

# DESTINATION NEXT

**Multi-User Diagnostic Assessment**  
Hamilton County, IN  
Jul 25, 2022

 NextFactor

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# DestinationNEXT Scenario Model



# Destination Strength Variables



**Attractions & Experiences**



**Arts, Culture & Heritage**



**Dining, Shopping & Entertainment**



**Outdoor Recreation**



**Conventions & Meetings**



**Events & Festivals**



**Sporting Events**



**Accommodation**



**Local Mobility & Access**



**Destination Access**



**Communication Infrastructure**



**Health & Safety**

# Destination Alignment Variables



**Business Support**



**Community Group & Resident Support**



**Government Support**



**Organization Governance**



**Workforce Development**



**Hospitality Culture**



**Equity, Diversity & Inclusion**



**Funding Support & Certainty**



**Regional Cooperation**



**Sustainability & Resilience**



**Emergency Preparedness**



**Economic Development**

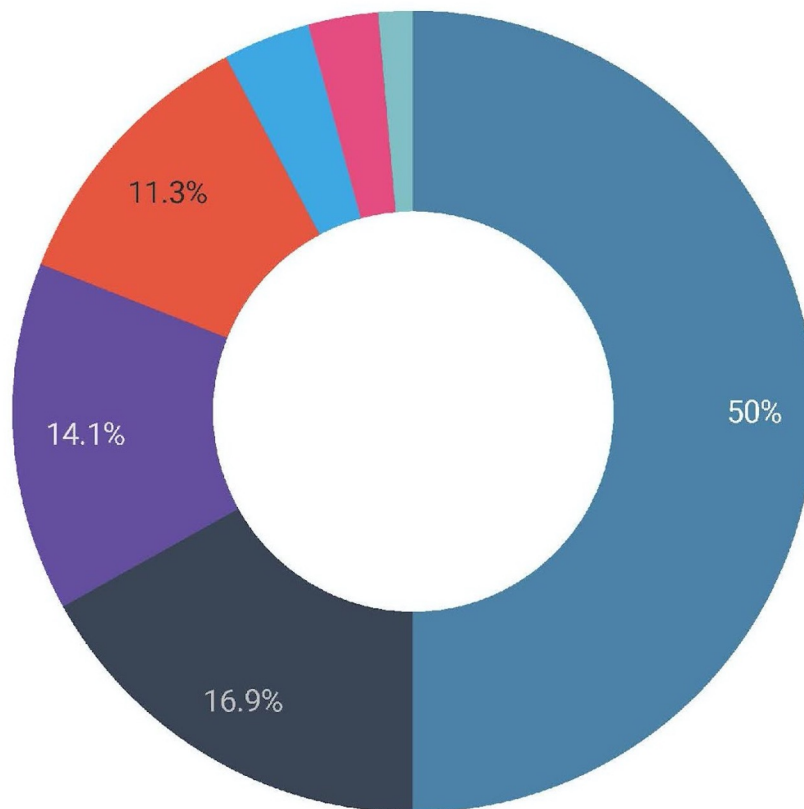


# Stakeholders



## Stakeholder Groups

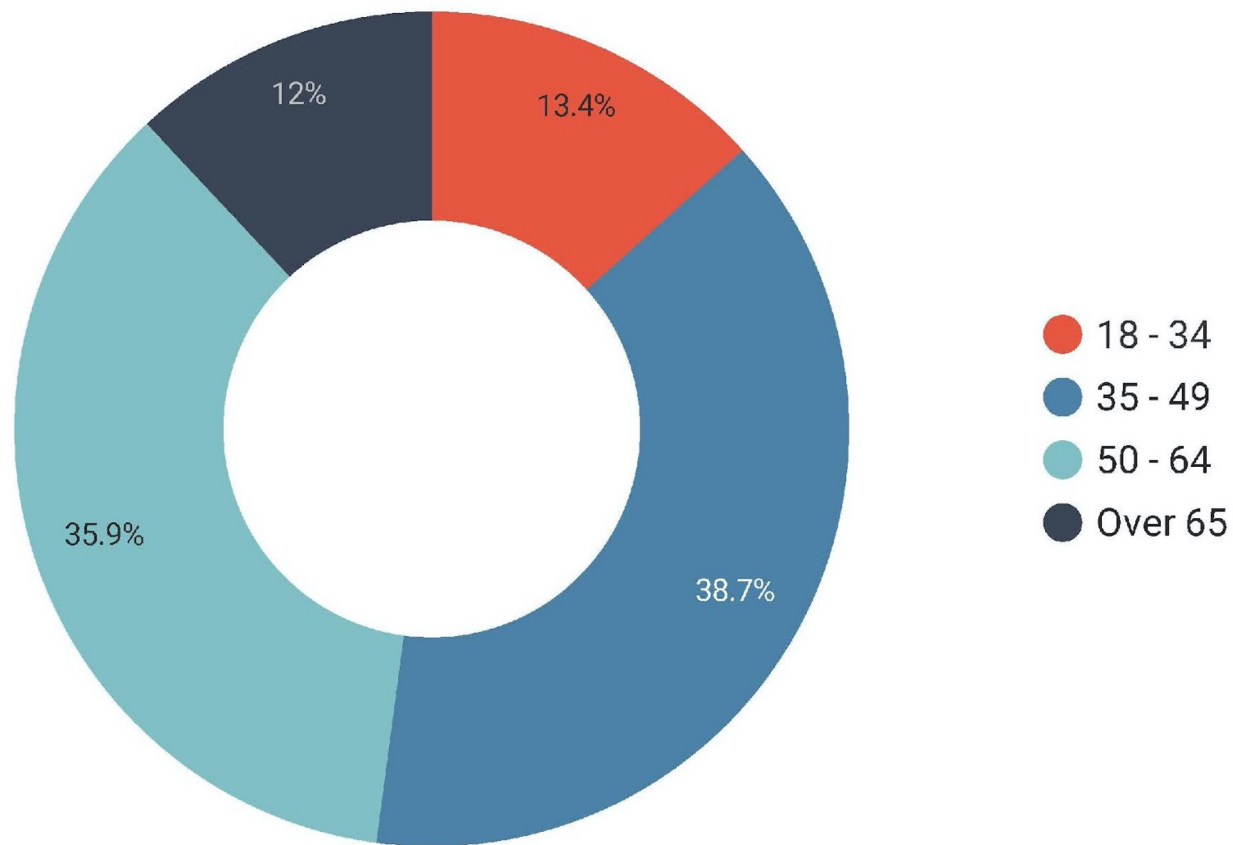
Total Respondents  
**142**



- HCT Industry Partners
- Community Leaders
- Hamilton County Tourism Team
- Government Leaders
- Hamilton County Tourism Board of Directors
- Hamilton County Tourism Commission
- Customers

## Age

Total Respondents  
**142**



# Overall Assessment

Voyagers

Trailblazers



Explorers

Mountaineers

# Destination Strength

Variable	Relative Importance (0-100%)		Perceived Performance (1 - 5 scale)	
	Industry	Destination	Industry	Destination
Dining, Shopping & Entertainment	8.60%	8.71%	3.61	4.07
Accommodation	8.74%	8.71%	3.66	3.84
Sporting Events	8.03%	8.58%	3.49	3.82
Attractions & Experiences	8.97%	8.57%	3.72	4.07
Arts, Culture & Heritage	8.28%	8.43%	3.72	4.24
Events & Festivals	8.29%	8.33%	3.73	4.04
Health & Safety	8.28%	8.30%	3.31	4.36
Communication Infrastructure	8.34%	8.30%	3.24	3.69
Local Mobility & Access	8.23%	8.19%	3.06	3.03
Outdoor Recreation	8.59%	8.18%	3.98	4.08
Conventions & Meetings	8.00%	7.93%	3.42	3.79
Destination Access	8.07%	7.79%	3.33	3.29

Green indicates destination performance +5% above industry average; red indicates -5% below.

	Industry Average	Destination
Destination Strength	3.52	3.80

Scenario: Trailblazers

## Destination Strength: Highest & Lowest Variable Scores

### Highest-scored Variables

	Variable	Performance ▾
1.	Health & Safety	4.36
2.	Arts, Culture & Heritage	4.24
3.	Outdoor Recreation	4.08
4.	Dining, Shopping & Entertainment	4.07
5.	Attractions & Experiences	4.07

### Lowest-scored Variables

	Variable	Performance ▴
1.	Local Mobility & Access	3.03
2.	Destination Access	3.29
3.	Communication Infrastructure	3.69
4.	Conventions & Meetings	3.79
5.	Sporting Events	3.82

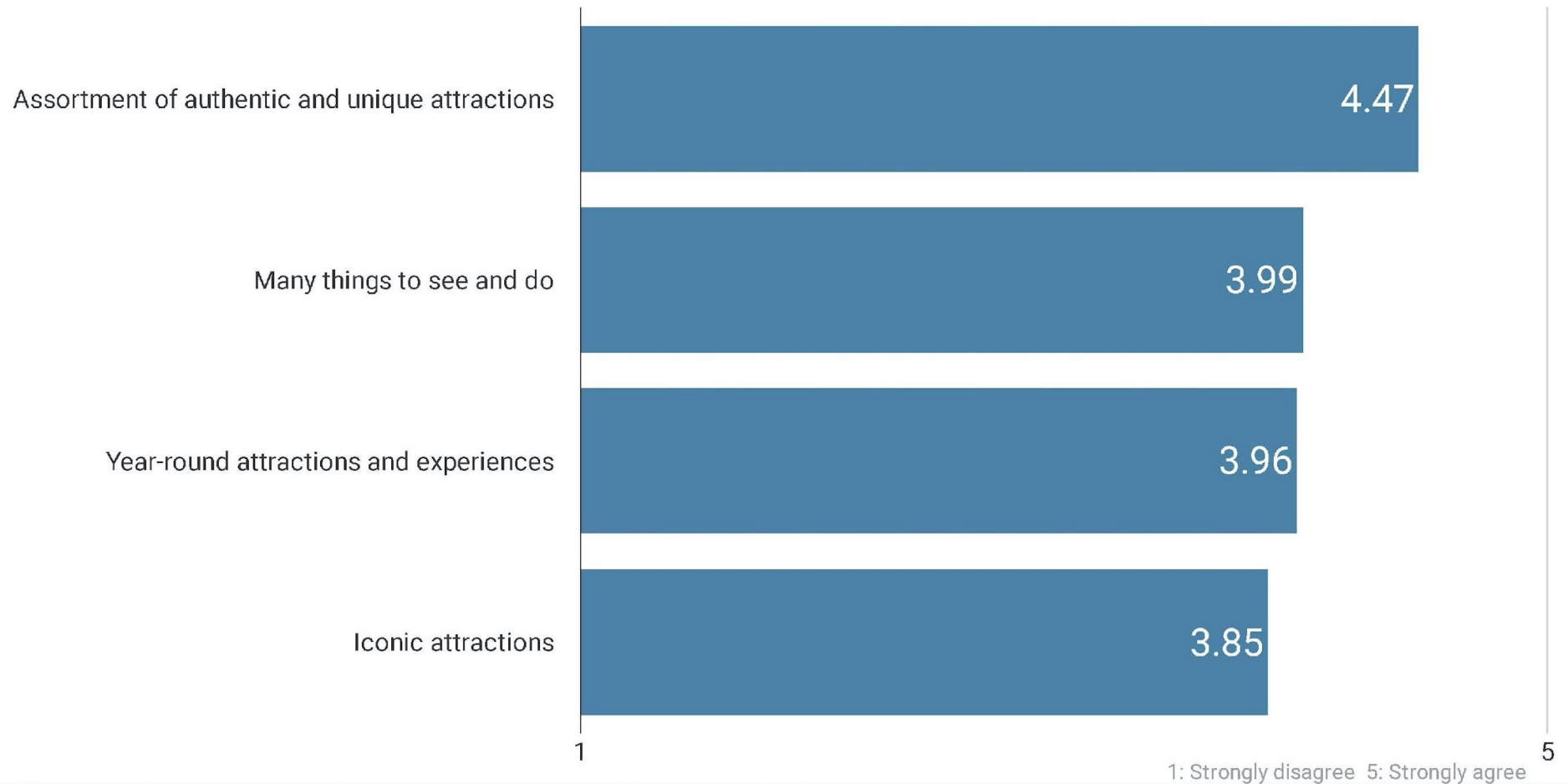
### Highest-rising Variables

	Variable	Change ▾
1.	Communication Infrastructure	1.99
2.	Conventions & Meetings	1.87
3.	Accommodation	1.77
4.	Destination Access	1.68
5.	Attractions & Experiences	1.25

### Lowest-falling Variables

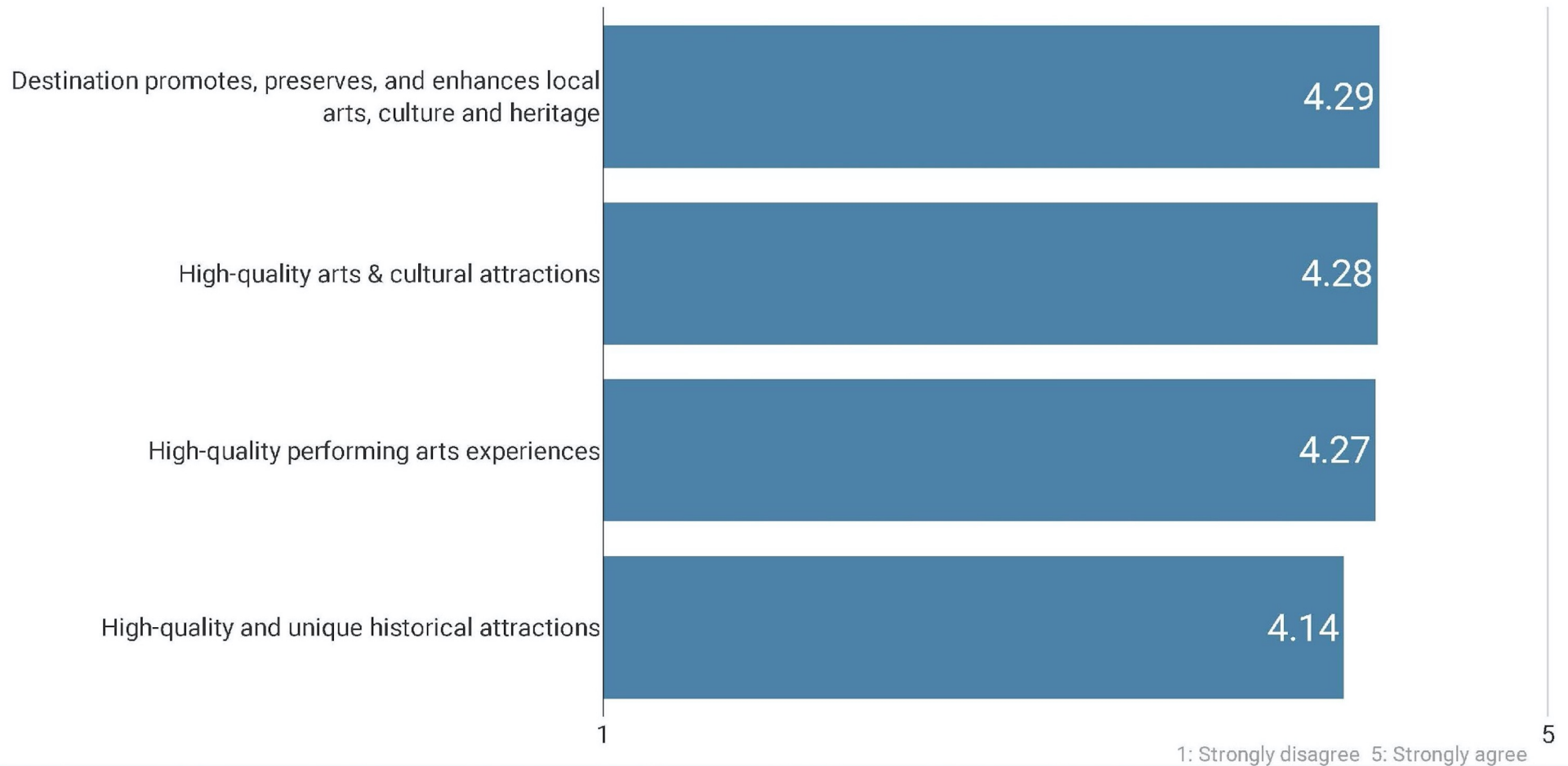
	Variable	Change ▴
1.	Local Mobility & Access	0.60
2.	Sporting Events	0.84
3.	Events & Festivals	1.18
4.	Attractions & Experiences	1.25
5.	Destination Access	1.68

## Attractions & Experiences



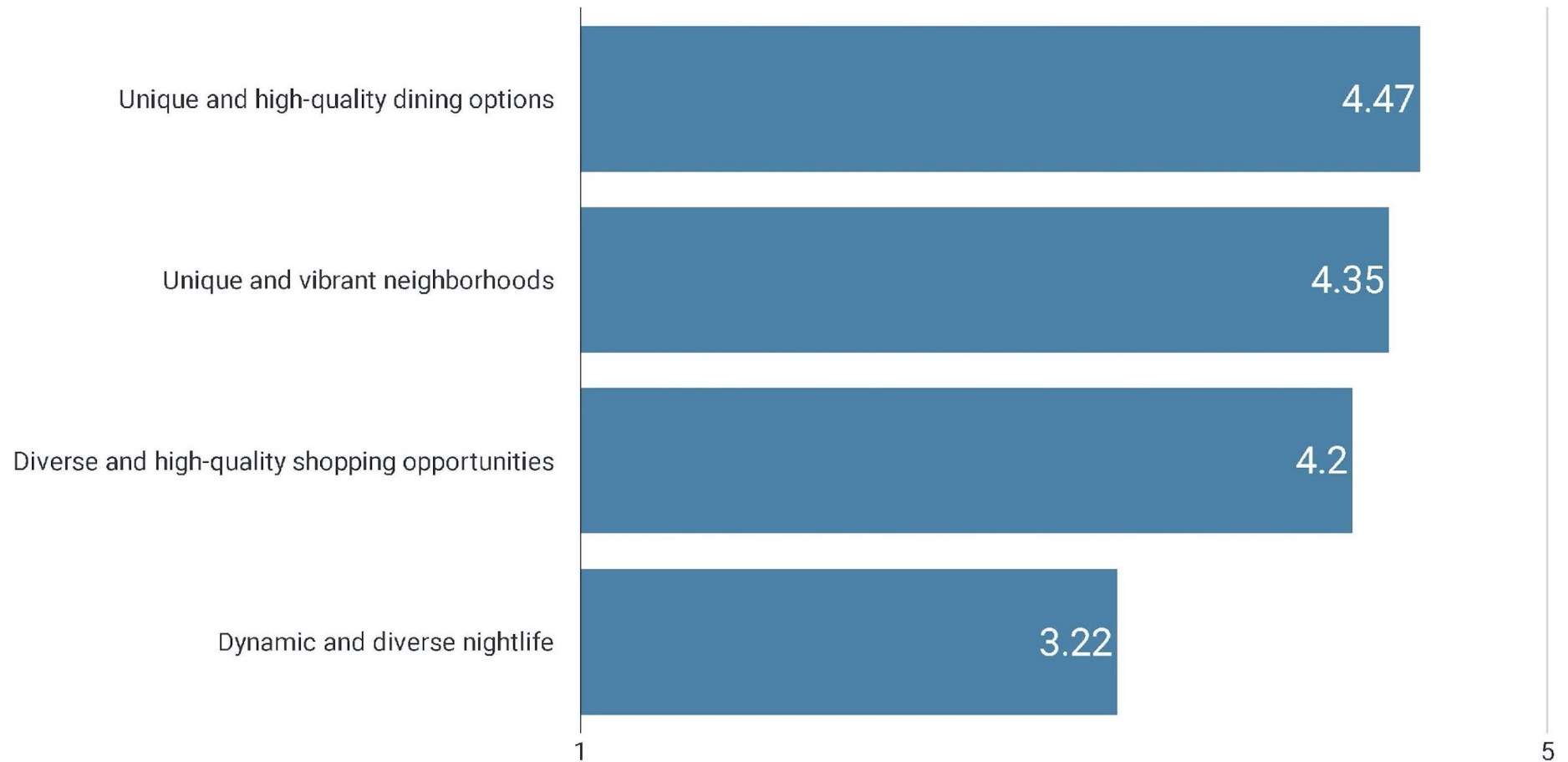


## Arts, Culture & Heritage

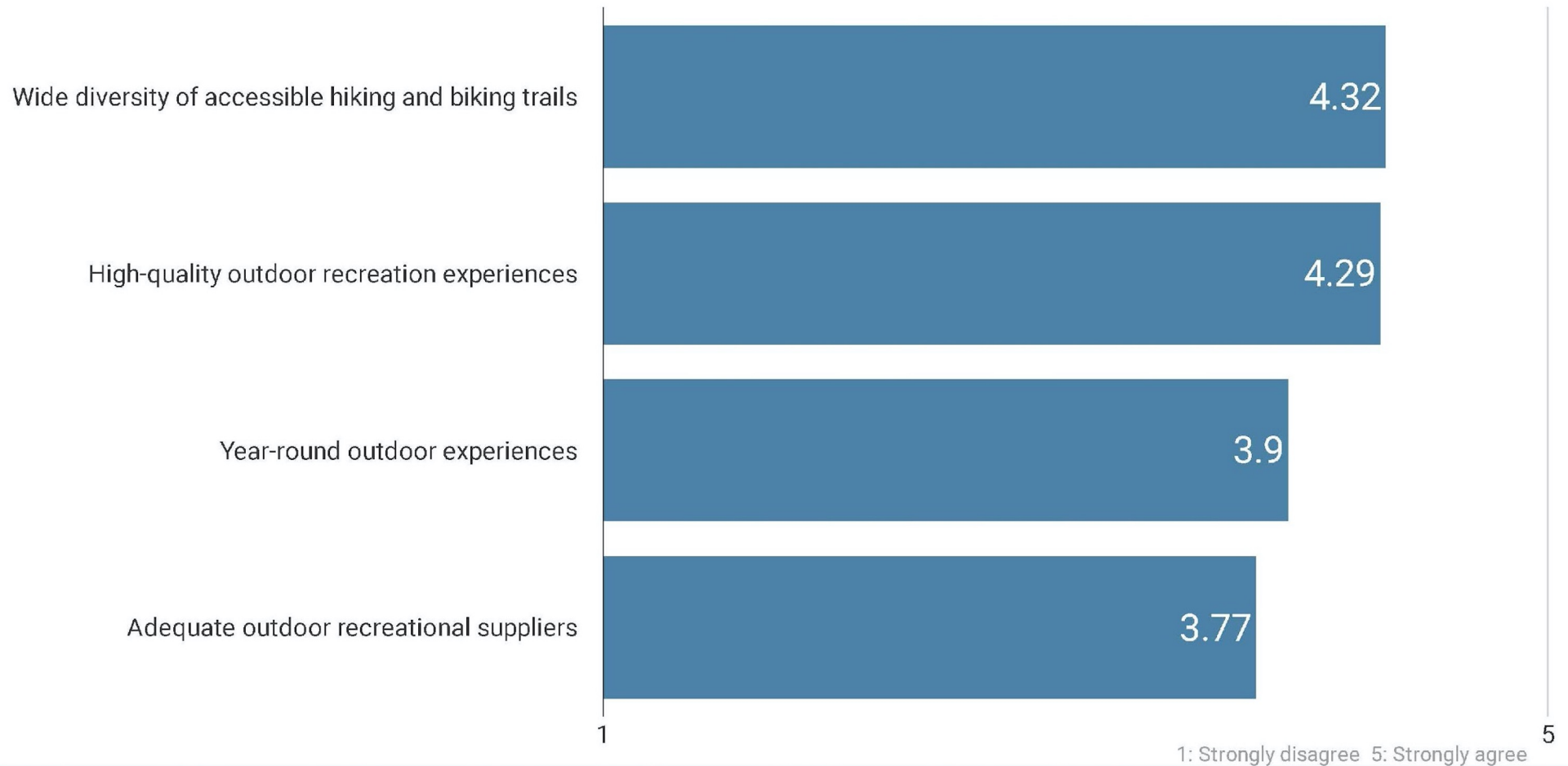




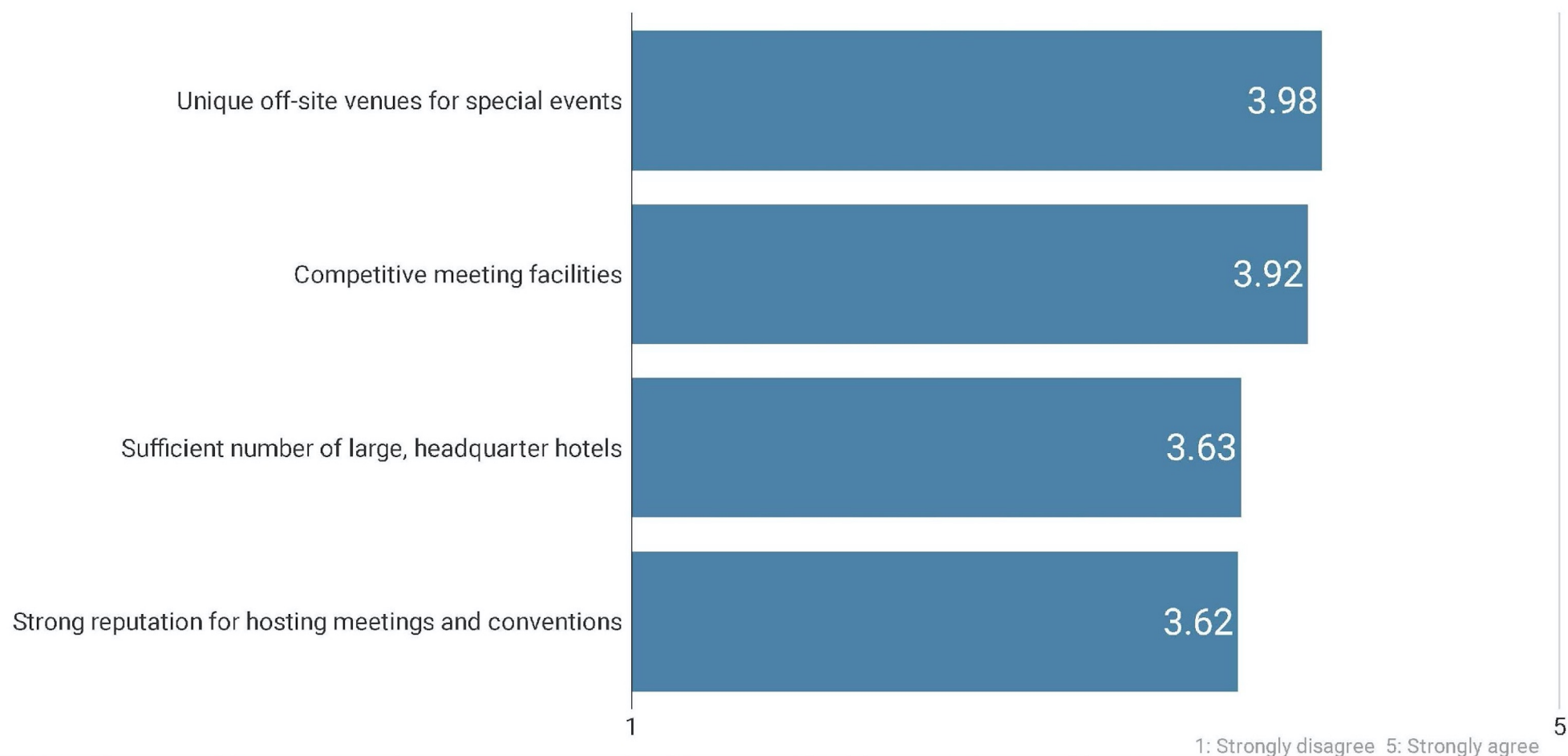
## Dining, Shopping & Entertainment



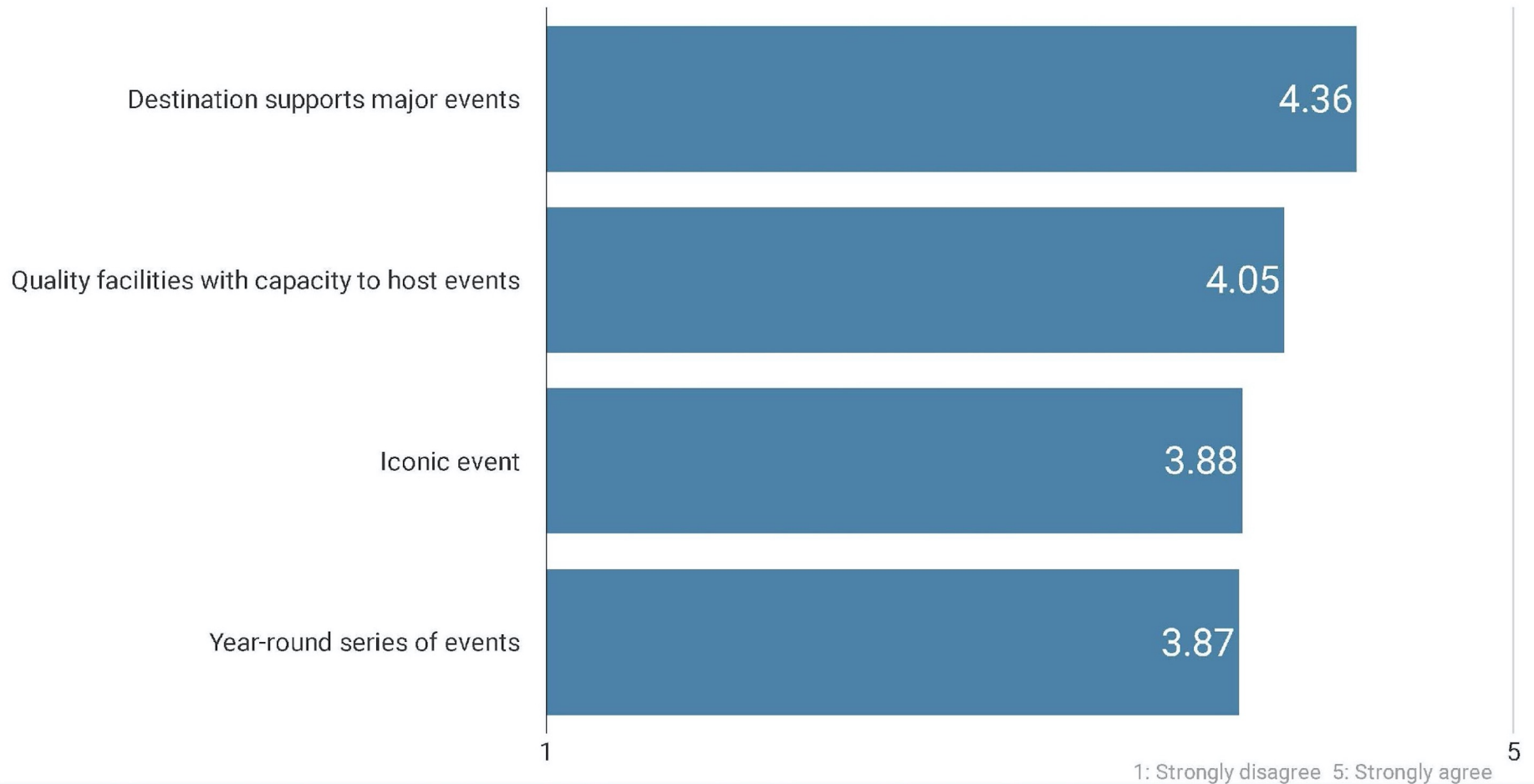
## Outdoor Recreation



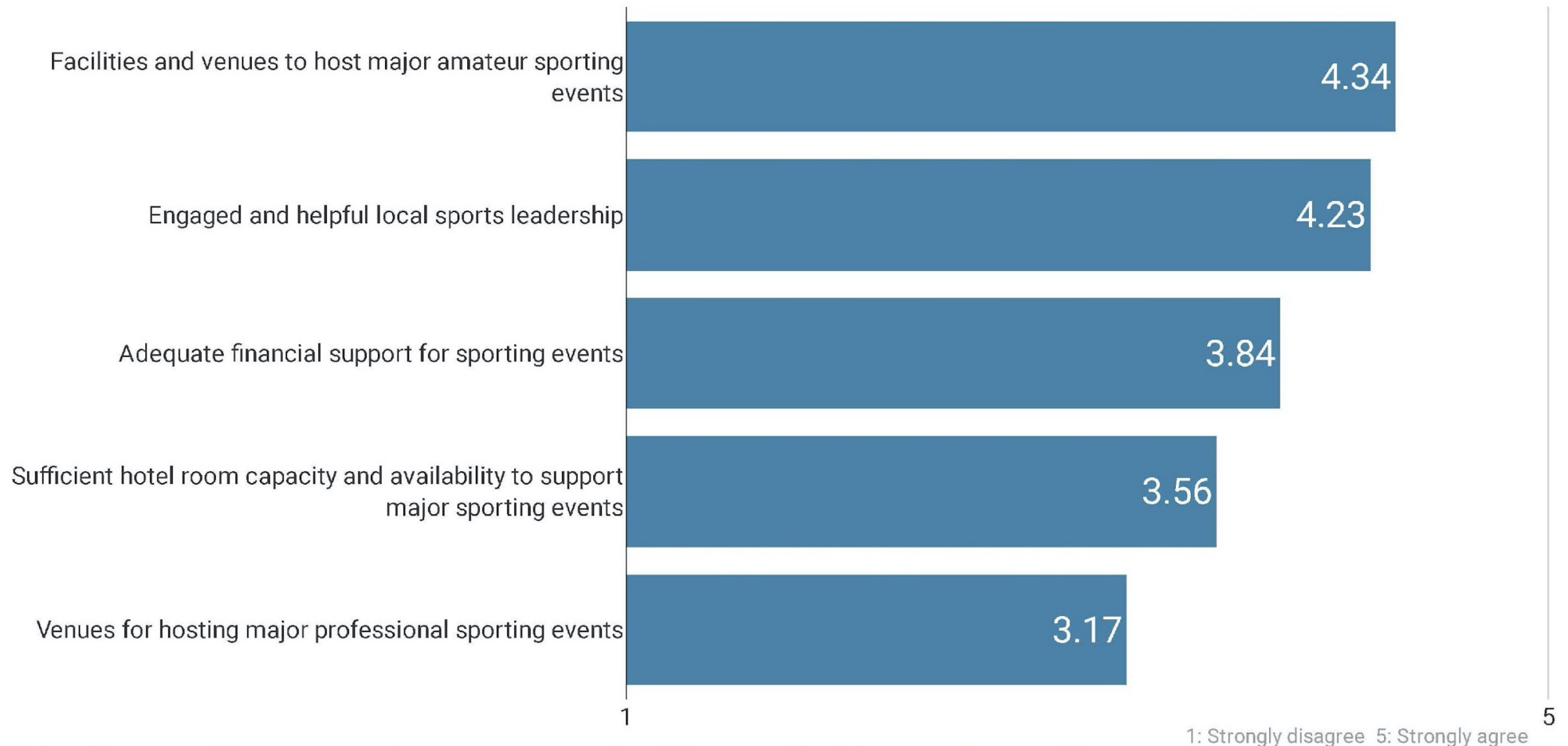
## Conventions & Meetings



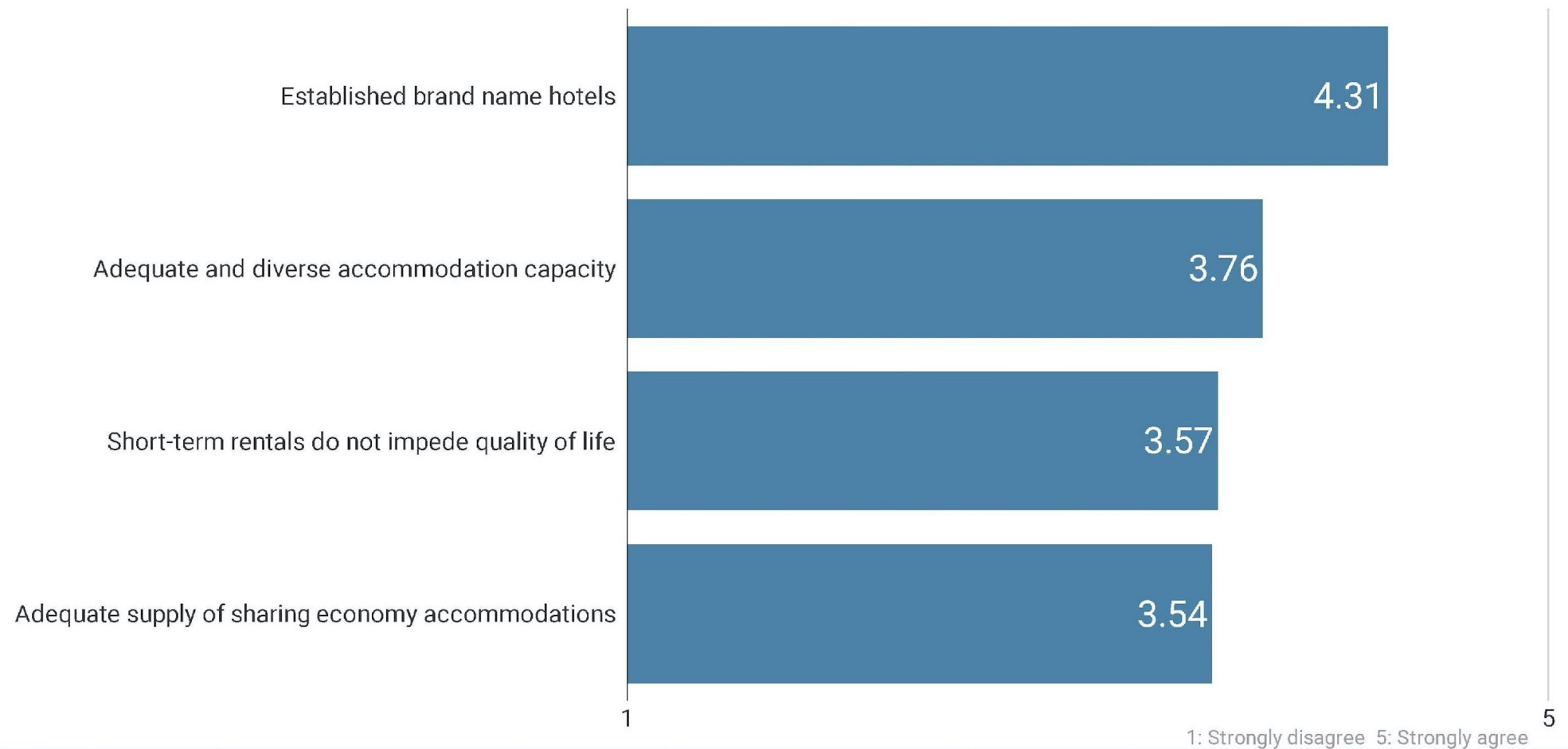
## Events & Festivals



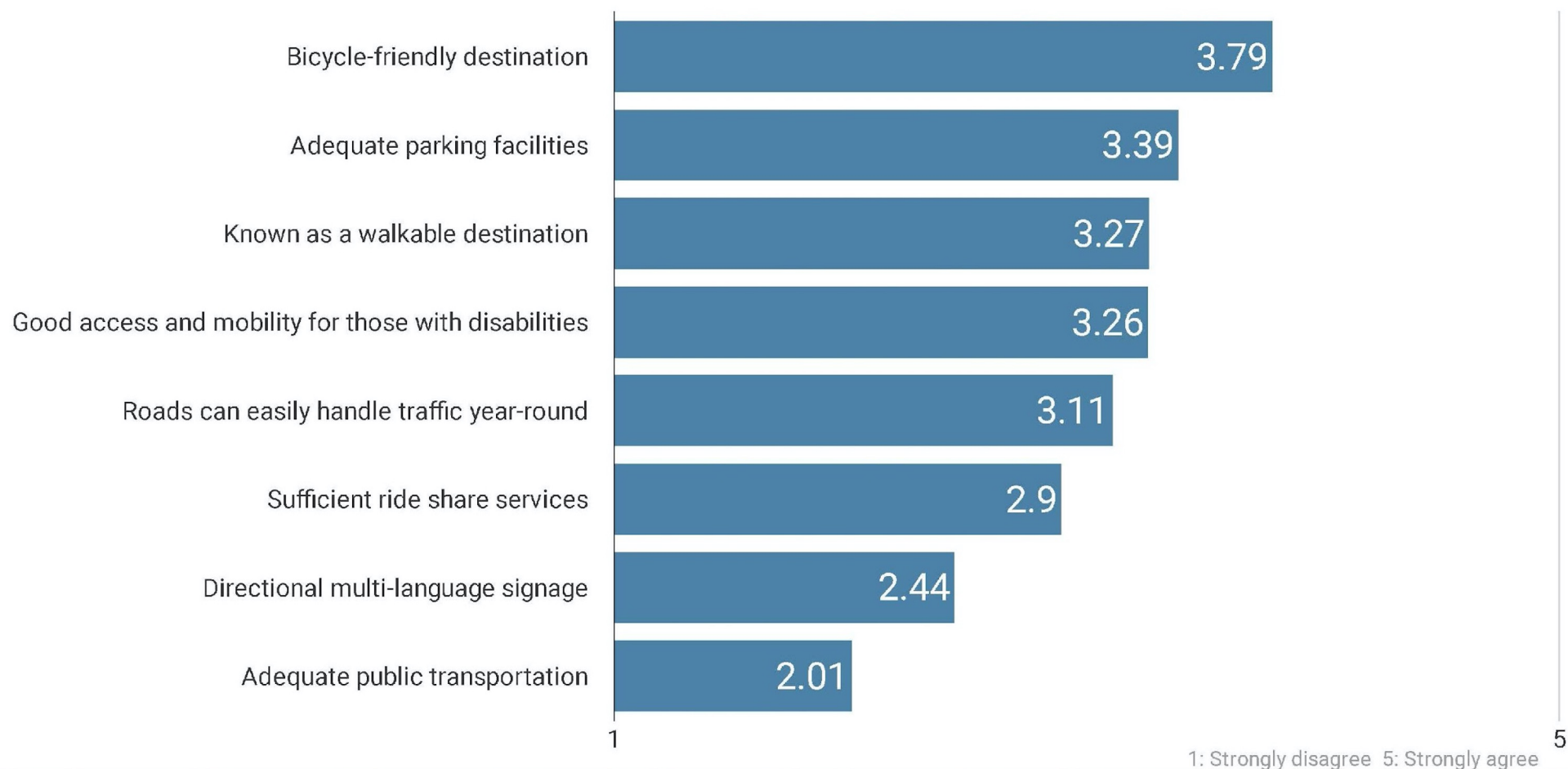
## Sporting Events



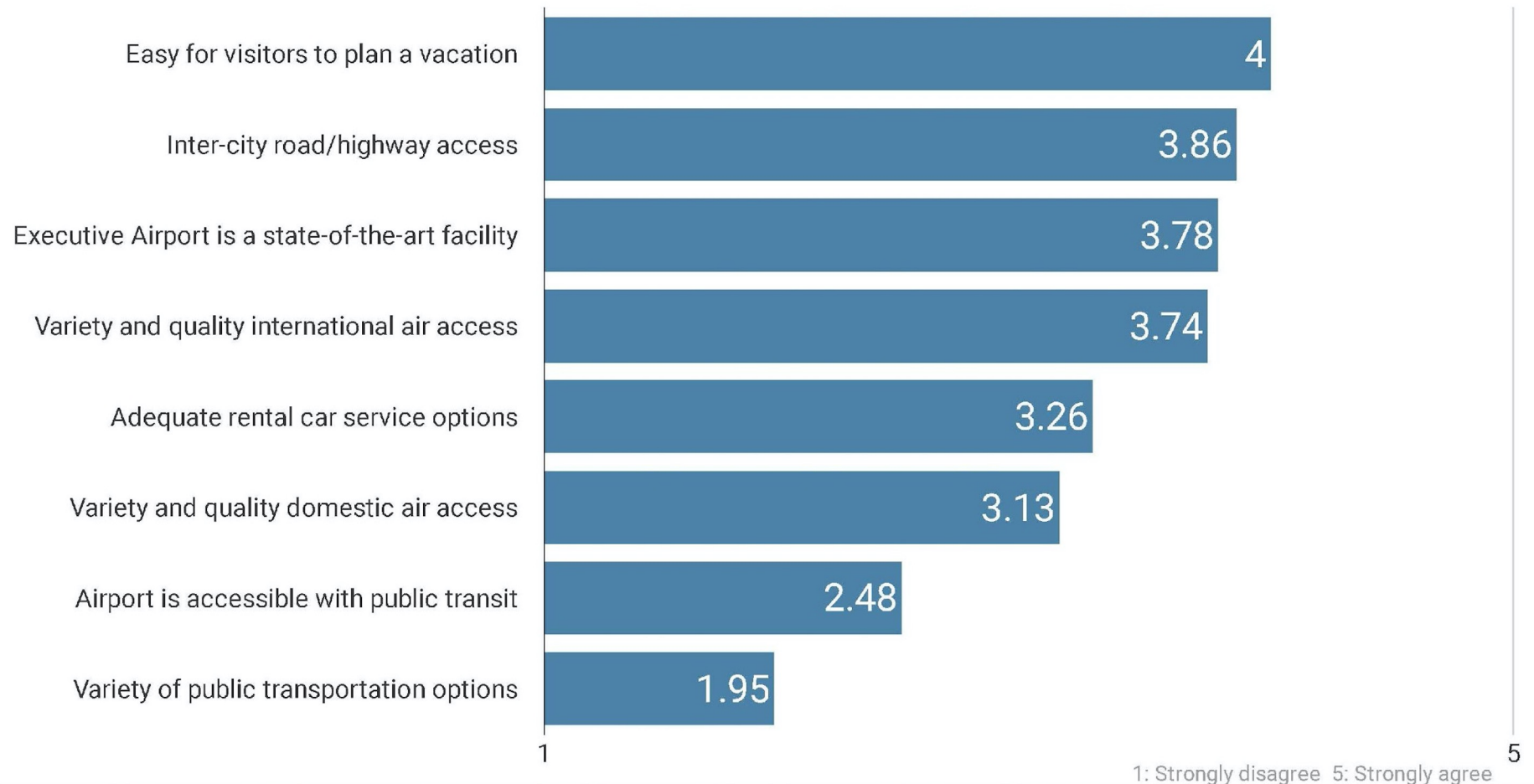
## Accommodation



## Local Mobility & Access

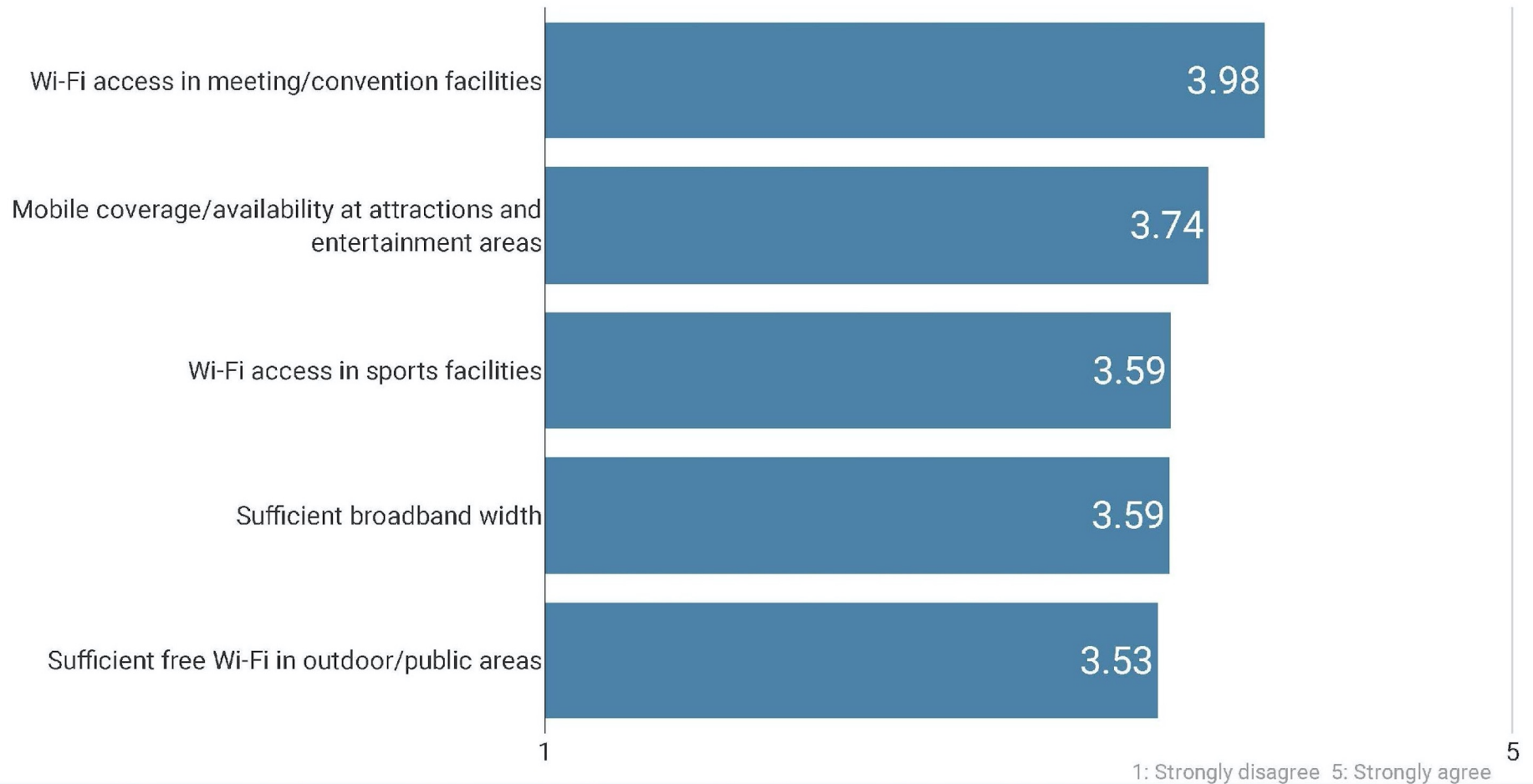


## Destination Access

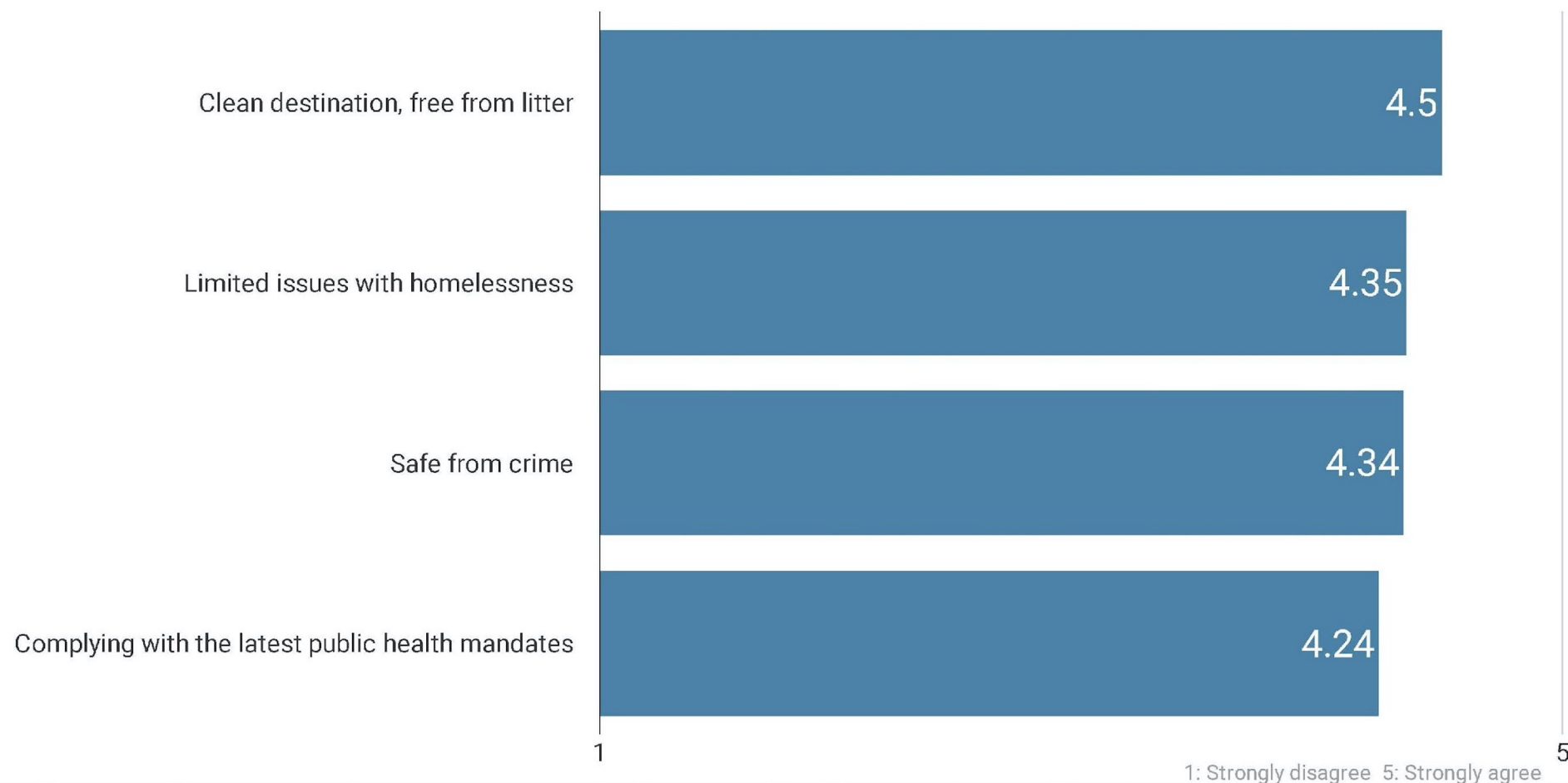




## Communication Infrastructure



## Health & Safety



# Destination Alignment

Variable	Relative Importance (0-100%)		Perceived Performance (1 - 5 scale)	
	Industry	Destination	Industry	Destination
Funding Support & Certainty	8.51%	8.77%	3.36	3.85
Business Support	8.47%	8.40%	3.87	4.29
Economic Development	8.36%	8.38%	3.96	4.37
Regional Cooperation	8.27%	8.38%	3.77	4.16
Hospitality Culture	8.42%	8.37%	3.69	4.15
Equity, Diversity & Inclusion	8.25%	8.37%	3.71	3.61
Government Support	8.43%	8.26%	3.67	4.18
Sustainability & Resilience	8.27%	8.25%	3.49	4.02
Organization Governance	8.02%	8.24%	3.78	4.22
Workforce Development	8.42%	8.24%	2.89	2.81
Emergency Preparedness	8.17%	8.21%	3.44	4.18
Community Group & Resident S...	8.32%	8.12%	3.52	4.01
Green indicates destination performance +5% above industry average; red indicates -5% below.			<b>Industry Average</b>	<b>Destination</b>
Destination Alignment			3.55	3.90

Scenario: Trailblazers

## Destination Alignment: Highest & Lowest Variable Scores

### Highest-scored Variables

	Variable	Performance ▾
1.	Economic Development	4.37
2.	Business Support	4.29
3.	Organization Governance	4.22
4.	Emergency Preparedness	4.18
5.	Government Support	4.18

### Lowest-scored Variables

	Variable	Performance ▲
1.	Workforce Development	2.81
2.	Equity, Diversity & Inclusion	3.61
3.	Funding Support & Certainty	3.85
4.	Community Group & Resident Support	4.01
5.	Sustainability & Resilience	4.02

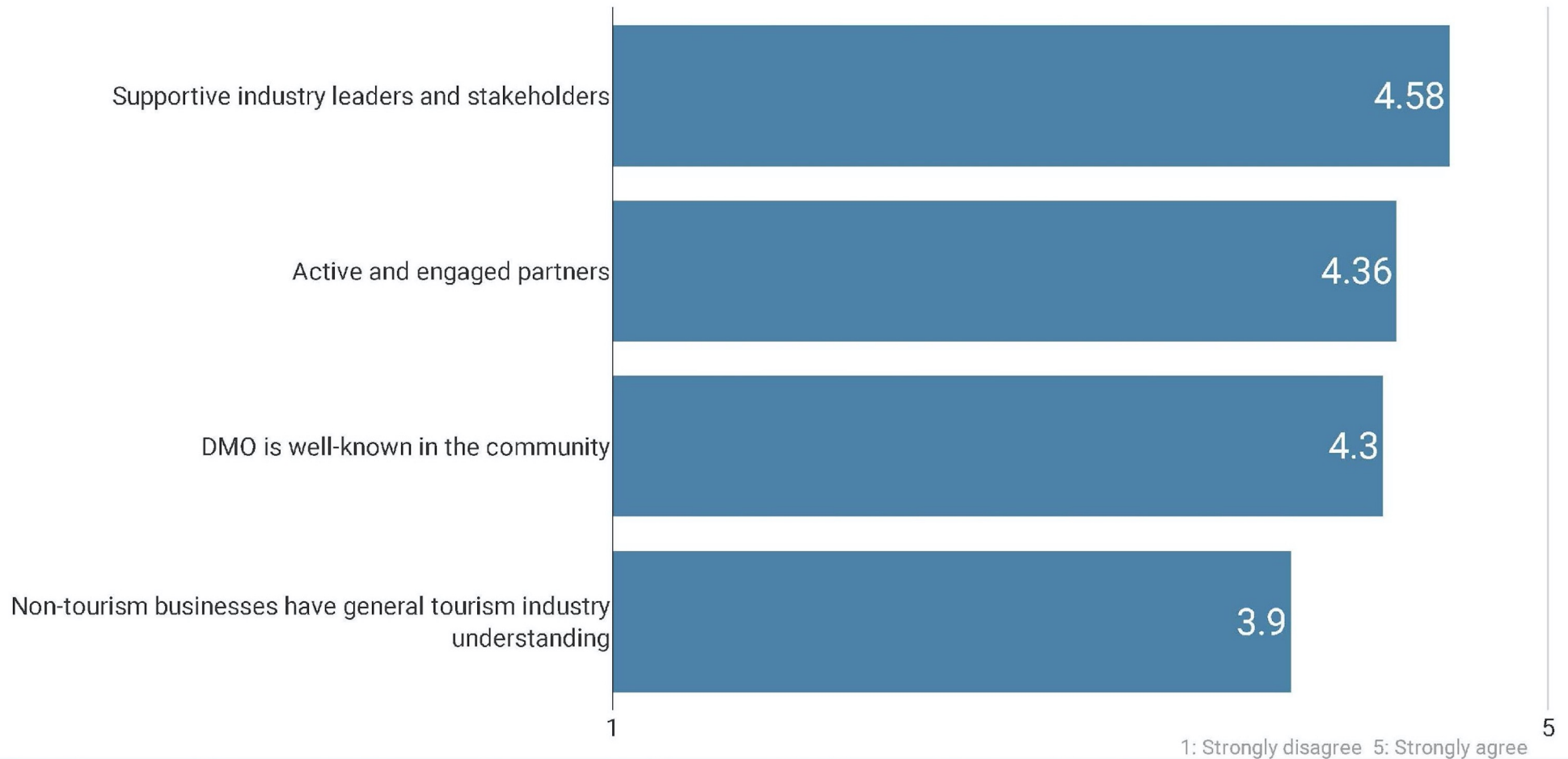
### Highest-rising Variables

	Variable	Change ▾
1.	Hospitality Culture	1.39
2.	Community Group & Resident Support	1.19
3.	Regional Cooperation	1.16
4.	Workforce Development	1.09
5.	Economic Development	1.06

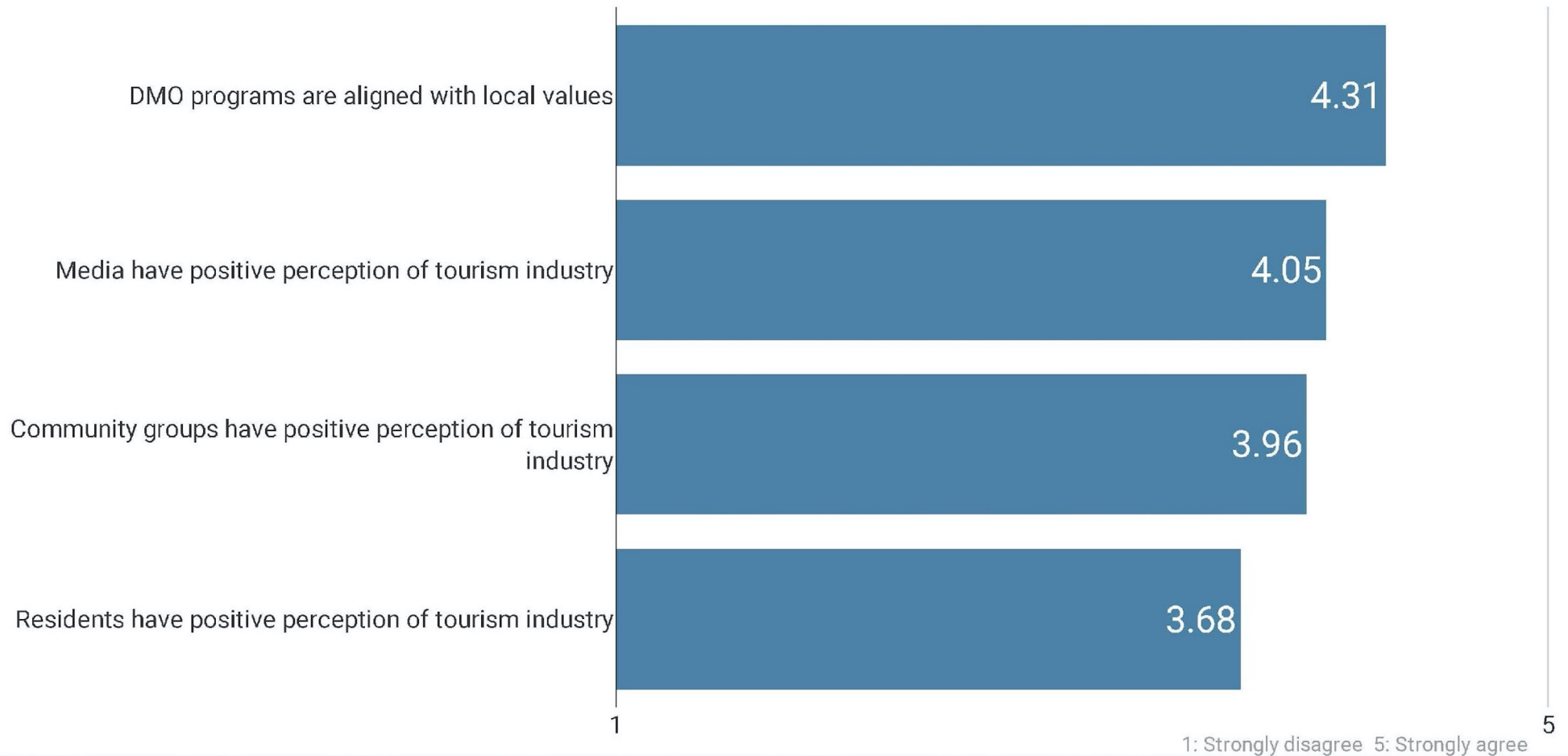
### Lowest-falling Variables

	Variable	Change ▲
1.	Funding Support & Certainty	0.51
2.	Business Support	0.88
3.	Organization Governance	0.89
4.	Government Support	0.97
5.	Economic Development	1.06

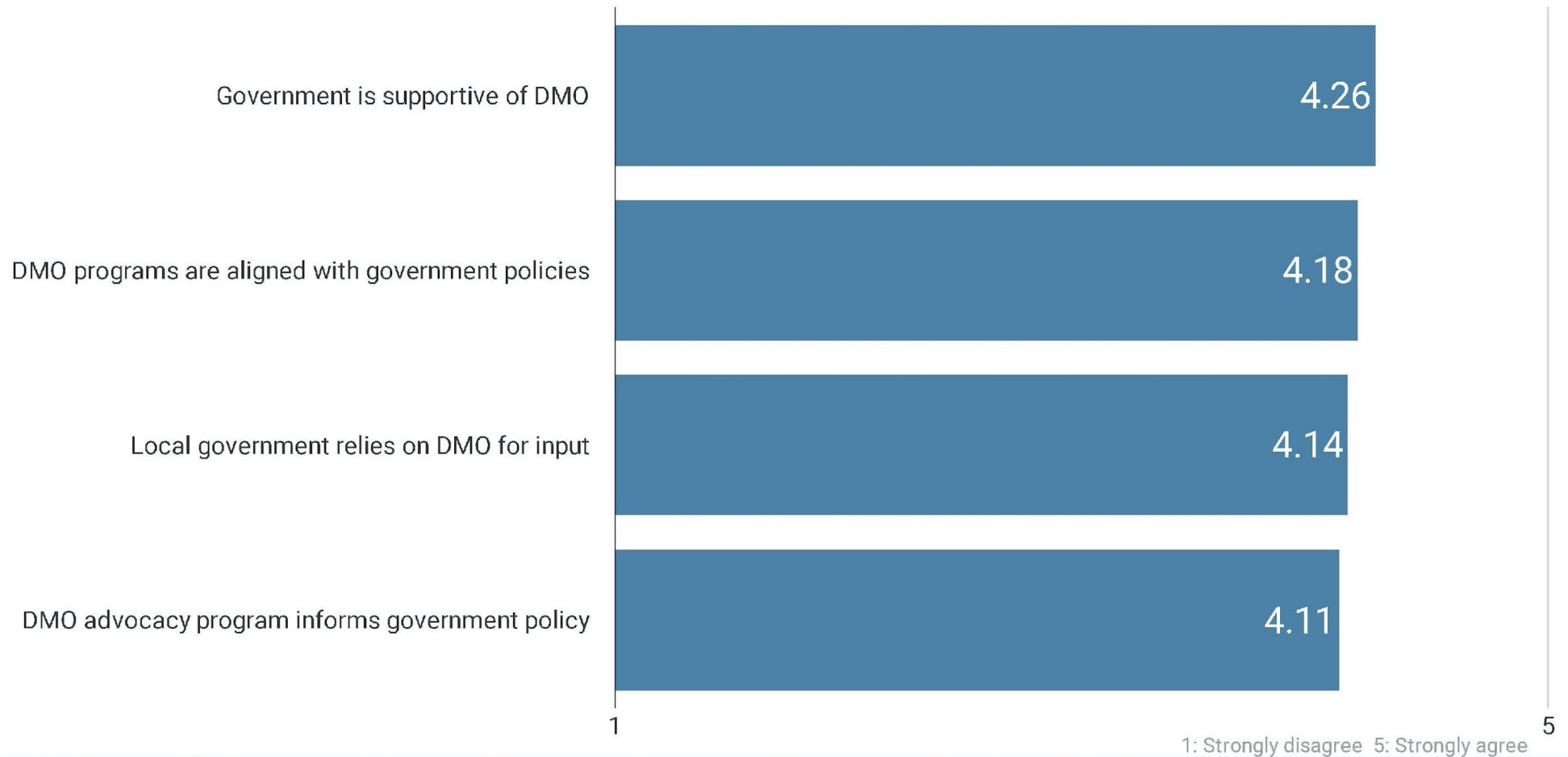
## Business Support



## Community & Resident Support

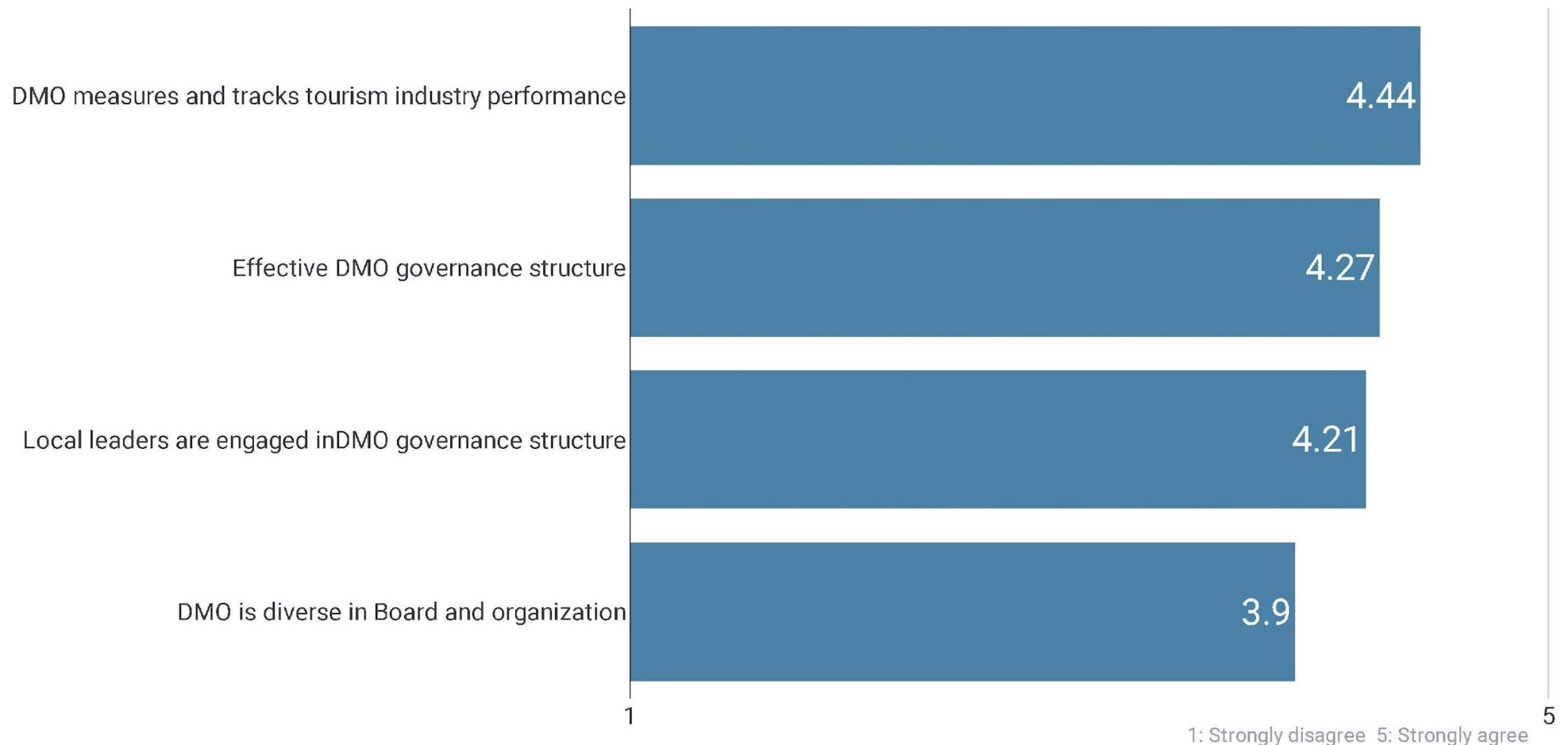


## Government Support



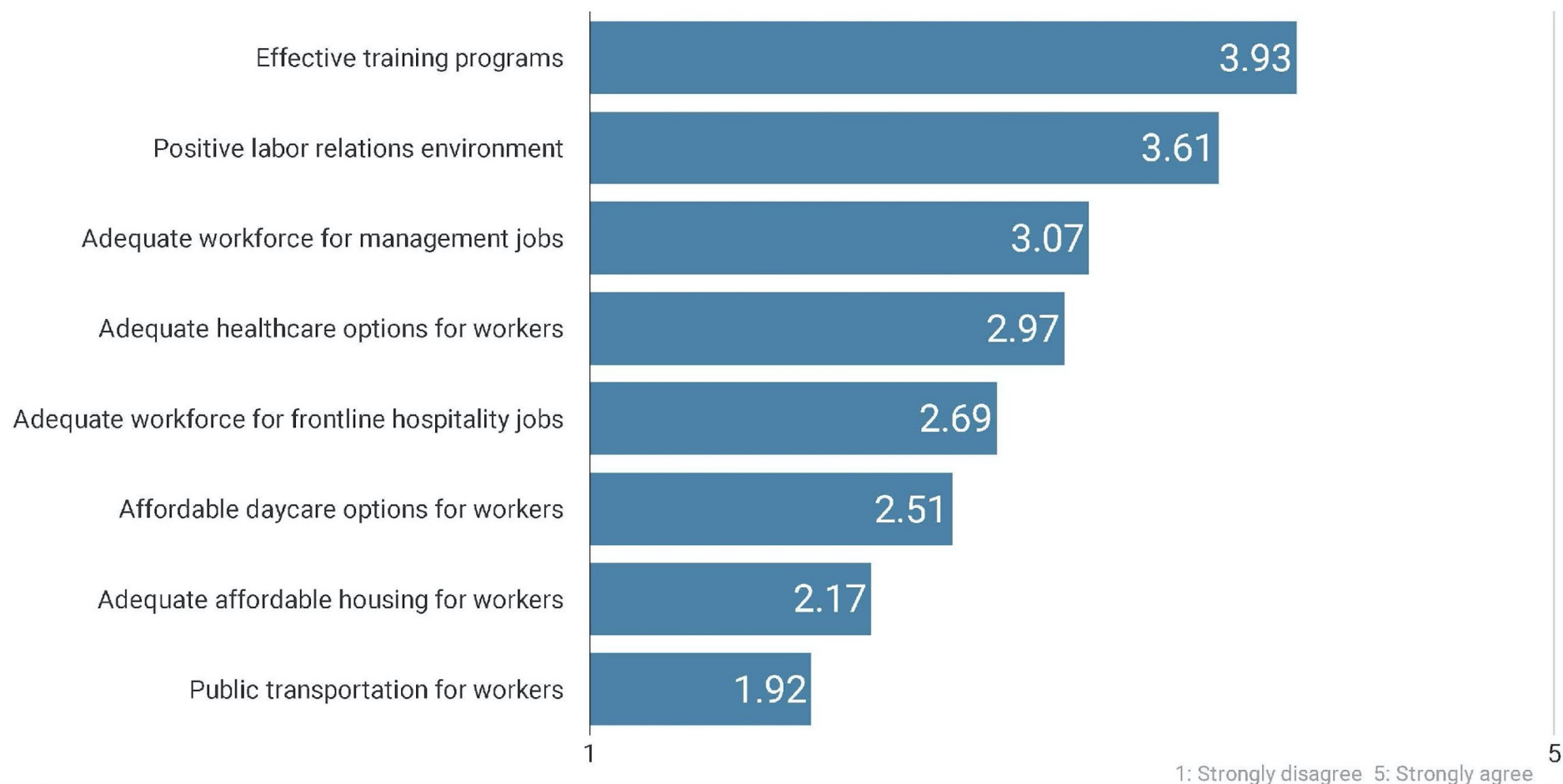


## Organization Governance Model

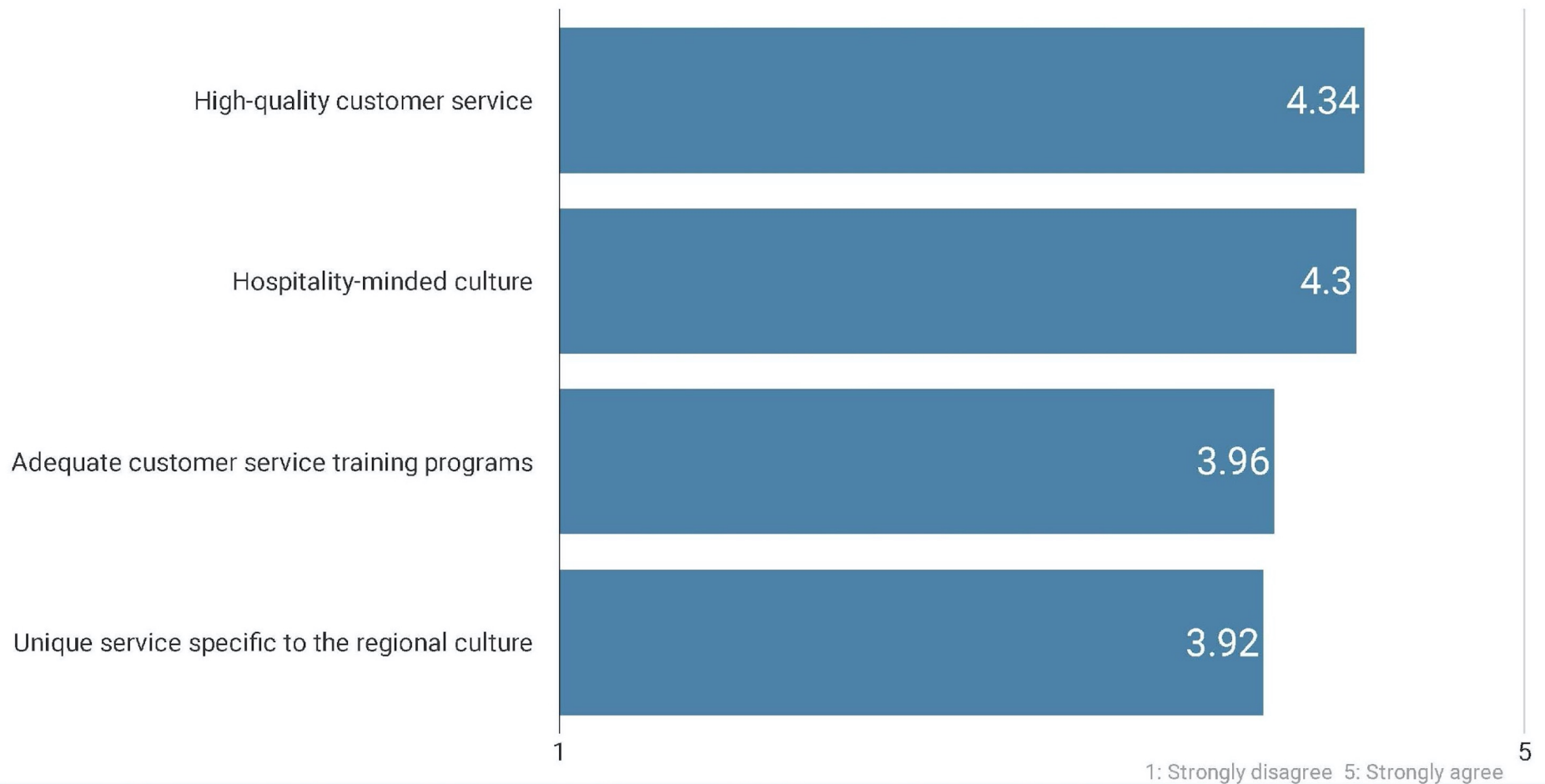




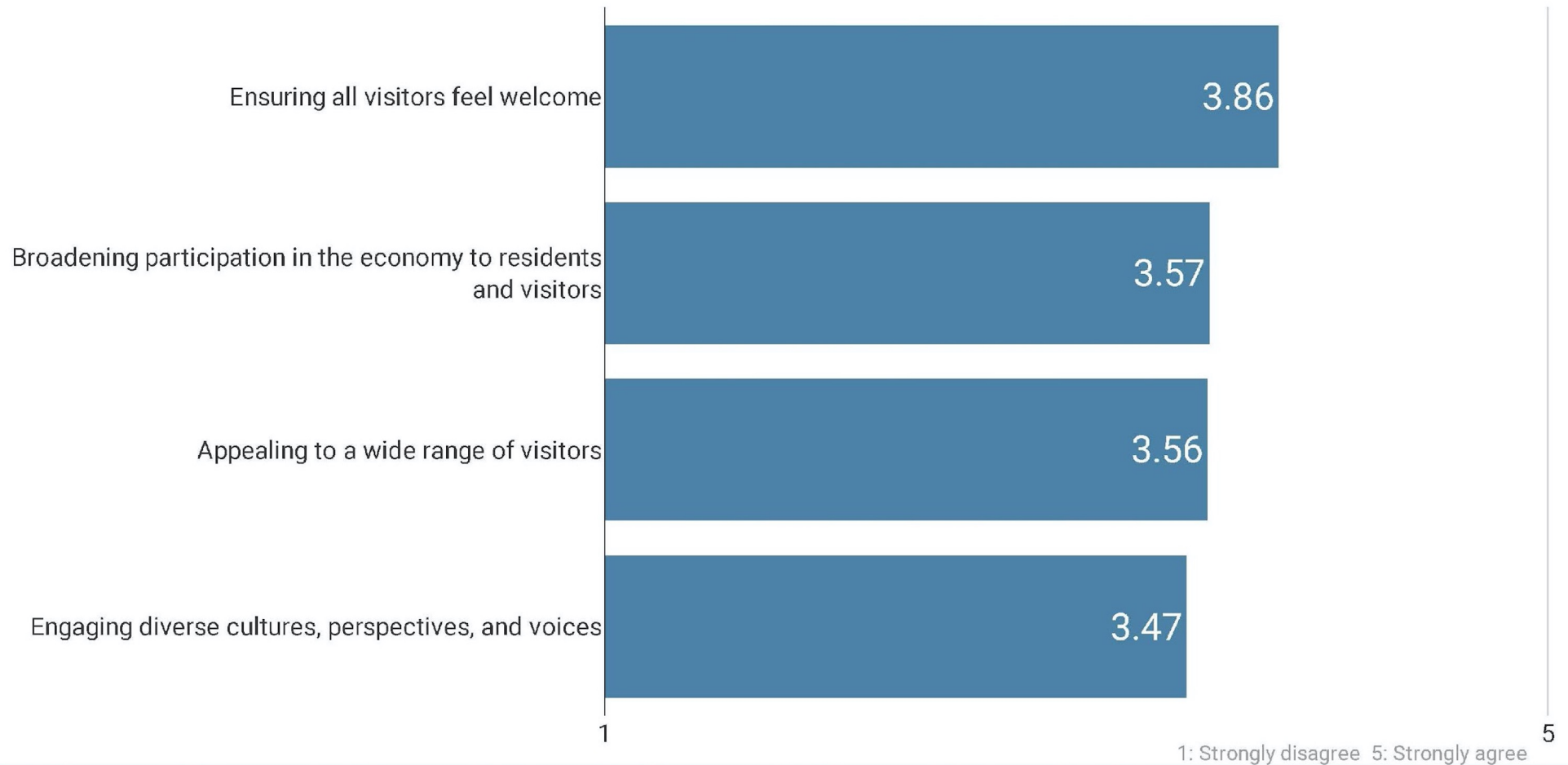
## Workforce Development



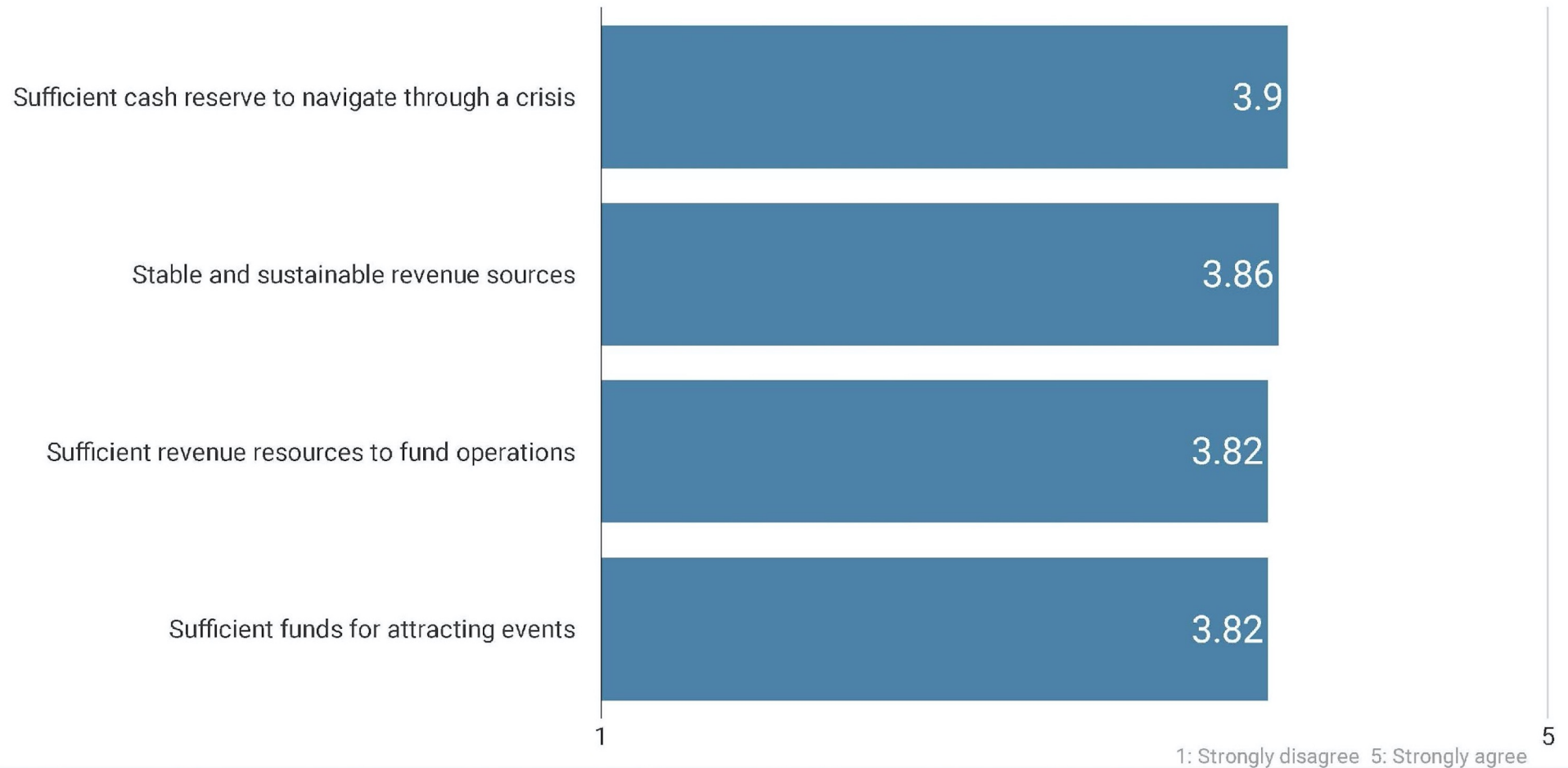
# Hospitality Culture



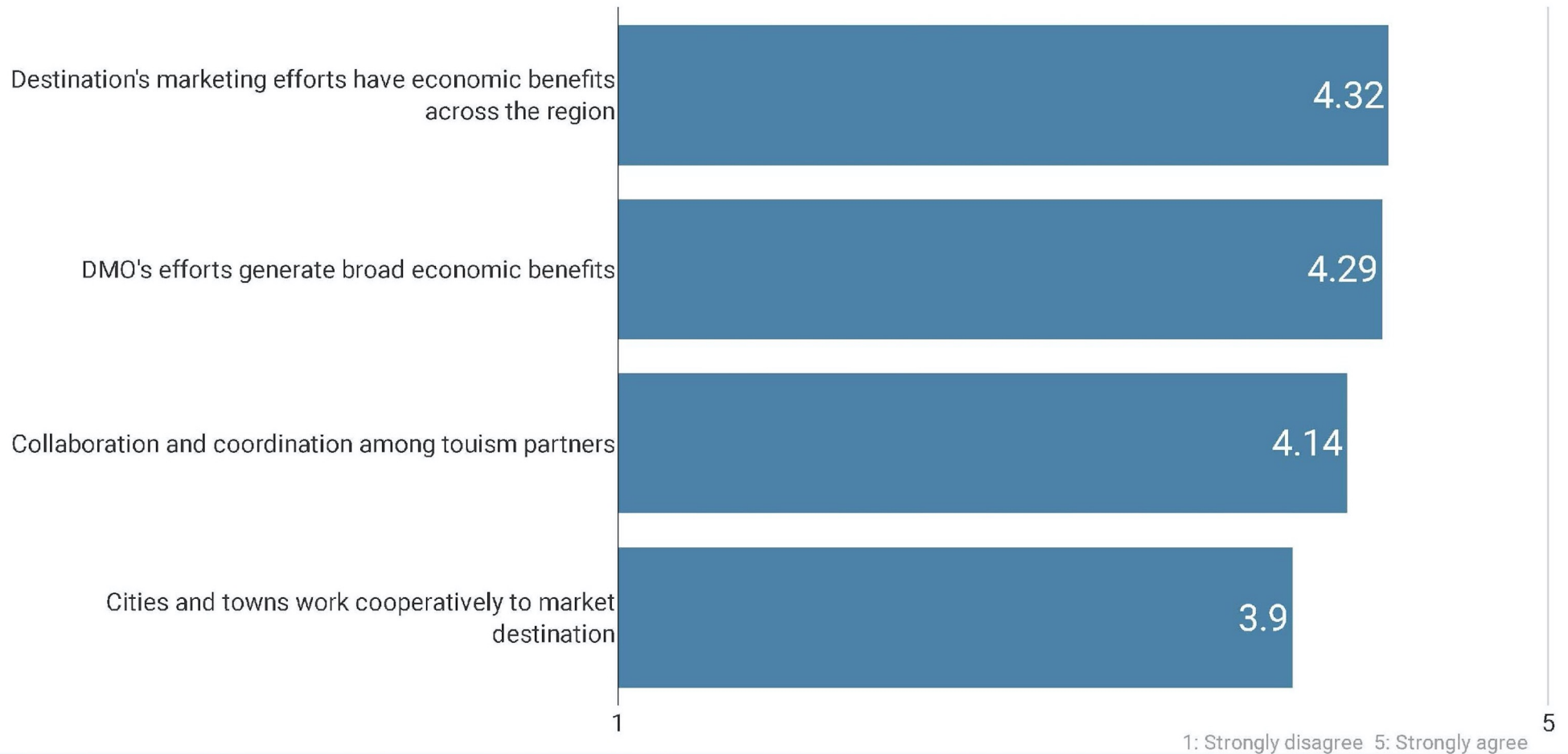
## Equity, Diversity & Inclusion



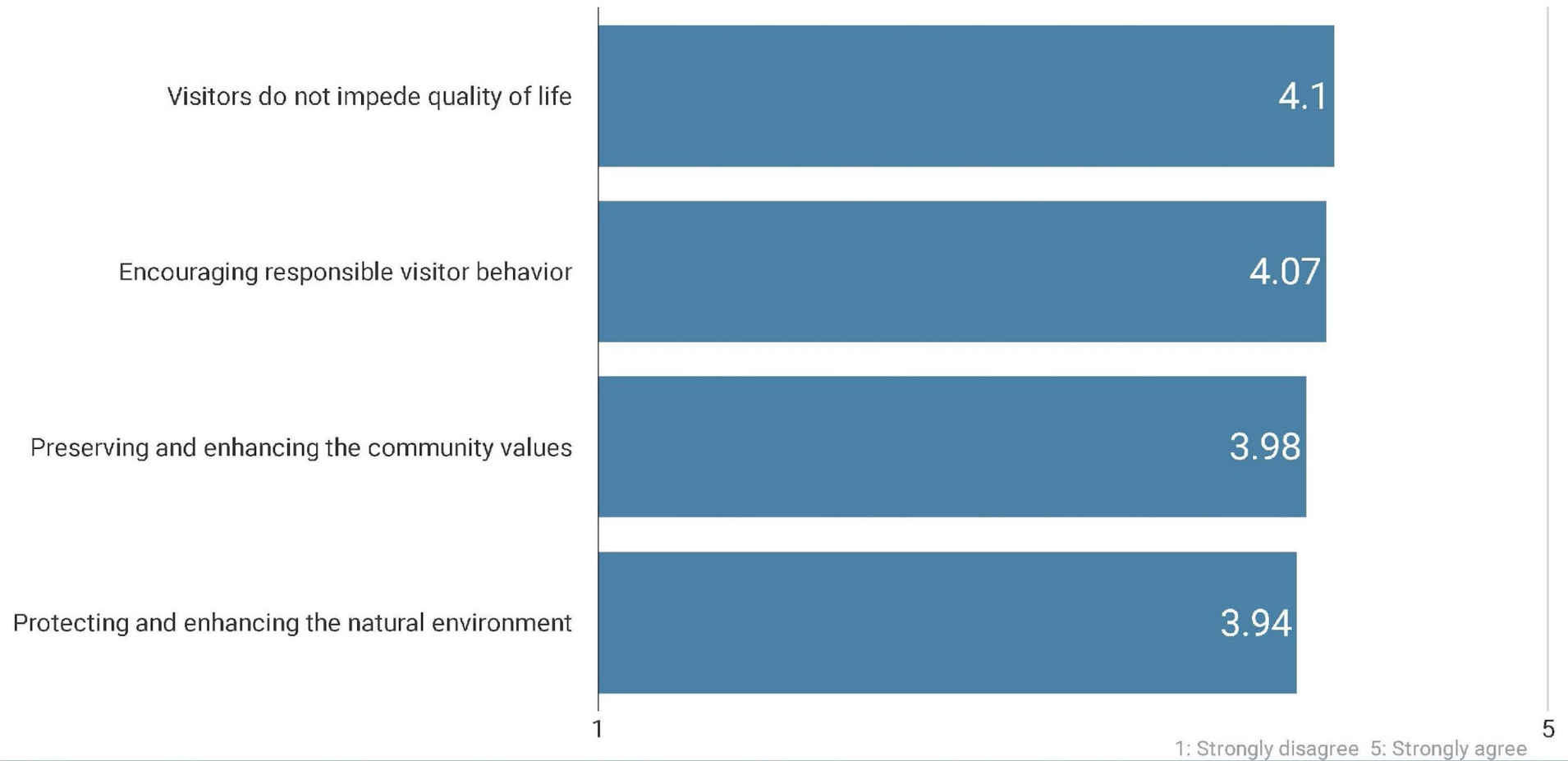
## Funding Support & Certainty



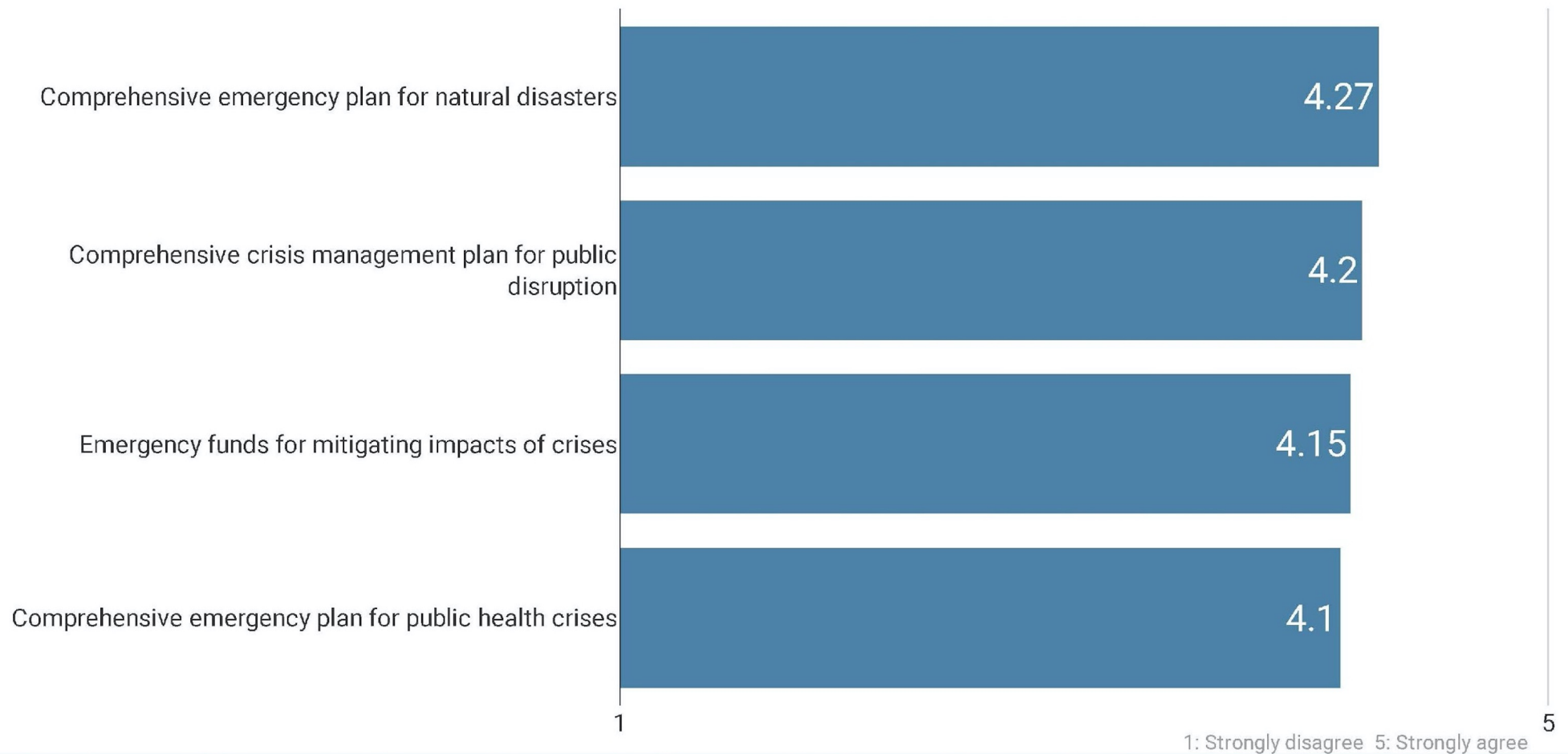
## Regional Cooperation



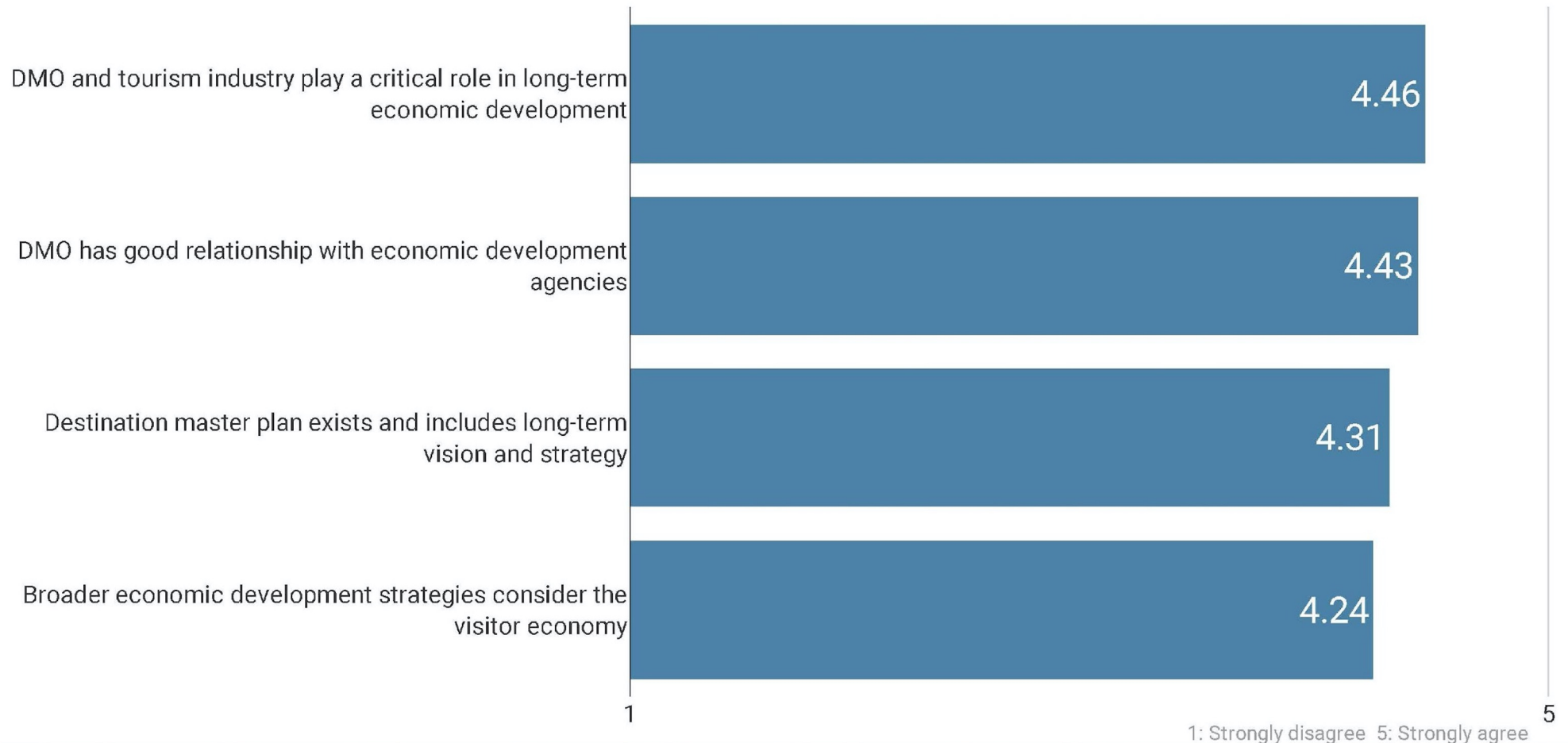
## Sustainability & Resilience



## Emergency Preparedness



## Economic Development





## Are there certain issues that Hamilton County Tourism should specifically address?

### Attractions and Experiences

- Focusing on White River Development with a variety of offerings in our diverse county.
- Hamilton County Tourism is doing a wonderful job addressing all issues and pushing forward for a better county experience. At this time, I sincerely cannot think of anything that is not being addressed!
- As the county grows, its road system may become more congested. If a few major attractions were added, city roads in the immediate and surrounding areas would have to be adequate to support.

### Accommodation

- Enticing hotel and business development in northern Hamilton County along the 31 corridors.
- Limited number of available hotel rooms
- roads and hotels, bed and breakfasts

### Equity, Diversity & Inclusion

- Many Indianapolis residents have historically had a more negative perception of Hamilton County (that it's unwelcoming from a diversity standpoint, that it's too expensive, that it's exclusive).
- Work on fixing the perception of residents of other areas that particularly Carmel is friendly and welcomes diversity.
- I think there is a social perception that Hamilton County is elitist. This issue is getting better and better but does still exist.

# What one thing could Hamilton County do to become a better visitor destination?

## Events & Festivals

- More marketing and financial resources to help attract events.
- Beyond Grand Park, create a commercial "statement" development that attracts visitors year-round. (Great Wolf Lodge, amusement park, etc.). Also, (sorry - this is more than "one thing") create more signature events, such as Artomobilia, that have a unique appeal to targeted audiences - automotive, sports, musical competitions, etc.
- More media coverage of events.

## Accommodation

- Continuing infrastructure improvements and bringing more hotels for people to stay in.
- Have a broader stock of hotels to house visitors or support and encourage more air-BnB or vrbo options.
- more dining opportunities other than fast food. more hotels, entertainment options

## Local Mobility & Access

- We need public transportation connecting us to the airport and downtown. Transportation links between destinations within Hamilton County would also be helpful.
- more support & marketing - more hotels, and transportation infrastructure that will support and fund the destination.
- I think there are two things: light rail/public transportation and affordable housing. If workers can reach Hamilton County with high-quality public transportation, including buses and light rail, even elevated up & down I-69, that eliminates some of the pressure for more affordable housing. Transportation is THE Major Priority.

## How important is the local marketing efforts that Hamilton County Tourism manages?

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### Importance of local marketing efforts that Hamilton County Tourism manages

- The local marketing efforts are extremely important. But, the most important component to focus on is accurately conveying the right message to the right audience. The make-up of Hamilton County is changing rapidly and marketing efforts need to be aligned with the direction and future growth of Hamilton County.
- Very important. Local tourism, especially with high gas prices, is very important. Lots of new people coming to the area don't know what's available.
- They are vital because it's a competitive marketplace for local consumer spending. Plus, our partners rely on HCT to add marketing muscle and carve a niche for their products and local/regional visitor spending. They have to run their businesses; we are here to keep them top-of-mind in a crowded market!

## How important is the out-of-area marketing efforts that Hamilton County Tourism manages?

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### Importance of out-of-area marketing efforts that Hamilton County Tourism manages

- Similar to the local marketing efforts: it's vital because tourists' dollars are finite. If we want to attract dollars from Chicago, Cincy, and Louisville, we have to stand out, promote HC's unique culture, dining & drink, and activity assets, and do so repetitively to stay top-of-mind.
- This is extremely important because externally Hamilton County's reputation will be seen differently externally and out of state than seen regionally.
- Out of area marketing is very important for visitors to become knowledgeable in all facets of our community. As they may be here visiting for a specific event/reason (sports tournament, etc), they should also be aware of other opportunities here to support our local businesses and events.

## Key Takeaways

- Destination is in the Trailblazers quadrant with above average scores for Destination Strength & Alignment.
- Different stakeholder groups have different/aligned perception of Hamilton County.
- There are several opportunities for improvement in Hamilton County as per the lowest rated statements shown:

## Opportunities for Improvement

### Destination Strength

	Statement	Performance ^
1.	Variety of public transportation options	1.95
2.	Adequate public transportation	2.01
3.	Directional multi-language signage	2.44
4.	Airport is accessible with public transit	2.48
5.	Sufficient ride share services	2.90

### Destination Alignment

	Statement	Performance ^
1.	Public transportation for workers	1.92
2.	Adequate affordable housing for workers	2.17
3.	Affordable daycare options for workers	2.51
4.	Adequate workforce for frontline hospitality jobs	2.69
5.	Adequate healthcare options for workers	2.97





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# Thank you

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