



Destination 2030

Louisville's Tourism Strategic Plan

Tourism & Destination Advisory



Hello

Dear Tourism and Hospitality Industry Stakeholders,

Over the past year, Louisville Tourism set out to develop a Destination Strategic Plan (DSP). As tourism and hospitality is the third largest industry for Louisville Metro, Louisville Tourism understands the need to sustain our hospitality and tourism industry's growth. As our city and community dealt with the challenges of 2020, we have taken on this opportunity to step back, evaluate and continue to push forward for the future of the destination. As the official Destination Marketing Organization for Louisville Metro, Louisville Tourism remains committed to our industry partners and community at large and we hope that through this plan we will further strengthen our city's quality of place. We look forward to continuing to work with all of our partners now and over the next several years to realize the successes built into our Destination Strategic Plan.

Karen Williams

President & CEO

Dear Tourism and Hospitality Industry Stakeholders,

As we share this final plan with you, our goal is to work together to take the recommended actions for future product development, infrastructure enhancements, destination experience and organization and partner support to achieve Louisville's ambitions as a premier visitor destination. We are sharing this with you to help us lead Louisville towards a dynamic future vision for our destination. This roadmap seeks to accelerate Louisville's sustainable economic growth and development by increasing visitor and convention business from 16.4 million visitors in 2015 to 25 million visitors by 2030. A core plan component has resulted in launching a new Black Tourism Advisory Council (BTAC), comprised of Louisville's African American community members representing the seven sectors of the hospitality industry, as well as other community stakeholder organizations of Louisville Tourism. This group will advise Louisville Tourism on strategies to build and promote a more diverse tourism product by curating the city's rich, cultural assets to launch new Black Heritage experiences, with the long-term goal of improving the destination experience for visitors and residents.

As stewards of our destination, we look forward to our continued partnerships within and outside the hospitality industry to implement the plan's strategies into action. We trust you will join us.

Cleo Battle

Chief Operating Officer







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Executive summary

Overview

The importance of tourism as an economic driver across Louisville emphasizes the need for vision, action and management that preserves the authentic experiences that make the area both a great place to live and a unique must-see destination for the future. This need for vision, combined with strategy and action to guide the destination's future, prompted the development of the Destination Strategic Plan (DSP).

As the destination continues to improve its quality of place, it is important that a plan be put in place to guide the future of tourism development and sustainability for Louisville Metro. Louisville Tourism committed to playing a direct role in planning and managing for the destination and kicked off the Destination Strategic Planning process in July 2019.

To facilitate this process, Louisville Tourism engaged JLL's Global Tourism and Destination Advisory practice. Over the last 16 months, JLL and Louisville Tourism have worked closely to reach into the community, listen and learn from residents and stakeholders, conduct extensive market research and ultimately prioritize a series of categorical recommendations to ensure the sustained success of Louisville as a destination.



Goal of the Destination Strategic Plan

The overall goal of the DSP is to create a roadmap to guide the destination through destination development and sustained success to achieve 25 million visitors by 2030. This goal was an ambitious one to grow visitation by 55% in a 10-year period prior to the COVID-19 global pandemic. With the impact of COVID-19 on the travel and tourism industry, the momentum lost in Louisville will be important to regain. Louisville as a city has a plan to “Build Back Better Together” which Louisville Tourism’s leadership has participated in. The industry faced COVID-19 challenges while the entire community also faced social challenges that caused further reflection in the planning process, which resulted in new and enhanced initiatives in this Plan. Louisville Tourism remained steadfast in planning for the future of the destination and subsequently its partners, stakeholders and community at large. With all of this in mind, Louisville Tourism’s goal remains set at 25 million visitors by 2030.

It is important to note that while the DSP is a full, destination-wide plan that looks at the entirety of Louisville’s tourism and hospitality landscape, the meetings and conventions segment was identified as a dedicated focus area separate from the DSP. A study of the Kentucky International Convention Center (KICC) was conducted in parallel with this DSP and the results and deliverables of that study look to grow Louisville Tourism’s impact on conventions and meetings at KICC by 30% and increase the production level to impact 65% of the year’s calendar. Additionally, these goals benefit the bottom line at KICC by 51% compared to calendar year 2019. These results and goals have been shared between KICC and Louisville Tourism teams with a goal to achieve success over a seven year period.





Planning Process

The DSP process was broken down into four phases with the first being focused on reviewing data and history on the destination and organization provided by Louisville Tourism. Phase Two was centered around a concerted stakeholder engagement effort which ultimately included outreach to over 2,500 individuals. The stakeholder engagement initiative included 30 focus groups with 250 participants. A sampling of the focus group topics included:

- **Attractions**
- **Events**
- **Arts and Culture**
- **Bourbon and Distilleries**
- **Bourbon and Food**
- **Economic Development**
- **Transportation**
- **Environmental**
- **Sports**
- **Metro Government and Council**

Phase Two also included a stakeholder survey with over 600 responses and an additional 50 individual meetings with key leaders across the community. Phase Three included the Market Study elements of benchmarking research on competitive destinations at the macroeconomic level as well as the destination attributes level, hotel business mix survey and a review of Louisville Tourism as an organization. Phase Four included the development of the priorities, recommendations, milestone timelines, action items and final Destination Strategic Plan.

COVID-19 Impact

Just past the halfway point of the DSP process, the travel and tourism industry locally, nationally and internationally, was decimated by the COVID-19 global pandemic. While the outbreak brought travel to a standstill, Louisville Tourism recognized the importance of planning for the destination's future and remained committed to seeing the DSP process through. By the time the COVID-19 outbreak affected the US, JLL's process was at the point of wrapping up research and developing the priorities. This timing enabled Louisville Tourism, the DSP Leadership Committee and JLL to think critically about the impacts of a post-pandemic environment and how the recommendations may be affected. Because of this, each priority within the Plan has a section dedicated to the COVID-19 implications.

Overall, JLL and Louisville Tourism remained steadfast in the priorities of the Plan as the impacts will be felt more directly during implementation, along with the need for resources. As challenging as this time has been it has given all of the parties involved, including Louisville Tourism, time to consider the future and reevaluate direction given the current environment as to what will be truly important to Louisville's future.



Recommendations & Priorities

The outcomes of this process included seven categorical priorities each with recommendations, COVID-19 implications, diversity and inclusion recommendations, milestone action items, and identified partners. These priorities include:

- 1.** Mobility & Connectivity - connect visitor assets to improve experience and expand reach into neighborhoods
- 2.** Workforce Development - provide a platform and pipeline for the industry to source quality talent & provide opportunity for local workforce to receive job-ready training with growth potential
- 3.** Product Development - enhance and evolve product offerings in destination assets and attractions, events and sports
 - a.** Assets and Attractions
 - b.** Events
 - c.** Sports
- 4.** Neighborhood Preservation & Development - extend community pride and inspire visitors to experience the unique neighborhoods of Louisville
- 5.** Bourbon Connection - continue to support and enhance the industry's growth to drive increased visitation and visitor spending in Louisville
- 6.** Economic Development - extend impact of tourism and hospitality industry to represent Louisville when recruiting talent and new businesses
- 7.** Policies for Sustainable Tourism Growth - identify areas where policy hurdles or restrictions prevent industry growth or hinder success and provide opportunities to adjust policies going forward
 - a.** Hotel Development
 - b.** Air Service Development
 - c.** Ability to ship bourbon
 - d.** Homelessness & Panhandling

Each of these priorities cover key areas that came up in stakeholder findings and were vetted through the Market Study research. The priorities and subsequent recommendations and actions will position the destination to successfully achieve the goal of 25 million visitors by 2030. Many of these priorities are long-term focus and will have action to be taken in the immediate term as well as prolonged attention needed to realize the ambitions of Louisville as a destination.

Stakeholder engagement

A cornerstone of the DSP process is the commitment to stakeholder inclusion. As this Plan's purpose is to be a roadmap for tourism development, growth and sustainability for years to come, support and engagement of industry stakeholders and community leaders is critically important. The DSP process included outreach to over 2,500 individual stakeholders and community groups. The stakeholder engagement process included a multitude of touch points for input and feedback on the process for Louisville's future as a tourism destination:

2.5K

Total stakeholders engaged

23

Industry and community heads make up the Leadership Committee

30

Focus groups on topics ranging from Churchill Downs and Attractions to Environment and Natural Resources with a total of 250 participants

50

Individual meetings

607

Total responses to the stakeholder survey

+2K

Distribution of monthly stakeholder updates

The value of the stakeholder participation and feedback cannot be understated. This provides insight and guidance into how the tourism and hospitality industry and broader community sees itself now and for the future.



Stakeholder Engagement Outcomes

As stated above, the stakeholder feedback provided insightful guidance and direction to become the basis of many of the priorities and recommendations of the DSP. The feedback also provided foundational information to validate through research in the Market Study phase. The outcomes from the various platforms that encompass stakeholder feedback identified several key themes:



Bourbon has a cultural effect and is more than a product



The anchor attractors are of a scale to drive national and international visitation



Investment in events has been valuable and a targeted strategy for growth should be pursued



The unique neighborhoods of Louisville are a source of community pride



Louisville's arts and cultural assets are dynamic and could be a source for growth



Transportation and connectivity for visitors is a need to service downtown and connect assets



Airlift should be a future focus for leisure tourism growth



Perception of crime, homelessness and safety will be a challenge to the overall image of Louisville

These key themes are a synopsis of the hundreds of stakeholder conversations and quantifiable feedback collected from the survey. These themes supported the development of many of the priorities to come later in this plan. The DSP process leveraged this feedback to then conduct significant research and validate direction for the future of the destination.



Market study

Market Study Components

The foundation of the DSP is built on a combination of market research and validation of stakeholder engagement and participation. The market research conducted for the Louisville Destination Strategic Plan included:

- **Comparable and competitive destination research**
- **Asset and amenities inventory and evaluation**
- **Event inventory and evaluation**
- **Hotel business mix review**
- **Assessment of overall destination landscape**

All of these elements included detailed research, collaboration with the Louisville Tourism team for data validation and vetting of outcomes against the stakeholder feedback received throughout the planning process. The value of the tourism and hospitality industry to Louisville Metro as a lead item came through in this research. The following are the outcomes from the Market Study.



Market Study Outcomes

Benchmarking

The first component of the market study was an in-depth analysis of Louisville against its competitive set. The competitive set included: Charlotte, Cincinnati, Cleveland, Columbus, Indianapolis, Kansas City, Memphis, Milwaukee, Nashville, Pittsburgh and St. Louis. An overarching theme of the outcomes is, when compared to the competitive destinations, Louisville is a consistent underdog.

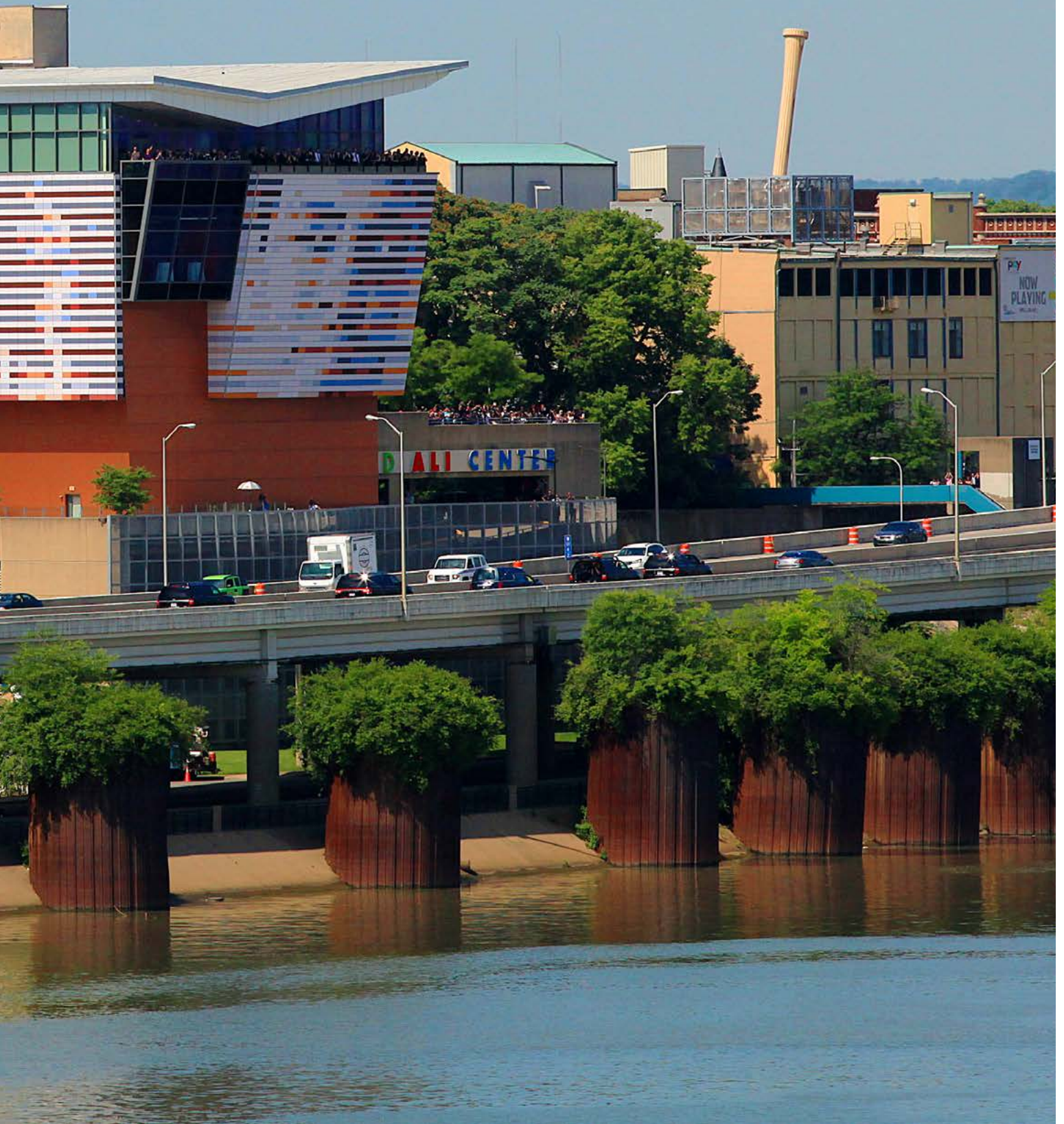
Louisville has the smallest population and one of the slower population growth rates. Additionally, Louisville has an older median age and a lower employment and household income growth rate. Louisville is among the lesser producing MSAs, with the second lowest GDP and the third lowest GDP per capita and is the slowest growing of the MSAs studied.

Comparably, the share of Louisville's hospitality employment is 12.4%, placing it in the middle of the comp set (average is 12.8%). Louisville's Hospitality sector is employing people at the rate of larger scale economies. The share of Louisville's GDP produced by the hospitality sector is equal to Indianapolis, Cincinnati, St. Louis and Charlotte and greater than Kansas City, Columbus and Pittsburgh. These aspects of macroeconomics when compared reinforce the importance, and reliance on the tourism and hospitality sectors to drive economic growth and employment for the Louisville Metro area.

Within the tourism and hospitality factors, Louisville compares and competes well. Louisville's downtown core scores an 82/100 for walkability, which is an increasingly important factor for visitors deciding on an urban destination. Additionally, the hotel inventory mix is strong and diversified representing a majority of chain scales and full vs. limited service properties. However, Louisville has the smallest inventory of total hotel rooms by comparison, leaving room for growth to compete for increasing convention business as well as overall visitor demand.



Louisville's tourism and
hospitality industry punches
above its weight.



Assets and Amenities Inventory and Evaluation

The destination is comprised of a variety of assets and attractions. The quantity and quality of these assets is significant, especially upon comparison. The DSP process included an inventory of these assets and an analysis of those key assets driving visitation on JLL's proprietary Attractor Scale.

The Attractor Scale serves to analyze the weight any individual asset has in causing the visitor's stay. The analysis is a multistep assessment of destination assets. The higher the score the more likely the asset is to drive incremental visitation. The multistep process included:

- **Utilize visitor traffic and flow data to assess current demand**
- **Place individual assets on scale based on eight criteria to score**
- **Rate anything that is a 60-70 or greater as Louisville's Attractors**
- **Utilize the outcome to identify future competitive position**
- **Recommend new investment or enhancement to grow assets on the scale**

The Attractor Scale includes eight key criteria with a total value of 100 points. Those assets and amenities scoring above a 60 are defined as attractors that cause visitation. The visitation draw is scaled from 60-70 as a regional draw, 80-90 as a national draw and 90-100 as a global draw. Competing for leisure visitation is increasingly competitive and the Attractor Scale outcomes help identify current positioning as well as opportunities for future concentration and growth.

This process identified that Louisville has a concentration of key assets scoring a 60+ on the Attractor Scale with Churchill Downs and the Kentucky Derby Museum scoring the highest at an 86, the combination of urban bourbon distillery experiences scoring an 83, the Louisville Slugger Museum and Factory scoring at 80. These assets alone are attractors capable of garnering interest and visitation at the national and even tipping the international scales. Additional regional attractors included Fourth Street Live! and the Muhammad Ali Center. This concentration of high-quality stand-alone assets combined with the variety and depth of experiences make Louisville a truly compelling place to visit.

The outcomes from this analysis supported the formulation of several priorities and subsequent recommendations on positioning Louisville for growth and driving new product development for the future.





Event Inventory Analysis

Similar to the asset inventory and analysis, a detailed focus on the existing events across the destination landscape was undertaken. Events are a critical factor in any tourism plan and often help introduce visitors to a destination for the first time. The DSP process included an analysis of the existing events using JLL's proprietary Event Matrix.

The Event Matrix utilizes criteria that cause events to drive visitation returns to understand the current landscape of events generating the desired outcome and position Louisville Tourism to support up and coming events to be successful. The process included:

- **Identifying key events currently serviced by Louisville Tourism**
- **Rating event on matrix using 13 criteria**
- **Identifying those events that can grow in specific areas through matrix outcomes**
- **Recommended work with organizers on tactics for implementation**

The DSP studied 31 of the destination's top leisure events driving a sustainable level of economic impact. While Louisville Tourism and the destination overall is host to hundreds of events in a calendar year, the concentration for the DSP was on the top events where economic impact is tracked and therefore how the Event Matrix criteria could be applied.

The outcomes from this analysis identified that there are five events receiving near perfect scores across the 13 criteria, with the Kentucky Derby being the top event. The music festivals that have been invested in including Hometown Rising, Bourbon and Beyond, Larger than Life and Forecastle round out the top five.

The priorities and recommendations are further supported through this aspect of event development as well as the role Louisville Tourism plays which are expanded upon.





Hotel Business Mix Review

The DSP process also looked closely at the hotel inventory and performance. As stated above, the benchmarking results showed that Louisville as the smallest inventory of the destinations studied, but continues to perform at a similar or better level than comparable destinations. To further understand that performance, the hotels were surveyed to gain insight on their business mix. The hotel business mix review surveyed 43 hotels in Louisville representing Downtown, East End, Airport, other neighborhoods and Southern Indiana.

When combined, leisure travel makes up 30% of the hotels' business mix according to the survey conducted during the DSP. The second largest segment representing 26% of the hotels' business mix was business transient. Followed closely by in-house group and Louisville Tourism conventions and meetings each representing 16% of the hotels' business. General leisure represented 9% of all hotel business followed closely by Churchill Downs based leisure at 7%, other event-based leisure at 8% and bourbon driven leisure at 6%. In total, leisure represents nearly 30% of all hotel business. Amateur/youth sports tournaments represent 7% of all hotel business and University sports groups rounding out the last 5%. The amount of leisure travel (30%) of hotel business is significant compared to other competitive markets. Typically, a higher level of business transient and in-house group is the foundation for many markets that then drive leisure on top to capture more significant ADR. In Louisville's case, the reliance on travel and tourism is the main segment driving hotel performance. This is important because it continues to reinforce the importance of this industry and the focus on leisure driven product development to sustain the growth in this market segment.

The additional opportunity for growth within this hotel business mix is the share of business Louisville Tourism's conventions and meetings effort drives. As mentioned in the Executive Summary, there is a parallel plan for optimizing KICC and ultimately increasing production which will drive incremental conventions and meetings room nights. Because business transient is low compared to competitive markets this presents an opportunity to grow the meetings and conventions share of over night stays in the future.

Priority areas

Workforce Development

Research Based Strategic Direction

One of the first challenges to the tourism economy that surfaced during the stakeholder engagement sessions was the need for a strong workforce. The benchmarking research identified that Louisville's tourism and hospitality industry was growing and employing people at a rate on par with larger economies in the competitive set including Indianapolis, Pittsburgh and Columbus. Additionally, the contribution to Louisville's GDP by the tourism and hospitality sector was equal to those destinations but struggled based on size and growth rate.

Based on the stakeholder feedback and research conducted during the DSP planning process, the need for workforce in all sectors of tourism and hospitality surfaced as a repeated theme. This included management level positions, tour guides and operators, hotel front and back-of-house roles including front desk clerks, servers, line cooks and maintenance staff. The kind of employment needs varied from managers to entry-level positions. Additionally, a unique attribute of the hospitality and tourism industry is that it is one of the few sectors that an entry level worker can maintain successful long-term employment without traditional credentials. Therefore, an investment in Louisville's workforce now at all levels provides an opportunity for sustainable employment across the Metro area's population who may not have had access to education and have limited employment options and are looking for increased opportunities.



Recommendation

Develop a joint program to train across all levels of employment needed in the hospitality and tourism ecosystem. This recommendation will provide a platform and pipeline for the industry to source quality talent and provide an opportunity for the local community to enter and remain in the workforce.

It is recommended that the program involve an experienced partner to execute and operate the program on a daily basis and work with trainees. This partner will be critical as their role is not only to provide the training, but to stay engaged with the trainees once they graduate the program to ensure their role is sustainable and the trainee remains gainfully employed in Louisville. The DSP process identified that the Urban League has experience in operating similar workforce development programs, and it is recommended that this program be developed in conjunction with them as the main partner. Additionally, there will be other community organizations with experience in this area including Jefferson County Public Schools, Kentuckiana Works and Goodwill among others that can be an added resource as the program is developed. These partners should be explored and gathered to leverage the benefits for the future workforce development program.

It is recommended that this program has five to seven core focus areas. Samples of those areas to include are below:



**Front line
hospitality
training**



**Service
training and
standards**



**Food handling
preparation and
processes**



**Computer and
point of sale
system training**



**Executive leadership
training**



**Management
skills**



**Public speaking
& tour training**

It is recommended that partners in the local high school and higher education systems be engaged to provide programmatic elements as well as be a pipeline for trainees. Technical school training for engineers and maintenance staff should also be considered for inclusion based on availability.









COVID-19 Implications

While workforce development was a priority prior to the COVID-19 global pandemic that dramatically impacted the industry nationally and locally in Louisville, the resulting economic effects has caused many to lose jobs over the last several months. Exacerbating this economic effect, many economists project that up to 42% of those jobs lost may never come back according to a recent Forbes article. At the local level, more than 670,000 Kentuckians have filed for unemployment over the last several months – equivalent to all of Louisville’s population according to the Courier Journal. With this in mind and knowing that the local economy relied so heavily on tourism and hospitality as it was already, there will be many with experience in this industry looking for work in new ways and many others that may be looking to hospitality for the first time. It will be important to jump start this program knowing the return to travel will mean ramping up employment locally as pent up demand from Americans increases the need to staff up quickly when the industry is able to will be critical.



Diversity & Inclusion

As mentioned above, hospitality and tourism as an industry is a major employment sector within the Louisville Metro area. As the industry has grown rapidly the needs across the sector for talent and labor have been strained. In order to create a robust training program to be a pipeline for the industry, the DSP recommends being intentional and deliberate about reaching into the community to teach and train across all areas of the industry. Additionally, this training can also provide insight and guidance with a sense of entrepreneurialism for black-owned businesses in this space. Additionally, hospitality and tourism is often an industry that enables entry level employees to get a start and learn the foundations of hard work and service that provides a platform for new and different career opportunities. This workforce development program can and should be targeted to reach into underserved communities. This ability to get job-ready training, enter the workforce, remain employed and move up through the industry is much needed in Louisville for its stakeholder businesses looking for quality talent and for community members looking for work.

Milestone action steps

● 2020

- Create working committee with partners identified below
- Identify initial demand areas and service lines i.e. hotels vs. restaurants vs. attractions and roles within

- 2021

- Develop program components
- Identify funding models
- Implement program in place for initial demand areas with operations partner
- Prepare to scale program up both in capacity and in service line training areas

- 2022

- Expand program for additional demand areas
- Begin to report on program outcomes and measure success





Partners

As mentioned throughout this plan, the DSP is a destination-wide effort and the priority areas all have initiatives that require multiple partners to collaborate and work together in order to implement and realize success. The workforce development priority will require partners from the Kentucky Restaurant Association, Louisville Hotel Association, Greater Louisville Inc., Louisville Tourism, and the Louisville Urban League as well as the local education systems and Kentuckiana Works. These partners will each have a role to play:

Partner	Role	Detail
Louisville Tourism	Facilitator, convener and stakeholder interface	+ Manage engagement and keep tasks moving. Louisville Tourism will also be tasked with interfacing with stakeholder businesses upfront to vet programming needs
Louisville Urban League	Program manager and operator	+ Build, manage and operate the final program on a day-to-day basis
Jefferson County Public Schools	Program support as needed	+ Provide data and support program implementation
Kentuckiana Works	Program support as needed	+ Provide data and support program implementation
Kentucky Restaurant Association (Louisville)	Data provider, stakeholder needs, potential funder	+ Support the program development by vetting program needs
Louisville Hotel Association	Data provider, stakeholder needs, potential funder	+ Support the program development by vetting program needs
Greater Louisville Inc.	Economic Development arm, advocate and tax/grant fund source	+ Similar to the role with Mobility & Connectivity – support the program's development and provide insight into funding opportunities

Mobility & Connectivity

Research Based Strategic Direction

The Louisville Metro area was designed to be a commuter city, heavily reliant on workers driving in and out of the city in their own individual cars. Every other street is one-way directional traffic connecting to the major highway systems that are meant to get commuters in and out of the city. While this strategy has served Louisville well as the city developed from the mid 20th century, walkability, mobility and connectivity are now the needs of the city and community and both visitors and residents are looking to explore and enjoy the city's assets.

Based on the stakeholder feedback and research conducted during the DSP planning process, the need for transportation solutions emerged as a key priority. Transportation solutions between neighborhoods was the number one response in the DSP stakeholder survey with over 300 respondents identifying that issue as the biggest missing piece for Louisville as a destination. Additionally, the benchmarking results indicated that of the comparable destinations studied Louisville was in the top five of destinations with the greatest population within 300 miles, and while Louisville is surrounded by this population it was one of only two destinations in the 12 cities studied that did not have a transportation solution i.e. light rail or street car system. This research indicates the need for a solution related to mobility and connectivity.



Recommendation

The recommendation of the DSP is to develop a public-private model for a multi-phased mobility and connectivity solution. It will be critical for Louisville's future growth as a community and destination to connect the visitor assets and amenities across the community. This will increase and improve the visitor connectivity and improve quality of life for residents to live and work downtown and in the surrounding metro neighborhoods.

It is recommended that this P3 transportation model have three phases. The first phase would include the Louisville Muhammad Ali International Airport to downtown with stops along the major points of interest. It is recommended that this first phase be completed off of the interstate system and run down 3rd and 4th Streets to provide stops at Churchill Downs and the Kentucky Derby Museum, University of Louisville, Old Louisville neighborhood and provide a connection point directly into downtown and connect the initial demand points for adjacent downtown neighborhoods i.e. Old Louisville and NULU. This first phase is critical in connecting visitor arrivals from the airport. Additionally it would also provide an opportunity to move workers to the airport and UPS as it was identified that TARC has limited service hours in the mornings and evenings and employers at the airport and UPS have had difficulty with employees as the demand for the airport increases and the hours extend beyond TARC's capacity.

The second phase would include connecting downtown assets based on demand for visitation. The research results from the DSP process identified that the key "stops" in the second phase should include connecting visitor amenities and assets i.e. KICC, Marriott and Omni hotels as well as other hotels in the downtown core, Louisville Slugger Museum & Factory, downtown bourbon distillery experiences, Fourth Street Live! and Waterfront Park. This phase of the mobility and connectivity plan provides the opportunity for "stops" along key points of interest based on visitor research.

The third phase would include extending and connecting the neighborhoods identified as upcoming demand generators for visitor experience as well as community/residential connectivity. Old Louisville and NULU are connected in Phase One. This phase would connect Butchertown, Germantown, Smoketown, Old Louisville, Portland, Shively, Shawnee, Paristown Point, Highlands, Russell, Crescent Hill and St. Matthews and Jeffersontown. Additionally, the connectivity with Southern Indiana should be considered in this phase as the walking bridge has increased pedestrian connectivity and the Indiana neighborhoods are developing to grow a shared demand for the Louisville-Southern Indiana experience. Louisville Metro has 89 cities and communities within the metro area and while not all communities may initially be part of Phase Three of this recommendation, the partners identified should work collaboratively to determine how wide of a net to cast for including neighborhoods and communities identified outside of the DSP process as a service area need.

The additional benefits of this recommendation beyond the obvious of increased connectivity between these key points of interest, include reduced reliance on individual vehicles lessening traffic and congestion. Additionally, this type of mobility and connectivity plan opens up new opportunities for increased spaces for pedestrian movement i.e. scooters, bike share, etc. for visitors and residents alike. Through the DSP process it was discovered that the average scooter ride in Louisville was over a mile. Visitors and residents are using these amenities to enhance their experience through these alternative modes of pedestrian travel. With this increased pedestrian connectivity comes increased visibility of and access to community small businesses i.e. restaurants, retail and more. With access to these modes of transportation and dedicated planning to enhance the experience, the visitor dollar is not only spread further through the community but is also likely to capture more of those visitor dollars by providing the mobility and connectivity to experience more of what Louisville has to offer.



Milestone action steps



2021

- Kick off Mobility & Connectivity working committee with the partners identified below
- Finalize recommended “vehicle” type i.e. Street Car or Trolley
- Identify funding sources i.e. federal grants, tax credits, local public sector and private sector partners
- Identify pricing structure and model for riders i.e. visitor day pass cost, commuter monthly cost, individual ride ticket cost, etc.
- Finalize phases with points of interest “stops” and routes
- Begin process to build P3 model (RFP/ public procurement compliance)



2022

- Finalize P3 model and deal structure
- Map out plan for implementation



2023

- Implement model for Phase 1



2024

- Implement model for Phase 2 and Phase 3



2025

- Consider expansion plans for additional connection points and phases

Diversity & Inclusion

Underserved areas often struggle with mobility and connectivity. This is an opportunity to ensure the underserved workforce have the ability to get to and from their place of employment safely and effectively. As stated above, TARC has struggled to keep up service with demand in key areas i.e. airport hours, which in turn restricts or eliminates altogether the ability for some employees to get to work. This area of workforce is addressed as a separate priority of the DSP as well, but is important to note here as mobility and connectivity affects how the community's workforce can grow and thrive.

Partners

As mentioned throughout this plan, the DSP is a destination-wide effort and the priority areas all have initiatives that require multiple partners to collaborate and work together in order to implement and realize success. The mobility and connectivity priority will require partners from Metro Government and Metro Council, Greater Louisville Inc., Louisville Forward, Louisville Tourism, the Louisville Downtown Partnership, TARC and the private sector. These partners will each have a role to play:

Partner	Role	Detail
Louisville Tourism	Facilitator, convener and data provider	+ Manage engagement and keep tasks moving. Louisville Tourism will also be tasked with providing visitor data on points of interest
Greater Louisville Inc.	Economic Development arm, advocate and tax/grant fund source	+ Alignment with GLI's strategic planning initiative to identify neighborhoods/communities that should be connected to mobility plan and identify federal, state and local tax incentives and grant opportunities for funding
Louisville Downtown Partnership	Data provider	+ Recommend connection points based on density and neighborhood planning
TARC	Data provider, potential funder	+ Based on available ridership data from mass transit system, share information to enhance mobility plan, potential source for funding to alleviate pressure on existing TARC programs
Louisville Metro Council & Government	Potential funder and advocates	+ Tap into the public sector funds to seed project and advocate with local community partners and at the state level
Louisville Forward	Economic and community development considerations, advocate and tax/grant fund source	+ Similar role to GLI to recommend enhancements, stops. Also identify funds or incentives where possible
Private Sector	Potential operator and funding partner	+ Identify partner(s) in the private sector with interest and capacity to operate and manage the plan while also being an active participant in the P3 model financially

Bourbon Connection

Research Based Strategic Direction

Louisville has increasingly become known as a destination for bourbon over the last several years with bourbon-driven travel representing roughly 15% of all visitors to distillery experiences, according to the Arrivalist data that Louisville Tourism tracks. This 15% represents a significant portion of visitors coming to Louisville for this specific experience. Bourbon-driven travel has seen an explosion over the last five to seven years with new distilleries opening in downtown supplementing demand for the Bourbon Trail.

Additionally, stakeholder feedback repeatedly surfaced the importance of bourbon as a product and a brand pillar as a key theme of the DSP process. This reinforces the notion that bourbon is both a unique attribute to Kentucky and to Louisville and is generating demand on its own causing distillery experiences to be at max capacity most weekends through the year. However, while most everyone saw value in bourbon there was an underlying concern over how connected or aligned particular businesses could and should be as bourbon at the end of the day is an alcohol consumer product. The value that bourbon brings to Louisville extends beyond the product and beyond consumption and is an inherent part of the history and culture of the community as a craft that tells a unique story that Louisville has an opportunity to share beyond the product itself.

Recommendation

The recommendation of the DSP related to bourbon is to create a “kit” that helps business connect to aspects of bourbon, that envelopes the story and craft of the history, culture, process and product which will enable non-bourbon businesses to make a connection to this brand pillar. Additionally, this initiative will ensure that the industry grows horizontally with more touchpoints across the destination and not just vertically with more of the same “product” and experiences.

The potential for bourbon to be more than a product has the potential to enhance the fabric of the destination. The recommended “kit” would provide any new business license holder with a packet of information on bourbon, the distilling process, importance of Louisville’s water, stories from history that impacted Louisville’s development and impacted other industries i.e. logistics and shipping using the Ohio River and others.

The purpose of the kit would be to further embed the bourbon culture into the visitor community. To locals and generations of families who have lived in Louisville this is obvious as aspects of bourbon have been part of their lives for as long as they can remember. Everyone has a bourbon connection locally. The DSP recommends bringing those stories to the forefront and making those connections that are part of the local culture now part of the visitor experience in the future. This is meant to not only make the connection for non-bourbon businesses but also to strip the layers of bourbon as a product and make the process more available to connect with to expand on the authentic story as well as support marketing messaging. For example, if a tie-dye store wanted to open they would receive the “kit” and know that the limestone filtration of the water that occurs naturally under Louisville is a critical part of bourbon distillation is what makes the shirts’ color more vibrant. This connection to the process and the natural resource brings the brand pillar into a non-bourbon related business.

Another example is the overall theme of bourbon being a hand-made and crafted process which is brought to life in many of the existing Louisville visitor center products as most are local and hand-made. This is an overall representation of the retail offerings in Louisville that should be preserved and enhanced as that connection to makers and crafters is an inherent connection as well. Additionally, it is important to note, that not every business can and will participate in this process as the connection to bourbon is not one-size fits all and diversity in offerings will be important. This is, however, meant to help those businesses make the connection and not be afraid of leveraging bourbon because it is an alcohol as Louisville’s culture has proven it is much more than that.

While this recommendation is geared to support non-industry businesses make a subtle bourbon connection, the bourbon industry is and will remain a core focus of the tourism industry for years to come. In addition to the “kit” it is also recommended that the bourbon experiences are preserved and enhanced for visitors. Marketing and programming for leisure and group alike should include the bourbon experiences and the bourbon experiences need to be tied into the primary product offerings.



Milestone action steps

• 2020

- Form working committee with partners identified below

• 2021

- Leverage existing resources to compile packet information (KY Bourbon Economic Impact Study, Mayor's Food and Bourbon workshop, Global Identity work and the resources of the KDA)
- Identify initial targeted businesses for inclusion
- Work with Metro Gov. on business license processes and "kit" process
- Develop "kit" to include resources for businesses

• 2022

- Work with businesses in non-tourism industries on making the connection
- Host workshops for businesses making the connection

• 2023

- Consider impact on overall brand for Louisville i.e. "Louisville, KY, the uniquely American Spirit" or something that brands Louisville and envelopes bourbon while still being more than that. At this point in the program multiple new businesses will have been involved as well as those core industry and tourism business. The connection to unique and American spirit could play into how Louisvillian's take pride in talking about their city in the future
- Expand program to include additional industries

• 2024

- Create an incentive to foster the relationships with the non-industry and non-tourism businesses i.e. awards for best connection, most creative, etc.

• 2025

- Report on inclusion and associated impact at the five-year mark



COVID-19 Implications

While the industry is still suffering and struggling to regain its momentum due to closures and lack of travel, it will return. The travel industry, especially the drive market, is already seeing impacts from the pent up demand across the country. As Louisville is within a day's drive of a significant portion of the US population, there will be opportunities to capture this demand and expand on new feeder markets for Louisville coming out of COVID-19.



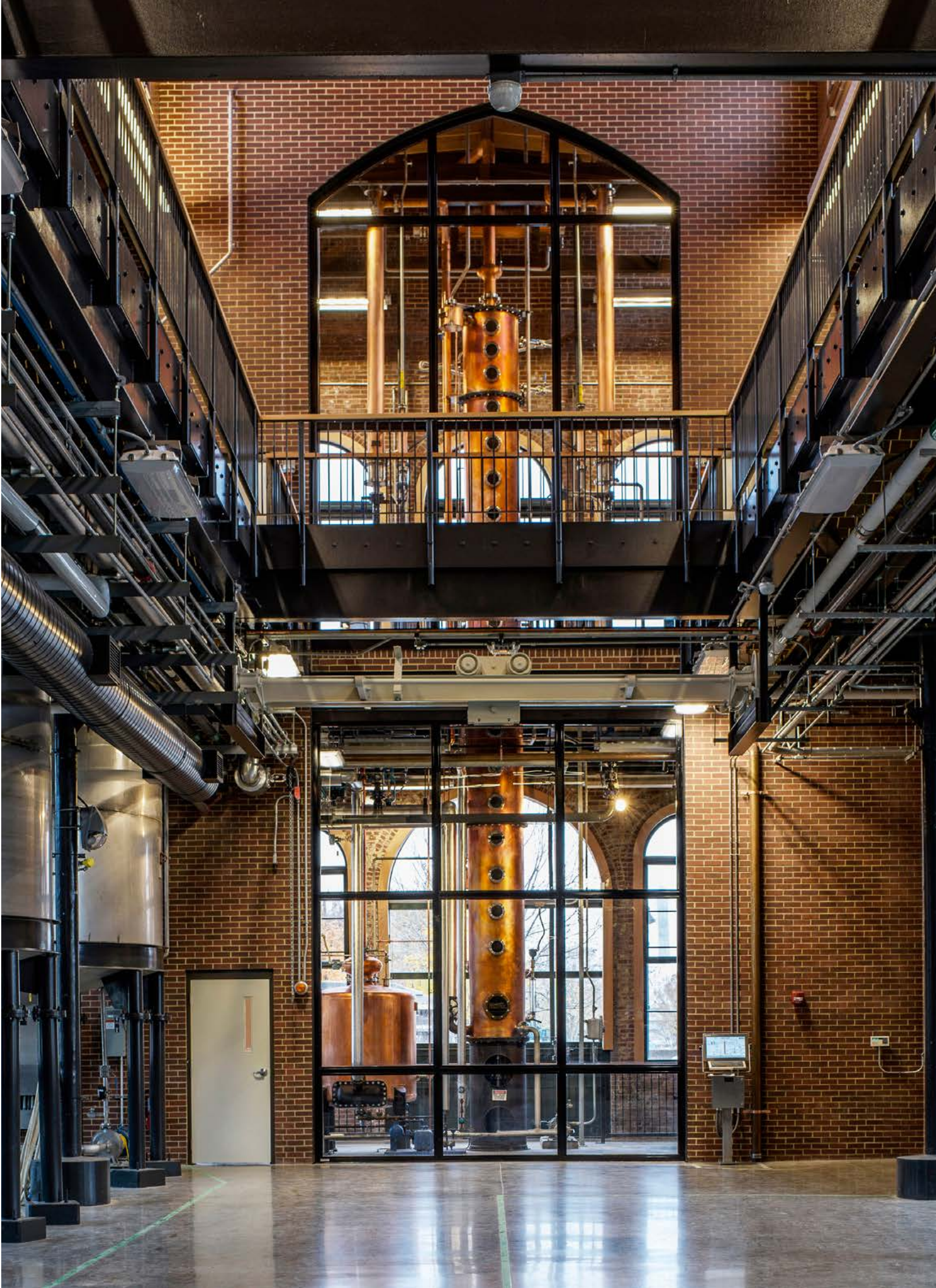
Diversity & Inclusion

It will be important both in the recommended business "kit" as well as in the industry to tell the story of African Americans in the bourbon industry and their contributions to its history and development. Additionally, black owned businesses and the development of product in historically black neighborhoods have been mentioned in other aspects of the DSP but are also important here with the development of bourbon related products. Louisville Tourism's Black Tourism Advisory Council will also play a key role in this process. Additionally, marketing those stories and products to new target audiences should be built into Louisville Tourism's future marketing plans.

Partners

As mentioned throughout this plan, the DSP is a destination-wide effort and the priority areas all have initiatives that require multiple partners to collaborate and work together in order implement and realize success. The future of bourbon priority will require partners from Louisville Tourism, Louisville Forward, Greater Louisville Inc., Kentucky Distillers Association, Bourbon District and Louisville Downtown Partnership, elected officials and the private sector. These partners will each have a role to play:

Partner	Role	Detail
Louisville Tourism	Facilitator, convener and data provider. Leading the working committees. Leader in visitor marketing efforts	+ Manage engagement and keep tasks moving. Louisville Tourism will also be tasked with providing visitor data as needed. Deploy committee members with respective tasks
Greater Louisville Inc.	Lead for business engagement processes and template provider for business licensees	+ Project manage the business license “kit” development with support from Louisville Tourism on marketing language
Louisville Forward	Support business engagement and packet development	+ As food and beverage is an existing cluster and focus area, support business engagement and business needs
Bourbon District & Louisville Downtown partnership	Support business engagement	Represent and liaise on behalf of the businesses in the District
Urban Bourbon Trail members	Support business engagement	+ Represent and liaise on behalf of the businesses on the UBT
Kentucky Distillers Association	Data provider, liaison to distilleries, advocate and lobbyist for industry	+ Active participant in business engagement
Elected Officials/Metro Gov	Elected leadership for support	+ Navigate and support/approve business engagement process as needed



Neighborhood Preservation & Development

Research Based Strategic Direction

Louisville Metro is comprised of a combination of 89 cities, communities and neighborhoods, each with unique and distinct experiences from one another. Those neighborhoods are what give many who live in them pride in Louisville. While Louisville has incredibly visible and unique visitor attractions like Churchill Downs and the Kentucky Derby Museum and the Louisville Slugger Museum & Factory as well as a growing bourbon tourism scene, the local community is most proud of its storied neighborhoods.

Stakeholder feedback and engagement within the neighborhoods as well as the comparative research conducted surfaced this opportunity to focus on neighborhood preservation and development as an outcome of this process because of the unique neighbors that make up the community fabric of the Louisville Metro Area. The stakeholder survey specifically asked a series of questions about comparing Louisville assets to others as well as what they were most proud of and the response indicated the neighborhoods were both an amenity and attraction themselves as well as a source of pride for residents.





Recommendation

The recommendation of the DSP is to utilize art installations of a significant scale to identify and represent the neighborhoods as an expansion on that community pride for visitors to experience. The ability to showcase experiences within Louisville's different neighborhoods provides a platform that is unique to Louisville and one that stakeholders continued to support. The investment, continued development and identification of those neighborhoods through potential art installations will be a significant project to work across diverse communities to elevate the neighborhood's profile while preserving the culture and integrity of the particular area.

The goal is to identify a partner to execute a program through a national and even international call to artists to implement this concept through art. Louisville's Commission on Public Art has begun an initiative in parallel with the DSP process to work with neighborhoods and community groups on identifying what art means to each respective area. This groundwork could be the foundation to soliciting large scale public art installations to achieve this. This initiative not only furthers the community pride element but also continues to distinctly identify our unique neighborhoods through a visual and physical amenity that visitors can experience and also identify with.

It is recommended that the initial neighborhoods mirror those in the Mobility & Connectivity priority including, NULU, Old Louisville, Downtown, Butchertown, Germantown, Smoketown, Portland, Shively, Shawnee, Paristown Point, Highlands, Crescent Hill and St. Matthews and Jeffersontown. Additionally, consideration should be given to the Bourbon District and Museum Row on Main to ensure the visual work is complementary where possible and not duplicative.

Discussions on this initiative around the "call" for artists, again requiring scale on the national and international stage, could be through a competition to win the work. The selected artists would be required to review any existing research, including outcomes from the DSP as well as work the COPA has already done with neighborhood groups as well as conduct their own research and town hall style meetings to be embedded with the local community. Additionally, the selected national/international artists could be paired with a local artist for implementation. This furthers the notion that Louisville has a community of crafters where things are handmade and done with care, again providing a further source of community pride.

From a fundraising standpoint several stakeholders have supported the overall notion of this initiative and have reiterated the importance of scale. Additionally, the Fund for the Arts and the Arts and Cultural Alliance should be part of the program's development, sourcing and execution.





Milestone action steps



2020

- Kick off Neighborhood Preservation & Development working committee with the partners identified below



2021

- Finalize lead partner in execution
- Confirm neighborhoods for inclusion in initial program and call
- Begin collaborative fundraising campaign across arts institutions for private dollars
- Identify grant opportunities and public funding sources
- Develop “call” to artists to be released through execution partner
- Identify local artists participation (may require second “call” to artists)



2022

- Select initial artists and pair with neighborhoods and local artists
- Set artist timelines for community engagement to design and develop visual art plan
- Finalize sites for implementation
- Begin first round of installation – target 3-4 installations/neighborhoods per year



2023

- Begin second round of installations – target 3-4 installations/neighborhoods per year



2024

- Begin third round of installations – target 3-4 installations/neighborhoods per year



2025

- Begin fourth round of installations – target 3-4 installations/neighborhoods per year



2026

- Begin fifth round of installations – target 3-4 installations/neighborhoods per year
- Identify neighborhoods to add beyond initial 14 recommendations for inclusion



COVID-19 Implications

This downturn in the travel and tourism sector may provide the opportunity to focus time on developing the program and “call” to artists. Additionally, and although this is a challenging time financially and for the economy, this may also provide an opportunity to source initial fundraising through key partners and individuals. There could also be the opportunity, pending funding, to inject some positivity into the community and put people to work through this project in the first year to two years and help stimulate the local economy through this project.



Diversity & Inclusion

This priority presents an opportunity to recognize, represent and preserve history, culture and tell unique stories of the neighborhoods. Their pasts, present and future ambitions can be represented through this artistic expression. This would include a concerted effort to represent historically black and underserved communities, bring diversity and representation into the artists participation and ultimately recognize those diverse neighborhoods for future visitors to see and experience.

Partners

As mentioned throughout this plan, the DSP is a destination-wide effort and the priority areas all have initiatives that require multiple partners to collaborate and work together in order implement and realize success. The Neighborhood Preservation & Development priority will require partners from the Commission on Public Art, Fund for the Arts, Metro Government and Metro Council, Louisville Forward, Louisville Tourism, the Louisville Downtown Partnership, Arts and Cultural Alliance, neighborhood associations and the private sector. These partners will each have a role to play:

Partner	Role	Detail
Louisville Tourism	Facilitator, convener and data provider. Interface with neighborhood leads.	+ Manage engagement and keep tasks moving. Louisville Tourism will also be tasked with providing visitor data on points of interest
Commission on Public art	Potential program lead/executor	+ Lead program development with partners and manage project, also potential funding source
Fund for the Arts	Program partner and potential fundraiser	+ Support development of art program and leverage network for fundraising
Arts and Cultural Alliance	Program development support	+ Identify local artists to support program implementation
Louisville Downtown Partnership	Data provider, program development support	+ Recommend sites and people to be involved based on density and neighborhood planning
Louisville Metro Council & Government	Potential funder and advocates	+ Tap into the public sector funds to seed project and advocate with local community partners and at the state level for funding and program sustainability
Louisville Forward	Economic and community development considerations, advocate and tax/grant fund identification	+ Support program development and identify areas of opportunity for grants and funding sources
Neighborhood associations	Program development support, community engagement and site selection	+ Work with program partners to develop touch points with community, liaise with selected artists and support site selection
Private Sector	Funding partners	+ Identify partner(s) in the private sector with interest and capacity to support the program financially



Economic Development

Research Based Strategic Direction

As stated throughout this plan, the interconnection between the tourism and hospitality industry and a destination's overall economic landscape is critically important. This became especially clear through the DSP process as Louisville's tourism and hospitality sector provides significant employment opportunities for local community members, generates millions in economic impact and drives the overall visibility and recognition of the city as a place to live, work and play. The value of tourism and hospitality within Louisville as a destination became even more clear as the economic effects of COVID-19 abruptly paused the industry's momentum.

Additionally, Louisville's Metro Government and business community is committed to growing the local economy through investments in key partners like Louisville Forward as a division of Metro Government, Greater Louisville Inc., Louisville Downtown Partnership and many other organizations whose goal is to continually evolve and grow the community. The timing of this process was fruitful also because Greater Louisville Inc. conducted their own parallel strategic plan. Several key areas of both GLI's plan and this DSP overlap including Mobility & Connectivity and Workforce Development and talent retention. All of the efforts from the DSP process were developed strategically and inherently benefit the overall economic development strategy for the community as a whole. This concerted effort was not only research-based but also a key theme from stakeholder conversations and many recognized and reinforced the importance of the cross collaboration and synergies between tourism as an economic driver for greater community benefit.





Recommendation

The recommendation of the DSP is to develop a shared strategy to recruit new businesses, talent and ultimately convert new visitors and residents through a joint initiative to market and sell Louisville in specific geographic and demographic segments. Both tourism and economic development dedicate resources to creating marketing strategies to reach respective audiences. There are areas where those audiences overlap and the efforts can be mutually beneficial. The recommendation specifically drives at a shared strategy where economic development is recruiting talent and those visitor markets are a match to join forces for marketing initiatives.

There should be an establishment of roles and responsibilities across the collaboration to include, marketing assets and collateral, identified target markets, deployment of resources and marketing plan development and execution.

The community at large continues to make progress in economic development but often looks to tourism and hospitality to be a lead item when selling the area as a great place for future talent to live and work. With this in mind, it is recommended that shared tools for visitor and talent marketing be developed. For example, interactive maps to highlight neighborhood assets and things to do benefit both audiences and can be customized to create itineraries for visitors to explore the city if a recruiter is talking to new talent and competing with cities like Indianapolis, Nashville and Austin.





Milestone action steps



2021

- Kick off Economic Development working committee with the partners identified below



2021

- Develop elements of collaborative marketing efforts to include roles and responsibilities
- Refine list of existing marketing assets to be shared
- Develop target market list to include cities that are experiencing an exodus due to COVID-19
- Initiate and establish “tools” i.e. asset map
- Finalize marketing plan
- Launch aspects of marketing plan specific to cities and communities experiencing an exodus due to COVID-19 for visitation and recruitment



2022

- Create marketing/content calendar for joint economic development and visitor conversion pieces and PR
- Launch full joint marketing campaign efforts in collaboration



2023

- Determine reporting methodologies to track conversion



2024

- Continue to implement strategies



COVID-19 Implications

The implications of COVID-19 has significantly slowed many aspects of the local, regional and national economy. However, like several other priority areas of the DSP this slow down provides both an opportunity as well as a need to work collaboratively. Tourism has been leveraged in economic development previously, but this concerted effort to develop a shared marketing plan with shared resources should be done now while the economic recovery begins across the community and nationally. More specifically, this could provide an opportunity to recruit talent to live and work in Louisville whether or not that talent is employed locally. As many millennials take this opportunity to escape city life, explore other parts of the country and put down new roots Louisville could be attractive for its quality of place, value of the dollar, visitor amenities, neighborhood feel and many other reasons. This possibility should be explore through the partners identified below.



Diversity & Inclusion

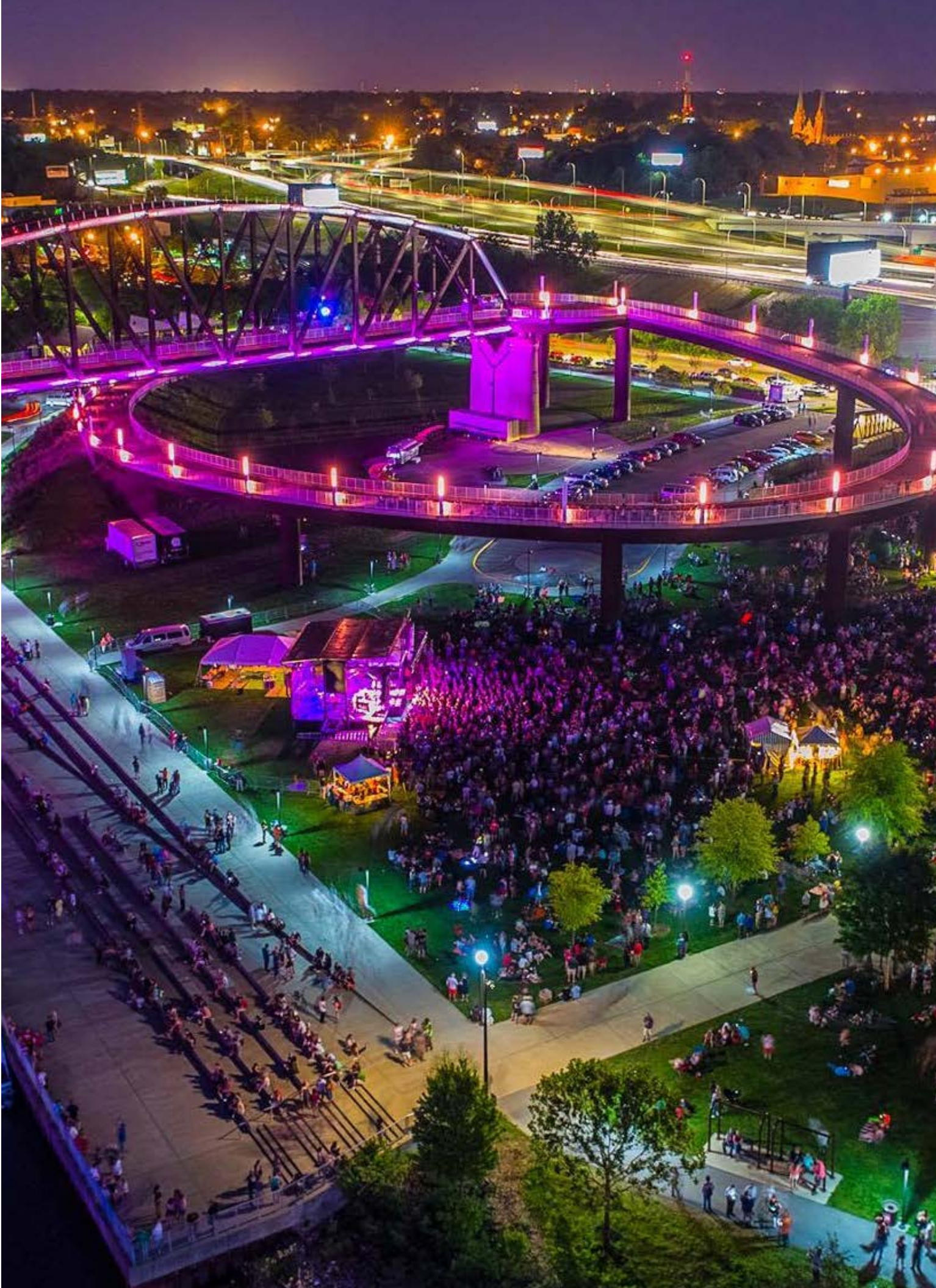
Part of the focus of the business and talent recruitment plans can and should include the intentional recruitment of diverse leadership positions. Similar to the Workforce Development and Mobility & Connectivity sections, the Economic Development priority presents the opportunity to intentionally develop and drive business into existing diverse businesses across the Louisville community. Additionally, there should be focus on supporting new entrepreneurial opportunities to open diverse business and tell those diverse business stories.

Partners

As mentioned throughout this plan, the DSP is a destination-wide effort and the priority areas all have initiatives that require multiple partners to collaborate and work together in order implement and realize success. The mobility and connectivity priority will require partners from Greater Louisville Inc., Louisville Forward, Louisville Tourism and the Louisville Downtown Partnership. These partners will each have a role to play:

Partner	Role	Detail
Louisville Tourism	Facilitator, convener and data provider, visitor marketing, asset development and keeper of collateral	+ Manage engagement and keep tasks moving. Louisville Tourism will also be tasked with providing visitor data on points of interest. Specifically Louisville Tourism will be responsible for the marketing related assets and collateral including photo and video assets and anything related to visitor marketing and consumption
Greater Louisville Inc.	Economic Development partner	+ Partner in initiative related to target industries, target markets for talent recruitment and program development





Product Development

Research Based Strategic Direction

Louisville has significant and highly visible demand generators that attract visitors across target markets and geographies. The DSP studied individual leisure assets and attractions as well as events, conventions and meetings to understand the full landscape of visitor demand across the entire destination product offering. These individual assets that scored the highest on the Attractor Scale i.e. Churchill Downs & Kentucky Derby Museum, the combination of urban bourbon distilleries experiences and Louisville Slugger Museum & Factory all have national recognition and demand. Additionally, several of the events studied, the Kentucky Derby being the most significant followed by four large music festivals, drive significant visitation to the destination.

Product Development is broken into three primary categories: Assets & Attractions, Events and Sports. Assets and Attractions, for this purpose, are defined as any visitor-facing amenity promoted or marketed to travelers for experiences in Louisville today. This would include everything from Churchill Downs and the Kentucky Derby Museum to Waterfront Park and everything in between. In parallel to the DSP process a separate study was conducted on the Kentucky International Convention Center (KICC) and the results of that study focus entirely on the conventions and meetings market for Louisville at KICC. The results of that study can be implemented in tandem with the DSP. The research conducted leveraging the Attractor Scale and Event Matrix tools during the DSP process identified that Louisville has demand drivers in those categories but that there is also room for growth and improvement in existing products and new assets and events to drive incremental demand to the destination. Stakeholder conversations and feedback confirmed this opportunity that the research identified. Additionally, the sports segment, while having been a successful demand generator for overnight stays, needs enhanced product to remain competitive in the future.



Recommendation

Assets & Attractions

The recommendation of the DSP specific to assets and attractions is to implement the Attractor Scale tool that was applied in this process to inform existing assets and new developers/investors as to how best to scale an asset to be visitor facing and drive new demand to Louisville. The importance of the criteria is that it ensures a focus on combined results to scale for Louisville. The leisure market is highly competitive and in order to have success with the target markets for Louisville, the destination will need to ensure that the assets and attractions remain competitive.

While the Attractor Scale is focused on understanding where the assets and amenities are positioned today, it highlights where there are strategic opportunities to work with those assets to better grow their impact on the destination. A proactive example of this process would be Louisville Slugger Museum & Factory. While the asset itself scored an 80/100 on the Attractor Scale making it a nationally compelling attractor, the Museum's leadership was already in the process of thinking about product enhancements during the time the DSP was conducted. This process enabled the Museum's leadership to vet their plans against the overall destination landscape and the Attractor Scale criteria to prioritize their next steps for visitor-facing enhancements to the attraction.

Additionally, this criteria can support existing assets that desire to be visitor facing, but struggle to capture their "fair share" of the visitor market. This recommendation will enable Louisville Tourism to work collaboratively with the asset's leadership to think through the product and programming development needs for the future.

The Attractor Scale also helps identify where there are leverage points and connection points across the assets and attractions that are part of the fabric of Louisville as a destination. For example, the Attractor Scale did not originally include the collection of neighborhoods that Louisville has, which is now its own priority area with a set of recommendations. Now that this is a focus of the DSP, a sample neighborhood was placed on the scale to highlight the current positioning and potential. The sample was the NULU neighborhood which scored a 62 on the scale making the neighborhood a regional demand driver on its own. This highlights where there are strengths for NULU as well as where there are potential opportunities for strategic growth and product development. There is an opportunity as the DSP is implemented and the destination grows to utilize the Attractor Scale in geographic pockets of the community to concentrate the focus on particular areas for development and work with community leaders locally to strategically see new assets developed. Additionally, this tool should be leveraged to impact the diversity and inclusion initiatives to positively impact historically black neighborhoods with new product to tell their stories. Also, underserved neighborhoods in need of development should be reviewed through this lens to spur product development and provide increased opportunities for inclusivity and participation in the tourism economy and its benefits.

Events

Similar to the Attractor Scale criteria, the Events Matrix is a tool that was applied in the DSP process and it is recommended that this tool be implemented to support existing events growth and ensure new events that desire to be visitor-facing are planning with these aspects in mind. The Events Matrix will provide a platform for event organizers to understand what is most important to the tourism and hospitality industry in Louisville as they plan to grow and also support Louisville Tourism and its partners in providing a level playing field for event organizers to come for support whether that be in funds or in-kind marketing support or staff resources. Additionally, Louisville Tourism has invested in research tools that were leveraged in this research and should continue to both analyze events with those research tools as well as make the data available to event organizers to enhance their programming.

It is recommended that this tool be integrated into the Community Investment Committee (CIC) program that already exists as the platform by which events are reviewed and decisions are made. Louisville Tourism's Community Investment program shall be used solely to market tourism related projects (festivals, events, studies, media assistance, etc.) that occur within Louisville/Jefferson County, Kentucky. These projects must draw out of town visitors and attract overnight stays in hotels. When the Event Matrix tool is implemented successfully, event organizers are able to build programming that achieves success around the criteria and demonstrates to the industry that there is tangible return on investment. Additionally, this tool can be utilized and customized further to support considerations around seasonality and need periods for future years or short-term opportunities. When this is implemented and Louisville considers its events within the landscape of all the activity and action that takes place in a calendar year; the tool can be highly effective when thinking through event placement as well as building/curating adjacencies around successful events to further the impact of that event in that time period.





Sports

It is recommended that a singular multi-sport complex be developed in order to successfully compete and capture the high value youth sports tournaments. The multi-sport complex will need a concentration of quality flat, rectangular fields as the priority for soccer and lacrosse. The complex will need between 12-20 fields to be competitive. Additionally, baseball and softball diamonds would be the second priority. In order to be competitive in youth sports, the product requires quality field concentration. Currently, there are several sites where fields exist however they are not concentrated in a singular location and the quality would need to be improved. Additional considerations should be given to the site for a singular complex to include the ability to add amenities and enhancements for spectators and families.

At the time of the DSP process, there were several sites that had been identified with potential to be developed into a multi-sport field complex. The primary site for the recommendation is the Mahoney property due to its more central location to the Louisville metro area, which has capacity for up to 16 championship-grade flat fields. Additionally, there are two municipal sites with enough acreage to achieve up to 20 flat fields. Both municipal sites have been studied by sports feasibility firms and determined that they could be transitioned into a desirable multi-sport complex. Regardless of the current tourism and sports tournament environment both at the traveling level and local level, the focus now needs to be on assembling the needed acreage and gaining “approval” to move forward with a deal.

Louisville is uniquely positioned with all three sites to have such concentration of “available” land to develop within 20-30 minutes of downtown. Combined with the access to the surrounding population within 300 miles, Louisville is poised to grow into a hub for sports tournament business, if a multisport complex is developed. Adding to the unique features is the existing and developing sports-related assets. With the facilities at the University of Louisville and the reputation that the programs UofL has, the connection to a sports town is natural, as is the partnership that exists between the University, Louisville Tourism and the Louisville Sports Commission. Additionally, the Louisville Urban League is developing an Olympic-grade indoor track venue which will have the capacity for track meets as well as additional flexible uses. With that development in the west end of Louisville and the Louisville City Football Club Stadium completed on the east side in the Butchertown neighborhood, Louisville will be book-ended by sports facilities to the east and west. The University assets are concentrated just south of downtown. Consideration should be given to developing the multi-sport complex where the destination will benefit from the development and vice versa.



Milestone action steps

● 2021

Attractions	Events	Sports
<ul style="list-style-type: none"> Kick off meetings with individual assets on the Attractor Scale to review results and discuss future planning (plan to set goal for number of meetings on quarterly basis) Work with leadership on enhancements and developments that fit target markets 	<ul style="list-style-type: none"> Kick off meetings with event organizers studied in the Event Matrix to review results and discuss future planning (plan to set goal for number of meetings on quarterly basis) Work with leadership on enhancements and developments that fit target markets Identify opportunities for short-term COVID-19 event placements 	<ul style="list-style-type: none"> Confirm identified sports sites in consideration Meet with key sports developers and operators to confirm interest Meet with elected officials on sports sites on the short list for advocacy Identify funding options for sports field development (Public-Private Partnership for development, management and operation plus local option sales tax and district funding options)

● 2022

<ul style="list-style-type: none"> Identify strategic development opportunities for new product development 	<ul style="list-style-type: none"> Embed this tool into existing CIC program for funding/ sponsorship granting opportunities for events tied to criteria 	<ul style="list-style-type: none"> Confirm site and solidify deal for operational model
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● 2023

<ul style="list-style-type: none"> Work with local and state elected officials to identify public tax incentives for product development opportunities Work with leadership on enhancements and developments that fit target markets – ongoing effort for duration of DSP 		<ul style="list-style-type: none"> Break ground on multisport complex
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COVID-19 Implications

The implications of COVID-19 on travel continue to be significant, there is opportunity to tap into the drive-market for leisure travel, however depending on local restrictions attractions may take more time to have consistent indoor hours for visitors. This also affects events and sports as restrictions on gatherings continue. However, the focus of these priorities is not tied to the immediate term and discussions with event organizers, investors/developers, leadership at attractions and elected officials can begin during the COVID-19 recovery. Access to capital funds and public funds may not be as available in the short-term but federal and state incentives should be closely monitored as development may be subsidized to spur the economy in the next one to two years.



Diversity & Inclusion

This priority is more focused on the development of product; however, it is critical to ensure that representation and participation by diverse audience groups as to how product is developed is important. The participation from Louisville Tourism's Black Tourism Advisory Council will be critical. Additionally, Louisville Tourism has specifically been working on Black Heritage Leisure Tourism Initiatives that will be part of how products are developed and positioned going forward. In addition to the development of new product, there should also be a focus on preserving existing diverse product and telling the stories connected to the community's history.

Partners

As mentioned throughout this plan, the DSP is a destination-wide effort and the priority areas all have initiatives that require multiple partners to collaborate and work together in order implement and realize success. The product development priority will require partners from Louisville Tourism, Louisville Sports Commission, elected officials and the private sector. These partners will each have a role to play:

Partner	Role	Detail
Louisville Tourism	Facilitator, convener and data provider. Leading the working committees for attractions and events. Interface with leadership at attractions and event organizers	+ Manage engagement and keep tasks moving. Louisville Tourism will also be tasked with providing visitor data as needed and facilitating directly with leadership at attractions and event organizers to work through the respective criteria
Louisville Sports Commission	Lead for all sports actions on the multi-sport complex. Interface with Louisville Tourism to ensure alignment and partner on advocacy issues with elected officials	+ Project manage the multisport complex development recommendation to include identifying private sector partners and funding. Advocate for site with local officials
Attraction Partners (Includes leadership at local attractions, Arts and Cultural Alliance, Museum Row on Main, and Fund for the Arts)	Partner in implementation	+ Identify partner(s) in the private sector with interest and capacity to scale projects for implementation
Events Partners (Includes event organizers, City Office of Special Events and funding partners)	Partner in implementation	+ Identify partner(s) in the private sector with interest and capacity to scale projects for implementation
Sports Partners (Includes private operators and developers as funding partners)	Partner in implementation	+ Identify partner(s) in the private sector with interest and capacity to scale projects for implementation



Policies for Sustainable Tourism Growth

Research Based Strategic Direction

As a destination with strong momentum in the tourism and hospitality sectors, there will always be growing pains that can be hurdles to achieving success. During the DSP process with stakeholder feedback and research conducted in the market study phase, several areas of focus where policy-related items for improvement were surfaced. The policy-related areas that surfaced through the DSP process include: bourbon and the ability to ship outside of the state, hotel development and the public's ability to invest in convention hotels, air service development for leisure visitation growth, homelessness and panhandling and the effect on the visitor experience.

These areas of focus are tied to policy are not necessarily all negative aspects of Louisville, but without proactively addressing these policy related items the growth of Louisville as a destination and its overall economic impact may be stunted in the future. As Louisville looks to grow its entire economy, which has relied in part on visitation to grow its positive image, these priority areas of policy can be addressed to help spur the metro area's strategic growth and better compete with its comparable destinations with stronger overall economic balance as demonstrated through the benchmarking research.





Recommendation

Bourbon

The recommendation of the DSP is to continue to support the work of the KDA and be an advocate for lobbying the legislators to enable shipping outside the state. This is important to the bourbon distillers as visitors come and want to purchase and ship items home, similar to wineries and vintners in the famous wine region of Napa Valley. This ability to ship out of state will increase the spending of visitors and positively impact the visitor experience.

Additionally, it will be important to continue to work with the KDA as well as the individual stakeholders to follow and track the impact of larger government and federal regulations including tariffs and trade wars, etc. as the product of bourbon is restricted or overtaxed, which would negatively impact the actual product sales and therefore negatively impact the bourbon-driven economy in Louisville and the surrounding areas within the state. The industry will need to advocate with legislators and policy makers to ensure that bourbon at its core as a consumer product can sustain and maintain its growth.

Hotel Development

It is recommended that Metro Government, in conjunction with Louisville Tourism and the private sector, be proactive in putting a plan in place for a public-private partnership (P3) for a downtown full-service hotel. Stakeholder feedback as well as JLL's expertise in P3 hotel development projects has identified the current incentive structure is prohibitive for developers to be interested in Louisville for projects of significant scale (500-1,000 rooms) and instead are pursuing opportunities in competing destinations like Nashville, Austin and Charlotte.

As it currently stands, the public incentives for a hotel development are limited to a property less than 400 rooms and valued less than \$10,000,000 within a mile of the convention center area through March 2024. It is recommended that a P3 plan be developed to be put in place for a new hotel development to begin at the expiration of the current project protection in March 2024. The impact of COVID-19 on available capital for developers to make an investment in this timeframe will be limited and the P3 option will likely be the best option to see new hotel product developed to support growth in convention and leisure business.

Additionally, it is recommended that a similar process that was done for the KICC utilization and optimization study that is part supporting this hotel development priority, be conducted for the Kentucky Exposition Center (KEC). Based on the work completed in the DSP, it was identified that there is additional hotel needs associated with that site as well and strategic hotel development at the Kentucky Exposition Center would both improve product offering as well as lessen the pressure on downtown hotels when events take place at KEC.

Air Service Development

It is recommended that incentives be put in place to recruit carriers to the Muhammad Ali International Airport to increase service to the targeted leisure markets. The ability to develop air service to leisure feeder markets that have been identified in conjunction with the airport i.e. Fort Myers, FL should be pursued. Additionally, new air service to markets that have historically been drive markets, or are drive-able are ideal candidates for new air service especially with low cost carriers. The need for advocacy at the state level in conjunction with the airport leadership to incentivize all carriers will further the growth of domestic air bound leisure travel to Louisville. Incentives for any carrier willing to grow the market is an important aspect that many competitive destinations have already in place. These incentives help establish routes and grow the potential for inbound traffic and all added volume helps lower fares and pursue the next destination.

On the international side, access to international hubs is a critical next step in securing strong service to major hubs i.e. PHL, BOS, JFK, EWR, IAD, ORD, DTW. Making Louisville a one stop connection provides access to a significant portion of the traveling European populations. Additionally, a longer-term goal is to secure direct flights to major European hubs will make travel to Louisville more efficient and more effective. As the Bourbon brands look to grow their international market share, air service pursuits should follow their investments. Additionally, all the elements in the DSP are focused on the strategic growth of the tourism landscape, and this reinforces the need to consider product development which will continue to drive demand and make Louisville more attractive to airlines and their customers domestically and internationally. The connection to economic development as Louisville works to develop and enhance the product offerings will be important to entice airlines as well as future visitors.



Homelessness & Panhandling

It is recommended that a counsel on mitigating homelessness and panhandling be convened to address both the real issues affecting the downtown core as well as the perception of safety and security. It is recommended that this counsel consider investments in infrastructure such as lighting, repairing sidewalks and streetscapes to keep the downtown core clean, safe and well lit. Additionally, it is recommended that this counsel look to creative partnerships with human services and social services organizations for solutions to mitigate the risks locally to becoming homeless, which will require significant collaboration and consideration be given to this sensitive issue. This could also be a target of the Workforce Development priority to support those who may be homeless or reliant on panhandling due to economic circumstances. In other cases where the homeless issue is tied to mental health or drug abuse the partners who have expertise in health and recovery should take the lead.

The importance and severity of this issue is a growing concern nationally and was represented locally as something that has worsened and continues to negatively impact the local image. Visitors coming to Louisville for the exciting experiences it offers will want and need to feel safe. Additionally, there is increased attention on sustainable travel and the desire for an overall healthy community to surround the destination being important to travelers when they choose to visit a place. The health and vitality of the community at all levels will continue to be an important visitor trend in consideration and therefore requires focus from as aspects of Louisville economic development.

Milestone action steps

	Bourbon	Hotel Development
● 2021	<ul style="list-style-type: none"> • Continue meetings with KDA and others on the concerted areas of advocacy focus • Target new legislation to enable shipping • Track legislation to prevent tariffs on bourbon where possible 	<ul style="list-style-type: none"> • Kick off meetings with hotel working group with partners identified below • Identify needs for private developer to invest in full service hotel in downtown • Identify desired parcels • Initiate discussions with Metro Gov. for public support and consider pursuing a similar study for KEC
● 2022	<ul style="list-style-type: none"> • Continue working with KDA and individual stakeholders as needed to develop advocacy programs 	<ul style="list-style-type: none"> • Finalize criteria for private involvement
● 2023	–	<ul style="list-style-type: none"> • Identify private developers • Confirm public support with thresholds for investment • Confirm timeline to establish deal • Begin RFP development for P3 full-service hotel
● 2024	–	<ul style="list-style-type: none"> • Release RFP, select and award development
● 2025	–	<ul style="list-style-type: none"> • Finalize contract with private developer
● 2026	–	<ul style="list-style-type: none"> • Break ground on new full service downtown hotel

Air Service Development	Homelessness & Panhandling
<ul style="list-style-type: none"> • Work with airport leadership to identify target carriers • Meet with local and state legislators to understand restrictions and opportunities • Identify target audiences and project value to make case • Work to develop new legislation or proposed amendments to existing state policies to enable airline incentives 	<ul style="list-style-type: none"> • Develop counsel with partners identified below • Formulate action plan around reasons/ tiers of homelessness i.e. economic, mental health, drug abuse • Create tracks to address each tier through partner action • Advocate for infrastructure investments into public areas of downtown to increase safety and security measures
<ul style="list-style-type: none"> • Propose new policy and advocate for support 	<ul style="list-style-type: none"> • Begin to implement against each “track” to mitigate risk and contain the population’s growth
<ul style="list-style-type: none"> • Confirm new low cost carrier deals into Louisville market 	<ul style="list-style-type: none"> • Continue with implementation (assume 5-year position to continuously improve)
-	-
-	-
-	-



COVID-19 Implications

The economic effects of COVID-19 on the local and national economy have been severe and will continue to recover at a slower pace. However, this is the time to develop action plans around these policy related items to prepare the economy for the growth that is possible when the areas above are addressed. Specifically, the ability to make public investments in hotel product not only stimulate the local economy through infrastructure projects but also put local community members back to work. The time to build is during the slow down so that as the economy recovers and visitors begin to travel again, when the pent up demand is fully released, the destination will be able to ramp up and accommodate that demand to regain its steam to pre-pandemic levels.

Diversity & Inclusion

The priority around policy may not directly affect diverse community members across the community, however, Louisville Tourism is making direct policy changes and updates within the organization that will have a positive impact on inclusion. It is recommended that the topic of diversity and inclusion as it relates to policy be focused on the internal work Louisville Tourism is doing, which is detailed in the Louisville Tourism Organizational Recommendations section of this plan.



Partners

As mentioned throughout this plan, the DSP is a destination-wide effort and the priority areas all have initiatives that require multiple partners to collaborate and work together in order implement and realize success. The Policy priority will require partners from the Metro Government and Metro Council, Louisville Forward, Louisville Tourism, GLI, the Louisville Downtown Partnership, health and human services, social organizations and the private sector. These partners will each have a role to play:

Partner	Role	Detail
Louisville Tourism	Facilitator, convener and data provider. Interface with legislators as needed	+ Manage engagement and keep tasks moving. Louisville Tourism will also be tasked with providing visitor data and travel trends to support advocacy areas
Louisville Downtown Partnership	Data provider, homelessness program development support	+ Identify areas of focus as it relates to downtown planning
Louisville Metro Council & Government	Potential funder and advocates	+ Tap into the public sector funds to support hotel development and infrastructure projects. Advocate with local community partners and at the state level for funding
Louisville Forward	Economic and community development considerations, advocate and tax/grant fund identification	+ Support program development and identify areas of opportunity for grants and funding sources
Louisville Muhammad Ali International Airport	Lead on air service development focus	+ Work with identified carriers to site needs for deal structure and advocate on the state level for incentives
Greater Louisville Inc.	Program development support across air service, hotel and homelessness areas	+ Support program development and identify areas of opportunity for grants and funding sources and engage with stakeholder groups for support
Health, Human Services and Social organizations	Support program development and potential execution partners	+ Support program development and engage with stakeholder groups as well as target population for implementation
Private Sector	Funding and development partners	+ Identify partner(s) in the private sector with interest and capacity to develop hotel project

Louisville tourism organizational recommendations

Organizational Direction

In support of the overall Destination Strategic Plan, Louisville Tourism will need to plan for the future of the organization, adapt to the ever-changing travel and tourism industry and continue to be a leader in the community for the destination. In this process it became clear that as an organization, Louisville Tourism has, for all the right reasons, broadened its scope and focus as more than a destination marketing organization to being a management, product development and economic impact driving agency for the entirety of the destination. With this in mind it was recommended to develop new mission and vision statements. The recommended statements are as follows:

Vision

Louisville Tourism works to help build an inclusive world-class destination to visit, thereby inspiring investment that enhances the quality of life for all residents.

Mission

The mission of Louisville Tourism is to support the local economy's growth by driving tourism to the city and region. The agency serves as the leading voice for Louisville's hospitality industry to unite other sectors of the community, both private and public, in partnership to make the destination attractive to visitors and investment.

Both of these updated vision and mission statements speak to the role Louisville Tourism has and will play proactively in the future as the destination continues to evolve. These statements support the responsibility that Louisville Tourism will take on to implement aspects of the DSP as a lead agency in many cases as well as the partner and facilitator for other priority areas addresses above.



Recommendation

The recommendation of the DSP is for Louisville Tourism to take a lead role in implementing directly, or facilitating through partners, the priority areas of the Destination Strategic Plan. As an organization this will have several areas of focus: departmental functionality, resource allocation, overall future funding strategies and measurement and reporting.

Departmental Functionality

As stated in the priority areas Louisville Tourism is involved in each in varying capacities. Louisville Tourism will need to identify department heads and leadership staff to be assigned to each priority, some with more than one.

At the most basic level, Louisville Tourism is a convener and facilitator. This will require the respective departmental leader to organize, gather and facilitate the working group meetings in conjunction with overall Louisville Tourism leadership. This role will require Louisville Tourism to be the administrator and “backbone” of the DSP implementation.

In many of the priority areas, Louisville Tourism is also noted as a data provider. While Louisville Tourism may do some of this now, it will be imperative that the research and data platforms that the organization subscribes to be made available and shared across partners to inform future decision-making. The research department of Louisville Tourism will need to be set up and positioned for more partner access and data interpretation and distribution. It will be important that data is interpreted before being distributed as many partners involved in the DSP are non-traditional tourism partners i.e. arts organizations, workforce organizations, developers, government and economic development. These partners will rely on Louisville Tourism to interpret data for their use whether that be in lobbying local or state officials or working with local stakeholders. For example, the Arrivalist platform, which tracks cell phone data for visitors, will be instrumental in indicating the trends in bourbon-driven travel which is critically important to the distillery partners, Metro Government and the airport

in soliciting and making the case for new air service and related incentives. Sharing this kind of data to be used and leveraged for policy and investment decisions will be critical.

Additionally, Louisville Tourism is a lead organization in several areas of the DSP. Being the lead will put more responsibility on the organization's leadership as well as the departments tasked with running point for implementation of a particular priority area. This will require the departments to form working groups with recommended stakeholders as their liaisons to the industry. As a starting point, it is recommended that members of the DSP Leadership Committee be the stakeholder lead for the working groups. If not a Leadership Committee member, a stakeholder partner who has been involved in the formation of the priority will be critical, i.e. Commission on Public Art connected to the Neighborhood Preservation & Development priority. For each priority area where Louisville Tourism is the lead organization the following is recommended:

Product Development – Assets & Attractions

Louisville Tourism Lead – VP of Tourism Development & Senior VP of Convention Development
Working Group Partner(s) – Louisville Slugger Museum & Factory

Product Development – Events

Louisville Tourism Lead – VP of Destination Services & Senior VP of Convention Development
Working Group Partner(s) – Danny Wimmer Presents, KY Derby Festival

Product Development – Sports

Louisville Tourism Lead – VP of Destination Services & Senior VP of Convention Development
Working Group Partner(s) – Louisville Sports Commission

Neighborhood Preservation & Development

Louisville Tourism Lead – VP of Tourism Development
Working Group Partner(s) – Commission on Public Art

Bourbon Connection

Louisville Tourism Lead – VP of Tourism Development and VP of Marketing Communications
Working Group Partner(s) – Greater Louisville Inc., Louisville Forward, Bourbon District (Louisville Downtown Partnership), Frazier History Museum, Kentucky Distillers Association

Policies for Sustainable Tourism Growth – Hotel Development

Louisville Tourism Lead – Senior VP of Convention Development
Working Group Partner(s) – private developer community

Policies for Sustainable Tourism Growth – Air Service Development

Louisville Tourism Lead – Senior VP of Convention Development & VP of Tourism Development
Working Group Partner(s) – Louisville Muhammad Ali International Airport

Policies for Sustainable Tourism Growth – Bourbon

Louisville Tourism Lead - VP of Tourism Development
Working Group Partner(s) – Kentucky Distillers Association

Policies for Sustainable Tourism Growth – Homelessness & Panhandling

Louisville Tourism Lead – Senior VP of Convention Development & VP of Tourism Development
Working Group Partner(s) – Louisville Downtown Partnership

There should be working groups for all of the priority areas of the DSP, however those mentioned above are priorities where Louisville Tourism will play a lead role and therefore need to tactically address those partners in order to initiate and follow through on implementation. This will mean added responsibility for the department head as well as its support staff to coordinate and lead these efforts. Additionally, the need for support through Louisville Tourism’s departmental leaders may necessitate additional departmental participation to support implementation. For example, the priority areas addressed above are tied primarily to the Tourism Development department, and while that is the right fit today, it is recommended that Louisville Tourism consider shifting focus from within the Partnership department to support areas of implementation like Neighborhood Preservation & Development. As these neighborhoods and the stakeholders within them will ultimately be “partners” and is an extension of a community relations effort, Partnership could play a larger role in supporting the neighborhood’s needs and support the VP of Tourism Development in working through the Neighborhood Preservation & Development priority. All efforts will be supported and overseen by Louisville Tourism’s leadership.

Resource Allocation

As stated previously, the DSP is much broader to include all aspects of the destination's landscape and therefore expands Louisville Tourism's role beyond sales and marketing. This aligns with the newly recommended mission and vision for the organization. With this in mind, Louisville's budget as well as staff will need to be reallocated to support the initiatives of the DSP. Broadly speaking, Louisville Tourism's budget has previously been allocated with 55% sales and marketing, 4% general and administrative and 2% occupancy (building expenses). It is recommended that at least 5% of the resource going forward be allocated to supporting the DSP initiatives with 50% of that specifically tied to product development.

Although Louisville Tourism, like many destination marketing organizations across the country, has had budget challenges because of COVID-19's impact on travel in this year, this is the time to make resource shifts to focus on the future. Resource may not always mean budget dollars, but could also mean human resource to support the initiatives. It is recommended that Louisville Tourism consider bringing on a project manager (contract or staff) specific to the DSP to support overall implementation, including areas where Louisville Tourism is not the lead organization.

Overall Funding Strategies

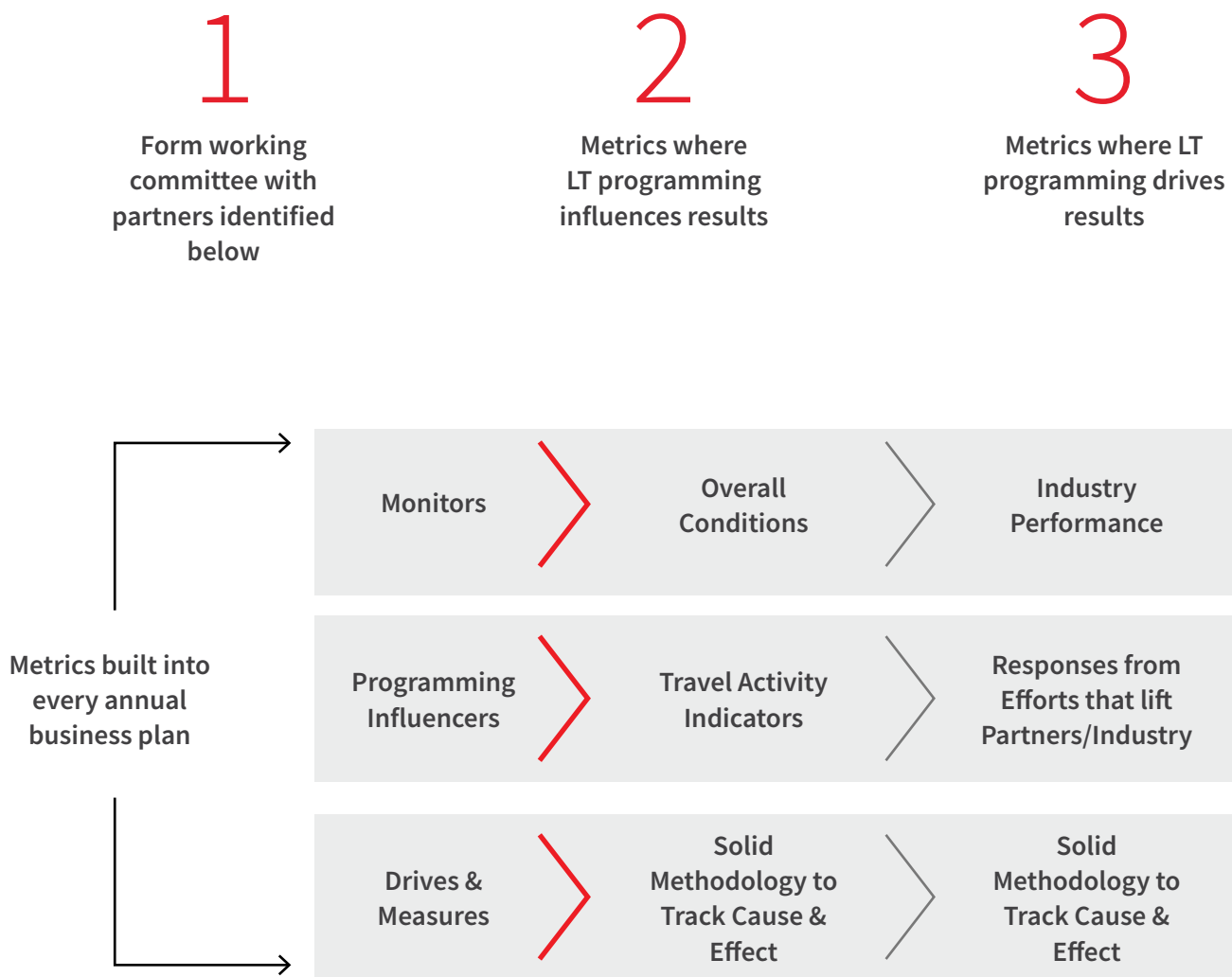
With all the challenges the industry has faced in 2020 amid a global pandemic halting travel and tourism, budget and funding considerations are critically important to build a sustainable future. As laid out in the DSP, there are many new initiatives over a five+ year period and these initiatives will require support whether directly from Louisville Tourism from a funding standpoint or indirectly through staff and existing resources. Besides the work tied to the DSP, there is also the existing work that Louisville Tourism executes on i.e. sales for KICC, leisure marketing, event and visitor services, etc. that need to be sustained for the future. To add to Louisville Tourism's scope will require added funding.

It is recommended that Louisville Tourism, in partnership with the destination, pursue new avenues of funding to support this critical work.



Measurement & Reporting

In addition to how Louisville Tourism will need to position its departments, allocate resources and plan for future funding, success for the organization against the DSP will be tied to how measurement and reporting is done for stakeholders. The industry typically reports out on macro-economic figures of total visitors and total impact. While that information is valuable measuring the success of the DSP will need to be tied more closely to actions taken as a result of Louisville Tourism's activity as a lead and as a partner in implementation. It is recommended that Louisville Tourism break measurement and reporting out into three areas for the local industry:



Across the organization, reporting should be classified into these three areas where Louisville Tourism is monitoring industry performance, tracking where programming has influence and measuring how and what the programming drives as a direct result of LT's work.

Samples of these metrics in each category are below:

Monitor

- Visitation Stats – frequency annual
- Visitor Impact – frequency annual
- Tax Collection/Revenue – frequency annual
- Lodging Performance – frequency monthly

Program & Influence

- Web activity
- Social media engagement
- Travel media coverage
- Point of origin awareness

Drives

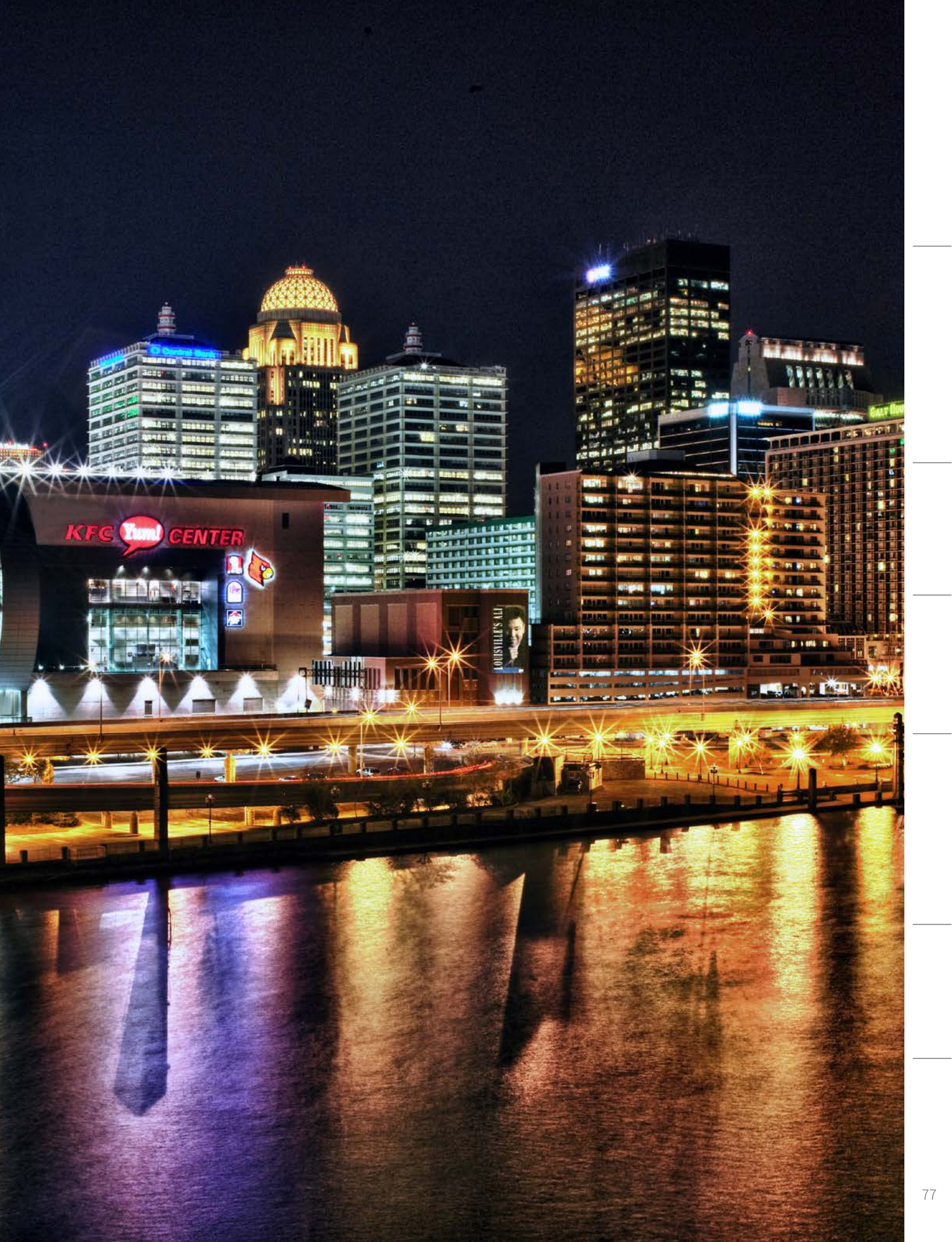
- Research-driven visitor conversion rates
 - Room nights associated
- Sales conversion rates
 - Room nights associated
- Referrals to partners
- Transaction trends for partner programs
- Campaign results in conversion

DSP Specific Reporting

- Industry Jobs Created & Filled
- Policy & Advocacy results
- Diversity & Inclusion audit and action results
- Event organizers supported and associated trends with respective events
- Products supported/invested in
- Assets worked with
- Partners engaged
- New Programs and Recommendations Fulfilled (or status of)

Reporting on success in a way that shows Louisville Tourism's actions have direct result as well as being the sought-out resource for industry level data on how the market is performing and Louisville Tourism's association with that performance will be a new shift on reporting. These tiers of reporting on metrics will be easier to digest for stakeholders as well as cleaner for the organization to message out its new expanded role in the community related to the implementation of the DSP.





Conclusion

Louisville Metro is uniquely positioned to achieve the ambitions of the tourism and hospitality industry over the next 10 years. The combination of the existing iconic attractors and rich culture and history of bourbon have created a strong foundation for the industry's growth. The roadmap that this DSP lays out will further the connection with existing assets and provide an avenue for new strategic investments and developments.

Undergoing a comprehensive Destination Strategic Planning effort for the entirety of Louisville as visitor destination is a complex and challenging process. The engagement in the planning process by all of the partners who have stepped up to be involved over the last year prove that the community is ready and willing to take on the implementation of the Destination Strategic Plan.

The community leaders that have come together to drive the destination forward through a global pandemic that halted this industry for months and through social issues that put a spotlight on Louisville further reinforced that planning for the future was going to be important in the present to lead the economic and community recovery. With this commitment to the process, the focus now shifts to implement the recommendations of the DSP.

With Louisville Tourism at the helm of this Plan as a leader, convener and facilitator along with the many partners named throughout the priorities, Louisville is primed for success going forward.



Appendix

Special thanks to the entire Louisville Tourism team and the stakeholders and partners across the community who participated in the Destination 2030 plan.

Leadership Committee members

Donald Lassere	Muhammad Ali Center
Sarah Robbins	21c Museum Hotels
Pat Armstrong	Kentucky Derby Museum
Anne Jewell	Louisville Slugger Museum
Dan Mann	Louisville Regional Airport Authority
Larry Bell	Hyatt Regency Hotel
Jeff Thompson	Musselman Hotels
Scott Stuckey	The Omni Hotel
Rebecca Matheny	Louisville Downtown Partnership
Cynthia Knappek	Leadership Louisville Center
Mary Ellen Wiederwohl	Louisville Forward
Bill Dieruf	Jeffersontown City Hall
Stacy Roof	Kentucky Restaurant Association
Kim Baker	Kentucky Center for the Performing Arts
Teddy Abrams	The Louisville Orchestra
Christen Boone	Funds for the Arts
Vince Tyra	University of Louisville
Karl Schmitt	Louisville Sports Commission
Adam Johnson	Kentucky Bourbon Trail Experiences
Carolyn Tandy	Texas Roadhouse
Ferdinand Risco	TARC
Aukram Burton	Kentucky Center for the African American Heritage
Matt Gibson	Kentucky Derby Festival
Cleo Battle	Louisville Tourism
Karen Williams	Louisville Tourism

Greg Fischer	Office of the Mayor
Ellen Heslen	Office of the Mayor
Michael Grisanti	Louisville Tourism Commission
Mary Moseley	Louisville Tourism Commission
David Greene	Louisville Tourism Commission
Chris Poynter	Louisville Tourism Commission
Jessica Green	Louisville Metro Council
Barbara Shanklin	Louisville Metro Council
Keisha Dorsey	Louisville Metro Council
Barbara Smith	Louisville Metro Council
Donna Purvis	Louisville Metro Council
David James	Louisville Metro Council
Paula McCraney	Louisville Metro Council
Brandon Coan	Louisville Metro Council
Bill Hollander	Louisville Metro Council
Pat Mulvihill	Louisville Metro Council
Kevin Kramer	Louisville Metro Council
Rick Blackwell	Louisville Metro Council
Mark Fox	Louisville Metro Council
Cindi Fowler	Louisville Metro Council
Kevin Triplett	Louisville Metro Council
Scott Reed	Louisville Metro Council
Markus Winkler	Louisville Metro Council
Marilyn Parker	Louisville Metro Council
Anthony Piagentini	Louisville Metro Council
Stuart Benson	Louisville Metro Council
Nicole George	Louisville Metro Council
Robin Engel	Louisville Metro Council
James Peden	Louisville Metro Council
Madonna Flood	Louisville Metro Council
David Yates	Louisville Metro Council
Brent Ackerson	Louisville Metro Council



Kent Oyler	Greater Louisville Inc.
Sarah Davsher-Wisdom	Greater Louisville Inc.
Deana Epperly-Karem	Greater Louisville Inc.
Rebecca Fleischaker	Louisville Forward
Holly Prather	Leadership Louisville
Lisa Zangari	Leadership Louisville
Aaron Miller	Leadership Louisville
Jeanine Duncliffe	Globalization
Mike King	Metro Transportation Advanced Planning
Darrel Watson	Louisville Intl. Airport
Tom Hall	State DOT representative
James Graham	Louisville Metro Division of Transportation
Andrew Carter	21C Museum Hotel
Mike Reidy	AC Marriott
Mark Billing	Aloft
Brad Walker	Brown Hotel
Andre Donley	Courtyard by Marriott Downtown
Dan McCarragher	Embassy Suites
Stanislav Iliev	Fairfield Inn Downtown
Patrick Gregory	Galt House Hotel & Suites
Mindy Wilson	Hampton Inn Downtown
John Fields	Hilton Garden Inn Downtown
Russell Toebbe	Holiday Inn Express Downtown
Penny Lenz	Home2Suites by Hilton Louisville Downtown Nulu
John Demling	Homewood Suites
Mark Billing	Hotel Distil
Larry Bell	Hyatt Regency Hotel
David Greene	Louisville Marriott Downtown
Mark Billing	Moxy Louisville
Jenna Teague	Residence Inn Downtown
Verl Wilder	Seelbach Hilton Hotel
Stanislav Iliev	Springhill Suites Downtown
Caesar Lancetta	Best Western Premier Airport Expo
John Noblett	Courtyard by Marriott Airport
Jose Rolan	Crowne Plaza Airport
Dan Thompson	Hilton Garden Inn Airport
James Bailey	Holiday Inn Airport Expo Center
Mary Pat Harman	Residence Inn Airport
Mark Kuiper	Springhill Suites by Marriott Airport
Marty Allen	Tru by Hilton Airport
Leslie Schaffer	aLoft Louisville East
Larry Carrico	Courtyard by Marriott East
Gary Burdette	Embassy Suites Hotel
Meagan Baker	Hilton Garden Inn East
Josh Matthews	Hilton Garden Inn Mall St. Matthews
Jeff Parrish	Marriott Louisville East
Lana Ulmer	Residence Inn Oxmoor
Sarah Betran	Residence Inn Louisville Northeast

Tristian Davis	Springhill Suites by Marriott
Lacy Crawford	Tru by Hilton Louisville East
Sushi Nasta	Hawthorn Suites Louisville North
Thomas Fanning	Horseshoe Casino
Charles Blair	Radisson Louisville North
Michael Klus	Sheraton Louisville Riverside
Gill Holland	The Group Entertainment
Amy Foster Parish	KMAC Museum
Kathy Welch	Craft(s) Gallery & Mercantile
Suzi Tipton	Stoneware & Co.
Jack Mathis	Work The Metal
Leslie Bowers	Peace of the Earth
Jenny Pfanenstiel	Formé Millinery
Leanne Doll	Bourbon Barrel Foods Retail Store
Jenny Clements	Fourth Street Live!
Kelly Brown	Westport Village
Marilyn O. Patterson	Norton Commons
Steve Poe	Poe Companies
Adam Skiles	Trolley De'Ville
Joey Myers	Trolley De'Ville
Bill Stenzhorn	Fourth Street Live!
Krista Snider	Belle of Louisville
Kate Meador	Conrad Caldwell House & Museum
Andy Treinen	Frazier History Museum
Shawn Williams	Historic Old Louisville Walking Tours
Carol Gorves	Indiana Caverns
Pat Armstrong	Kentucky Derby Museum
Jo Haas	Kentucky Science Center
Vic Gregovits	Louisville Bats
Leslie Goldbach	Louisville Segway/Louisville Glided Tours
Anne Jewell	Louisville Slugger Museum & Factory
John Walczak	Louisville Zoo
Sean Higgins	Mint Julep Experiences
Stephen Reily	Speed Art Museum
Steve Smith	Stoneware & Co.
Karen Gillenwater	21c Museum Hotels
Michael Motamedi	Rabit Hole Distillery
Dee Ford	Angel's Envy
Joe Heron	Copper & Kings American Brandy Co. Distillery
Jeff Crowe	Evan Williams Bourbon Experience
Kevin Smith	Jim Beam Urban Stillhouse
Corky Taylor	Kentucky Peerless Distilling Company
Joyce Taylor	Jeptha Creed
Colleen Thomas	Kentucky Distillers' Association
Mary Gratzner	Kentucky Distillers' Association
Campbell Brown	Brown-Forman
Robert Curran	Louisville Ballet
Matt Wallace	KY Shakespeare Festival
Robert Massey	Louisville Orchestra
Cindy Knopp	Derby Dinner Playhouse
David Bartlett	Louisville Palace
John Grantz	Headliners Music Hall

Allison Huff	Walden Theatre
Aukram Burton	Kentucky Center for African American Heritage
Dale Josey	Blackacre Conservancy
Christen Boone	Fund for the Arts
Carol Ely	Historic Locust Grove
Robert Fleming	Actors Theatre
Lee Burchfield	Louisville Public Library
Lindy Casebier	Louisville Visual Arts Association
Michael Hudson	American Printing House for the Blind
Patti Linn	Farnsley Moremen Landing
Terri Foster	Louisville Youth Choir
Moirra Scott Payne	Spalding University
Suzanne Wright	JCPS
Michelle Staggs	KMAC Museum
Aldy Miliken	KMAC Museum
Barbara Jamison	Kentucky Opera
Sarah Lindgren	Commission on Public Art
Elmer Lucille Allen	Commission on Public Art
Andrew Cozzens	Commission on Public Art
Nicole George	Commission on Public Art
Vallorie Henderson	Commission on Public Art
Jessica Bennett Kincaid	Commission on Public Art
Gretchen Milliken	Commission on Public Art
Christopher Reitz	Commission on Public Art
Cathy Shannon	Commission on Public Art
Anna Tatman	Commission on Public Art
David Beck	Kentucky Venues
Kevin Moore	Kentucky Exposition Center
Dave Patrone	KEC & KICC
Blake Henry	Kentucky International Convention Center
Toby Young	Mid-America Trucking Show
Warren Sellers	Show Director
Matt Moss	Levy Restaurants
Shane Fisher	Prestige AV & Creative Services
Steve Larsen	Fern Exposition & Event Services
Karl Schmitt	Louisville Sports Commission
Greg Fante	Louisville Sports Commission
Eric Granger	KFC Yum Center
Robbie Valentine	KFC Yum Center
Brad Estes	Louisville FC
Steve Bailey	Junior Volleyball Association
Tucker Neal	TFN Camps & Clinics
Dana Kasler	Louisville Metro Parks
Tom Davidson	Pastime Tournaments
Chuck Hodge	USA Cycling
Christine Simmons	USA Fencing
Dana Kasler	Metro Parks
Deborah Bilitski	Waterfront Development Corporation
Sam Stewart	21st Century Parks
Kasey Maier	Waterfront Botanical Gardens

Danny Hayes	Danny Wimmer Presents
Mike Slaton	Louisville Pride
Christy Lee Brown	Philanthropist
Sandra Frazier	Tandem Public Relations
Sadiqa Reynolds	Louisville Urban League
Keith Talley	Air Pollution Control District
Marilyn Harris	Housing and Community Development
Sarah Moyer	Public Health and Wellness
Lisa Benson	Business First
Richard Green	Courier-Journal
Nicole White	Lane Report
Laura Snyder	LEO Weekly
Stephen George	Louisville Public Media
Josh Edwards	News Radio 840 WHAS
Janice Levitch	The Voice-Tribune
Cathy Zion	Today's Woman
Ken Selvaggi	WAVE3
Dale Woods	WDRB
Christy Moreno	WHAS11
Glenn Haygood	WLKY
Josh Heird	University of Louisville Athletics Dept., SAC Bldg.
Matthew Bevin	Kentucky State Fair Board
Mark Lynn	Kentucky State Fair Board
Don Parkinson	Kentucky State Fair Board
Ryan Quarles	Kentucky State Fair Board
Nancy Cox	Kentucky State Fair Board
Edward Bennett	Kentucky State Fair Board
Ryan Bivens	Kentucky State Fair Board
Marshall Coyle	Kentucky State Fair Board
Sharon Furches	Kentucky State Fair Board
Joseph Goggin	Kentucky State Fair Board
Michael Grisanti	Kentucky State Fair Board
Philip McCoun	Kentucky State Fair Board
Tandy Patrick	Kentucky State Fair Board
Michael Poynter	Kentucky State Fair Board
H Wallace	Kentucky State Fair Board
David Williams	Kentucky State Fair Board
William Landrum	Kentucky State Fair Board
Gloria Bolin	Kentucky State Fair Board
Haley Nelson	Kentucky State Fair Board

Thank you

Attractor Scale

Process - Multi-step assessment of destination assets

1

Utilize visitor traffic and flow data to assess current demand

2

Place individual assets on scale based on eight criteria to score

3

Rate anything that is a 6-7 or greater as Louisville's *Attractors*

4

Utilize the outcome to identify future competitive position

5

Recommend new investment or enhancement to grow assets on the scale

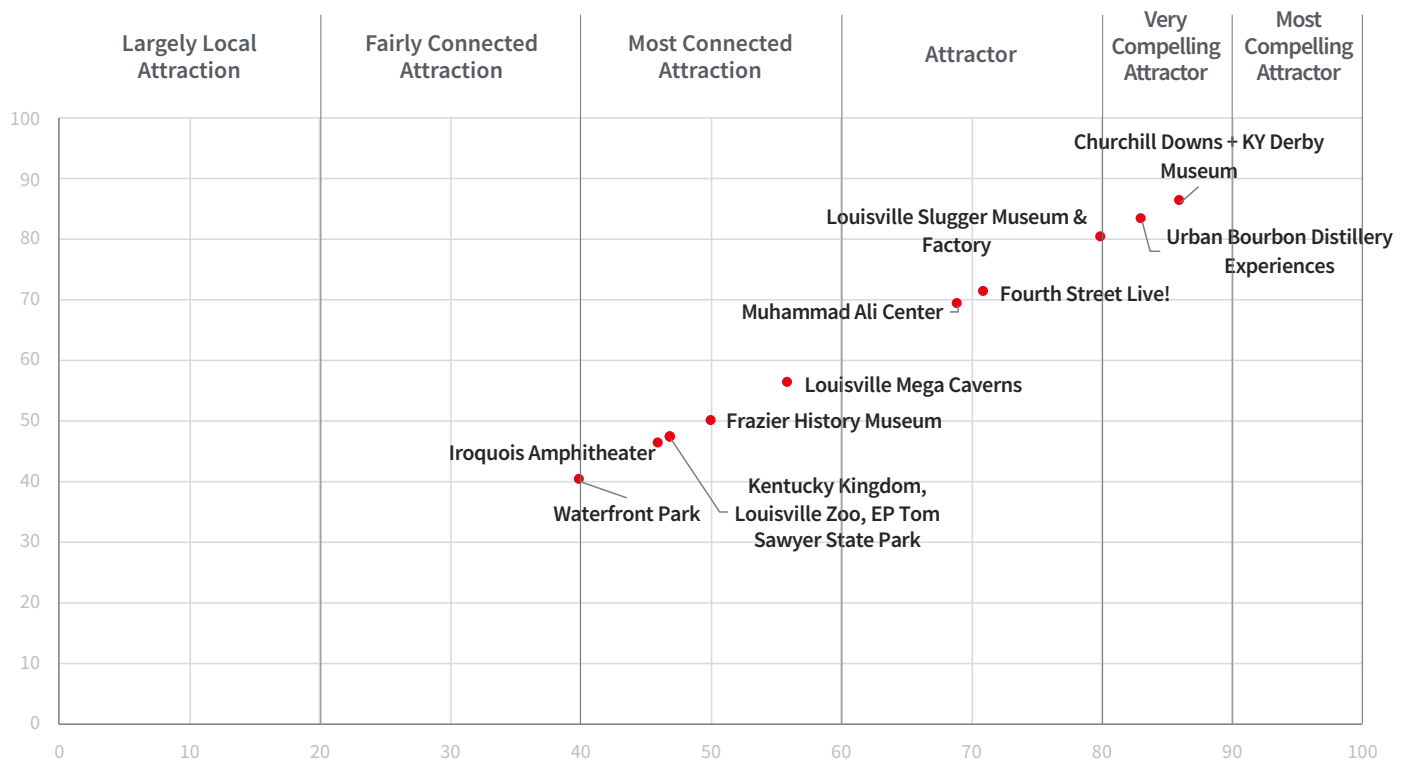
Attractor Scale Elements

Item	Definition	Max Point Value
One of a Kind	Captivating content or collections that drives interest and appeal. Proximity of alternative similar offerings can be a factor in overall uniqueness	25
Iconic Scale	Dramatic visual prompting a curiosity powerful enough to inspire a visit (Instagram worthy- trying to capture a moment)	20
Engaging Visitor Experience	Interaction between the guest and the attraction	15
Current Visitor Demand	Level of visitor traffic, reviews, etc. to the asset currently	15
Event Opportunities	Programming temporal, catalytic events	10
Venue Capabilities	Easily transformed and adapted to host various functions	5
Identified Target Audience(s)	Multiple target audience and visitor types can be targeted based on overall connectivity	5
Future Unique Development	Upcoming additions or plan initiatives that elevate potential	5

Attractor Scale: Sample Elements

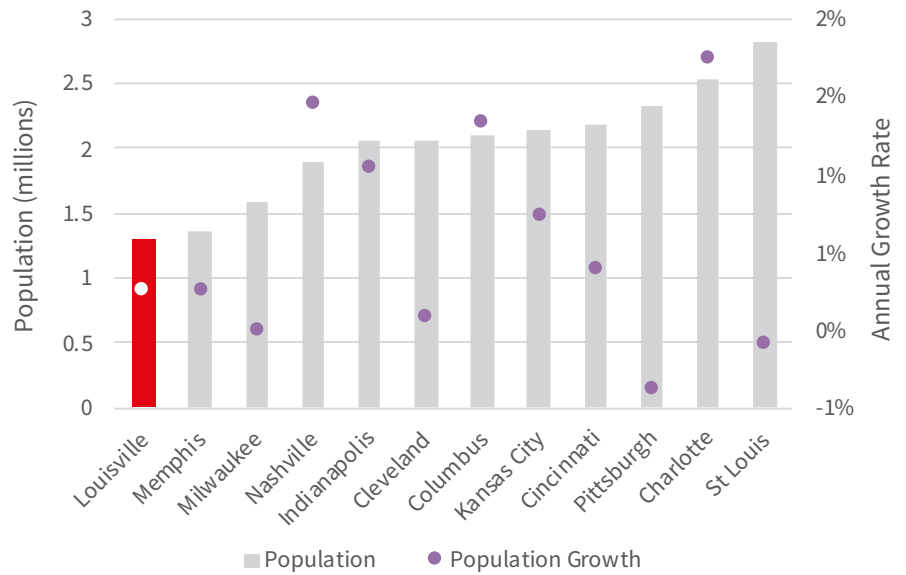
Item	Definition	Example	Max Point Value	Max Point Value
One of a Kind	Captivating content or collections that drives interest and appeal. Proximity of alternative similar offerings can be a factor in overall uniqueness	Louvre Museum	25	25
Iconic Scale	Dramatic visual prompting a curiosity powerful enough to inspire a visit (Instagram worthy- trying to capture a moment)	Eiffel Tower	20	20
Engaging Visitor Experience	Interaction between the guest and the attraction	Red Rocks Amphitheatre	15	15
Current Visitor Demand	Level of visitor traffic, reviews, etc. to the asset currently	Central Park	15	15
Event Opportunities	Programming temporal, catalytic events	Philadelphia Art Museum	10	10
Venue Capabilities	Easily transformed and adapted to host various functions	LA Live	5	5
Identified Target Audience(s)	Multiple target audience and visitor types can be targeted based on overall connectivity	Rock and Roll HOF	5	5
Future Unique Development	Upcoming additions or plan initiatives that elevate potential	Disney Parks	5	5

Attractor Scale: Combined Look



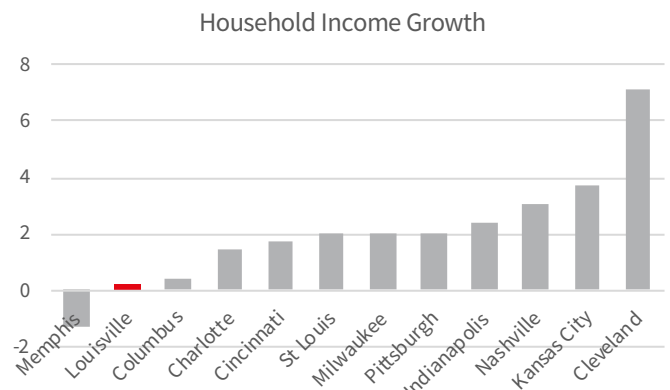
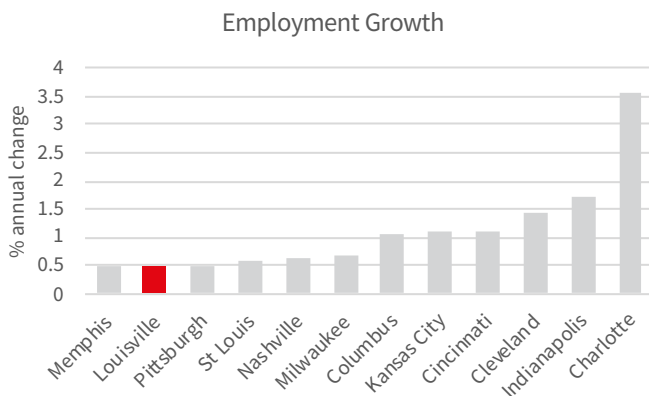
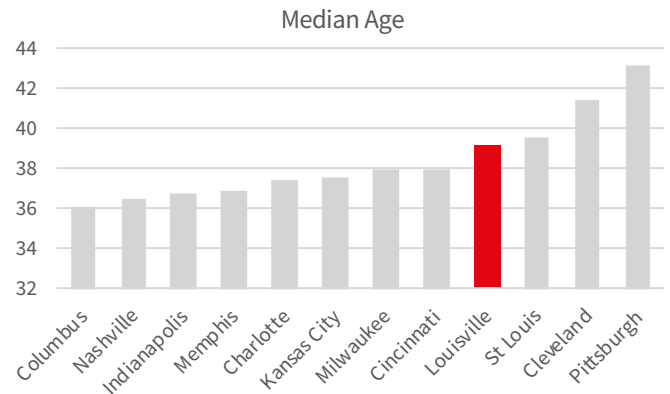
Population

- Louisville has the smallest population of the comp set
- Louisville is in the lower third in terms of annual population growth to read Louisville is in the lower third in terms of annual population growth



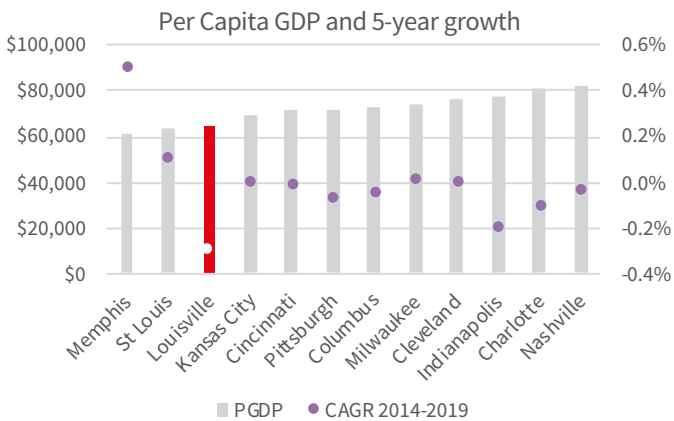
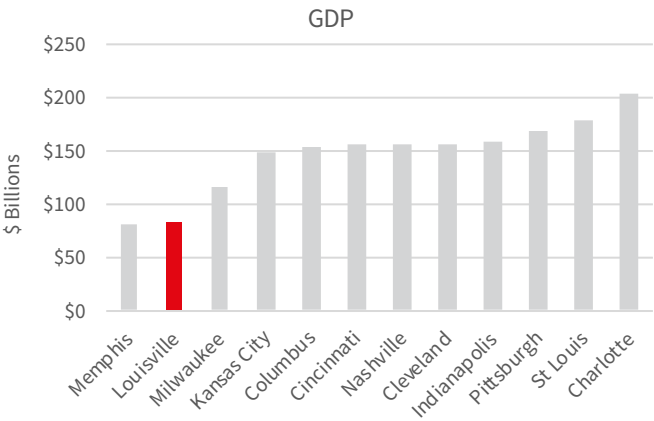
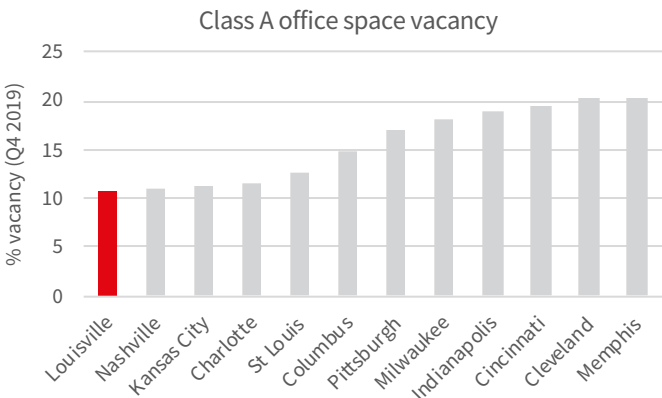
Demographics

- Louisville is among the older of the MSAs
- Louisville has experienced lower employment and household income growth



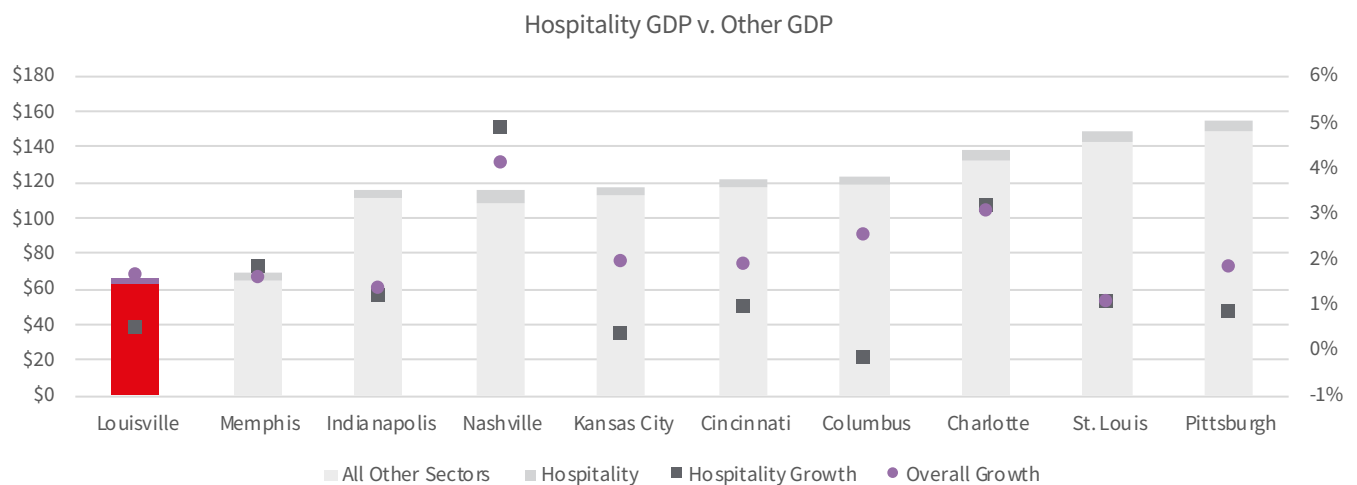
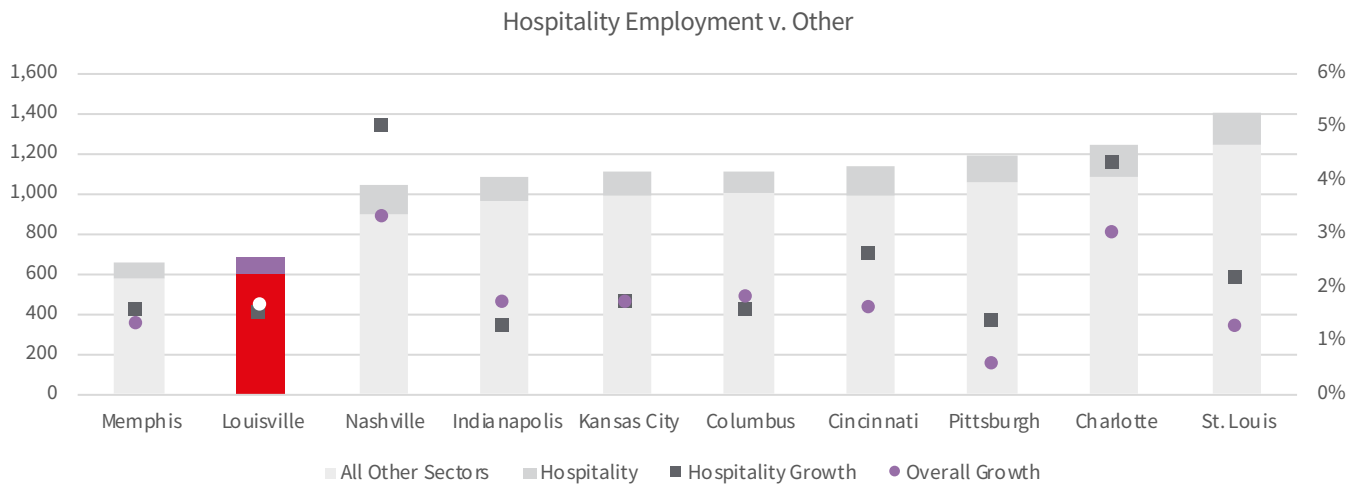
Economic Activity

- Louisville has the lowest Class A office space vacancy of the comp set
- Louisville is among the lesser producing MSAs, with the second lowest GDP
- Louisville has the third lowest GDP per capita and is the slowest growing of the MSAs.



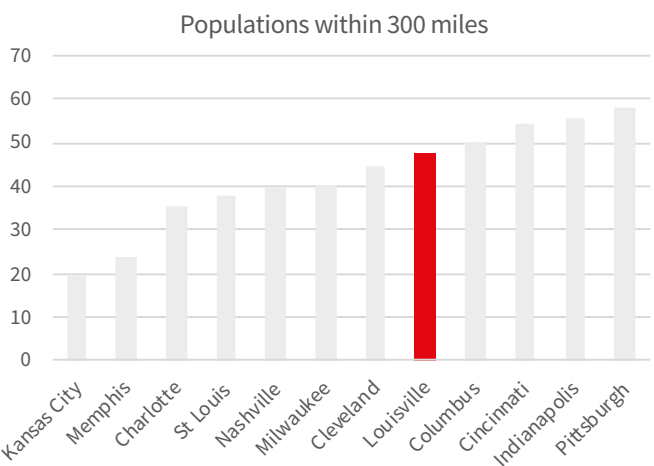
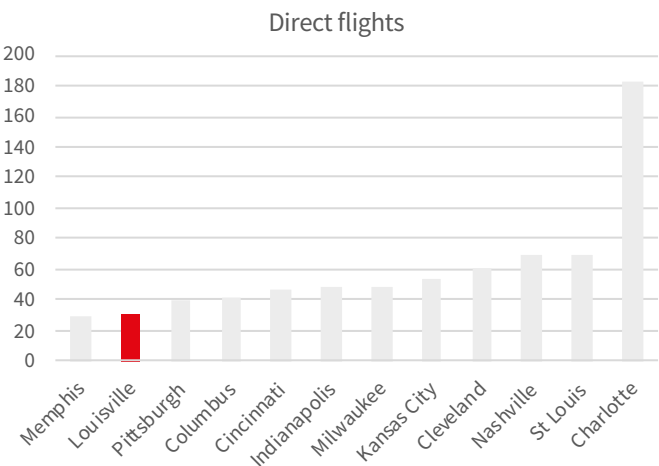
Hospitality Industry Compared to Total

- Louisville has the second smallest total employment of the comp set.
 - The share of Louisville's hospitality employment is 12.4%, placing it in the middle of the comp set (average is 12.8%).
 - **Louisville's Hospitality sector is employing people at the rate of larger scale economies**
 - The growth of Louisville's hospitality employment tracks closely with overall employment growth.
- Louisville has the smallest total GDP of the comp set.
 - The share of Louisville's GDP produced by the hospitality sector is 4.1%, the fourth smallest of the comp set.
 - Equal to Indianapolis, Cincinnati and above KC, Columbus and Pittsburgh
 - The growth in Louisville's hospitality output is lower than overall GDP growth



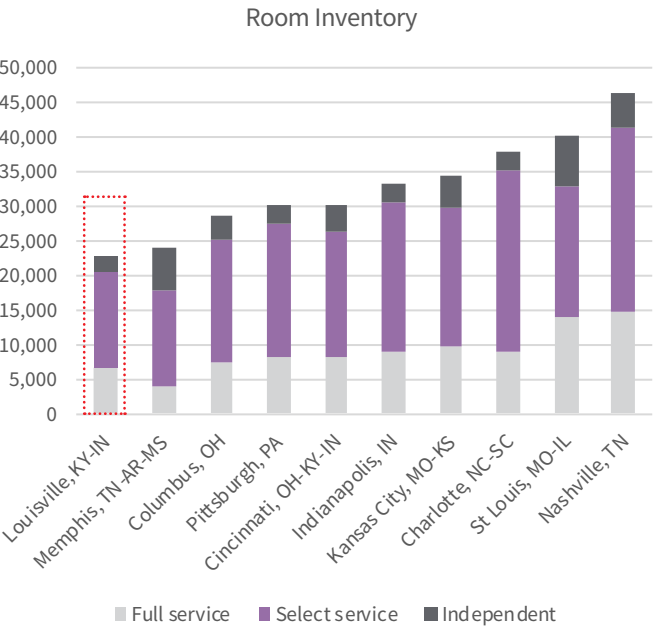
Connectivity

- Louisville has fewer direct flights out of its main airport than the comp set
- Louisville is closer to the median in terms of population within a 300 mile (driving) radius



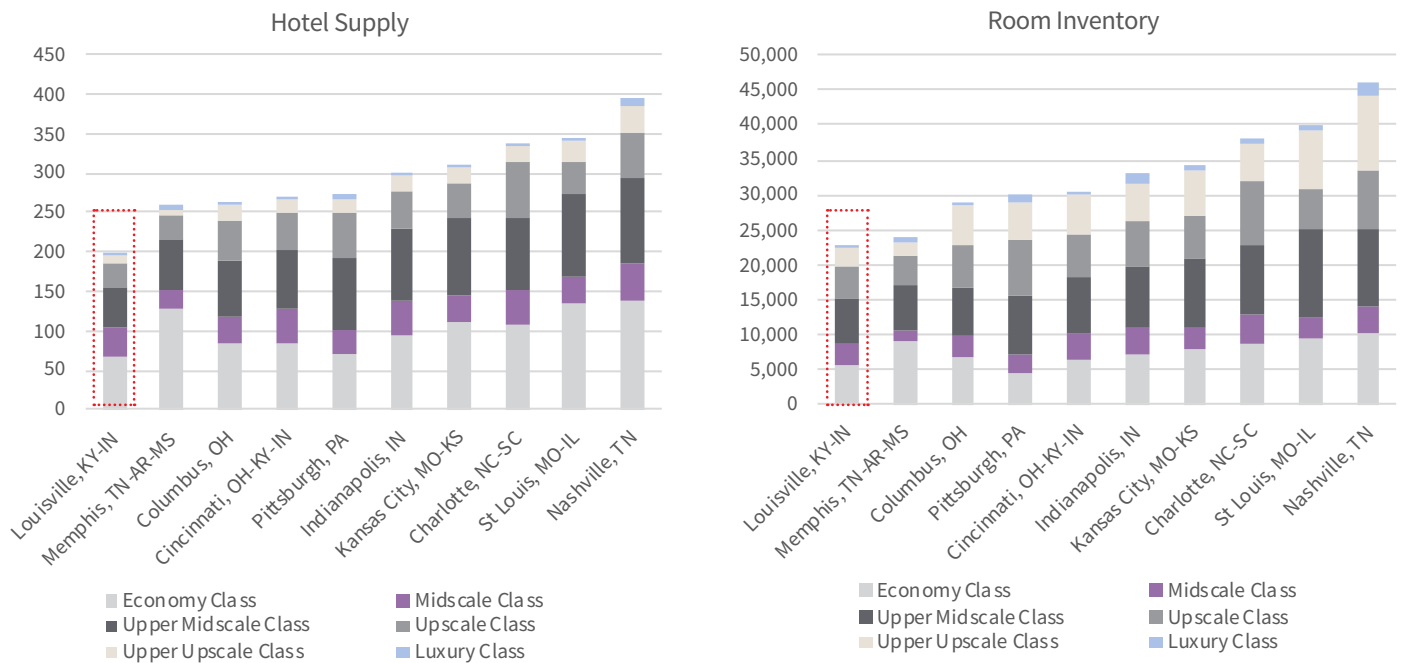
Inventory

- Louisville has the smallest supply of its competitive set



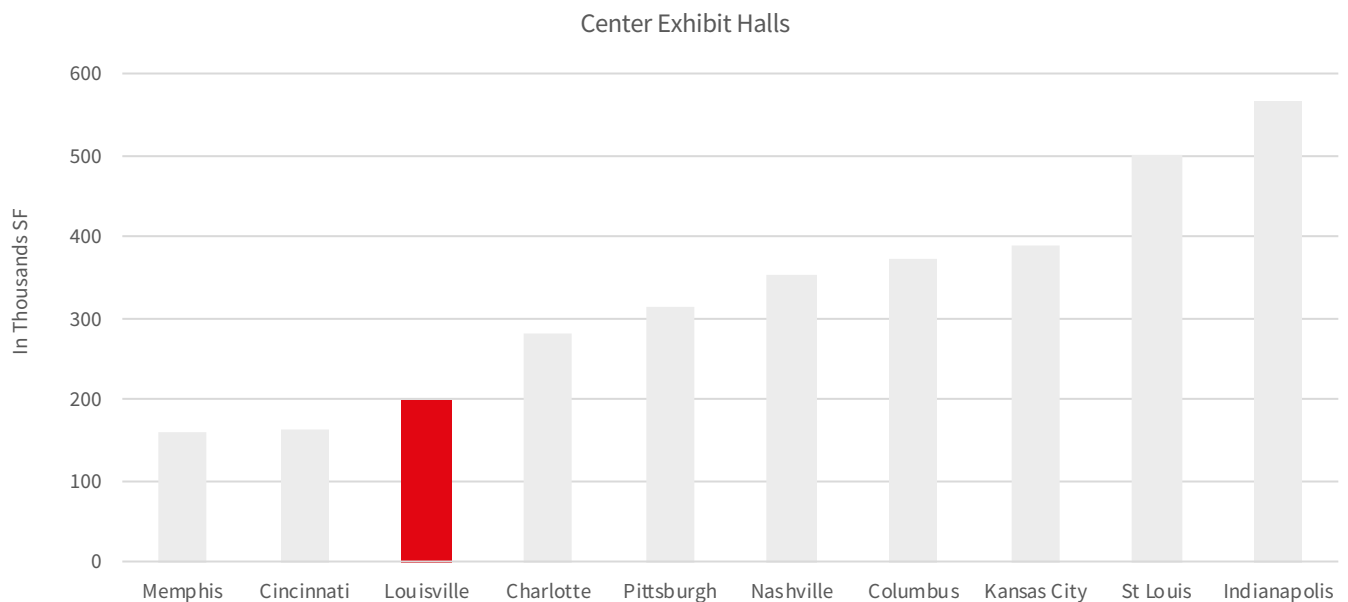
Inventory – By Class

- Louisville has the smallest supply of its competitive set



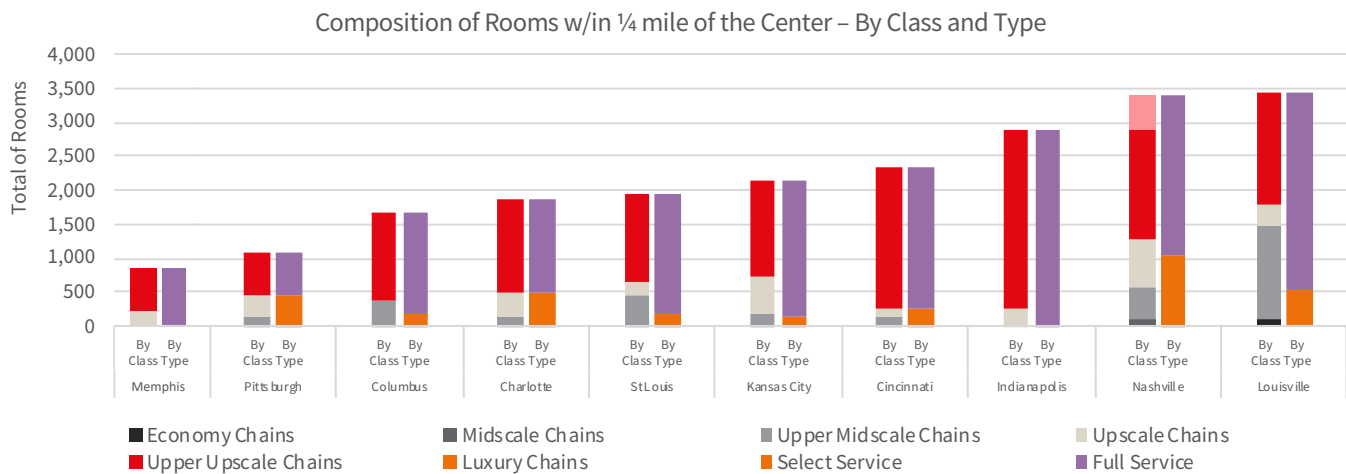
Convention Center Exhibit Halls

- With 200,000+ square feet of contiguous exhibit space, KICC is the third smallest exhibit hall in its comp set.



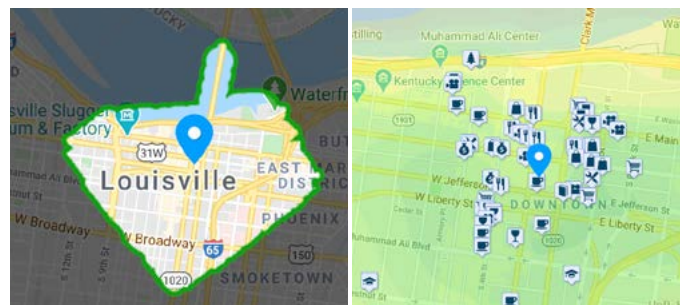
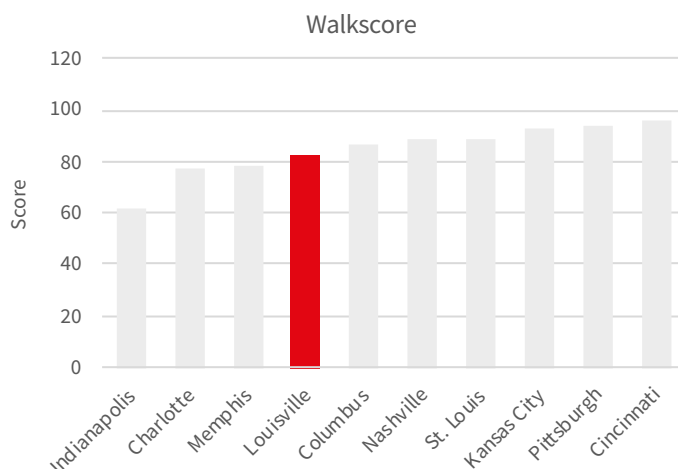
Convention Center District Product Comparisons

- The KICC has among the largest room supply among the convention comp set within ¼ mile of the center.
- 97 of the rooms are economy class; 1,379 are Upper mid-scale; 315 are Upscale; and 1,625 are Upper upscale.
- 532 of the rooms are Select Service; 2,864 are Full-service



Walk Score

- Walk Score measures the walkability of an address based on its distance to a set of amenities. Walk Score also measures pedestrian friendliness by analyzing population density and road metrics such as block length and intersection density.
- KICC ranks in the lower half of the comp set in terms of Walk Score.



Louisville's Walk Score – 82
Walkable Radius within 20 minutes

Event Matrix

Purpose – Utilize criteria that cause events to drive return to understand the current landscape of events generating the desired outcome AND position Louisville Tourism to support up and coming events to be successful

Process

1

Identify key events currently serviced by Louisville Tourism

2

Rate event on matrix using 13 criteria

3

Identify those events that can grow in specific areas through matrix outcomes

4

Work with organizers on tactics for implementation

Program Components

- Tourism Promotion – Destination Impact
- Benefit to the Destination Brand
- Innovation - uniqueness
- Evidence of Partnerships
- Organizational Structure & Management Capability
- Economic Impact (Direct Spending)
- Quality of Research – understanding of audience
- Suitable Target Market(s)
- Comprehensive Marketing Plan/Approach
- Funding plan
- Evaluation/Measurement Plan
- Room nights
- Scale of Project – future potential

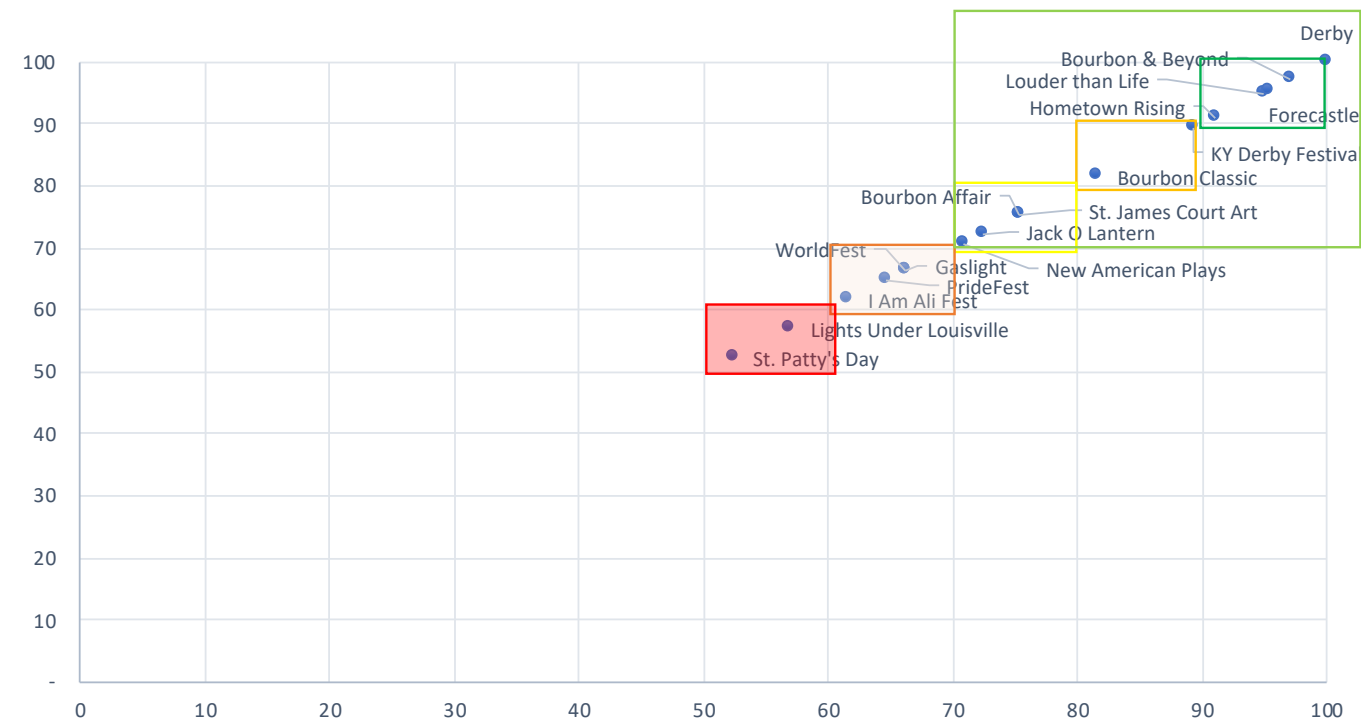
Events Studied

- Kentucky Derby Festival
- Kentucky State Fair
- Louder Than Life, Danny Wimmer Presents (DWP)
- Forecastle Festival
- Bourbon & Beyond, Danny Wimmer Presents (DWP)
- St. James Court Art Show
- Jack-O-Lantern Spectacular
- Hometown Rising, Danny Wimmer Presents (DWP)
- Gaslight Festival Jeffersontown
- Kentuckiana Pride Festival
- WorldFest
- St. Patrick's Day Parade (Ancient Order of Hibernians in America)
- Festival of New American Plays (Actors Theatre of Louisville)
- Highlands Festival
- Louisville Zombie Walk
- Louisville Blues, Brews & BBQ Festival
- Louisville Pride Foundation
- NuLu Business Association
- Big Four Arts Festival
- Kentucky Reggae Festival
- Handbell Musicians of America
- Bourbon Classic
- Kentucky Distillers Association
- Rock the Water Tower
- CFB Events/MagicFest
- Kentucky Derby Festival
- Center for Interfaith Relations
- Louisville Tango Festival
- Louisville's International Festival of Film
- Tailspin Ale Fest
- Ali Festival Week
- Kentucky Bourbon Affair
- WFPK Waterfront Wednesday Concert Series,
- National Street Rod Nationals
- Light Up Louisville

Sample Event Outcomes

Event Name: Kentucky Derby Components	Fail	Poor	Average	Above Average	Excellent	Total Points Awarded
Point Allocation Maximum = 5 points per component	1	2	3	4	5	65 MAX
Program Components						
1. Tourism Promotion – Destination Impact					5	5
2. Benefit to the Destination Brand					5	5
3. Innovation - uniqueness					5	5
4. Evidence of Partnerships					5	5
5. Organizational Structure & Management Capability					5	5
6. Economic Impact (Direct Spending)					5	5
7. Quality of Research – understanding of audience					5	5
8. Suitable Target Market(s)					5	5
9. Comprehensive Marketing Plan/Approach					5	5
10. Funding plan					5	5
11. Evaluation/Measurement Plan					5	5
12. Room nights					5	5
13. Scale of Project – future potential					5	5
Total Maximum possible points = 65	-	-	-	-	65	65

Event Matrix – Draft Outcomes



Stakeholder Survey

607 completed responses

35%

Community Member

18%

Non-Profit/
Organization
Leader

17%

Senior
Executives

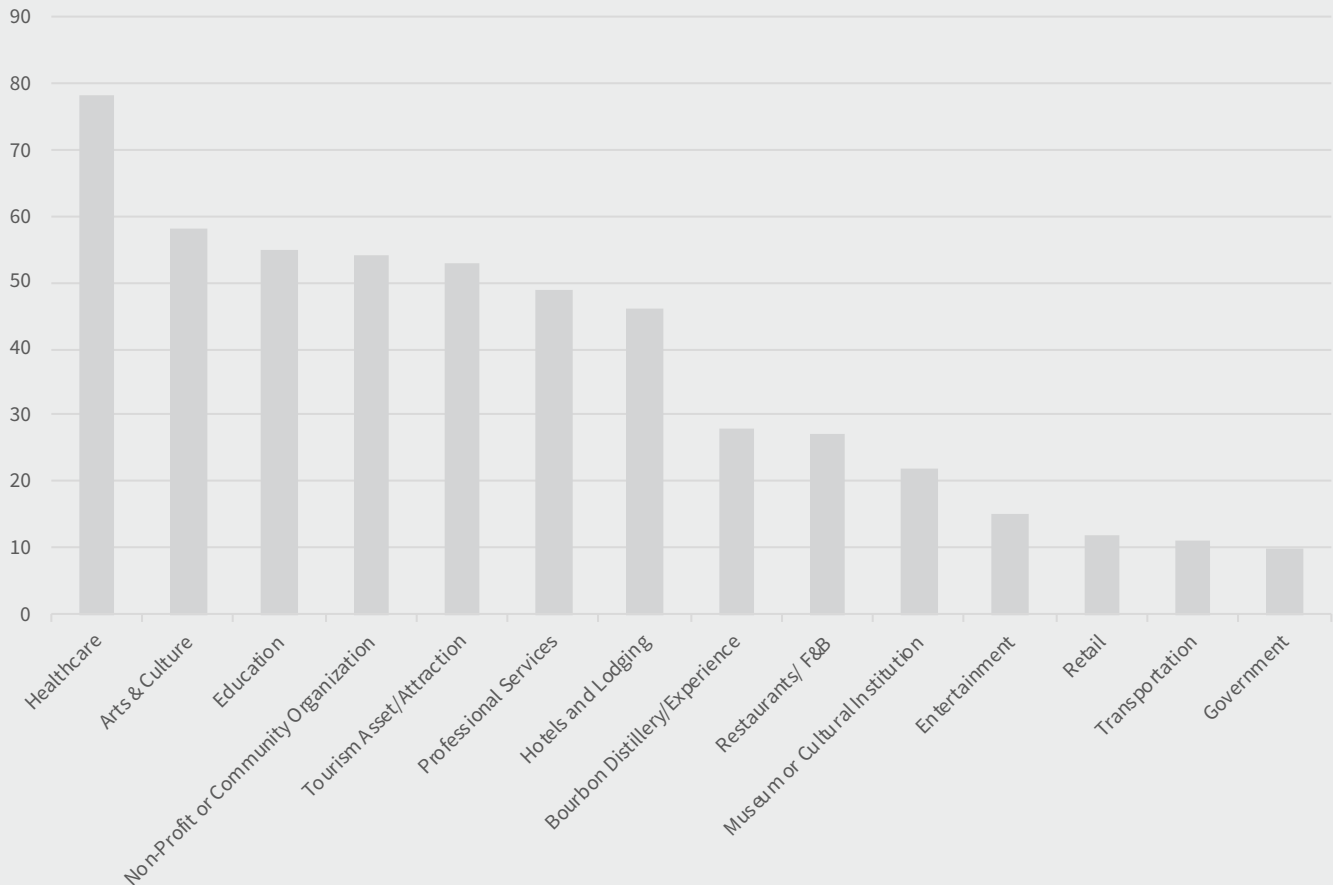
13%

Business
Owners

13%

Other Tourism
Related
Industry
Member

Stakeholder Responses by Industry



SWOT

Strengths

- Bourbon & Distilleries
- KY Derby & Churchill Downs
- Arts & Culture
- Horses
- Food Scene
- Parks

Weaknesses

- Transportation
- Airlift
- Crime
- Parking
- Traffic
- Perceptions & stereotypes

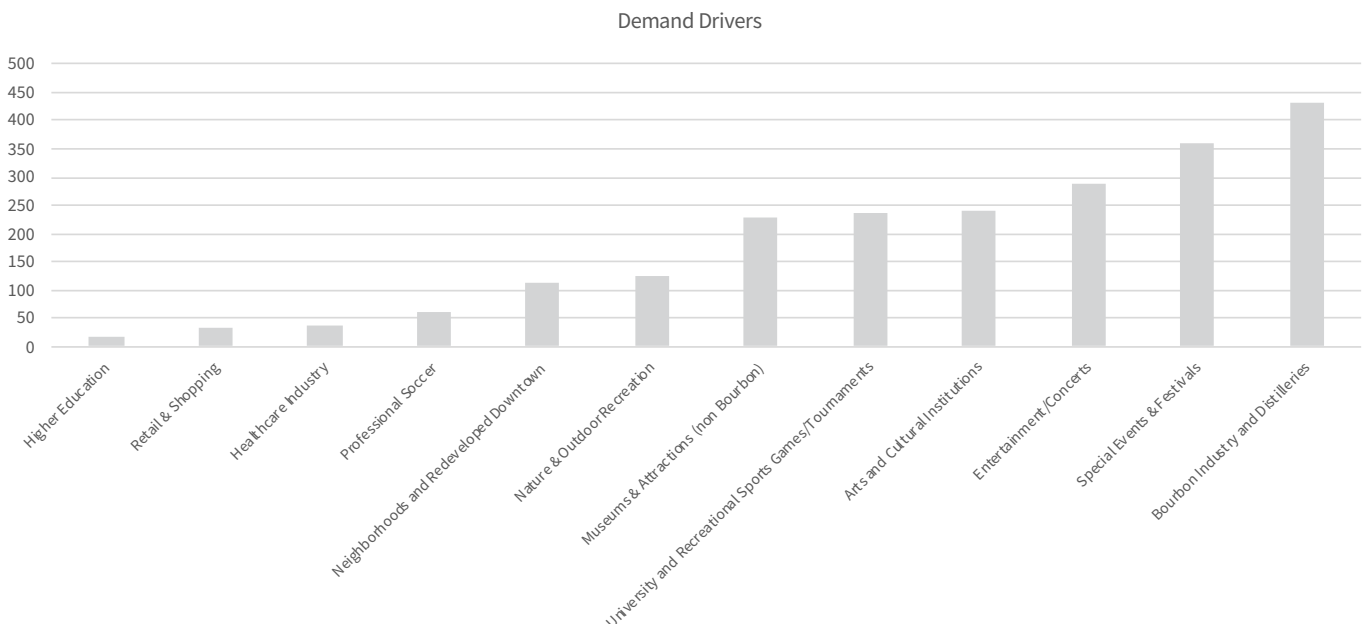
Opportunities

- Waterfront / River
- Arts Programming & Installations
- Bourbon Expansion
- Parks
- Events
- Transportation

Threats

- Homelessness
- Crime
- Safety
- Politics
- Perception
- Funding

Stakeholders believe bourbon experiences, special events and festivals and entertainment are the primary demand drivers.

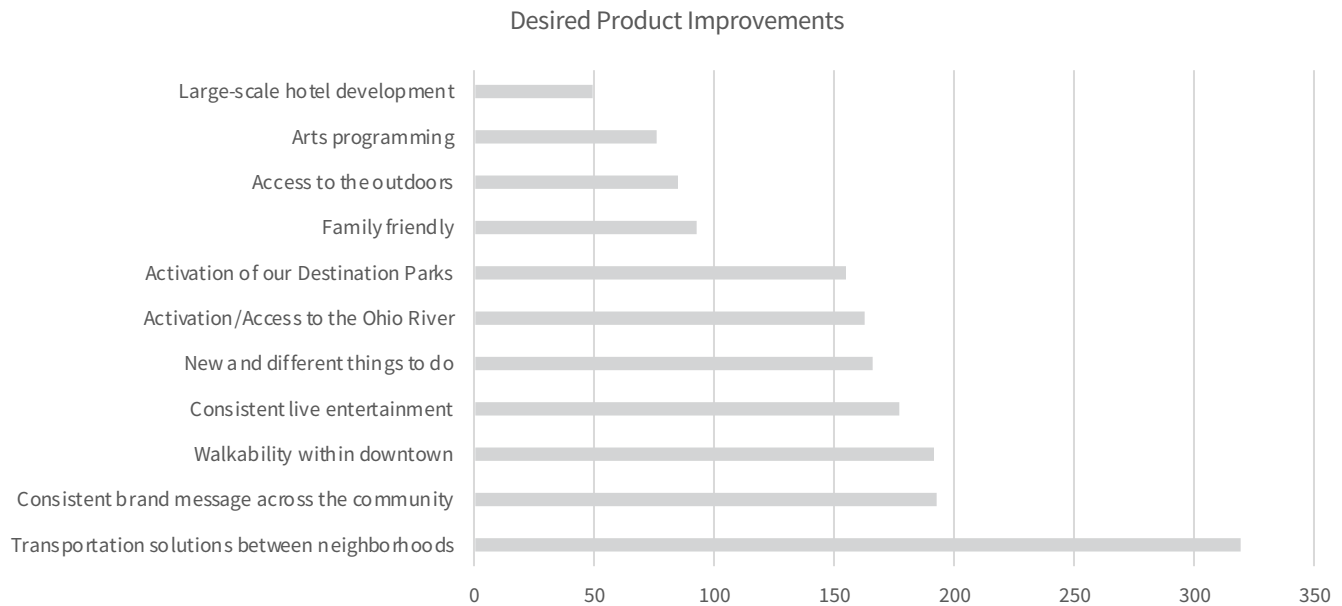


Q7: The following list includes various demand drivers of tourism to Louisville. Based on your perceptions of their appeal to potential visitors, please select what you feel are the top five drivers.

Leisure comparison – when asked how we compare stakeholders gave Louisville's amenities a 3.5-star rating.

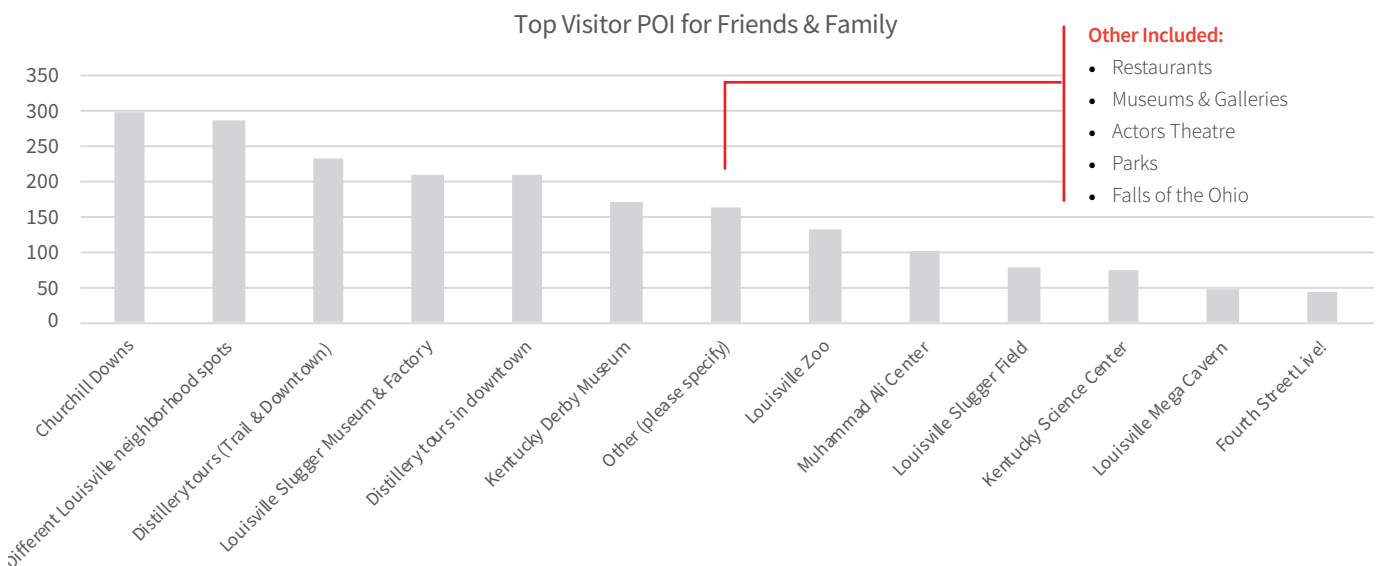


Product Gap – stakeholders see transportation and connectivity as the biggest product improvement.



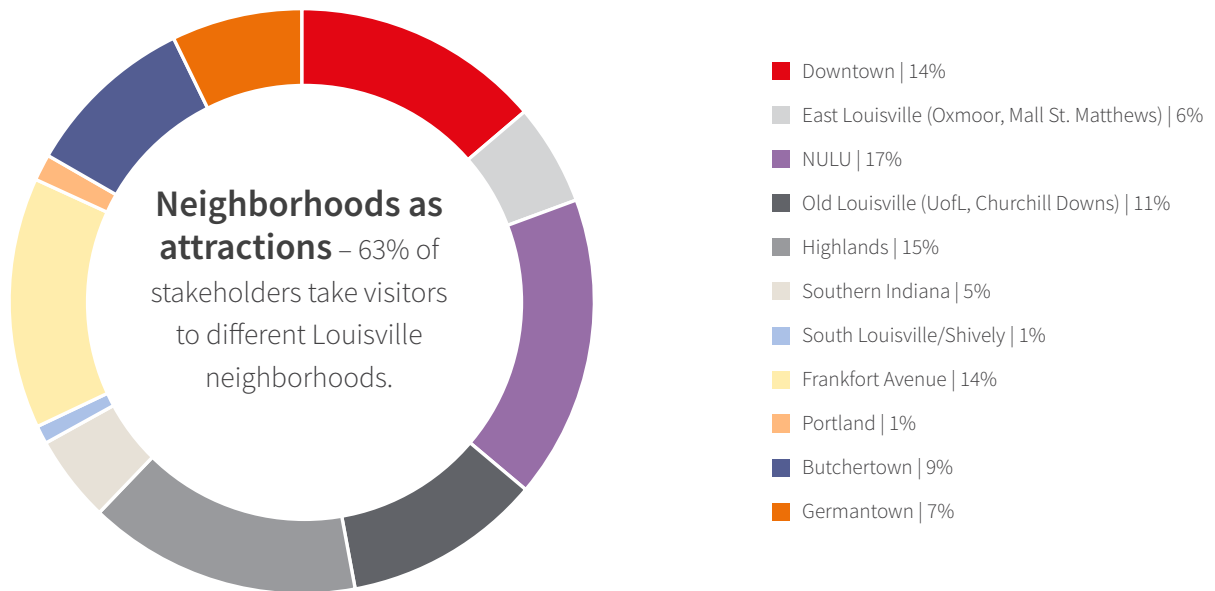
Q10: What do you think is missing from Louisville's package as a tourism destination? Select all that apply.

When asked where stakeholders take visitors Churchill Downs, different neighborhoods, distilleries and the Louisville Slugger Museum and Bat Factory were the top selections.



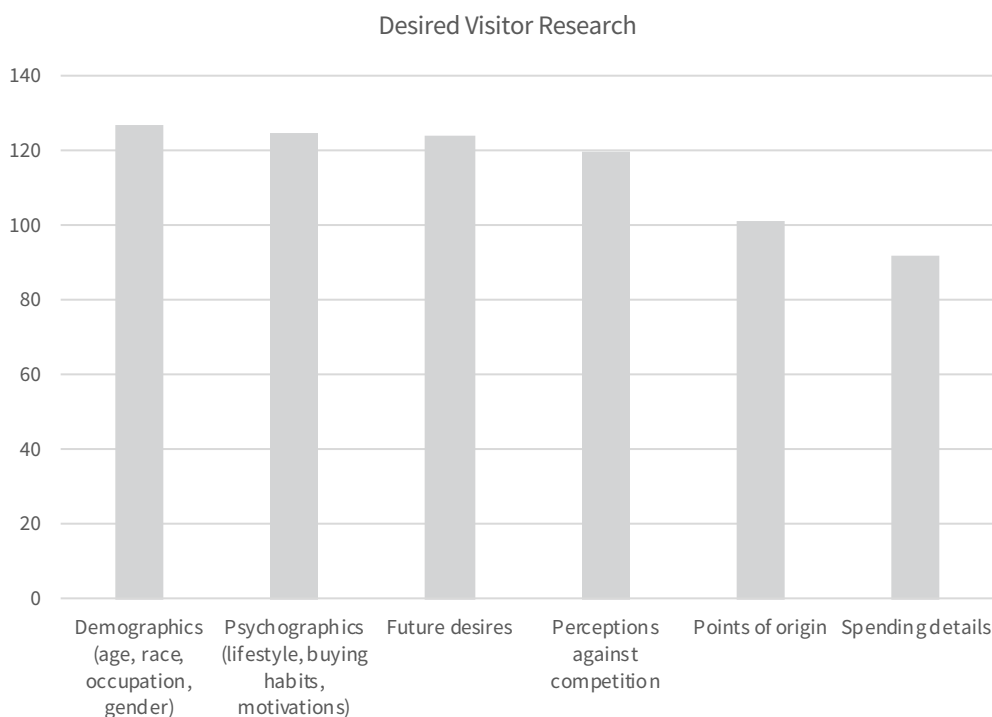
Q11: When friends and family come to visit you, where do you take them? Select all that apply.

Stakeholders Patronage of Neighborhoods with Visitors



Q12: If you have taken visitors to a different neighborhood than where you live or work, which neighborhoods have you visited or recommended? Select all that apply.

Stakeholders' interest in research – 60% of stakeholders want more data on visitors and potential customers with demographics and lifestyle information being the most important.



53%

of respondents are actively involved in visitor research/data collection:

- Marketing campaigns,
- Google Analytics,
- Zip code studies,
- Visitor profiles.

13%

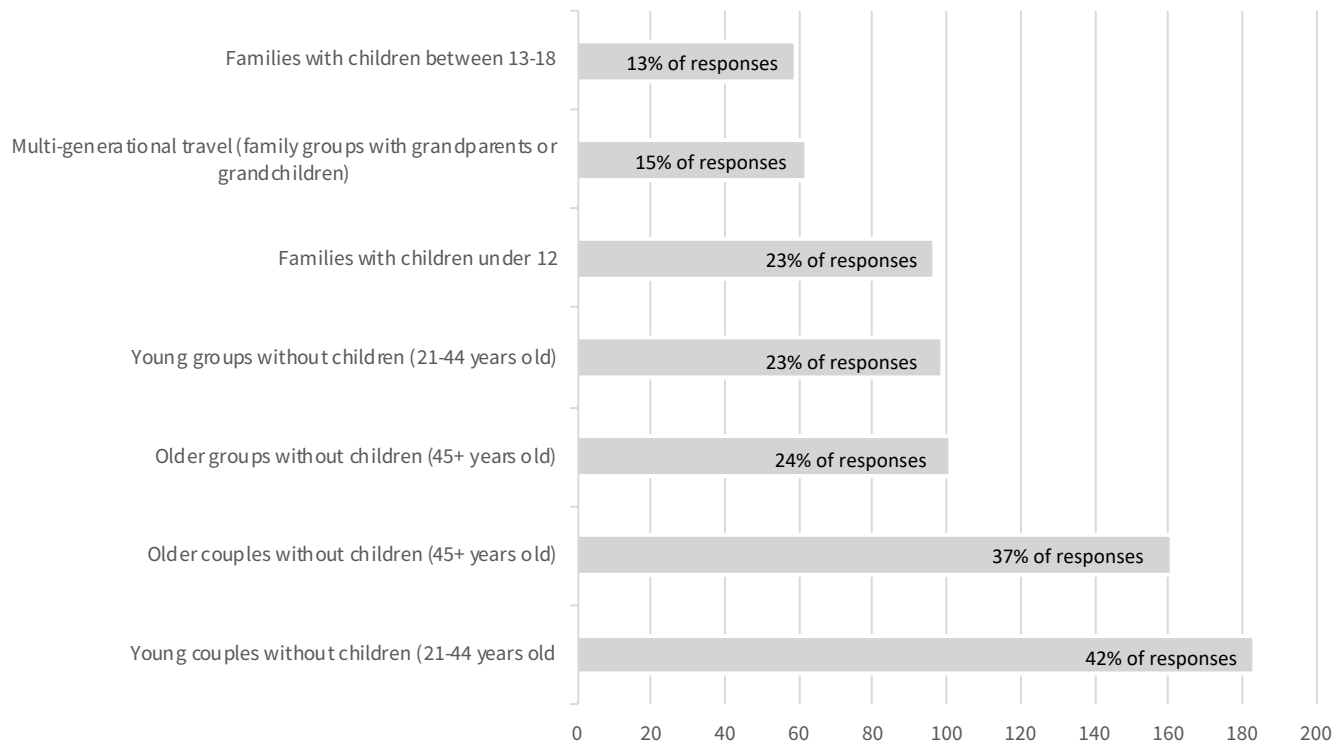
solely rely on Louisville Tourism research.

Q13: What research do you conduct to learn more about your customers? (Select all that apply)

Q14: What more do you want to know about your customers? (Select all that apply)

Perception of current visitor demographics

Who are the current leisure/vacation travelers?



Hotelier Responses

44%

Young couples
(no kids)

44%

Older couples
(no kids)

26%

Young groups

24%

Older groups

17%

Families kids
under 12

6%

Families 13-18

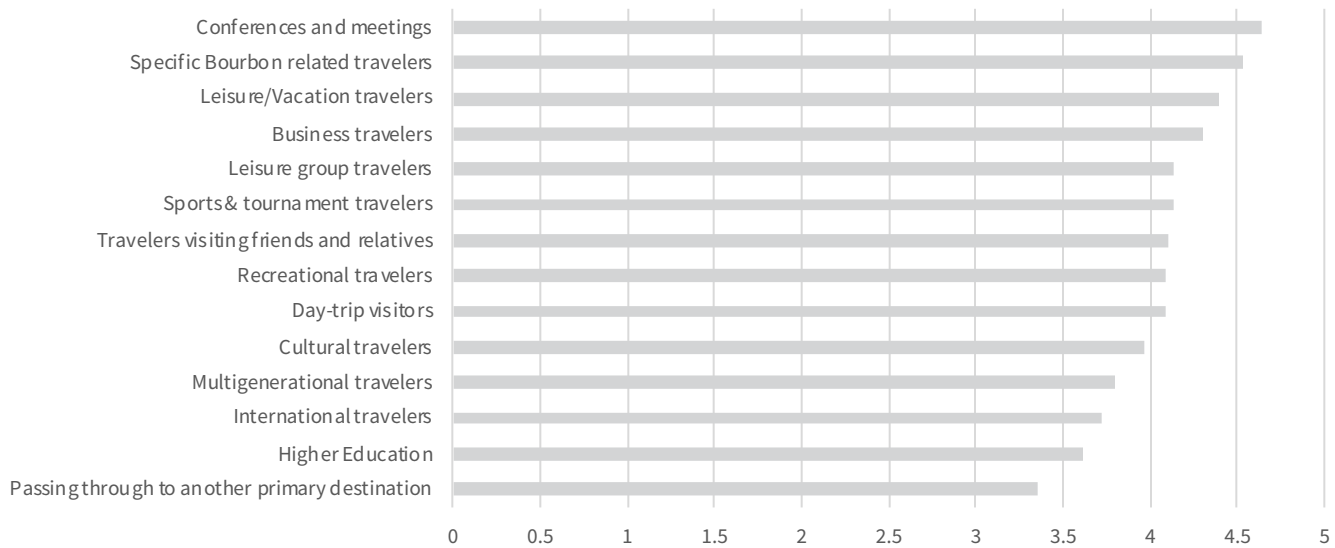
12%

Multigenerational

Q15: In your opinion, what are the top demographics of leisure/vacation travelers coming to Louisville? Please choose the top two.

Visitor market segments

Stakeholder perceptions of the most important visitor segments

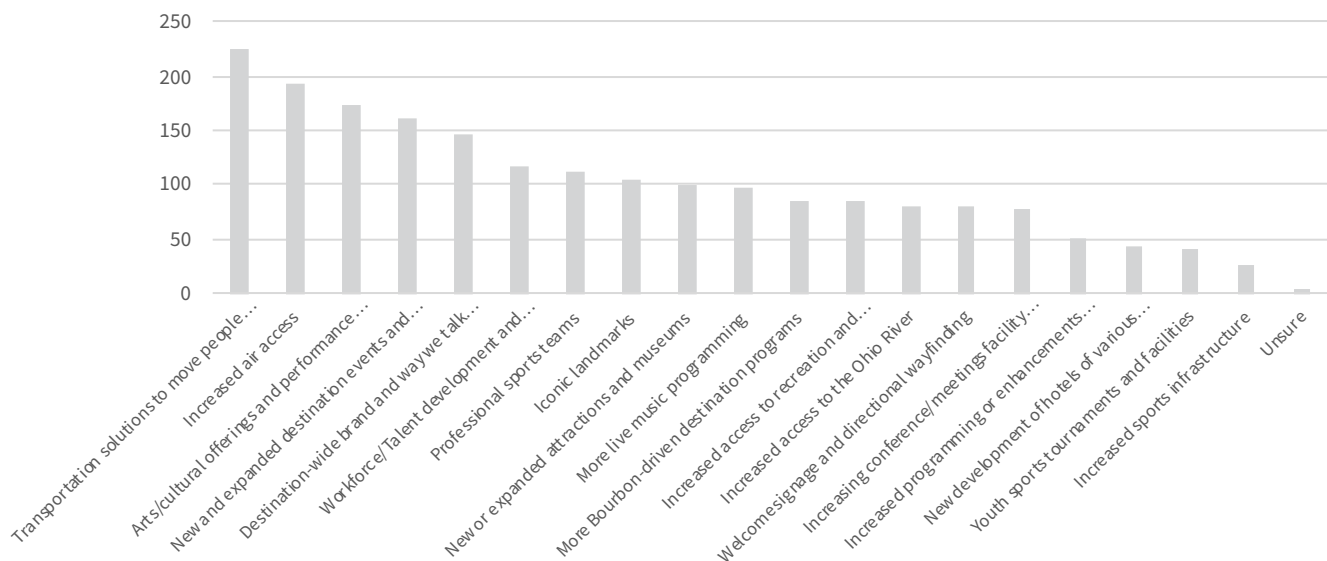


Q16: Based on your perceptions, please rate the importance of each of the following visitor markets for Louisville:

Future investment priorities

- Infrastructure items: transportation and air access
- Arts and culture offerings
- Destination events and festivals driving visitation
- Destination-wide brand message
- Workforce development

Stakeholders' Perception of Future Investment Priorities



Q18: What do you feel should be Louisville's future investment priorities for continuing the tourism industry's positive momentum and attracting visitors during need periods? Please select your top five.

Conventions and meetings

Pros of Louisville for Convention Attendees

Culture **Shopping** **Events**
Affordable
Food Scene
Iconic **Friendliness** **Accessible** **Safe**
Facilities **Clean**

Q19: What are the attributes of Louisville that could make it appealing as a meetings and conference destination? Pick your top five.

Cons of Louisville for Convention Attendees

Airlift
Homelessness
Transportation
Space **Hotel Package** **Safety** **Infrastructure**
Brand

Q20: What real or perceived issues do you feel make Louisville less appealing for potential attendees of meetings and conventions? Please pick the top two in your opinion.

Cultural destination attributes – stakeholders rated our cultural amenities at 3.7 stars out of 5.

Pros of Louisville for Cultural visitors

Walkable **Quantity**
Affordable **Diverse**
Hospitality **Smart** **Quality**
Concentration **Safe**
Accessible **Clean**
Historic



Q21: What are the attributes of Louisville as a cultural destination that make it a good place for visitors? Pick your top five.

Q22: How would you rate Louisville's amenities related to culture? Please use the scale below with 5 stars being the best and 0 stars being the worst.

Summary

- Themes are validating stakeholder focus on group conversations
- Transportation infrastructure is a future priority
 - Airlift
 - Mobility within the destination
- Bourbon driving demand
- Iconic assets are valuable to Louisville's awareness and experience
- Developing neighborhoods are valuable assets that make Louisville unique
 - "Dead zones" and connectivity is a concern
- Quality and concentration of Arts & Cultural amenities is a differentiator
 - But stakeholders don't rate them significantly high compared to others
- Food and culinary scene is high quality
- Brand and messaging is of interest to the stakeholder community



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