

COLORADO TOURISM

ROADMAP

MOVING THE STATE FORWARD THROUGH A STATEWIDE STRATEGIC INITIATIVE

Adopted on March 15, 2017



COME TO LIFE COLORADO

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Colorado Tourism Roadmap prepared by
Nichols Tourism Group, The Radcliffe Company
and the National Laboratory
for Tourism and e-Commerce.



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VISION

Colorado is the premier U.S. destination for active, outdoor and unique experiences that make you feel truly alive.

MISSION

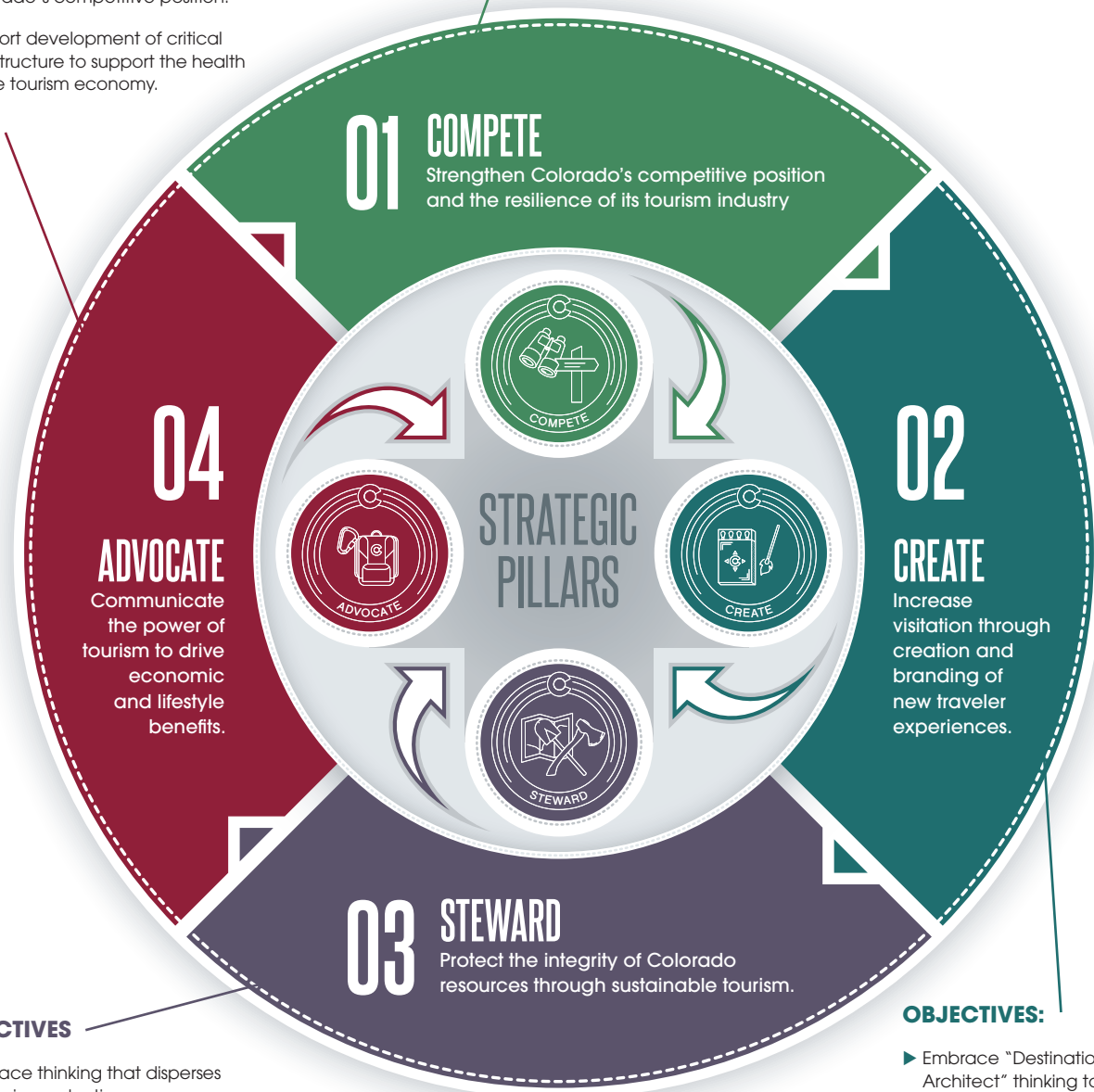
Drive traveler spending through promotion and development of compelling, sustainable travel experiences throughout our four-corner state.

OBJECTIVES

- Build an effective advocacy platform.
- Develop sustainable funding to grow and protect Colorado's competitive position.
- Support development of critical infrastructure to support the health of the tourism economy.

OBJECTIVES:

- Embrace "large team" thinking through partnerships that unlock the full potential of the tourism industry.
- Continue building appeal as a national destination, while generating demand for off-peak periods and less-traveled regions.
- Maximize the connection with Colorado residents.
- Refine international promotion to maximize pull from highest-potential markets.



OBJECTIVES

- Embrace thinking that disperses visitors in productive ways.
- Invite travelers to embrace Coloradans' sustainability ethic while here.
- Create alliances with other stakeholders to magnify the impact of sustainable tourism initiatives.

OBJECTIVES:

- Embrace "Destination Architect" thinking to stimulate economic development, especially in rural areas.
- Craft new incentive programs to stimulate product development.
- Create programs to develop visitor readiness.

1.0 EXECUTIVE SUMMARY

Purpose of the Roadmap

Colorado's visitor industry has grown tremendously in recent years, increasing at twice the national average since 2009 and becoming one of the very top U.S. vacation destinations in the western United States. In May 2016, the Colorado Tourism Office (CTO) initiated a strategic planning process to ensure that the state's tourism industry maximizes its full potential. The Colorado Tourism Roadmap is the result.

This Roadmap, created with the oversight and participation of the Colorado Tourism Board, has been designed as a resource to guide not only the CTO but also its industry partners, large and small, in identifying and prioritizing opportunities to maximize both the economic and lifestyle benefits of tourism.

For any organization, having a clear and concise set of objectives that define the most desirable outcomes makes good business sense. While the Roadmap seeks to advance the strength of the entire industry through increased collaboration, it also includes objectives, strategies and tactics that are just as relevant for a small tourism-related business or Destination Marketing Organization (DMO) as they are for the CTO.

Some of the Roadmap's objectives and strategies are future-focused, but many are immediately actionable and designed to generate near-term wins. It is important to keep in mind that the Roadmap is structured to provide continuing guidance over the next three to five years and that some objectives and strategies cannot come to fruition or achieve their full potential without additional funding resources.

It is also important to note that while many of the objectives and strategies in the Roadmap promote growth in visitation from high-value travelers and traveler spending, the Roadmap does not offer a prescription for unbridled growth. Rather, it aims to create conditions that drive the right kind of growth, with maximum benefit and minimal impact.

Finally, while many of the Roadmap's tenets aim at providing clear guidance for the CTO, this guidance is not prescriptive, but offered in the spirit of partnership to other tourism industry players. In this same way, the Roadmap defines the CTO as the leader in driving visitation to all parts of the state and convener of industry-wide collaborations, like this Roadmap, aimed at enhancing the performance of all.

Creating the Roadmap

Led by the Colorado Tourism Office and coordinated by the planning team of Nichols Tourism Group and the Radcliffe Company, the Roadmap incorporates the voices of more than 1,000 tourism industry professionals, elected leaders and Coloradans. The plan was shaped not only by these insights, gathered in more than 20 listening sessions across the state and via survey posted on a public website, but from extensive analysis of existing CTO research as well as original research by the National Laboratory for Tourism and e-Commerce (NLTeC) in Gainesville, Florida.

Initial findings were compiled into a State of the Industry report shared first at the annual Colorado Governor's Tourism Conference in September 2016 and, subsequently, during a fresh round of statewide listening sessions. This body of work inspired development of both Mission and Vision statements as well as four key Pillars — **Compete, Create, Steward and Advocate** — that form the Roadmap's foundation. Each Pillar is supported by objectives, strategies and tactics aimed at guiding the CTO and its industry partners in building Colorado's competitive advantage through both prosperous and challenging times.



New Pillars, New Directions

All of this new thinking surfaced important new ideas that are integral to this Roadmap. These key themes are expressed mainly through the four Pillars, though it is important to note that some significant concepts spill across multiple Pillars. For example, while a new focus on sustainable tourism practices is housed primarily in the **Steward** Pillar, this stated commitment to responsible tourism permeates the Roadmap.

Of the four Pillars, **Compete** stakes out the most recognizable ground for the CTO and its industry partners, focusing on attracting high-value travelers to build Colorado's competitive position and staying power. Each objective under the **Compete** Pillar charts new directions for marketing success. A key theme is building strength for the entire industry through a strong focus on collaboration. Opportunities abound, whether through sharing web-data intelligence from the budding Marketing Travel Network, fostering new regionally based collaborations or creating a more unified, powerful message for the Colorado ski industry to lift the success of all players in one of the state's most important and differentiating travel segments.

Fresh ground is broken with both the **Create** and **Steward** Pillars. **Create** aims to redefine and expand the traditional role of Destination Marketing Organizations, including the CTO, into *Destination Management Organizations*. For the CTO, this means using the success of its Cultural, Heritage and Agritourism initiative as a springboard for a broader focus on creating new tourism products, supporting entrepreneurship and fostering a unique brand of Colorado hospitality.

The **Steward** Pillar was inspired by heart-felt concerns regarding visitor impacts expressed in listening sessions across the state. Objectives aim at aligning industry partners with groups that share these same goals and together rally around strategies that lead travelers to less-visited destinations and inspire them to embrace Colorado's sustainability ethic while they're here. In short, this Pillar aims at evolving the state's conversation around travelers, to guide travelers in meaningful ways to reduce their impact on precious resources and even help protect them through "voluntourism," both volunteering and giving.

The final Pillar, **Advocate**, taps the power of the tourism industry itself, one of Colorado's most important industry sectors, to push for needed improvements in transportation infrastructure and sustained funding that will build and protect Colorado's competitive edge. These objectives spell out the importance of industry partners unifying to build and communicate a compelling story around the economic and lifestyle benefits

of tourism, which directly fuels nearly 1 in 9 Colorado jobs today and is projected to drive more new Colorado job creation in 2017 than any other industry sector.

Key Findings

The Roadmap's research shed much light on how the Colorado tourism industry has expanded the state's visitor base well above national norms. These insights also illuminated opportunities for the industry to build an even stronger competitive advantage and spread the economic benefits of tourism more widely, while enlisting travelers to participate in strategies that protect and serve the state's special places.

Key findings are as follows:

CUSTOMERS

- ▶ Colorado's rise as a national destination, along with the CTO's shift to targeting millions in media spending to a broader national audience, has generated strong economic impact through major increases in long-haul, high-value visitor segments since 2011.
- ▶ Every region of Colorado experienced impressive growth in traveler spending. The largest gains were recorded in the Denver Metro and Mountain Resort areas, which not only are more likely to attract high-spending, long-haul visitors, but typically have well-funded marketing budgets of their own.
- ▶ Coloradans and border-state residents are more likely than long-haul travelers to consider experiencing Colorado's less-visited regions and seasons.
- ▶ Colorado has strong potential to expand the economic impact of traveler spending by focusing investment on high-spending national and international visitors, while connecting and engaging more deeply with Colorado and border-state residents to explore less-traveled destinations.

PRODUCT OFFERINGS

With its enviable outdoor and cultural assets, Colorado has enormous potential to:

- ▶ Link offerings into compelling visitor experiences by applying "Destination Architect" thinking, taking an active role not only in promotion, but development of new tourism offerings.
- ▶ Create "how-to" resources and ways of supporting tourism-related entrepreneurship that can spur even more development of valuable new tourism assets, particularly in more rural areas.
- ▶ Foster regional collaboration around thematic product offerings, which holds far more promise for visitor attraction than marketing around past regional boundaries.

- ▶ Inspire and educate frontline workers and Coloradans about their local assets — key to increasing visitor awareness of the state's destination potential.

COMPETITION

- ▶ Among the seven Rocky Mountain states, Colorado is top-ranked nationally for a broad range of attributes, including ratings from visitors as the most fun, beautiful, casual, sophisticated, relaxed, luxurious, charming, hip and romantic. It's also ranked No. 1 in the following product categories: skiing, snowmobiling, climbing/ziplining, touring/sightseeing, state and national parks, kid-friendly, cultural, hidden gems, shopping and nightlife.
- ▶ Colorado's top competitors for long- and short-haul American travelers are California and Arizona. Its top competitors regionally are California and Utah.
- ▶ Many Colorado destinations lack a clear understanding of their competitive set and their traveler profile.

DELIVERY SYSTEMS

- ▶ While the CTO's funding ranks it among the top 20 best-funded state tourism offices, flat budgets since FY16 are giving competitor states like Oregon and Utah the chance to leap ahead in their ability to attract the same high-value travelers Colorado targets.
- ▶ Achieving budget parity for Colorado — based on its visitor volume relative to the 20 top-funded state tourism offices — would have requires an annual budget of approximately \$29 million in FY16 versus its \$19.6 million funding that year.
- ▶ Given annual increases in media and other costs, continued flat funding or funding cuts would limit the impact of a highly successful national campaign that triggers traveler interest and significant website engagement for destinations across the state.
- ▶ The CTO currently has only limited funding to match industry partners' marketing efforts or support development of new tourism offerings or events.
- ▶ The Colorado tourism industry's competitive advantage is at risk when Colorado residents and elected officials lack understanding or appreciation for either the economic or quality-of-life impacts of the visitor industry.
- ▶ Traffic congestion, lack of air service, missing intermodal links and threats to natural and human-made resources put the Colorado visitor industry at risk.

Roadmap Outcomes

Collectively, these findings from nearly 10 months of input, research and reflection point to a number of new practices and initiatives that the Colorado tourism industry can embrace over the next three to five years to offset challenges and maximize the opportunities for increasing its collective competitive advantage.

A brief outline of the Roadmap, with its defining Statements and Pillars, is provided below. More detail, including proposed tactics for implementation as well as research support, is provided in the remainder of this report.

STRATEGIC PILLARS



COMPETE:
Strengthen Colorado's competitive position and the resiliency of its tourism industry.

Compete - Objective 1 – Embrace “large team” thinking through partnerships that unlock the full potential of Colorado’s tourism industry.

Strategy 1 – Foster new avenues for collaboration.

Strategy 2 – Spur growth of collaborative marketing alliances.

Strategy 3 – Activate the full potential of Colorado tourism through its people.

Compete - Objective 2 – Continue building Colorado’s appeal as a national destination, while generating demand for off-peak periods and less-traveled regions.

Strategy 1 – Increase national market share of high-value, longer-haul segments.

Strategy 2 – Drive visitor spending for off-peak seasons/less-traveled regions.

Compete - Objective 3 – Maximize the connection with Colorado residents.

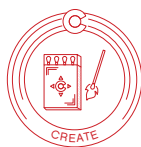
Strategy 1 – Encourage new residents to explore Colorado.

Strategy 2 – Motivate residents to share Colorado with friends and relatives, while increasing awareness of tourism as key to quality of life.

Compete - Objective 4 – Refine the international promotion program to maximize pull from highest-potential markets.

Strategy 1 – Develop a research-based approach to refine targeting of markets.

Strategy 2 – Create partnerships with other states to maximize the western experience for overseas visitors.



CREATE:
Increase visitation through creation and branding of new traveler experiences.

Create - Objective 1 – Embrace “Destination Architect” thinking to stimulate economic development, especially in rural Colorado.

Strategy 1 – Expand the CTO’s successful Cultural, Heritage and Agri-tourism Program into a broader Tourism Development program.

Strategy 2 – Develop “how-to” support for DMOs.

Strategy 3 – Pursue more resource flexibility for DMOs.

Create - Objective 2 – Craft new incentive programs to stimulate product development.

Strategy 1 – Identify and develop lending sources for tourism entrepreneurship.

Strategy 2 – Pursue resources for grants to support new product development.

Create - Objective 3 – Create programs to develop visitor readiness.

Strategy 1 – Launch a “Colorado Concierge” hospitality program.

Strategy 2 – Develop a Visitor Quality Experience Certification Program.



STEWARD:
Protect the integrity of Colorado resources through sustainable tourism.

Steward - Objective 1 – Embrace thinking that disperses visitors in productive ways.

Strategy 1 – Align marketing strategies with capacity for visitors.

Strategy 2 – Create recognition for innovative approaches.

Steward - Objective 2 – Invite travelers to embrace Coloradans’ sustainability ethic while in Colorado.

VISION

Colorado is the premier U.S. destination for active, outdoor and unique experiences that make you feel truly alive.

MISSION

Drive traveler spending through promotion and development of compelling, sustainable travel experiences throughout our four-corner state.

Strategy 1 – Develop and promote voluntourism.

Strategy 2 – Increase Colorado visitors’ embrace of sustainable practices.

Steward - Objective 3 – Create alliances with other stakeholders to magnify the impact of sustainable tourism initiatives.

Strategy 1 – Develop shared messaging, educational and volunteer opportunities.

Strategy 2 – Build collaboration with both government and nonprofit partners.



ADVOCATE:
Communicate the power of tourism to drive economic and lifestyle benefits.

Advocate - Objective 1 – Build an effective advocacy platform.

Strategy 1 – Unite industry interests under the Tourism Industry Association of Colorado (TIAC).

Strategy 2 – Build a comprehensive Colorado tourism “story.”

Strategy 3 – Develop a research-based understanding of the impact of tourism.

Advocate - Objective 2 – Develop sustainable funding to grow and protect Colorado’s competitive position.

Strategy 1 – Research viable funding models for the CTO.

Strategy 2 – Demonstrate potential of new resources.

Advocate - Objective 3 – Support development of critical infrastructure to support the health of the tourism economy.

Strategy 1 – Advocate for air-service enhancements.

Strategy 2 – Advocate for enhancements to highway systems.

Strategy 3 – Advocate for development and maintenance of alternative and multimodal transportation systems, particularly cycling.

2.0 ROADMAP BACKGROUND

2.1 Study Team Composition

The Nichols Tourism Group/The Radcliffe Company (NTG/TRC) team was retained to undertake this strategic planning assignment with Dr. Dan Fesenmaier as research partner.

Mitch Nichols heads NTG, a national leader in providing strategic planning, marketing and development services to the travel and tourism industry. Established in 1996, the firm has completed an extensive array of detailed strategic planning services for clients ranging from convention and visitor bureaus, state tourism offices, destination management organizations, regional tourism promoters, American Indian tribes, the U.S. Forest Service and numerous private developers. NTG's tourism strategy projects have involved work from Alaska to Florida and into Mexico.

David Radcliffe established TRC in 2001 as a multi-dimensional, hospitality-related consulting firm after 26 years in convention bureau management. For 14 of those years, he led the nonprofit Greater Phoenix Convention and Visitors Bureau as president and CEO, earning an international reputation for his innovative leadership and management capability in every aspect of destination marketing and management.

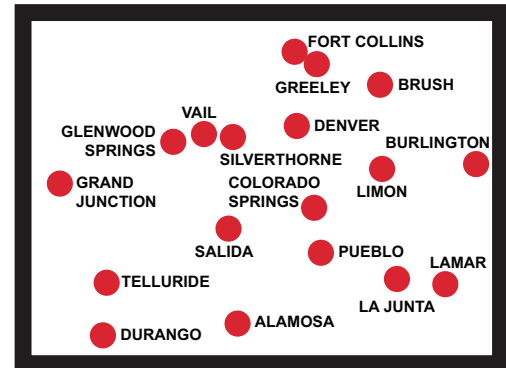
Dr. Dan Fesenmaier is director of the National Laboratory for Tourism and e-Commerce, housed at the University of Florida in Gainesville. Dr. Fesenmaier has authored more than 250 articles on tourism marketing, advertising evaluation and information technology. He is recognized as one of the leading scholars in tourism research and is a fellow in the International Academy for the Study of Tourism, representing the top 75 tourism scholars in the world.

2.2 Report Format

Following the Executive Summary in Section 1 and Background in Section 2, Section 3 presents a review of the "State of the Industry" analysis of factors influencing Colorado's visitor industry. This analysis considers critical issues facing the industry in four strategic areas: Customers, Products, Competition and Delivery Systems.

Based on those findings, Section 4 lays out the Roadmap, beginning with the Vision and Mission statements and set of four foundational Pillars, all approved by the Colorado Tourism Board on January 25, 2017. A mix of objectives, strategies and tactics supports each Pillar. The report concludes with a

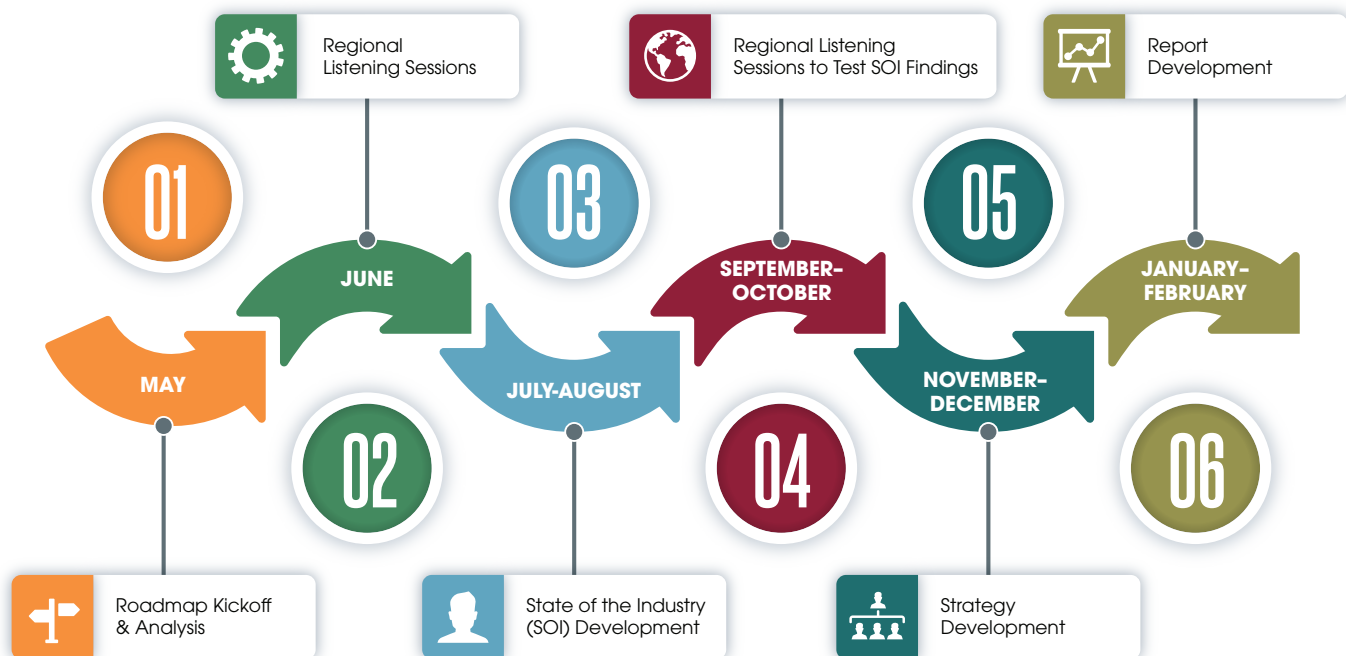
LISTENING SESSION LOCATIONS



series of recommendations for maximizing collaboration among the many partners involved with Colorado's visitor industry.

This report's written findings are supplemented by two PowerPoint decks that were shared in the two rounds of listening sessions. Each provides additional analysis and detail. To develop a full understanding of the Roadmap process and findings, these presentation materials also should be reviewed.

ROADMAP TIMING & PROCESS 2016-2017



3.0 STATE OF THE INDUSTRY

Roadmap construction began with an in-depth investigation of the "State of the Industry," in essence, an examination of the critical issues facing Colorado's tourism industry relative to Customers, Products, Delivery Systems and Competition.

Eight public listening sessions were held across the state to ensure broad participation from tourism stakeholders, including industry partners, government officials and Colorado residents. Locations included Greeley, Denver, Silverthorne, Glenwood Springs, Colorado Springs, La Junta, Alamosa and Telluride. Sessions also were held at the annual meeting of the Colorado Association of Destination Marketing Organizations (CADMO) and at the Colorado Tourism Board's retreat.

3.1 Customers

MAJOR FINDINGS:

- ▶ **Colorado has grown its visitor base at rates far exceeding national norms.**
- ▶ **The CTO's decision to shift its media strategy to a broader national audience has been a key element in reaching long-haul, high-value visitor segments.**
- ▶ **While all parts of Colorado have experienced growth in visitor spending since 2011, the biggest gains have been registered in the Denver Metro and the Mountain Resort regions. These two areas of the state also tend to have large marketing budgets of their own.**

- ▶ **The CTO should maintain its focus on connecting with these long-haul customers to drive high economic returns for Colorado, while also undertaking new efforts to build customer interest and demand in all parts of the state.**
- ▶ **Colorado attracts a high-spending visitor, an achievement that is particularly influenced by the ski visitor segment.**
- ▶ **There is strong potential to connect and engage more deeply with Colorado residents.**
- ▶ **The international visitor is an important high-value customer. New efforts should be pursued to focus marketing on high-potential countries.**
- ▶ **Colorado visitors crave diverse travel experiences that are served up in easy, understandable ways.**

The Colorado tourism industry is a major economic contributor to the state. According to Longwoods International, the state attracted 77.7 million visitors in 2015. Importantly, about 46 percent of these visitors stayed overnight at a Colorado destination. Combined, overnight and day visitors contributed \$19.1 billion of spending in 2015, with direct support for 160,000 jobs.

While the scale of these numbers is impressive, the more powerful story is the overall growth in visitors since 2011.

In 2015, the Metro Denver area attracted approximately 51 percent of direct visitor spending, followed by the Mountain Resorts

SOURCE OF VISITATION

RANK	STATE	OVERNIGHT LEISURE TRIPS
1	Colorado	9,480,000
2	California	3,476,000
3	Texas	2,212,000
4	Florida	1,580,000
5	Illinois	1,264,000
6	New York	948,000
7	Arizona	948,000
8	Kansas	632,000
9	Wyoming	632,000
10	Nebraska	632,000
11	Virginia	632,000
12	New Mexico	632,000

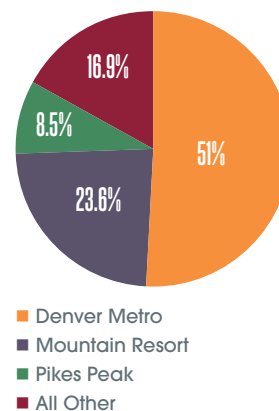
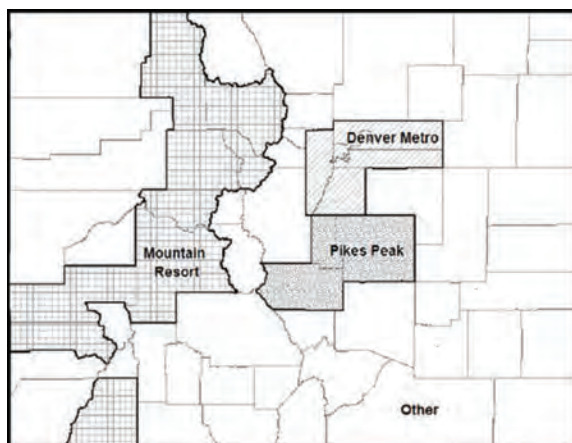
SOURCE: LONGWOODS INTERNATIONAL 2015

GROWTH IN DIRECT SPENDING

REGION	2015	2011-2015
Denver Metro	3.4%	38.7%
Mtn. Resorts	7.6%	37.2%
Pikes Peak	4.3%	16.2%
All Other	1.8%	27.7%
Average	4.2%	34.2%

SOURCE: DEAN RUNYAN ASSOC - COLORADO TRAVEL IMPACTS

VISITOR SPENDING BY REGION



SOURCE: DEAN RUNYAN ASSOC - COLORADO TRAVEL IMPACTS 2015

% OVERNIGHT LEISURE TRIPS BY ORIGIN

REGION	2011	2015	VARIANCE
West*	71	60	-11
Pacific	9	14	5
Midwest	7	8	1
South	8	10	2
Northeast	5	8	3

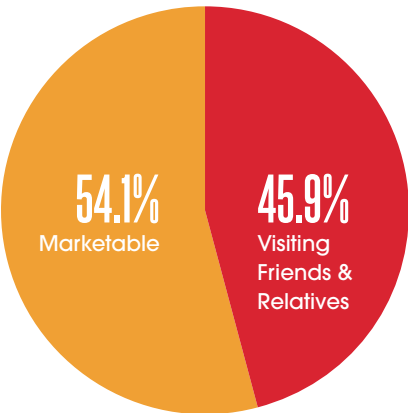
SOURCE: LONGWOODS INTERNATIONAL 2015
 *ARIZONA, COLORADO, IDAHO, MONTANA, NEVADA, NEW MEXICO, UTAH AND WYOMING, IOWA, KANSAS, MINNESOTA, MISSOURI, NEBRASKA, NORTH DAKOTA AND SOUTH DAKOTA, ARKANSAS, LOUISIANA, OKLAHOMA AND TEXAS.

COLORADANS' SHARE OF IN-STATE TRAVEL

	OVERNIGHT TRIPS	DAY TRIPS
% of Trips	30%	66%
% of Spending	20%	65%

SOURCE: LONGWOODS INTERNATIONAL 2015

VFR CRITICAL IN OVERNIGHT LEISURE

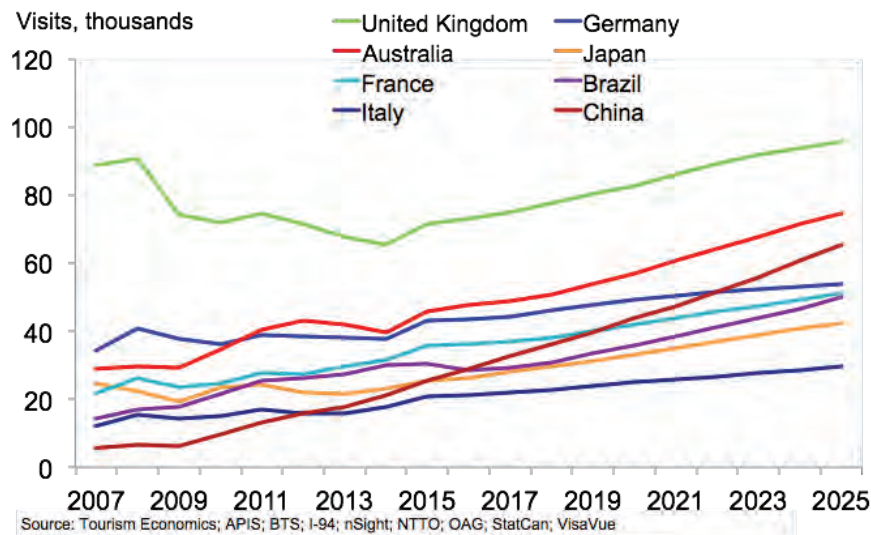


SOURCE: LONGWOODS INTERNATIONAL 2015

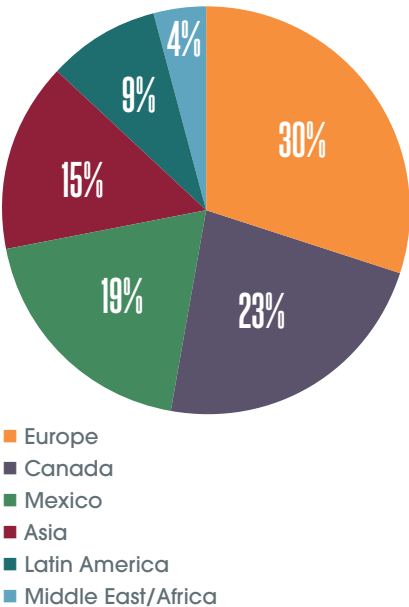


SOURCE: LONGWOODS INTERNATIONAL 2015

COLORADO'S TOP OVERSEAS MARKET TRENDS



INTERNATIONAL VISITS



SOURCE: TOURISM ECONOMICS - COLORADO'S INTERNATIONAL TOURISM MARKET

with about 24 percent, All Other Regions with 17 percent and the Pikes Peak Region with 8 percent.

Gains were experienced in all parts of the state, with the most high-profile destinations recording the highest growth rates. Both Metro Denver and the Mountain Resort regions increased visitor spending by nearly 40 percent between 2011 and 2015. By comparison, the All Other Regions grew by

about 28 percent and the Pikes Peak Region by 16 percent. In 2015, the Mountain Resorts experienced the greatest growth, increasing visitor spending by 7.6 percent that year alone. By comparison, the All Other Regions of the state grew at rates less than half that of the state overall.

When considering the geographic origins of these visitors, Colorado residents themselves are the most significant generator of overnight trips, accounting for about 9.5 million trips in 2015. They are followed by visitors from California, Texas, Florida and Illinois, all high-population states that typically top the list of state visitor segments for many destinations.

However, a different picture emerges when visitor origin is examined from a regional context over time. In 2011, 71 percent of Colorado's visitors came from 19 Rocky Mountain and Great Plains states and Texas, Louisiana and Arkansas. By 2015, only 60 percent of Colorado's travelers were coming from these same 19 states, while significantly more visitors were traveling from the Northeast and Pacific regions.

This change in traveler origins speaks, at least in part, to the success of the state's decision to shift media dollars from spot markets to national outlets, thereby attracting more higher-spending, longer-staying, high-value segments. This strategy likely was a key to the growth in the Denver Metro and Mountain Resort regions. Colorado's more rural regions typically rely more heavily on visitors from Colorado and border states.

Although the state's successful "Come To Life" marketing campaign traditionally has not been targeted at Colorado travelers, these residents are of key importance to the state's visitor industry. Colorado residents account for approximately 30 percent of the state's overnight trips and 66 percent of

the day trips. Because residents who take an overnight trip typically spend less than out-of-state visitors and are more likely to respond to bargain offers, Colorado residents account for only about 20 percent of the overnight spending.

Encouraging Colorado residents to explore their own state, even using their paid time off, carries many gains, however. For instance, the value of importing spending from an out-of-state visitor is reduced when a Colorado resident decides to vacation in California, Utah or Arizona and spend their money there. Capturing as much resident travel spending as possible makes good sense.

This resident connection also is important given that more than half of the overnight leisure travelers to Colorado are coming to visit friends and relatives. The more the tourism industry can engage Colorado residents, the more they can be seen as part of the “sales force,” helping to stimulate both travel and spending statewide.

Another area in which Colorado significantly exceeds national norms is in the high-spending orientation of their visitors. The typical per capita trip spending for a Colorado visitor is \$479, a level one-third higher than the national average.

Of critical importance in achieving this spending variance is the role of Colorado’s ski industry. With spending of \$1,315 per trip in 2015, ski visitors spent nearly three times more than the average Colorado visitor.

The international visitor to Colorado also is an important high-value segment. A Tourism Economics study found that 925,000 international visitors came to Colorado during 2015. Similar to the above-average growth trends in the domestic market, Colorado’s international travel was up 4.5 percent from 2014 levels, at a time when international travel nationally was essentially flat.

When considering the source of international visitors, Europe was the most significant geographic base, generating 30 percent of demand. This was followed by Canada and Mexico, with 23 percent and 19 percent, respectively. With limited resources for international promotion, it is key for CTO to target international markets that hold the greatest potential for influence and growth.

Although international visitors account for just 2.5 percent of total overnight visitation, their impact is oversized due to their high rate of spending. Because many international visitors travel for three or more weeks, they have the potential to visit multiple states. The CTO has an opportunity to join with other

western states to maximize their collective offerings and drive more international interest to the western regions of the country.

Finally, when considering the interests and activities of Colorado visitors, there is a broad mix, ranging from outdoor recreation to heritage to scenic drives. Too frequently, destinations silo their visitors: They are skiers, history enthusiasts or foodies. In reality, for many visitors, they are all of the above, and that visitor needs someone to connect the dots to create interesting, compelling experiences that combine many of their interests.

3.2 Products

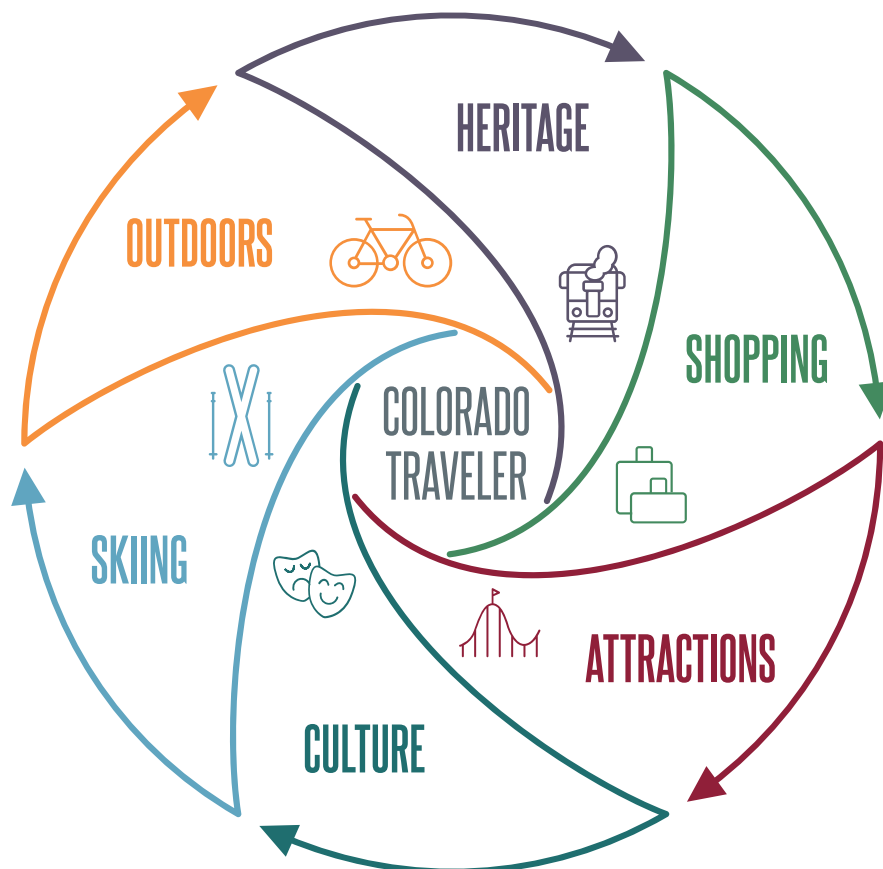
MAJOR FINDINGS:

- ▶ **Colorado has an extraordinarily diverse array of product offerings.**
- ▶ **Through use of new tools and resources to integrate these products into new visitor experiences, these products have great potential for attracting high-value visitor segments to all parts of the state.**
- ▶ **More proactive steps need to be taken to craft and direct product offerings through “Destination Architect” thinking.**
- ▶ **Connections between tourism product development and Colorado businesses should be maximized.**
- ▶ **New ways to engage visitors and provide unique product experiences must be embraced.**

Colorado has an extraordinarily broad array of products and experiences it can offer up to visitors. Longwoods International research provides insight into both *participation* and *differentiation* of various product offerings. For instance, Longwoods’ 2015 report shows that Colorado far exceeds national norms for participation in certain Nature Based/Outdoor activities. The most significant Nature-Based/Outdoor activities for visitor participation are visiting a national or state park, followed by hiking/backpacking and swimming.

A somewhat different picture emerges when considering which Nature-Based/Outdoor activities Colorado visitors experience relative to visitors in other states. Colorado visitors enjoy skiing/snowboarding at 10 times the national averages, while they are at least twice as likely to go mountain climbing, hike or backpack, visit a national or state park, camp, hunt, visit a dude ranch or go glamping (i.e., luxe camping). Similar analysis can be undertaken on other activity areas (heritage, cultural, etc.) to better understand areas of particular differentiation.

COLORADO TRAVELERS SEEK MANY EXPERIENCES IN EACH TRIP



To maximize the power of these products and experiences, the CTO and other Colorado Destination Marketing Organizations should embrace the role of "Destination Architect," taking an active role in creating new tourism offerings. The term "Destination Architect" was coined to recognize the evolution of Destination Marketing Organizations into Destination Management Organizations. In this broader "management" role, DMOs not only market and promote, they play an integral role in actively creating and managing their tourism offerings. They take proactive steps to stimulate new ways to link and integrate existing products, or to identify new development opportunities that could be synergistic with existing Colorado products. Like an architect, a DMO may not actually develop or finance a new product, but is integral in identifying opportunities and bringing entities together to move development forward.

As CTO and other DMOs expand their role as Destination Architects, they can benefit from using the previously noted "participation and differentiation" analysis to identify both the scale of participation of various product areas and the associated level of differentiation.

Further understanding of the power of specific travel offerings can be gleaned from sources like Trip Advisor to recognize what actual visitors are talking about and how these products are dispersed around the state. Evolving resources, like the CTO's Marketing Travel Network (MTN), developed in partnership with Internet Honey, can also deliver insights into the products and experiences visitors are embracing.

DMOs can then use these kinds of product analyses and inventories to highlight their most compelling products and group them into linked and integrated themes, potential-

ly with other tourism partners.

It is important to recognize that the CTO already has embraced this Destination Architect role through its Cultural, Heritage and Agritourism Program. This CTO initiative created new resources to assist early-stage businesses and products seeking to expand their attractiveness as a tourism destination. The CTO now has a major opportunity to expand the lessons and skills developed through this program to an even broader array of tourism product areas.

As part of this Destination Architect role, the CTO can also integrate sustainability concepts — such as creating volunteer opportunities for Colorado travelers. This could not only enhance Colorado and create an extraordinary visitor experience, but can demonstrate to Coloradans how the visitor industry can be a positive force for building support for fragile Colorado products. Whether working to disperse visitors to lesser-known destinations that can support higher utilization, helping visitors understand the best times to see a particular attraction, or helping educate visitors on how to be good stewards while visiting Colorado, DMOs can be key facilitators in heightening the awareness of good stewardship and sustainable tourism.

Colorado DMOs also have an opportunity to partner with Colorado businesses that previously may not have thought of themselves as part of the tourism industry. Non-traditional partners in new tourism development now include businesses like John Deere, Caterpillar and Viking Stoves. Various destinations have used these partnerships to help fund and support new tourism product development efforts, including museums that drive significant new visitor demand while revitalizing industrial areas.

There is a range of opportunities for Colorado's tourism industry to integrate non-traditional businesses in new product development efforts. One example is a company like Voormi with its broad range of high-performance outdoor apparel. This company has a strong commitment to Colorado and its home in Pagosa Springs. There are many ways a company like Voormi could partner with a DMO and create offerings that could resonate with Colorado visitors.

In the Destination Architect role, identification of these types of partners will take on increased prominence, stimulating creative ideas and bringing new alliances with Colorado businesses.

Finally, it is important that as DMOs pursue new product development initiatives, they consider new technology to engage visitors and bring the stories, sounds and images of tourism offerings to a heightened level. Other third-party entities like geotourist, detour and FIELDtrip are creating powerful visitor experiences. Colorado DMOs would benefit from applying similar thinking as they create new offerings.

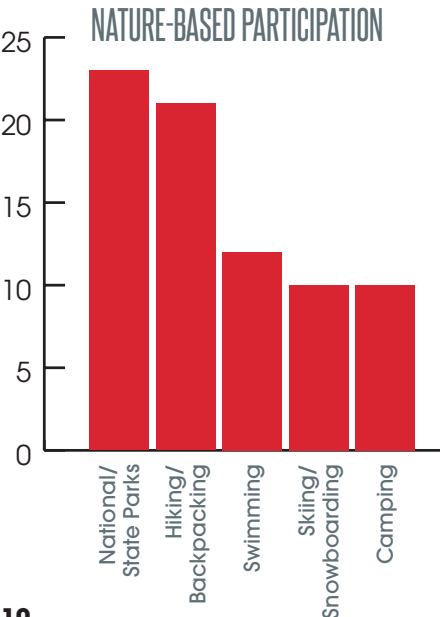
THINK DESTINATION ARCHITECT

- 1 IDENTIFY TOP COMPELLING PRODUCTS
- 2 GROUP IN THEMES
- 3 POSITION AS COLLABORATIVE MARKETING OPPORTUNITY

IMPORTANT ELEMENTS TO CONSIDER AS A DESTINATION ARCHITECT

- STAYING POWER
- VISITATION TRENDS
- ECONOMIC CONNECTIVITY
- NEW WAYS TO ENGAGE

COLORADO OUTDOORS PARTICIPATION & DIFFERENTIATION



COMPARED WITH U.S. NORMS

Skiing/ Snowboarding	10.0 X
Mountain Climbing	4.0 X
Hiking/ Backpacking	2.6 X
National/ State Parks	2.1 X
Camping	2.0 X

SOURCE: NTG/TRC BASED ON LONGWOODS INTERNATIONAL 2015

3.3 Competition

MAJOR FINDINGS:

- In a Image and Perception study fielded to a national audience in 2016, Colorado was ranked No. 1 among the seven Rocky Mountain states for a multitude of desired feelings, including beautiful, fun, relaxing, casual, hip, sophisticated and charming.
- Colorado also won top ranking for a variety of visitor activities, including skiing and snowboarding, mountain climbing/ziplining, national parks, cultural, hidden gems, kid-friendly and nightlife.
- For both long- and short-haul prospects considering travel to Colorado, top competitors included Arizona, California and Florida. Residents of Colorado and other Rocky Mountain states were more likely to consider California, Utah and Nevada as alternatives to a Colorado vacation.
- Many of these competitive states possess significantly larger budgets to target prospective Colorado visitors and are using innovative approaches to integrate products and guide visitors around their states.
- Close tracking of these competitive states' marketing position will be crucial to maximizing Colorado's future performance.

To gain deeper insight into Colorado's competitive environment, the study team fielded a new Image and Perception Study.

In this analysis, prospective Colorado visitors from around the country were surveyed to gain insights as to how they see Colorado, and importantly, how Colorado stacks up to other competitors in the Rocky Mountain West. For survey purposes, the Rocky Mountain West included the seven states of Montana, Wyoming, Utah, Nevada, Colorado, Arizona and New Mexico. The analysis also considered variation among different geographic sources of visitation, long-haul markets generated from East Coast markets, shorter-haul markets coming from destinations like Illinois, Texas or California, and regional markets for visitors coming from the seven Rocky Mountain West states.

Findings from the survey reinforced just how strongly Colorado is perceived as a great destination. When prospective visitors were asked which Rocky Mountain state they associated a variety of feelings with, Colorado consistently showed its dominance. It was rated the No. 1 state for feelings such as beautiful, fun, relaxing, sophisticated and romantic. The state ranked last on only one feeling: boring. Especially significant was the broad range of Colorado's top rankings. It's this ability to speak to a diverse range of visitors' desires that is an important competitive attribute of the state. While Colorado was often at the top of the list, it is also important to recognize that Arizona was frequently the second most attractive state and that this state was a strong competitor in many of the rankings.

When prospective visitors were asked to rank the Rocky Mountain states in regards to the activities they provided, Colorado again showed its dominance. It ranked No. 1 in a host of areas, including skiing, snowmobiling, climbing, state and national parks, cultural

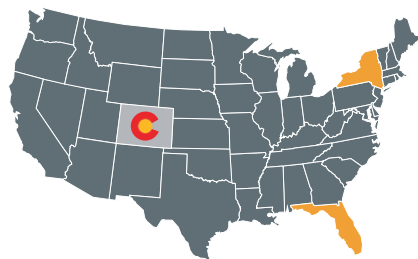
HOW U.S. TRAVELERS RANK COLORADO AMONG ROCKY MOUNTAIN STATES

FEELINGS	STATE RANK
Beautiful	#1
Fun	#1
Relaxing	#1
Sophisticated	#1
Luxurious	#1
Charming	#1
Hip	#1
Romantic	#1
Diverse	#2
Peaceful	#2
Boring	#7

ACTIVITY	STATE RANK
Skiing	#1
Sledding/Snowmobiling	#1
Climbing/Ziplining	#1
Touring/Sightseeing	#1
National Parks	#1
Cultural	#1
Hidden Gems	#1
Shopping	#1
Kid Friendly	#1
Nightlife	#1
Architecture	#2

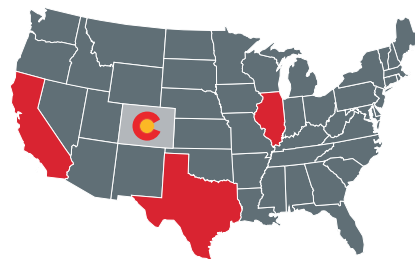
SOURCE: NTG/TRC/NLTEC - 2016 IMAGE/PERCEPTION STUDY. COMPARISON STATES INCLUDE ARIZONA, COLORADO, MONTANA, NEVADA, NEW MEXICO, UTAH, WYOMING.

COLORADO'S COMPETITIVE SET



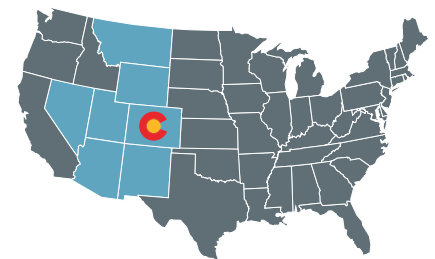
LONG HAUL

RANK	STATE	%
1	Arizona	34.6%
2	California	29.8%
3	Florida	29.8%
4	Nevada	26.8%
5	New York	22.0%



SHORT HAUL

RANK	STATE	%
1	California	35.6%
2	Arizona	25.6%
3	Florida	25.1%
4	New York	21.7%
5	Nevada	20.8%



REGIONAL

RANK	STATE	%
1	California	25.4%
2	Utah	22.3%
3	Nevada	22.1%
4	New Mexico	21.8%
5	Arizona	20.7%

SOURCE: NTG/TRC/NLTEC - 2016 IMAGE/PERCEPTION STUDY. PLACES OTHER THAN COLORADO THAT PEOPLE WERE CONSIDERING AS A TRAVEL DESTINATION.

and family categories. Arizona typically was ranked next highest for many attributes. Montana also fared strongly, particularly in active, outdoor-related categories.

Although Colorado won top rankings among the Rocky Mountain states, the survey also showed that more distant states typically were considered as alternatives for Colorado. For both longer-haul and shorter-haul prospective visitors, Arizona, California, Florida and Nevada were often cited as alternative options, demonstrating that alternatives with a very different product offering could be strong competitors for Colorado. For regional travelers, California, Utah, Nevada and New Mexico were cited as top alternatives.

Thus, while Colorado has strong attributes recognized by visitors across the country, its consideration set includes other strong competitors. As will be shown in the next section, many of these competitor states have significantly increased their resources for marketing and connecting with prospective visitors. Many of these states recognize Colorado's success and are aggressively working to convince visitors to choose their state over Colorado.

Other state competitors also are using effective approaches to help differentiate their destinations from others. Joining arms with its stunning national parks, Utah is actively promoting its "Mighty Five," while guiding visitors to other destinations with a variety of themed road trips, helping visitors understand not just what to see, but how to get there.

Lessons also can be taken from Oregon, which has made important strides in helping early-stage tourism businesses grow and develop. Through programs like the Oregon Tourism Studio and the state's Bike Certification program, they also have increased tourism partners' awareness of how to speak to needs and desires of this visitor segment. This has also raised Oregon's identity as a bike-friendly destination across the country.

Going forward, Colorado must continue to use research to evaluate the competitive landscape, and consider if innovative initiatives undertaken elsewhere have applications within the state.



3.4 Delivery Systems

MAJOR FINDINGS:

- ▶ **To protect and build Colorado's competitive advantage, DMO funding sources at state, regional and local levels must be competitive and stabilized.**
- ▶ **To ensure the broader role of the visitor industry is understood and appreciated, statewide advocacy initiatives are required.**
- ▶ **Transportation challenges threaten the future success of Colorado's tourism industry.**
- ▶ **More meaningful regional collaboration is needed to maximize the distribution and effective flow of visitors, and**
- ▶ **Broadening the CTO's role to act on Roadmap strategies, particularly by expanding its role in destination development, would create stronger connections with Colorado residents and engage other organizations to advocate on behalf of the industry.**

"Delivery Systems" refers to the ways Colorado delivers visitors to the state, whether by resources deployed through its tourism office, other DMOs or major attractions (such as ski resorts); the state's transportation infrastructure, including highways, airports and multi-modal links; as well other efforts to disperse visitors in targeted ways.

Although Colorado's investment in tourism promotion ranks among the top 20 states, flat budgets since FY16 and the possibility of future budget cuts point to a potential declining competitive position. With other states' funding — including Oregon and Utah's — leapfrogging ahead of Colorado's, there are valid concerns about the state's ability to hold its competitive position in the future. With steady increases in costs, including media, a flat budget in actuality means declining ability to invest in services and promotion.

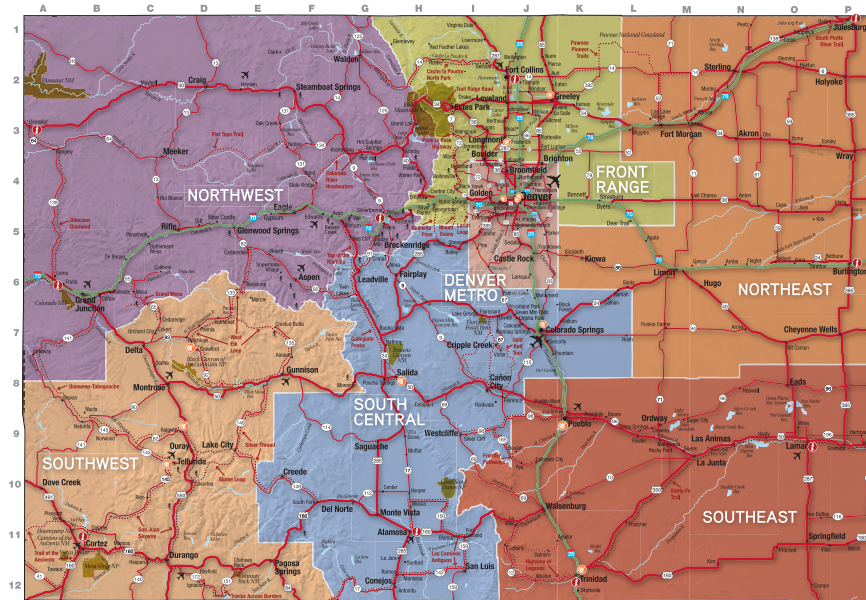
Many of Colorado's strongest competitors have access to increased funding, enhancing their ability to target the same high-value visitor central to Colorado's strategy. This represent a unique challenge for the CTO, as programming and marketing initiatives

TOP 20 STATE TOURISM OFFICE BUDGETS

RANK	STATE	BUDGET FY 2015-2016	% CHANGE
1	California	\$119,881,265	0.00%
2	Hawaii	\$93,255,548	21.20%
3	Florida	\$82,727,272	10.50%
4	New York	\$50,000,000	100.00%
5	Texas	\$46,583,000	-5.80%
6	Michigan	\$33,000,000	13.80%
7	Illinois	\$30,346,576	-44.40%
8	Virginia	\$23,567,934	25.10%
9	Arizona	\$22,170,674	-10.10%
10	Louisiana	\$21,007,513	40.50%
11	Missouri	\$20,804,990	-0.90%
12	Utah	\$19,845,767	16.30%
13	Colorado	\$19,600,000	0.00%
14	Oregon	\$19,352,007	34.10%
15	Montana	\$18,705,590	15.70%
16	Tennessee	\$18,568,731	29.40%
17	Nevada	\$17,887,678	26.70%
18	South Carolina	\$16,057,718	25.40%
19	Arkansas	\$15,942,739	-3.00%
20	Wisconsin	\$15,845,601	2.70%

SOURCE: US TRAVEL ASSOCIATION & CTO

FY16 BUDGET \$19,600,000
PARITY BUDGET \$29,000,000

CURRENT REGIONAL BOUNDARIES

take time to yield returns, and declining investments have a cumulative effect on future returns.

When considering the right budget level for the CTO relative to the other top 20 state tourism offices, a "parity" budget based on the scale of Colorado's visitor industry suggests that the CTO budget in FY16 should have been \$29 million, rather than \$19.6 million. Although this ratio and analysis is not absolute, it is a reasonable way to approach future budgeting discussions and decisions.

In other states, private sector tourism industry leadership has demonstrated the value of engagement with elected officials and other business leaders. Colorado's industry associations, the Colorado Association of Destination Marketing Organizations (CADMO) and the Tourism Industry Association of Colorado (TIAC) are critical partners in the efforts to educate and communicate with these officials and the citizenry of Colorado.

Efforts to effectively articulate the true and full impacts of visitor spending should include not only economic factors like employment and tax revenue, but also the quality-of-life benefits that tourism-related activities help create for Colorado residents. While lifestyle impacts may be less obvious to the average resident, attraction of tourists directly influences the depth of lifestyle amenities that make the state and many destinations so attractive to its residents.

Because the CTO has limited ability to lobby on its own behalf, it is vitally important for industry associations to take a strong, united stand on expressing the value and benefits to their respective states. Successful examples are evident in both Arizona and California, where industry associations have initiated successful communication strategies that have led to important increases in resources and programming for the official tourism offices. CADMO and TIAC should

consider expanded roles and important communication strategies in representing the industry by its support of the CTO.

Effectively dispersing visitors throughout the state is an important goal of the CTO. However, it was clearly expressed by many who took part in listening sessions that the current regional designations do not reflect how visitors organically discover and connect the many travel gems across the state. Thus, as currently drawn, the regions do not provide a meaningful focus for regional collaboration whether for promotion or new product development. The CTO may consider efforts to revamp regional designations that more accurately reflect how visitors actually connect in-state assets and experiences.

Geographically, Colorado is a big territory. Driving visitor spending in all areas of the state requires close collaboration between the regions and the CTO. Encouraged by CTO leadership and initiatives, regional collaboration for creation of new product experiences and promotion increases the

likelihood of capturing overnight stays and associated spending. This represents an important win-win scenario both for the state and for destinations across Colorado.

Protecting the state's most valuable visitor assets from overuse is an important strategic objective for the tourism industry as a whole as well as for the CTO and other DMOs. Encouraging travelers to sample lesser-traveled, yet uniquely Colorado destinations spreads the benefits of tourism more widely, protects precious assets and gives visitors bragging rights for out-of-the-ordinary experiences.

New strategic priorities reflected in the Roadmap suggest that existing budget levels and priorities for the CTO will require modification to maximize the benefit of new strategies to improve Colorado's competitive position. To this end, the Colorado Tourism Board will play a critical role in shaping new strategic directions and unifying industry partners to align with strategic objectives. CADMO and TIAC, as leading industry organizations, should activate the power of the industry and encourage collaboration among tourism stakeholders across the state in support of these new strategic priorities.

In closing, it is important to note that the State of the Industry in Colorado reflects several critical issues central to the Roadmap and its successful implementation. Building an effective advocacy platform that leads to a greater understanding of the impacts of tourism on the Colorado lifestyle and justifies the ongoing support from the legislature is paramount.

Further, modifying budget deployments and the allocation of resources in ways that address all the Roadmap priorities will be essential to the success of this plan. These modifications must encourage regional partnerships in ways that help distribute visitation and visitor spending across the state, while sustaining unique and compelling Colorado visitor assets for future generations of residents and visitors alike.



4.0 ROADMAP IMPLEMENTATION

Using the findings of the State of the Industry as a foundation, this section outlines how the Colorado tourism industry should strategically position itself for the future. Based on new Vision and Mission statements along with four strategic Pillars that incorporate a mix of objectives, strategies and tactics aimed at guiding successful implementation of the Roadmap. The ultimate Roadmap goal is for the Colorado tourism industry to fully maximize its competitive advantage.

4.1 Vision, Mission and Pillars

Throughout this planning process, a wide variety of perspectives were gathered to express the Colorado tourism industry's potential in coming years. This Vision is intentionally aspirational and focused on how Colorado will be regarded in the future.

VISION

Colorado is the premier U.S. destination for active, outdoor and unique experiences that make you feel truly alive.

The Mission reflects the industry's critical role in generating economic impact while expanding the mix of products and experiences in all regions of the state in a way that promotes responsible use of the state's valuable resources.

MISSION

Drive traveler spending through promotion and development of compelling, sustainable travel experiences throughout our four-corner state.

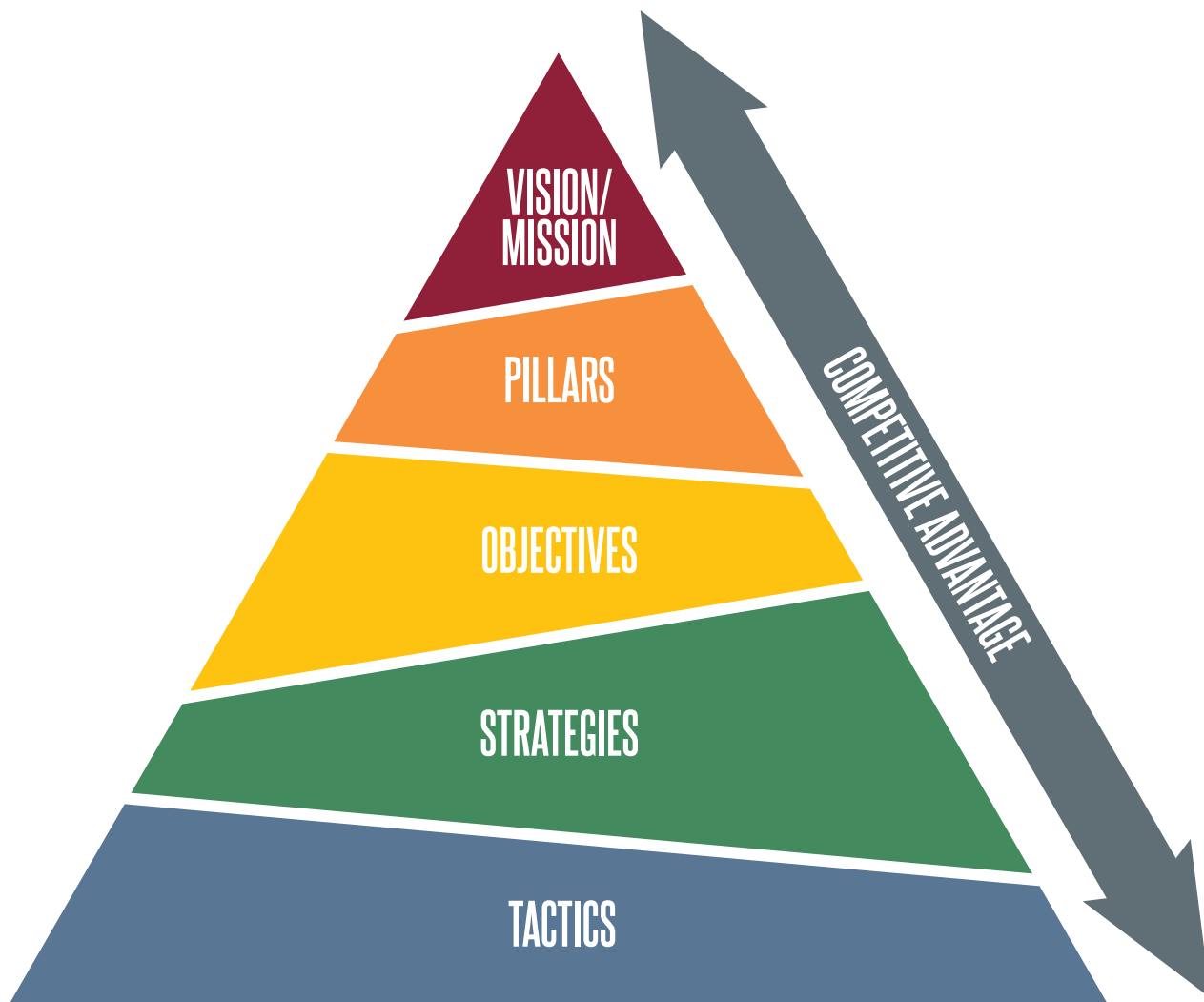
To help achieve this Vision and Mission, four strategic Pillars that serve to organize the objectives, strategies and tactics. The four Pillars include:

Compete – Strengthen Colorado's competitive position and the resiliency of its tourism industry.

Create – Increase visitation through creation and branding of new traveler experiences.

Steward – Protect the integrity of Colorado resources through sustainable tourism.

Advocate – Communicate the power of tourism to drive economic and lifestyle benefits.





4.2 Compete Pillar

The Compete Pillar is focused on strengthening Colorado's competitive position and the resiliency of its tourism industry.

COMPETE - OBJECTIVE 1 - EMBRACE "LARGE TEAM" THINKING THROUGH PARTNERSHIPS THAT UNLOCK THE FULL POTENTIAL OF COLORADO'S TOURISM INDUSTRY.

Colorado's wide range of tourism organizations and businesses each has a mix of resources that, with increased cooperation, could be integrated to enhance the overall power of a collective "Colorado team." Strategies to act on this objective include the following.

STRATEGY 1 - FOSTER NEW AVENUES FOR COLLABORATION.

Tactic 1: Build The MTN.

This initiative, being led by the CTO in partnership with vendor partner Internet Honey, is creating a powerful consortium of industry websites. This integrated network provides deep insight into the traveler's journey from inspiration to booking and potential for sharpening and executing targeted marketing strategies. The CTO should continue to recruit and support participation and collaboration within the MTN.

Tactic 2: Build BrandShare participation.

CTO's new BrandShare concept, now in a pilot phase, provides a way for industry partners to leverage the power of the CTO's highly successful national campaign for their own marketing. By embracing CTO brand standards and complying with requirements around minimum campaign investment, partners can access prospects at the "top of the funnel" while supporting CTO's goals of expanding the reach of the statewide marketing campaign. The CTO should use pilot test insights to extend this offering to industry partners.

Tactic 3: Integrate digital co-op marketing initiatives.

The CTO should develop and underwrite new cooperative marketing opportunities to provide partners increased opportunities to share their messages with targeted segments and markets.

STRATEGY 2 - SPUR GROWTH OF COLLABORATIVE MARKETING ALLIANCES.

Tactic 1: Integrate the Colorado ski industry.

Colorado rightly claims the tagline "America's Best Skiing®." But a lack of alignment within the state's ski industry can undermine the potential for a powerful, integrated message to both domestic and international travelers about the superlative nature of a Colorado ski vacation. The CTO, DMOs and ski industry should join in building a deeper collaboration to present a seamless, compelling offering to prospective visitors.

Tactic 2: Develop a regional branding initiative.

The regional boundaries established decades ago are widely questioned. Many industry partners do not believe these regions accurately reflect the way visitors experience the state or depict true regional connections. The CTO, in cooperation with industry partners, should take a fresh look at establishing regional theming or boundaries that would provide industry partners with platforms for meaningful marketing collaborations.

Tactic 3: Integrate native voices.

There is a diverse range of native cultures and stories in Colorado and increased efforts should be undertaken to present them as part of an integrated regional experience, not just as a stand-alone, segmented experiences.

Tactic 4: Maximize the potential of Colorado Welcome Centers.

Colorado is home to a rich range of native cultures and stories, which provide compelling cultural experiences for many travelers, including international visitors. Rather than treat these as stand-alone, segmented experiences, the CTO and others can find opportunities to deepen messaging and

traveler experiences by incorporating this history into integrated regional experiences.

Tactic 4: Support growth of meetings and specialty markets.

Supporting the growth of the meetings market not only draws high-value business travelers, but oftentimes drives extended stays and repeat visits for leisure. Current funding levels for Destination Colorado and Tour Colorado support trade show attendance and modest joint marketing initiatives. With enhanced funding, CTO could provide more robust support, such as a targeted roadshow strategy for Destination Colorado, or provide significant support for bringing major sporting events to Colorado destinations.

Tactic 5: Maximize the potential of Colorado Welcome Centers.

The 10 Colorado Welcome Centers have operated for many years with limited resources and are staffed primarily by volunteers. While Colorado's welcome centers earn high marks for hospitality, low budgets have limited physical upgrades and the introduction of technology. The findings of a new visitor center survey and study should be utilized to help re-invent how the Welcome Centers are used, develop productive partnerships with aligned state agencies and determine potential reallocation of Welcome Center resources to improve visitor understanding of linkages among regional destinations and products.

STRATEGY 3 - ACTIVATE THE FULL POTENTIAL OF COLORADO TOURISM THROUGH ITS PEOPLE.

Tactic 1: Launch new Tourism Leadership Program.

Developing leadership potential in the tourism industry is one important way that the CTO can support the growth of one of the state's biggest industry sectors. Supporting employers in promoting career growth for high-potential middle managers not only creates value for both employers and employees, but would lead to a stronger, more unified, engaged and high-performance tourism industry that is even better equipped to be a leading economic driver for Colorado.

QUANTIFYING & PRIORITIZING THE HIGH VALUE TRAVELERS

DRIVERS OF ECONOMIC IMPACT

- SHORT + LONG HAUL TRAVELERS



DRIVERS OF DISPERSION

- IN-STATE AND REGIONAL TRAVELERS
- SPREAD ECONOMIC IMPACT THROUGHOUT STATE
- MITIGATE IMPACT ON NATURAL RESOURCES

Tactic 2: Create Colorado Tourism Youth Council.

For long-term sustainability, the CTO as well as industry partners would be well-served by tapping into the concerns, knowledge and potential of younger Coloradans, particularly those seeking degrees in tourism-related fields of study. This initiative could incorporate internships, field trips, educational elements or mentoring.

COMPETE - OBJECTIVE 2 - CONTINUE BUILDING COLORADO'S APPEAL AS A NATIONAL DESTINATION, WHILE GENERATING DEMAND FOR OFF-PEAK PERIODS AND LESS-TRAVELED REGIONS.

As explained in Section 3.0 of this report, Colorado has leapfrogged past many other states in attracting visitors in recent years, increasing its share of the national travel pie. The state should continue to build on these successes, while undertaking new initiatives to spur interest in all parts of the state.

STRATEGY 1 - INCREASE NATIONAL MARKET SHARE OF HIGH-VALUE, LONGER-HAUL SEGMENTS.

Tactic 1: Expand CTO's national paid-media strategy.

Recent advertising-effectiveness studies have shown that CTO is enhancing the return on investment for its paid media by shifting from spot markets to a national campaign. CTO should continue to monitor this trend and evaluate shifting even more dollars to a national strategy.

Tactic 2: Broaden winter market attraction.

Given the state's enormous advantage as the top U.S. ski destination, the CTO and ski partners should unify around embracing Colorado's identity as America's Best Skiing®. A unified winter message for Colorado not only can attract ski visitors, but also showcase other winter-based travel opportunities around the state. Visitors can sample a mixture of experiences no other state can provide, creating potential for inspiring return visits in winter and other seasons.

STRATEGY 2 - DRIVE VISITOR SPENDING FOR OFF-PEAK SEASONS/ LESS-TRAVELED REGIONS.

Tactic 1: Promote integrated travel experiences.

As defined under the Create Pillar, Colorado has great opportunity to link and integrate products in more meaningful ways for visitors. Through the development and promotion of these linked experiences, the CTO and industry partners can lead a broad range of prospective Colorado visitors to experience lesser-traveled areas and seasons.

Tactic 2: Create regionally based co-op programs.

Regionally focused co-op programs directed by the CTO can stimulate increased coordination of resources to drive visitor interest in targeted regions of Colorado. These programs would be another way to focus on travel concepts and themes that drive interest in all corners of the state and in non-peak travel periods.

Tactic 3: Develop off-peak/regional discount programs.

Along with creation of linked experiences and co-op marketing efforts, a mix of incentives could be developed in conjunction with private-sector businesses that would further stimulate visitor interest. While the CTO could act as convener and aggregator, industry partners and businesses would take the lead in developing and coordinating special offers.

COMPETE - OBJECTIVE 3 - MAXIMIZE THE CONNECTION WITH COLORADO RESIDENTS.

STRATEGY 1 - ENCOURAGE NEW RESIDENTS TO EXPLORE COLORADO.

Tactic 1: Connect with Colorado residents.

As noted in Section 3.0, many Colorado residents are relatively new to the state and have not experienced the broad range of visitor experiences in their own backyard. New promotional initiatives should be directed to Colorado residents that help showcase these opportunities and stimulate them to explore the state, rather than take their dollars to destinations outside Colorado.

Tactic 2: Launch "Real Coloradan" games.

A wide range of fun, game-oriented initiatives could be crafted to help new residents deepen their roots as Coloradans, while expanding their understanding of the visitor industry and its importance to the state.

STRATEGY 2 - MOTIVATE ALL RESIDENTS TO SHARE COLORADO WITH FRIENDS AND RELATIVES, WHILE INCREASING THEIR AWARENESS OF TOURISM AS A KEY TO THEIR QUALITY OF LIFE.

Tactic 1: Use residents as part of sales force.

Nearly half of Colorado's visitors come to the state to visit friends and relatives. New initiatives, similar to the one Florida used in its "Share a Little Sunshine" campaign, should be aimed at inspiring residents to show off their state and, in essence, become part of the CTO's sales force.

Tactic 2: Integrate advocacy messaging.

As new efforts are launched to connect with Colorado residents, part of the messaging should incorporate themes that reinforce the importance of Colorado's tourism industry and ways it promotes the Colorado lifestyle.

COMPETE - OBJECTIVE 4 - REFINE INTERNATIONAL PROMOTION PROGRAM TO MAXIMIZE PULL FROM HIGHEST-POTENTIAL MARKETS.

STRATEGY 1 - DEVELOP RESEARCH-BASED APPROACH TO REFINE TARGETING OF MARKETS.

Tactic 1: Increase understanding of international market potential.

CTO's programs and resources for stimulating international visitors have been relatively dispersed across the globe. Using new research resources, such as Tourism Economics' International Tourism Market analysis, CTO should refine and prioritize its international targets, focusing resources on countries and regions holding the greatest potential for growth and deeper penetration. Companion research should continue to evaluate whether program refinements are yielding the desired impact.

Tactic 2: Align resources with high-potential strategies.

As new priorities are developed, ensure that promotional resources are aligned to communicate effectively with targeted international audiences.

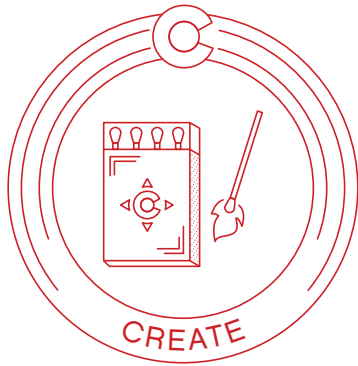
STRATEGY 2 - CREATE PARTNERSHIPS WITH OTHER STATE TOURISM PROGRAMS TO MAXIMIZE THE WESTERN EXPERIENCE FOR OVERSEAS VISITORS.

Tactic 1: Develop interstate "co-opetition."

International visitors often come for a multi-week visit and experience a mix of states when coming to the western U.S. While states like California, Montana and Utah can be competitors for some visitor segments, they can be allies in cooperatively targeting international visitors to consider western, rather than eastern, portions of the country. Initiatives similar to Discover New England should be pursued, bringing an integrated, multi-state presentation to international prospects. Clarity should be brought to both the current market share of international visitors attracted to the western U.S. and goals as to how this market share can be increased in the future.

Tactic 2: Build linked offerings.

Similar to the regional intra-state collaboration in Tactic 1, new inter-state efforts should be pursued to create linked experiences across state borders, helping international visitors understand how they can put elements together to maximize their collective western U.S. experience.



4.3 Create Pillar

The Create Pillar focuses on increasing visitation through creation and branding of new traveler experiences through three objectives.

CREATE - OBJECTIVE 1 - EMBRACE “DESTINATION ARCHITECT” THINKING TO STIMULATE ECONOMIC DEVELOPMENT, ESPECIALLY IN RURAL COLORADO.

STRATEGY 1 - EXPAND CTO'S SUCCESSFUL CULTURAL, HERITAGE AND AGRITOURISM PROGRAM INTO A BROADER TOURISM DEVELOPMENT PROGRAM.

Tactic 1: Rename program and reconstitute board.

The CTO's Cultural, Heritage and Agritourism program has been an important achievement. It embraces many aspects of the Destination Architect role, as described in Section 3.2. This program and committee has great opportunity to build upon this success with a new focus on a broader mission of "Tourism Development." As part of this new focus, the committee's membership should be realigned to incorporate a diverse range of senior professionals representing key Colorado product sectors.

STRATEGY 2 - DEVELOP “HOW-TO” SUPPORT FOR DMOS TO INVENTORY, CONCEIVE AND BUILD LINKED EXPERIENCES.

Tactic 1: Develop product inventories.

Using a mix of resources, develop an inventory of key Colorado tourism products, grouped by both geographic areas and product theme. This inventory can be used as a resource in developing product categories and linked experiences.

Tactic 2: Launch Product-Development Working Groups.

Develop ongoing working groups, both at state and regional levels, that bring together top-level product representatives whose mission is to creatively identify and stimulate new product ideas. In some instances, this could be linking and integrating existing

resources in new, more powerful ways. Destination partners already are doing this with the Historic Hot Springs Loop, as well as new efforts to link and integrate Colorado's National Parks. These creative leaders have used "mental mortar" rather than "bricks and mortar" to craft new, more powerful products. In some instances, these working groups could identify and pursue new product concepts that are not present in Colorado, but could be synergistic with existing products.

Tactic 3: Provide technical skills training.

Many small companies desiring to start a tourism-related business need assistance on basic business-development issues, like defining the size of the market, understanding competitive realities or taking best-practice lessons from others. The CTO should create access to these types of materials and trainings to help stimulate proactive destination development thinking. The CTO can look to Travel Oregon and its Rural Tourism Studio as an example of building skills and capacity in earlier-stage destinations. Travel Oregon describes this effort as a "robust training program designed to assist rural communities in sustainable tourism development. Travel Oregon hopes the program will increase high-value, authentic experiences for travelers, thereby strengthening Oregon's position as a premier North American tourism destination."

STRATEGY 3 - PURSUE MORE RESOURCE FLEXIBILITY FOR DMOS.

Tactic 1: Redefine legal uses of DMO marketing resources.

For some DMOs in Colorado, current state law limits use of bed-tax resources to marketing activities only, thus limiting their ability to move into a Destination Architect role and proactively work on product development. The CTO should work in conjunction with these DMOs to refine legislative language to allow discretion and flexibility in how DMOs deploy their resources.

CREATE - OBJECTIVE 2 - CRAFT NEW INCENTIVE PROGRAMS TO STIMULATE PRODUCT DEVELOPMENT.

STRATEGY 1 - IDENTIFY AND DEVELOP LENDING SOURCES FOR TOURISM ENTREPRENEURSHIP.

Tactic 1: Create a centralized database of lending sources.

For many small tourism-related businesses, understanding the range of lending resources for a new business concept is difficult. By developing a centralized database of prospective entities, the CTO can provide an important resource to partners around the state.

Tactic 2: Identify lending source needs.

By working with other Colorado economic development entities to identify the key financing needs for tourism-related entrepreneurs, the CTO could provide an important head start for these businesses and generate development of more tourism-related businesses starts.

STRATEGY 2 - PURSUE RESOURCES FOR GRANTS TO SUPPORT NEW PRODUCT DEVELOPMENT.

Tactic 1: Pursue grant programs.

As additional CTO resources are secured in the future, tourism development efforts could benefit greatly from creation of a product development grant program. Grants could be directed at stimulating products that meet particular CTO goals, such as job creation, building community recovery or resiliency, sustainability, visitor dispersion or regional integration.

CREATE - OBJECTIVE 3 - CREATE PROGRAMS TO DEVELOP VISITOR READINESS AND HOSPITALITY SKILLS.

STRATEGY 1 - LAUNCH A “COLORADO CONCIERGE” HOSPITALITY PROGRAM THAT CONNECTS WITH FRONT-LINE WORKERS AND REINFORCES A UNIQUE BRAND OF COLORADO HOSPITALITY.

Tactic 1: Build hospitality skills.

Using a "Colorado Concierge" theme, the CTO should develop an online program to assist tourism partners statewide in deepening the hospitality skills of front-line workers. The program could incorporate ways of celebrating a uniquely Colorado-style welcome for visitors, using real-life examples from innovative businesses around the state. Program elements could be tailored to highlight regional attractions or to various international visitor segments.

Tactic 2: Integrate into the technical-skills program.

Along with an online version, key program elements also could be used in the technical-skills training program discussed in Objective 2.3 of this section.

STRATEGY 2 - DEVELOP A VISITOR QUALITY EXPERIENCE CERTIFICATION PROGRAM TO SET APPROPRIATE VISITOR EXPECTATIONS.

Tactic 1: Develop Certification Program.

Building on the Colorado Concierge program, the CTO should develop a Visitor Experience Certification Program to guide industry partners in creating positive visitor experiences. For example, an element of the program could provide certification for lodging properties to set visitor expectations at an appropriate level.



4.4 Steward Pillar

The Steward Pillar focuses on protecting the integrity of Colorado resources through sustainable tourism.

STEWARD - OBJECTIVE 1 - EMBRACE THINKING THAT DISPERSES VISITORS IN PRODUCTIVE WAYS.

STRATEGY 1 - ALIGN MARKETING STRATEGIES WITH CAPACITY FOR VISITORS.

Tactic 1: Identify at-risk assets.

An inventory of tourism-related products will be developed through tactics outlined as part of the Create Pillar. In consultation with federal and state agencies, including the National Park Service, the U.S. Forest Service, the Bureau of Land Management, the Office of Outdoor Recreation Industry, Colorado Parks and Wildlife, History Colorado and the Colorado Department of Transportation, this database could identify at-risk destination experiences. In conjunction with these entities, identify steps and initiatives that could lead to longer-range sustainability for those experiences.



Tactic 2: Develop and communicate alternatives.

Prioritize promotion of less at-risk travel experiences. Look to similar initiatives launched in other sensitive destinations, such as Sedona's Secret 7 program, which won a State of Arizona sustainability award. This initiative incorporated print and digital promotion of lesser-known Sedona-area destinations along seven thematic areas. It also provides recommendations on times to travel and was sensitive to vesting these areas. New initiatives should be tracked to evaluate their effectiveness in achieving goals.

Tactic 3: Look for ways to assist public-sector partners.

Many of Colorado's products are natural resource-based and managed by public-sector organizations, and funds to maintain these assets are often in short supply. DMOs and their private-sector partners should look for innovative ways to assist these partners. Again, inspiration can be found in Sedona, which used part of a product development grant for a match challenge to private-sector partners to create a \$250,000 trail-maintenance and upgrade fund. Through this efforts, the industry developed a closer working relationship with the Forest Service and enhanced recognition for shared sustainability goals.

STRATEGY 2 - CREATE RECOGNITION AND PRIZES FOR INNOVATIVE APPROACHES.

Tactic 1: Identify incentives.

Sustainability practices should be promoted through incentives, whether grants or co-op marketing opportunities, to encourage creative development of alternative products, experiences and itineraries that represent potential relief to high-traffic areas. One potential area of focus could be development of experiences aimed at reducing congestion on the I-25 and I-70 corridors by promoting other scenic drives that connect these assets.

Tactic 2: Investigate and develop recognition programs.

The CTO and industry should create recognition programs and public relations initiatives recognizing and rewarding regions and destinations that demonstrate success in promoting sustainable tourism practices. Such practices will reinforce and encourage efforts to embrace sustainable practices.

STEWARD - OBJECTIVE 2 - INVITE TRAVELERS TO EMBRACE COLORADANS' SUSTAINABILITY ETHIC WHILE IN COLORADO.

STRATEGY 1 - DEVELOP "VOLUNTOURISM" OPPORTUNITIES TO ADDRESS THE TOP NEEDS FOR MAINTENANCE OF NATURAL AND VISITOR RESOURCES.

Tactic 1: Develop and promote "voluntourism."

Through collaborative efforts with nonprofit advocacy groups as well as local, state and national agencies, originate and inventory programs that engage visitors and residents in activities that improve natural resources, reinforce sustainable practices and provide them with meaningful and memorable Colorado experiences.

STRATEGY 2 - INCREASE COLORADO VISITORS' EMBRACE OF SUSTAINABLE PRACTICES.

Tactic 1: Connect sustainability and the Colorado experience.

Prioritize marketing and communication initiatives that elevate sustainability as a core element of the Colorado experience. Identify suggested practices and encourage active involvement and participation in embracing these principles while in Colorado to "travel like a local." Promote and market visitor engagement through these practices and all other sustainable initiatives that demonstrate Colorado as a leader in protecting its core attractions and the future of the destination.

Tactic 2: Highlight real-world examples.

Showcase actual Colorado visitors embracing sustainable practices and use first-person voices to reinforce why they applying these practices.

STEWARD - OBJECTIVE 3 - CREATE ALLIANCES WITH OTHER STAKEHOLDERS TO MAGNIFY IMPACT OF SUSTAINABLE TOURISM INITIATIVES.

STRATEGY 1 - DEVELOP AND COMMUNICATE A SHARED MESSAGE.

Tactic 1: Establish messaging to inspire travelers to embrace sustainable tourism practices.

Establish credibility around a unified message to Colorado visitors through partnerships that will create a consistent message for visitors, starting with the time they begin planning a trip and that is reinforced throughout their travels.

STRATEGY 2 - BUILD COLLABORATION AROUND SUSTAINABLE TOURISM PRACTICES.

Tactic 1: Establish shared goals with both government and nonprofit partners.

To ensure alignment with other sustainability efforts, the CTO and industry partners should identify shared goals with both government and nonprofit partners that have sustainability as part of their mission. By combining inter-agency efforts, these initiatives will be reinforced and enhanced.



4.5 Advocate Pillar

The Advocate Pillar is oriented toward communicating the power of tourism and its ability to drive both economic and lifestyle benefits.

ADVOCATE - OBJECTIVE 1 - BUILD AN EFFECTIVE ADVOCACY PLATFORM.

STRATEGY 1 - UNITE INDUSTRY INTERESTS UNDER TIAC TO CARRY A UNIFIED VOICE FOR TOURISM TO ELECTED OFFICIALS.

Tactic 1: Build support for a competitive Colorado Tourism Office budget.

Utilize the collective power of TIAC's leadership to educate, articulate and advocate for competitive funding models that advance the sustainability of the CTO budget. Consider developing a "legislative buddy system" and assign primary communication responsibility on a county-by-county basis to industry leaders within each county.

Tactic 2 : Invest in advocacy on an ongoing basis.

Use the advocacy team to maintain ongoing influence in the legislative process in both the state and local platforms and be prepared to engage on any issue that favorably or unfavorably impacts the tourism and hospitality industry. Build an annual legislative agenda and engage in discussions that advance the industry and Colorado's competitive position. Maintain regular outreach to decision makers and avoid reactionary efforts in times of budget crises; build relationships that include support for individual decision-makers and legislators on issues that may affect infrastructure and other indirect matters that may advance tourism.

Tactic 3: Maximize the "Advocacy of Citizenry" to engage Colorado residents and industry workers in supporting tourism.

Integrate and engage residents through the in-state marketing initiatives discussed in the Create Pillar. Enlist residents who actively embrace regional travel experiences in support for the maintenance and sustainability of these experiences utilizing both on- and off-line resources. Expand the communication platform to speak specifically to residents

who are employed in the tourism and hospitality industry. Engage these employees as active participants in communication efforts to educate leaders on the importance of tourism growth and development. Build anecdotal approaches to put a face on the industry through industry employees and their personal stories. Consider collection of employee addresses and overlay on legislative districts; demonstrate the impact of tourism employment to elected leaders within their own districts. Support a separate communications plan to engage these employees on any issue within the industry's legislative action plan.

STRATEGY 2 - BUILD A COMPREHENSIVE COLORADO TOURISM "STORY."

Tactic 1: Assemble the advocacy team.

Bring together all industry-related associations whose businesses and individuals rely on the tourism industry for their livelihood. Establish, through CADMO and TIAC, the grassroots of the industry and motivate their active involvement in telling the "story." The industry-advocacy platform should be assembled to coordinate public education, to build strong communication linkages with elected officials and to address regulatory intrusion that inhibits one or more industry categories. Moreover, the advocacy team, with participation from CTO, should lead the effort to stabilize and sustain a competitive funding model for CTO that advances its competitive position and protects the integrity and sustainability of Colorado's unique natural resources and other products.

Tactic 2: Develop the communications plan.

Assemble public relations and communications professionals from across all industry segments; form a planning group to develop messaging and processes to deliver content across all disciplines and distribution channels extolling the benefits of tourism to the state's economy and quality of life. Consider all social channels and build a direct contact system by county to reach all legislators throughout the state. Consider an inexpensive, viral campaign (similar to Florida's "Share a Little Sunshine" campaign) that tells the story, addressing the positive benefits on jobs and revenue, and importantly, the tax implications and quality-of-life components impacting residents.

STRATEGY 3 - DEVELOP A RESEARCH-BASED UNDERSTANDING OF THE IMPACT OF TOURISM.

Tactic 1: Expand economic story.

The tourism "story" is an integral and essential element in public understanding and, ultimately, the advocacy platform that will guide future efforts in gaining legislative support for CTO funding. The economics of the industry and its impacts on the state and its residents is the first chapter of the "story." Understanding the breadth of economic impacts on local and state tax revenues, jobs, local business impacts and ROI implications

are the starting points. Expanding the fiscal implications and translating these data to a corresponding reduction in tax burden for Coloradans helps translate for residents the value of the state's investment in the CTO.

Tactic 2: Supplement with anecdotal quality-of-life enhancements.

The economic story must be further translated to include the broad range of ways tourism impacts Colorado, whether in residents' quality of life or raising the overall destination profile of Colorado. Examples of areas to focus on:

- ▶ In the absence of visitor spending, how many fine-dining establishments would exist in Colorado Springs, Denver or elsewhere in the state?
- ▶ How would the quality of recreational activities like the ski industry be sustained, developed and maintained without visitor spending?
- ▶ Would Colorado's many quality cultural institutions be able to offer the diversity of arts and entertainment activities enjoyed by residents without visitor spending?
- ▶ Retail establishments of all types rely on spending from visitors who generate their income from outside the state, and their in-state spending generates significant tax revenue that supports schools and all other essential public services, essentially subsidizing residents' tax bill.

Building this "story" and the associated messaging is the first key step to support the communications plan.

Tactic 3: Undertake research to measure the attitudes of both political leaders and the public toward tourism.

Utilize a variety of research methodology to establish a baseline on the public attitude related to the tourism industry. Include survey elements that capture political leadership and citizen impressions of Colorado tourism products and experiences and link the Colorado lifestyle to the importance of maintaining and sustaining these assets.

Commit to ongoing survey updates to measure the changes in attitudes and the understanding of the tourism industry and its contribution to the Colorado quality of life.

ADVOCATE - OBJECTIVE 2 - DEVELOP SUSTAINABLE FUNDING TO GROW AND PROTECT COLORADO'S COMPETITIVE POSITION.

STRATEGY 1 - RESEARCH POTENTIAL VIABLE FUNDING MODELS FOR THE CTO.

Tactic 1: Identify the options.

Initiate survey and other research approaches to collect data on the existing funding models for state tourism offices and other Destination Marketing Organizations across the U.S. Use the US Travel and DMAI databases to garner an understanding of existing models and then assess the feasibility

of funding options that offer the greatest potential for the State of Colorado. Seek options that align with industry participation and performance-based incentives; use the assembled advocacy team to assist in the evaluation of these options.

Tactic 2: Seek consensus and develop an action plan.

Once the research and analysis on optional funding models is achieved, begin to pursue legislative support and understanding by focusing on direct benefits to the state and within different regions of the state as supported by the model.

STRATEGY 2 – DEMONSTRATE POTENTIAL OF NEW RESOURCES.

Tactic 1: Identify needs based on a review of programmatic options not currently funded.

Develop a new resource-deployment approach that aligns unfunded critical program requirements with potential new resources. Based on available research and past performance data, build performance expectations and establish estimates of new economic returns to the state. Align these returns with benefits that are accrued to the residents in the state by reduced tax liability and sustainability outcomes affecting the product experiences in the state that residents value and utilize.

ADVOCATE – OBJECTIVE 3 – SUPPORT DEVELOPMENT OF CRITICAL INFRASTRUCTURE TO SUPPORT HEALTH OF TOURISM ECONOMY.

STRATEGY 1 – ADVOCATE FOR AIR-SERVICE ENHANCEMENTS IN PARTNERSHIP WITH DENVER INTERNATIONAL AIRPORT, AS WELL AS REGIONAL AIRPORTS.

Tactic 1: Build air-service coalitions.

Take full advantage of statewide and regional product-development working groups to strengthen the advocacy efforts and develop working relationships with regional airlines to introduce the value of increased service to Colorado's airports. Develop private-public partnerships throughout the state and seek grant funding to help introduce and/or subsidize additional service through DIA. Take advantage of successful efforts in Oregon and Wyoming to support advocacy efforts and demonstrate potential.

Tactic 2: Establish regular intra-agency communication and planning meetings.

Establish regular outreach meetings among all other Colorado state agencies that directly interface with Colorado's transportation infrastructure and the state's natural attractions. Seek to educate agency leadership as to the important alignment between tourism, economic development, parks and wildlife, arts and culture, etc. Simultaneously engage all other vertical industry associations to expand the understanding and influence decision-making processes that promote the long-term viability of the visitor industry. Use tourism's "story" as a platform to build understanding and connections between agencies and the industry.

STRATEGY 2 – ADVOCATE FOR ENHANCEMENTS TO COLORADO HIGHWAY SYSTEMS, PARTICULARLY I-70 AND I-25 CORRIDORS.

Tactic 1: Support interstate and state highway improvements.

Utilize the established advocacy platform to engage with transportation officials, elected and business leaders seeking to address congestion and physical enhancements to the I-70 and I-25 corridors. Articulate the impact on the tourism economy favorably and unfavorably based on action planning pursued.

STRATEGY 3 – ADVOCATE FOR DEVELOPMENT AND MAINTENANCE OF ALTERNATIVE AND MULTIMODAL TRANSPORTATION SYSTEMS, PARTICULARLY CYCLING.

Tactic 1: Research and pursue intermodal and multimodal options.

Utilizing a review of successful programs in other states and jurisdictions, initiate programming and pursue advocacy efforts to promote the use of alternative and multimodal transportation options within existing infrastructure. Align options with existing tourism-based assets and activities such as cycling.

Tactic 2: Position Colorado as a magnet for cycling-related travel.

With a focus on development of new trail infrastructure throughout Colorado, its history in creating the sport of mountain biking and the return of a major pro cycling event, Colorado has huge potential to build its reputation as a magnet for cycling enthusiasts. By joining with other state agencies, nonprofits, industry partners and related businesses, the CTO can build Colorado's reputation as a superlative place to experience cycling-based travel.





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