

DESTINATION

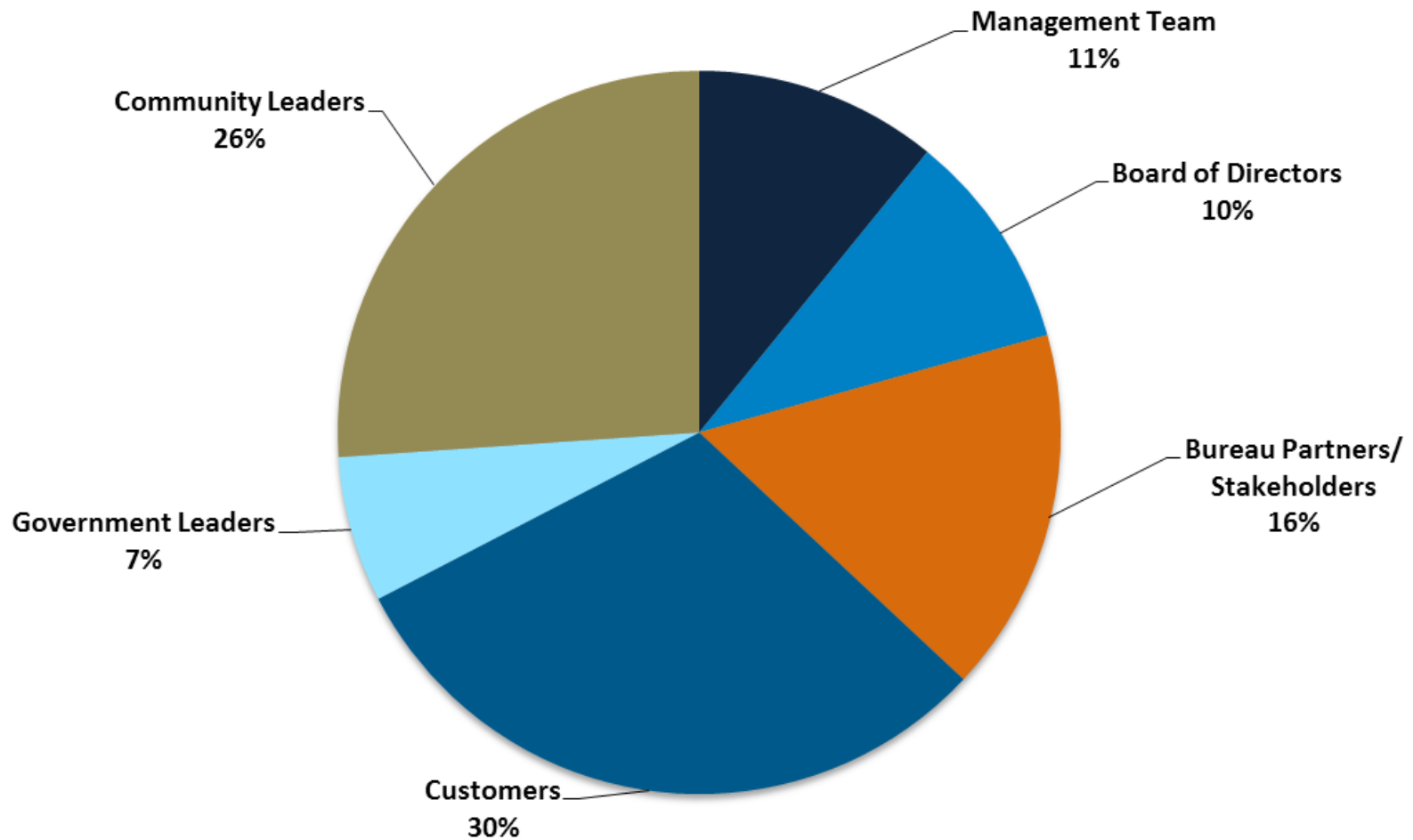


Multi-User Online Diagnostic Tool Results: **Des Moines, IA**

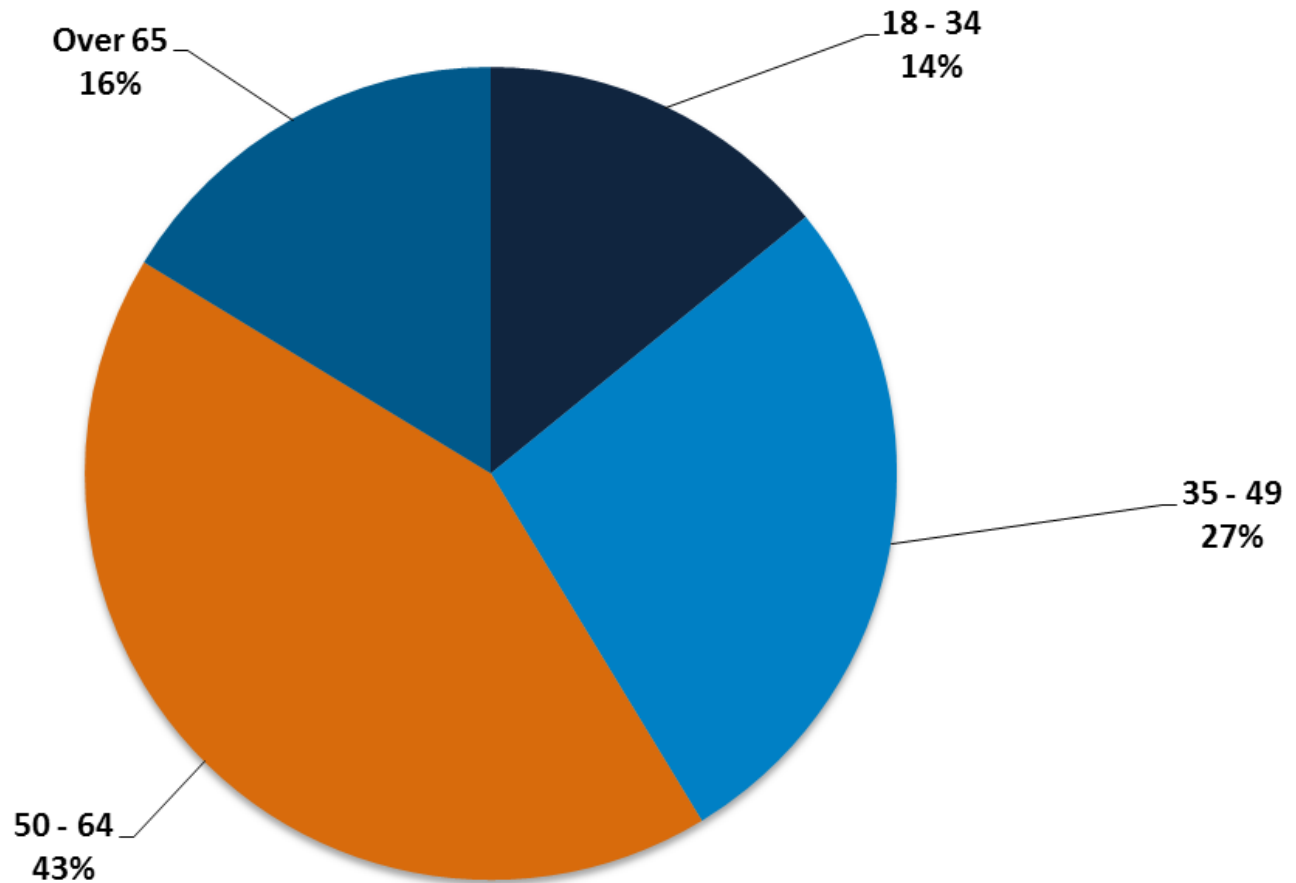
Greater Des Moines Convention & Visitors Bureau

November 16, 2016

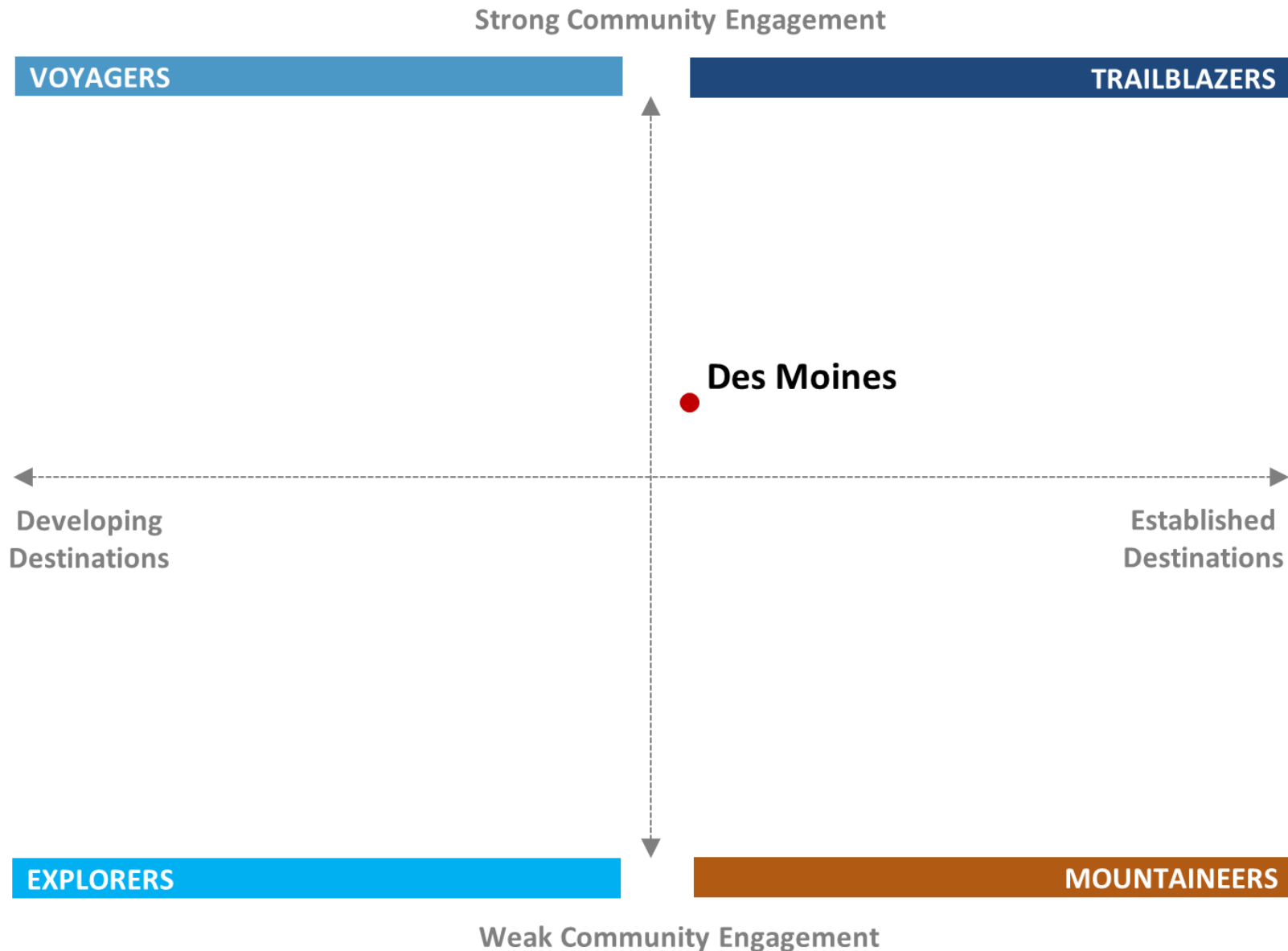
92 Responses



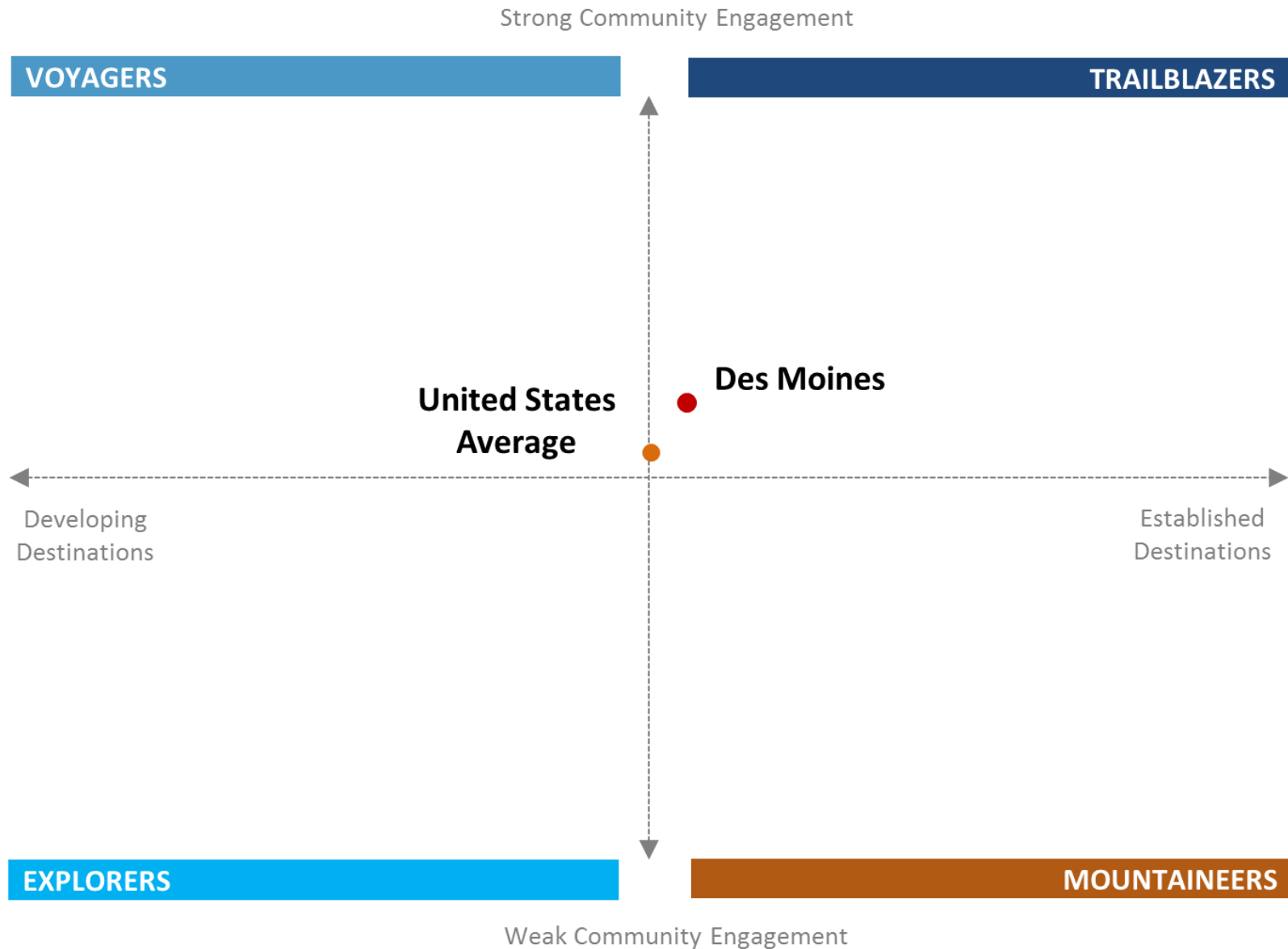
Age Demographic



Des Moines Overall Assessment - Industry



Des Moines Overall Assessment – United States



Trailblazers

These DMO's and destinations realize the benefits of their tourism vision and work to keep the community and marketplace engagement fresh and relevant.

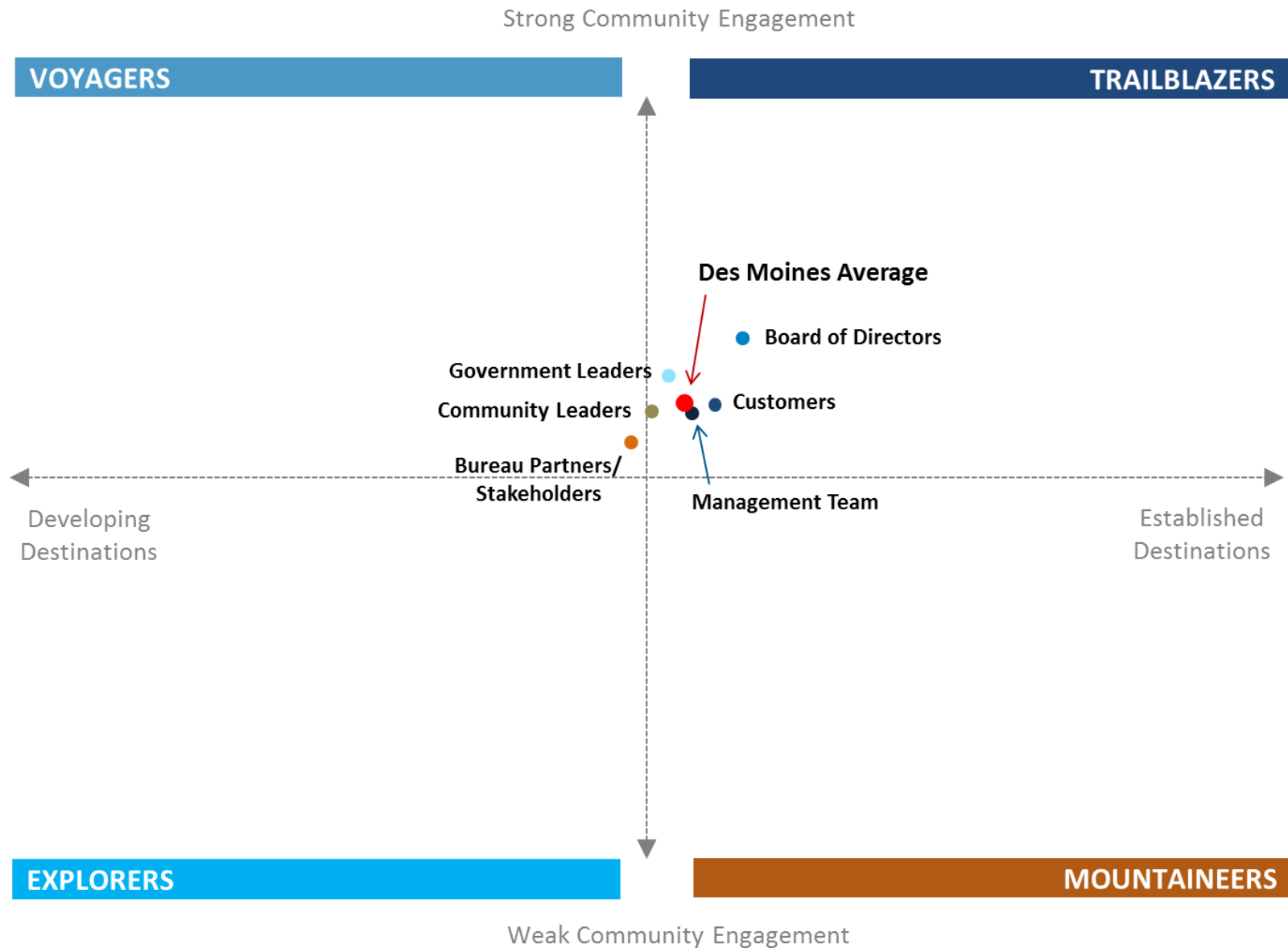
Key Strategic Challenges

- Avoiding complacency
- Continuing to evolve the destination that delivers a compelling and authentic marketplace experience
- Keeping your eye on the ball

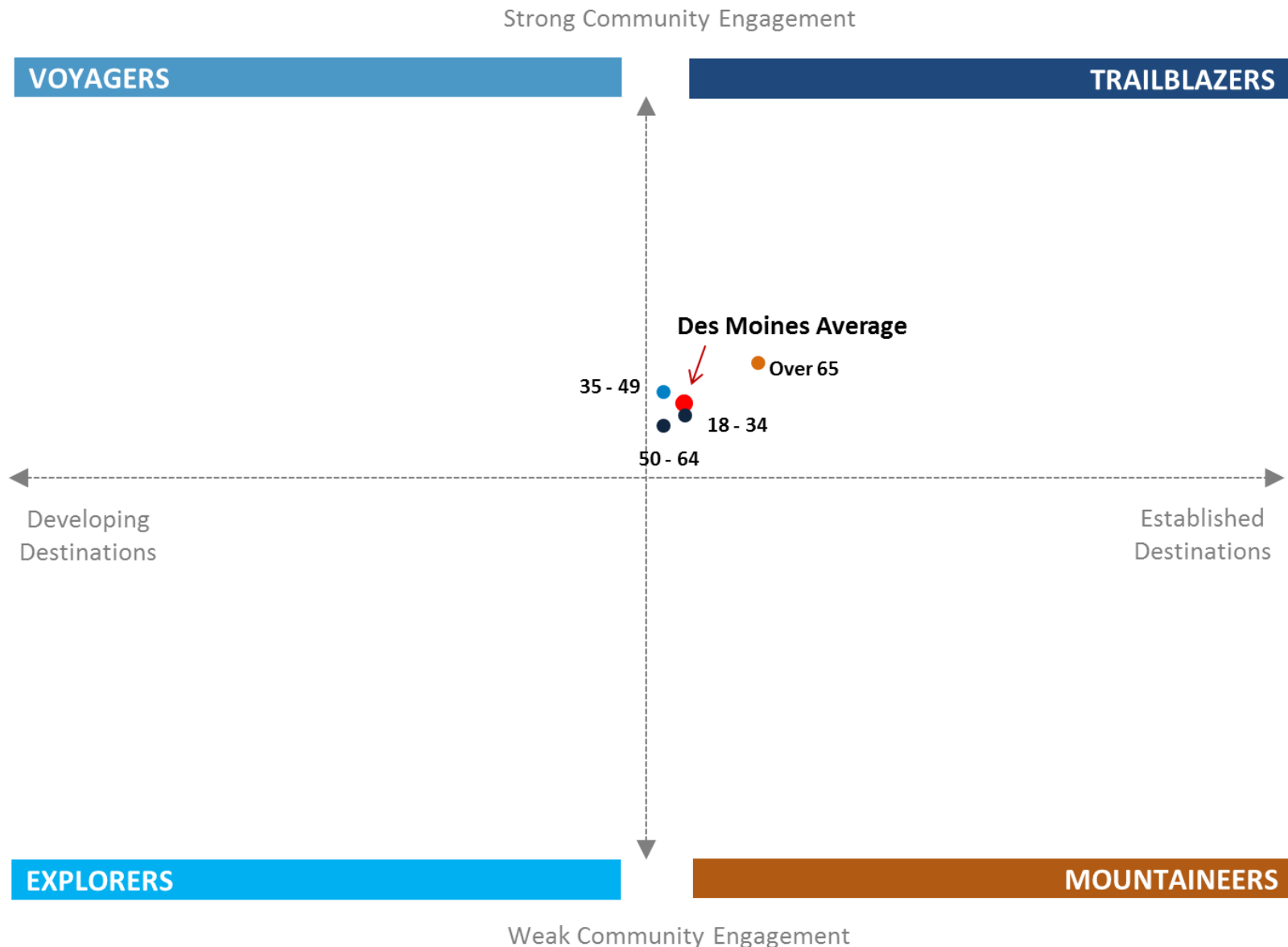
Strong Community Engagement



Des Moines Overall Assessment - Stakeholder







Des Moines Overall Assessment – Age Group







Destination Strength Rankings - Industry



	Relative Importance	Perceived Performance
 Brand	1 st	7 th
 Destination Performance	2 nd	1 st
 Attractions and Entertainment	3 rd	3 rd
 Accommodation	4 th	4 th

Destination Strength Rankings – Des Moines



	Relative Importance	Perceived Performance
 <p>Accommodation</p>	1 st	4 th
 <p>Attractions & Entertainment</p>	2 nd	3 rd
 <p>Convention & Meeting Facilities</p>	3 rd	9 th
 <p>Sports & Recreation Facilities</p>	4 th	6 th

Destination Strength: Relative Importance

Variable	Relative Importance (0-100%)		
	Industry Average	Des Moines Average	Standard Deviation
Accommodation	12%	10.4%	1%
Attractions & Entertainment	12%	10.3%	1%
Convention & Meeting Facilities	10%	10.3%	1%
Sports & Recreation Facilities	9%	10.1%	2%
Communication & Internet Infrastructure	7%	10.0%	1%
Air Access	9%	10.0%	1%
Mobility & Access	7%	10.0%	1%
Events	9%	9.7%	1%
Brand	13%	9.6%	2%
Destination Performance	12%	9.6%	2%

Destination Strength: Report Card

Variable	Relative Importance (0-100%)			Perceived Performance (1-5 scale)		
	Industry Average	Des Moines Average	Standard Deviation	Industry Average	Des Moines Average	Standard Deviation
Accommodation	12%	10.4%	1%	3.42	3.73	0.69
Attractions & Entertainment	12%	10.3%	1%	3.68	3.81	0.56
Convention & Meeting Facilities	10%	10.3%	1%	3.12	3.28	0.66
Sports & Recreation Facilities	9%	10.1%	2%	3.32	3.66	0.57
Communication & Internet Infrastructure	7%	10.0%	1%	3.32	3.47	0.72
Air Access	9%	10.0%	1%	2.90	2.75	0.75
Mobility & Access	7%	10.0%	1%	3.04	3.66	0.66
Events	9%	9.7%	1%	3.73	3.99	0.52
Brand	13%	9.6%	2%	3.21	3.69	0.63
Destination Performance	12%	9.6%	2%	3.83	4.06	0.69

DESTINATION STRENGTH - Des Moines	3.61
INDUSTRY AVERAGE DESTINATION STRENGTH	3.49

RESULTING SCENARIO	TRAILBLAZERS
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Destination Strength: Report Card – Stakeholder Group

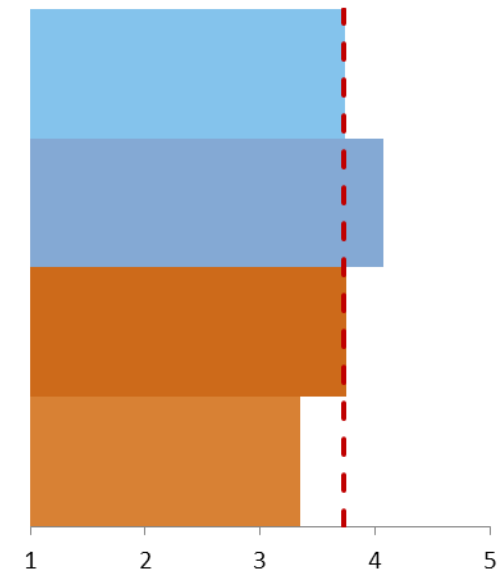
Variable	Perceived Performance (1-5 scale)						
	Des Moines Average	Management Team	Board of Directors	Bureau Partners/ Stakeholders	Customers	Government Leaders	Community Leaders
Accommodation	3.73	3.83	4.18	3.66	3.85	3.46	3.48
Attractions & Entertainment	3.81	3.76	4.02	3.69	3.85	3.77	3.79
Convention & Meeting Facilities	3.28	3.24	3.40	3.23	3.44	2.98	3.19
Sports & Recreation Facilities	3.66	3.60	3.82	3.34	3.63	3.46	3.86
Communication & Internet Infrastructure	3.47	3.83	3.68	3.41	3.56	3.56	3.10
Air Access	2.75	2.94	2.67	2.73	2.96	2.49	2.54
Mobility & Access	3.66	3.73	3.76	3.40	3.86	3.94	3.36
Events	3.99	3.87	4.21	3.79	4.03	3.86	4.05
Brand	3.69	3.55	3.86	3.40	3.82	3.32	3.80
Destination Performance	4.06	4.04	4.20	3.80	4.07	4.10	4.12

DESTINATION STRENGTH	3.61
INDUSTRY AVERAGE DESTINATION STRENGTH	3.49

RESULTING SCENARIO	TRAILBLAZERS
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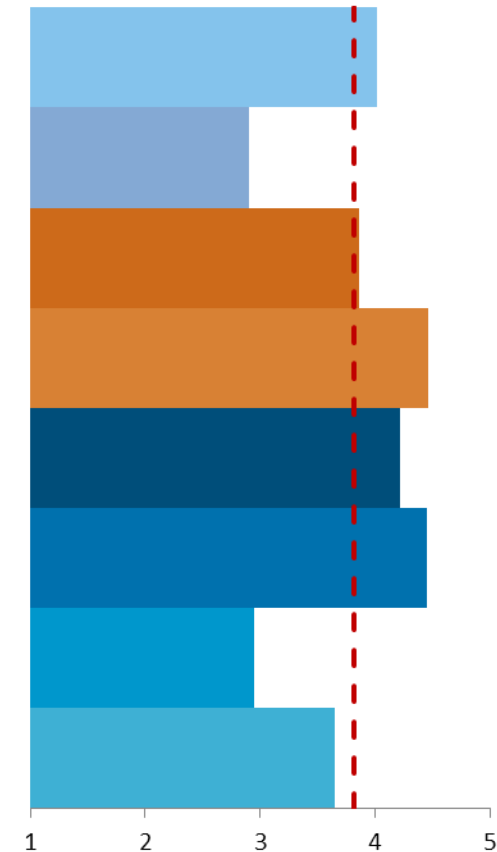
Accommodation

- Adequate accommodations capacity
- Diversity of accommodation price options
- Location of accommodation options meets visitor needs
- Sufficient number of large, headquarter hotels to meet demand



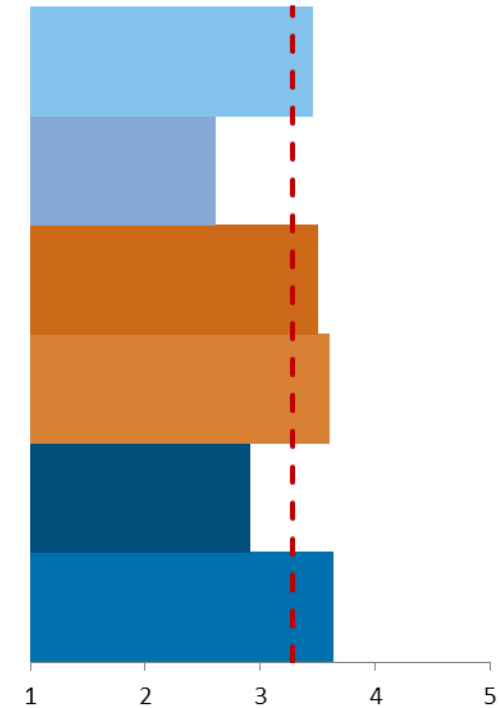
Attractions & Entertainment

- Authentic and unique attractions and entertainment opportunities
- Downtown offers diverse and high-quality shopping opportunities
- Metro area offers diverse/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
- Unique and vibrant neighborhoods



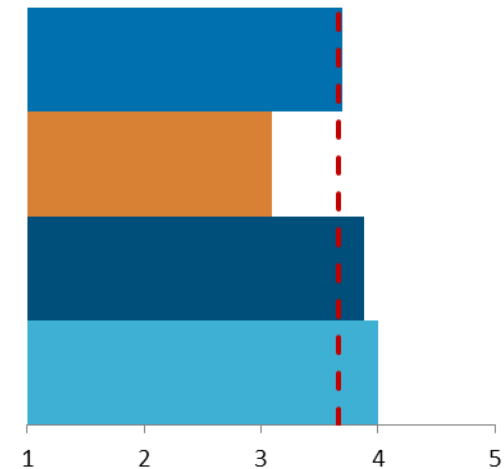
Convention & Meeting Facilities

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



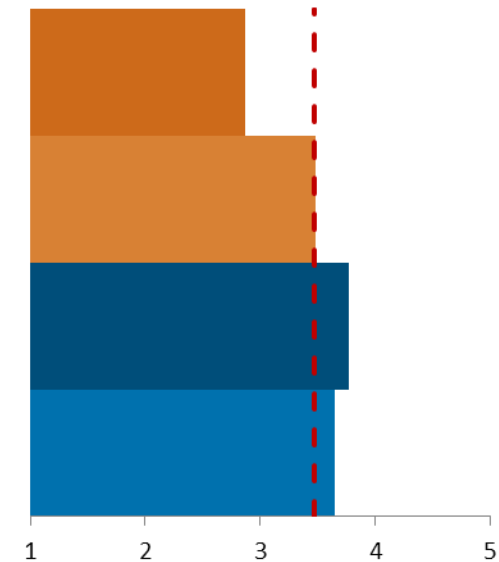
Sports & Recreation Facilities

- Sports fields to host major amateur and collegiate sporting events
- Venues to host major professional sporting events
- Metro needs to increase indoor and outdoor facilities
- Sports leadership are engaged/helpful in pursuing sports events



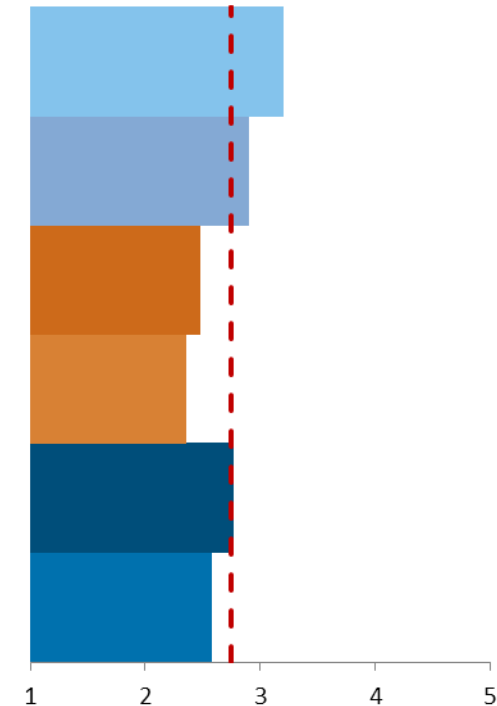
Communication & Internet Infrastructure

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



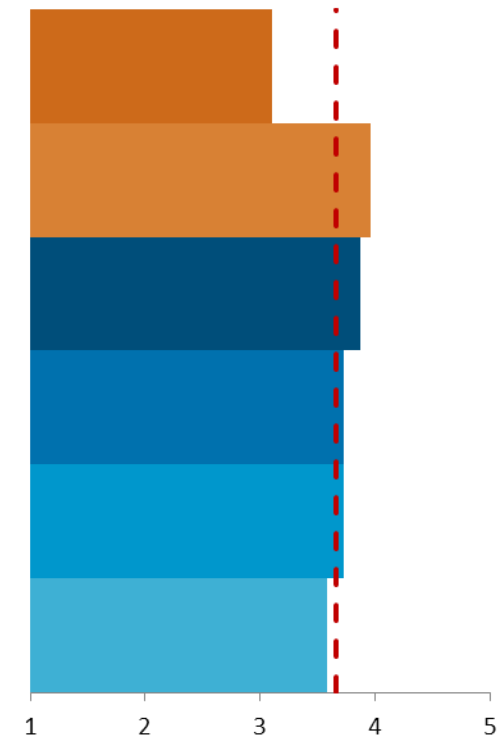
Air Access

- Domestic air access in terms of number of flights and capacity
- Domestic air access in terms of range of carriers and low-cost options
- International air access in terms of number of flights and capacity
- International 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 offers a true destination "sense of place"



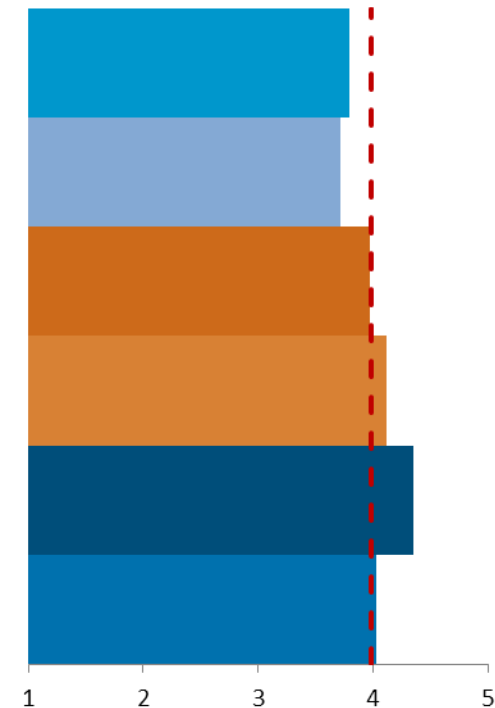
Mobility & Access

- 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 area



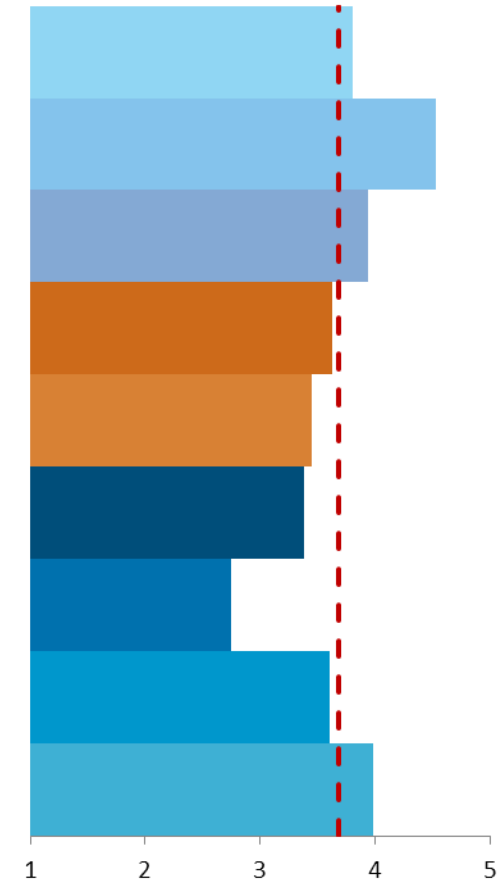
Events

- 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
- Local government is cooperative and supportive
- Citizens are supportive of hosting major national or international events
- Convention center produces events for residents to enjoy



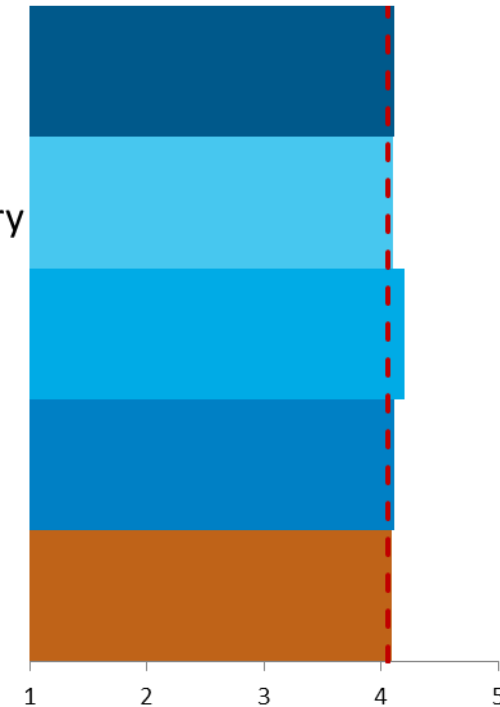
Brand

- 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 image is the skyline with capitol



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, RevPAR)



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 Des Moines



	Relative Importance	Perceived Performance
 Industry Support	1 st	3 rd
 Hospitality Culture	2 nd	2 nd
 Economic Development	3 rd	1 st
 Effective Advocacy Program	4 th	8 th

Community Support & Engagement: Relative Importance

Variable	Relative Importance (0-100%)		
	Industry Average	Des Moines Average	Standard Deviation
Industry Support	12%	10.2%	1%
Hospitality Culture	10%	10.2%	1%
Economic Development	9%	10.2%	1%
Effective Advocacy Program	9%	10.1%	1%
Funding Support & Certainty	13%	10.1%	1%
Regional Cooperation	9%	10.1%	1%
Workforce	9%	10.1%	1%
Membership Strength & Support	7%	9.8%	2%
Local Community Support	11%	9.8%	1%
Effective DMO Governance Model	11%	9.4%	2%

Community Support & Engagement: Report Card

Variable	Relative Importance (0-100%)			Perceived Performance (1-5 scale)		
	Industry Average	Des Moines Average	Standard Deviation	Industry Average	Des Moines Average	Standard Deviation
Industry Support	12%	10.2%	1%	3.70	4.14	0.71
Hospitality Culture	10%	10.2%	1%	3.55	4.16	0.65
Economic Development	9%	10.2%	1%	3.91	4.19	0.62
Effective Advocacy Program	9%	10.1%	1%	3.39	3.83	0.71
Funding Support & Certainty	13%	10.1%	1%	3.06	3.69	0.77
Regional Cooperation	9%	10.1%	1%	3.58	4.03	0.66
Workforce	9%	10.1%	1%	3.16	3.69	0.77
Membership Strength & Support	7%	9.8%	2%	3.42	4.08	0.70
Local Community Support	11%	9.8%	1%	3.60	4.02	0.65
Effective DMO Governance Model	11%	9.4%	2%	3.74	3.99	0.80
COMMUNITY SUPPORT & ENGAGEMENT - Des Moines						3.99
INDUSTRY AVERAGE COMMUNITY SUPPORT & ENGAGEMENT						3.60

RESULTING SCENARIO **TRAILBLAZERS**

Community Support & Engagement: Report Card – Stakeholder Group

Variable	Perceived Performance (1-5 scale)						
	Des Moines Average	Management Team	Board of Directors	Bureau Partners/ Stakeholders	Customers	Government Leaders	Community Leaders
Industry Support	4.14	4.20	4.50	4.38	3.98	4.08	4.08
Hospitality Culture	4.16	3.85	4.14	3.81	4.33	4.00	4.33
Economic Development	4.19	4.18	4.36	4.03	4.15	4.19	4.23
Effective Advocacy Program	3.83	3.55	4.14	3.75	3.92	3.83	3.79
Funding Support & Certainty	3.69	3.80	4.57	3.25	3.38	4.58	3.56
Regional Cooperation	4.03	4.15	4.57	3.81	3.74	4.25	4.11
Workforce	3.69	3.45	3.79	3.13	3.88	3.92	3.75
Membership Strength & Support	4.08	3.90	4.64	3.94	4.12	4.00	4.00
Local Community Support	4.02	3.97	4.29	3.92	4.12	3.75	3.97
Effective DMO Governance Model	3.99	4.30	4.21	3.75	4.07	4.00	3.75

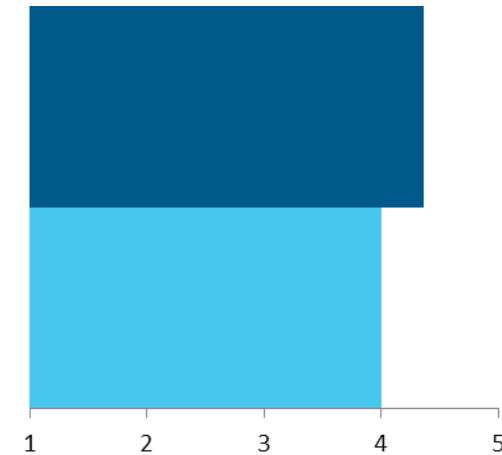
COMMUNITY SUPPORT & ENGAGEMENT	3.99
INDUSTRY AVERAGE COMMUNITY SUPPORT & ENGAGEMENT	3.60

RESULTING SCENARIO	TRAILBLAZERS
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Industry Support

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

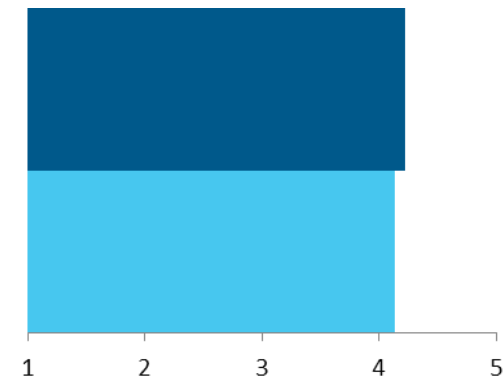
■ Industry leaders/stakeholders are supportive of the CVB



Hospitality Culture

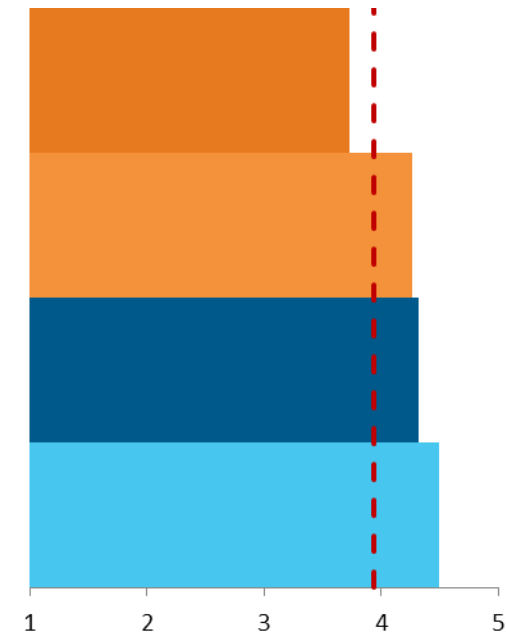
■ Reputation for offering high-quality customer service

■ Hospitality culture that welcomes visitors and improves their experience



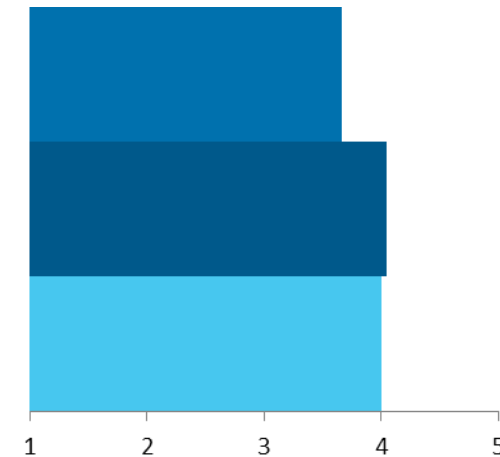
Economic Development

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



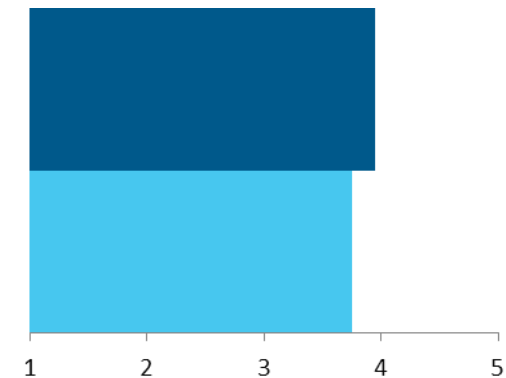
Effective Advocacy Program

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



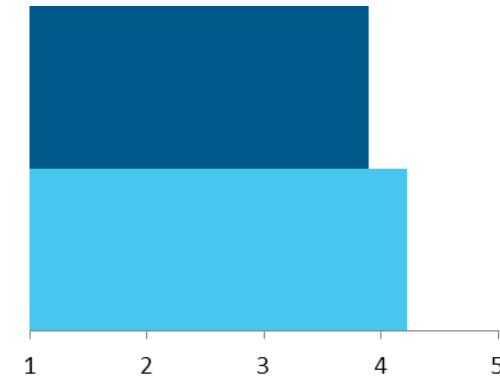
Funding Support & Certainty

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



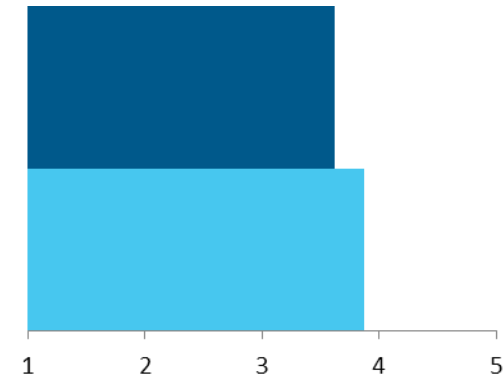
Regional Cooperation

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



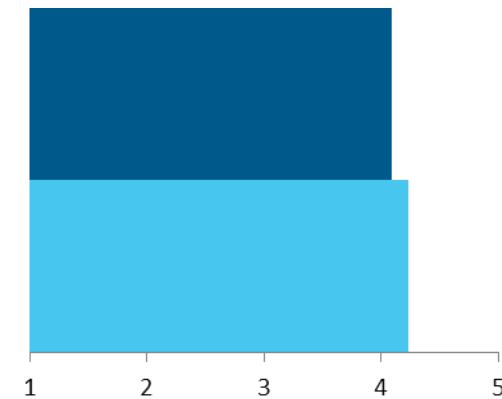
Workforce

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



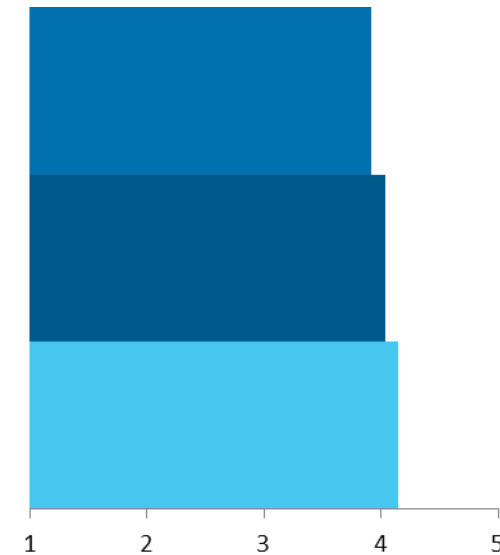
Membership Strength & Support

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



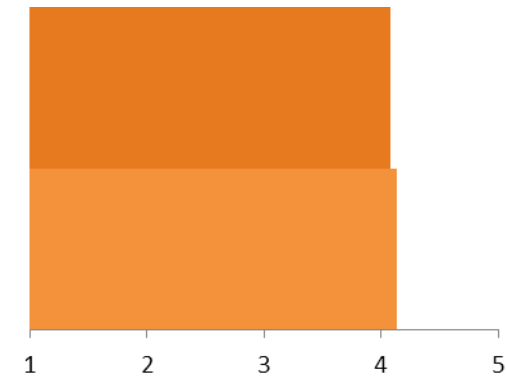
Local Community Support

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



Effective DMO Governance Model

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



Key Takeaways

- Currently in Destination Trailblazer quadrant with slightly above average score for destination strength and significantly above average score for community support & engagement
- Stakeholders are closely aligned on perceptions about destination



Destination Opportunities for Improvement

- Headquarter hotels
- Iconic attractions
- Diverse/high-quality shopping downtown
- Convention facilities for next 25 years
- Venues to host major sporting events
- Public wi-Fi
- Air access
- Airport facilities
- Public Transportation
- International destination



Community Support & Engagement Opportunities

- Tourism master plan
- Advocacy
- Stable funding
- Workforce retention

What are the biggest opportunities for us to expand our tourism industry?

Sports/Events/ Festivals (35%)

- Athletic events seem to be the largest draw for major markets. Keep up the good work bringing events to Des Moines.
- Helping and investing in locally run food festivals and bike rides that attract people from over 40 states and 7 countries.
- To expand and market the metro area as an outdoor recreational sports and activity focused destination.

Accommodations (24%)

- Host hotels with large capacity for conferences. Our group draws nearly 2,000 attendees and we traditionally use two hotels to provide capacity for 500-600 rooms on peak nights.
- The addition of the new convention center hotel, along with remodels of other properties will help expand opportunities for convention business.
- Downtown Convention Hotel

Convention Space/ Meetings (14%)

- Continued development of other meeting facilities to complement downtown facilities and overflow. Also, renovate and expand our amateur sports facilities, Baseball, Softball, Soccer and Volleyball.
- We need more indoor exhibit space for bigger trade shows and conventions.
- Some major conventions and meeting with the addition of a hotel next to Hy-Vee Hall, Wells Fargo and Community Choice.

Are there any markets we are currently not capitalizing on?

- Airbnb
- Single properties.
- Biking
- markets for unique experiences - honeymoons, vacations, family vacations/reunions
- Maybe something similar to Omaha's Beer Passport program?
- Religious
- Camping and RV rally and conventions held throughout the nation need to be courted to come to DM.
- Corporate conventions and drawing from the Midwest region of the country
- Government trade conferences. APA, AMPO, NARC, APTA, and others
- Large convention opportunities. Clearly, downtown convention hotel will open up much of this market.
- Look at the mid-size conventions.
- Mid-Size (3,000 - 5,000 people concerts). There is no mid-sized venue
- More outdoor music festivals
- national class events get people talking about the area...we already do a great job close to home
- There seems to be quite a significant number of Asian business visitors who travel to Pella and Newton and also to Dupont/Pioneer. Maybe some outreach would be appropriate.
- Those just outside of driving distance to Greater Des Moines. While there is opportunity to increase awareness in the region (driving distance to Greater Des Moines), there is opportunity to capitalize on other markets as travelers and the Millennial generation look for more authentic traveling experiences (it doesn't get more authentic than traveling to Greater Des Moines).
- Des Moines is right to pursue NCAA Division I events. Do not overlook the smaller college sporting events (e.g., NAIA)
- I think the sports industry can always grow, but I think we need to capitalize more on the STEM area.
- regional sports - becoming uncompetitive with sporting venues - i.e. soccer
- Sports
- Sports and other events where the attendees are coming for the notoriety of the event itself (e.g. NCAA events) and we don't have to overcome our geography or lack of attractions. One possibility would be to add multiple fields and expand the Raccoon Valley baseball complex to be a destination for USSSA events. There could be a baseball or softball event there almost every weekend in season if done properly. With the crossing of I-80 and I-35 Des Moines is the perfect destination for these family friendly events and there is considerable economic impact to be realized.
- Sports segment to its fullest potential.

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

Mobility & Air Access (35%)

- Cost and access of air transportation.
- Affordable Air Transportation & more direct flights
- Improving the airport is important. Improving transportation to/from the airport also needs to be addressed, particularly for international visitors.
- Public transportation and easier access for walking and biking from the airport to reach destinations such as Gray's Lake and bike trails and hotels.

Accommodations (20%)

- Completing the new hotel next to the Iowa Events Center will help attract events to Des Moines.
- Headquarters hotels for conferences
- Getting our Event Center hotel built.
- Hotel space near convention center.

Brand (15%)

- Branding, not just regionally and nationally but locally. Many locals have no idea who we are or what we do and how we help the economy. We are behind where we should be in that regard. We also need to show that we are not a "fly over" city, as many think we are. How do we break that barrier?
- Perception of Des Moines. We know how spectacular it is - others still don't completely get it!

What are the biggest issues our DMO must address?

• Regional Cooperation/Local Involvement

- Aligning, engaging, all community based organizations/ associations efforts, into overall grand growth strategy for the area.
- Borders and boundaries
- Continued support from all constituencies
- Informing the community who Catch Des Moines is, what we do and how they can help. Having the local businesses help support the cause and spread the word when visitors are here.
- Local support (including partners/corporate partners) and increasing their spend with us. We're flat-lining when it comes to that revenue source.
- More info to the public on how they can help.

• Funding for DMO

- Accountability for the significant increase in funding for the organization.
- Funding and regional support
- Long term plans for transformational use of Hotel Motel dollars.
- Revenue

• Downtown Infrastructure

- Aging infrastructure
- Facilities.
- Infrastructure expenses relating to increased tourism - i.e. police / security.

• Government Advocacy

- Execution of Capital crossroads 2.0
- To get the local decision makers to understand the economic impact and value of dollars that don't originate in the central Iowa area.

• Marketing to the Region

- Cooperative marketing.
- Promotion, letting people know all of the things to do in the metro area.

• Mobility & Air Access

- Evening & late night public transportation. Visitors need to be able to leave their car parked at the hotel and not worry about driving or parking for their night out.
- Parking. Having the meters be one price regardless of where you park downtown.
- Air travel to and from Des Moines.

• Attraction development

- Continuing to see development of riverfront which can contribute to attraction of events and ambiance for the city

• Brand of Des Moines

- Misconception about cold weather



NEXTPractices

Different Realities for DMOs/CVBs





Evaluation



Destination Strength



Community Support & Engagement



Both Drivers

Strong Community Engagement

Developing
Destination

Established
Destination

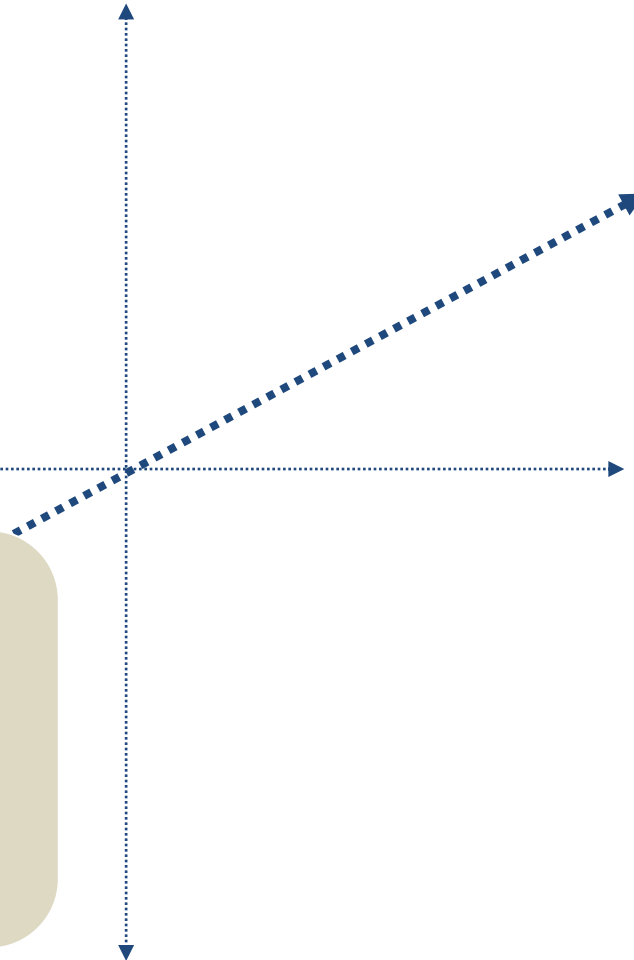
NEXT PRACTICE

- 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



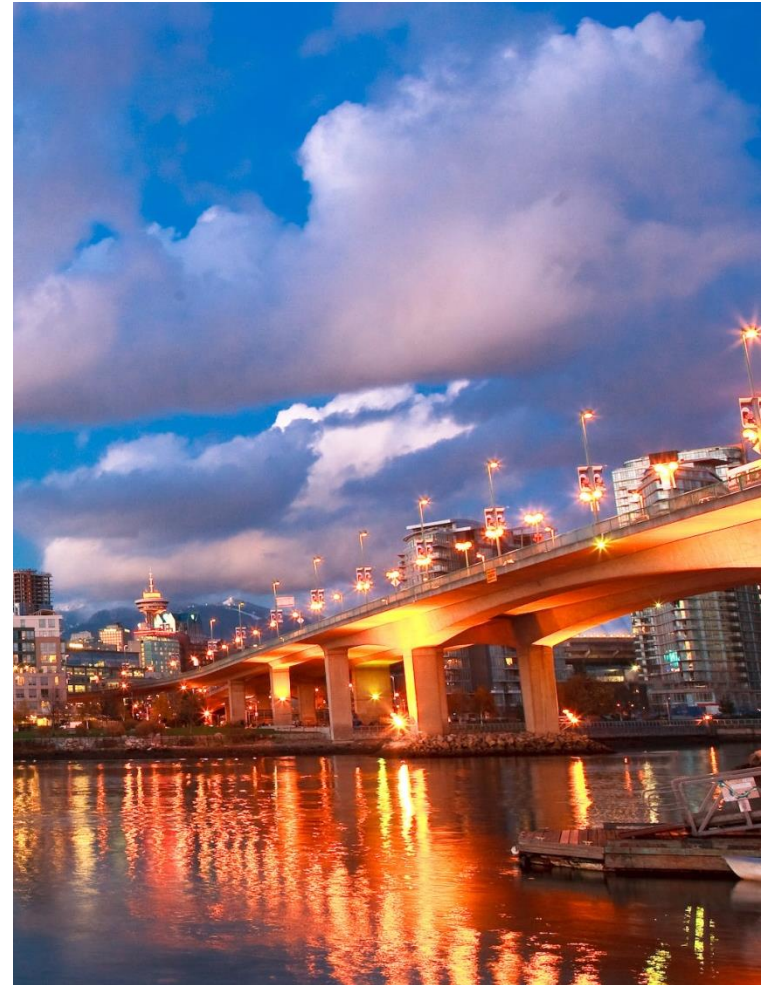
Growth of Destination Master Planning

What is Destination Master Planning?

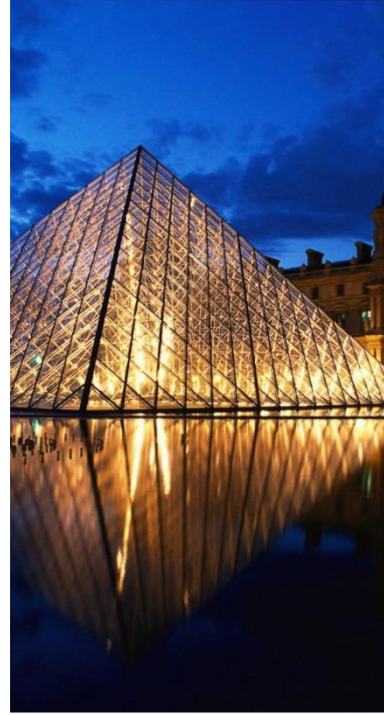
- Focus on infrastructure, facilities, services, attractions & events which need to be developed to improve overall visitor offering & experience
- Time frame of 10 years and beyond
- Coordinated with and integrated into other planning initiatives underway

Why Now?

- Fierce global competition
- Consumers demanding authentic, local and unique experiences and services



Master Plan Elements



Unique Neighborhoods

Iconic Attractions

Arts & Culture

Iconic Events

Entertainment & Shopping

- Asheville's Historic District
- San Diego's Gaslamp Quarter

- London Eye
- Winnipeg's Human Rights Museum
- St. Louis Gateway Arch

- Paris' Louvre Museum
- Pittsburgh's Andy Warhol Museum

- Providence's WaterFire
- Austin's South by Southwest

- Nashville's Music City
- Austin's Live Music

Master Plan Elements



Convention Center

- Madison's Convention Center Expansion
- Sydney's New Convention Center



Sports

- Indianapolis Grand Park
- Frisco's Warren Sports Complex



Nightlife

- Portland, Oregon
- Austin, Texas
- Nashville, Tennessee



Transportation

- Vancouver's Pacific Gateway Program
- Memphis' Air Service Development



Wayfinding

- Indianapolis Cultural Trail
- Nashville Music Wayfinding Plan

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?



3 Most Important Issues

1	2	3
Branding & awareness		Branding
Sales – heads in beds		Sales – pressure with more hotels
Stable revenue source		
	Airport & mobility	
	Sports venues/watertrails	
	Events in July & Dec	
		Tourism Master Plan

Most Important CVB Action

1	2	3
Marketing campaign – cooperative campaign	Marketing campaign	
		Tourism Master Plan