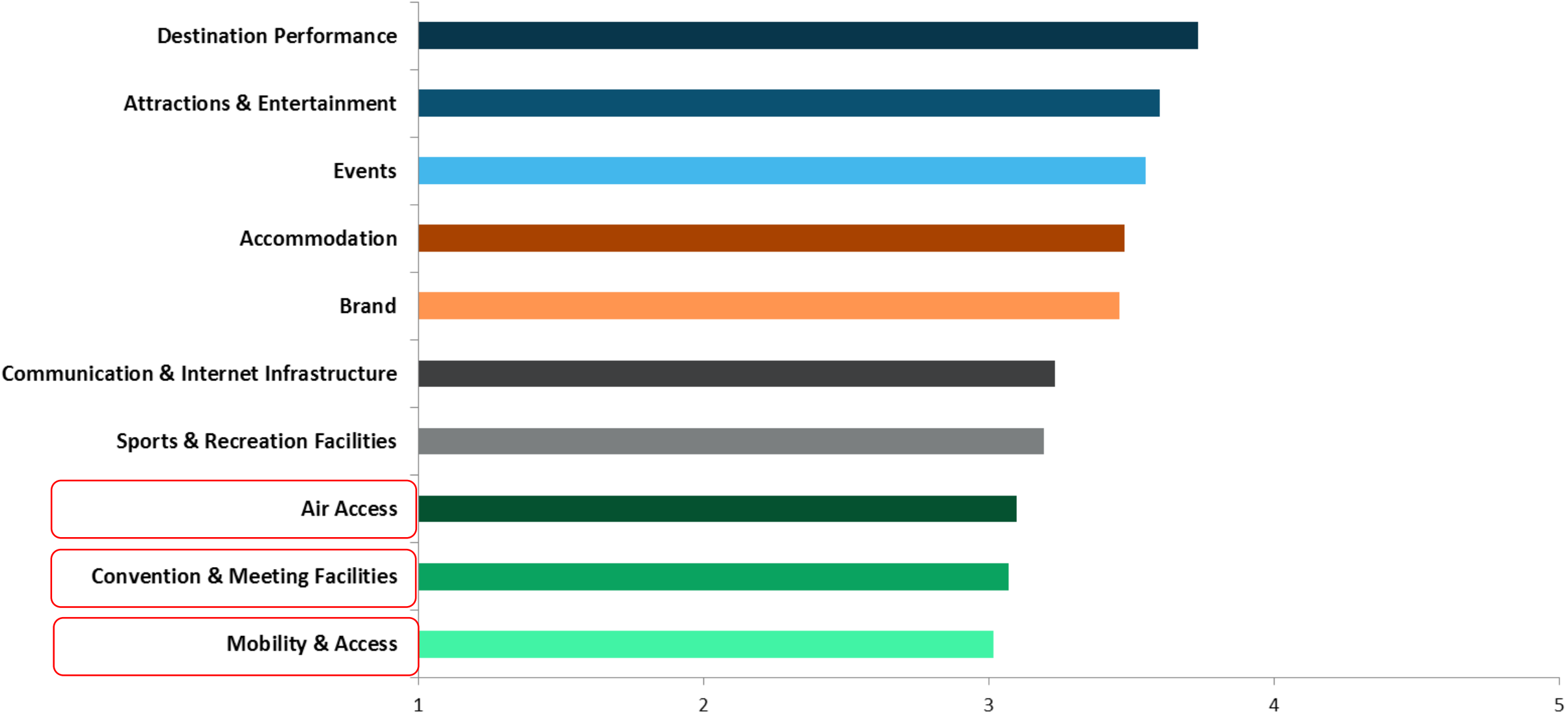
3<sup>rd</sup>



Mobility & Access

4<sup>th</sup>





# Destination Strength Performance





# Destination Strength Rankings – Cheyenne, WY



		Relative Importance	Perceived Performance
	Attractions & Entertainment	1 <sup>st</sup>	7 <sup>th</sup>
	Brand	2 <sup>nd</sup>	3 <sup>rd</sup>
	Destination Performance	3 <sup>rd</sup>	1 <sup>st</sup>
	Convention & Meeting Facilities	4 <sup>th</sup>	9 <sup>th</sup>

# Destination Strength – Report Card

Variable	Relative Importance (0-100%)			Perceived Performance (1-5 scale)		
	Industry Average	Cheyenne Average	Standard Deviation	Industry Average	Cheyenne Average	Standard Deviation
Attractions & Entertainment	10.8%	10.9%	1%	3.60	3.22	0.59
Brand	10.4%	10.8%	0%	3.46	3.36	0.50
Destination Performance	10.0%	10.4%	0%	3.74	4.19	0.45
Convention & Meeting Facilities	9.8%	10.4%	0%	3.07	2.92	0.74
Communication & Internet Infrastructure	10.0%	10.1%	1%	3.23	2.99	0.75
Mobility & Access	10.1%	10.1%	0%	3.02	3.28	0.49
Accommodation	10.5%	9.9%	0%	3.47	3.84	0.62
Events	9.8%	9.6%	0%	3.55	3.26	0.56
Air Access	9.1%	9.4%	1%	3.10	2.18	0.76
Sports & Recreation Facilities	9.5%	8.6%	1%	3.19	3.35	0.48

DESTINATION STRENGTH - Cheyenne	3.27
INDUSTRY AVERAGE DESTINATION STRENGTH	3.36

## RESULTING SCENARIO VOYAGERS

### Note

**Green shading signifies that the destination outperformed the industry average by greater than 0.2.**

**Yellow shading signifies that the destination underperformed the industry average by greater than 0.2 but less than 0.4.**

**Red shading signifies that the destination underperformed the industry average by greater than 0.4.**

# Destination Strength – Stakeholder Report Card

Variable	Perceived Performance (1-5 scale)						
	Cheyenne Average	Visit Cheyenne Staff	Visit Cheyenne Board of Directors	Tourism Stakeholders	Customers	Government Leaders	Community Leaders
Attractions & Entertainment	3.22	3.47	3.58	3.08	3.12	3.36	3.12
Brand	3.36	3.49	3.52	3.26	3.33	3.50	3.30
Destination Performance	4.19	4.33	4.37	4.05	4.26	4.30	4.17
Convention & Meeting Facilities	2.92	3.12	3.46	3.13	2.88	2.89	2.63
Communication & Internet Infrastructure	2.99	2.92	3.25	2.86	2.93	3.21	2.95
Mobility & Access	3.28	3.37	3.24	3.35	3.13	3.29	3.23
Accommodation	3.84	3.82	4.02	3.80	3.85	3.89	3.81
Events	3.26	3.42	3.54	3.11	3.35	3.45	3.18
Air Access	2.18	2.11	2.57	1.82	2.09	2.43	2.26
Sports & Recreation Facilities	3.35	3.42	3.33	3.35	3.28	3.52	3.26
DESTINATION STRENGTH - Cheyenne							3.27
INDUSTRY AVERAGE DESTINATION STRENGTH							3.36
RESULTING SCENARIO							VOYAGERS

## Note

**Green shading signifies that the stakeholder group outperformed the destination average by greater than 0.2.**

**Yellow shading signifies that the stakeholder group underperformed the destination average by greater than 0.2 but less than 0.4.**

**Red shading signifies that the stakeholder group underperformed the destination average by greater than 0.4.**



# Destination Strength – Comparison to 2015 Assessment

DESTINATION  
**NEXT**

2015 Assessment

2018 Assessment



Attractions & Entertainment

3.19

3.22



Brand

3.32

3.36



Destination Performance

4.22

4.19



Convention & Meeting Facilities

2.72

2.92



Communication & Internet Infrastructure

3.09

2.99



Mobility & Access

2.92

3.28



Accommodation

3.70

3.84



Events

3.04

3.26



Air Access

1.41

2.18



Sports & Recreation Facilities

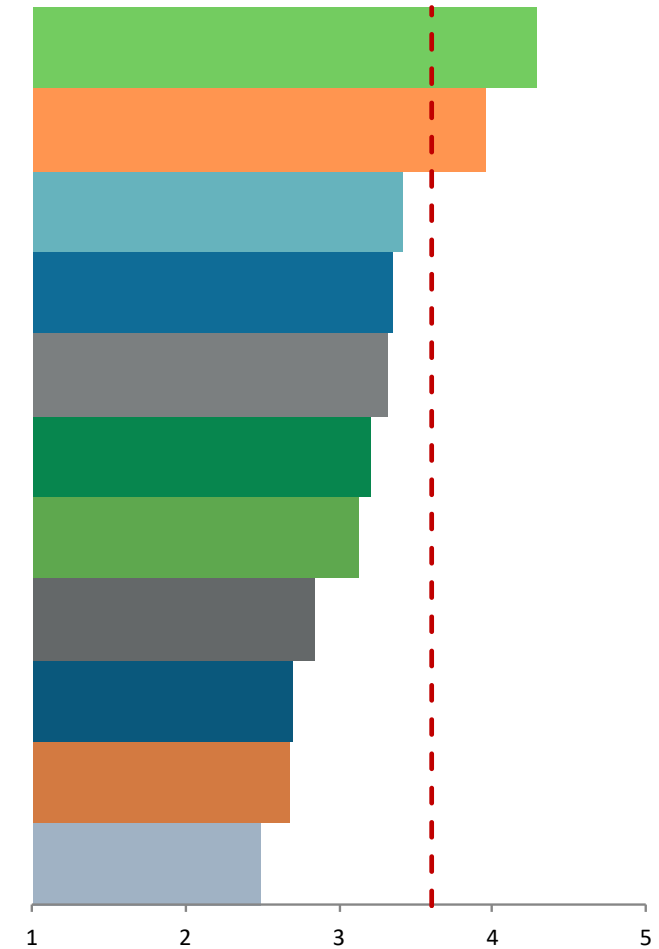
2.58

3.35



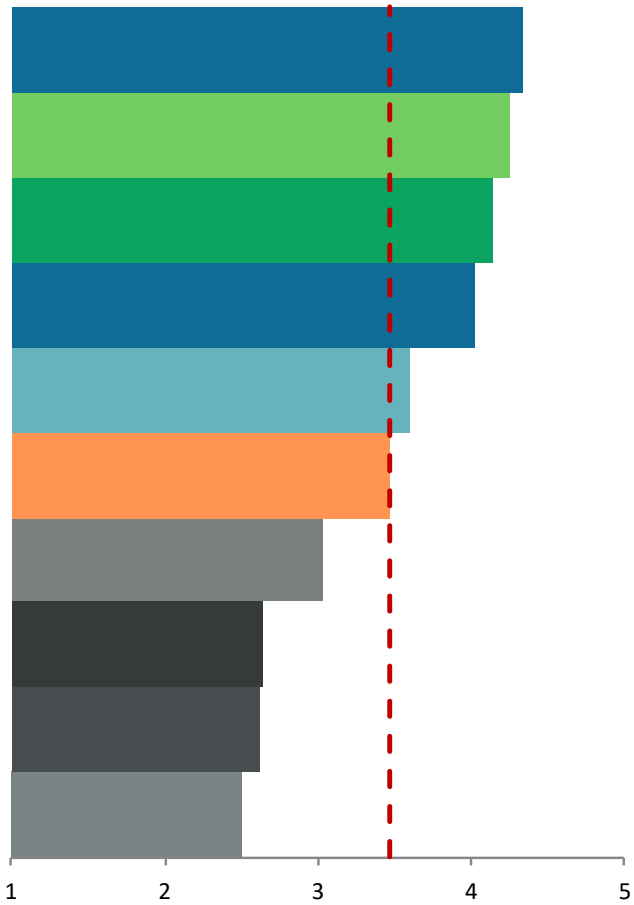
# Attractions & Entertainment

- Cheyenne Frontier Days supports the destination's brand and encourages visitors to stay longer
- Wide diversity of parks and bike trails
- Cheyenne Depot/Downtown supports the destination's brand and encourages visitors to stay longer
- High-quality arts and cultural attractions
- Has an assortment of authentic and unique attractions and entertainment opportunities
- Has unique and vibrant neighborhoods that are attractive and accommodating to visitors
- State Capitol/State Museum supports the destination's brand and encourages visitors to stay longer
- Has large, famous attractions that cause people to stay longer
- Has unique and high-quality dining options
- Cheyenne area offers diverse and high-quality shopping
- Downtown offers diverse and high-quality shopping



# Brand

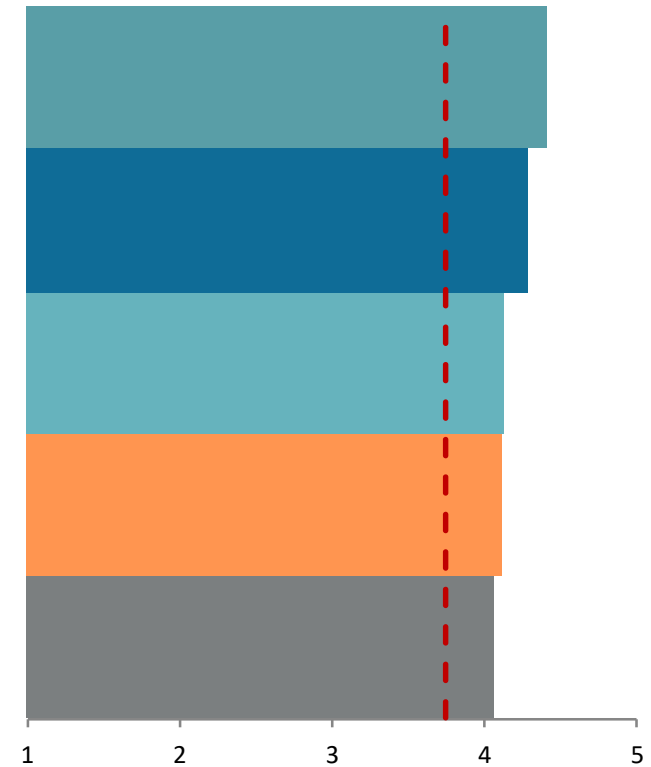
- Main iconic image is wellness
- Tourism industry leverages social media/press coverage to support the brand
- Is known for being safe, clean and secure for visitors
- Has an established brand that is simple, memorable and market-tested
- Appeals to a wide range of visitors
- Is known as being healthy and an outdoor, active city
- Is known for having a lot of things to see and do
- Is known as an innovative destination
- Is known for being an environmentally conscious and sustainable destination
- Is an international destination





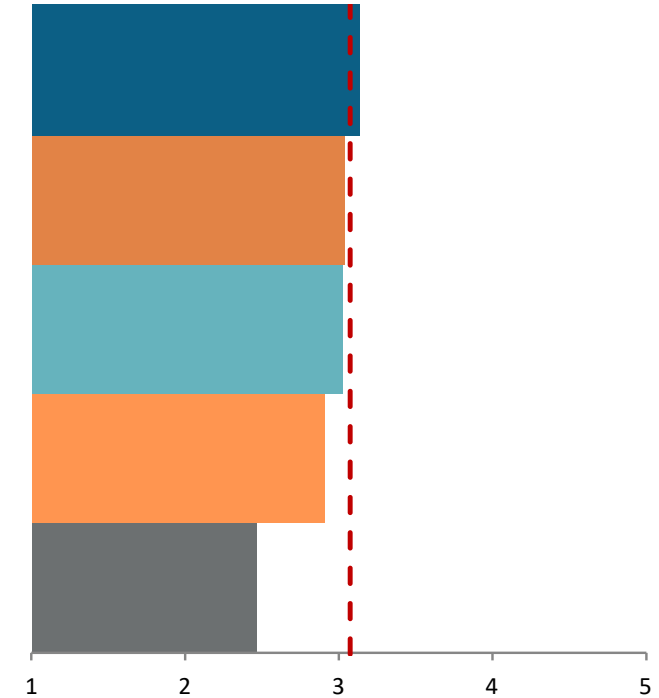
# Destination Performance

- Adequately measures and tracks the performance of our tourism industry
- DMO does a good job at communicating the performance and economic impact of tourism
- Hotels are performing well
- Seeing a positive growth in overnight visitation
- DMO is successfully converting leads for meetings and conventions



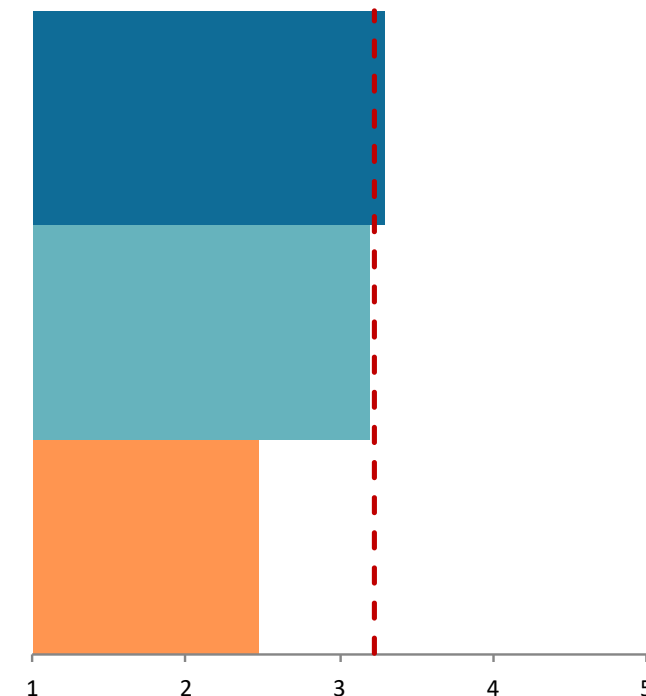
# Convention & Meeting Facilities

- Has good, unique off-site venues for special events
- Has the necessary meeting facilities to compete today
- Offers an abundance of professional and experienced conference services suppliers
- Hotels and other meeting space is well branded
- Has the necessary meeting facilities to compete for the next 10 years



# Communication & Internet Infrastructure

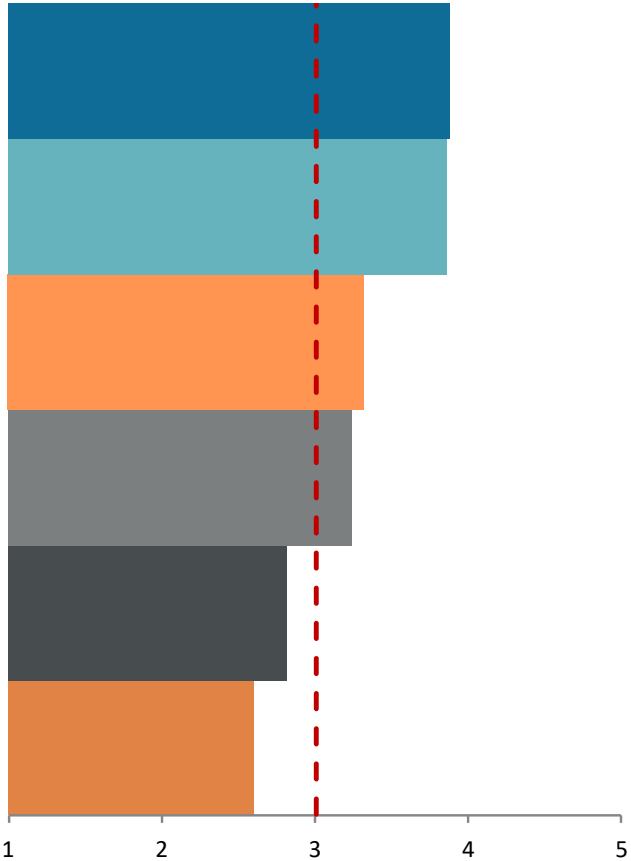
- Substantial Wi-Fi access in meeting/convention facilities
- Good mobile coverage/availability at all attractions and entertainment areas
- Offers sufficient free Wi-Fi in outdoor/public areas





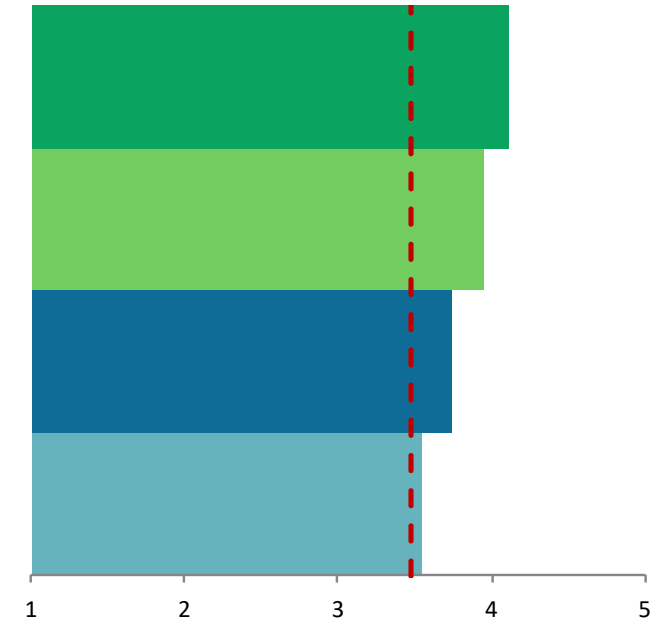
# Mobility & Access

- Roads can easily handle residents, businesses and visitor traffic
- Has great directional signage and highways that make it easy to get around
- Is a bicycle-friendly city with easy, well-marked bike routes throughout
- Provides good access and mobility for those with disabilities
- Known as a walkable area
- Has adequate public transportation that makes it easy for visitors to get around



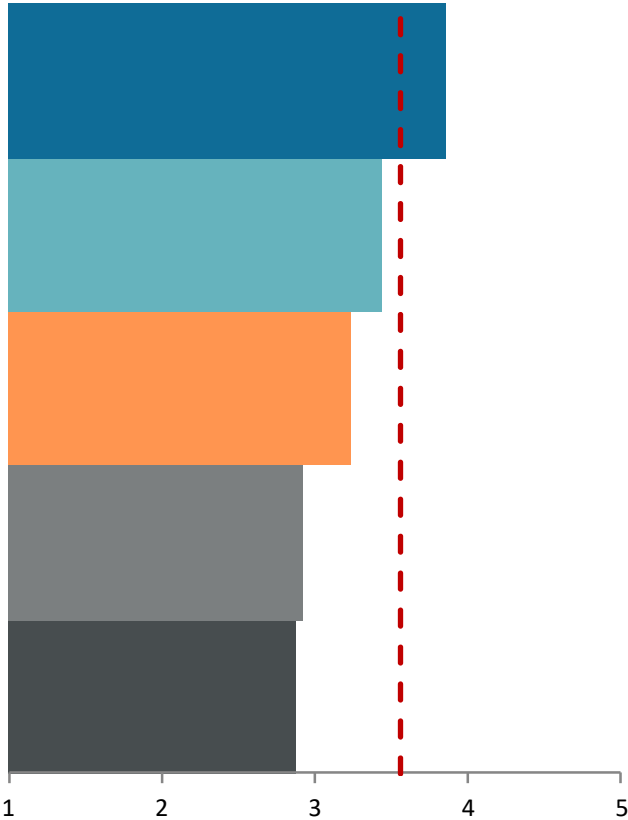
# Accommodation

- Offers a diversity of accommodation price options with the presence of well-known hotels
- Has adequate accommodations capacity
- Location and proximity of accommodation options meets visitor needs
- Adequate supply of short-term rentals to supplement current hotel capacity



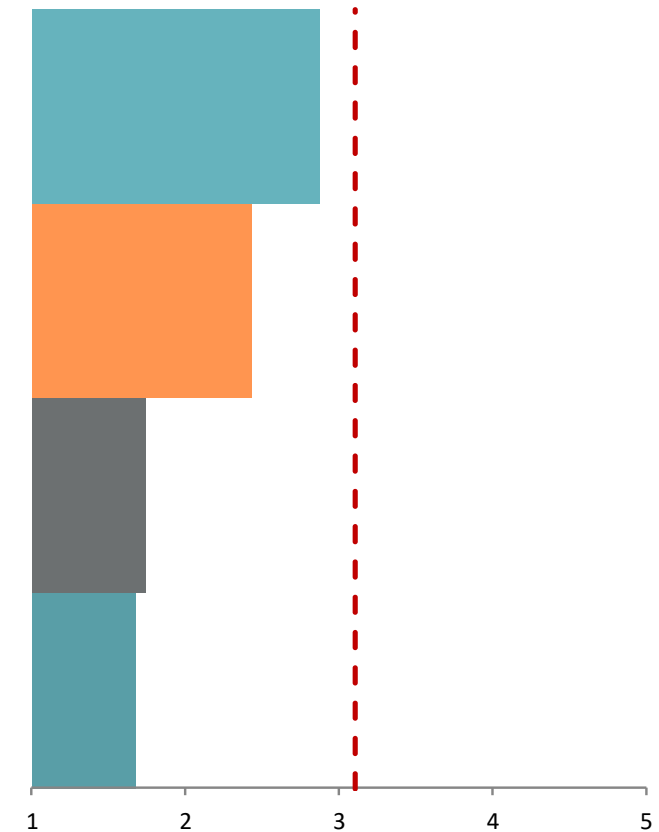
# Events

- Has an abundance of parks and outdoor spaces for handling special events
- Citizens are supportive of hosting major sporting/national or international events
- Government is cooperative and supportive in attracting and hosting major events
- Has diverse and quality facilities and venues with capacity and availability to host major events
- Offers a year-long series of major events that attract visitors and drive economic impact



# Air Access

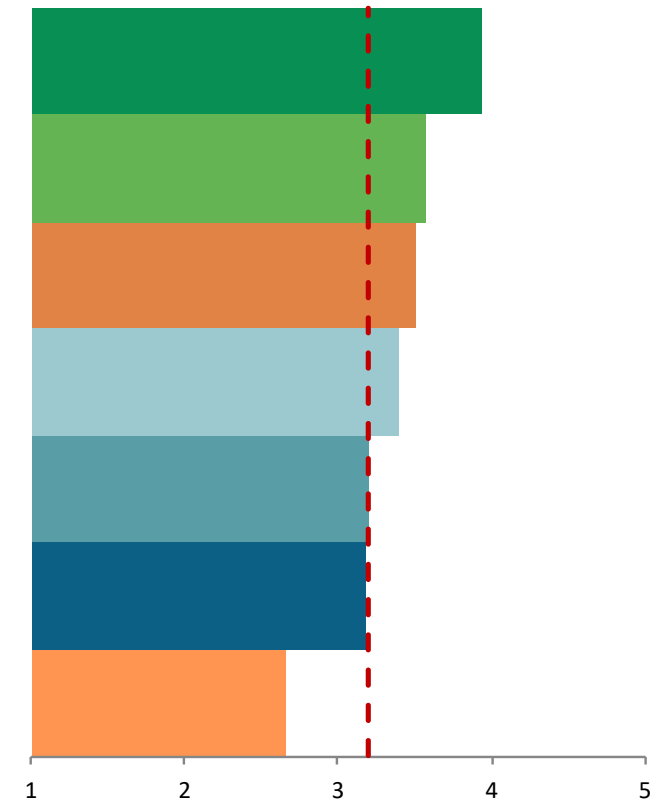
- The airport offers a true destination sense of place and supports the brand
- The airport is a state of the art facility with capacity to grow
- Offers variety and quality domestic air access (e.g. number of flights, schedule, and capacity)
- Offers a wide variety of domestic air access (e.g. number of carriers and low-cost options)









# Sports & Recreation Facilities

- Has adequate number of tours available for outdoor enthusiasts
- Has adequate number of campgrounds and camping facilities in the area
- Has the sports fields and availability to host major amateur events
- Has the venues to host major professional sporting events
- Local sports leadership are engaged and helpful in pursuing sporting events
- Provides visitors with a wide variety of outdoor experiences
- Has adequate suppliers that coincide with outdoor recreational offerings

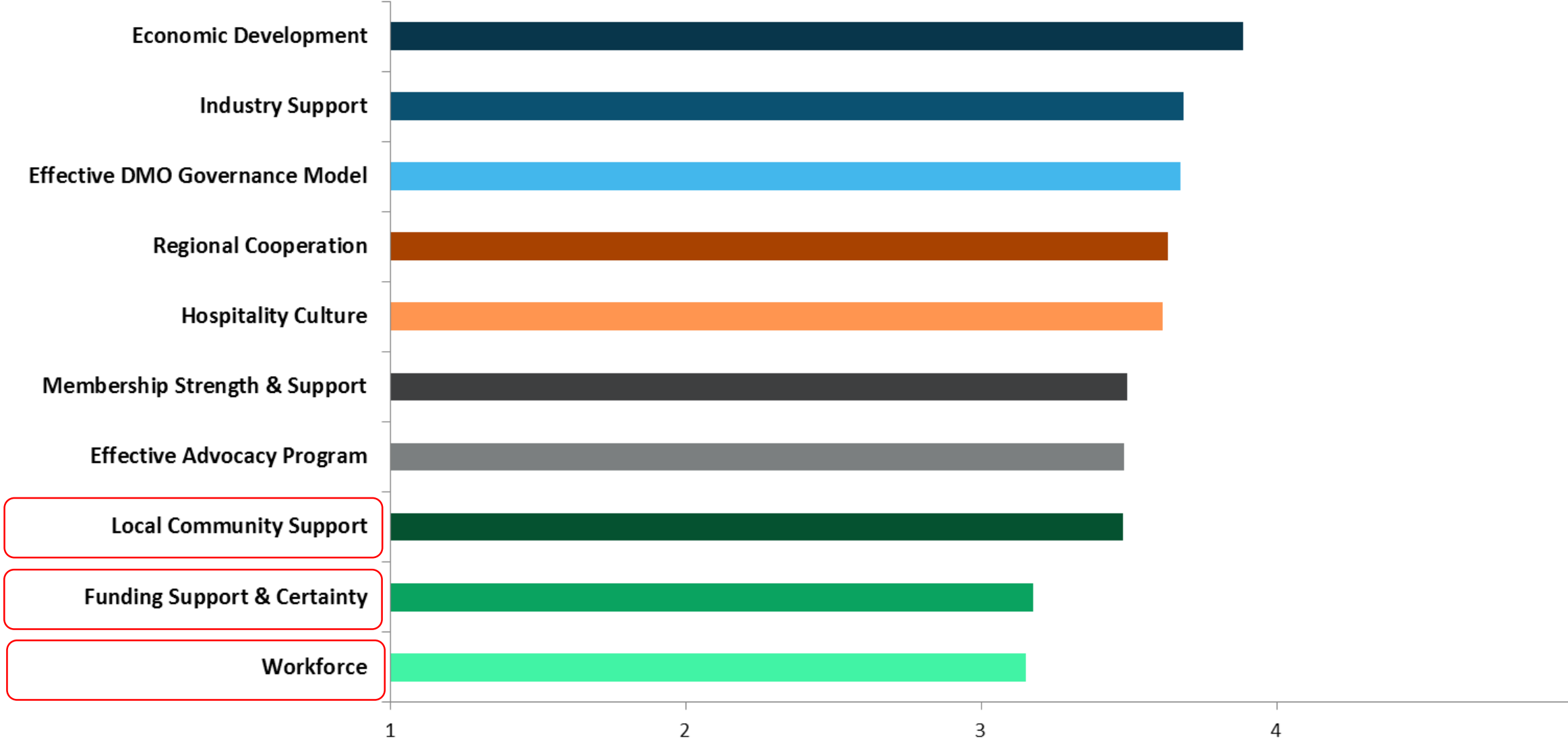


# Community Support & Engagement – Global Averages







		Relative Importance
	Hospitality Culture	1 <sup>st</sup>
	Economic Development	2 <sup>nd</sup>
	Local Community Engagement	3 <sup>rd</sup>
	Workforce	4 <sup>th</sup>

# Community Support & Engagement Performance



# Community Support & Engagement – Cheyenne, WY



	Relative Importance	Perceived Performance
 Funding Support & Certainty	1 <sup>st</sup>	8 <sup>th</sup>
 Effective Advocacy Program	2 <sup>nd</sup>	6 <sup>th</sup>
 Economic Development	3 <sup>rd</sup>	3 <sup>rd</sup>
 Effective DMO Governance Model	4 <sup>th</sup>	4 <sup>th</sup>



# Community Support & Engagement – Report Card

Variable	Relative Importance (0-100%)			Perceived Performance (1-5 scale)		
	Industry Average	Cheyenne Average	Standard Deviation	Industry Average	Cheyenne Average	Standard Deviation
Funding Support & Certainty	10.1%	10.5%	0%	3.17	3.37	0.67
Effective Advocacy Program	10.1%	10.2%	0%	3.48	3.92	0.52
Economic Development	10.3%	10.2%	0%	3.89	4.07	0.54
Effective DMO Governance Model	9.5%	10.1%	0%	3.67	4.01	0.65
Membership Strength & Support	9.1%	10.1%	0%	3.50	4.20	0.48
Hospitality Culture	10.3%	10.1%	0%	3.61	3.27	0.90
Workforce	10.2%	10.0%	0%	3.15	2.80	0.90
Local Community Support	10.3%	10.0%	0%	3.48	3.65	0.57
Industry Support	10.0%	9.6%	0%	3.69	4.19	0.51
Regional Cooperation	10.1%	9.2%	1%	3.63	3.97	0.61
COMMUNITY SUPPORT & ENGAGEMENT - Cheyenne						3.74
INDUSTRY AVERAGE COMMUNITY SUPPORT & ENGAGEMENT						3.56

## RESULTING SCENARIO

VOYAGERS

**Note**  
**Green shading signifies that the destination outperformed the industry average by greater than 0.2.**  
**Yellow shading signifies that the destination underperformed the industry average by greater than 0.2 but less than 0.4.**  
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# Community Support & Engagement – Stakeholder Report Card

Variable	Perceived Performance (1-5 scale)						
	Cheyenne Average	Visit Cheyenne Staff	Visit Cheyenne Board of Directors	Tourism Stakeholders	Customers	Government Leaders	Community Leaders
Funding Support & Certainty	3.37	3.54	3.71	3.23	3.40	3.35	3.36
Effective Advocacy Program	3.92	4.12	4.19	3.76	3.87	3.90	3.94
Economic Development	4.07	4.16	4.11	3.98	4.18	4.21	4.02
Effective DMO Governance Model	4.01	4.30	4.57	3.73	3.88	4.15	3.97
Membership Strength & Support	4.20	4.09	4.23	4.14	4.35	4.37	4.18
Hospitality Culture	3.27	3.38	3.79	3.31	3.58	3.42	3.03
Workforce	2.80	3.03	2.71	2.59	2.90	2.94	2.82
Local Community Support	3.65	3.80	4.05	3.36	3.77	3.87	3.63
Industry Support	4.19	4.22	4.53	4.02	4.36	4.42	4.11
Regional Cooperation	3.97	4.05	4.07	3.96	4.11	4.09	3.87
COMMUNITY SUPPORT & ENGAGEMENT - Cheyenne							3.74
INDUSTRY AVERAGE COMMUNITY SUPPORT & ENGAGEMENT							3.56

RESULTING SCENARIO

VOYAGERS

**Note**

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# Community Support & Engagement – Comparison to 2015 Assessment

DESTINATION  
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2015 Assessment

2018 Assessment



Funding Support & Certainty

3.69

3.37



Effective Advocacy Program

3.65

3.92



Economic Development

4.02

4.07



Effective DMO Governance Model

3.89

4.01



Membership Strength & Support

3.95

4.20



Hospitality Culture

3.13

3.27



Workforce

2.54

2.80



Local Community Support

3.54

3.65



Industry Support

4.10

4.19



Regional Cooperation

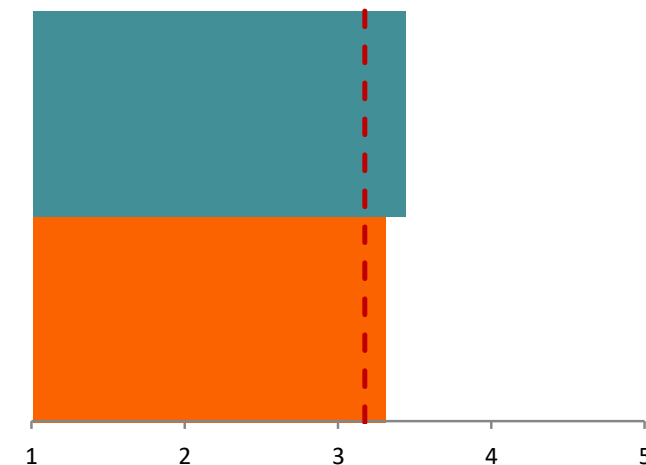
3.79

3.97



# Funding Support & Certainty

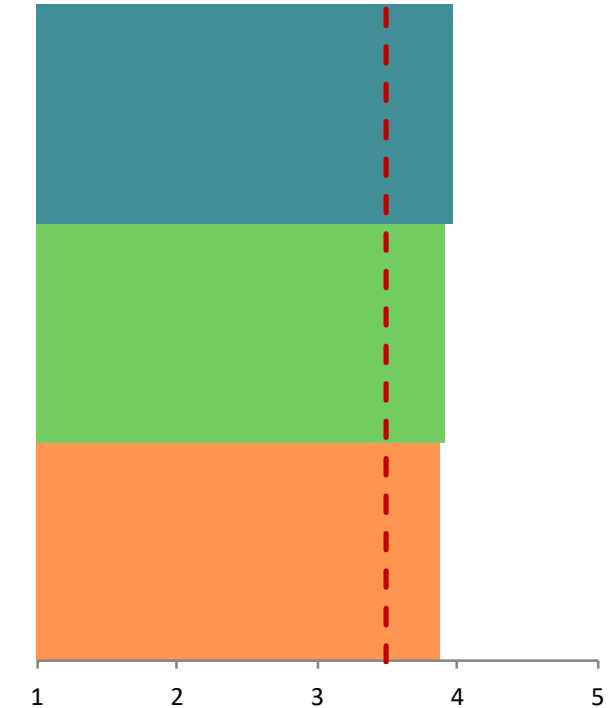
- Revenue sources are stable and sustainable for the future
- There is sufficient revenue sources to fund their strategies and initiatives today





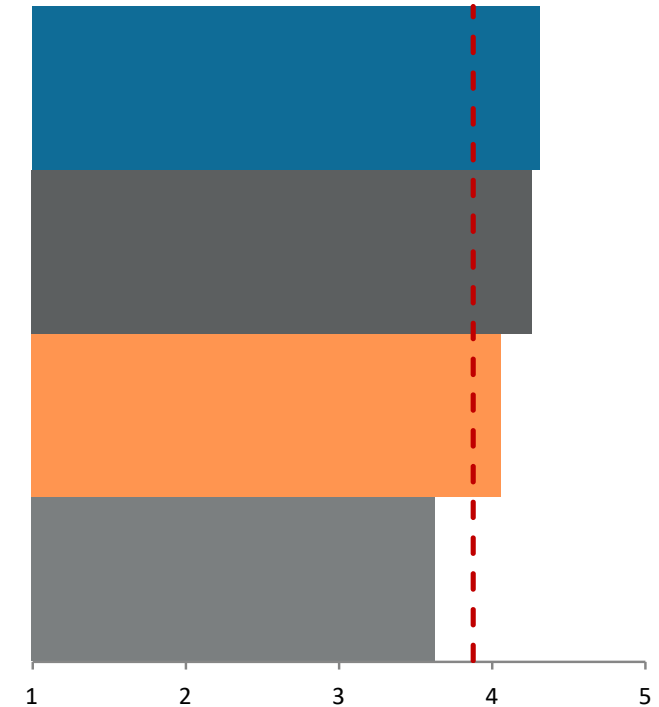
# Effective Advocacy Program

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



# Economic Development

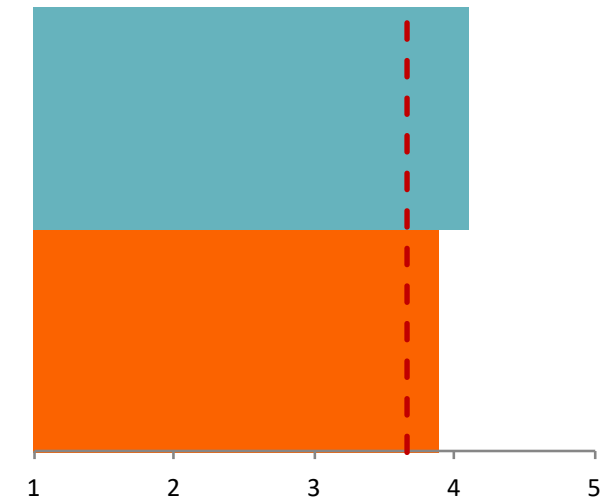
- DMO and the tourism industry play an important role in our community's economic strategies
- DMO has a good working relationship with local chambers and economic development agencies
- Tourism and the meetings industry are identified as key economic drivers
- There is a tourism master plan that includes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



# Effective Destination Organization Governance Model

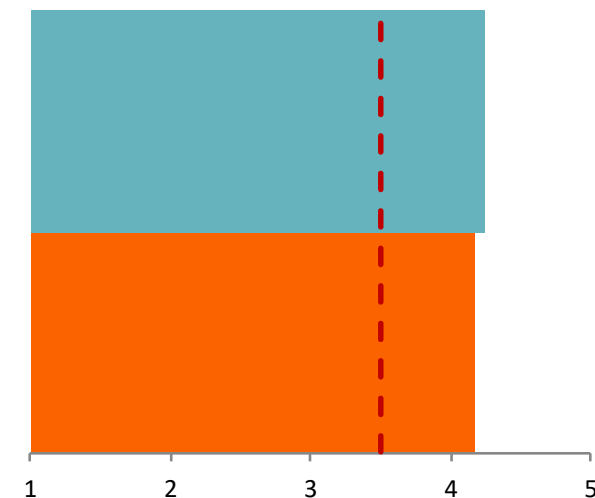
■ DMO has an effective governance structure, with appropriate and effective oversight

■ Local leaders are engaged in DMO's governance structure



# Membership Strength & Support

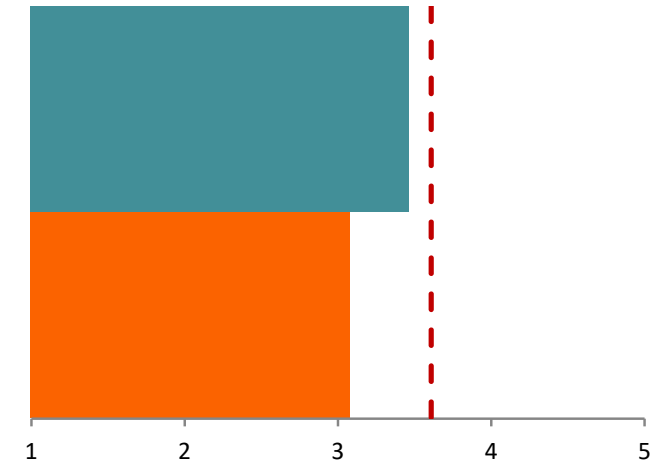
- Businesses that benefit from tourism/conventions find value in being a partner
- Partners are active, engaged and supportive





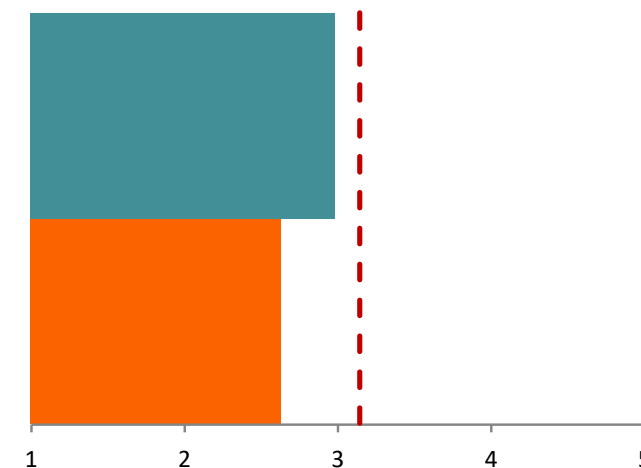
# Hospitality Culture

- Destination has a hospitality-minded culture that welcomes visitors
- Destination has a reputation for offering high-quality customer service



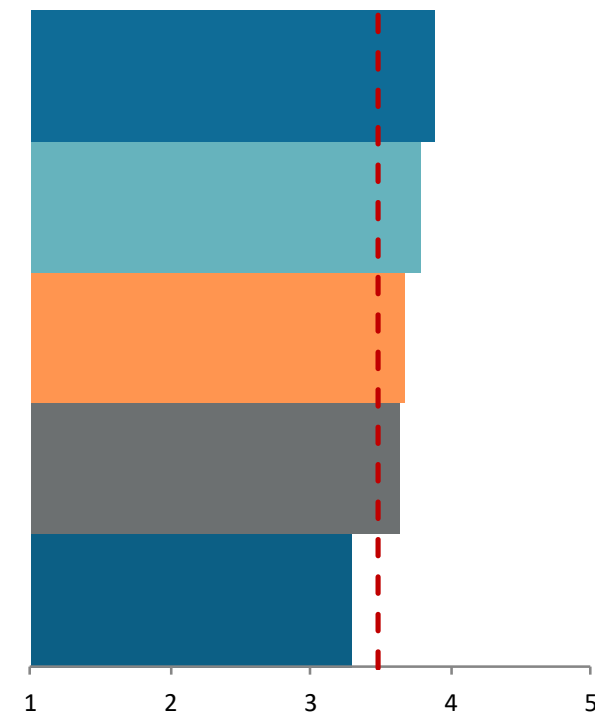
# Workforce

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



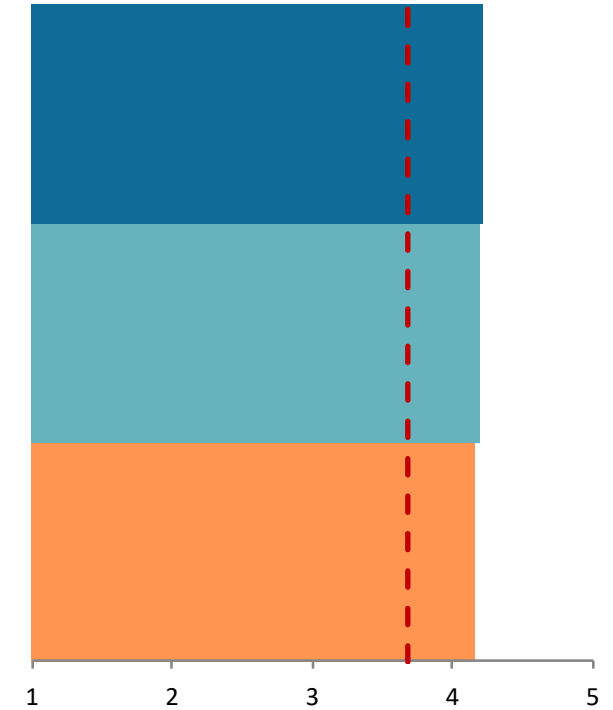
# Local Community Support

- DMO has great corporate support
- Tourism industry gets positive media coverage locally
- Media have a positive perception of the tourism and meetings industry
- Businesses have a positive perception of the tourism and meetings industry
- Residents have a positive perception of tourism and meetings industry



# Industry Support

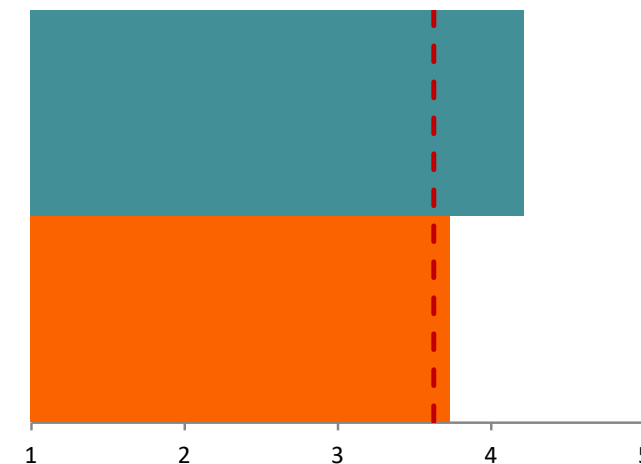
- DMO is seen as a leader in the state
- Tourism industry leaders and stakeholders are supportive of the direction
- DMO is seen as a leader in the regional tourism industry





# Regional Cooperation

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



# Key Takeaways

- Currently in Voyagers quadrant with above below average destination strength and above average community support & engagement
- Stakeholders are somewhat aligned on perceptions about destination and community support



## Destination Opportunities

- High-quality shopping
- Unique dining options
- Large, famous attractions
- Unique neighborhoods
- Known as being environmentally conscious
- Known for being innovative
- Known for having attractions
- Convention & meeting facilities
- Public Wi-Fi
- Public Transportation
- Known for being walkable
- Year-long series of major events
- Diverse event facilities
- Air access
- Adequate suppliers for outdoor recreational offerings



## Community Support & Engagement Opportunities

- Funding Support & Certainty
- Offering high-quality customer service
- Workforce attraction
- Residents perception of tourism

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

## Attractions & Entertainment (32%)

- Have a tourist attractive walking and shopping and dining district with ambassadors in the summer and easily available translations
- Make downtown a walkable destination with multiple attractions
- Build upon the history of Cheyenne and the historic buildings
- Develop and implement year-round diverse and interesting activities that take advantage of those things that make Cheyenne, and the immediate area, unique. Other things: fill vacancies downtown, access to Cheyenne (A rail system that links to Colorado; A airport that has more than one flight per day)
- Better Restaurants

## Economic Development (13%)

- Lots of improvement needed downtown
- Clean up. When I travel to other small locales who value their tourism trade, the local businesses and common area are well kept, clean which is more welcoming and friendly. While challenged by the wind, I think we could take more pride in our community by presenting a cleaner more polished image
- Continue to improve the vitality of downtown
- Downtown- first floor spaces of variety and interest for walking, keeping people in downtown. Putting offices, courthouses in those potential spaces is not advancing Cheyenne's visitor experiences

## Brand/Marketing (10%)

- Turn downtown into the "live the legend" brand. Old west. We need to provide the western theme year round not just CFD
- Grow beyond the traditional cowboy, western image and incorporate modern-day attractions
- Expand its branding and promotion beyond simply Frontier Days and the Capitol
- Be known for more than a Western town
- An emphasis on technology will continue to develop the "stigma" that Cheyenne has carried in the past. While our cowboy brand is an important part of our history, it is important that we still are seen as relevant and up to par if we want to continue to bring in younger and tech-driven businesses and tourists

# Are there certain issues that Visit Cheyenne should specifically address?

## **Air Access (25%)**

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- Air service
- Improving the downtown experience and air service
- Travel into the city by air.
- More flights out of the airport
- Air service and more city public transportation

## **Attractions & Entertainment (20%)**

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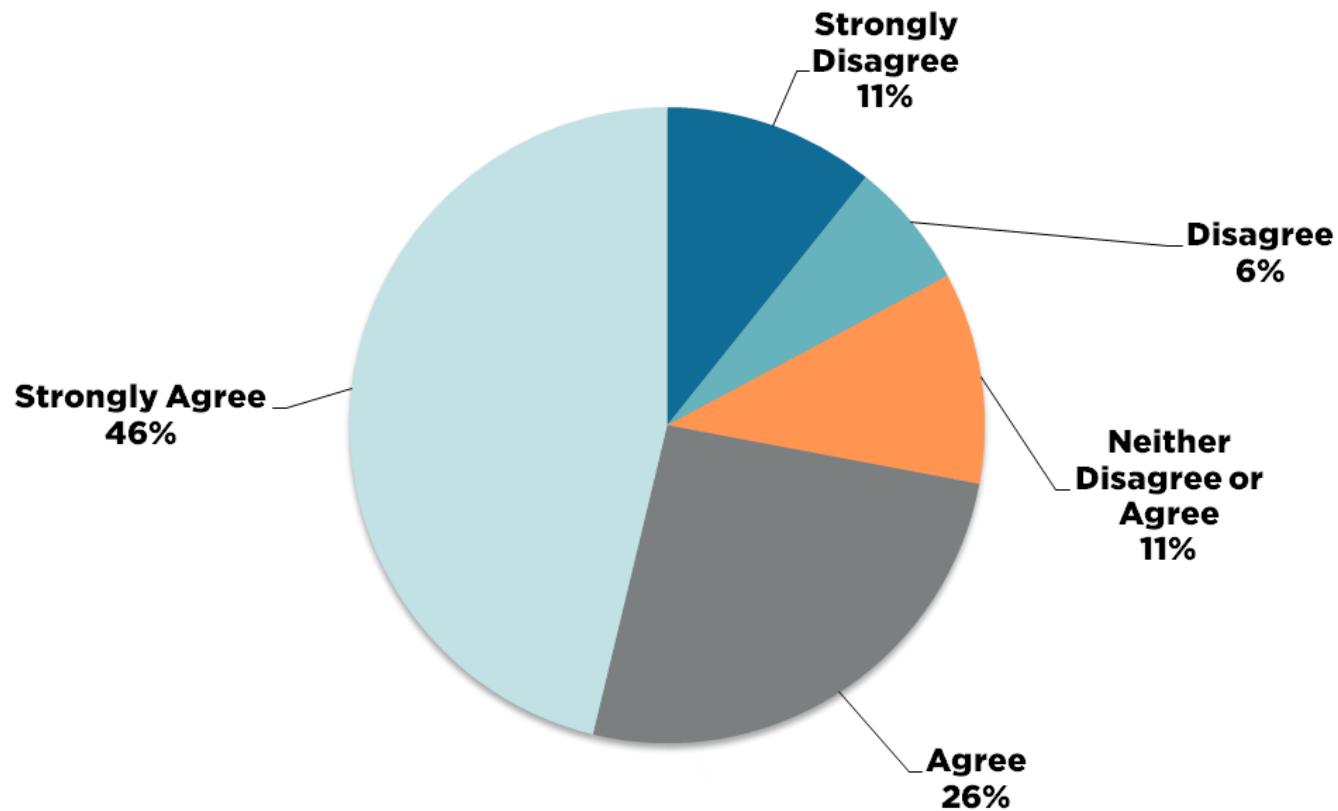
## **Economic Development (20%)**

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- Do as much as possible to help with downtown development
- Work to remove the number of transients, sex offenders, substance abuse and transition housing and offices outside of downtown Cheyenne. Example, potential siting of Children's museum across the alley from recovery housing -- neither safe for nor good optics. Work with law enforcement and city officials to clear drug activities from downtown area. Shift the paradigm away from drinking alcohol related business/activities. Fewer bars, more pedestrian, people gathering areas. Consider a valet style parking service to encourage participation downtown during popular events



**The City of Cheyenne should use reasonable public funds and existing statutory authority to remediate and market the Hitching Post site for future development.**



**Average: 3.90 (out of 5)**

# Questions & Comments

# Breakout Groups

# Questions

1. 3 most important issues facing the destination?
2. Single most important action Visit Cheyenne should take?





1	2	3
Year round destination	Year round destination (events)	Year round destination (attractions)
Branding		
Visit Cheyenne AI concierge		
	Downtown revitalization	
	Workforce	Workforce
		Placemaking/collaboration

# Visit Cheyenne Action

1	2	3
		Workforce development (customer service training)
Partnership/collaboration	Partnerships/collaboration	

# Thank You!

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