R. Thayer Tutt Jr.
Vice Chairman & Chief Investment Officer
Mayor John Suthers
WHAT DO YOU BELIEVE ARE THE REGION’S GREATEST NATURAL ASSETS?
Comparing Colorado Springs to Comparable Cities: What Role for Outdoors?
COLORADO SPRINGS AND COMPARABLE CITIES
A Decade of Chamber of Commerce Visits

Chamber Regional Leaders Visits From 2009 to 2018
• 2009 Austin, TX
• 2010 Charlotte, NC
• 2011 Oklahoma City, OK
• 2012 Portland, OR
• 2013 Omaha, NE
• 2014 Salt Lake City, UT
• 2015 Nashville, TN
• 2016 Columbus, OH
• 2017 Charleston, SC
• 2018 Boise, ID
Colorado Springs Excels!

#1 MOST DESIRABLE PLACES TO LIVE OF 125 LARGEST METRO AREAS; 2018 U.S. NEWS & WORLD REPORT RANKINGS

#2 BEST PLACES TO LIVE OF 125 LARGEST METRO AREAS; 2018 U.S. NEWS & WORLD REPORT RANKINGS

RANKING OF 6 ON USDA AMMENITY RANKING – 1 (LOW) 7 (HIGH)
 WHERE COLORADO SPRINGS EXCELS
…And What We Can Learn From Four Comparable Cities

<table>
<thead>
<tr>
<th></th>
<th>USDA Natural</th>
<th>US News</th>
<th>Travel &amp; Tourism</th>
</tr>
</thead>
<tbody>
<tr>
<td>Colorado Springs</td>
<td>6</td>
<td>#1</td>
<td>16.9%</td>
</tr>
<tr>
<td>Portland</td>
<td>5</td>
<td>#2</td>
<td>16.6%</td>
</tr>
<tr>
<td>Austin</td>
<td>5</td>
<td>#6</td>
<td>17.9%</td>
</tr>
<tr>
<td>Nashville</td>
<td>4</td>
<td>#11</td>
<td>16.6%</td>
</tr>
<tr>
<td>Charleston</td>
<td>4</td>
<td>#17</td>
<td>23.3%</td>
</tr>
</tbody>
</table>
WE ATTRACT AND SHINE IN THE OUTDOORS

71% of Colorado residents participate in outdoor recreation each year, and this number doesn’t even count visitors traveling to Colorado. It’s no surprise that outdoor recreation is immensely important to this state and those who live and play here – it contributes to a higher quality of life, making people and communities happier and healthier.

– Colorado, Office of Economic Development & International Trade, Choose Colorado
PUBLIC LANDS AMENITIES

State Land

Forest Service Land

[Map showing state and forest service land amenities with percentages and city names]
PARK LAND AS A PERCENT OF CITY AREA

Colorado Springs
Austin
Portland
Nashville
"Colorado is an area with an unrivaled heritage and culture of outdoor and activity-based lifestyles, as well as a thriving business environment. It is a great strategic fit for our business .. we believe that the creation of our new headquarters in the area will help us to unlock collaboration across the outdoor brands, attract and retain talent and accelerate innovation.”

View of Steve Rendle, VF’s chairman and CEO of Fortune 250 Company; Announcing Relocation to Denver, Aug. 13, 2018
Our competition for industries to relocate is stiff

<table>
<thead>
<tr>
<th></th>
<th>Population %</th>
<th>Age: % 18-34 (2016)</th>
<th>Education: % over 25 with Bachelor's</th>
</tr>
</thead>
<tbody>
<tr>
<td>Change (2010-2016)</td>
<td></td>
<td></td>
<td>Degree or Higher (2016)</td>
</tr>
<tr>
<td><strong>Colorado Springs</strong></td>
<td>10.9%</td>
<td>26.4%</td>
<td>36.6%</td>
</tr>
<tr>
<td><strong>Portland</strong></td>
<td>9.3%</td>
<td>28.0%</td>
<td>42.7%</td>
</tr>
<tr>
<td><strong>Austin</strong></td>
<td>17.2%</td>
<td>31.9%</td>
<td>46.4%</td>
</tr>
<tr>
<td><strong>Nashville</strong></td>
<td>9.0%</td>
<td>29.6%</td>
<td>38.2%</td>
</tr>
<tr>
<td><strong>Charleston</strong></td>
<td>11.2%</td>
<td>27.8%</td>
<td>41.1%</td>
</tr>
</tbody>
</table>
# Travel and Tourism in Colorado Springs

Employment by Sector in 2016 (% of total jobs)

<table>
<thead>
<tr>
<th>Travel &amp; Tourism Related</th>
<th>16.6%</th>
</tr>
</thead>
<tbody>
<tr>
<td>Retail Trade</td>
<td>2.3%</td>
</tr>
<tr>
<td>Passenger Transportation</td>
<td>1.6%</td>
</tr>
<tr>
<td>Arts, Entertainment, &amp; Recreation</td>
<td>2.5%</td>
</tr>
<tr>
<td>Performing Arts &amp; Spectator Sports</td>
<td>0.7%</td>
</tr>
<tr>
<td>Museums, Parks, &amp; Historic Sites</td>
<td>0.1%</td>
</tr>
<tr>
<td>Amusement, Gambling, &amp; Rec.</td>
<td>1.7%</td>
</tr>
<tr>
<td>Accommodation &amp; Food</td>
<td>10.2%</td>
</tr>
<tr>
<td>Non-Travel &amp; Tourism</td>
<td>83.4%</td>
</tr>
</tbody>
</table>
“Quality of life, including outdoor recreation amenities, is ranked as one of the main factors considered when choosing company location — second only to the availability of talent. Highly educated workers choose cities based on economic, cultural, and lifestyle considerations, and integrated green space is part of the urban environment they seek.”

AND Don't OVERestimate Thought Process of Some Using the Outdoors!

• "Escalators would help on steep uphill sections."
• "The coyotes made too much noise last night and kept me awake. Please eradicate these annoying animals."
• "Trails need to be wider so people can walk while holding hands."
• "Need more signs to keep area pristine."
• "Please avoid building trails that go uphill."

Forest Service Comment Cards
HISTORY OF MARKETING IN THE PIKES PEAK REGION

Matt Mayberry
Matt Mayberry
Director, Colorado Springs Pioneers Museum
Colorado Springs, Colo.
THE CITY OF SUNSHINE

IS THE IDEAL ALL-THE-YEAR-ROUND HEALTH AND PLEASURE RESORT.

This unique City of Sunshine, nestled at the threshold of the Rocky Mountains, has long held the international reputation of being one of the greatest health and pleasure resorts in the world. Why?

THE ATMOSPHERE IS ABSOLUTELY ASEPTIC AND FREE FROM ALL GERM LIFE.

EPIDEMICS OF SUCH DISEASES AS SCARLET FEVER, DIPHTHERIA, TYPHOID, ETC. ARE UNKNOWN.

THERE HAVE BEEN MORE PERMANENT RECOVERIES FROM PULMONARY COMPLAINTS THAN IN ANY OTHER CLIMATE IN THE WORLD.
Come to Colorado Springs - Manitou
The Pikes Peak Region.
PIKES PEAK
AUTO HILL CLIMB

Labor Day Race

SEPTEMBER 1ST
1947
AMERICA'S ALL-YEAR PLAYGROUND

Colorado Springs
Manitou Springs
and the
PIKES PEAK REGION

Pikes Peak Motorway
Gateway to America's Vacation Land

COLORADO SPRINGS AND MANITOU SPRINGS, COLORADO
COLORADO SPRINGS’
Attraction and Retention Strategies
Dirk Draper
President & CEO
Associated Words

Beautiful
Air Force
Quality of life Outdoor Mountains
Remote climate Nature Pikes Peak
Conservative Cold Snow
recreation Good Clean
Conservative College Tourism
Vacation Laid-back
Scenic Scenic
Military Olympics
Close
Relaxed
Aerospace
Relaxing
Growing
Denver Friendly
Strengths

- Competitive business costs
- Pro-business
- Quality of life
- Location
- Workforce
- Outdoor recreation
- Proximity to Denver
- Climate
- Educational system
- Cost of living
- Don't know
- Close to Denver
- Size
- Ability to recruit talent
- US Olympic Accessibility
- Taxes
- Military
- Infrastructure
- Beauty
Outdoor Opportunities

- Outdoor Retailer
- Business Development
- National Reputation
- Natural Test Market
Corporate Perceptions

On select location factors
From 1 (poor) to 10 (excellent)
<table>
<thead>
<tr>
<th>Importance of Factor</th>
<th>Rating of Colorado Springs</th>
</tr>
</thead>
<tbody>
<tr>
<td>Housing cost</td>
<td></td>
</tr>
<tr>
<td>Housing availability</td>
<td></td>
</tr>
<tr>
<td>Alternative job opportunities for yourself</td>
<td></td>
</tr>
<tr>
<td>Job opportunities for your spouse/partner</td>
<td></td>
</tr>
<tr>
<td>Retail/shopping opportunities</td>
<td></td>
</tr>
<tr>
<td>Recreational amenities</td>
<td></td>
</tr>
<tr>
<td>Access to restaurants/breweries</td>
<td></td>
</tr>
<tr>
<td>Accessibility/proximity to major urban center</td>
<td></td>
</tr>
<tr>
<td>Music/Arts/Cultural amenities</td>
<td></td>
</tr>
<tr>
<td>Quality of K-12 education</td>
<td></td>
</tr>
<tr>
<td>Availability of public transportation</td>
<td></td>
</tr>
<tr>
<td>Political climate</td>
<td></td>
</tr>
<tr>
<td>Active social scene / nightlife</td>
<td></td>
</tr>
</tbody>
</table>

**Talent Perceptions**

Importance of factor + Perception of COS in personal relocation decisions
From 1 (poor) to 10 (excellent)
Secret Sauce
Maslow’s Hierarchy of Needs

- **Physiological**
- **Safety**
- **Social**
- **Ego**
- **Self-actualization**
Draper’s Hierarchy of Economic Development

1. Site Availability
2. Workforce
3. Market Access
4. Incentives, Tax Rates
5. Infrastructure, Utilities
6. Quality of Life
Key Takeaways

• The Chamber & EDC emphasizes outdoor recreation as an element in The Experience Economy, one of our four target industry sectors.

• For companies, outdoor amenities are the “self-actualization” in most location decisions.
  • Often, the smaller the company, the more important.

• For talent attraction, outdoor amenities are more important than for companies.
Doug Price
President & CEO
Destination Master Plan

What is Destination Master Planning?

- Focus on infrastructure, facilities, services, attractions & events which need to be developed to improve overall visitor offering & experience
- Time frame of 10 years and beyond
- Coordinated with and integrated into other planning initiatives underway

Why Now?

- Fierce global competition
- Consumers demanding authentic, local and unique experiences and services
THE PROCESS

STRATEGIC ASSESSMENT
1. Review of 1,000+ pages of reports & data
2. Analysis of travel trends
3. DestinationNEXT online diagnostic review
4. Visitor & industry research

COMMUNITY ENGAGEMENT
1. 14 focus groups
2. 30+ one-on-one interviews
3. 2,400+ public opinion survey responses
4. Input from meeting planners, travel trade & sports organizers
Objective:
Develop a clear, action-oriented, 10-year Destination Master Plan for Colorado Springs & Pikes Peak Region.
COLORADO SPRINGS and the Pikes Peak Region will be the leading U.S. destination for experiential travel, inspired by the majesty of Pikes Peak; iconic, accessible natural wonders; and the Olympic spirit.
What Did Visitors Do?
2028 ASPIRATIONS

- 29.3 million visitors to the region (+25% over 10 years)
- Create sustainable & responsible growth supported by the community
- $4.9 billion spending in the region (+100% over 10 years)
Key Takeaways

1. Impressive natural assets are a tremendous foundation.
2. With significant population growth, it is a pivotal time to align plans for the visitor economy.
3. A unified brand for Colorado Springs and the Pikes Peak Region would be extremely valuable.
4. The U.S. Olympic Museum will help transform downtown’s appeal for visitors.
5. An event venue is lacking – whether it serves the sports or meetings market must be determined.
6. Collaboration would be enhanced through more stakeholder networks and greater regional cooperation.
5 Big Ideas

Make Colorado Springs & the Pikes Peak Region the most desirable place for urban and outdoor experiential travel in the U.S.

Further leverage the presence of the Olympic organizations and the new U.S. Olympic Museum

Develop the right sports-event and meeting venues for the city and region to attract out-of-town events

Make the region the place for four-season arts, culture, and festivals in Colorado

Establish a regional, sustainable transportation system
Destination Goals

Provide Unique Experiences

Enhance Regional Collaboration

Deliver Priority Infrastructure

Strengthen the Destination Brand

Improve Connectivity
Provide Unique Experiences – Initiatives

A) Signature Events: Expand existing events/festivals and introduce new signature events/festivals throughout the year to develop visitor markets on a four-season basis.

B) Iconic Trail System: Complete the iconic Pikes Peak “Ring the Peak” trail system and the downtown Colorado Springs “Legacy Loop.”

C) Olympic Experiences: Animate downtown Colorado Springs by using the U.S. Olympic Museum as a catalyst to develop unique, connected experiences such as athlete interactions, Olympic sports demonstrations/participation and an Olympic “Walk of Fame.”

D) Experiential Tours: Continue to create a series of multi-seasonal experiential tours to profile uniqueness and diversity of the region and to encourage year-round visitation from a wide variety of interest groups.

E) Unique Performance Venue: Establish a unique and iconic outdoor location/venue for music events and other arts/cultural performances.

F) Centers of Excellence: Create centers of excellence for idea incubation and development in areas such as entrepreneurship, IT, space, health and wellness, cybersecurity and aging to build business/education travel markets.

G) Multi-Generational Travel: Foster and increase multi-generational family travel by providing tailored activities and choices for all ages and interests.
Deliver Priority Infrastructure – Initiatives

A) Parks & Trails Maintenance: Improve funding for maintenance and sustainability of regional and city parks and trails, including increased security measures.

B) Sports & Entertainment Venues: Pursue the development of indoor and outdoor venues for sports events, festivals and entertainment like an outdoor amphitheater, bicycle park and city auditorium, leveraging City for Champions funding where appropriate.

C) Basecamp Facility: Develop a Pikes Peak basecamp facility to provide services/products and promote the unique range of nearby natural attractions and experiences immediately accessible to visitors and residents.

D) Convention Center: Determine the feasibility of a public or private downtown Colorado Springs convention center.

E) Sustainability: Provide short- and long-term solutions to ensure the viability of key regional attractions (e.g. Garden of the Gods Park, Cog Railway, Pikes Peak Summit Complex and Manitou Incline).

F) Pikes Peak Planning: Ensure Pikes Peak – America’s Mountain is further planned and utilized as a significant visitor asset with the collaboration of all key stakeholders.

G) Arts & Culture: Leverage momentum of the newly introduced Ent Center for the Arts as well as the Creative Corridor to showcase connected arts & culture facilities and events throughout the region while also improving coordination among them.
Improve Connectivity – Initiatives

A) Regional Transportation Improvements: Create a comprehensive Front Range and Pikes Peak Region transportation system to include road/highway improvements and new multi-modal services to connect visitors to key attractions, experiences and destinations.

B) Internet Connectivity: Increase reliable cellular service and Wi-Fi coverage throughout the region to eliminate dead spots and to enhance safety, navigation between attractions and sharing of experiences on social networks.

C) Biking & Hiking Trails: Complete a biking and walking trail system that connects Colorado Springs to key natural experiences in the region.

D) Public Transit: Establish sustainable intra-regional transportation options, including a frequent, hop-on/hop-off shuttle service to attractions, more bus routes throughout Colorado Springs and public transit to and from the Colorado Springs Airport.

E) Wayfinding: Develop extensive branded wayfinding signage system on highways, streets and trails to effectively orient car, bike and pedestrian traffic to attractions, venues and service providers.

F) Air Service: Continue to support increased air access at the Colorado Springs Airport.
Strengthen the Destination Brand – Initiatives

A) Olympic City USA Brand: Further establish and leverage the Olympic City USA brand with the various agencies promoting Colorado Springs to differentiate the destination.

B) Year-Round & Iconic Experiences: Position Colorado Springs & the Pikes Peak Region as a unique and dynamic four-season destination nestled among iconic essential-visit natural experiences (e.g. Royal Gorge Region, Pikes Peak – America’s Mountain, Garden of the Gods Park, Cripple Creek).

C) Shoulder & Off-Season Marketing: Elevate winter, spring and fall brands in the marketplace to build off-peak visitation.

D) Funding: Increase tourism promotion funding to support four-season marketing.
Enhance Regional Collaboration – Initiatives

A) Coordinated Plans: Maximize coordination and alignment opportunities of Destination Master Plan initiatives with existing and emerging city and regional plans.

B) Parks & Roadway Connectivity: Build relationships and cross-collaboration with outdoor recreation, parks and roadway agencies to maximize connectivity and wayfinding to enhance the visitor and resident experience.

C) Olympic Experience Coordination: Partner with the U.S. Olympic Committee and other Olympic-related organizations to coordinate and enhance the visitor experience as it relates to the Olympic City USA brand, the Colorado Springs Olympic Training Center, the U.S. Olympic Museum and new Olympic-related experiences.

D) U.S. Air Force Academy Experience Coordination: Partner with USAFA to coordinate and enhance the visitor experience as it relates to the renovated planetarium, new visitor center, renovated Cadet Chapel and areas open to the public.

E) Activity Packaging: Establish more formal, ongoing collaboration among tourism industry organizations to package experiences such as an activity passport.

F) CTO/DMO Collaboration: Explore formal collaboration with the Colorado Tourism Office (CTO) and other Colorado DMOs to generate new traffic from long-haul markets.

G) Military Installations: Improve communication with the military installations in and around Colorado Springs to provide information for visitors and support military families with information about the region.
Top-Eight Priorities for VCOS to LEAD:

1. **Year-Round & Iconic Experiences**: Position Colorado Springs & the Pikes Peak Region as a unique and dynamic four-season destination nestled among iconic essential-visit natural experiences (e.g. Royal Gorge Region, Pikes Peak).

2. **Shoulder & Off-Season Marketing**: Elevate winter, spring and fall brands in the marketplace to build off-peak visitation.

3. **CTO/DMO Collaboration**: Explore formal collaboration with the Colorado Tourism Office (CTO) and other Colorado DMOs to generate new traffic from long-haul markets.

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KEYNOTE
Luis Benitez
Luis Benitez
Director
INDUSTRY LEADERS PANEL
Julian Flores
Chief of Staff and Special Projects

FoodMaven
CHRISt LIEdEL
US Olympic Museum

MARGAREt SABIN
Penrose-St. Francis Health Services (Former)

BArry BROWN
The Broadmoor Hotel

StEvE KACZMAREK
Borealis Fat Bike

MIKE JURAN
Altia, Inc.
R. Thayer Tutt Jr.

Vice Chairman & Chief Investment Officer
COLORADO SPRINGS’ GREAT OUTDOORS
Links to Quality of Life and Economic Vitality