

DUPAGE COUNTY

CONVENTION & VISITORS BUREAU



GPS- A Tourism Roadmap

DCVB Annual Meeting



Tourism Roadmap

1. Outline preliminary findings
2. Identify critical county issues
3. Receive feedback – direction
4. Use as team refines and develops strategies and recommendations



Input Areas



Advisory Council

- Accommodations
- Shopping
- Arts – Heritage
- Outdoor Recreation
- Sports
- Dining
- Education
- Mayors & Managers
- Municipal
- Chamber



Input Process

1. Input sessions July
 - NIU Conference Center
 - Wilder Mansion
 - Culinary & Hospitality Center at College of DuPage
2. One on one interviews
3. Roadmap Website
4. 200+ participants



Key Themes

1. The group market is of key importance
2. Must broaden who and how we connect
3. Increased focus on integrated product offerings is crucial
4. We need to cooperate internally, and compete externally, to maximize the DuPage visitor industry.



GPS- A Tourism Roadmap

Customers and
Market Performance

2015 Visitor Industry Scale

- \$2,477,020,000 in visitor expenditures
- 22,210 jobs
- \$42,080,000 in local tax receipts
- 15,000 rooms – second only to Chicago CBD

Key industry cluster!

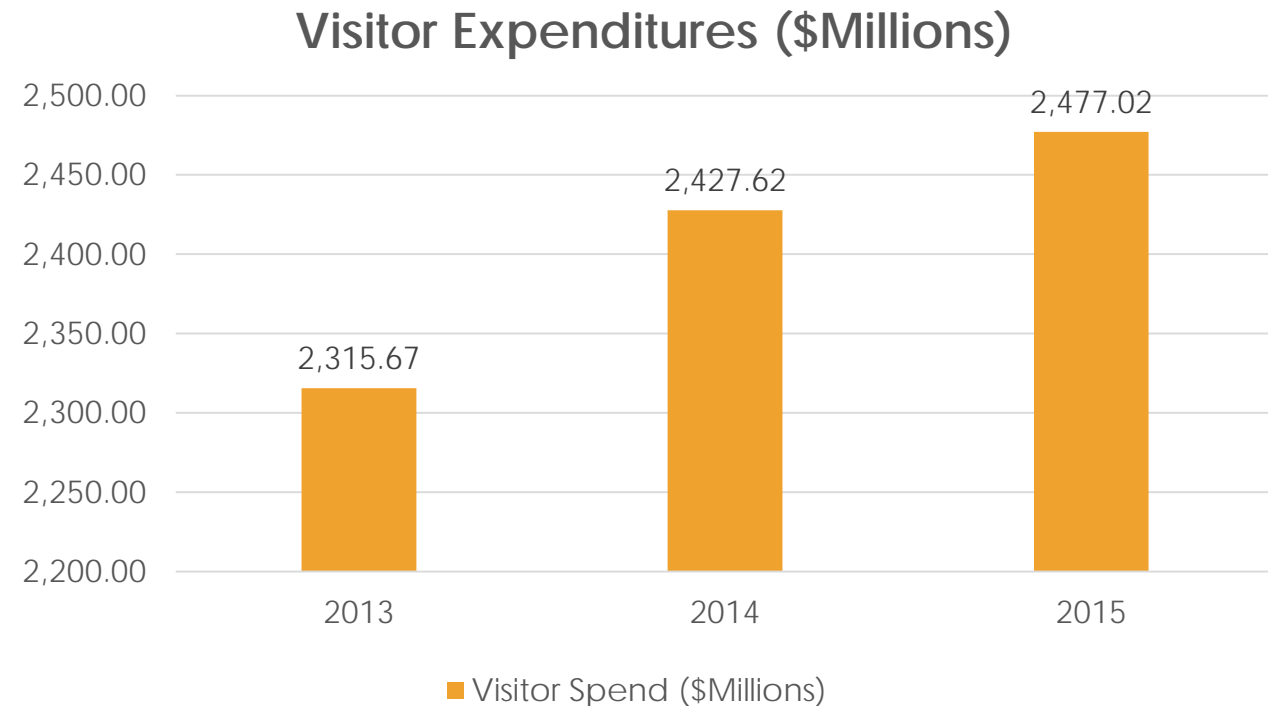
Visitor industry continues to demonstrate healthy growth!

Improving occupancies and ADRs!

Source: USTA &STR

Growth in Visitor Expenditures

- DuPage has seen consistent growth in visitor spending over the past three years
 - 2014 +4.8%
 - 2015 +2.0%
- An additional \$161 million of visitor spending has been attracted to DuPage County just since 2013



Source: USTA

Lodging Trends – Chicago CBD as a Benchmark

- DuPage has seen continued improvements in both Occ and ADR
- Variance in occupancy from Chicago is moderating
- DuPage “value” is still being maintained

Lodging Occ and ADR Trends - Variance From Downtown Chicago

	DuPage			DuPage Var	
Year	Occ	ADR		Occ	ADR
2012	62.0	\$90.58		-12.7	49.9%
2013	63.2	\$91.70		-11.6	48.8%
2014	65.0	\$94.82		-10.7	47.7%
2015	65.5	\$99.61		-10.5	47.7%

Source: STR

Market Share – All Important Measure



Cook County Attracting Increased Share of Illinois Market

	2013	2014	2015
Cook	66.30%	66.58%	66.72%
DuPage	7.27%	7.23%	7.19%

Source: NTG based on USTA data

The Implications?

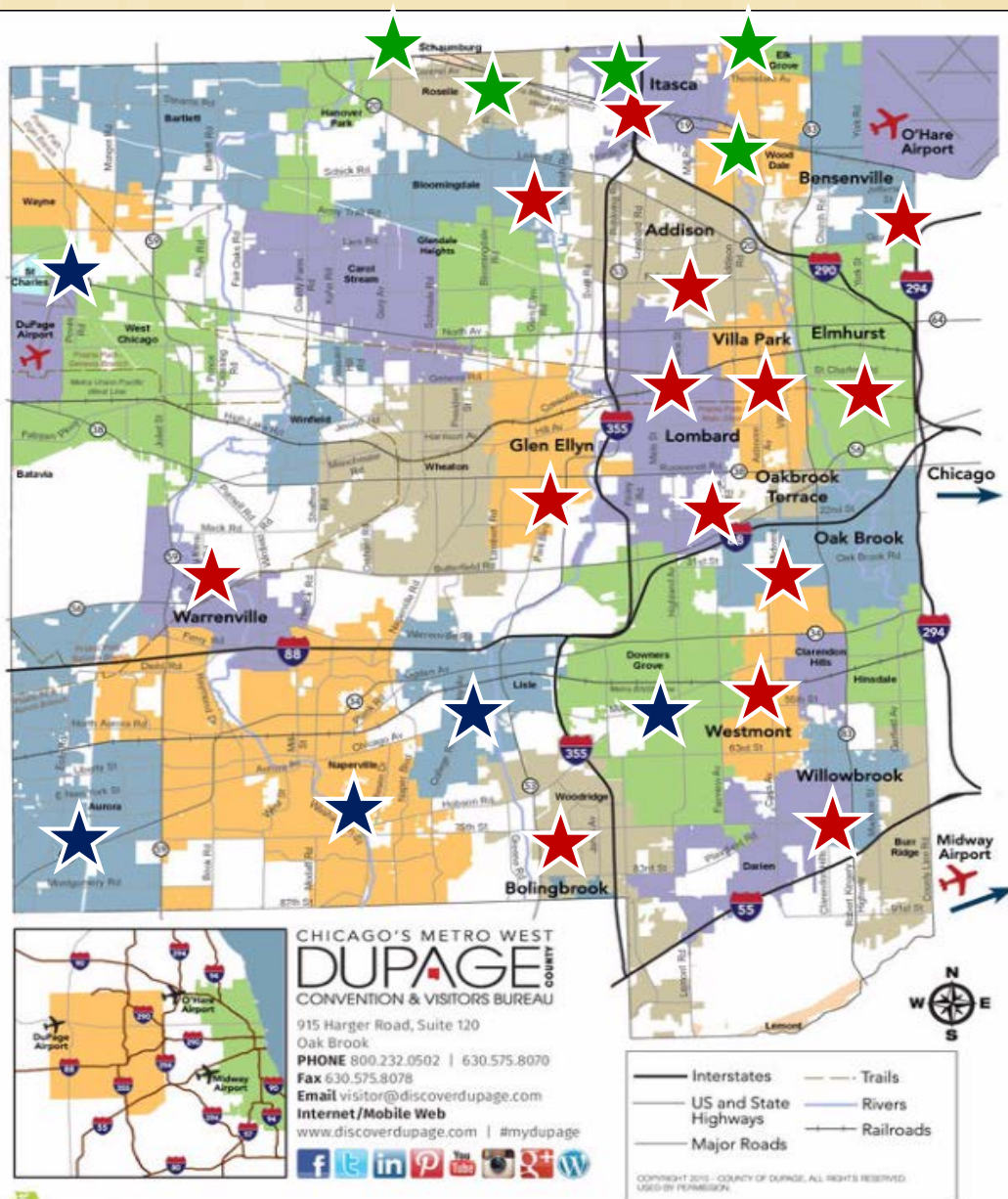
- If DuPage had maintained its 2013 market share in 2015, significant additional spending, lodging demand and tax generation would have been experienced
- The competitive bar is not standing still – the broader County faces increasing competitive challenges

\$27 million additional visitor spending

4,700 additional room nights

\$463,000 additional local tax receipts

Source: NTG based on USTA and DK Shifflet data



DCVB Members

- Addison
- Bensenville
- Bolingbrook
- Elmhurst
- Glen Ellyn
- Itasca
- Lombard
- Oak Brook
- Oakbrook Terrace
- Villa Park
- Warrenville
- Westmont
- Willowbrook

Separate CVBs

- Aurora (Certified)
- Downers Grove
- Lisle
- Naperville
- St. Charles (Certified)

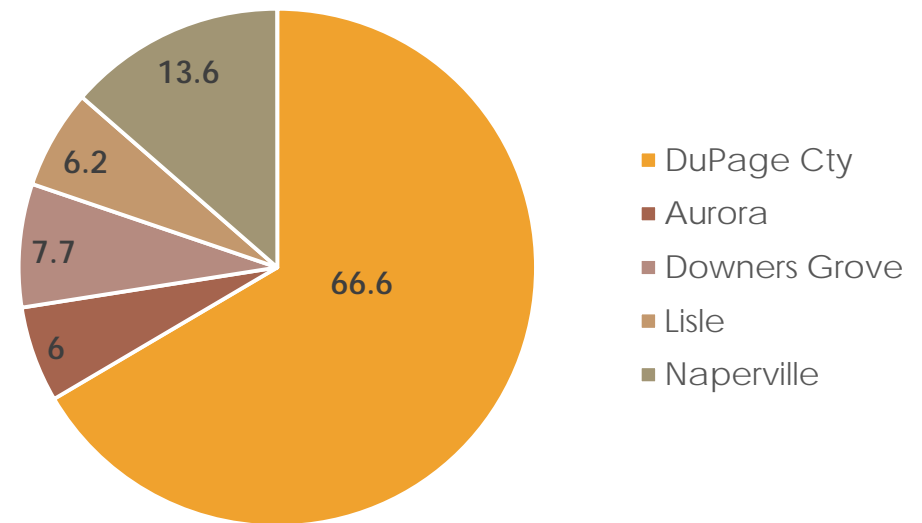
Meet Chicago NW

- Elk Grove Village
- Itasca
- Roselle
- Schaumburg
- Wood Dale

Distribution of DuPage County Lodging Inventory

- DuPage County's 15,000+ room base is distributed throughout the County
- The four largest communities with separate DMOs represent about 1/3rd of the room base
- The room base represented by separate DMOs is primarily concentrated in the southwest portions of the County

Room Base Distribution
% of County Room Base

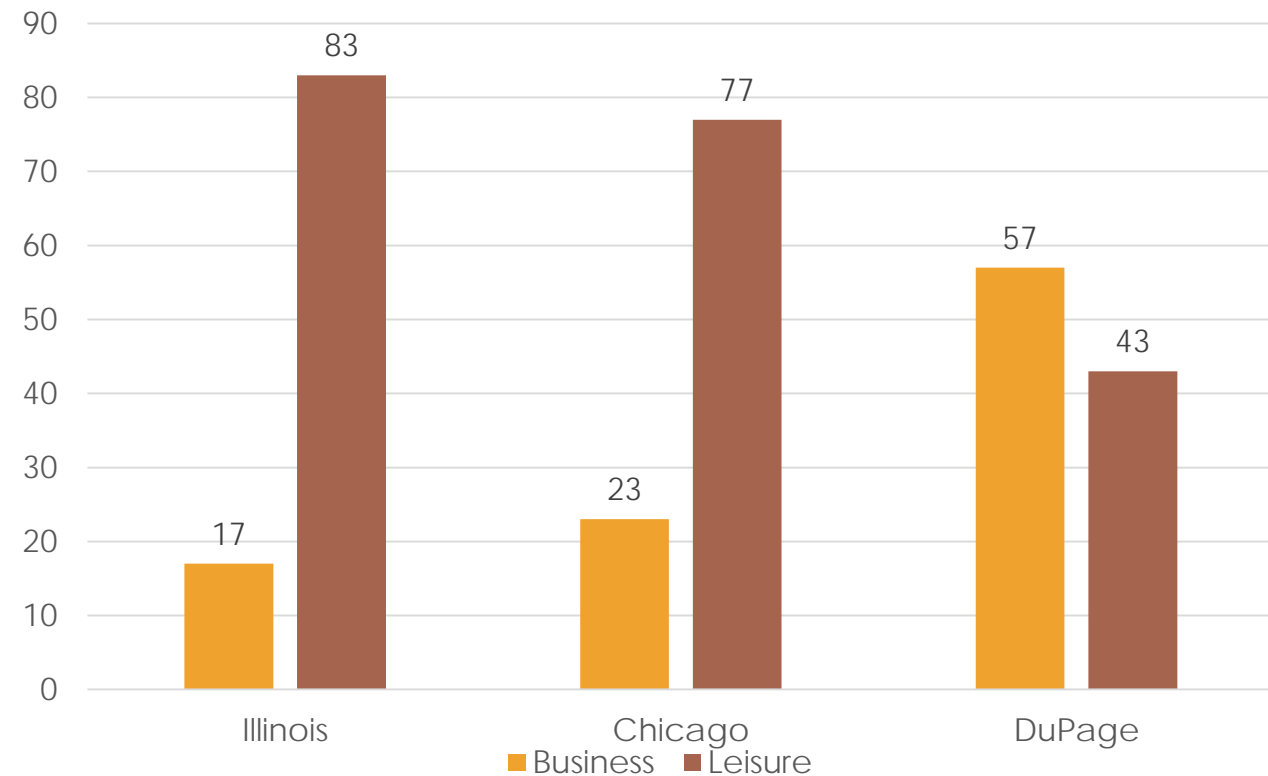


Source: STR

Person Stay Composition

- Leisure visitors dominate Illinois and Chicago demand – more moderate in DuPage
- Both segments important to communicate with

Visitor Composition



Source: Illinois and Chicago - DK Shifflet 2015
DuPage - NTG and DCVB estimate

Shifting Capture Rates

- Demand growth in Chicago person stays has been driven largely by increases in leisure segments – leisure reflects an increasing share of U.S. market – share of business declining
- A key factor in DuPage's declining market share

Chicago Share of U.S. Market

	Business	Leisure
2011	2.12	1.24
2012	2.12	1.25
2013	2.07	1.25
2014	2.02	1.25
2015	2.03	1.28

DK Shifflet 2015

Growth Primarily in Leisure

- Leisure segments account for 79% of demand nationally, but accounted for 90% of new demand between 2011 and 2015
- While business is expected to increase its share of demand growth, leisure continues to drive expansions in demand

% of Past and Forecasted U.S. Growth

Segment	2011-15	2016	2017	2018
Leisure	90%	93%	88%	85%
Business	10%	7%	12%	15%

Source: US Travel Assoc



A Fundamental Question

Who are DuPage
high value visitor
segments?



An Important Perspective

High income,
stronger spending,
conference/group
guests

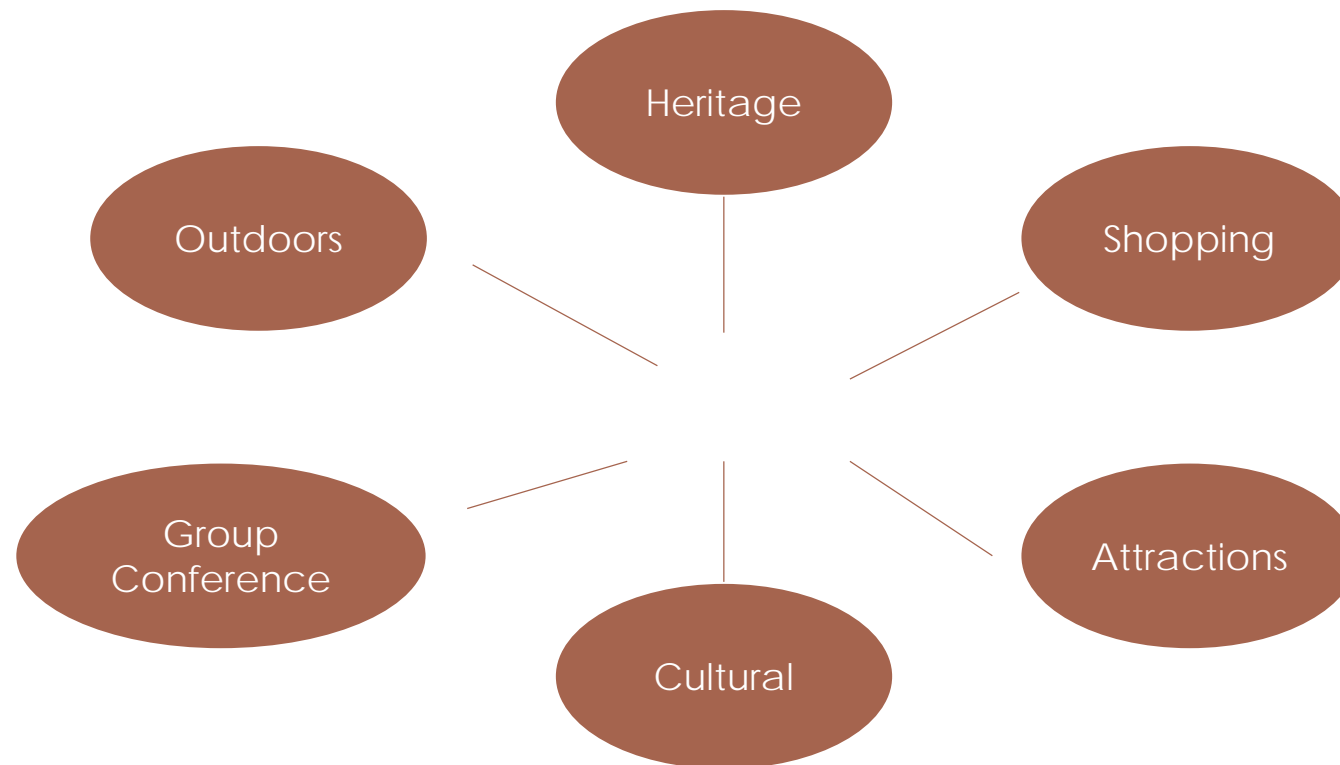
High Value - Other Considerations?

Building demand in leisure segments?

Focus on segments that would attract younger segments to perceive DuPage differently ?

Targeting segments that reinforce those targeted by DuPage economic development?

Connecting the DuPage Dots



Are we making it easy for visitors to speak to all their interests/wants?

Critical Issues Customers

1. Refine Customer Targets – meet multiple objectives
2. More focus on “strengths” and better blending of experiences
3. Offer full range of assets – maximize collective power



GPS- A Tourism Roadmap

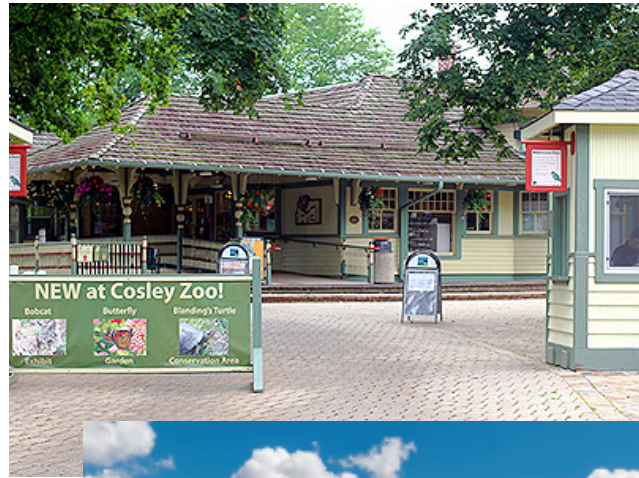
Products

Fundamental Change in DMO Thinking

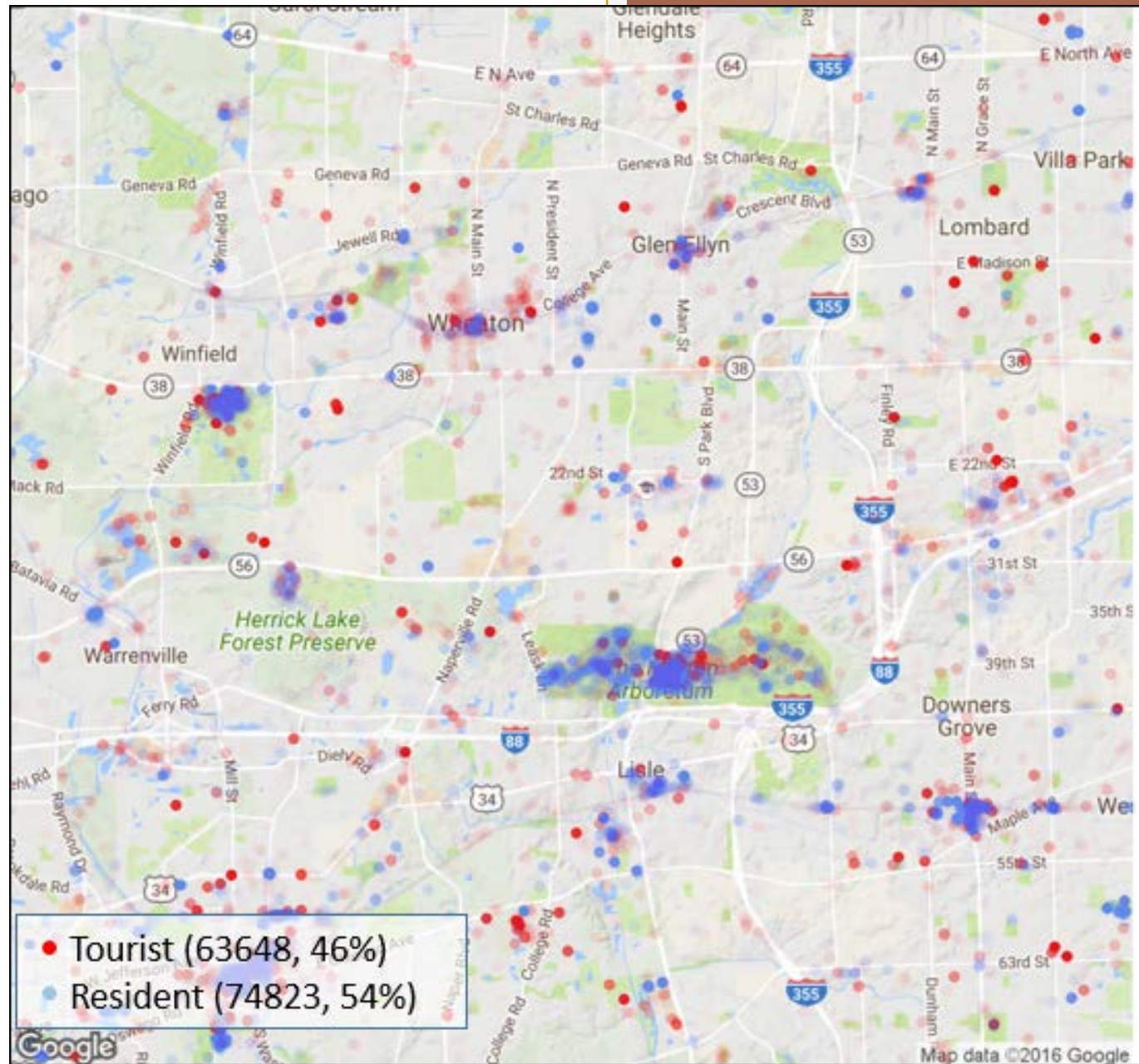
Strategic

**Destination “Management”
Organization**

DuPage Products



Courtesy of the Forest Preserve District of DuPage County



DCVB Linking and Integrating Communities

DUPAGE CONVENTION & VISITORS BUREAU Five Top Trip Ideas

#1: The Ultimate Route 66 Experience



Get your Kicks the American Way

There's nothing better than exploring Chicagoland's Route 66 while driving in an American Classic Car, such as a 1935 Roadster or a 1956 Ford Thunderbird. Pick your dream classic car and experience your "Ultimate Route 66" trip in DuPage County.



DUPAGE CONVENTION & VISITORS BUREAU Five Top Trip Ideas #4: Science and Technology

The Illinois Technology and Research Corridor is a region of commerce and industry located along Interstate 88 in DuPage County, just a few miles west of Chicago. The corridor is home to the headquarters or regional centers for many Fortune 1000 companies that specialize in research, development, logistics and technology. DuPage County is also home to the world leaders in science and technology, Argonne National Laboratories and Fermi Lab. Exploring the facilities of these two research facilities would not be complete without a visit to Chicago's Museum of Science and Industry.



Argonne National Laboratory
One of the top scientific destinations in the world, Argonne is the oldest national research institution in the United States. Chartered in 1946, it occupies 1,500 wooded acres and is located just 25 miles southwest of Chicago in DuPage County. Argonne's highly collaborative community of scientists and unmatched scientific facilities provide a unique environment that sets the stage for extraordinary research breakthroughs.



Fermi National Accelerator Laboratory
Located on 6,800 acres, Fermilab was commissioned on November 21, 1967 by the U.S. Atomic Energy Commission. Home to the world's former highest energy particle accelerator, Tevatron, Fermilab has worked to answer fundamental questions and enhance our understanding of everything we see around us.

As the United States' premier particle physics laboratory, Fermilab works on the world's most advanced particle accelerators and digs down to the smallest building blocks of matter. They also probe the farthest reaches of the universe, seeking out the nature of dark matter and dark energy.

Fermilab collaborates with more than 20 countries on physics experiments based in the United States and elsewhere.

DUPAGE CONVENTION & VISITORS BUREAU Five Top Trip Ideas

#3: In Bloom – A Planter's Palette

Day 1 - Gardens in DuPage

Bell Horticultural - The Gardens at Bell



Bell Horticultural Company in West Chicago began as a wholesale cut flower operation that was started by George J. Bell in 1905. It has grown into a leader in all facets of horticulture - a global family of breeders, researchers, developers, seed and vegetative producers, and distributor to six continents in 18 countries.

The Gardens

The Gardens at Bell have been the evaluation and testing grounds for the world's wealth of horticultural introductions and began as a row trial garden for seed varieties in 1933 has grown to encompass over 90 acres. The gardens are designed to inspire visitors as they compare products in an exciting way for home garden and commercial settings.



DUPAGE CONVENTION & VISITORS BUREAU Five Top Trip Ideas #2: Architectural Sights

These attractions and historical places are included in the American Institute of Architects' list of "Illinois' 150 Great Places."

DuPage County's Architectural Wonder BAPS Mandir Complex



The BAPS Shri Swaminarayan Mandir Complex in Bartlett has become the focus of interest and wonder for thousands of local citizens and people visiting the Chicago area. The fusion of traditional Indian architecture with modern technology has attracted people from all walks of life. From visiting school groups to architects, all have been amazed by the Mandir's stunning architecture and breathtaking artistry.

Festivals are celebrated on a grand scale at the Mandir throughout the year. Marking the Hindu New Year, Diwali and Anantkut are the grandest of the Hindu festivals and are celebrated with dazzling lights, sights, smells, and sounds.



Oakbrook Center

Morton Arboretum

North Central College

DuPage Historical Museum

McCormick House - Mies Van Der Rohe



DUPAGE CONVENTION & VISITORS BUREAU Five Top Trip Ideas

#5: Chicagoland's Holiday Traditions

Kick-off the holiday season by experiencing spectacular festivities and holiday traditions celebrated in the Chicago area. Holiday shopping is worth a trip to DuPage County, just west of Chicago.

Day 1 - Shopping Beyond Chicago's Skyline

Oakbrook Center, one of the Chicago area's premier upscale shopping destinations, is a great place to start. Enjoy shopping for gifts while surrounded by twinkling lights and immersed in holiday festivities.



No matter what time of shopping you like to do, you will find it in one of the several shopping areas in DuPage County. Visit the upscale shopping areas in DuPage County, like Chicago Premium Outlet or Fashion Outlet of Chicago, or visit the historic shopping areas in DuPage County.



by Magic" at Brookfield Zoo, where you can join caroling to zoo animals by the spectacular displays of holiday lights at The Morton Arboretum's

Using Gardens to Link Communities

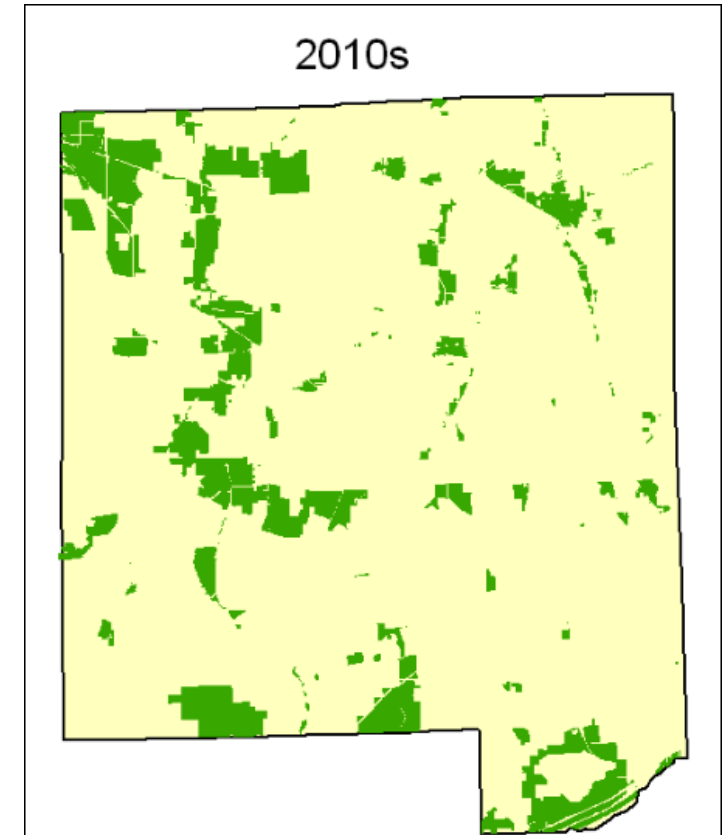
- 19 gigantic gardens – 21 hand painted murals – May 30th / Oct 1st
- Links and integrates communities – point of pride
- Hard copy map, mobile app, master gardener guidebook



AmishCountry.org
NORTHERN INDIANA

Forest Preserve District DuPage County

- More than 60 forests
 - 25,000 acres of land
 - 600 acres of lakes
 - 47 miles rivers and streams
 - 145 miles of trails
- 12% of all land in DuPage County
- More than 3.4 million visitors annually



Engage Non-Traditional Partners



Visiting NREL

To plan your visit, select the location below. Not sure? Contact your NREL host to confirm the location for your meeting.



New Product Development

- The Natatorium at Westmont - one of the fastest competition pools in the country
- Bring visitors and competitors from all over the world - an environment for Olympic trial qualifiers and NCAA competitors
- The Natatorium will be a destination for swimmers and many swimming events, while also serving the community and the people of Westmont



Project Overview
Natatorium

The Natatorium at Westmont

Change in Roles

Think
“Destination
Architect”

Critical Issues Products

1. Individually highlight and blend tourism product offerings
2. Proactively develop and direct tourism products –DCVB as integrator
3. Focus on “nature-based” assets and non-traditional partners

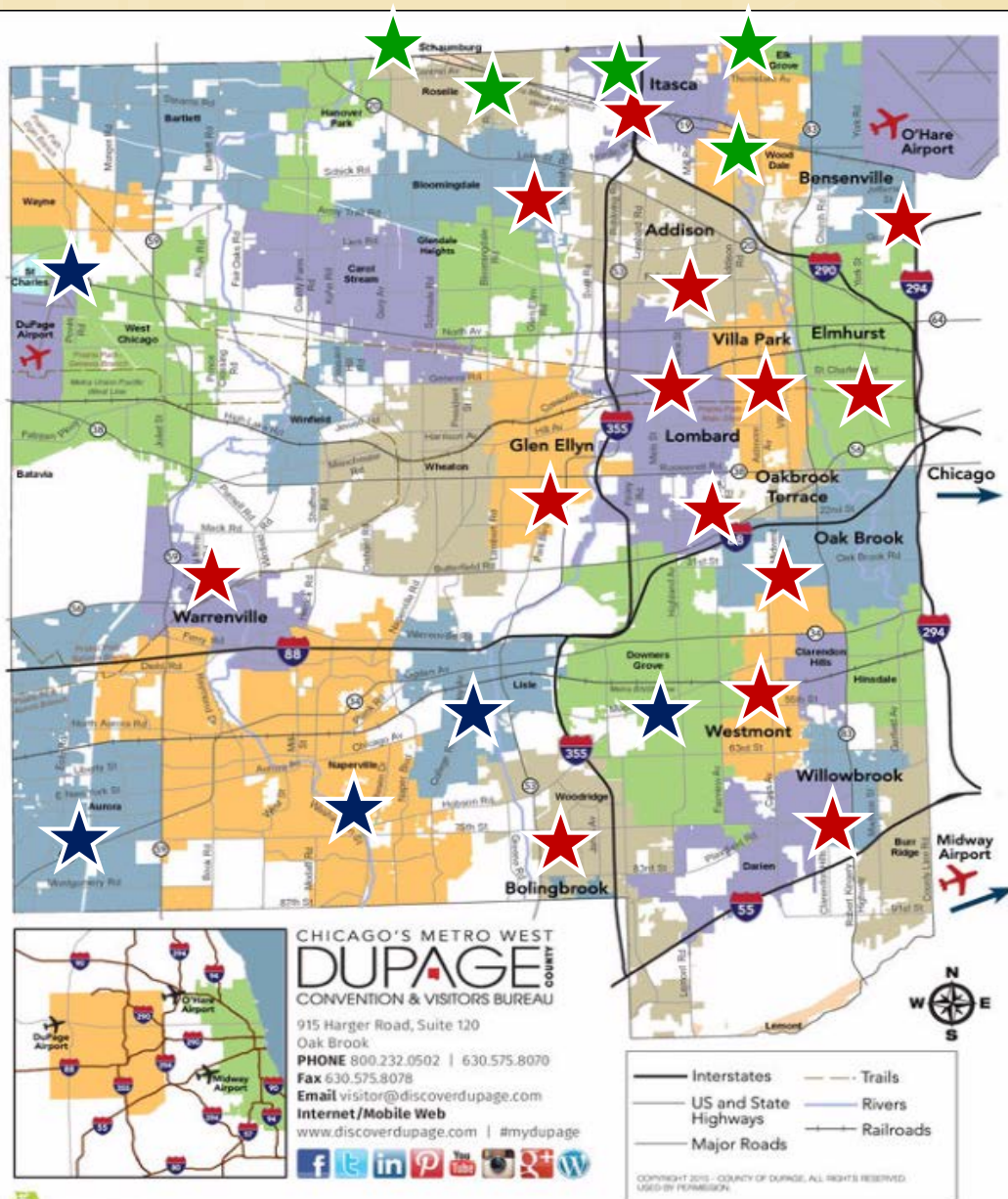


GPS- A Tourism Roadmap

Delivery Systems

Identity of DuPage County

Is there a clear
image in a visitors
mind?



DCVB Members

- Addison
- Bensenville
- Bolingbrook
- Elmhurst
- Glen Ellyn
- Itasca
- Lombard
- Oak Brook
- Oakbrook Terrace
- Villa Park
- Warrenville
- Westmont
- Willowbrook

Separate CVBs

- Aurora (Certified)
- Downers Grove
- Lisle
- Naperville
- St. Charles

Meet Chicago NW

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- Roselle
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- Wood Dale

Fractured Representation



DuPage County: Chicago's Metro West



Chicago's Premier Western Suburb



WELCOME TO AURORA AREA
The Best Mix of Urban & Suburban

Think From The Customer's Perspective

**DCVB as umbrella organization telling
holistic DuPage story**



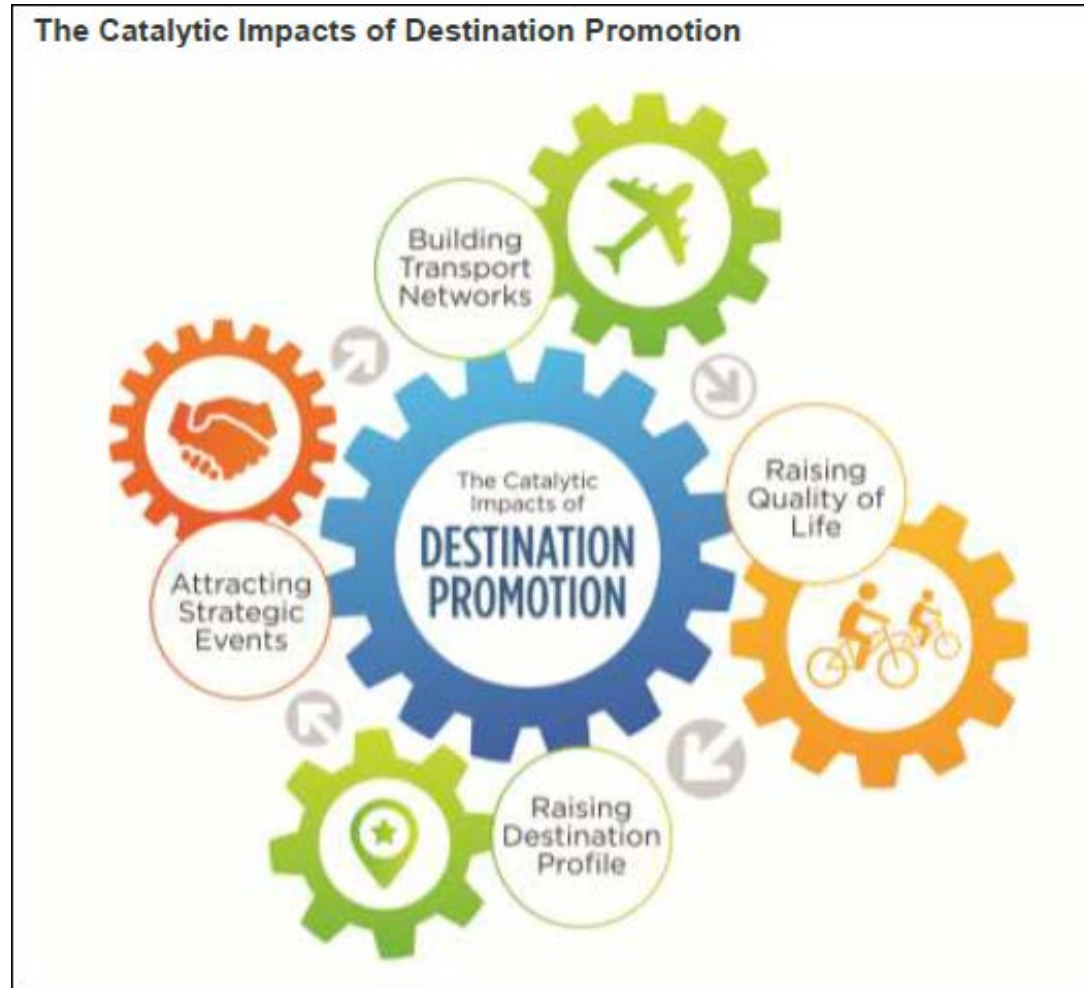
**Maximize cooperative opportunities with
separate DMO organizations throughout
DuPage**

DMO Direction Nationwide



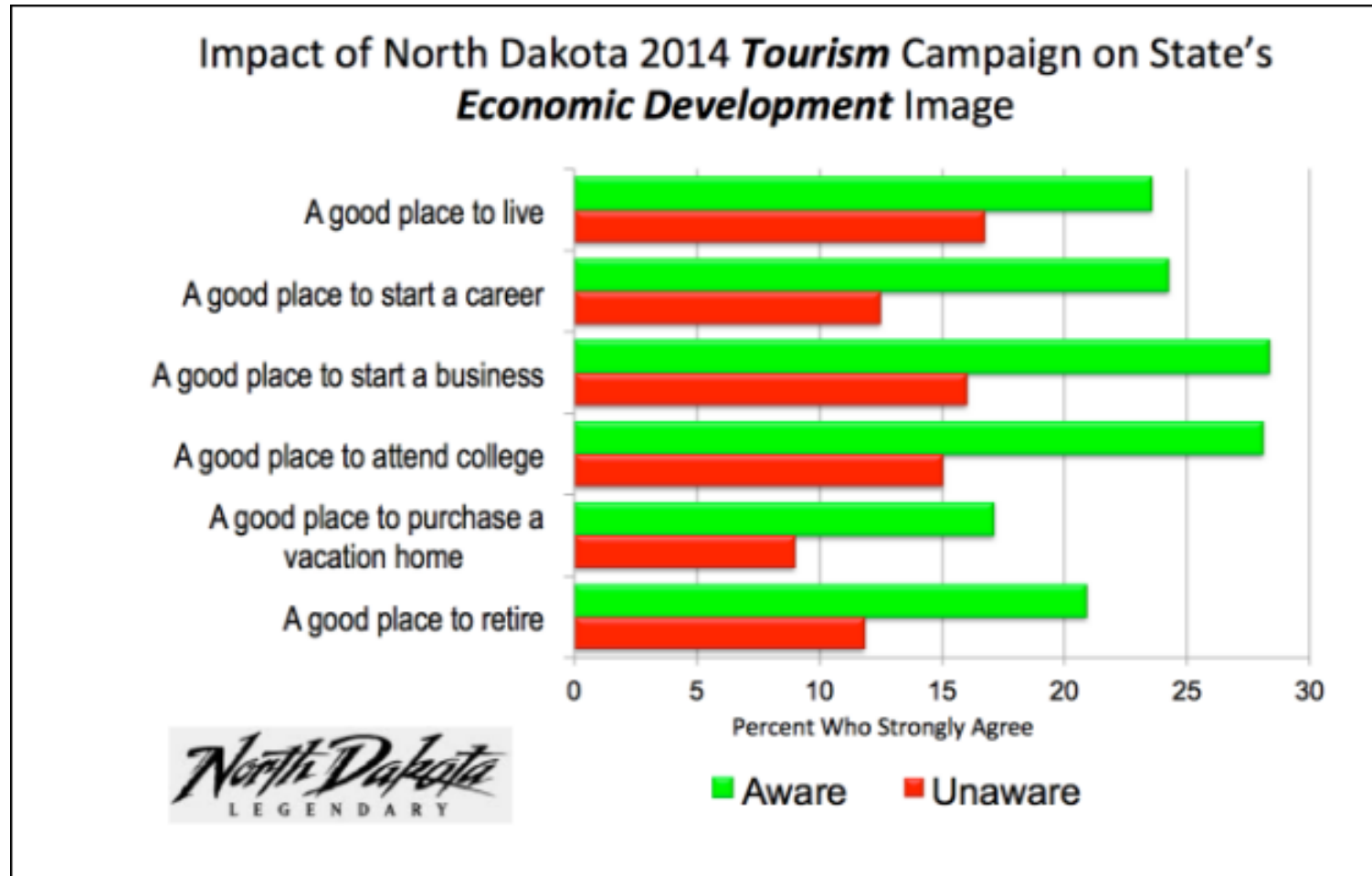
**Deeper
Community
Engagement**

Are We Telling Full Story



Source: Oxford Economics

Not Just Visitor Connection



Brand

- Are we speaking to both group, conference and independent leisure market
- Are we connecting and representing the entire County
- We must compete on more than just value

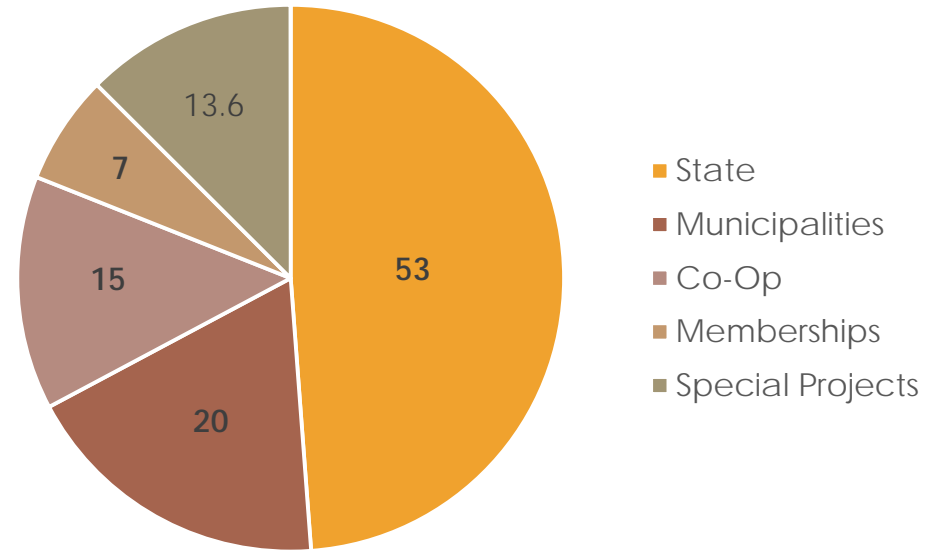


"Just a few miles from Chicago, the 38 communities of DuPage County combine the excitement of one of the country's top metropolitan areas with the comfort, convenience and value of Chicago's western suburbs."

DCVB Resources

- State of Illinois funding provides over half of organizational resources
- 14 municipalities + County collectively account for 20% of resources
- Membership fees account for 7% of total

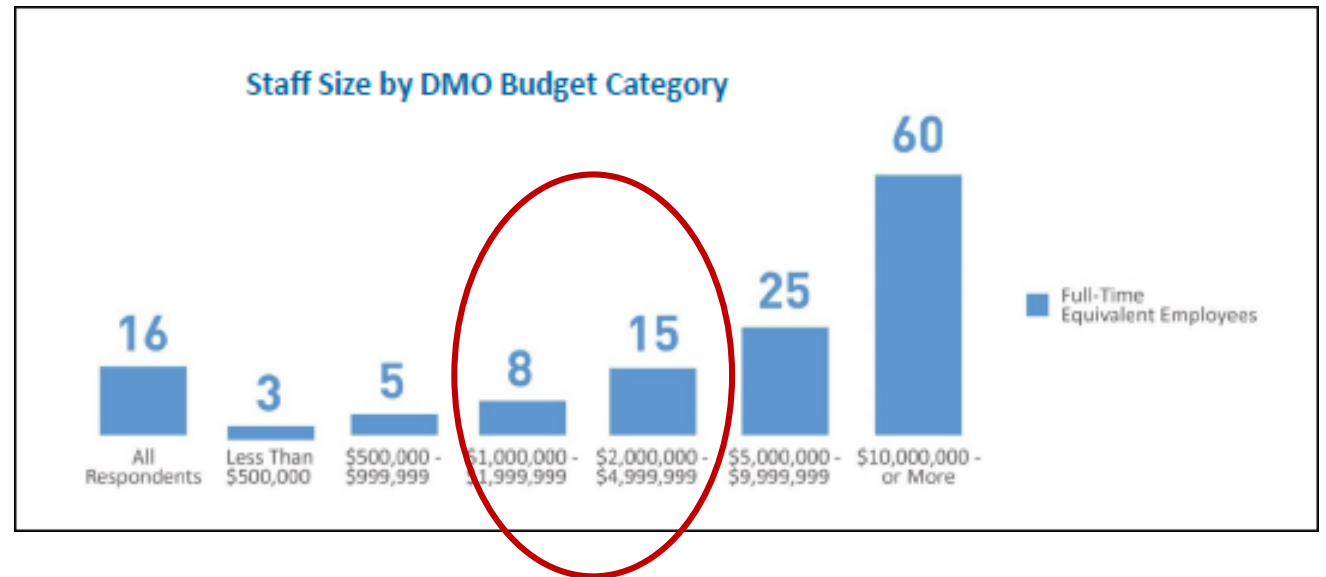
Composition of Resources



Source: DCVB

DCVB Staffing

- DCVB currently has 7 FTE staff members
- On a national basis, DMO's in the 1-2 million budget range average 8 FTEs and 2-5 million average 15 FTEs



Source: DMAI

Bed Taxes Reinvested in DMOs

- On a national level, cities reinvest between 57 and 59 percent of bed taxes for DMO organizational uses
- For counties who have a bed tax, between 63 and 64 percent are reinvested in DMOs

Reinvestment of Bed Taxes by DMO Budget

	\$1 -2 million	\$2-5 million
City	59%	57%
County	63%	64%

Source: DMAI – Organizational & Financial Study

Critical Issues Delivery Systems

1. Deeper integration and collaboration between DMO's
2. Refine DCVB funding structures
3. DCVB engage better with communities – demonstrate roles and impact
4. New branding to capture full DuPage experience



GPS- A Tourism
Roadmap

Competition

Rosemont

- Ability to tell a more concentrated story
- Airport proximity with shopping, dining, attractions and lodging
- Incentives to lure group business



City of Chicago

- Moderation of hotel pricing
- Incentives to lure group business
- New “Tourist Igniters”
 - The Skyline – Aerial Glass Gondolas
 - Cermak Road entertainment district
 - Park – Skyscraper light shows
 - Performer river barges – symphony, opera, etc.

The logo for the Chicago Tribune, featuring the words "Chicago Tribune" in a white, serif font on a dark blue rectangular background.

Editorial: From the Ferris wheel to 'The Skyline': How would you ignite Chicago tourism?

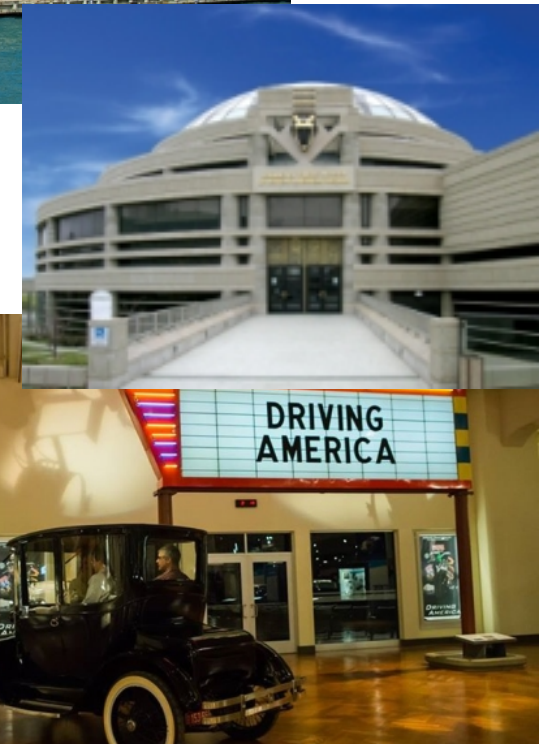
Indianapolis

- Travel & Leisure – America's Favorite Cities Indianapolis #17
- World's largest Children's Museum – new \$8 million exhibit "Beyond Spaceship Earth"
- New "Cultural Trail" opened in 2013, \$63 million (\$20 million DOT) –many awards



Detroit

- \$279 million renovation to Cobo Center
- Unique meeting venues
 - The Henry Ford
 - The Fox Theater
 - Charles Wright Museum African American History
 - Ford Rouge Factory Tour



Critical Issues Competition

1. Be aware of competitive reality in the industry and in political arena
2. Use competitors' innovations to push new initiatives in DuPage



GPS- A Tourism
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Next Steps

Key Themes

1. The group market is of key importance
2. Must broaden who and how we connect
3. Increased focus on integrated product offerings is crucial
4. We need to cooperate internally, and compete externally, to maximize the DuPage visitor industry.

Tourism Roadmap - SOI

1. Refine SOI critical issues
2. Developing strategies and tactics to act on critical issues
3. Roadmap complete in 2017

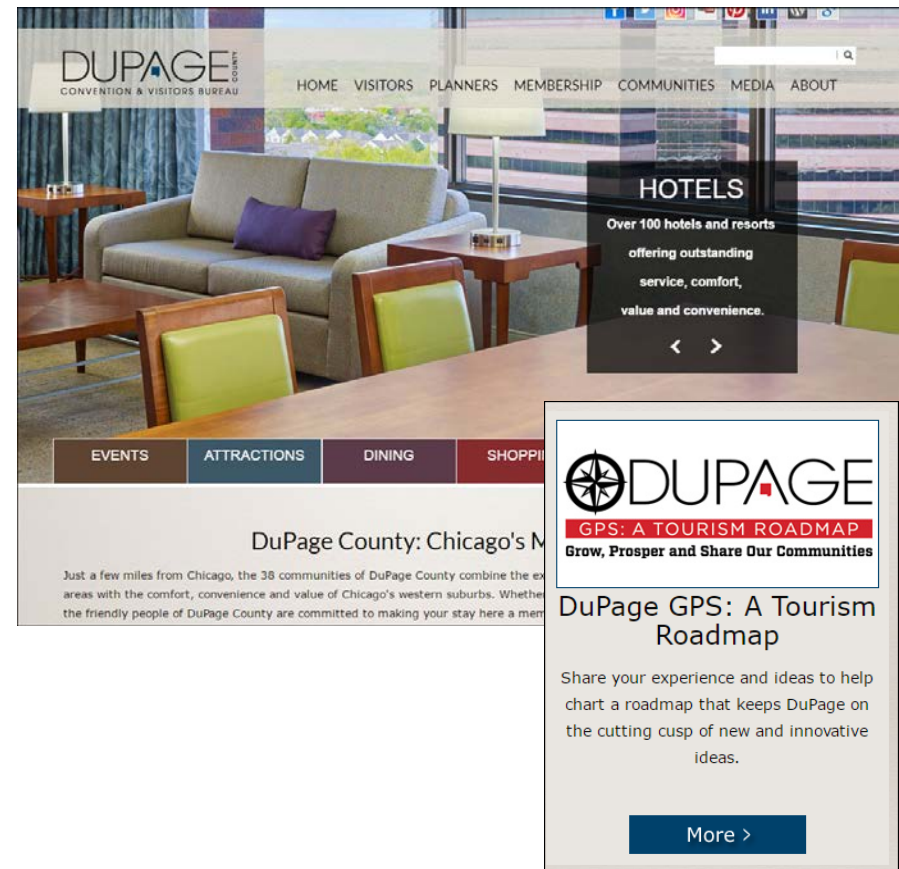


Feedback



Ongoing Connection

- discoverdupage.com – click on box
- discoverdupage.com/gps
- Provide additional feedback



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