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

Greater Des Moines Convention & Visitors Bureau
November 16, 2016
92 Responses

- Community Leaders: 26%
- Management Team: 11%
- Board of Directors: 10%
- Bureau Partners/ Stakeholders: 16%
- Customers: 30%
- Government Leaders: 7%
Age Demographic

- Over 65: 16%
- 18 - 34: 14%
- 35 - 49: 27%
- 50 - 64: 43%
Des Moines Overall Assessment - Industry

Strong Community Engagement

VOYAGERS

TRAILBLAZERS

Developing Destinations

Established Destinations

Des Moines

EXPLORERS

MOUNTAINEERS

Weak Community Engagement
Des Moines Overall Assessment – United States

Strong Community Engagement

VOYAGERS

United States Average

Des Moines

Developing Destinations

TRAILBLAZERS

Established Destinations

EXPLORERS

Weak Community Engagement

MOUNTAINEERS
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
Des Moines Overall Assessment - Stakeholder

Strong Community Engagement

VOYAGERS
- Developing Destinations

TRAILBLAZERS
- Des Moines Average
  - Board of Directors
  - Customers
  - Management Team

EXPLORERS
- Bureau Partners/Stakeholders
- Community Leaders

MOUNTAINEERS
- Weak Community Engagement
Des Moines Overall Assessment – Age Group

Strong Community Engagement

VOYAGERS

TRAILBLAZERS

EXPLORERS

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Established Destinations

Des Moines Average

35 - 49

18 - 34

50 - 64

Over 65
## Destination Strength Rankings - Industry

<table>
<thead>
<tr>
<th>Brand</th>
<th>Relative Importance</th>
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**RESULTING SCENARIO**

**DESTINATION STRENGTH - Des Moines**: 3.61

**INDUSTRY AVERAGE DESTINATION STRENGTH**: 3.49

**TRAILBLAZERS**

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**Variable**

- Accommodation
- Attractions & Entertainment
- Convention & Meeting Facilities
- Sports & Recreation Facilities
- Communication & Internet Infrastructure
- Air Access
- Mobility & Access
- Events
- Brand
- Destination Performance

**Relative Importance (0-100%)**

- Industry Average
- Des Moines Average
- Standard Deviation

**Perceived Performance (1-5 scale)**

- Industry Average
- Des Moines Average
- Standard Deviation
## Destination Strength: Report Card – Stakeholder Group

### Variable Des Moines Average Management Team Board of Directors Bureau Partners/ Stakeholders Customers Government Leaders Community Leaders

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<tr>
<th>Variable</th>
<th>Des Moines Average</th>
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**DESTINATION STRENGTH** 3.61  
**INDUSTRY AVERAGE DESTINATION STRENGTH** 3.49

**RESULTING SCENARIO** TRAILBLAZERS
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

Bar chart showing the levels of 1 to 5.
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

<table>
<thead>
<tr>
<th>Relative Importance</th>
<th>Perceived Performance</th>
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<tr>
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## Community Support & Engagement Ranking Des Moines

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**COMMUNITY SUPPORT & ENGAGEMENT - Des Moines** 3.99  
**INDUSTRY AVERAGE COMMUNITY SUPPORT & ENGAGEMENT** 3.60  

**RESULTING SCENARIO** TRAILBLAZERS
## Community Support & Engagement: Report Card – Stakeholder Group

### Perceived Performance (1-5 scale)

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**COMMUNITY SUPPORT & ENGAGEMENT**

3.99

**INDUSTRY AVERAGE COMMUNITY SUPPORT & ENGAGEMENT**

3.60

**RESULTING SCENARIO**

TRAILBLAZERS
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?

<table>
<thead>
<tr>
<th>Sports/Events/Festivals (35%)</th>
<th>Accommodations (24%)</th>
<th>Convention Space/Meetings (14%)</th>
</tr>
</thead>
<tbody>
<tr>
<td>• Athletic events seem to be the largest draw for major markets. Keep up the good work bringing events to Des Moines.</td>
<td>• 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.</td>
<td>• 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.</td>
</tr>
<tr>
<td>• Helping and investing in locally run food festivals and bike rides that attract people from over 40 states and 7 countries.</td>
<td>• The addition of the new convention center hotel, along with remodels of other properties will help expand opportunities for convention business.</td>
<td>• We need more indoor exhibit space for bigger trade shows and conventions.</td>
</tr>
<tr>
<td>• To expand and market the metro area as an outdoor recreational sports and activity focused destination.</td>
<td>• Downtown Convention Hotel</td>
<td>• Some major conventions and meeting with the addition of a hotel next to Hy-Vee Hall, Wells Fargo and Community Choice.</td>
</tr>
</tbody>
</table>
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?

<table>
<thead>
<tr>
<th>Mobility &amp; Air Access (35%)</th>
<th>Accommodations (20%)</th>
<th>Brand (15%)</th>
</tr>
</thead>
<tbody>
<tr>
<td>• Cost and access of air transportation.</td>
<td>• Completing the new hotel next to the Iowa Events Center will help attract events to Des Moines.</td>
<td>• 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 &quot;fly over&quot; city, as many think we are. How do we break that barrier?</td>
</tr>
<tr>
<td>• Affordable Air Transportation &amp; more direct flights</td>
<td>• Headquarters hotels for conferences</td>
<td>• Perception of Des Moines. We know how spectacular it is - others still don’t completely get it!</td>
</tr>
<tr>
<td>• Improving the airport is important. Improving transportation to/from the airport also needs to be addressed, particularly for international visitors.</td>
<td>• Getting our Event Center hotel built.</td>
<td></td>
</tr>
<tr>
<td>• 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.</td>
<td>• Hotel space near convention center.</td>
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</tr>
</tbody>
</table>
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
Different Realities for DMOs/CVBs

- Strong Community Engagement
- Weak Community Engagement
- Developing Destination
- Established Destination

VOYAGERS

TRAILBLAZERS

EXPLORERS

MOUNTAINEERS
Practices

**Core**
An important, but common practice for a DMO

**Best**
A practice that shows superior marketplace and/or community result

**NEXT**
A new and innovative practice and/or idea which could be transformative for DMOs and destinations
Evaluation

Regional Workshop Input

Project Team Refinement

Online Survey of DMO Leaders

124

54

10 NEXT PRACTICE

20 BEST PRACTICE
Destination Strength

Strong Community Engagement

Established Destination

Developing Destination

Weak Community Engagement

NEXT PRACTICE
- Cognitive Systems
- Mining Big Data
- Proximity Marketing
- Social Media Command Center

BEST PRACTICE
- Air Service Development Program
- Attraction Development
- Brand Development and Planning
- Event Subvention Management
- Professional Congress Organizer Partnership
- Micro Market Segmentation
- Organic Marketing
- Tourism Development Zone
- Wi-Fi Accessibility
Community Support & Engagement

Strong Community Engagement

Developing Destination

Established Destination

Weak Community Engagement

• CSR and Sustainability
• DMO Network Model

Next Practice

• 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
Both Drivers

Strong Community Engagement

Developing Destination

Established Destination

Weak Community Engagement

- DMO Association Development
- Shared Economy Collaboration

- Tourism Infrastructure Crowdfunding

NEXT PRACTICE

- Destination Brand Unification
- DMO Generated Events
- Formalized Economic Development

BEST PRACTICE

- Non-Industry Destination Advocates
- Tourism Master Planning
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
- Asheville’s Historic District
- San Diego’s Gaslamp District

Iconic Attractions
- London Eye
- Winnipeg’s Human Rights Museum
- St. Louis Gateway Arch

Arts & Culture
- Paris’ Louvre Museum
- Pittsburgh’s Andy Warhol Museum

Iconic Events
- Providence’s WaterFire
- Austin’s South by Southwest

Entertainment & Shopping
- 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
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

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<tbody>
<tr>
<td>1</td>
<td>Branding &amp; awareness</td>
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<td>Branding</td>
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<td></td>
<td>Sales – heads in beds</td>
<td>Sales – pressure with more hotels</td>
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<td></td>
<td>Stable revenue source</td>
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<td>Airport &amp; mobility</td>
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<td>Sports venues/watertrails</td>
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<td>Events in July &amp; Dec</td>
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<td>Tourism Master Plan</td>
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## Most Important CVB Action

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<td>Marketing campaign – cooperative campaign</td>
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