JOPLIN INDEPENDENT TOURISM STUDY

March 15, 2018

VISIT JOPLIN MO

CITY OF JOPLIN MISSOURI

DESIGNWORKSHOP

ACKNOWLEDGMENTS

It takes a committed group of community members representing various viewpoints to create a successful plan.

- Becky Zimmermann

TOURISM WORK GROUP

Kristie Barley, Holiday Inn Joplin - Sales Director
Erik Bartlett, The Runaround - Owner
Randall Becker, National Parks - Manager
Wally Bloss - Retired Theater Manager, Arts Promoter/Advocate
Carla Bond, Joplin Parks + Recreation
Kammy Bramlett, MO Division of Tourism Joplin Visitor Center - Manager
Paula Calihan - Retail Owner, former CVB Board Member
Renee Charles, City of Galena, KS - City Clerk (Regional Partner)
Eric Crosswhite - Media, Television
Will Cupps, Rib Crib - Manager
Janice Divine, Red Hot + Blue - Catering Manager
Jim Eaton, Cup Cakes by Liz - Owner
Teresa Gilliam, Wildwood Ranch - Real Estate Development
Morris Glaze - Businessman, former City Council Member
Jackie Hackett, Hackett Hot Wings - Owner
Cameo Harrington, Choice Marketing - Marketing Manager
Lori Haun, Downtown Joplin Alliance
Marshall Hogue - Investments Manager, Arts Events Promoter
Lori Jones, Joplin Family Y, Christian Womens Conference Promoter
Pat Lipira - Retired, MSSU, former JSA Board Member
Mark Lynch, MSSU/Adult Education - former JCVB AB Member
Carolina Neal, Jeff Neal Construction, Historical Preservation
Dwayne Patton - Retired Mall Manager
Loni Smith, City of Joplin - Planner
Mark Turnbull, Joplin Regional Partnership, Joplin Chamber of Commerce
Gale Webb - Bus Company Owner

CVB + CVB BOARD OF DIRECTORS

Patrick Tuttle, Director
Erin Slifka, Director of Sales
Carrie Puffinbarger, Tourism + Events Specialist
Donna Miller, Office Manager

Mike Wilson, Board - Chair, At-Large, MW Sports
Kevin Greim, Board - Co-Chair, Attractions Rep., MSSU - Assoc. VP Development
Miranda Comer, Board - Secretary, Hotel Rep., Towneplace Suites by Marriott - GM
Ginger La Mar, Board - Chamber Rep., Joplin Area Chamber of Commerce
Bob Kluth, Board - Hotel Rep., Sleep Inn - GM
Denise DuBois, Board - Hotel Rep., Homewood Suites by Hilton - GM
Michael Greniger, Board - Hotel Rep., LaQuinta Inn + Suites - Sales
Traci Palmer, Board - At Large, Leggett + Platt - Corp. Travel Office
Lynn Weathers, Board - Retail Rep., Northpark Mall
Jeremy Nienkamp, Board - Restaurant Rep., Texas Road House - Owner/Manager
Media Rep., Currently Open

ADDITIONAL RESOURCES

Christopher Beyer, SW Missouri Lodging Association
Jared Bruggeman, Director of Athletics - MSSU
Craig Hull, Director - Joplin Sports Authority (JSA)
Clifford Wert, President + CFO - Connect2Culture
Pete Hall, General Manager- Residence Inn by Marriott

DESIGN WORKSHOP

Becky Zimmermann, President
Anna Laybourn, Principal + Project Manager
Sarah Horn, Planner



THE FUTURE OF TOURISM IN JOPLIN

Joplin is a community that in 2011 suffered great loss. Residents, businesses, institutions, agencies, volunteers and professionals came together to redevelop and rebuild. An amazing amount of transformation happened in just seven years.

Now the effort is focused on keeping the positive momentum going. Joplin is engaging in a range of economic development to attract businesses, resulting in employment and tax revenue generation. As part of economic diversification, Joplin desires to create an identity as a visitor destination to grow its tourism and hospitality sector.

The Joplin CVB is taking the lead to create an identity and tourism infrastructure that leverages the city's built and natural resources to increase the capture of visitor spending through community assets such as arts and culture, recreation, parks and trails, sports, Route 66, lodging, dining, festivals, downtown and highway crossroads.

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1. Overview & Study Purpose

Joplin Independent Tourism Study

1. Overview



Live Music Downtown



Missouri Southern State University



Route 66 Mural - Downtown Joplin at Pearl Brother Hardware Store, 7th & Main



Silver Creek Glade Trail



Moses Carver House - George Washington Carver National Monument

Joplin is a community with many assets. Tourism can leverage these assets as an economic driver.



Wildcat Glades Conservation Center



Thomas Hart Benton Mural - Joplin at the Turn of the Century, 1896-1906

1. Overview



William Picher - one of many historic landmarks in Joplin

TOURISM STRATEGIC PRIORITIES

- Improve visitor experiences
- Increase number of visitors
- Capture visitor spending
- Emphasize results-driven tourism marketing

1. Overview



Downtown Joplin offers a variety of retail stores, restaurants and galleries for visitors to explore.

"Travel and tourism enhances the quality of life for a local community by providing jobs, bringing in tax dollars for improvement of services and infrastructure, and attracting facilities like restaurants, shops, festivals, and cultural and sporting venues that cater to both visitors and locals ."

visitjoplinmo.com

Joplin has many community assets. The City has a park system with nearly 1,000 acres, a golf course, three swimming pools, 15 miles of walking/biking trails, Wildcat Glades Conservation Center and numerous buildings that are on the National Register of Historic Places for their historic and architectural significance. Joplin is located at a crossroad of two major highways and Route 66. This location is a strength with many travelers choosing Joplin as a stop over.

Primary sectors driving the economy are: Trade, Transportation and Utilities; Manufacturing; Education and Health Services. The City of Joplin desires to further grow and diversify its economy by increasing the tourism sector and capturing increased visitor spending.

Travel and tourism enhances the quality of life for a local community by providing jobs, bringing in tax dollars for improvement of services and infrastructure, and supporting restaurants, shops, festivals, and cultural and sporting venues that cater to both visitors and locals. There are very special places in Joplin. Combined, these places create assets for tourism as an economic driver. While these places are important, developing tourism requires **vision**, **strategy**, **partnerships** and **collaboration**.

To pro-actively improve the tourism sector Joplin must address the following four strategic priorities:

- Improve visitor experiences;
- Increase the number of visitors;
- Capture visitor spending; and
- Emphasize results-driven tourism marketing.

1. Independent Study Purpose & Goals



Joplin Convention + Visitors Bureau Visitor Center

STUDY PURPOSE

- Provide direction for Joplin to help define the focus for future tourism efforts

STUDY GOALS

- Examine Joplin's tourism strengths and weaknesses
- Enhance regional partnerships for tourism support services
- Identify improvements for visitor experiences
- Address tourism facilities & operations
- Forecast short-term and long-term investment needs

1. Study Purpose + Goals



Blue Moon Market offers an eclectic shopping experience for Joplin visitors. Banners advertising various downtown events bring attention to the area and provide visitors with information they need to make decisions about the time they spend in Joplin.

STUDY PURPOSE

The purpose of this study is to provide direction for where Joplin can and should go and focus for the future of tourism efforts.

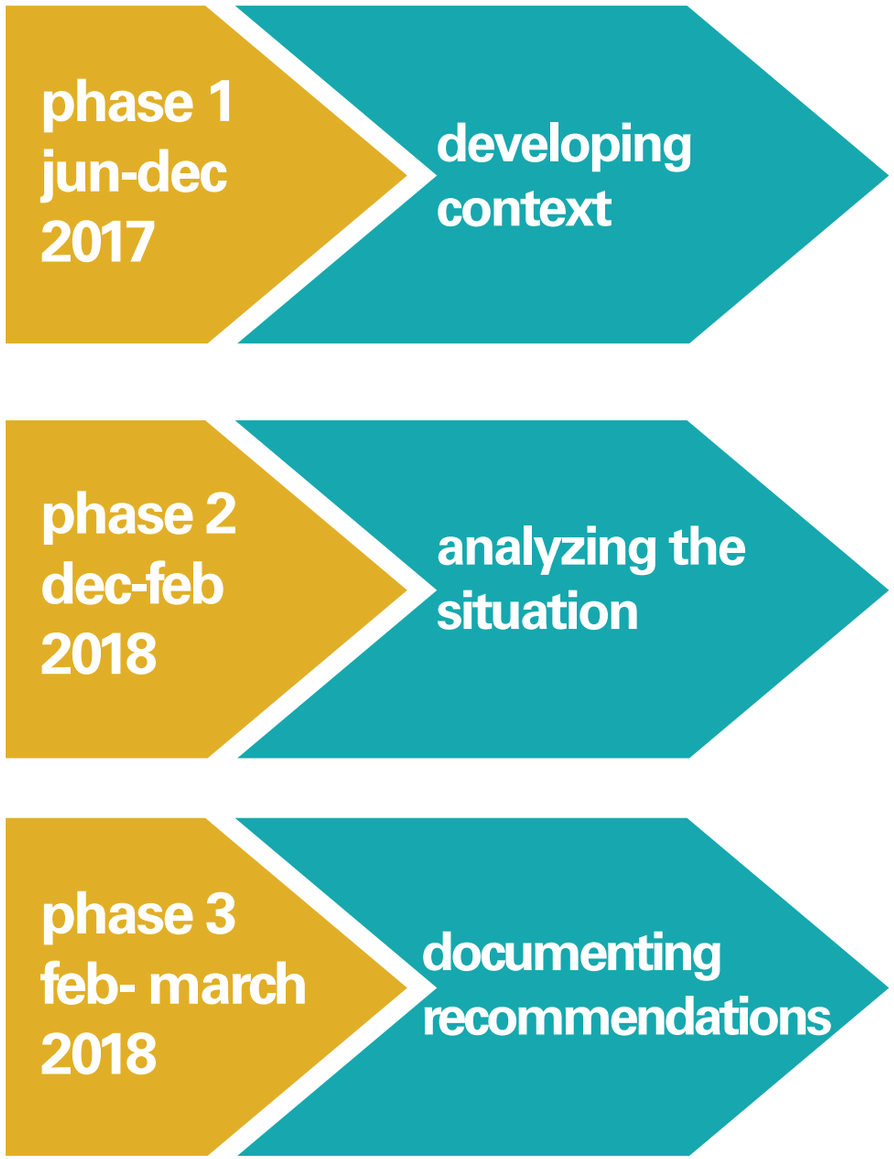
STUDY GOALS

The role of this study and report is to provide independent examination of the Joplin Convention and Visitors Bureau and other visitor service providers, facilities, and tourism support infrastructure. This study identifies Joplin's current strengths and challenges in addressing the four strategic priorities. It also examines from a visitor experience perspective the areas for improvement. The results of this examination are recommendations for strategic investments and critical decisions that will enhance the future of tourism in Joplin. It includes recommendations for operational improvements, partnerships, and tourism support services. The study provides Joplin with an understanding of short and long-term investment needs and possible funding opportunities.

2. Evaluation Process

Joplin Independent Tourism Study

2. Evaluation Process



2.1 PROJECT PHASES

- Needs Assessment
- Tourism Work Group Working Papers
- Identify gaps through current Conditions Assessment + Competitive Markets Analysis
- Prepare report, including recommendations and investment options
- Implementation to be led by the CVB Advisory Board

2. Evaluation Process

phase 1
jun-dec
2017

developing context

- Meetings
- Tourism Work Group Briefing Papers
- Current Conditions Assessment
- Competitive Markets Analysis

phase 2
dec-feb
2018

analyzing the situation

- Discussions with CVB staff
- Additional research
- City Council Work Session (Feb 12)

phase 3
feb - mar
2018

documenting recommendations

- Final report
- Volume II

The project was completed in three phases that helped frame and organize.



Various groups provided input throughout the process, including community members, CVB staff, CVB Board members, JSA, the Tourism Work Group, City Council members and the Design Workshop consultant team.

2.1 ABOUT DESIGN WORKSHOP

Founded in 1969, Design Workshop is a Colorado based international strategic services, tourism planning, urban planning + design and landscape architecture firm. Over the course of the last 49 years, Design Workshop has worked in communities throughout the world, completing tourism and economic development plans for a variety of communities, including Branson, Missouri, North Lake Tahoe, California and most recently, Los Alamos, New Mexico.

2.1 PROJECT PHASES

The project was broken into three phases :

Phase 1: Developing Context
Project Start-up + organization; Tourism Work Group Briefing Papers; Current Conditions Assessment; Competitive Markets Analysis
Phase 2: Developing Recommendations
Recommendations, prioritization, resolution of goals, presentation
Phase 3: Documenting + Communicating Plan Vision
Draft report, final report, presentation

2. Evaluation Process



2.2 INPUT SOURCES

- CVB Board, Tourism Work Group and other Stakeholders
  - » Institutional knowledge
  - » Issues + opportunities
- City Council
  - » Comments on initial recommendations
- Design Workshop
  - » Experience, research
  - » Recommendations

2. Evaluation Process



Downtown Joplin

2.3 TOURISM WORK GROUP

- 26 contributors representing visitor services, business development and resident interests
- Working Paper Topics
  - » Lodging & Hospitality
  - » Marketing, Advertising, Communications, Market Position
  - » Visitor Facilities & Services
  - » Transportation
  - » Events, Recreation & Activities
  - » Institutional & Management Structure
  - » Finance & Funding
  - » MSSU Economic Impact

2. Evaluation Process

2.2 INPUT SOURCES

Input was received from a variety of stakeholders, including CVB staff, the CVB Board of Directors, JSA, MSSU, Connect2Culture, and various community groups and individual community members.

2.3 TOURISM WORK GROUP

Along with input from stakeholders, the Tourism Work Group was formed to help inform the planning process. This group was relied upon, based on members' subject matter expertise, to prepare a series of Working Papers describing and evaluating Joplin's current conditions, challenges and opportunities as they relate to tourism.

2.4 RESEARCH + PREVIOUS STUDIES

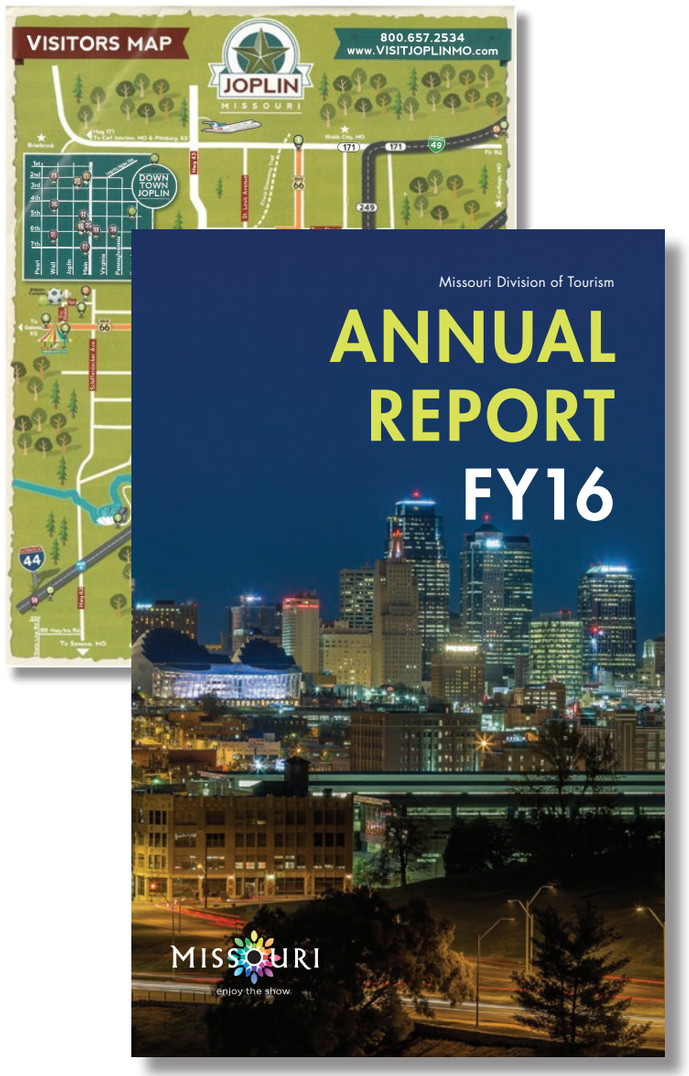
Design Workshop's experience and research, along with a review of over 30 previous reports and studies also helped provide a strong foundation for this report. The Design Workshop team also prepared the following:

- SWOT Analysis (discussed in Section 4) describing Joplin's tourism strengths, weaknesses, opportunities and threats
- Current Conditions Assessment assessing Joplin's current tourism support systems



More than 30 reports were reviewed to help provide context and a foundation for this report.

2. Evaluation Process



2.4 RESEARCH: PREVIOUS STUDIES

- Reviewed over 30 studies and reports
  - » CVB plans & reports
  - » Vision 2022
  - » DestinationNEXT Reports
  - » Madden Media Reports
  - » City of Joplin plans
  - » Missouri Division of Tourism reports
  - » JSA reports
  - » Connect2Culture plans
  - » Report of the Economic Impact of MSSU
  - » Regional studies and plans

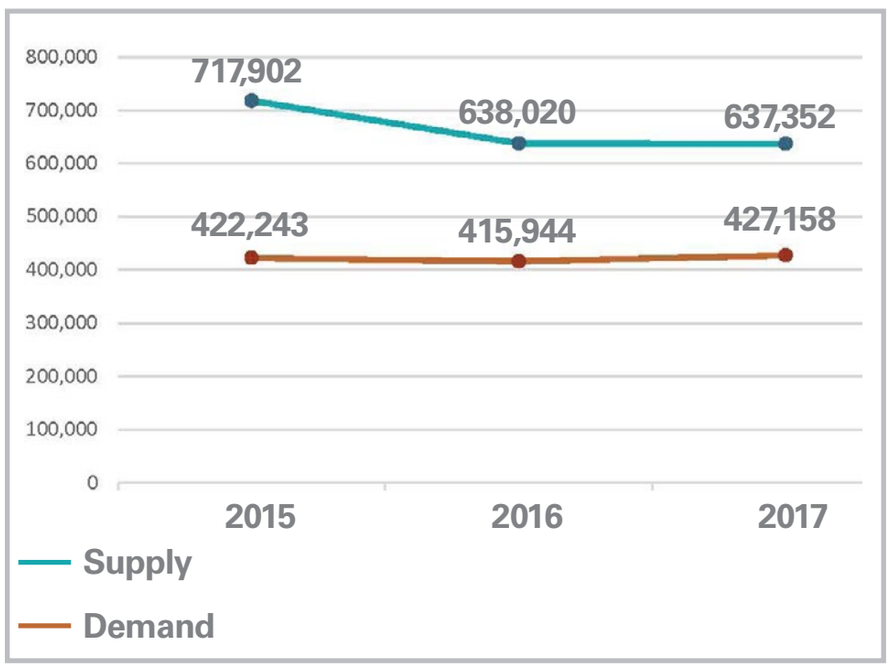

VISITORS MAP
JOPLIN
MISSOURI
800.657.2534
www.VISITJOPLINMO.com
Hwy 171
To Carl Junction, MO & Pittsburg, KS
Briarbrook
Webb City, MO
171
49
Fir Rd.
DOWN TOWN JOPLIN
1st
2nd
3rd
4th
5th
6th
7th
Pearl
Wall
Joplin
Main
Virginia
Pennsylvania
Kentucky
Langston Hughes Blvd
Hwy 43
St. Louis Avenue
Frisco Greenway Trail
ROUTE 66
Zora Street
Newman Rd
Florida Avenue
Northpark Lane
4th Street
7th Street
Murphy Blvd
Range Line Road
Duquesne Road
Prosperity Road
Schifferdecker Ave.
Madden Lane
15th Street
20th Street
Main Street
26th Street
Connecticut
32nd Street
SEE INSET TOP LEFT
SEE INSET TOP RIGHT
HOTEL DISTRICT
between I-44 & 32nd Street
32nd Street
Range Line Rd
Hammons Blvd
36th
Hammons
exit 8
44
249
71
exit 18
exit 11
59
Carthage, MO
Diamond, MO
To Galena KS
Low Water Bridge
exit 6
Glendale Blvd
(to Grand Falls)
HWY 86
Gateway Drive
Saginaw Road
V Highway
Carver Rd.
Shoal Creek
Redings Mill
NN
Dutch Elm
exit 4
Hospital
To Seneca, MO
To Arkansas
N
W
E
S
LEGEND
ATTRACTION
ARTS & CULTURE
LODGING
PARTICULARS
RECREATION
SHOPPING

3. Joplin & Competitive Markets

Joplin Independent Tourism Study

3. Joplin and Competitive Markets

Joplin Lodging Room Nights Supply & Demand



While supply has decreased, demand is relatively unchanged. Additional lodging coming online in 2018 will increase supply to be similar to the 2016 supply.

Source: Missouri Hotel & Lodging Association STR Report Dec 2017

3.1 CURRENT CONDITIONS

- SWOT Analysis
- Tourism Support Systems
- Current Conditions Assessment
  - » Convention, Events & Meeting Space
  - » Destination Attractions & Events
  - » Route 66
  - » Sports Tournaments
  - » Institutional Structure & Funding

4. Joplin + Competitive Markets

It is important to keep in mind that **strengths** *and* **weaknesses** *can be controlled, influenced or mitigated.*

Opportunities *and* **threats** *cannot be controlled but the reaction to them can be managed.*

4.1 CURRENT CONDITIONS: JOPLIN STRENGTHS, WEAKNESSES, OPPORTUNITIES + THREATS (SWOT) ANALYSIS SUMMARY

CORE STRENGTHS

- Hotel capacity and healthy occupancy rates
- Attractive and thriving downtown that has a comfortable walking scale
- Variety and number of dining options
- Sports market supported by a variety of entities
- Route 66, bus and motor coach tours
- Destination attractions with a regional draw include sporting events, recreation, Wildcat Glades Conservation Center, historic sites, and cultural offerings
- Dedicated CVB staff connected to the community and providing a Joplin web-based presence
- Dedicated lodging tax funding source

KEY WEAKNESSES

- Lack of significant attractions or facilities enticing people to stay an extra day
- Many attractions located on periphery of town, making it challenging to direct travelers to downtown or have them stay to take-in multiple attractions
- No downtown hotels
- Transit does not serve tourism attractions, hotels or services
- Low participation in the lodging association
- No clear Joplin identity brand
- Little community support/engagement in visitor hospitality
- Lack of institutional structure integrating CVB and recreation
- Multiple websites with different messages
- Lack of information about visitors to direct tourism strategies
- Joplin Convention & Trade Center closing in February 2018 creating a lack of large convention facilities
- Visitor Center needs updating

POTENTIAL THREATS

- Limited air access
- Aging demographics of Route 66 visitors
- Deterioration of Route 66 landmarks and lack of interactive attractions
- Casino competition and lack of collaboration
- Inadequate funding for tourism marketing as compared to competitor destinations
- Facilities for large groups have not been maintained or upgraded to meet visitor expectations
- Lack of foresight regarding the next generation of visitors and an understanding of their needs and expectations

GREATEST OPPORTUNITIES

- Two major highways, Historic Route 66, and motor coach route
- Visitation in all seasons and year-round comfortable weather
- Arts and culture community engagement and investment in downtown
- Future regional trail system extensions and run bike/run events connections through Joplin
- Future hotel additions/ development interest
- Educational institutions introduce people to the area
- Tri-state area to draw visitation
- Rich history of the region

3. Joplin + Competitive Markets

3.1 JOPLIN CURRENT CONDITIONS

Lodging and Tourism Support Systems

- Sufficient lodging inventory with 23 hotels, 1,919 rooms, ranging in price and a 637,352 room night supply in 2017.
- Occupancy rates healthy, at 58-69%.
- ADR is lower than state average (2017: MO - $99.38, Joplin - $85.15).
- Hotel Supply & Demand:
  - » While supply has decreased, demand is relatively unchanged.
  - » In 2015, supply was at 717,902 room nights, while 2017 was at 637,352.
  - » In 2015, room night demand was at 422,243 and in 2017 there was a demand for 427,158 room nights.
- Joplin Transient Guest Tax is a 4% tax charged on all lodging properties within the City of Joplin tax base. The most recent increase to this tax was in 2000. Joplin Occupancy Tax Totals:
  - » 2014: $1,317,280
  - » 2015: $1,328,157
  - » 2016: $1,400,871
  - » EOY FY17=$1,456,982

Convention Space

- Joplin Convention & Trade Center closed in 2018.
- Eleven standalone meeting spaces, averaging 6,227 square feet, for a total of~48,256 square feet of dispersed event space within Joplin.
  - *Current meeting space inventory does not accommodate groups large enough to create an impression on the Joplin hotel market or demand within other economic sectors.*
- Joplin lost the sale of 8,900 room nights in the last two years because it did not have a place to hold group events (*source: CVB*).
- Lost business due to unsuitable nature of facility types & space configurations, locations, conditions and lack of amenities.

Destination Attractions & Events

- Prime drivers: local businesses and leisure travelers
- Sightseeing transportation popular via Motorcoach travel (overall sales totaled $11,527, 300 in 2016).
- Potential to capture more visitor dollars by focusing on those drawn to particular events.

Route 66

- Estimated 7,000 - 8,000 visitors annually to Joplin.
- Along the entirety of Route 66, international travelers outnumber American tourists.
- Route 66 travelers tend to be older and are highly motivated travelers who want to cross it off their "bucket lists".
- No iconic historic attractions or experiences along Route 66 in Joplin to draw **overnight** visitors.

Sports Tournaments

- Sports tournaments hosted by Joplin include: intercollegiate and amateur baseball, tennis, cross country, soccer, volleyball and basketball.
- MSSU hosts a variety of collegiate sporting tournaments and athletic attendance in 2016 was 90,293, with a total of 109 hosted games.
- A variety of facilities are used for sporting events, but the city lacks a large, multi-use indoor sports facility.

Tourism in Missouri generated a **$16.5 billion impact** *in FY2016, an increase of 3.6% from FY2015.*

This economic impact is based upon the spending of an **estimated 41.7 million visitors** *to Missouri.*

Missouri Division of Tourism Annual Report FY2016

Information Sources:
Lodging + Tourism Support Systems:
Missouri Lodging Association 2017 STR Report
Joplin ADR & Occupancy STR Report

Convention Space:
Joplin CVB

Destination Attractions & Events:
American Bus Association – ABA Foundation Economic Impact of the Group Travel and Tourism Industry Motorcoach Market: Motorcoach Group Tourism helps drive the economy in Joplin, Missouri (2016)

Route 66:
www.wmf.org
www.news.illinois.edu
www.route66news.com

Sports Tournaments:
macvb.com/showmesports
JSA reports

3. Joplin + Competitive Markets



Spiva Center for the Arts' mission is to "celebrate the creative experience." The Center's vision is to "be a community catalyst, joining culture, community, education, business, and the arts as one, endeavoring to be a model for art centers across the nation." spivaarts.org

The Joplin CVB spends 10% of their overall budget, or approximately $140,000 on marketing efforts.

Institutional Structure + Funding: Joplin Convention and Visitors Bureau

- FY17 Budget: ~$1,400,000
- Focus: Drive demand to destinations and grow visitation to Joplin
- City-governed agency - director is a department head with oversight provided by an 11-person advisory board
- Staff (4 full-time employees):
  - » Director
  - » Director of Sales
  - » CVB Tourism & Events Specialist
  - » Office Manager
- Complimentary Services:
  - » Checking hotel/meeting space availability
  - » Providing welcome packets
  - » Arranging site tours
  - » Connecting visitors to local attractions
- The CVB was established in 1988 with voter approval of the Joplin Transient Guest Tax. The tax is to be used to promote tourism, conventions and other related activities in the city.
  - » The Joplin CVB is funded exclusively from receiving 70% of the lodging tax.
  - » In FY2016, $120,000 of this budget was allocated for grants, $538,336 for administration and $521,701 for special projects.
  - » In FY2017, the CVB budget was $1.4 million.
  - » For FY18 the projected revenue from lodging tax is $1,355,000
- Key market responsibilities:
  - » Positions the collective elements of the travel and tourism infrastructure within the Joplin region as a premier destination.
  - » Plays a significant role in creating a regional economic impact for industry partners, while increasing visitation and delivering the best possible visitor experience.

Institutional Structure + Funding: Joplin Sports Authority

- FY 2017 Budget: $380,000
- Non-profit 501(c)3. JSA is one of only 3 standalone Sports Authorities in Missouri (the other two are in Kansas City and St. Louis)
- Funded exclusively from the 4% lodging tax (Joplin Transient Guest Tax). From this tax, JSA receives 30%.
- Agreement with City of Joplin to "promote sports marketing for regional, national and international sporting events for the City, including, but not limited to, attracting, promoting, supporting and managing sports events. Its main responsibility shall be the promotion of the City of Joplin as a sporting event destination and management of such events."

* Information provided by Joplin Convention & Visitors Bureau.

3. Joplin and Competitive Markets

Convention & Visitors Bureau Budgets FY2017



Source: Joplin CVB

3.2 COMPETITIVE MARKETS

- Selected Cities
  - » Branson, Missouri
  - » Cape Girardeau, Missouri
  - » Springfield, Missouri
  - » Bentonville, Arkansas
  - » Wichita, Kansas
- Key Tourism Topics
  - » Convention, Event & Meeting Space
  - » Destination Attractions & Festival Events
  - » Sports Tournaments
  - » Planning for the Future of Tourism

3.2 Joplin + Competitive Markets

Joplin desires to increase the number of visitors coming to the city for a variety of reasons.

As it explores what it takes to be a competitive draw in the region, it is important to benchmark Joplin against its actual or perceived competition.



Bentonville, Arkansas boasts a variety of pedestrian and biking trails throughout the city. Bike Bentonville, a subsidiary of the City of Bentonville and its tourism bureau, Visit Bentonville. Bike Bentonville's mission is "to promote and enhance a bicycle-friendly culture for residents and tourists." www.visitbentonville.com/bike

3.2 COMPETITIVE MARKETS

BRANSON, MO

Budget: FY2017: $13M

Primary Market/Market Positioning/Brand
"No matter how you love to vacation, Branson offers something for everyone."

After decades of catering to an older demographic, Branson is now becoming known throughout the Midwest for its outdoor amusement offerings, which are aimed at a younger demographic.

Outdoor attractions and activities include:

- Table Rock Lake/Ozark Mountains
- Hiking, biking, camping, boating
- Horseback riding, fishing, hunting
- Trap + skeet shooting
- Spelunking, rock climbing

Convention Space

- Branson Convention Center 2016 Estimated Group Attendance: 92,000
- Number of 2016 Groups: 193

Sports Tournaments
The Branson Community Plan 2030 states that "sports and recreation provide some balance to the seasonal entertainment economy and have considerable growth potential… The community hopes to continue to grow the sports market by attracting additional tournaments, hosting more regional and national sporting events and by maintaining cooperative partnerships with the Branson Lake Area Chamber of Commerce/CVB and convention center facilities."

Branson RecPlex, which opened in 2005, hosts over 40 state, regional and national sporting tournaments each year. It has hosted 12 national sports tournaments, including USSSA baseball and teams from the Amateur Athletic Union (AAU) and over 100 state and regional events in baseball, basketball, volleyball, swimming, tennis and martial arts.

Notable Information
Live music and entertainments shows, Silver Dollar City, Christmas shows, Big Cedar Lodge, water parks

CAPE GIRARDEAU, MO

Budget: FY2017: $716,112

Primary Market/Market Positioning/Brand
Primary markets for Cape Girardeau include sports tournaments, conferences and leisure travel. The city's nickname is "The Cape".

Convention Space
Drury Plaza Hotel + Conference

3.2 Joplin + Competitive Markets

Cape Girardeau has the most similar tourism identity and market to Joplin. With many of the same types of attractions, there are valuable points of comparison for marketing and investments.

Center (160 guest rooms) – opened in 2017, funded via public-private partnership. Before built, hospitality research firm HVS conducted a feasibility study which estimated that 27,000 room nights were being turned away each year.

The Conference Center, valued at more than $11 million to build, was funded by three sources:

- Participating hotel owners in the area volunteered to pay one percent of their hotel revenue for up to 20 years, or until their combined contribution with the City meets $6.25 million
- Drury Southwest contributed at least $4.75 million (during the lifetime of the project, a donation of the rental cost for a single day's use of the entire conference center will be made to the City annually)
- City contributed approximately $2.45 million – paying an amount equal to 1.5 percent of the revenue from conference center for up to 20 years, or when their combined contribution with the hotel owners meets $6.25 million

Sports Tournaments
The SportsPlex, an indoor sports facility, opened in May of 2017. The Parks and Recreation Department operates the facility, and the City hired a facility supervisor to operate the facility, along with a recreation coordinator, administrative secretary, several maintenance staff and part-time workers.

- 121,000 sf facility on 10-acre site
- $12 million design-build project
- City set aside $1.65 million in restaurant tax money to subsidize operations for the first five years

Notable Information
Conservation Center, Cape River Heritage Museum, Cape Splash Aquatic Center, Bootheel Bluegrass Festival

SPRINGFIELD, MO

Budget: FY2017: $3,607,525

Primary Market/Market Positioning/Brand
The primary market for Springfield is the leisure traveler, followed by business visitors.

Convention Space
Springfield does not have a stand-alone Convention Center. There are several events spaces available, including the University Plaza Hotel + Conference Center with the Springfield Expo Center across the street (120,000 total sf of meeting space), the White River Conference Center and several area hotels.

Sports Tournaments
Springfield hosts four large soccer tournaments each year, and several smaller basketball and volleyball tournaments and leagues.

Notable Information

- Being home of Bass Pro Shop is the big focus for the future. Also, with the recent addition of the $290M Wonders of Wildlife, room counts are up approximately 10%, according to Tracy Kimberlin, CVB President & CEO.
- The CEO of Bass Pro Shop, John Morris, and a powerful member of the community, is continuing to invest in development in the area.
- No big investments in Route 66 are planned, as the tourism along the route seems to take care of itself and the market for Route 66 is niche – international travelers.
- The downtown event center is adding another banquet hall, rooftop bar and more through renovation of an adjacent building
- 500 hotel rooms are in the works with four new hotels underway.
- Attendance is up 66% during the past five years at the Springfield Art Museum - prompting the hire of a consultant to develop a master plan for improvements to the building and grounds.

Funding Sources

Branson Lakes Area Chamber of Commerce:

- Dues + non-dues revenue
- Two contracts with two taxing jurisdictions
- Hotel tax

Cape Girardeau CVB:

- 4% Hotel Tax
- Restaurant tax fund to subsidize new indoor sports facility operations
- Conference Center: participating hotel revenue contribution + Drury Southwest donation

Springfield CVB:

- 47% of 5% bed tax

Bentonville CVB:

- 2% hotel tax
- 1% restaurant tax
- CVB seeks event partners to provide additional funding

Wichita CVB:

- 6% hotel/motel tax
- Additional $100,000 from City if CVB matches with private funds
- Tourism Business Improvement District 2.75% fee per night on hotels with 50+ rooms

3.2 Joplin + Competitive Markets

Driving Distances in Hours from Competitive Markets to Joplin

Branson: 1.45
Cape Girardeau: 5.25
Springfield: 1.25
Bentonville: 1
Wichita: 3.25

Google Maps

Branson, MO; Cape Girardeau, MO; Springfield, MO; Bentonville, AR; Wichita, KS: See Competitive Market Study in Volume II for information sources for each city.

- A new visioning committee has been formed to identify and cultivate the Springfield identity (including a vision and values community input process).

BENTONVILLE, AR

Budget: FY2017: $2.2M

Primary Market/Market Positioning/Brand

Bentonville is home to the Walmart headquarters and the Crystal Bridges Museum of American Art, built in 2011, which houses a world-class collection of American art.

New parks, public gardens, museums and restaurants are revitalizing the city and it is being marketed as "a new American town." Bentonville has also created districts, including the Arts and Market Districts, and the vision is to transform this area into a "thriving community centered around food education, production and entrepreneurship."

As a gateway to the Ozarks Bentonville has invested in outdoor recreation infrastructure including regional and local parks, city bike loops, and a trails system, to serve the community as well as attract visitors.

Convention Space

The City is exploring options to build a large-scale meeting/convention center and hotel downtown, but the amount of investment needed is large and finding investors has proven to be difficult.

Sports Tournaments

Biking and running events are the focus of sports attraction marketing.

Notable Information

According the Mayor, the City's goal is "to make Bentonville the best downtown you could find anywhere."

In 2007, residents approved a $110 million bond issue. Parks received $15 million, streets, $85 million and police and fire, $4.75 million each.

In 2014, the City completed a redevelopment plan that created an Arts and a Market district, encompassing an 18-acrea area near the town square. Several million dollars of private investment were made within 18 months.

WICHITA, KS

Budget: FY2016: $2.4M

Primary Market/Market Positioning/Brand

Forty percent of visitors come for business, either conventions or business meetings. Many additional visitors drive from western Kansas for shopping. The CVB encourages these visitors to extend their stay in Wichita.

Convention Space

Wichita has a large convention center, Century II Performing Arts + Convention Center, with more than 200,000 sf of exhibition and meeting space.

Sports Tournaments

The Greater Wichita Area Sports Commission is a not for profit organization formed in 1997. The Sports Commission was developed to improve the quality of life and the economy of Wichita through sports, as well as provide support to existing events and organizations in the community.

Their goal is to showcase the community by making the Wichita area a Midwestern hub for sporting events and activities. Six staff members and Board of Directors operate the commission.

Notable Information

The City has plans to improve the downtown area and create a 420-acre park with a 215-acre lake with a beach. The project, Project Downtown: The Master Plan for Wichita, focuses on key areas of the downtown, and has several goals:

- Connect and maximize the potential of areas including Old Town, INTRUST Bank Arena and the River Corridor
- Build upon previous downtown plan
- Provide specific action-oriented development strategies, including implementation plans define the vision for Downtown
- The initiatives will be based upon economic analysis and realities and the plan will maximize private sector investment and return on public sector investment
- The plan will further solidify the identity of the city and community
- The plan is intended to lead to the following outcomes:
- Assist the community in retaining young people, families and jobs
- Increase in tourism
- Grow existing tax base revenues;
- Make Wichita competitive in regional, national and global markets

3.2 Joplin + Competitive Markets

COMPETITIVE MARKETS FACILITIES + SERVICES COMPARISON

	Joplin, MO	Branson, MO	Cape Girardeau, MO	Springfield, MO	Bentonville, AR	Wichita, KS
Visitor Center	1	4	2	4	1	4
Conference/Convention Center(s)	0	4	4	2	0	4
Outdoor Sports Tournament Facility	4	4	4	4	4	4
Indoor Sports Tournament Facility	0	4	4	4	0	4
Performing Arts Center	1 (MSSU)	4	3	4	4	4
Concert Venue	3	4	4	4	4	4
Indoor Recreation Center (with pool)	0	4	2	4	4	4
Museum, Zoo or Exhibition Space	1	4	3	4	4	4
Pedestrian Retail Environment(s)	4	4	4	4	4	4
Sidewalks + Pleasing Streetscapes in Commercial Areas	3	4	4	4	4	4
Lodging (within 10-miles or less driving distance to amenities)	4	4	4	4	4	4
Regional or Local Public Transit Service (30-minute frequency)	0	0	0	4	0	3
In-Town Shuttle/Trolley Service to Tourism Destinations	0	3	4	0	0	2
Regional Airport	2	2	0	4	0	4
Public Parking Facilities	4	4	4	4	4	4
Regional Bike Trail System	0	1	3	0	4	4

Rating System

0 = Does not have facility or service
1 = Facility in poor condition/small or service severely lacking
2 = Facility in fair condition/size or service is adequate
3 = Facility in good condition/size or service is good
4 = Excellent facility or service

4. Recommendations

Joplin Independent Tourism Study

4. Recommendations



The Joplin History & Mineral Museum has one of the world's most exceptional collections of minerals found in the Tri-State Mining District.

STRATEGIC PRIORITIES

- Improve visitor experiences
- Increase number of visitors
- Capture visitor spending
- Emphasize results-driven tourism marketing

4. Recommendations

STRATEGIC PRIORITIES

Improve visitor experiences in Joplin

Increase the number of visitors to Joplin

Capture more visitor spending

Emphasize results-driven tourism marketing

For tourism to be a substantial economic driver, multiple agencies, organizations and business must work in a coordinated, collaborative manner toward a common goal. Tourism is dynamic and successful tourism and hospitality development is focused on creating a solid and comprehensive business plan, used to manage the benefits and challenges of a tourism economics.

The recommendations made in this Tourism Independent Study take into consideration that revenue, funding sources and dollars are limited. Recommendations are focused on how to best use limited funding to produce the greatest annual return on investment across multiple business sectors.



The Red Onion Cafe has been open since 1995 and is located in a 100-year old building in historic downtown Joplin.

4. Recommendations: Attractions and Facilities



Joplin Convention & Trade Center closed in February 2018

4.1 DEVELOP A CONFERENCE CENTER WITH HOTEL

- Biggest return on investment of any proposed facility
- Reputation of unsuitable facilities has led to meeting planners not inquiring
- No facilities to accommodate business, trade shows, trade meetings, special events, or state association meetings
- Competitive market is creating and/or expanding conference facilities
- Large industries and educational institutions are likely users and potential partners

4. Recommendations: Attractions and Facilities



Rendering of new Cape Girardeau Drury Conference Center & Hotel
www.semissourian.com/story/2241400.html

4.1 DEVELOP A CONFERENCE CENTER WITH HOTEL

- Conference center should accommodate groups up to 2,500 and include multi-use exhibit space, breakout rooms and the newest technology
- This is about half the size of the Branson facility, but larger than the new Cape Girardeau conference center
- A hotel incorporated or adjacent to the conference center is expected by event/ conference planners
- All hotels will benefit from lodging needs of conference attendees

4. Recommendations



4.1 DEVELOP A CONFERENCE CENTER WITH HOTEL

Convention centers, events and meeting spaces draw visitors to cities and towns to attend a variety of types and sizes of conferences, conventions, special events and meetings. These visitors stay in local hotels and patronize local restaurants and retail establishments and may attend other events or attractions during their stay. There are also indirect benefits of hosting conventions gathering experts and creatives that can lead to long-term economic development opportunities.

Existing Offerings

Joplin has 23 hotels with nearly 2,000 rooms providing a supply of approximately 640,000 room-nights. The lack of a multi-purpose conference center to attract group business is a deficiency in visitor generation.

The CVB collects information about the reasons Joplin was not selected for events they proposed to host, were approached to host or where unqualified to host due to the lacking facilities. In 2016 and 2017 the total number of potential hotel room nights lost due to inadequate facilities was approximately 8,900 for 11,270 attendees. Meeting and event planners are seeking space that is adaptable to a range of group sizes, larger spaces than available in Joplin, and lodging associated with the convention space. Joplin is known for not having a suitable conference or convention center, so many meetings planners do not inquire about potential conference, meetings or events.

The Joplin Convention and Trade Center closed in February 2018. This approximately 30,000 square foot space was privately owned and operated by John Q. Hammons Hotel Management, LLC. The Convention and Trade Center was primarily used by expo and trade shows. The last update to the venue was in the late 1970s/early 1980s.

With the closure of the Joplin Convention and Trade Center there are no facilities in Joplin to accommodate business, trade or state association meetings, trade shows, or special event. There are 11 standalone meeting spaces, averaging 6,227 square feet in locations such as the arts center, university center, coffee shops, Joplin Public Library, various hotels, Elks Club, and Wildcat Glades Conservation Center. None of the spaces are large enough to host conferences of note.

Competitive Market

Many of the cities within Joplin's competitive market are seeking to create or expand convention facilities and attractions. Examples include:

- Cape Girardeau opened the Drury Plaza Hotel and Conference Center in 2017. It is a 14,000 square foot conference center and 160 guest room hotel.
- Springfield has a downtown campus style approach to hosting conventions with the University Plaza Hotel and Conference Center located next to the Springfield Expo Center, White River Conference Center and several area hotels. The event center is adding another banquet hall, rooftop bar and other additions through a renovation project. 500 hotel rooms are in the works with four new hotels underway. The City is seeking to address the lack of large event space that puts the city at a disadvantage in competing for conventions.
- Bentonville, Arkansas completed a feasibility study for a convention center in 2015 that suggested the area can support a 254,100 multi-use space. Since then, the City has been actively pursuing the creation of a convention center and hotel downtown.
- Witchita Century II Performing Arts and Convention Center provides 200,000 square feet of exhibition and meeting space.
- Branson/Lakes Area CVB marketing plan focuses on increasing the number of meetings and conventions. The Branson Convention Center opened in 2007 and provides 220,000 square feet of usable space.

Opportunities

Large industries and five higher educational institutions located in the Joplin region are likely users and potential partners for a conference center. Freeman Healthcare, Mercy Healthcare, Kansas City University of Medicine and Biosciences, Eagle Picher energy storage, Tamko building products, and General Mills are some examples of the largest employers that have potential to become users. In the past, Joplin experienced a strong religious conference market, but that market outgrew Joplin's facilities.

A future conference center should be designed with the size and amenities to accommodate these likely potential conference groups and to be competitive with other cities in the region.

Building a **conference center in Joplin** *would be a* **game changer.**



Rendering of new Cape Girardeau Drury Conference Center & Hotel; *www.semissourian.com/story/2241400.html*



Branson Convention Center + Hotel; *www.flickr.com/photos/bransonmo/15572316398*

Conference Center Facilities

The creation of a conference center with hotel would make the largest impact on increasing the number of visitors to Joplin and visitor expenditures. Conference centers are the single most consistent facilities that bring in overnight visitors that will pay higher average daily rate for hotel rooms. They also generate food and beverage support through catering and restaurants.

A couple of developers have reportedly shown interest in creating a hotel/conference space combination within Joplin.

The conference center should accommodate groups up to 2,500 attendees. This size is about half the size of the facility in Branson but larger than the new conference center in Cape Girardeau.

Accommodations

Adding a conference center with attached hotel that includes a ballroom, breakout room(s) and exhibit hall that can accommodate multiple uses is the best solution for Joplin. Competitive communities have varying degrees of these facilities depending on how much business they can acquire.

While groups inquire about coming to Joplin for meetings and events, they often want to stay in the same facility that their meetings or events are being held. Conference groups will need more room than what is offered adjacent to the conference center. As a result, all hotels will benefit. Currently, the CVB has to say, "We're sorry, but we don't have an adequate facility for your group to meet."

Multi-use Event Space

The conference hall could have multi-use space incorporated into the design at an incremental cost. For example, higher ceilings and a removable wood floor would allow for sporting event use. While these sorts of design changes add to the cost of the building, it is considerably less costly than creating a separate indoor sports tournament space.

4. Recommendations: Attractions and Facilities

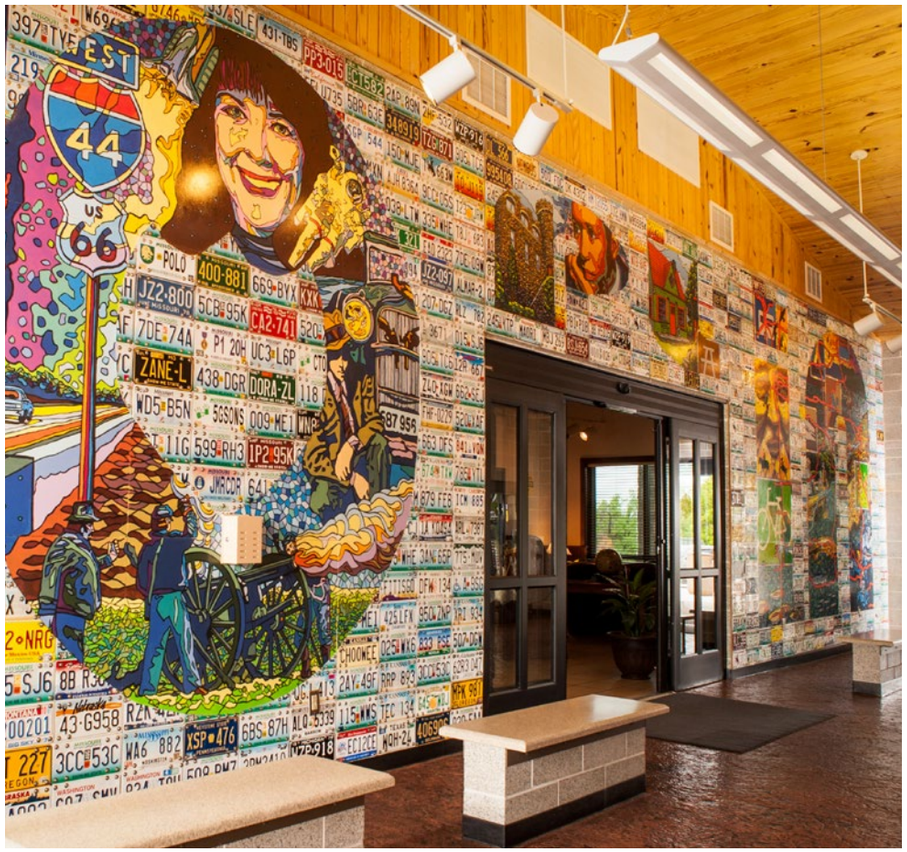


Existing Joplin Visitor Center

4.2 IMPROVE VISITOR CENTERS

- Visitor centers need to be located where visitors make decisions.
- For Joplin, two visitor center locations are recommended:
  - » Near hotels - most likely Range Line Road
  - » Downtown - with high visibility
- Visitor Center facilities should incorporate:
  - » Creative signage
  - » High quality aesthetics
  - » Interactive & experiential displays
  - » Conveniences visitors expect

4. Recommendations



Mural inside the I-44 Welcome Center tells a story about the region. Matthew Dehaemers' mural depicts automobile culture, history of the area and its outdoor treasures.



The interior of the CVB visitor center downtown is lacking interactive displays and more engaging information to help visitors learn about Joplin attractions.

4.2 IMPROVE VISITOR CENTERS

Visitor centers should be located where visitors are and where they are having to make decisions about their visit.

The Missouri Division of Tourism Joplin Welcome Center on I-44, seven miles west of the city at exit 1, provides racks of information for attractions throughout the state. It does not substitute for a Joplin-focused Visitor Center. Improvements are needed to the aesthetics and displays as they do not convey the character of Joplin. Informational materials and displays inside and outside the building as well as signs are needed direct people to visit other Joplin attractions and the downtown. A new visitor center on Range Line Road at exit 8 would be a good location to capture visitors because it is near the hub of lodging and a primary rest stop location for travelers.

The second visitor center should be located downtown in a different format than the current Joplin CVB offices located in City Hall. The City Hall location is not obvious to visitors and is disconnected from attractions. The Joplin CVB office contains more of the art displays, memorabilia, visitor informational guides, and personal contacts with staff that visitors are seeking. A future visitor center should also include interactive displays that engage visitors, rather than just provide printed materials.

4. Recommendations: Attractions and Facilities



The downtown area of Joplin, with its historic architecture, is attractive to visitors. Many downtowns in cities and towns throughout the United States have become vacant as commercial centers were built on the edge of town. Joplin has the opportunity to make downtown a vibrant destination.

4.3 ENHANCE DOWNTOWN

- Encourage hotel development downtown
- Support and promote development of Empire Market and food culture
- Support development of Arts & Entertainment Center
- Support other efforts of Connect2Culture and the broader art community relating facilities and programs downtown
- Host a variety of special events downtown
- Promote downtown as a location for dining, shopping and culture
- Continue Main Street and downtown core improvements

4. Recommendations





Street trees and wide sidewalks create a pleasant pedestrian atmosphere on Main Street in downtown Joplin.



Spiva Park provides an area for people to gather, cool off and take in a little bit of Joplin's history while passing by the Miner Statue and fountain.

4.3 ENHANCE DOWNTOWN

Joplin's downtown is special. Many other communities have lost their downtown vibrancy due to development on the outskirts drawing away business. Joplin should keep what it has going already downtown and make it even more vibrant, activate it at all times of the year. Ten years ago Joplin downtown buildings were approximately 70% vacant and today they are reportedly closer to 7% vacant. Joplin has understood that investing in improvements to downtown, keeping up its appearance, and hosting events provides great benefits to the entire community. Continuing Main Street and downtown core improvements will enhance future tourism opportunities. These investments attract visitors and encourage them to shop, dine and seek entertainment in the downtown.

The current location of hotels near the highway is ideal for most pass-through visitors, however, some visitors seek out accommodations in downtown districts for their attractive and comfortable pedestrian experience and easy access to entertainment, food, and businesses. Having at least one hotel downtown would add to the vibrancy and patronage of businesses in this location. Bentonville, Arkansas is an example of a location that made strategic investments in its downtown in consideration that this is the location that makes a first impression on visitors and expresses the entire community identity. Improvements to the Bentonville town square and redevelopment of the Arts and Market District has led to the development of hotels in their downtown as well as attracting a potential for a convention center. As an economic development

4. Recommendations





Joplin Empire Market is intended to serve as an opportunity for a variety of entrepreneurial startups as well as being a regional shopping destination.

opportunity, Joplin should market and promote locations in the downtown as a targeted area for hotel development.

Many groups are invested in downtown, including Connect2Culture, the Joplin Downtown Alliance, and Missouri Southern. New developments are on the way - one of the most exciting for tourism being the Joplin Empire Market project. The Empire Market project includes the conversion of the Empire Electric building on 4th Street to a four-seasons market with interior and pavilion space to be used as a festival and farmers market. Developing this to its fullest potential will create an amenity that will regularly draw people downtown and builds off an emerging interest in celebrating local foods.



Joplin Empire Market Master Plan, located between 4th and 3rd streets downtown.

Joplin is already a center for special events, arts, entertainment and dining. The City has future opportunities to enhance the downtown and promote it as a collection of attractions. Encouraging density, more store fronts lining Main Street, and attractions to locate in the downtown (such as the History and Mineral Museum) will continue to enhance its appeal.
Signs along major roadways to direct travelers to the downtown and Main Street are needed. Better signage is needed along I-44 to direct people to Main Street and downtown.

4. Recommendations: Attractions and Facilities



Bonnie & Clyde exhibit at the History Museum

Joplin has many assets that could be enhanced to attract more visitors to Joplin and provide enough activities for them to stay several days.

4.4 OTHER EXISTING FACILITIES AND ATTRACTIONS ENHANCEMENTS

- Move the History & Mineral Museum downtown. Design exhibits to be modern and more sophisticated
- Expand local and regional bike trails/routes
- Continue to operate Wildcat Glades Conservation Center

4. Recommendations

The dispersed location of many attractions in Joplin requires additional efforts to direct visitors to more than one destination.



Wildcat Glades Conservation Center recently lost its participation from Audubon, but the natural attractions, trails, facilities, and educational opportunities continue to draw visitors.

4.4 OTHER EXISTING FACILITIES + ATTRACTIONS ENHANCEMENTS

Joplin has a fascinating history. This story needs to be told in the places visitors come to see or places they should be discovering.

Joplin History and Mineral Museum

The museum collection includes a Smithsonian level geological collection and there is reportedly potential for a traveling Smithsonian collection to complement current offerings. If the facilities and programs to host these elements were enhanced, it could be a destination draw.

Moving the Joplin History and Mineral Museum downtown, modernizing the exhibits and providing interactive options would be a good step in the right direction.

Local and Regional Trails

The beginnings of great local and regional bike trails exist in Joplin. Over 50 miles of off-road bicycle and pedestrian facilities include multi-use paths, trails, and sidewalks are located throughout the Joplin area. While some paths are adjacent to major roadways, most off-road paths are in parks or components of a larger trail system.

The creation of high quality trails, building connections between Joplin and regional attractions is a way of the future - people are looking for these more and more as part of their travel experience. Joplin is already capitalizing on this trend by hosting a number of race, marathon, triathlon, and cycling events. With improved infrastructure for routes Joplin would be better suited for such activities.

An additional 11.4 miles of paths are considered committed projects that are in the process of implementation (i.e. funding allocation, design, construction). The Joplin Area Bicycle and Pedestrian Transportation Plan (currently under development) includes a vision for a potential Long-Term Loop of on-street bicycle lanes that circle the city and link up the existing and proposed bicycle network. Completing these planned routes with a focus on creating a quality experience for visitors, along with promotion of the regional recreation offerings and events will greatly enhance what Joplin has to offer. It would also keep Joplin competitive with other cities in the region that attract visitors to their trail systems.

Wildcat Glades Conservation Center

Wildcat Glades Conservation Center is both an amenity for the community, as well as a regional draw for nature enthusiasts and a national draw for bird enthusiasts. In addition, the rareness of species and special conditions of the site make this a destination. The impact on visitation with the recent loss of Audubon's participation is unclear but will need to be addressed.

Minor Attraction Recommendations

While all existing visitor attractions promoted by Joplin were evaluated, many of them did not warrant prioritizing major improvements at this time. Grand Falls, for example, is a scenic natural setting and location that local families enjoy playing in the water. However, the location is a challenge for visitors to navigate and it lacks infrastructure needed for a visitor attraction such as parking, restrooms, etc. While envisioning the transformation of this place into a visitor draw is attractive, the level of investment and requirement to address water quality safety makes this a less desirable location to direct efforts.

Route 66 should continue to be marketed and would be enhanced with sign improvements and events as referenced under the visitor experience recommendations, but investing in facilities for Route 66 does not appear to have a high pay-off in attracting new visitors or capturing additional visitor dollars.

4. Recommendations: Attractions and Facilities



Joplin hosts a variety of regional sports tournaments.

4.5 CONSIDERATIONS FOR AN INDOOR SPORTS TOURNAMENT FACILITY

- Joplin has limited opportunities to attract sports tournaments in winter months
- It is unclear what type of sports tournaments JSA desires to focus on for a new multi-purpose facility
- Competitive market research indicates the economics and ROI of a multi-use facility are challenging to achieve
- Parks & Rec facility upsized to host tournaments - using city funding source is a challenge to justify
- Tournament focused facility has many periods of time without use
- JSA does not track turn-down data in a way that informs a conclusion about demand
- Conference Center exhibit hall space could be designed to accommodate some indoor sports tournaments

4. Recommendations



Creating an entire experience - providing supplemental activities along with sporting events helps to capture more visitor dollars.



Joplin hosts a variety of regional sports tournaments and competitions.

4.5 CONSIDERATIONS FOR AN INDOOR SPORTS TOURNAMENT FACILITY

While an indoor sports tournament facility would meet a particular need, a conference center would have a larger tourism impact, if the resources to build it exist or can be raised.

Not enough information has been collected to determine if an indoor sports tournament facility would be a good investment for Joplin. Information that would be beneficial in analyzing further includes the number of days per year the facility would actually be used, ways in which Joplin could recapture revenue dollars and more information to show how an indoor facility could actually be supported over time from dedicated user groups.

Cape Girardeau opened an indoor sports facility in May of 2017 and serves as a strong comparable to understanding the variables to explore in financing, developing and operating a similar facility. The sports facility was a $12 million design-build project. In the first year of operations revenue is expected to cover 80% of operating costs. **Six full-time City Parks and Recreation staff members were hired to operate the 121,000 square foot facility.**

In 2006, the City of Joplin asked Global Entertainment Corporation to review possible location and examine costs for a 5,000 to 5,500 seat multi-purpose events center for hockey, basketball, indoor football and traveling events like concerts and family shows. The study did not include a feasibility, competitive market evaluation, or return on investment evaluation. The conclusion of the study was a $35 - $42 million cost to build such a center.

The design of a conference center to include multi-use event space for indoor sports events is recommended as an avenue to explore how Joplin might offer expanded indoor opportunities with more than a singular purpose.

Another key to providing indoor sports tournament opportunities in the near-term is building relationships with existing facility providers and coordinating schedules and ambitions for hosting events years in advance.

4. Recommendations: Attractions and Facilities



Bull riding at Memorial Hall

4.6 FUTURE OF MEMORIAL HALL

- Designated Landmark status acknowledges the history of the building
  - » Provides an extra level of oversight and local protection - if placed on the National Register of Historic Places, would make it eligible for state and federal tax credits
  - » This does not provide enough funding to make Memorial Hall a functional, modernized building
- Conduct an analysis of the costs of more modern equipment and operations

Joplin could apply to receive National Landmark status for Memorial Hall to become eligible for state and Federal grants/credits.



Memorial Hall, located downtown, was built in 1924 to honor Joplin residents who served in the armed services. www.joplinmo.org/954/Memorial-Hall

4.6 FUTURE OF MEMORIAL HALL

Memorial Hall is a special building with a rich history. The potential to utilize the structure as a facility to meet visitor needs has often been discussed. Renovations to the building would be extremely costly and the City may not be able to find enough funding to modernize and bring it back to its former glory.

Connect2Culture has created a master plan for the Joplin Cultural Park that encompasses the Arts and Entertainment Center (including the Spiva Center for the Arts), a Festival Plaza and Memorial Hall. Shared parking agreements are reportedly underway for approximately 800 parking spaces on properties adjacent to the Arts and Entertainment Center and Memorial Hall. Fundraising is well underway for the Arts and Entertainment Center.

Receiving National Landmark status for Memorial Hall could make it eligible for state and Federal credits/grants, should they become available. Currently, there is not a funding source identified for the extensive renovation project required to make Memorial Hall a functional performing arts and multi-use venue. In addition to renovating the structure, a cost analysis is needed for equipment upgrades to support modern performance uses. This includes an update of lighting, sound, and other stage equipment and infrastructure for operations to continue.

4. Recommendations: Tourism Operations



Downtown Joplin window shopping environment

4.7 RECORD AND TRACK VISITOR DATA

- Hotels, attractions, events need to track visitor numbers (attendees) and provide a monthly report to the CVB

4.8 CONDUCT A VISITOR PROFILE STUDY

- Who is coming to Joplin?
- Why did they come?
- How long are they staying?
- How much did they spend?
- What do they enjoy?
- What do they think is missing?

4. Recommendations



4.7 RECORD + TRACK VISITOR DATA

Recording and tracking visitor numbers will help the Joplin CVB see patterns of visitation and understand how many visitors are going to various attractions and events. The findings of such visitor number tracking will help to inform tourism economic impact calculator assumption.

Only a few of the visitor attractions in Joplin record and report visitor numbers or other information to understand total number of visitors, their choices, spending impact and potential, trends, and opportunities to better serve their interests. A comprehensive system for tracking visitation would aid Joplin in tourism planning. Collecting this data requires the cooperation of all businesses and organizations that benefit from tourism. A recording system that collates information and provides consistency in the data collected and methods is essential.

Possible methods for counting attraction/event visitors include signing a guestbook, kiosk or electronic notepad questionnaire, use of traffic counters or door counters. Use of counters however, does not differentiate between locals and visitors. Hotels and lodging establishments could be asked to track and report the home zip code of every guest checking in.

4.8 CONDUCT A VISITOR PROFILE & SATISFACTION SURVEY

In addition to visitor numbers, collecting visitor information will give the Joplin CVB a foundation of knowledge from which to make a variety of decisions about tourism efforts. A visitor profile study needs to be conducted to make sure Joplin is responding to visitor desires and impressions.

Typically visitor profile surveys are conducted through intercept interviews at a variety of locations and different times of year, online questionnaire or phone calls.

Information Collected in Visitor Profile + Satisfaction Surveys

Methods for data collection of visitor characteristics and satisfaction levels involve conducting surveys to obtain responses through intercept interviews and kiosks located in key visitor locations. Because visitation often varies for communities seasonally, conducting a survey for more than one period a year is advised.

The types of information typically collected in these surveys include the following:

- Demographic Characteristics: age, gender, income, household status, country and zip-code of origin.
- Trip Characteristics: duration (overnight, seasonal resident, day visitor), accommodations, travel companions and party, repeat visitation, and transportation method.
- Trip Activities and Events: purpose of visit, activities participate in, attractions visited and special events.
- Expenditures: expenditures by type, total spending per destination.
- Information: sources used to gather information about the area, information that influenced visitation decision.
- Satisfaction with Experience: satisfaction ratings (friendliness of people, vacation value, amenities/things to do, customer service, accommodations, restaurants), additions desired, preference attributes.

4. Recommendations: Tourism Operations

Before

After



visitcape

Cape Girardeau Area Chamber of Commerce and Visit Cape (Convention & Visitors Bureau) new brand identities compliment each other and provide clarity for visitors.

http://www.rustmedia.com/portfolio/cape-chamber

4.9 COMMUNICATE COMMUNITY IDENTITY AND BRANDING

It is important to engage in an **identity and branding process** for the community - not just relating to tourism.

Residents talk about wanting to move on from the tornado, they **don't know how to describe Joplin to people**, they aren't sure what it has to offer.

Community cohesion and pride is a required foundation for tourism development.

4. Recommendations

Community identity and branding *should be a City led effort with* **significant community input.**

This is not a marketing campaign and slogan. **It represents the community's vision** *and should not change very often.*



Joplin has several murals downtown that begin to create a particular identity for the city. Working with the community to develop a community identity and branding will help tell Joplin's story.

4.9 COMMUNICATE COMMUNITY IDENTITY AND BRANDING

Joplin needs to develop a community identity and branding process, engaging the Joplin community and local businesses. This is an extremely important step to take to get the community on the same page and excited about what Joplin has to offer.

The need for a branding effort became evident in the many interviews with community stakeholders and review of tourism marketing materials. A common theme emerged from stakeholder conversation that they lacked a singular message to explain "Why visit Joplin", "What does it Joplin stand for". Before sharing the brand outside the community you must first have alignment inside the community. Sharing visitor's positive remarks about Joplin could give citizens greater appreciation for how their community is viewed from outside perspectives.

Community identity and branding go beyond tourism - they are about what makes Joplin a true community. They help tell the story of Joplin and allow the community to share this with friends, relatives, potential businesses/talent seeking to locate to Joplin, people who haven't been to Joplin and those who may come to visit. These tools also help community members describe why they live in Joplin. Creating a community identity and related branding are important foundations to build the Joplin story.

The City of Springfield, Missouri is currently undertaking an identity and visioning process (including a vision and values community input process). Part of the purpose of the effort is to help differentiate Springfield but also to identify actions that would cultivate an identity and improve its reputation over time. St. Joseph, Missouri and Mission, Kansas have also undertaken similar community identity development processes.

Joplin should look to a consultant that specializes in conducting community identity and branding processes. The result of their engagement would be a Brand Action Plan identifying strategies and tactics that would favorably change perceptions of Joplin. This effort should be jointly supported by the City of Joplin, the Chamber of Commerce and the CVB.

4. Recommendations: Tourism Operations



The visitor experience can be improved in several ways, which will encourage longer stays and increase likelihood to return.

4.10 ENHANCE VISITOR EXPERIENCES

- Shuttle service from hotels to downtown
- Route 66 bus tour with pre-recorded audio
- Main Street events that draw visitors and encourage extended stays
- Connect2Culture offerings
- Improve the online visitor "Events Calendar"
- Partner with MSSU to create hospitality training (i.e., seminars, summits)
- Brand Implementation Plan (spreading info about Joplin visitation to the hospitality industry)

4. Recommendations

4.10 ENHANCE VISITOR EXPERIENCES

Downtown

In order to activate downtown, visitors need reasons to go there. If they are staying in hotels on Range Line Road, they need a very good reason to make the drive to downtown. Joplin needs to focus on enhancements that will attract visitors to explore what downtown Joplin has to offer. The CVB should explore interests from the Lodging Association in sharing a shuttle service for guests to the downtown, especially for evening events, dining and entertainment.

Route 66

Currently, signage along Route 66 is inconsistent and travelers are challenged to identify the route through the Joplin area. In addition to route signage, wayfinding features would help identify significant features and attractions and enhance the visitor understanding of Route 66 history. Content could be added to a number of existing Route 66 websites and mobile device travel apps to better feature Joplin attractions, history and events. Creating an audio bus tour could also help attract visitors and enhance their experience.



MSSU holds a variety of events throughout the year, some of which are held downtown.

Hosting events on Main Street to celebrate Route 66 has been successful. Enhancing and highlighting such events is another opportunity for Joplin to capture enthusiasts attention without making major infrastructure investments.

Joplin should continue to invest in signage along Route 66. While Route 66 is still iconic in the minds of many, there is not enough of the nostalgic history left in the section that goes through Joplin. While Route 66 should be promoted and is a visitor attraction, it is not the place where Joplin will get its biggest return on investment.

Events

Connect2Culture offers events that improve the visitor experience and are helping to build a sense of community in Joplin. The CVB could be enhanced with greater support for event hosting that has a regional and destination draw.

Events Calendar

There are a number of online event calendars that serve the Joplin area, but they are not connected in a way that best suits visitors seeking information. The Joplin CVB should continue to update the visitor calendar with events that draw people from the region and beyond. CVB funding requires a focus on visitor services, and therefore must not dedicate resources to creating a comprehensive community calendar. Events that are of interest to both visitors and citizens should be linked to the CVB calendar with the ability for visitors to sort by interest areas. Examples include sports events and races, cultural events and performances (Connect2Culture calendar). The CVB, City and organizations that support activities and events should work together to continually update and organize information so it is easy for visitors to navigate.

Hospitality Training

MSSU is an extremely important player in the Joplin community for both residents and visitors. The University brings many visitors to Joplin throughout the year. In addition, it is the ideal entity to provide hospitality educational programs that would have secondary benefits to improving Joplin's hospitality quality.

Brand Implementation Plan

A Community Identity and Branding Plan will identify opportunities to favorably change visitor perceptions, including partnering with the Lodging Association to improve messaging through their hospitality services.

4. Recommendations: Tourism Operations



The Joplin CVBs offices are located in Joplin City Hall

4.11 IMPROVEMENTS TO INSTITUTIONAL STRUCTURE

Joplin Convention and Visitors Bureau

The CVB does a good job with the limited resources that they have:

- Budget
- Lack of convention center
- Lack of signature attraction or event
- Lack of inclusivity of Lodging Association that represents most hotel properties
- Unclear role for event promotion/support
- Online presence and personal hospitality
- Single voice

4. Recommendations: Tourism Operations



Cheerleading Competition in Joplin.

4.11 IMPROVEMENTS TO INSTITUTIONAL STRUCTURE

Joplin Sports Authority

- The goal is for JSA to fill 10,000 room nights annually. This is 1.5% of the supply of approximately 638,000 room-nights ($33,200 in lodging tax revenue)
- In order to make an economic difference, the goal should be no less than 5% (31,900 room-nights)
- Needs to be more collaborative with other organizations, including the CVB

4. Recommendations: Tourism Operations



Homewood Suites by Hilton Joplin Lobby

4.11 IMPROVEMENTS TO INSTITUTIONAL STRUCTURE

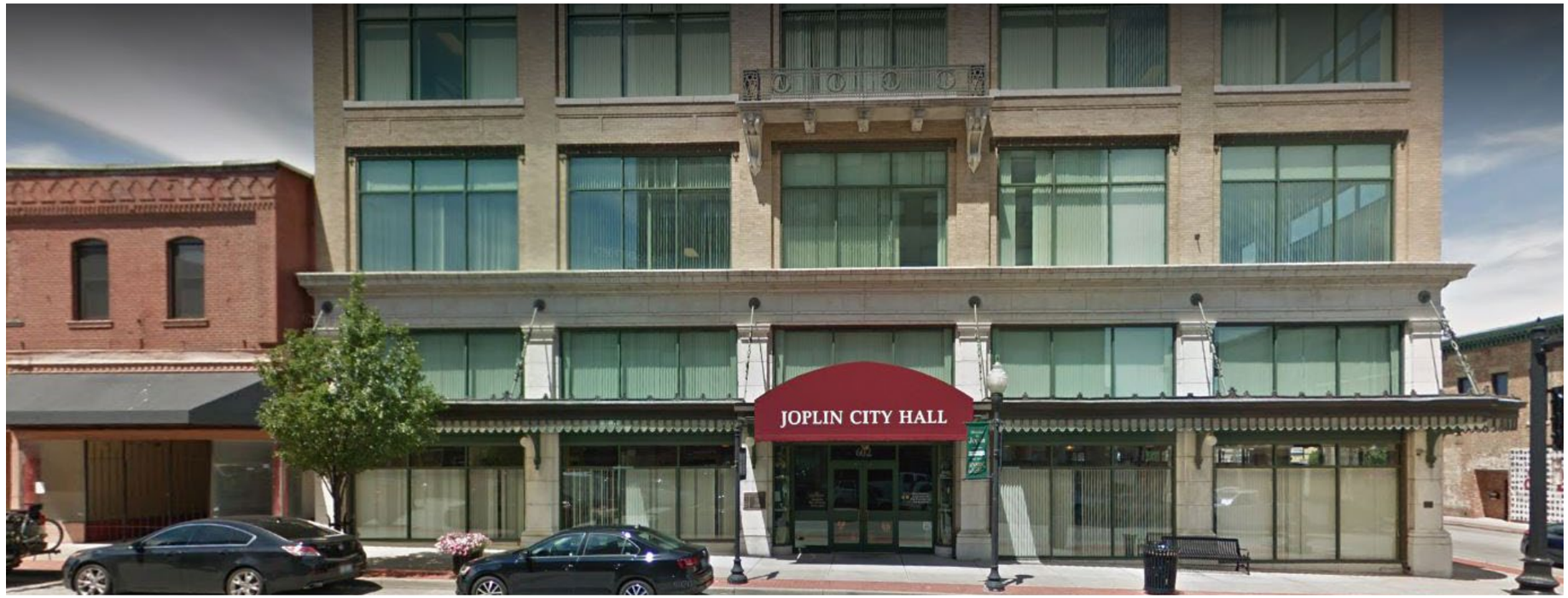
Southwest Missouri Lodging Association

- Joplin should consider creating one lodging association inclusive of all hotel properties as members
- Website should coordinate visitor information about attractions, events etc. with the CVB

4. Recommendations

Partnerships are the key *to tourism institutional structure success.*

All entities involved need to be **"rowing in the same direction."**



The Joplin CVB offices are currently located in Joplin City Hall.

4.11 IMPROVEMENTS TO INSTITUTIONAL STRUCTURE

Achieving a tourism sector that is successful enough to be or become an economic contributor the City is not easy. It requires a shared vision accompanied with collaboration and cooperation of all entities and people involved. It is imperative that these entities in Joplin are "rowing in the same direction." During the process to complete this Tourism Independent Study, the consultant was asked what it takes to achieve this or what can be the catalyst for change.

In a community where the tourism economy is its infancy or where it is desired that it substantially increases, one of three things typically occurs:

- Strong leadership with willing parties and participants - all wanting to and agreeing to work together to accomplish goals
- A shakeup that may include reorganization, redefining roles/responsibilities, creating or eliminating entities to accomplish goals
- A crisis that motivates everyone to work together for a collective and improved future

All entities involved with tourism need to be growing in the same direction. The question is how to get the CVB, JSA, Joplin Downtown Alliance, Lodging Association and Parks Department meeting and communicating on a regular basis with updates? How do you get more heads around potential opportunities to come up with the best ideas and solutions?

Setting up regular meetings and communicating on a more regular basis regarding the different activities of each entity is one of the biggest improvements that could be made to the Joplin tourism/ association infrastructure.

4. Recommendations

Providing the same information across all tourism entities via websites, written content and verbal communication is critical to eliminating visitor confusion.

CVB
The CVB is a critically important organization if Joplin wants tourism to be part of its economy. While this organization is critical, right now it is operating without the C in CVB (conventions). In the future, if the appropriate steps are taken, the CVB should be able to fulfill it's mission more fully.

JSA
Sports is a very important part of Joplin and visitation to Joplin. While sports can be a strong tourism component, the opportunity to perhaps redefine the goals set for JSA could help improve the role of sports related to tourism.

There are at least three options for JSA, which include:

1. Make no change
2. Revise role to be focused only on event management, making marketing and transferring related funding the responsibility of CVB
3. Restructure the sports marketing and management functions within the city so within the CVB there is a Director of Sales, Sports Event Sales, and Convention & Event Services.

With no dedicated revenue stream such as signature events, real estate or teams other than some sponsorship dollars and the percentage of the lodging tax, JSA is not covering its costs or generating a significant ROI. Generating 10,000-12,000 rooms a year (1.5% of the rooms sold annually) is not making an economic difference. The goal should be at least 5% of lodging supply or 31,900 room nights.

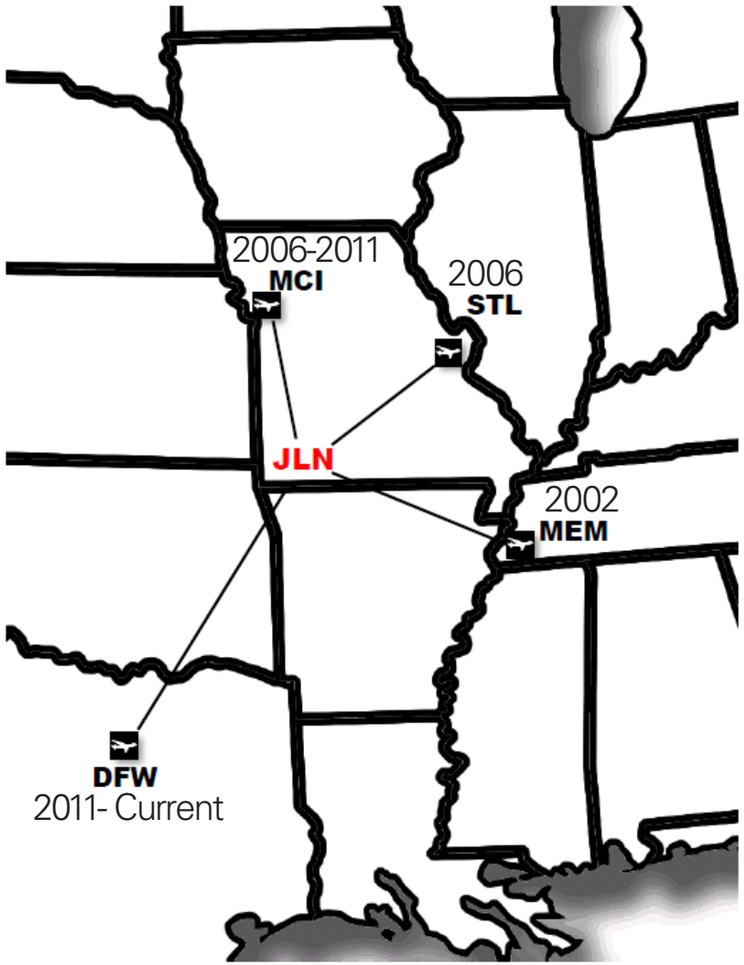
JSA does not market Joplin Sporting venues as much as they function as a Sporting Event Managers, although they currently have two staff members with a sales role title. Sports Marketing would be a better service to grow the demand on the tourism market as a whole rather than spend so much effort, time and money as event managers. A single sports sales manager and a conference/event services person under the CVB Sales Director would serve to grow the market, plus be a more sustainable use of tourism dollars. Nearly all of the cities Joplin competes against to host sporting events include at least one sports marketing and sales position within their CVB, resulting in the event organizers being most familiar with this structure. Joplin would benefit from improved marketing of all its visitor services, attractions, lodging and facilities with the CVB as the primary point of contact for sports marketing.

SW Missouri Lodging Association
In other communities, this type of association is inclusive of all those providing overnight accommodations. This is not the case in Joplin. The group is representative of the most lodge rooms, but does not include all lodging properties. The smaller lodges are currently not represented on the Board or in the membership.

Visitor Information
Currently, the Visit Joplin, JSA and SW Missouri Lodging Association websites all provide different information to potential visitors. This does not serve Joplin or its potential visitors well.

Eliminating visitor confusion regarding information about Joplin is important. Regardless of which website they start with, visitors should either get the same information on each site or be directed to a location with the same information.

4. Recommendations: Other Items of Importance



Historic and Current Air Travel Routes to Joplin

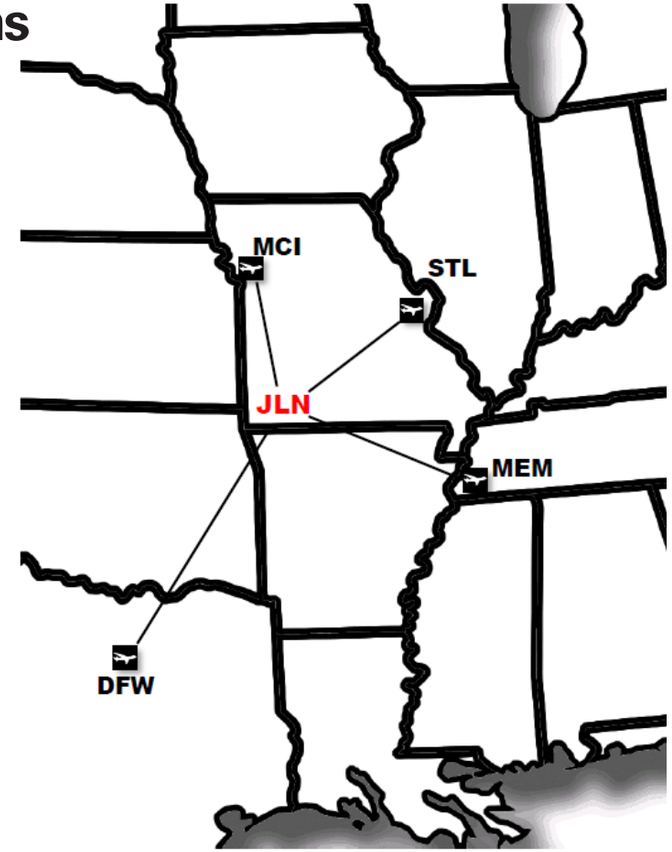
4.12 IMPROVEMENTS TO AIR TRAVEL

- Continue to work to attract additional direct airline service

4.13 ENHANCING MOTORCOACH TRAVEL

- Capitalize on the motorcoach marketing
- Create multi-day itinerary to increase room-nights and market to tour operators

4. Recommendations



Historic and current air travel routes to Joplin remain relatively regional.



A Route 66 mural downtown depicting the freedom of the open road.

4.12 AIR TRAVEL

Joplin has a regional airport that offers two daily flights to and from Dallas/Fort Worth (DFW). A key to increasing visitation is attracting more direct flights to Joplin. The City and CVB should continue to do this for both business and leisure travelers.

4.13 MOTORCOACH TRAVEL

The Joplin CVB should focus on ways to market multi-day itineraries to tour operators in order to get buses to stay overnight in Joplin rather than cities on either end of motorcoach trips.

Joplin serves a total of 3,946 motorcoach group tourist equivalent people on day trips, and an additional 16,369 on overnight stays, for a total of 20,315 group tour visitors. Approximately 580 equivalent motorcoaches visited Joplin in 2016.

- Hotels in Joplin provide group motorcoach tourists with an estimated 21,863 room nights annually
- Overall sales in Joplin, Missouri coming from motorcoach tourists totaled $11,527,300

4. Other Items of Importance



Missouri Division of Tourism Joplin Welcome Center

4.13 FUNDING

- Undertake efforts to renew the Parks and Stormwater sales tax in 2022
- Increase Lodging Tax to 6% to support capital investments in tourism facilities
- Consider Restaurant Tax – usually not easy to get passed. But could provide significant revenue for visitor-related services and facilities
- Adopt an ordinance to require informal tourist accommodations, such as Airbnb and VRBO rentals, to pay Lodgers' Tax.

4. Recommendations

Joplin should focus on **funding projects that increase the capture of visitor dollars.**



Conference business has been a boon to the Joplin economy in the past. It can become a stronger contributor to the Joplin economy if an adequate facility is built to accommodate conferences as well as a variety of other uses over time.

4.13 FUNDING

Projects that increase the number of visitors to Joplin and, in particular, increase the capture of visitor dollars, should seek partnerships between public and private sectors and institutions. This best leverages investments and there are successful models in many communities, including some of those researched as part this study.

Joplin should do the following:

- Renew the Parks + Stormwater Sales Tax
- Increase the Lodging Tax - this increase should be earmarked for a tourism facility, i.e. a Conference Center, that will generate return on investment (capital cost).
- Put an ordinance in place that requires third-party short term rentals (e.g. Airbnb, VRBO) to collect and pay lodging tax

While a restaurant tax is an option that has been discussed, and several Missouri communities implement this, it would be charged to residents as well as visitors. Having everyone pay for something intended to improve tourism may not be the best option.

A progressive model of phased funding for capital improvements is the recommended approach for use of limited funds, only taking on new projects once top priorities are completed.


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JOPLIN

5. Implementation Next Steps

Joplin Independent Tourism Study

5. Implementation Next Steps

STRATEGIC PRIORITIES



Improve visitor experiences in Joplin



Increase the number of visitors to Joplin



Capture more visitor spending



Emphasize results-driven tourism marketing

NEXT STEPS

- CVB Board should decide which recommendations are priorities and discuss with City Council
- Collect visitor data
- Undertake identity and branding study
- Increase lodging tax for new conference facility

5. Implementation Next Steps



Recommendations are the starting point, but ***implementation*** *brings them to life.*

IMPLEMENTATION NEXT STEPS

It is recommended that the first step for the CVB Board is to discuss and decide which of the recommendations they see as priorities and take these to City Council for their recommendation.

Additionally, the CVB should:

- Start collecting visitor data
- Undertake Identity and Branding study (with the City as lead or in partnership with the City)
- Work on increasing lodging tax, ear-marked for conference center
- Use the Tourism Study as a roadmap for future decision-making

STRATEGIC PRIORITIES



Improve visitor experiences in Joplin



Increase the number of visitors to Joplin



Capture more visitor spending



Emphasize results-driven tourism marketing

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