



Colorado Tourism Office: 2018 Regional Branding Initiative

Adopted by the Colorado Tourism Board on Sept. 26, 2018

DESTINATION

Think!

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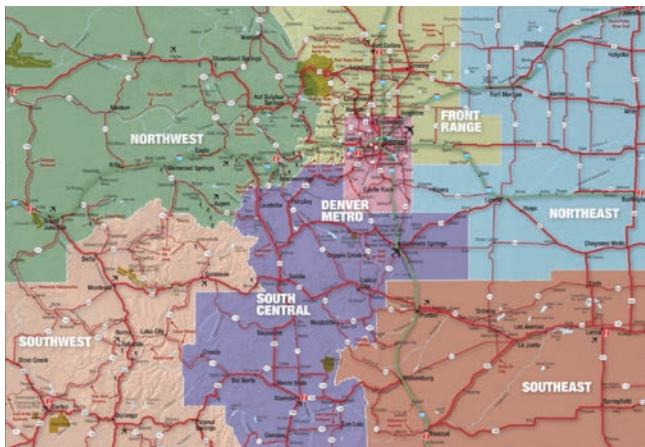
Introduction

Colorado has a unique ability to offer travelers diverse experiences in every corner of the state; yet existing regional boundaries have been ineffective in driving consumer awareness.

The seven travel regions created in the 1990s were one of the most consistent concerns voiced in more than 20 listening sessions held to develop the Colorado Tourism Roadmap in 2016.

Geographically defined regional areas, like Southeast or Northwest, did little to provide travelers with insight or provide tourism partners with effective assets and collaborative marketing opportunities. As a result, a recommendation was made in the Tourism Roadmap to take a fresh look at the regional structure.

By identifying and defining the unique qualities of each area of the state into cohesive regional identities, Colorado could build its tourism industry's competitive advantage. To do so, the Colorado Tourism Office formed the Regional Branding Task Force comprised of an 11-member committee with representation from across the state. The committee, co-chaired by Chris Romer, President and CEO of the Vail Valley Partnership, and Cathy Ritter, Director of the Colorado Tourism Office, assisted in guiding the development of the new travel regions.



Original map of the regions of Colorado

The Regional Branding Task Force

Co-chairs

Cathy Ritter

Colorado Tourism Office

Chris Romer

Vail Valley Partnership

Task Force Members

Justin Bresler

VISIT DENVER

Elizabeth Fogarty

Visit Grand Junction*

Pam Denahy

City of La Junta

Tom Kleinschnitz

Moffat County Tourism Association

Amy Long

Colorado Springs CVB

Jeff Owsley

Board Member, Alamosa CVB

Kat Papenbrock

Ouray Tourism Office

Kristine Rodine

Logan County Tourism Center

Katy Schneider

Visit Fort Collins

Colorado Tourism Office Contributors

Amber King

Kaiti Kacerovskis

Taren Mulch

**Formerly represented by Barbara Bowman*

Destination Think!, an international agency known for its insights into modern destination marketing including Place DNA™, place branding, destination promotion and destination development, was engaged to apply its experience and perspective to the Colorado Tourism Office at a critical juncture in Colorado's lifecycle as a tourism destination.

Led by Chief Strategist and Partner, William Bakker and, Senior Strategic Consultant, Sarah Prud'homme, the many years of experience with destinations around the world has given Destination Think! a proven strategy development process involving a comprehensive approach that progresses through research, analysis and validation to arrive at a final strategy.

The Colorado Tourism Office set out goals for the project which included:

- Defining new tourism regions that would allow Colorado to better promote distinct travel experiences across the state;
- Providing the local tourism industry with new insights and tools to stimulate marketing partnerships and collaborations;
- And repositioning Colorado's regions so that they would be both more useful to the travel industry and more desirable for travelers.

With these goals, Destination Think!'s research focused on:

- Identifying existing partnerships and regional branding to gain insight into current collaborations and how they could be improved upon;
- Examining Colorado's private sector partners and identifying which superlatives could serve as an anchor for more effective regional identities and marketing collaborations;
- Understanding how visitors travel in Colorado, including between various regions, and the seasonal impact on travel patterns and behavior; and
- Identifying the experiences, attractions and landmarks that draw consumers to visit and return to various parts of the state.

Together, Destination Think! and the Colorado Tourism Office's Regional Branding Task Force developed new regional brand identities founded upon Colorado's local visitor travel patterns, geography, topography, tourism groupings, and the seasonality of each region's offerings. This report details the research process conducted by Destination Think! and the results and recommendations which derived from the process.

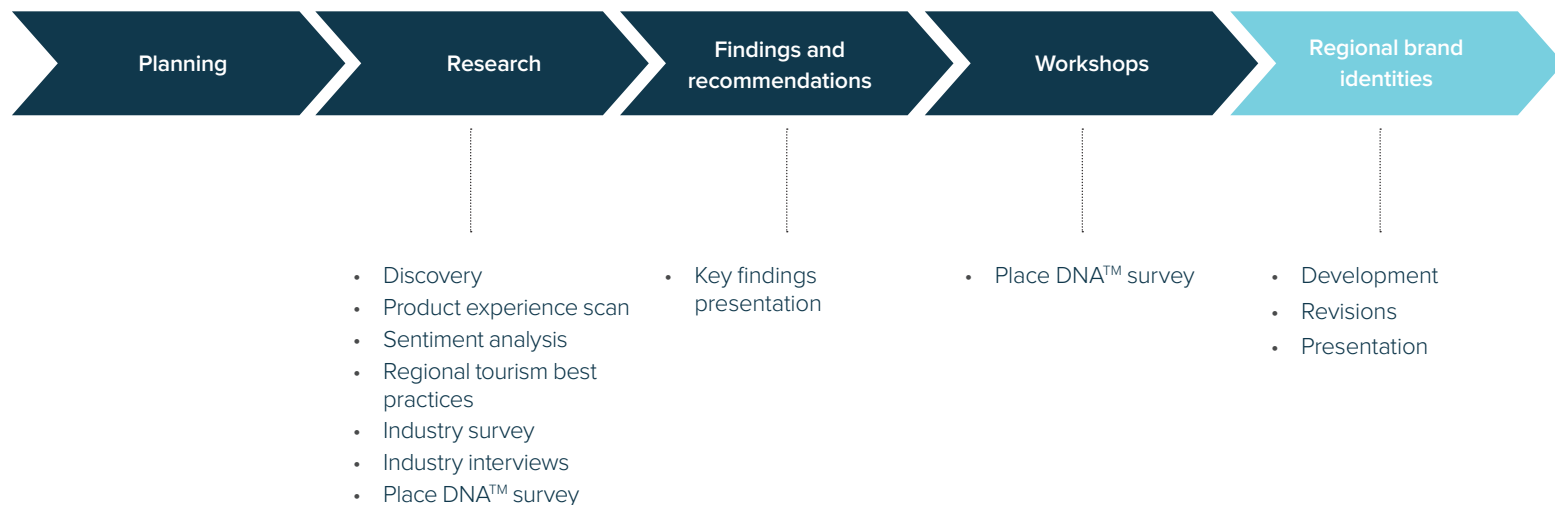


Methodology & Process

The future of tourism in Colorado depends on the entire tourism industry creating alignment through highly collaborative planning. As such, Destination Think!'s process was based on working closely with the Colorado Tourism Office and gaining insights from local tourism partners, including residents and visitors.

With input from stakeholders and the wider community, Destination Think! helped Colorado uncover its Place DNA™, a proprietary methodology to identify the unique attributes of a place, define its unique identity and identify any gaps between how visitors perceive the state and how residents talk about their community.

Implementing a research-driven process, Destination Think! first built an essential understanding of who the key stakeholders were and how to best engage the task force. Together, they'd be able to gain deeper insights into each region and its partners.



Research

Destination Think's proven, comprehensive qualitative and quantitative approach ensures that an inclusive perspective sets the foundation for new, data-driven brand identities and future marketing collaborations.

Discovery

In the discovery phase, Destination Think! reviewed over 50 documents and background materials such as the *2017 Colorado Tourism Roadmap* but also local marketing plans, tourism development plans, marketing programs, consumer research and economic impact studies to get a true grasp of Colorado's tourism industry, current regional identities and the intended direction for the Colorado Tourism Office. Destination Think! then used this preliminary information as a springboard for further research into the history, culture and other attributes of Colorado and its regions.

Place DNA™ Survey

To gather new information, Destination Think! surveyed a relevant sample of 1,240 Colorado residents for their opinions. The Place DNA™ survey, a quantitative assessment of the attributes locals deem important, ensures that the new regional identities resonate with local perspectives, create loyal brand ambassadors and align visitors' experiences with future brand promises.



Reviewed
50+
Documents



Surveyed
1,240
Residents

Sentiment Analysis

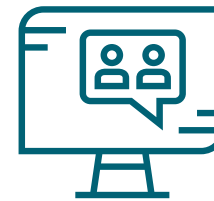
Destination Think! also evaluated consumer sentiment of 18,786,541 online conversations across key platforms like TripAdvisor, social media platforms, and popular or niche blogs, to better understand travelers' perceptions of Colorado and clustered regional experiences. This data, along with results from the product experience scan, helped Destination Think! identify key drivers for different regions from an experience perspective. This information provides a deep understanding of regional experiences, patterns in how and why travelers see the state, as well as the relationship between travelers and Colorado's tourism experiences.

Product Experience Scan

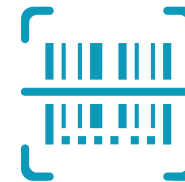
With input from the Colorado Tourism Office and its Regional Branding Task Force, Destination Think! conducted a product experience scan to create an inventory of the state's top experiences and attractions. Mapping Colorado's strongest drivers of tourism against its geography clearly exposed any potential commonalities between regions. Ultimately, the data revealed opportunities for collaboration around related offerings.

Industry Survey

To further engage stakeholders, Destination Think! developed an online survey aimed at members of Colorado's tourism industry. The 291 responses identified which collaborations, including private sector partnerships, worked well and which needed to be improved. The responses also identified which regional aspects industry partners deemed the most important for creating new identities and marketing initiatives. In addition to providing insight around existing partnerships, this method helped align stakeholders and earn support for a new brand strategy.



Analyzed
18,786,541
Online conversations



Conducted
50 Product Scans
Inventorizing
Top Attractions



Surveyed online
291
Industry Members

Industry Interviews

Destination Think! expanded on the Industry Survey by conducting interviews with more than 20 local influential DMOs and stakeholders. These interviews provided greater understanding around existing multi-partner, regional marketing collaborations and industry insights necessary for key recommendations.

Arrivalist Visitor Travel Patterns

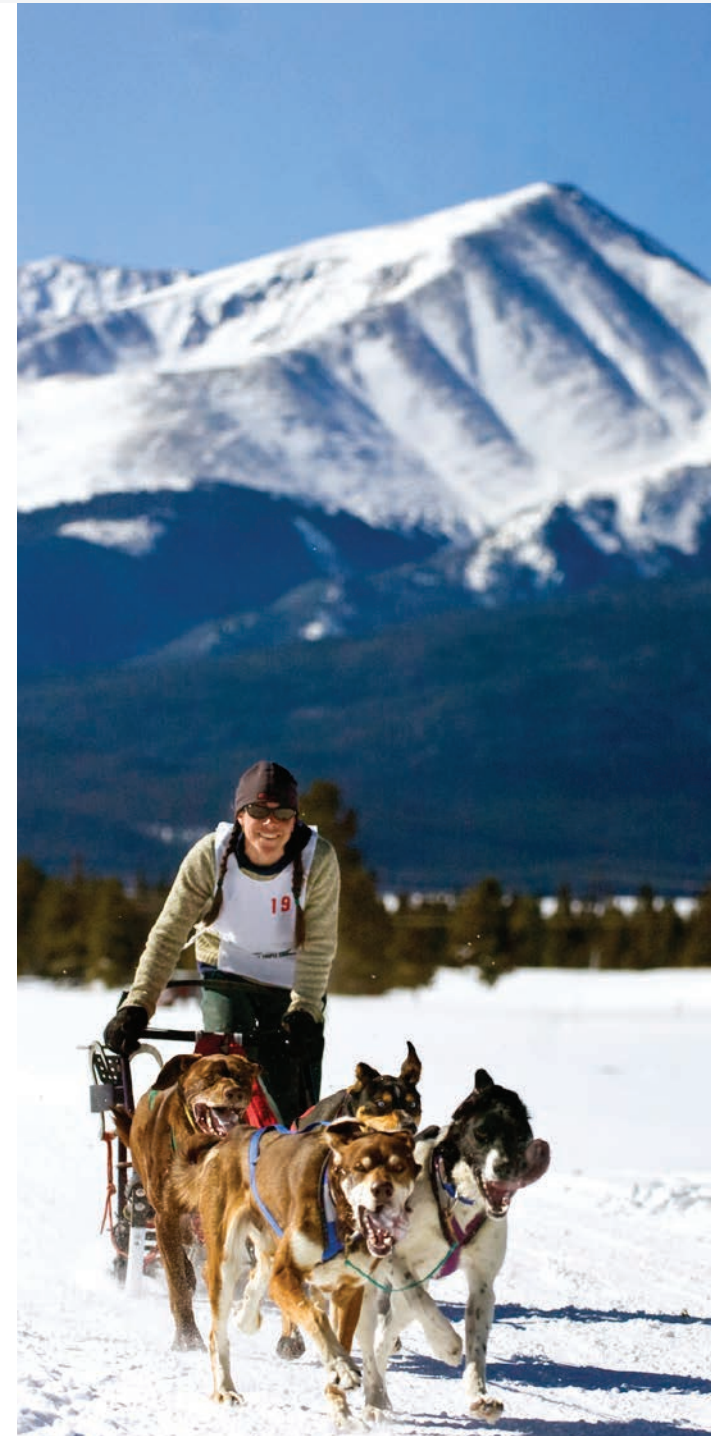
Arrivalist is a provider of data analysis of traveler behavior by anonymously tracking the location of a user's mobile device. Destination Think! analyzed the data of hundreds of thousands of visitors by identifying common clusters of counties visitors travel through, where visitors arrive, and the typical travel corridors during trips. This data allowed Destination Think! to establish regions that align with existing travel patterns.



Interviewed
20+
Statewide
Stakeholders



Analyzed
100,000
Data Patterns



Findings & Recommendations

Using the extensive qualitative and quantitative data, Destination Think! proposed new regional boundaries, with rationale, that could be used to create more authentic brand identities.

Destination Think! then launched 20 statewide Place DNA™ workshops to validate the proposed regions among residents and industry stakeholders. Over the course of two weeks, Destination Think! brought together a cross-section of industry representatives and residents from the newly proposed regional communities to gauge their level of understanding and support.



Conducted
20
Statewide
Workshops



50
Workshop
participants

Validation Workshops

Each workshop ran for four hours and engaged a maximum of 50 participants in a series of thought-provoking exercises and education about modern destination branding. Destination Think! leveraged the output of the Place DNA™ workshops to develop brand identities that accurately depicted each region and refined proposed regional boundaries.

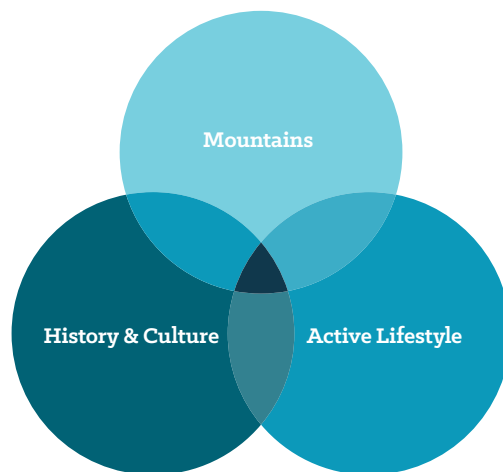


Validation workshop in Denver

Regional Brand Identities

With support from local residents and industry stakeholders, Destination Think! crafted identities built upon the unique identity and passionate communities that flow naturally from each place.

Each identity uses Place DNA™ elements, including geography, infrastructure, authenticity, continuity and community. The regional identity also includes a unique name, a thoughtful description of its appeal and recommendations for establishing the new regional brand as a platform.



Consumer Brand Identity Validation Survey

To further substantiate the new regions, Destination Think! distributed a survey to approximately 300,000 consumers in target markets, both in-state and across the rest of the US, based on a database provided by the Colorado Tourism Office. Each region was tested with a custom audience of respondents that included both past and potential travelers. Destination Think! then segmented consumers based on experiences they'd shown interest in. This step validates the name of each region, its positioning statement and elicits feedback from consumers.

Final Regional Brand Identities

Destination Think! leveraged this feedback to fine-tune the regional brand identities and establish a foundation for regional collaboration on future promotions and product development.



Industry Context

The tourism industry has gone through many changes over the last two decades. Technology has shifted consumer preferences and behaviors. Access to information used to be scarce, now there is an abundance. The authority of this information used to be in the hands of the tourism industry; it is now distributed across websites and social channels.

The middle class in emerging economies such as China, India and Russia have started to travel, enabling a wave of global growth in tourism. Competition for visitors is fierce as many places compete for tourism dollars in order to boost their economies.

Visitors used to be attracted by experiences specifically designed for tourists. Today, more and more visitors are looking for authentic experiences, often designed for locals. New online platforms, such as AirBnB, have created alternative options for visitors to feel like a local, while the internet makes it easy to avoid the tourist traps and find the places where locals hang out.

But, more visitors are looking for authenticity which is starting to impact quality of life and puts strains on environmental and cultural assets. This has resulted in a backlash of residents against tourists in popular places.

As a result, DMOs are shifting from just being destination promoters to destination managers. Instead of simply promoting what's there and looking for growth at all costs, DMOs need to understand the local attitude towards tourism and lead industry and other stakeholders to create a visitor economy that will result in success for the economy without compromising quality of life and natural and cultural assets. This balance will be different in every place.

When promoting their destinations, DMOs see traditional advertising methods losing their effectiveness. Reputation is built through word-of-mouth stories from visitors, residents and influencers instead. They tell relevant and credible stories about places in their own words, to their own networks. These messages are larger in volume and more credible with consumers.

A mediocre experience can't be mitigated with clever advertising. Instead, a cohesive destination story with remarkable experiences, told to the right audience will lead to word-of-mouth and social sharing. Only by rooting a brand in the reality of the experience can long-term success be achieved economically and also socially.

"Destination promotion happens through destination stories, told by many. And these stories are a direct result of the destination experience."

The Experience Economy

Pine and Gilmore's groundbreaking book "The Experience Economy" describes how the value of commodities increases by turning them into products.

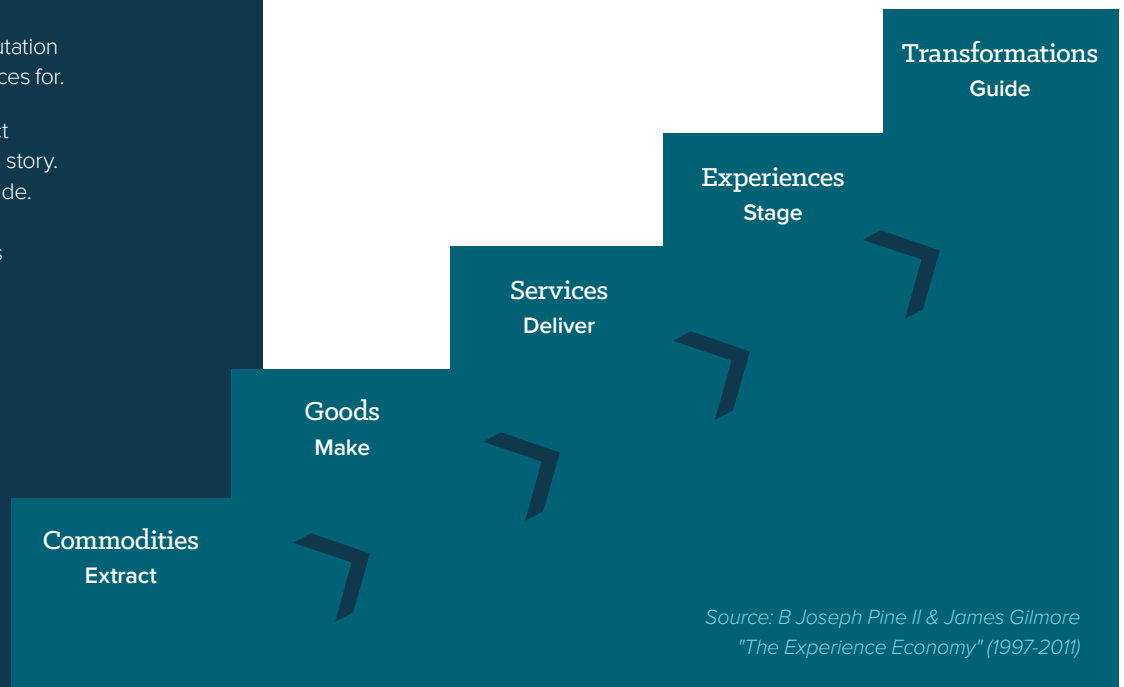
The value of products increases by turning them into services. And the value of services increases by turning them into experiences. This concept can be observed in many places and it's the reason why people are happy to pay much more for a cup of coffee at Starbucks.

Destinations that offer a unique experience can build a strong reputation with consumers who are willing to pay extra or travel longer distances for.

Local identity is typically the place to start turning common product into unique experiences that are aligned with a shared destination story. Skiing in Steamboat Springs is different from skiing in Vail or Telluride. Each resort offers a different experience that's rooted in the Place DNA™ of the community. This concept needs to be applied across the entire state of Colorado in order to create compelling and competitive offerings.



Many destinations offer high quality products but, without a unique experience, they will still have to compete on price if the experience isn't differentiated or unique.



Source: B Joseph Pine II & James Gilmore
"The Experience Economy" (1997-2011)

Tourism Regions

Virtually every country, state or province around the world that is the size of Colorado has tourism regions.

For consumers, regions are a meaningful way to break a large geographic area into more manageable parts when planning a trip. It helps to understand what experiences different parts of the state have to offer.

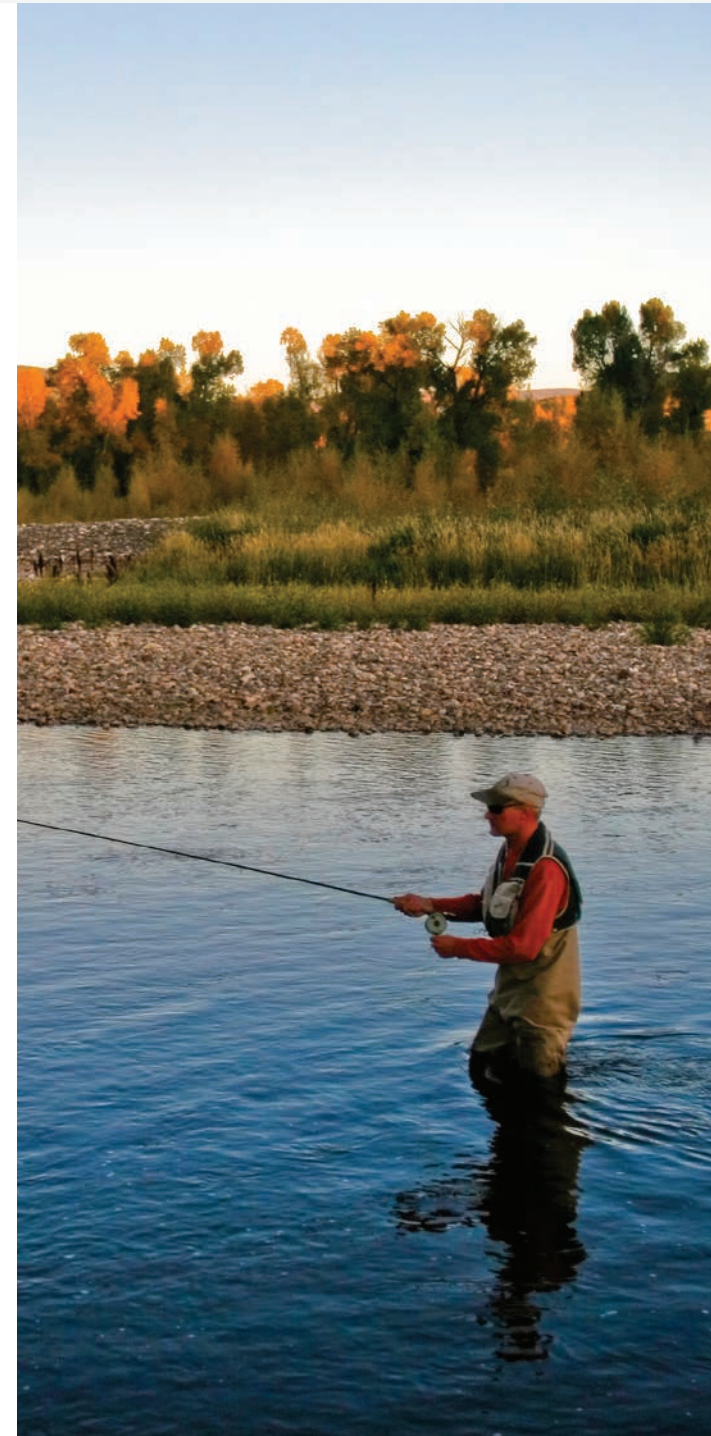
For statewide DMOs, it provides a meaningful way to match the right audiences with the right parts of the state, providing opportunities for growth and dispersion. It can also bring the DMO closer to the operators, especially when there is formalized, on the ground regional representation.

For the tourism industry, regions bring cities, towns and small communities together under a larger umbrella. Creating an aligned and cohesive experience and promoting these experiences creates a more compelling proposition to potential visitors, especially in parts of the state in the early stages of building a visitor economy.

There are countless approaches for creating and managing tourism regions. In most places, tourism regions have been around for decades and are well established. In some places, regions are formalized through regional DMOs with their own board and funding sources. They have created brands and actively promote them to consumers.

During the research phase of the project, most DMOs comparable to the Colorado Tourism Office warned against trying to establish stand-alone, regional consumer brands. Many have tried and few have succeeded. It's an expensive proposition to build a brand of something that's largely unknown and intangible. Instead, tourism regions are better suited later in the customer journey by helping visitors plan their experience and make sense of a large geographic area. It can lead to better alignment with individual preferences, increased length of stay, repeat visitation and dispersion across the state.

Regions are also the one of the most powerful tools for industry collaboration. By taking a broader view across many cities and towns, a region can serve as a unifier for consistent development and promotion. It can also serve as a leader and educator for industry.



Approach & Criteria to Establish New Regions

Colorado is geographically, historically and culturally diverse. Colorado is dominated by its geography, in particular the Rocky Mountains. It has large urban centers and small and remote villages. Ancient, pioneering and recent history colors the look and feel of many places. And, even though there are many elements that shape all parts of Colorado, every part of Colorado also has its own unique flavor.

Imagine someone on a road-biking tour across Colorado. As our rider visits the different parts of Colorado, things will look different geographically and architecturally; things will feel different from a climate perspective; things will taste different based on the local cuisine and conversations with locals will sound different based on the local culture.

The best opportunity for Colorado's regions is to give consumers the opportunity to visit a slice of Colorado's many identities. Each part of Colorado has a unique story to tell, providing the opportunity for collaboration to align stronger with this shared identity. Many tourism products are already affected by the identity of the place.

Regions provide the opportunity to package these unique identities into compelling stories that resonate with specific market segments. Based on people's passions, interests, values and demographics, we can connect them to the right part of Colorado.

For established areas of the state, there is an opportunity to strengthen reputation and find the unique flavor that avoids becoming generic and commoditized. For developing areas of the state, this means finding the right platform to start building reputation.



Approach & Criteria to Establish New Regions

Besides identity, there are other important considerations when developing tourism regions. In order to develop meaningful regional boundaries, Destination Think! established a total of eight Key Criteria in the development of new regional boundaries.

Even though these criteria can't always be met, it served as a guide to find the right balance between multiple factors.

Factor	What it means	Why it matters	Where idea originated
Common Identity or Unique Attribute Base	Each region should have a unique identity that flows from Place DNA™.	A destination's foundation intricately shapes the value proposition. It can solidify the experience and form the base for a unique brand story.	Place DNA™ Survey.
Respects Collaboration Networks	Regional boundaries should respect existing partnerships.	Collaboration is critical to leveraging resources and alignment. Even through regional boundaries aren't separated by walls, existing partnerships shouldn't be disrupted.	Discovery, Industry Survey and Interviews.
Established Routes & Access Points	Each region should have established routes and access points.	Accessibility is vital for visitors and residents to experience a region.	Discovery, Arrivist and Industry Survey.
Primary Attraction or Reason to Visit	Each region should have key travel-motivating (hero) experiences, or opportunities for development.	Travelers need a reason to visit in order to motivate them to take action.	Sentiment Research and Product Experience Scan.
Main Geographic Features & Distinction	Each region should respect geographic features and distinctions.	Natural environment is a key force in shaping a place, both geographically but also culturally.	Discovery, Industry Interviews and Industry Survey.
County Lines	Regional boundaries should follow county lines.	Counties are often tied to partnerships, funding and geography.	Discovery.
Travel Patterns	Regions should respect natural travel patterns.	Separation of two related or connected areas weakens their positioning.	Arrivist.
Maximum 3.5-hour Drive Time	Regions should take less than 3.5 hours to drive in one direction.	An average trip length of four nights limits how far visitors will travel in Colorado.	Google Maps.

Colorado's Place DNA™

Before understanding regional differences, it is important to understand the overarching identity that shapes Colorado.

Colorado is a unique state with spectacular landscapes, a rich and long history, diverse cultural experiences and home to passionate people. These characteristics, along with other attributes, make up the state's identity - its Place DNA™.

To provide an authentic experience, regions should leverage cohesive Colorado attributes to serve as the foundation for more localized themes. Alongside exclusive offerings, each region must also encompass the prevalent natural environment and the unique attributes beyond the outdoors that make Colorado extraordinary.



Environment

Colorado's environment includes its natural surroundings, landscape and resources. From the Plains and the Rockies to the San Luis Valley, Wyoming Basin and the Western Slope, topographical features define different aspects of the state's unique character. While six major environmental areas play a key role in naturally influencing Colorado's regional distinction, these boundaries themselves are too large to properly represent the diversity within them.



Infrastructure

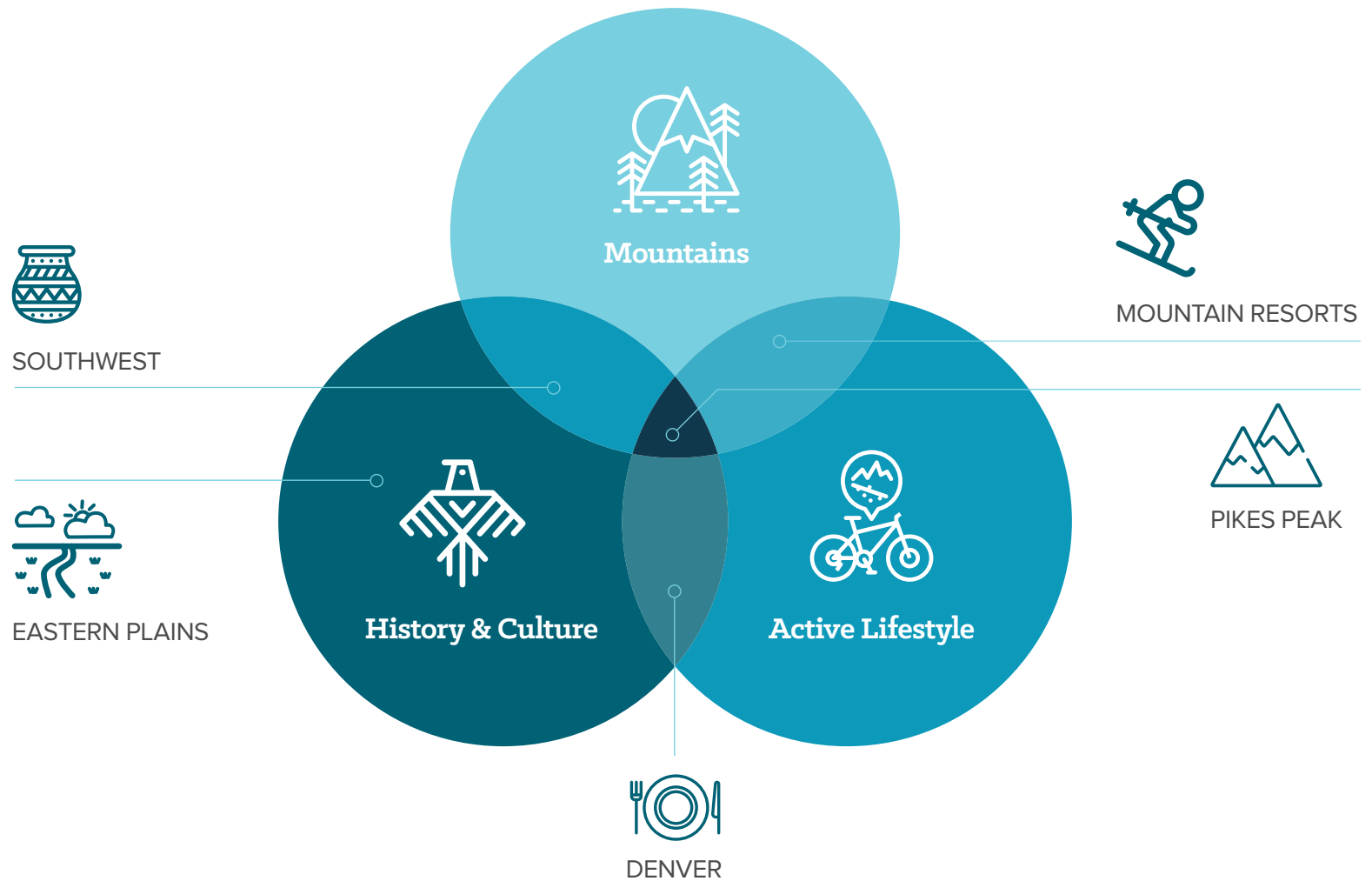
Colorado's infrastructure is made up of the human impact on its regions, including highway systems, which cities like Denver or Fort Collins and the economy subsequently created. Yet in Colorado, the development of infrastructure is heavily influenced by the climate and natural features that created challenges for builders. The travel patterns and behaviors within Colorado indicate that geography has strong influence on accessibility.



Society

Colorado's society has been forged through centuries of cultural evolution. Rooted in Native American traditions, European exploration and Mexican settlements, the state expanded through agriculture and the Gold Rush. Coupled with its history, Colorado's vast diversity in both natural and socio-political environments has given rise to many different cultural areas within the state.

Colorado's Place DNA™



Icons and regional references for illustration example purposes. Does not include all regions.

New Regional Map

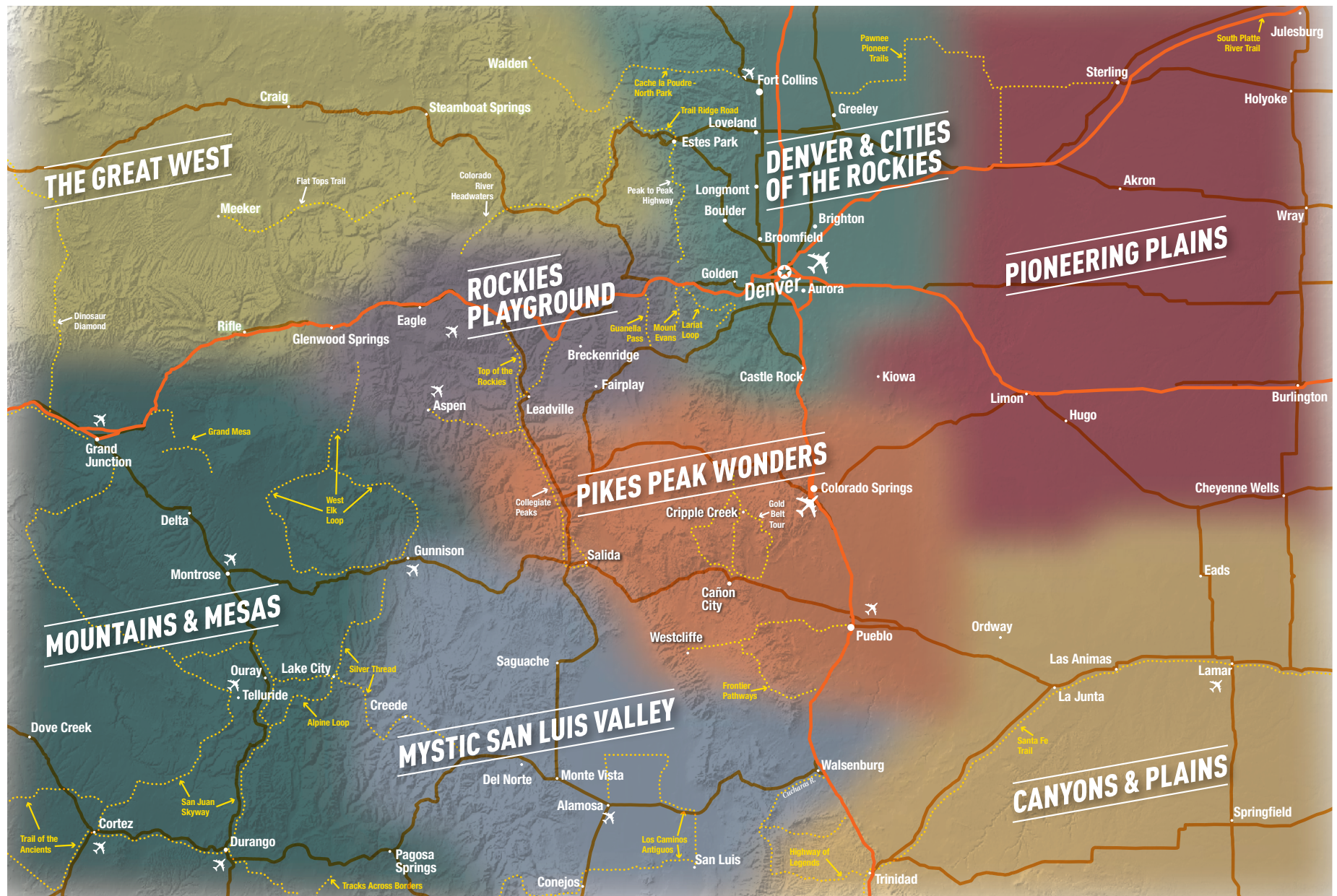
In addition to Place DNA™, Destination Think! also relied heavily on data to make decisions about where to develop boundaries. They incorporated the results of their comprehensive research and established key criteria to ensure that each newly defined region met the project objectives.

Using the criteria as requirements for each region, Destination Think! was able to develop new regional boundaries that were rooted in qualitative and quantitative research.

Divided into eight areas, the newly defined regions could accurately capture the distinct attributes and experiences available to travelers. In order to create the right names for the regions, Destination Think! established a best practice that was followed and validated with consumers.

The borders of the regions are intentionally blurry. The intent of the regional map is to create meaning for consumers and foster industry collaboration; hence the identity bleeds into different parts of the state. Regions are intended to encourage alignment and collaboration amongst the industry, based on common identity and resulting distinct market segments. It shouldn't result in competition amongst different parts of the state.





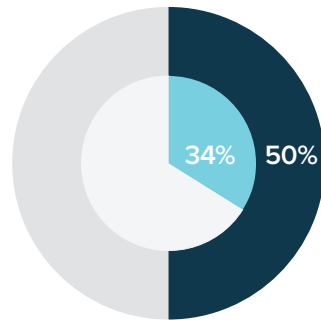
Consumer Validation Survey Results

The names of the new regions were validated through a consumer survey with in-state and out-of-state consumers. The regions and names overall polled very well with consumers. Lower numbers for some regions are primarily a reflection of their current reputation and maturity.

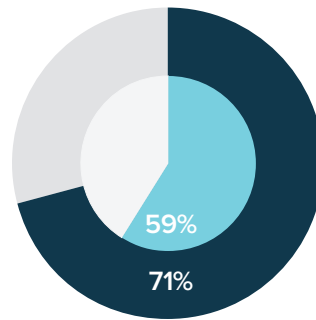
Based on this information, is this a region you would be interested in visiting or learning more about?

Percentage who answered yes:

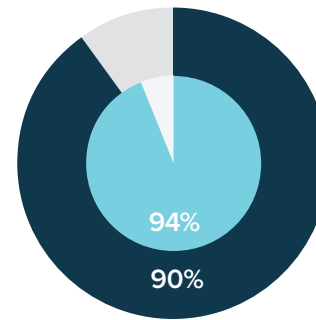
Out-of-state In-state



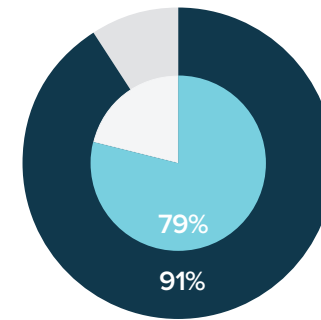
Pioneering Plains



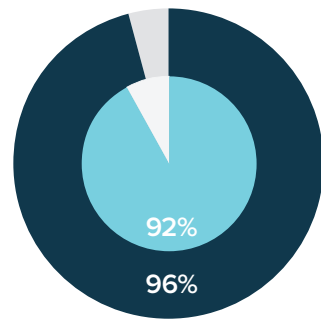
Canyons & Plains



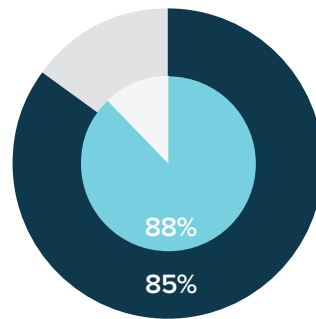
Pikes Peak Wonders



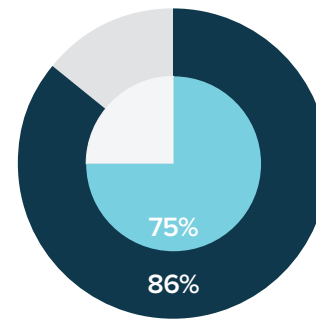
San Luis Valley



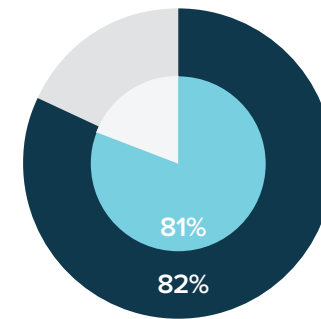
Mountains & Mesas



Rockies Playground



The Great West



Denver & Cities of the Rockies

Brand Framework

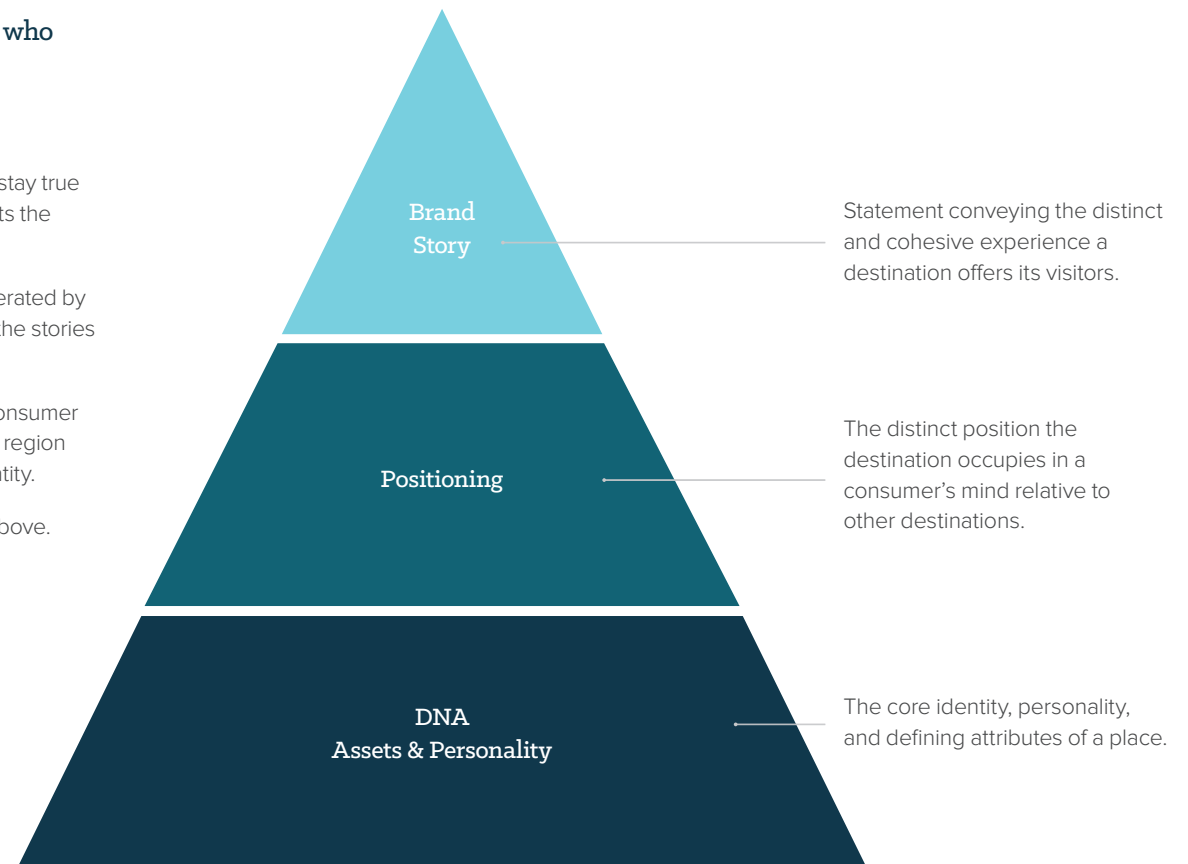
Our identity is not a choice; it's a representation of who we are. Our brand, however, is a choice; it's how we actively present our identity to the world.

By grounding our brand in our Place DNA™, we make sure to stay true to our identity while presenting ourselves in a way that attracts the right visitor.

A destination's brand is truly the sum of its parts. It is not generated by marketers, but shaped by both the experiences offered and the stories they hear about those experiences.

Because every interaction with a destination affects how a consumer perceives its brand, it is vital to understand what makes each region unique and ensure that the brand flows naturally from its identity.

The following regional brand frameworks are based on the above.



How the Regional Brand Identities Should be Used

**A brand is a living thing and it lives in the mind of the consumer.
That means a brand is unique and different for every visitor.**

A family with young children from Florida in the Winter will see Colorado differently from a mountain climber in the UK or a backpacker from China. This means that these regional brand identities should serve as a template to deepen the experience and communication for each defined audience group.

Building a true destination brand is a collective effort. Instead of leaving Colorado's brand to be owned and executed exclusively by a single organization, the following brand identities empower each region to embrace their unique attributes and contribute to a statewide destination story.

The regional brand identities were created to help guide, inspire and unite the Colorado Tourism Office, partners, individuals and businesses in a common vision that strengthens each region. As collective stories develop, each brand should serve as the compass that guides the communication and delivery behind the experiences.

These identities are a starting point. Individually, they are rooted in their local Place DNA™. Collectively, they are intended to complement each other for specific consumer segments, or tailor to a unique segment. They are not intended to foster competition between regions. Regional boundaries serve as a guide for consumers but shouldn't hinder collaboration or communication. Colorado is not a Disneyland theme park where the identity for every section of the park is neatly separated.



Ultimately, the framework developed for each region should:

01 Help deliver a unified destination experience.

The regional brand identities should serve as a means to strengthen the destination experience by creating common themes. This means that local DMOs, businesses and other stakeholders can find their alignment with the brand and incorporate it into the experience. This can happen explicitly or subtly.

The brand identity can also serve as a method for the development of new experiences or; strengthen existing ones by addressing challenges in the customer journey or; by designing experiences that turn consumers into raving fans and advocates of the region.

Every little piece of alignment will strengthen the brand. As Michael Eisner, former CEO of Disney once said, “A brand is a living entity – and it is enriched or undermined cumulatively over time; the product of a thousand small gestures.”

02 Inspire destination stories founded upon a common theme.

Just like the brand identity should create common themes through the experience, it should also serve as a theme in communications. Every local DMO, business and resident has a story to tell. And, the more alignment and consistency we create in these stories, the stronger brand perceptions will form in our target audiences.

03 Support creative consistency across communications and experiences.

The regional brand allows for the Colorado Tourism Office, regional DMOs and businesses to create creative consistency in their promotions in order to achieve a recognizable brand. In a perfect world, a consumer would understand what region a piece of communication belongs to based on the creative expression.

By aligning communications and experiences across all traveler touch points, each region has a powerful opportunity to create a strong, collective identity for their destination. While individuals or businesses that deliver an experience or a message about the region can tailor their materials, these identities should consistently inform the branding and messaging of every experience created and delivered in the region.

Even though the brand identities of the new tourism regions will be incorporated into the communications developed by the Colorado Tourism Office immediately, they should be seen as a long-term opportunity. Strengthening the experience and creating alignment won't happen overnight. The brand identities should evolve, deepen and become more and more defined for specific audience segments and relevant to individual businesses.

And, over time, they can become powerful platforms for building a robust visitor economy across the state, in alignment with the local identity. But, it is up to each region and its stakeholders to take advantage of the opportunity.

Regional Brand Identities

01

Pioneering Plains

02

Canyons & Plains

03

Pikes Peak Wonders

04

San Luis Valley

05

Mountains & Mesas

06

Rockies Playground

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The Great West

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Denver & Cities of the Rockies

REGION 1

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REGION 6

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REGION 8

REGION

01

Pioneering Plains



Introduction

Located in Northeastern Colorado, the Pioneering Plains are home to an arid, expansive landscape, marked by endless plains, grasslands and shallow canyons. Home to the Pawnee National Grassland, the region has seasons that swing between cold winters and hot, dry summers — the kind of climate ideal for a wide variety of birds and bountiful agriculture.

In this region, centennial farms, plots of fertile land that have belonged to the same family for more than 100 years, are commonplace. Founded in agriculture, the rural settlements that sprouted remain small, sparse and loosely connected, nestled into a gentle but thriving landscape. Here, the region's residents still carry the pioneering spirit that made this area vital to the Pony Express.

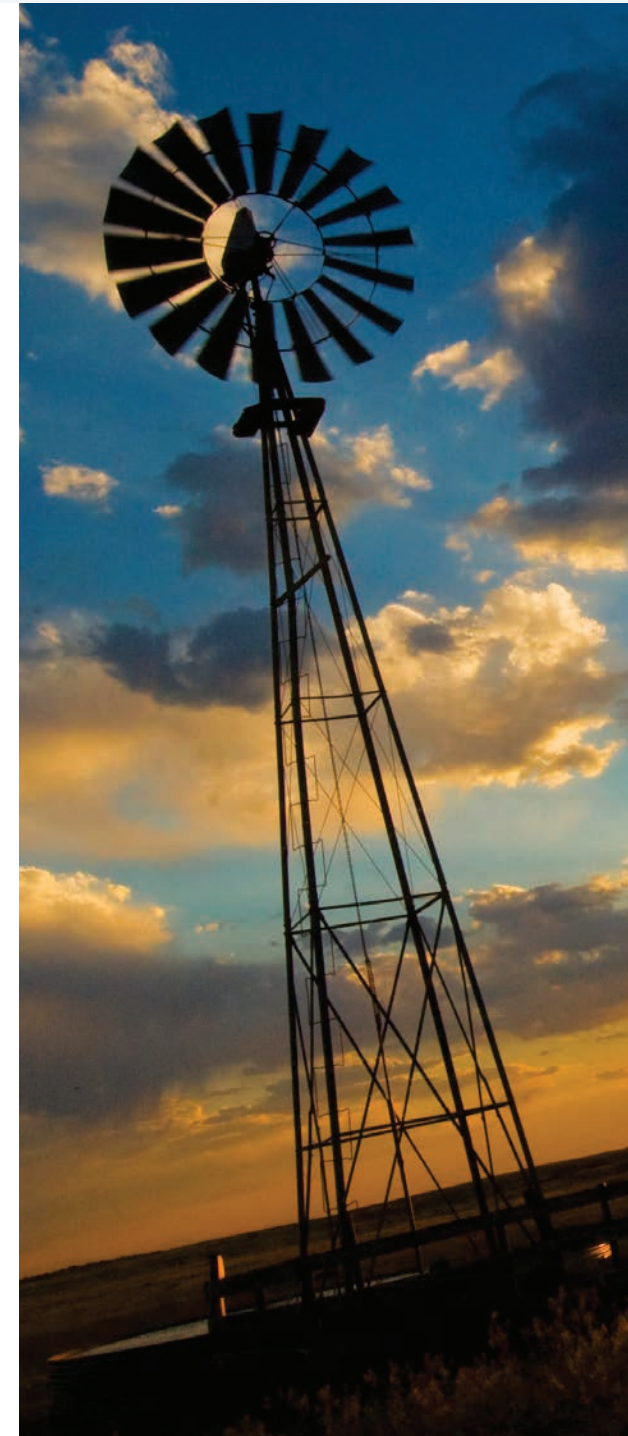
Though the steadfastness of the Plains may make it seem like change comes slowly here, this region is built upon an air of exploration. Its trailblazing history gave rise to a pioneering spirit that the locals feel define the region, according to the Place DNA™ survey. Because of this, the residents see the region as unspoiled, authentic and friendly. They are proud of the roots, planted by early settlers, that have thrived despite natural and manmade challenges in the region.

In interviews, industry partners acknowledged the difficulties created by the two highways that whiz visitors through the region with little awareness of the historic treasures they're passing up. There is an opportunity to collaborate to bring the right kind of visitor to the region deliberately, rather than focusing on those passing through. Alongside historical museums and a music festival in Wray, the residents of Karval take pride in hosting a festival to celebrate the Mountain Plover, a unique bird exclusive to the region.

In workshops, both local inhabitants and industry partners touted their rich human history and early railroad ties to covered wagons and cattle drives, and their present-day culture, including food and wind-energy production, as the cornerstones of an authentic glimpse into highly spirited, small-town life.

Here, the population's pioneering spirit is one of adventure, and it is alive and well in common outdoor activities like hunting, fishing and birding. These experiences keep the people close to the land and in touch with their hard-earned roots. Their centennial farms tie them to their deep ancestral lineage and keep their independent character free from outside imposition.

Ideal for travelers looking to rediscover their own sense of adventure, the Pioneering Plains offers unique, authentic and memorable experiences. But the future of tourism in the region is hinged on the potential for collaboration. Together, the townspeople can offer visitors a distinct experience unlike any other; one in which the reach of the Plains compares only to the depth of their heritage, the flavors of their produce, the hunting and outdoor adventure opportunities and the variety of their wildlife.



Regional Profile: Pioneering Plains

Key Defining Attributes:



Supporting Attributes:

- Agriculture
- Authentic
- Birds
- Blue Collar
- Centennial Farmland
- Grassland
- Highways
- Humble
- Understated
- Hunting
- Livestock (cows, horses)
- Myths & Legends
- Native American
- Pawnee National Park
- Pioneering History
- Pioneers
- Plains
- Pony Express
- Ranching
- Rural Culture
- Set in their ways
- Small Town
- Traditional
- Vast
- Western
- Wind Energy

Defining Attributes

DNA DRIVERS

- Our history
- Our plains and/or deserts
- Our unique way of life
- Our festivals and events
- Our parks

IDENTITY DRIVERS

- Rural
- Authentic
- Friendly
- Unspoiled
- Safe

DNA OVER-INDEXING

- Nothing

IDENTIFY DIFFERENCE FROM CO

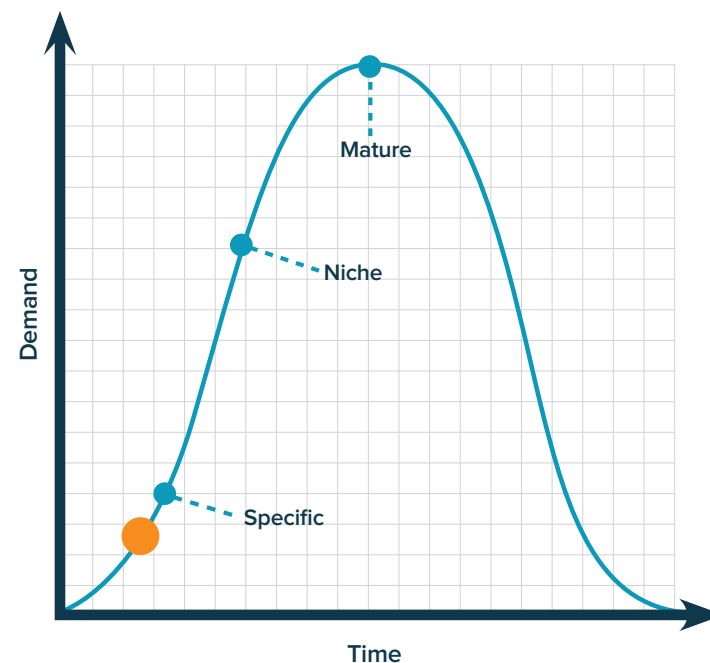
- Rural (+47%)
- Place of the past (+36%)
- Unspoiled (+35%)
- Conservative (+31%)
- Close-minded (+26%)

CONSUMER SENTIMENT DRIVERS

Sterling Museums

Wray Festivals

Destination Lifecycle



Visitor spending

\$193M

(1%)

*2017 Visitor Spending as provided by
The Colorado Tourism Office.*

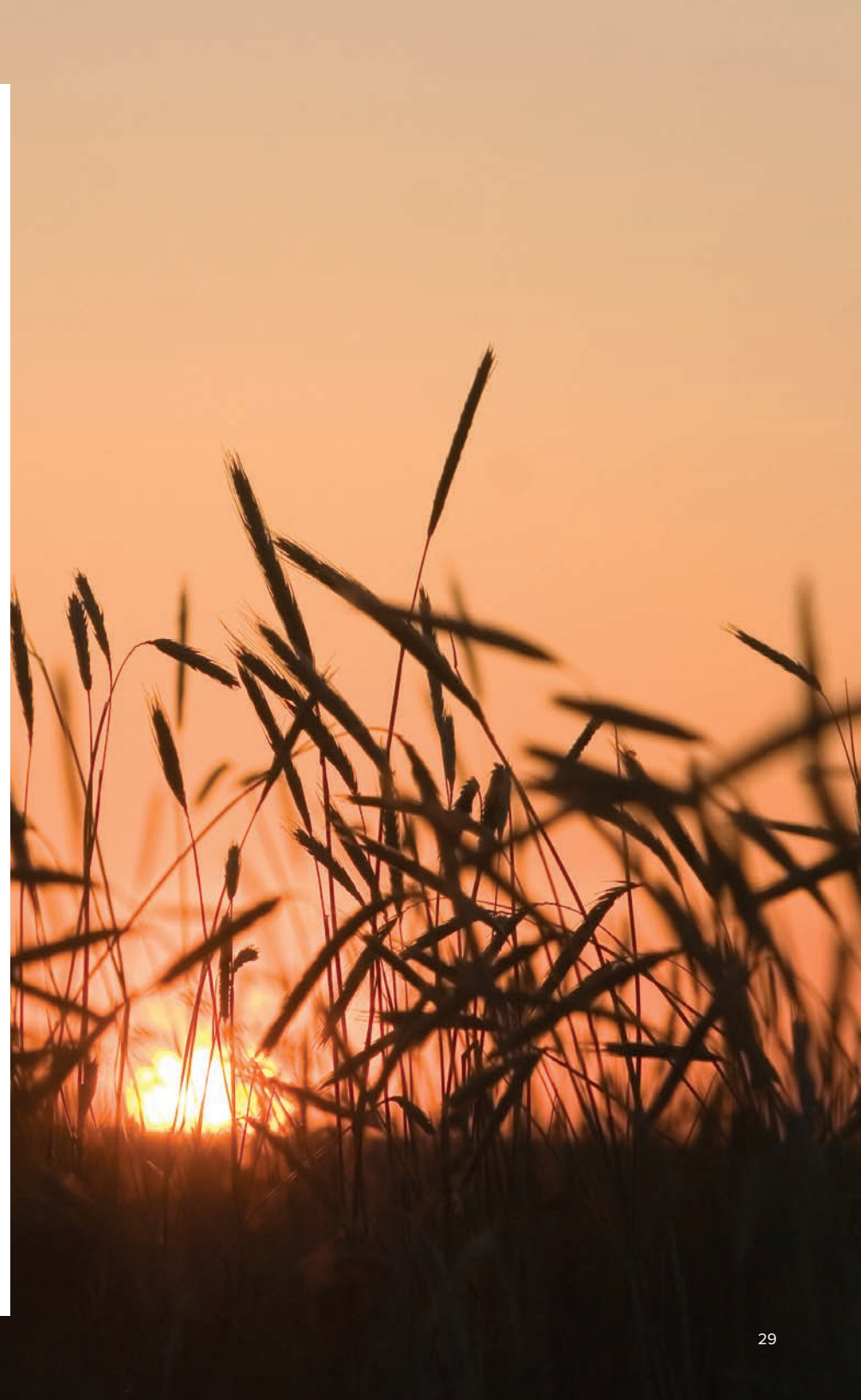


Positioning Statement

The Pioneering Plains, found in Northeastern Colorado, is a rural destination filled with traditional character and charm known for its pioneering spirit, robust hunting opportunities, and centennial farms that are rich in history.

The landscape features vast plains and grasslands, buttes and shallow canyons where visitors can enjoy a hike, visit a museum, shop for antiques, take in some arts and crafts, mingle with the locals at a nearby pub, or even spot a bird that is unique to the region.

It's the perfect destination for those who need to slow things down while enjoying the thrill of discovering unique, authentic and memorable experiences.





Brand Story

If life is calling for you to slow things down a little, be your own pioneer and mosey off the beaten track to discover the unique offerings of the Pioneering Plains.

It's a special destination tucked away in Northeastern Colorado, where the air is as pure as its people. Take a moment to feel your pulse slow down as you stare off into the endless plains and grasslands. Or go for a hike and explore the shallow canyons and stunning buttes in the area. Into birding or the thrill of hunting? There are plenty of opportunities that are unique to the region.

It's also a place with a pioneering spirit that is rich in history, where the farms have been passed down for generations, and where you can connect with the locals who are warm, genuine, and honor tradition.

The best part about the Pioneering Plains is that it's a place where you can do as little, or as much as you'd like. Choose your pace and create experiences that are authentic and truly memorable.





Recommendations

The Pioneering Plains region is an unexplored region of the state. Tourism product and experiences are largely based on travelers stopping for a rest along the main highways of I-70 and I-76. The region lacks a distinct or iconic tourism driver but there are opportunities for niche audiences.

For visitors with an interest in history and soaking up a unique local culture, the region offers a connection to Colorado's pioneering history, accessible through the local culture, places of historic significance and centennial farms passed down by many generations. For birders, the region offers a plethora of unique species, especially at the Pawnee National Grassland. The Mountain Plover festival in Karval is a good example of experience development for the birding niche.

The Pioneering Plains region is in the very early stages of the destination lifecycle. Therefore, the focus over the next few years should be on destination development, through the niche opportunities mentioned above. Growth should come from building reputation in these audiences, which will lead to the development of additional experiences and capacity.



DESTINATION THINK!'S RECOMMENDATIONS FOR THIS REGION MOVING FORWARD ARE:

01

Focus should be approximately 70% on destination development, 30% on promotion.

Benefiting from a visitor economy for the Pioneering Plains isn't a matter of promotion. To reach its potential, it needs a focus on development. In the upcoming years, this is where the energy and funds should be spent. The remaining 30% can go towards building reputation, with a focus on the right visitor who is likely to recommend the region to their friends.

02

Create a destination development plan based on regional identity: *pioneering spirit*.

The Pioneering Plains regions needs a growth plan. This needs to include building demand, but before meaningful demand can be created, work needs to happen on the supply side to make this region tourism ready. This includes alignment of tourism product with the brand story.

03

Establish a stakeholder-led regional brand committee.

The regional brand and identity should be handed over to a team of regional stakeholders who can lead and use this as a tool to move this region forward. By aligning stakeholders, they can work together to deepen the brand story, making it relevant to niche audiences and determining what the best way is to inject the pioneering spirit in the tourism product.

04

Build a niche marketing plan (start with one niche).

You can't be all things to all people. And, for the Pioneering Plains region, it would be a big step to resonate even with some people. This needs to happen through niche marketing. A big part of a regional plan needs to be building reputation by aligning with one niche and tailoring the experience to it.

05

Grow and foster collaboration between stakeholders.

More than any region, the Pioneering Plains need to work through strength in collaboration and alignment. There are opportunities and challenges to overcome, but it will need commitment from many stakeholders, inside and outside the tourism industry to realize it.



REGION
02

Canyons &
Plains



Introduction

The Canyons & Plains region lies in Southeast Colorado, an area defined by its grassy plains, buttes, and shallow canyons. Here the arid landscape is vast and sprawling, with dry summers and cold winters, an ideal location for birds, bird watchers, and agricultural production. Dotted with rural communities and towns, the region boasts a quiet, traditional appeal.

Home to the historic Mexican-American trade route of the Santa Fe Trail, today it is connected by highways. This region's infrastructure, attractions, accommodations and amenities are limited. Once off the beaten path, travelers are greeted by dirt and gravel roads. This region is a place where it is the extra effort it can take to uncover the Native American, pioneer, and Hispanic heritage that makes it worthwhile.

Through the Place DNA™ Survey, residents identified the area is one of diversity, with strong cultural roots, as well as, authentic experiences. Without highly developed tourism infrastructure, locals see the area as real and raw; defined and anchored by its history and its rural, agricultural center that has kept growth and modernization to a minimum. Locals also revealed that they take pride in their slower pace of life, small-town feel, and salt-of-the-earth roots that make them modest and humble. And, although even the landscape appears relatively similar, residents find beauty in the subtle distinctions and the abundant wildlife that calls this region home.

This region, rooted in a rich Hispanic and Native American history, has a lot to offer the traveler willing to seek it out. Some of the most prominent attractions, including the Sante Fe Trail, the Sand Creek Massacre National Historic Site, and Camp Amanche, a Japanese -American internment camp, are home to the tragic and powerful foundations of the local people. Those seeking adventures in cultural history and broadening perspectives will find opportunity to learn from the people's past as well as their present.

The opportunity for the Canyons & Plains region lies in appealing to a specific type of traveler; one that is not looking for another city where they can go unnoticed, rather a wide open sky and a landscape fertilized with history and the opportunity to connect with the land. This region, where visitors can find themselves among prehistoric dinosaur tracks, the agricultural bounty of the land, and world-class bird watching experiences simultaneously, is ideal for those who take pleasure in the search for life's little treasures.



Regional Profile: Canyons & Plains

Key Defining Attributes:



Supporting Attributes:

- Agriculture
- Archeology
- Authentic
- Bent's Old Fort
- Birding
- Blue Collar
- Boggsville Historic Site
- Camp Amanche
- Canyons
- Comanche National Grassland
- Dustbowl
- Farmland
- Highways
- Hispanic Heritage
- Humble
- Hunting
- Livestock
- Myths & Legends
- Native American heritage
- Plains
- Ranching
- Rocky Ford Cantalopes
- Rural Culture
- Sand Creek Massacre National Historic Site
- Santa Fe Trail
- Small Towns
- Steadfast
- Traditional
- Vast
- Watermelons

Defining Attributes

DNA DRIVERS

- Lakes and rivers
- Climate
- History
- Plains and/or deserts
- Unique way of life

DNA OVER-INDEXING

- None

IDENTITY DRIVERS

- Diverse
- Authentic
- Place of the past
- Idle
- Blue collar

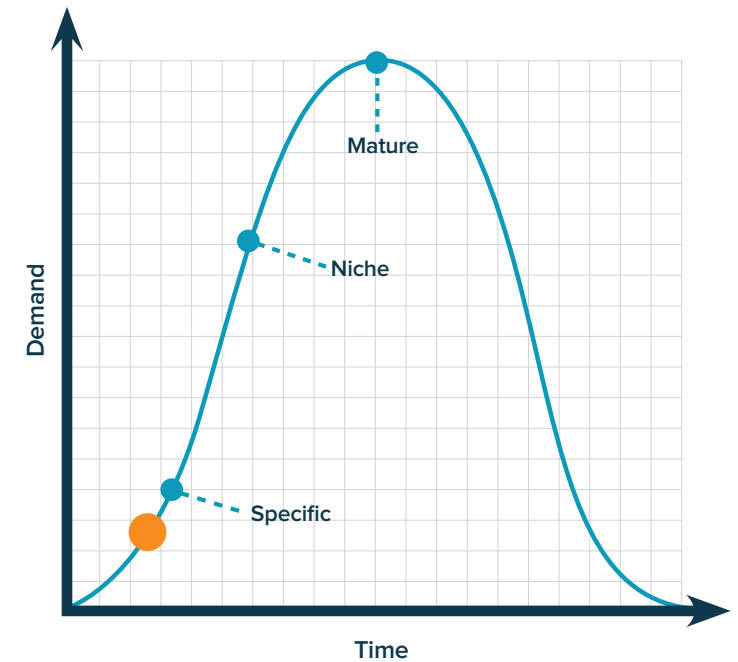
IDENTIFY DIFFERENCE FROM CO

- Idle (+42%)
- Place of the past (+41%)
- Rural (+30%)
- Ugly (+26%)
- Introvert (+23%)

CONSUMER SENTIMENT DRIVERS

Hiking + Trails, Wildlife Viewing, Entertainment, Nightlife

Destination Lifecycle



Visitor spending

\$91M

(>1%)

2017 Visitor Spending as provided by
The Colorado Tourism Office.



Positioning Statement

The Canyons & Plains region, found in Southeast Colorado, is a rural destination filled with traditional character, agricultural abundance, and shaped by its rich heritage of American, Hispanic and Native American history and culture.

Visitors can retrace the Santa Fe Trail through a landscape that features vast plains and grasslands, buttes and shallow canyons and connect with important history at Bent's Old Fort National Historic Site, Boggsville Historic Site, Camp Amache, or the Sand Creek Massacre National Historic Site along the way. On the Comanche National Grassland, visitors can go back even further in time by exploring prehistoric dinosaur tracks and petroglyphs and is the perfect place to spot birds unique to the region. Historic experiences are complemented by charming burgeoning cultural and artistic hub of Trinidad.

Canyons & Plains is a special place where visitors go to enrich their perspective, take the road less traveled and experience fascinating moments in history, firsthand.





Brand Story

If you are drawn to places where there is more than meets the eye, be your own explorer as you uncover everything that the Canyon & Plains region has to offer. It's a steadfast place in Southeast Colorado where American, Native American, and Hispanic history and culture come to life.

Step back in time as you retrace the world-famous Santa Fe Trail, connect with pivotal moments in history, or get lost by taking the road less traveled to discover other authentic experiences. Connect with genuine locals at vibrant farmer's markets or by joining in on some favorite local pastimes like hiking, fishing, hunting, or bird watching.

It's time to broaden your perspective as you travel beyond the history books to connect with important parts of the nation's history and reconnect with the land.





Recommendations

The Canyons & Plains region is closely related to its cousin, the Pioneering Plains region. It is also an underexplored region of the State. Even though the region is early in the stages of the destination lifecycle, there are a lot of opportunities that can serve as a platform for development.

The region offers a unique local culture that is rooted in its history. Some with recognizable names like the Santa Fe Trail or the Dust Bowl. There is a lot of culture and important history, at times tragic, in this region worth uncovering. Complementing the region's distinct characteristics are farming experiences, agriculture, birding and attractions such as the dinosaur tracks and petroglyphs.

The Canyons & Plains region has a small foundation and strong opportunities. The name recognition of the Santa Fe Trail, with a unique story and experience, is a strong asset to start building upon, including a connection with the New Mexico side. Other experiences can support or, in some cases, stand on their own with niche audiences.



DESTINATION THINK!'S RECOMMENDATIONS FOR THIS REGION MOVING FORWARD ARE:**01**

Looking ahead, the focus should be approximately 70% on destination development and 30% on destination promotion.

The current state of the region includes some compelling individual products and experiences (including some towns). In order to turn the region into a cohesive experience, more development and alignment is needed.

02

Create a destination development plan based on the regional identity (Santa Fe Trail).

Even though the Santa Fe Trail doesn't cover all corners of the region, it's something that's distinct and can serve as a unifier and driver for visitation. The Santa Fe Trail is as much as an attitude, a desire for exploration, as it is a specific route.

03

Establish a stakeholder-led regional brand committee.

The regional brand and identity should be handed over to a team of regional stakeholders who use this as a tool to move this region forward and create alignment within the region. By deepening the brand story, it will create more opportunities to make it relevant to niche audiences and identify how any town and tourism operator can connect with the brand story in its own way.

04

Build a niche marketing plan (start with one niche).

The Canyons & Plains region offers some diverse experiences. But, for most visitors, they don't connect with a strong motivator. Building reputation for the Canyons & Plains region should start by packing up the experiences under one umbrella (the Santa Fe Trail) and, by focusing on one niche audience, that connects with the story.

05

Grow and foster collaboration between stakeholders.

The Canyons & Plains region's best bet for future success is strong alignment and support amongst stakeholders. The opportunities are there, but it will require commitment and cooperation. Without it, growth will be a challenge.



REGION

03

Pikes Peak Wonders



Introduction

Situated in central Colorado, this region serves as a junction with a blend between urban and outdoor lifestyles. Home to an environment where the Plains meet the Rockies, there is no shortage of striking natural features, from Pikes Peak and the Royal Gorge to the sweeping Colorado Plains.

Beyond geological wonders, the region contains the urban dwellings of both Pueblo and Colorado Springs, which lie on the Denver corridor and are served by the state's second busiest airport.

The infrastructure makes it easy for visitors to experience well-developed amenities, tours and resorts, all connected by a network of accessible highways and roads that pass through small towns and lead directly to the major attractions. Other features include a wide variety of local establishments, including military installations, cultural museums and the US Olympic Committee headquarters as well as nearly two dozen National Governing Bodies of sport, which makes the Pikes Peak Wonders region home to a population as diverse as the landscape.

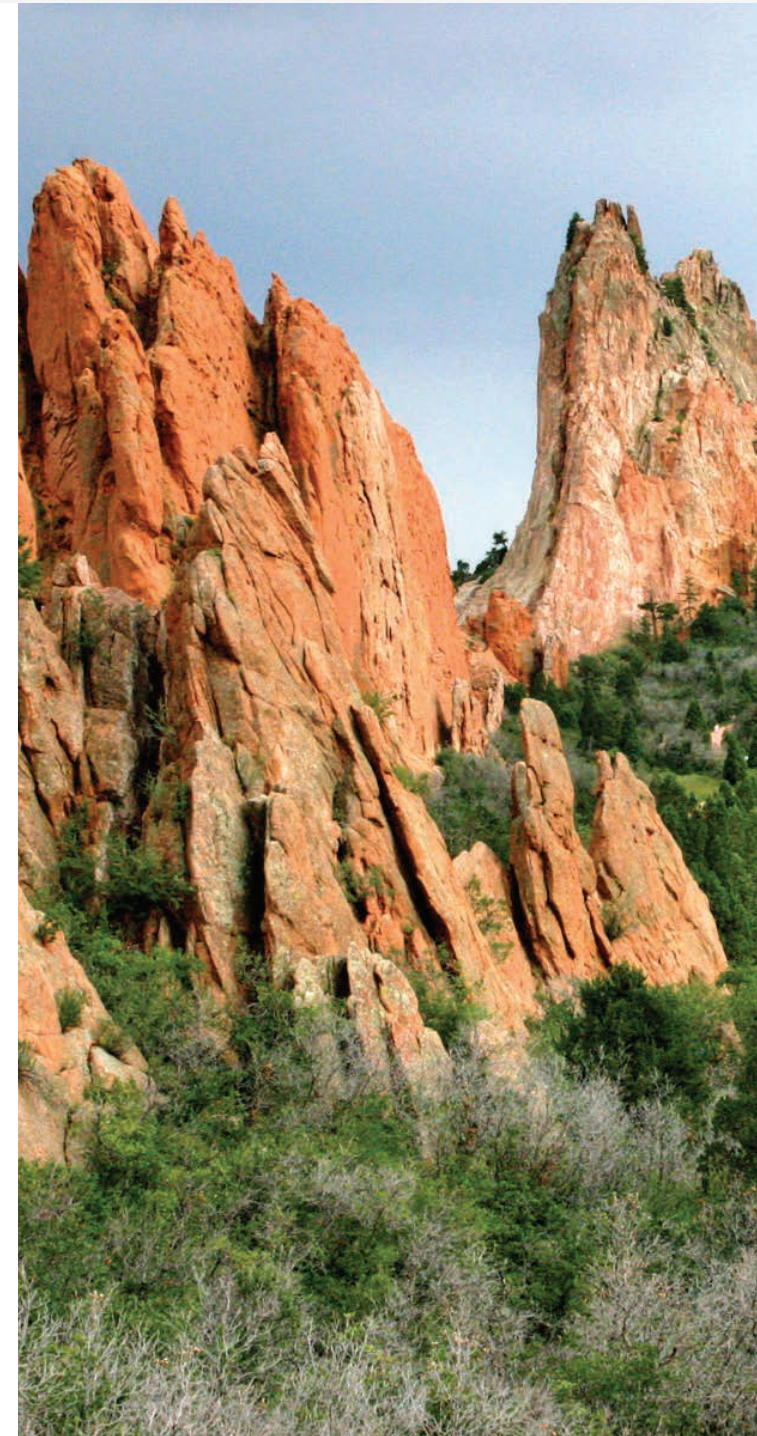
Through the Place DNA™ Survey, the region's residents shared their collective appreciation for the natural wonders of the region, where access to such spectacular landscapes rallies locals around adventure. The people who live here declared a passion for getting outdoors and into the nearby mountains and waterways.

Because of the spectacular natural wonders, well-developed infrastructure, Olympic connection, cultural diversity, and a wide array of experiences available, coupled with the second-most urban area in the state

and easy access to restaurants and entertainment, residents shared that they see the region as an embodiment of Quintessential America. The urban, outdoor lifestyles that reflect the nature of the region were echoed throughout the sentiment analysis and the workshops exposed similarities in experiences, identity and travel patterns between the distinct areas of the region, including Pueblo, Chaffee County and half of Park County.

Perched at the confluence of urban development and natural geography, the Pikes Peak Wonders region offers residents and visitors the best of both worlds: an environment where they are within reach of rugged outdoor experiences as well as the comforts of modern amenities and technology.

Along with the Sawatch Mountain Range and Garden of the Gods Park, destinations like the headwaters of the Arkansas River provide unique opportunities for fishing and whitewater rafting. Here, travelers can explore guided mountain trails alongside rivers rushing through gorges and finish the day enjoying gourmet cuisine, local spirits and craft beverages. Relying on the vitality that weaves together the lives of those in the region, the largest opportunity for tourism growth lies in a collaborative plan to collectively strengthen the regional brand identity.



Regional Profile: Pikes Peak Wonders

Key Defining Attributes:



Supporting Attributes:

- Active
- Art
- Culture
- Developed
- Diverse
- Exceptional
- Front Range
- Garden of the Gods
- Gold Rush
- Headwaters
- Lively
- Mature
- Military
- Mountains
- Natural Wonders
- Olympics
- Outdoor Adventure
- Pikes Peak
- Quintessential American
- Royal Gorge
- Rugged
- Tourist Friendly
- Urban
- Vibrant

Defining Attributes

DNA DRIVERS

- Mountains
- Climate
- Forests and wildlife
- Parks
- Festivals and events

IDENTITY DRIVERS

- Authentic
- Beautiful
- Happy
- Friendly
- Honest

DNA OVER-INDEXING

- History (+7%)
- Mountains (+6%)
- Forests and wildlife (+6%)
- Climate (+3%)
- Artists (+2%)

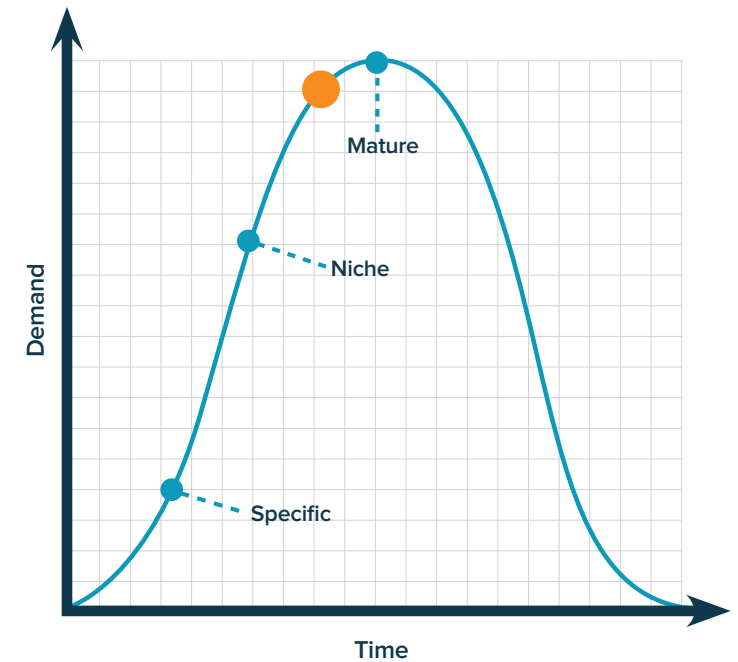
IDENTIFY DIFFERENCE FROM CO

- Liberal (+14%)
- Open minded (+11%)
- Young at heart (+10%)
- Unsafe (+9%)
- White collar (+8%)

CONSUMER SENTIMENT DRIVERS

Pueblo	Museums, Entertainment, Festivals
Colorado Springs	Hiking + Trails, Hot Air Balloon Tours, Horseback, Shopping, Restaurants, Attractions, Entertainment, Nightlife
Manitou Springs	Hiking + Trails, Shopping, Restaurants, Attractions
Cañon City	Fishing, Kayaking + Canoeing, Rivers & Beaches, Museums, Shopping, Attractions, Entertainment, Nightlife

Destination Lifecycle



Visitor spending

\$1.96B

(11%)

*2017 Visitor Spending as provided by
The Colorado Tourism Office.*



Positioning Statement

The Pikes Peak Wonders region is found in the heart of Colorado and is one of the best places to experience a slice of real America. It's a blend of urban comforts and accessible natural wonders that means making the most out of each day.

It's a place where visitors can easily check off bucket-list wonders such as Garden of Gods Park, the Royal Gorge, Pikes Peak - America's Mountain and the Sawatch Mountain Range.

Natural wonders pair well with exploration of the character-filled towns of Buena Vista and Salida or one of the many Creative Arts Districts in the region. Whether it's an exhilarating day of whitewater rafting or an enjoyable night on the town in one of Colorado's vibrant city centers, the Pikes Peak Wonders region will give you the option to slow things down or kick it up a notch.





Brand Story

The moment you set foot in the Pikes Peak Wonders region, you'll realize it's a destination that is authentic and a true reflection of the Western way of life. It is a place where nature's monuments have been made accessible, though not completely tamed, alongside a diverse urban landscape.

Hike up Pikes Peak to feel the energy that inspired Katharine Lee Bates to pen "America the Beautiful" or visit the area's other natural wonders such as the magical Garden of Gods Park, the steep walls of the Royal Gorge and the majestic Collegiate Peaks. Being in the vicinity of Colorado Springs, Olympic City, USA, will inspire you to get active and ski, hike, and whitewater raft.

Natural wonder is complemented by diverse vibrant city and town centers to visit, where you may opt to slow things down with a day of urban and cultural exploration in the towns of Salida and Buena Vista or one of the unique Creative Arts Districts..

The Pikes Peak Wonders region will offer you an array of unique bucket-list experiences in an easy, accessible way.





Recommendations

The Pikes Peak Wonders region is a mature region, with iconic tourism experiences and an outstanding reputation. Tourism will continue to flourish in the region and the focus should be on managing growth in the right way, reaping the economic benefits and ensuring the local sentiment towards tourism stays positive.

The region is perfect for visitors who like things to be easy and comfortable, yet spectacular. The combination of accessible world-renowned natural wonders, corresponding outdoor experiences and a mature tourism infrastructure creates an easy experience that translates to impactful memories in the minds of visitors.

Moving this region forward with a plan that grows tourism in a sustainable way without losing resident support, eroding the quality of experience, or becoming too touristy in the mind of the visitor is important. Growth can come by working on shoulder seasons, dispersion and alignment of product and experiences with the brand story.



DESTINATION THINK!'S RECOMMENDATIONS FOR THIS REGION MOVING FORWARD ARE:

01

Create a destination management plan to grow sustainably.

This region already hosts many visitors. Growth can't come at the expense of the quality of the experience or resident support. A masterplan for this region would allow for growth that follows the right path toward continued prosperity and sustainability.

02

Build a marketing plan with focus on shoulder season growth and dispersion.

Immediate growth opportunities for the region are in the shoulder season and dispersal of tourists. A plan should be created where different parts of the region can tell a shared story and strengthen individual offerings. For example, a daytrip from a popular tourist hotspot to a lesser visited town would create a 'win/win' situation.

03

Identify local themes and niche audiences and turn product into experiences.

This region is one of quality and ease. This can lead to tourism products tailored to the mainstream, often losing some authenticity. Segmenting the broader target audience down to smaller niche audiences and understanding how to inject the regional brand story into the tourism product can ensure a unique, as opposed to a generic experience, is delivered instead.

04

Create a stakeholder-led regional brand committee.

The regional brand and identity should be handed over to a team of regional stakeholders. Continuing to reap the benefits of tourism will require moving the region forward in an aligned way. This needs to come from within the industry itself to ensure participation and buy-in.

05

Grow and foster collaboration between stakeholders.

This region will always be able to rely on its natural wonders as a driver of tourism. It's easy to ignore the bigger picture. But in a world that's more competitive, and knowing the tourism industry is coming under more scrutiny from residents of the places they market and the negative impact this can have, it is important to create alignment and collaboration amongst stakeholders.



REGION 1

REGION 2

REGION 3

REGION 4

REGION 5

REGION 6

REGION 7

REGION 8

REGION
04

Mystic
San Luis Valley



Introduction

In South-central Colorado, the Mystic San Luis Valley region contains the largest alpine desert valley in the world, with views that span 100 miles. A ring of mountains, some more than 14,000 feet high, tower over sand dunes in one area of the valley floor and small towns are scattered throughout the region.

The strong sense of community that anchors this place is fostered by interesting, unpretentious people who love the outdoors.

Rooted in Native American heritage and known as the birthplace of modern Colorado, this region is also home to a vibrant Hispanic and religious history. Local tourism infrastructure, though limited, invites travelers to visit attractions like historic railways, the Stations of the Cross, a UFO site and an alligator farm, providing an eclectic and interesting mix of people, culture, history and outdoor experiences.

The Place DNA™ Survey uncovered the local appreciation for the Mystic San Luis Valley and neighboring Huerfano County as an unspoiled, slow-moving place of the past, with a diverse natural geography, including lakes, rivers and deserts. Proud of their deep Hispanic heritage, the real and down-to-earth residents didn't hide their strong community spirit, placing value on working together to determine what's best for the region and making decisions together.

In an effort to maintain the unique nature of the region, industry partners agreed that they could use a collaborative, focused, development plan to bolster tourism in the region without ruining its authentic rural appeal. Cohesive workshop feedback reinforced the overwhelmingly positive sentiment about

the region and its people, who are unabashedly proud of the 100 mile-views double rainbows, high elevation crops like potatoes and quinoa, Rio Grande headwaters and Great Sand Dunes National Park, not to mention the Creede Theatre, which was voted one of the best places off-Broadway to see a show.

While much of Colorado boasts a rich history, this area has Hispanic roots that are alive and flourishing today. Even as the epicenter of a more modern culture, the region also served as a launchpad for European and Spanish exploration, in which visitors can still find a dialect of Spanish here that is older than anything spoken in Spain today. This unified community supports a careful approach to preserving their past as they move thoughtfully into the future.

Here, the admiration for nature is as wide as the open skies and high as the surrounding peaks; where people travel from all over to traverse the 14ers, get off the beaten path, and into the pristine outdoors. And, while it's accessible, the unspoiled nature and spirit of this area has been well-maintained, making it an ideal place for travelers who seek rich culture, outdoor recreation and a taste of vivid history—truly a destination for kind and curious spirits.



Regional Profile: Mystic San Luis Valley

Key Defining Attributes:



Supporting Attributes:

- Alpine Desert
- Alpine Valley
- Community Spirit
- Crime
- Cultured
- Curiosities
- Different
- Diverse
- Drugs
- Eclectic
- Economically Depressed
- Geology
- Great Sand Dunes National Park
- Hispanic History & Culture
- History
- Mountains
- Origin Place
- Peaceful
- Protected
- Religious
- Rio Grande
- Rio Grande Headwaters
- Rooted
- San Luis Valley
- Sky
- Slow To Change
- Small Towns
- UFO Sightings
- Vast
- Views
- Trains

Defining Attributes

DNA DRIVERS

- Mountains
- Lakes and rivers
- History
- Forests and wildlife
- Unique way of life

IDENTITY DRIVERS

- Diverse
- Slow paced
- Rural
- Happy
- Friendly

DNA OVER-INDEXING

- Lakes and rivers (+25%)
- History (+18%)
- Plains and/or deserts (+18%)
- Mountains (+11%)
- Native people (+8%)

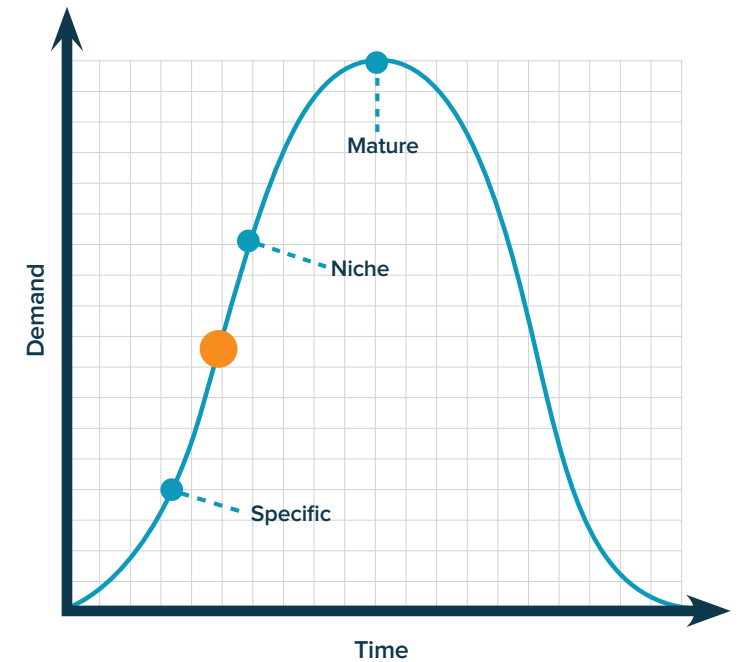
IDENTIFY DIFFERENCE FROM CO

- Rural (+46%)
- Place of the past (+41%)
- Slow paced (+38%)
- Established (+28%)
- Unspoiled (+24%)

CONSUMER SENTIMENT DRIVERS

Great Sand Dunes National Park Camping, Hiking + Trails, Attractions

Destination Lifecycle



Visitor spending

\$87.5M

(>1%)

*2017 Visitor Spending as provided by
The Colorado Tourism Office.*



Positioning Statement

The birthplace of modern Colorado, with a legacy of Hispanic settlers and explorers, the Mystic San Luis Valley region is steeped in history and diverse in culture, where the locals are unpretentious, eclectic and strong believers of community.

It's a spiritual place found in South-central Colorado offering a sense of peace amongst 100 mile-views and magnificent sand dunes in the largest alpine valley in the world. Being in a protected valley surrounded by mountains has preserved and fostered a unique and vibrant culture maintained over centuries. It's an intriguing place that offers historic railways, gator farms and even a UFO watch tower that are truly out of this world. On the ground, the region is rich in world-class geological treasures and outdoor adventures that include hiking, mountain biking, and skiing.

It's a welcoming destination where visitors go to experience an authentic culture that is alive by connecting with the locals.





Brand Story

When you set foot in one of the largest alpine valleys in the world, you'll get a sense that there's more than meets the eye.

Exploring the birthplace of modern Colorado, with its legacy of Hispanic and European exploration, the Mystic San Luis Valley region will reveal itself to you as you learn more about the area's uniquely rich and protected history and diverse culture.

Uncover the eclectic curiosities of the area with a visit to a hot springs-fed gator farm, Creede Repertory Theatre or even a visit to a UFO watch tower. Other experiences that are more down-to-earth include outdoor activities like mountain biking, skiing and scenic hikes in an uncharted setting. Whatever type of activity you choose, you're likely to find a renewed sense of peace and centeredness.

The best part of your trip will probably be the friendly locals who will share their culture and help you uncover the rare and unusual experiences that can only be found in the Mystic San Luis Valley.





Recommendations

The Mystic San Luis Valley region is a region that doesn't attract many visitors but offers a unique experience to the right visitor who is looking for authentic and cultural experiences, preferably in combination with an appreciation of the outdoors.

Located in a valley means being somewhat isolated. Diverse in its origins, Native Americans, Hispanic and European settlers, created a culture that is truly unique and accessible. Today, the locals are friendly, eclectic and community-oriented. The scenery is stunning.

The region can benefit from development, especially on an operator level. Getting operators to participate in advancing the tourism industry forward and strengthening the brand story will be key. This region is at a stage in its destination lifecycle where reputation can be built through the identification and growth of specific consumer segments. Growing visitors based on what is currently available will result in additional investment that can ultimately lead to a path of sustainable growth.



DESTINATION THINK!'S RECOMMENDATIONS FOR THIS REGION MOVING FORWARD ARE:

01

Looking ahead, the focus should be approximately 50% on destination development and 50% on destination promotion.

The current state of the region includes enough product to offer experiences that will resonate with a specific audience. Half of the budget should be dedicated to defining and finding that audience. The remainder can be allocated towards training and development of existing tourism experiences.

02

Create a destination development plan based on regional identity. (Spanish influence with community spirit.)

The region is filled with a unique culture that is accessible and inviting. The development of a regional plan should be built around bringing the authentic culture and community spirit attributes out in every possible way. Working with operators to develop their visitor experiences can make a big difference. For example, something as simple as extending hours of operation when a full trainload of tourists arrive in town after normal hours of operation can have a big impact.

03

Build a niche marketing plan (start with one or two niches).

Finding the right audience segment for this region will be critical. Avoid the mainstream, general traveler, rather find the slice of the audience that is guaranteed to understand what makes this region unique and memorable and, who will ultimately recommend this region to others. Practically, this means finding the one or two niche audiences that will be advocates for this region.

04

Establish a stakeholder-led regional brand committee.

The regional brand and identity should be handed over to a team of regional stakeholders. Authenticity is not something you manage from the outside. It needs to be managed by the people that understand, and are committed to, preserving what makes their place special and distinct. A regional brand is also advanced through alignment and participation.

05

Grow and foster collaboration between stakeholders.

The Mystic San Luis Valley region has many opportunities for benefiting from a visitor economy. But, more than any other region, success is the sum of the collective. The collective experience needs to be understood and implemented by many aligned stakeholders.



REGION
05

Mountains
& Mesas



Introduction

The Mountains & Mesas region occupies space on Colorado's Western Slope, in the Southwestern corner of the state. It lies at the intersection of uniquely stunning geographical features and an active culture rich in human history.

Founded upon the legacy of the Ute Mountain Tribe and the Ancient Puebloans, who built the city of Mesa Verde more than 11,000 years ago, the locals of this region still rely on a deep connection to nature and its history. From the mining towns of the San Juan Mountains to the quaint farming towns surrounding Grand Junction, the region is home to both small, intimate communities and a high concentration of protected parks that make outdoor activities an essential part of life.

Surveys, interviews and workshops revealed the residents' passion for creating authentic experiences for locals and visitors alike. Connected by a strong sense of identity and visible travel patterns, regional partners from Grand Junction, Southwestern Telluride, Silverton and Durango are determined to collaborate on sharing the majesty of the region with everyone. While the region's diverse geography - including mountains, mesas, canyons, rivers and lakes - can make getting there a challenge, it is the same features that make it home to a wide variety of outdoor sports and worth the extra effort it takes to get there. Here, the picturesque environment provides visitors with more than

ice climbing, mountain biking, skiing or canyoneering; it also offers exceptional produce, craft beverages and ranch and farm experiences that extend a genuine taste of the region.

More than just magical scenery and locally grown produce, the Mountains & Mesas region is a complex mix of robust cultures that are all tied closely to the land. From Indigenous tribes and immigrant settlements to mining routes and agricultural communities, a rich heritage has shaped the region's identity, giving rise to an authentic spirit of the west that can still be seen as much as felt. The locals, who are passionate about pursuing challenging activities, such as outdoor adventures in Crested Butte, are equally invested in engaging visitors in their own transformative experiences. Those who arrive to experience an undiscovered area in the Black Canyon of the Gunnison National Park may also find themselves at home in the mom-and-pop lifestyle that encourages a pace slow enough to stop and smell the abundant wildflowers.



Regional Profile: Mountains & Mesas

Key Defining Attributes:



Supporting Attributes:

- Active
- Agriculture
- Ancient Pueblos
- Biking
- Black Canyon of the Gunnison
- Dark Skies
- Diverse Geography
- Farming
- Fruit
- Geology
- Grand Mesa
- Highways
- History
- Hot Springs
- Majestic
- Mesa Verde
- Mining
- Native Americans
- Night Sky
- Picturesque
- Public Lands
- Railway
- Rivers & Lakes
- Rugged
- San Juan Mountains
- Scenic
- Slow Paced
- Ute Mountain Tribe
- Western
- Wilderness
- Wine

Defining Attributes

DNA DRIVERS

- Mountains
- Climate
- Forests and wildlife
- Lakes and rivers
- Parks

IDENTITY DRIVERS

- Authentic
- Beautiful
- Friendly
- Safe
- Happy

DNA OVER-INDEXING

- Lakes and rivers (+13%)
- Roads, bikeways and infrastructure (+11%)
- Unique way of life (+6%)
- Forests and wildlife (+5%)
- History (+5%)

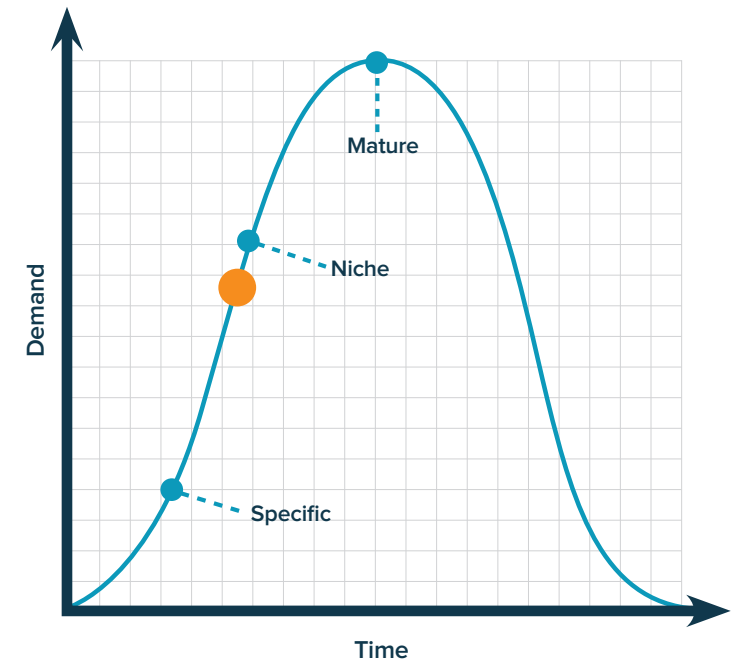
IDENTIFY DIFFERENCE FROM CO

- Rural (+20%)
- Conservative (+11%)
- Slow paced (+10%)
- Classic (+9%)
- Blue collar (+8%)
- Idle (+7%)

CONSUMER SENTIMENT DRIVERS

Mesa Verde National Park	Camping, Climbing, X-Country + Snowshoe, Hiking + Trails, Hot Air Balloon Tours, Golfing, Museums, Restaurants
Durango	Biking, Camping, Fishing, Hiking + Trails, Horseback
Silverton	Off-Roading, Museums, Restaurants, Attractions, Entertainment, Nightlife, Festivals
Telluride	Skiing + Snowboarding, Entertainment, Festivals
Ouray	Climbing, Off-Roading, Retreats
Colorado National Monument	Camping, Climbing, Hiking + Trails
Gunnison	Camping, Climbing, Fishing, Kayaking + Canoeing, Hot Air Balloon Tours, Wildlife Viewing, Retreats
Crested Butte	Biking, Camping, X-Country + Snowshoe, Fishing, Skiing + Snowboarding, Wildlife Viewing

Destination Lifecycle



Visitor spending

\$952.6M

(5%)

*2017 Visitor Spending as provided by
The Colorado Tourism Office.*



Positioning Statement

The Mountains & Mesas region is set apart by its history, passionate people, culture and picturesque towns and landscapes. It is a place to be awed. Victorian-styled silver mining towns, farming communities and the Ute Mountain Tribe infuse unique character and majesty into the region.

The ancient town of Mesa Verde offers a world-class view into prehistoric times. The San Juan Mountains and the Western Slope offer endless opportunities to get outside. Farm-to-table dining, wineries, and appreciating the bounty each season offers are the perfect complement.

It's an extraordinary part of Colorado that attracts different visitors who actively pursue their passions, and don't mind the extra effort to get there.





Brand Story

You'll be rewarded for your effort when you arrive in the Mountains & Mesas region. Feel its spirit run through you as you begin to absorb its history and mesmerizing geography.

Connect with the spirit of the unique human culture by visiting the ancient town of Mesa Verde which was built by the Ancestral Puebloans. While you are there, learn about the Ute Mountain Tribe and their unique culture. Connect with the spirit of the land by wandering Victorian-styled silver mining towns found in the San Juan Mountains, visiting one of the charming farming communities set on the Western Slope, or catching sight of the largest table top mesa in the world.

Join the passionately active locals and try to keep up hiking, biking, ice climbing or skiing a powdery hill with million dollar views from Crested Butte and Grand Junction to Durango and Pagosa Springs. Slow things down with a delicious bottle of wine at a local vineyard, or appreciate the bounty of the season with fabulous farm-to-table dining. That little bit of extra effort that it takes to get to the Mountains & Mesas region is worth experiencing enduring awe.





Recommendations

The Mountains & Mesas region is diverse, both from an experience and maturity perspective. It offers iconic experiences including mountain resorts as well as Mesa Verde, “the Machu Picchu” of North America, with a range of active and historic experiences in between, all painted by the unique character of the place.

The main challenge of this region is distance to large urban centers and consumer entry points and it takes more effort to get the region compared to other regions of the state. Besides some awareness challenges around the iconic experiences, for example; Mesa Verde should be as iconic as Machu Picchu in the mind of consumers, the extra time poses a challenge to move consumers from consideration to intent and purchase.

With the diversity of the region combined with iconic experiences, and with the challenge of the effort to get there, lends itself for a niche marketing strategy. This strategy, based on connecting with people’s passions, will assist in building strong reputation that flows into the mainstream.

When people who are passionate about ancient cultures and history start visiting in larger numbers, they will spread the word. When people with super-active lifestyles understand the locals share their same passion, and with potentially even more intensity, they will visit. When a roadtripper understands the diversity and unique authentic characters of each town, they will move this region higher on their wishlist.



DESTINATION THINK!'S RECOMMENDATIONS FOR THIS REGION MOVING FORWARD ARE:

01

Establish a stakeholder-led regional brand committee.

The regional brand and identity should be handed over to a team of regional stakeholders to use this as a tool to move this region forward. By creating alignment, deepening the brand story and by making it relevant to niche audiences.

02

Create a destination development plan to manage growth.

This region has the basic foundations for tourism success in place. The next step is the creation of a plan to move the region forward. What are the goals for growth? What is required from a capacity perspective? Who are the right visitors for this region?

03

Inject diverse areas and experiences with regional DNA.

By flavoring individual experiences with the identity of the region, the destination story strengthens and becomes unique through its authenticity. How will individual towns and products deliver on their chapter in the brand story? How will an individual tourism operator connect with the regional brand identity?

04

Create a niche promotional plan.

Building reputation for this region will need to happen by connecting with niche audiences. A critical step in managing the right growth for this region will be to segment an audience in a way that aligns with the region's identity and diverse set of offerings. Next, is to understand where in the customer journey we can eliminate pain points while increasing remarkable experiences that generate the right consumer advocacy.

05

Grow and foster collaboration between stakeholders.

To some stakeholders, a region might seem arbitrary and artificial. Creating regional collaboration will be key. This doesn't need to be with a hard stop at the regional boundary. There might be experiences in neighboring regions that connect or supplement.



REGION
06

Rockies
Playground



Introduction

Situated near Central Colorado, this region encompasses multiple mountain ranges. It is the only region in the state that is located 100% in the Rocky Mountains.

Its specific experiences unify it around a cohesive identity and appeal to travelers; one that has established it as an iconic, world-class ski areas with luxury and family-friendly resorts in Aspen, Vail, Breckenridge, Copper Mountain, Winter Park and more.

While winter sports are undoubtedly the main attraction here, this region also offers other experiences like white water rafting and exploring historic mining towns. Still, it goes without saying that this is an area where people come to play. Because of its wide appeal, there is substantial infrastructure that enables people to easily enjoy all that the Rockies have to offer, and both locals and visitors alike take full advantage of the unique experiences available.

At home in the heart of the Rockies, the local lifestyle is centered on the majestic mountains, which have played a huge role in the development of infrastructure. Through surveys, residents revealed feeling like they have a unique way of life, driven by living distinctly comfortable lives in a mountainous and otherwise rustic setting. They see the area as rural, made up mostly of small towns, and in many cases due to the region's popularity it is more touristy than other areas of the state, with 19% of the state's total tourism spend; however locals still boasted about a relaxed environment ideal for adventurous spirits and the young-at-heart who like to indulge.

Because of the strong similarities between the concentrated mountain towns, resident workshops uncovered a shared sense of identity hinged on their sense of adventure and love of outdoor sports, like rafting, hiking, mountain biking, skiing and snowboarding. The convenience that surrounds the activities across the region, including skiing and snowboarding, restaurants, nightlife, golfing and shopping, upholds a one-of-a-kind, on-and-off mountain experience for travelers and residents alike.

This is a region with a reputation as epic as its mountains. For travelers, there is a brag-worthy element to this destination, as it appeals to many who come to see and be seen as well as many more who want to ski the varied and complex terrain, determined to conquer a bit of the natural grandeur. While it's dominated by mountains and saturated by convenience-packed resorts, the region offers robust experiences beyond snow sports.

And although tourism in the Rockies Playground region is already wildly successful, its future hinges on dispersion. Avoiding over-tourism and overflowing resorts will require a collaborative effort to bring more travelers to lesser-known towns throughout all seasons of the year. There's an opportunity here for residents to show travelers a warmer side of the region, where golfing, hiking and rafting opportunities invite visitors to explore the outdoors amid a stunning mountain setting.



Regional Profile: Rockies Playground

Key Defining Attributes:



Supporting Attributes:

- Accessible
- Active
- Amenities
- Après-ski
- Beautiful
- Concentrated Infrastructure
- Crowded
- Developed
- Dining
- Expensive
- Famous
- High-end
- Highways
- I-70
- Iconic
- Mature
- Olympics
- Outdoors
- Polished
- Prestige
- Progressive
- Rafting
- Shopping
- Ski
- Small Towns
- Snow
- Snowboarding
- Touristy
- Villages
- Well-known
- World-class
- Year-round

Defining Attributes

DNA DRIVERS

- Mountains
- Climate
- Forests and wildlife
- Lakes and rivers
- Unique way of life

IDENTITY DRIVERS

- Authentic
- Rural
- Beautiful
- Safe
- Happy

DNA OVER-INDEXING

- Lakes and rivers (+36%)
- Economic drivers (+30%)
- Forest and wildlife(+26%)
- Local cuisine (+22%)
- Mountains (+21%)
- Climate (+21%)

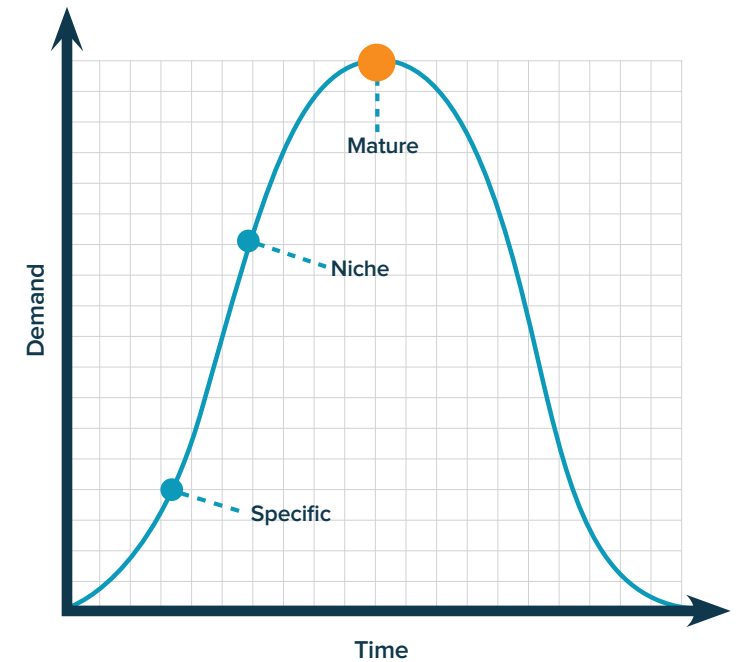
IDENTIFY DIFFERENCE FROM CO

- Rural (+47%)
- Touristy (+25%)
- Classic (+19%)
- Young at heart (+17%)
- Slow paced (+16%)

CONSUMER SENTIMENT DRIVERS

Aspen	Skiing + Snowboarding, Restaurants, Entertainment, Nightlife
Snowmass	Skiing + Snowboarding, Hot Air Balloon Tours, Golfing, Shopping
Vail	Skiing + Snowboarding, Golfing, Shopping, Entertainment, Nightlife
Keystone	Skiing + Snowboarding, Retreats
Winter Park	Biking, X-Country + Snowshoe, Skiing + Snowboarding

Destination Lifecycle



Visitor spending

\$3.72B
(19%)

*2017 Visitor Spending as provided by
The Colorado Tourism Office.*

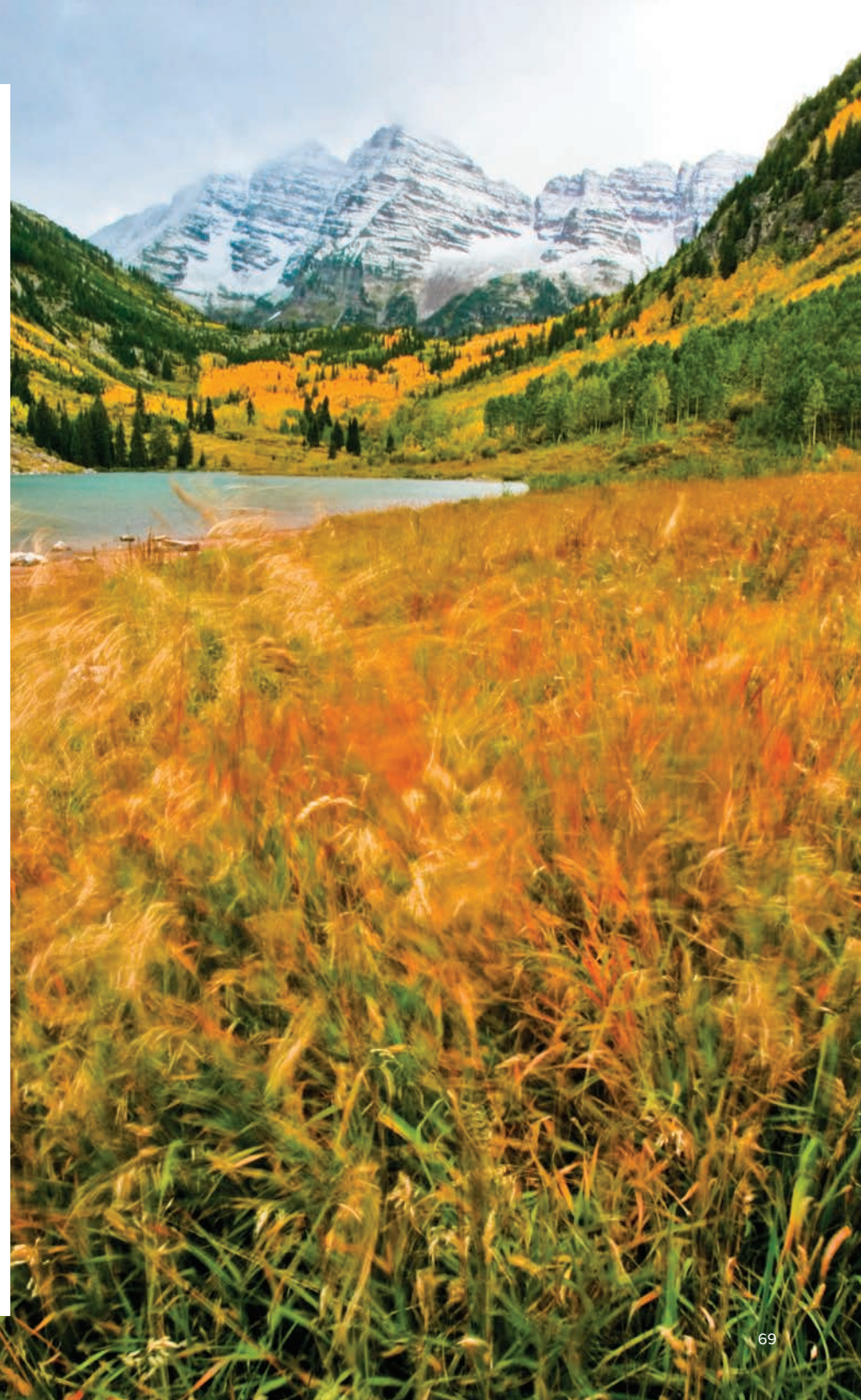


Positioning Statement

Famous for some of the most iconic and well-known skiing and snowboarding resorts in the United States, the Rockies Playground region is loved by those who want to immerse themselves in high-end mountain experiences.

The Rockies Playground region is found in the heart of the Colorado Rockies and on the bucket lists of skiers and adventurers from around the world. With iconic resorts found from Aspen to Vail, it comes as no surprise that snowboarding and skiing are the region's signature activities. With a different resort around every bend in the highway, families, weekend adventurers, and extreme athletes can access the perfect terrain for them.

In the warmer months, visitors can find a selection of hiking, rafting, mountain biking trails or step back in time to explore the rich mining history of the area. At the foot of each breathtaking slope, the region's visitors can enjoy luxury accommodation, fine dining, and upscale shopping to round out their experience.





Brand Story

For those who only want the best, the Rockies Playground region offers the highest caliber mountain resort experience in the United States.

Home to such iconic Rocky Mountain resort towns as Aspen, Vail, Winter Park and Breckenridge, this is the place to show off on and off the slopes and enjoy all the comforts that the best in class has to offer. Whether you spent the day working up an appetite on the groomers or in the backcountry, freshen up at your chalet and treat yourself to one of the many fine après ski options in the area.

If you're visiting during the warmer months, go for a long hike, river raft, mountain bike ride or mix it up by slowing things down to explore the rich mining history in the area. There are plenty of activities in the Rockies Playground to choose from, all with the same luxuries you've come to expect down below.

Make your friends jealous, by sharing your world-class on-mountain and off-mountain experiences.





Recommendations

The Rockies Playground region is a region that is well developed and one of the most visited parts of Colorado. It enjoys a very strong reputation, both in summer for its iconic Rocky Mountain location and in winter for its world famous ski resorts.

The future of this region is one of managing growth in the right way, specifically as it relates to capacity. The current infrastructure, especially the I-70, is already being tested at certain times.

A destination at the peak of the destination lifecycle curve runs the risk of becoming generic because its reputation is no longer based on specific things but the experience overall. Even though this leads to tourism growth in the short-term, over the long-term it can turn into an overhyped place that results in a declining reputation because, to quote Yogi Berra, "Nobody goes there nowadays, it's too crowded."

Even though most ski resorts and towns are located in this region, some are part of other regions (for example Steamboat and Telluride). For this region it will be important to recognize for the sake of collaboration, development and communication that the regional boundaries are soft and other resorts fit within certain initiatives as it is in everyone's best interests to ensure a positive experience is preserved for both local and visitors alike.



DESTINATION THINK!'S RECOMMENDATIONS FOR THIS REGION MOVING FORWARD ARE:

01

Create a destination development plan to manage growth.

The biggest opportunity and threat to this region (beyond annual snow conditions) is capacity of the region's infrastructure. Resorts, and their respective towns, are reaching capacity while access into the mountains is highly congested. An aligned destination development plan is a requirement to manage growth well into the future.

02

Create regional differentiation through resort identities.

The region is distinct from other areas of the state. One way to ensure diversification within the region is through the positioning of the different resorts. There is an opportunity to increase repeat visitation by giving people a baseline experience that's of high quality, like the snow terrain and quality of hotels and restaurants. But allow people to experience each resort in a slightly different way by bringing to life its own unique identity and that of the corresponding towns.

03

Avoid becoming generic by shifting to niche marketing.

Avoiding a generic reputation happens by creating niche market segments. This allows for stronger communication based on specific, relevant experiences and strong reputation coupled with the power of word-of-mouth. This region should identify specific niches and create individual marketing plans for them.

04

Establish a stakeholder-led regional brand committee.

The regional brand and identity should be handed over to a team of regional stakeholders. The development of the destination and niche promotional activities can only succeed through a coordinated effort amongst the stakeholders to foster buy-in and participation.

05

Grow and foster collaboration between stakeholders.

This region benefits from strong tourism product with modern and sophisticated marketing. There is already a lot of collaboration and alignment and this should be nurtured and grown further. There is the risk of individual stakeholders seeking continued growth for their own resorts and towns and missing the opportunity for true dispersion.



REGION

07

The Great West



Introduction

In Northwestern Colorado, The Great West Region is one of geographic diversity. The landscape, with everything from high tundra and rolling hills, to the evergreen mountain passes of the Rockies and the sage-covered scarlet mesas of the Western Slope, this region is a true picture of the wild west epitomized in films, complete with sprawling livestock ranches, wild horses and cattle drives flavor the western experience.

Traditionally rural, the culture of this region is defined by its pioneering and rugged, independent spirit and built on the tenacity of the ranch lifestyle.

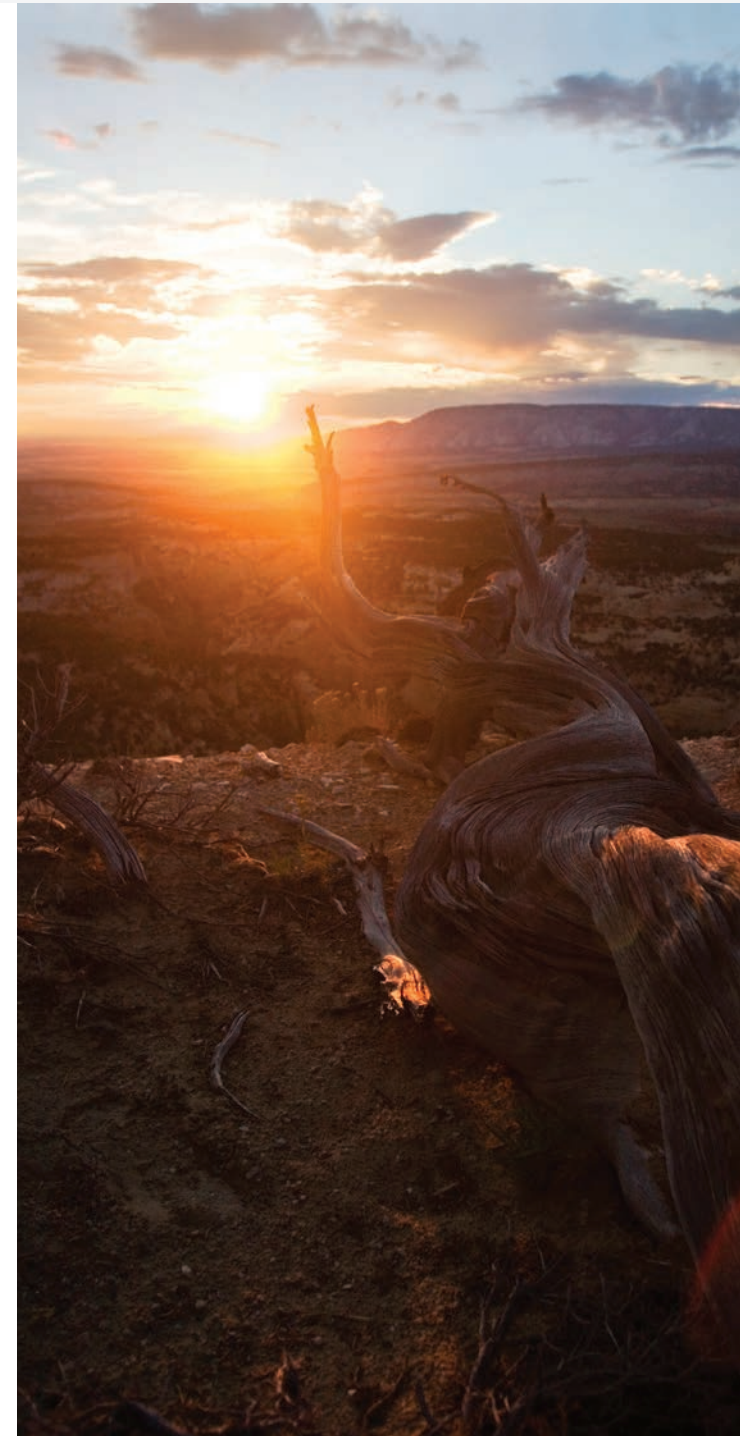
Like most of Colorado, the residents of the Great West are outdoors people, though here the activities are a different type of outdoor recreation: hunting, fishing, and riding motor-powered vehicles, like quads and snowmobiles, to traverse the varied terrain. Dotted with ranching communities and hillside homesteads, the region is connected to the rest of the state by highways and anchored by the ski town of Steamboat Springs, where a regional airport, a traditional mountain town, resorts and other amenities offer an easy getaway.

Through surveys, interviews and workshops, local residents and industry partners noted that while the region is rural and traditional in nature, its people possess an authentic, friendly disposition and unique brand of Western hospitality. Locals displayed an obvious sense of pride in the nature of the region and the tenacious culture they share among themselves. They see themselves as straight shooters; the kind of salt-of-the-earth, hard-working people who have survived on traditional values. They feel connected by their dedication to activities like horseback riding, fishing and hunting, as well as through sports

like skiing, kayaking and canoeing. Despite a complicated history of conflict that took place among early settlers, the community has acknowledged the need to continue to come together to move forward.

In the Great West, visitors can partake in a true experience of the rugged, wild west culture that left an impression on the entire country. Western in both culture and geographical location, the residents live in close-knit ranching communities raising livestock and adventuring outdoors. Characterized by warm, friendly people who find themselves at home in hard work, it's a good place to get off the beaten path and instead explore Dinosaur National Monument, many charming small towns, the rolling green hills or mountains and canyons at a slower, quieter and gentler pace.

This region seems to move by its own clock. It's a place where even though time has seemed to slow, the people still find a rush in the great outdoors, whether that means shooting the biggest buck, catching the biggest fish or riding through the mountains in every season. Here, authenticity flows from every aspect of the place, inviting travelers to hang their hats beside those of the local cowboys whether it is at a ranch stay or the après-ski spots in Steamboat Springs.



Regional Profile: The Great West

Key Defining Attributes:



Supporting Attributes:

- Active
- Archaeology
- ATV-ing
- Authentic
- Traditional
- Cowboys
- Dinosaur National Monument
- Eclectic
- Elk
- Fishing
- Genuine
- Hunting
- Lakes & Rivers
- Livestock
- Native American history
- Natural Resources
- Off the Beaten Path
- Outdoor Recreation
- Outdoors
- Pastures
- Resort
- Rugged
- Ski
- Slow Paced
- Small Towns
- Snowmobiling
- Steamboat Springs
- Unspoiled
- Western
- Wild Horses
- Open space

Defining Attributes

DNA DRIVERS

- Mountains
- Lakes and rivers
- History
- Forests and wildlife
- Unique way of life

IDENTITY DRIVERS

- Rural
- Authentic
- Friendly
- Unspoiled
- Safe

DNA OVER-INDEXING

- Mountains
- Lakes and rivers
- History
- Forests and wildlife
- Unique way of life

IDENTIFY DIFFERENCE FROM CO

- Rural
- Traditional
- Slow paced
- Classic
- Blue collar
- idle

CONSUMER SENTIMENT DRIVERS

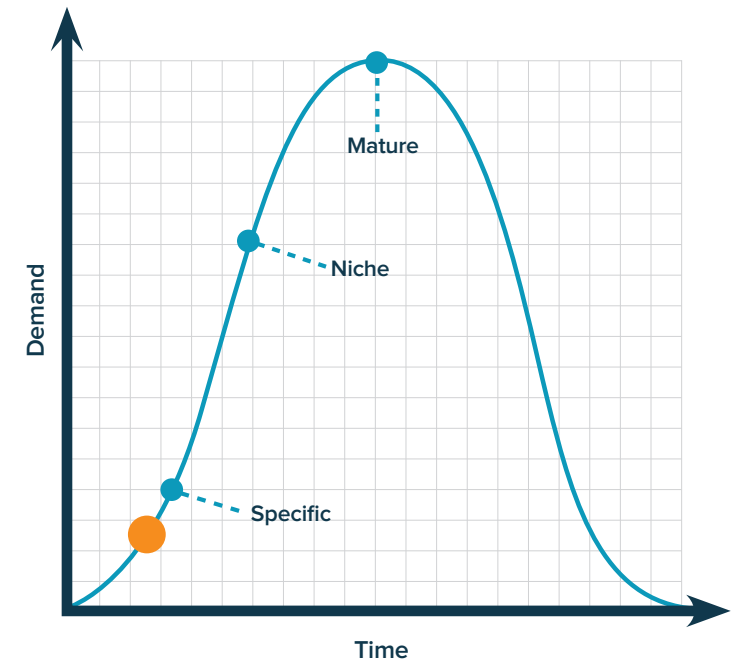
Steamboat Springs

Biking, X-Country + Snowshoe, Skiing + Snowboarding, Hot Air Balloon Tours, Nightlife, Retreats

Dinosaur National Monument

Camping, Hiking + Trails, Kayaking + Canoeing, Wildlife Viewing

Destination Lifecycle



Visitor spending

\$438M

(3%)

*2017 Visitor Spending as provided by
The Colorado Tourism Office.*



Positioning Statement

The Great West region is a ranching destination characterized by its warm and friendly people, western history, and salt of the earth spirit.

The landscape features rolling hills dotted with ranches and pastures set amongst the mountains and canyons where visitors can join locals in their favorite past times of skiing, hiking, fishing, ATV-ing, snowmobiling, dirt biking, and boating. After enjoying a day of outdoor recreation or exploring ancient petroglyphs at Dinosaur National Monument, it's the kind of place where time moves more slowly and visitors can spend the evening wandering through art galleries, antiques shops, and enjoying a relaxing meal before turning in at a guest ranch for the night..

It's the ideal destination for those who want to come as they are to slow things down, get a taste of the West and connect with warm-hearted locals.





Brand Story

If you want to disconnect and get off the beaten path to experience the authentic West, the Great West Region is just the place for you. Slow it down and breathe in the rolling green hills, mountains and canyons in an area that's loaded with a traditional western tenacity.

Taking place in a setting of real working ranch communities, you can go skiing in Steamboat Springs, explore quaint main streets, see the incredible canyon country at Dinosaur Monument, or get a glimpse of country life. Feel at home amongst friendly locals whose smiles are genuine and handshakes are firm. Join in on some of the favorite local pastimes such as hiking, hunting, fishing, ATV-ing, snowmobiling, dirt biking, boating, and river sports.

At the end of your day, put on your favorite pair of jeans and enjoy a low key visit to one of the local art galleries, antiques shops, or enjoy a hearty meal. This is the laid-back vacation you've yearned for, so chill out and explore the Great West Region at your own pace.





Recommendations

The Great West region is a region with key defining assets, experiences and opportunities for growth. With a distinct culture and look, it can market to a different audience from other regions, or position similar experiences through a different lens. The region embodies a western lifestyle with real people, embracing friendly and traditional values and approach life in a genuine way.

How this identity impacts the experience is prevalent in the small ranching communities and the way people in the region explore the outdoors. But it's also impacting a ski resort like Steamboat, where the cowboy identity is fully baked into the experience.

Growth in this region needs to come from reaching the right audience who are looking for experiences based on the identity of the people who live here. This can be because it aligns with their own values, or because people want to see what life like this is like.



DESTINATION THINK!'S RECOMMENDATIONS FOR THIS REGION MOVING FORWARD ARE:

01

Looking ahead, the focus should be approximately 70% on destination development and 30% on destination promotion.

Product and experiences exist in certain pockets of this region. Investment in the future needs to start on the development side, by creating specific experiences aligned with the region's identity and creating alignment throughout industry in the region.

02

Create a destination development plan based on regional identity (western lifestyle).

The region is filled with a unique culture that's often sought out and romanticized. Who doesn't want to be a cowboy or cowgirl, even if it's just for a few days? And because this part of the region's identity comes straight from its DNA, there is a real opportunity to give people that distinct and special experience.

03

Build niche marketing plan (start with one niche) for underdeveloped areas. Leverage iconic assets.

Building reputation in this region should start by identifying the right market segment. In combination with the strong assets that exist in the region, namely Steamboat ski resort, Dinosaur National Monument, ranches and outdoor recreating, it will help strengthen advocacy and word-of-mouth.

04

Establish a stakeholder-led regional brand committee.

The regional brand and identity should be handed over to a team of regional stakeholders. Authenticity is not something you manage from the outside. It needs to be managed by the people that understand, and are committed to, preserving what makes their place special and distinct. A regional brand is also advanced through alignment and participation.

05

Grow and foster collaboration between stakeholders.

The Great West region has many opportunities for benefiting from a visitor economy. But success will be the result of the sum of its collective. Deepening the destination story without losing its authenticity and telling that story collectively is the key to success.



REGION
08

Denver & Cities of the Rockies



Introduction

Denver & Cities of the Rockies lies in North-central Colorado, on the Front Range of the Rocky Mountains. The most urban area in the state, it is also tied closely to the mountains, including Rocky Mountain National Park. This region is also home to quiet plains that lie just to the east and rivers that wind through and around the small towns and cities. Alongside Denver, an assortment of cities and towns – including Aurora, Boulder, Fort Collins, Loveland, Greeley, Estes Park – maintain their own unique character as well as similarities in urban development, progressive population, and active lifestyles.

The most ethnically diverse part of the state sees the residents in this area are united by a shared sense of identity. The air is filled with a forward-thinking spirit, a work-hard, play-hard attitude that places a lot of value on an energetic and outdoorsy lifestyle. The open embrace of innovation has led to the development of advanced infrastructure, including Denver International Airport, major highways, hospitals, colleges and universities, museums, music venues and enviable nightlife.

To residents, the aspects that defined the region's Place DNA™ were its modern, urban amenities. Their fast-paced lifestyle and progressive mindset is satisfied by the abundance of public art, museums, parks and gourmet, farm-to-table dining establishments. In surveys and interviews, industry partners echoed the importance of the diverse attractions in the area, suggesting they lead to a high spending average that helps drive the economy of the state.

While workshops revealed residents' pride in all of their attractions, it was the cultural experiences that resounded most widely. From Red Rocks Amphitheatre and world-class museums to the booming beer culture and professional sports scene, the region attracts

and maintains a diverse population and diverse perspectives that add to its dynamic spirit.

Nowhere in Colorado is a region more concentrated in both urban and outdoor adventure experiences in such close proximity. As a gateway to the rest of the state, Denver & Cities of the Rockies appeals to a wide audience through the unified, lively spirit that calls to travelers looking to experience the great outdoors and still come back to an urban setting for the evening. Home to the top craft beer scene in the country, renowned music venues, and a large portion of the Rocky Mountain National Park, the region has something for everyone.

Perfect for those with a range of interests, this region is one that can easily keep up. As industry partners continue their collaborative efforts to provide a cohesive identity, visitors will find themselves in the midst of a destination that operates both indoors and outdoors—the perfect blend of a bustling, metropolitan lifestyle and an adventurous, innovative culture bound only by the captivating, mountainous landscape that surrounds it.



Regional Profile: Denver & Cities of the Rockies

Key Defining Attributes:



Supporting Attributes:

- Amenities
- Arts & Culture
- Beer
- Boulder
- Changing
- Colleges
- Coors Brewery
- Culinary
- Cultured
- Denver
- Denver Broncos
- Development
- DEN
- Diverse
- Estes Park
- Farm-to-table
- Festivals & Events
- Fort Collins
- Friendly
- Gateway
- Greeley
- History
- Hub
- Industry
- Innovative
- Loveland
- Mountains
- Open
- Endurance Race Culture
- Red Rocks Amphitheatre
- Rocky Mountain National Park
- Suburban
- Transportation
- Vibrant
- Work Hard/Play Hard Lifestyle

Defining Attributes

DNA DRIVERS

- Mountains
- Climate
- Parks
- Festivals and events
- Forests and wildlife

IDENTITY DRIVERS

- Authentic
- Friendly
- Beautiful
- Happy
- Safe

DNA OVER-INDEXING

- Local amenities (+8%)
- Public art (+5%)
- Local cuisine (+5%)
- Parks (+5%)
- Museums (+5%)

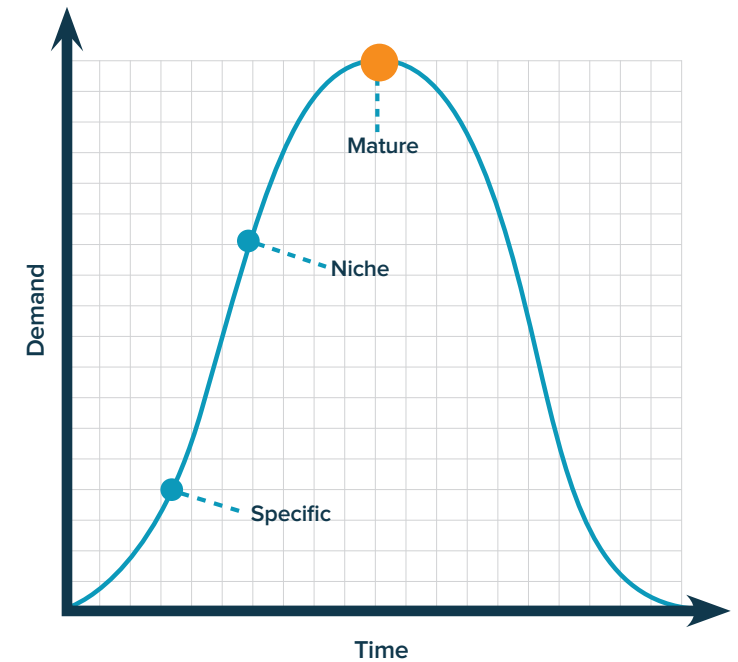
IDENTIFY DIFFERENCE FROM CO

- Urban (+17%)
- Liberal (+13%)
- Place of the future (+12%)
- Fast paced (+12%)
- Modern (+10%)

CONSUMER SENTIMENT DRIVERS

Denver	Museums, Shopping, Breweries, Restaurants, Attractions, Entertainment, Nightlife, Festivals
Boulder	Biking, Climbing, Hiking + Trails, Horseback, Breweries, Entertainment
Fort Collins	Shopping, Breweries, Restaurants, Entertainment, Nightlife, Festivals
Rocky Mountain National Park	Biking, Wildlife Viewing

Destination Lifecycle



Visitor spending

\$10.1B
(57%)

*2017 Visitor Spending as provided by
The Colorado Tourism Office.*



Positioning Statement

Nestled against the foothills of the Rocky Mountains, the Denver & Cities of the Rockies region is the heart of urban Colorado.

Anchored by the vibrant city of Denver, which serves the central hub for many visitors, it is complemented by its urban neighboring communities of Aurora, Boulder, Fort Collins, and Loveland each with its own distinct character. Defined by its forward-looking and progressive culture, it's home to open minded locals who are as passionate about the arts, innovation, festivals, cultural events, farm-to-table dining, and craft beer as they are about active, outdoor adventure in the mountains and nearby Rocky Mountain National Park.

The Denver & Cities of the Rockies region is worth a trip all on its own, and can also be the perfect start or end for a trip to Colorado.





Brand Story

When you arrive in Northern Colorado's Denver & Cities of the Rockies region, you'll feel its vibrant energy as soon as you set foot in this blend of urban and mountainous landscape. Set against a picturesque Rocky Mountain backdrop, find yourself energized by exploring vibrant cities, each with their own unique character that pairs perfectly with the outdoor adventures that are always nearby.

Denver, the Mile High City, is developing into a modern world-class city that honors its rich history. With diverse citizens, Denver's dynamic culture is alive with people who are passionate about their unique lifestyle. Boulder is a charming and picturesque university town that is home to people whose sense of identity is inextricably linked to outdoor adventure, pushing physical and endurance limits, and an open academic mindset. Also enriched by its own university, Fort Collins is where contemporary life happens in a beautiful and energetic town that is filled passionate locals. People gather in the many communal places filled unique character and history to share a pint from one of the countless local breweries to talk about their outdoor adventures that day.

Embrace a sense of discovery as you take your time to enjoy and uncover what makes each place in this region distinct. Wander lively streets whose character has been shaped by history, visit a museum or art gallery, experience a local festival or find the perfect spot for dinner. If you'd like something more active, hiking, biking kayaking, and rock climbing in the beautiful Rocky Mountains themselves or Rocky Mountain National Park is nearby.

The Denver & Cities of the Rockies region will offer you the opportunity to keep up with your many interests, all at the pace and setting you choose.





Recommendations

Denver & Cities of the Rockies is a mature region that receives the highest number of visitors. For many visitors, it is either the entry point into the state, or at least one of the places to visit. The area is urban in nature with a number of cities sprinkled throughout the region, creating an urban corridor flanked by the mountains on the west and the plains on the east.

The cities in the region are connected but also distinct in their own local identities. This region is the place to experience Colorado's urban culture while always at arms length of the iconic Rocky Mountains. Because the region is urban in nature, it contains experiences not found in other parts of the state, or in much bigger density or quality.

Denver & Cities of the Rockies is at the height of the destination lifecycle. Managing the next stage of growth needs to be done carefully. The opportunity for this region is to continue acting as the hub for Colorado's visitors while also tapping into a market for urban visitors by strength in numbers. Unified under one regional umbrella, there are opportunities for niche segmentation and dispersion strategies that have been proven successful for cities around the world who are suffering from congestion.



DESTINATION THINK!'S RECOMMENDATIONS FOR THIS REGION MOVING FORWARD ARE:

01

Create a destination development plan to manage growth.

The region has room to grow, but growth should be managed carefully through a long-term strategy or masterplan. This needs to include capacity, infrastructure, experiences, resident sentiment and building reputation in specific market segments.

02

Avoid becoming generic by shifting to niche marketing.

Large cities and urban regions run the risk of generating a generic reputation. With too many things to do and see can result in a watered-down message. Instead, specific niche market segments need to be selected and a specific development communication plan needs to be created to stay relevant to these audiences.

03

Create regional differentiation and strengthen regional offering by leveraging individual city identities.

A city in Colorado is different from other cities in the US. They share a connection to the Rockies and a culture that is rooted in the pioneering days. But every city also has its own unique sub-identity that allows for a regional story that is compelling and attractive. Drilling down into these points of differentiation won't create competition, but will allow for a stronger overall offering and competitiveness of the state.

04

Establish a stakeholder-led regional brand committee.

The regional brand and identity should be handed over to a team of regional stakeholders. Continuing to reap the benefits of tourism will require moving the region forward in an aligned way. This needs to come from within the industry itself to ensure participation and buy-in.

05

Grow and foster collaboration between stakeholders.

This region enjoys more than half of the statewide tourism revenues. This means the region includes well-funded DMOs and operators with sizable marketing budgets. This can lead to a lack of interest to collaborate. But the competition isn't local, it is national and international. Through that lens, alignment is the only road to success.





Conclusion

Ultimately, by defining the unique qualities of each area of the state into cohesive regional identities and imbuing those qualities into both the experiences and visitors touch points, Colorado will build the tourism industry's competitive advantage. This next phase of work hinges on turning locals and visitors alike into advocates and continuing to generate alignment throughout the tourism industry. By working together and honoring the distinctive experience that each region offers, travelers will be able to connect with the experiences they desire and the tourism industry will have a strong platform for building a strong reputation, development, and dispersion.



For any questions regarding the content within this report, please contact the Destination Think! Team:

William Bakker | Chief Strategist & Partner
william@destinationthink.com

Sarah Prud'homme | Strategic Consultant
sarah@destinationthink.com

Shannon Landreth | Client Strategist
shannon@destinationthink.com