

Brand Report Summary 2007

City of Fort Collins
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Fort Collins, Where Renewal is a Way of Life

Thank you for your interest in the research and outcomes of the recent brand initiative for the community of Fort Collins. The following information is from North Star Destination Strategies and serves as a tool for businesses and community groups to help define their marketing audiences and better understand the creative outcomes of the brand process. While the creative pieces include messaging, bold image selection and a fresh logo, we are unable to give access to the logo at this time as it is property of the City's Communications Office.

Enjoy the results of a year worth of surveys, interviews, and data collection.

Through the Community BrandPrint process, North Star Destination Strategies determined Fort Collins's most relevant and distinct promise. From that promise, they created a positioning philosophy that generates a brand identity in the minds of residents, visitors, and economic development entities. North Star then developed powerful brand-building ideas and effective communication strategies, all of which reinforce the positioning and ensure brand equity and growth.

Research

The goal of this stage is to better understand perceptions of the following groups regarding Fort Collins:

- Community stakeholders (as a place to live, work and play)
- Residents (as a place to live)
- Past and current visitors (as a tourism destination)
- Businesses (as a place to open shop and grow)
- Site selectors and tour operators (as a place to do business)

Research also looked at:

- Primary cities of origin for inquiries about and visitors to Fort Collins
- Demographic and psychographic information about visitors and residents.

Perceptions/Insights

FORT COLLINS STAKEHOLDERS SAY:

From the Stakeholder Vision Survey

- *Adjectives to describe Fort Collins:* Friendly, pretty, fun, progressive, clean, educated, healthy, active, college town
- *Attracts visitors:* CSU, outdoor recreation, Old Town
- *Attracts businesses:* Educated workforce, school system, quality of life
- *Attracts residents:* Schools, quality of life, recreation
- *Greatest asset:* CSU
- *Greatest challenges:* Maintaining the tax base, managing growth
- *Greatest opportunities:* High-paying jobs, quality development, the arts, Old Town.

FORT COLLINS RESIDENTS SAY:

Top responses from the Online Community Survey

- Fort Collins is best described as healthy/active (38%)
- Greatest asset is natural beauty [mountains, rivers, parks] (42%)
- Visitors are attracted by Colorado State University (43%)
- Businesses are attracted by the quality of the community (52%)
- Residents are attracted by the community values (27%)
- People who have never been to Fort Collins think it is friendly/inviting (28%)
- Outsiders are prevented from learning more about Fort Collins due to overshadowing by Denver and Boulder (37%)
- The biggest opportunities for employment growth are in biosciences (22%)
- Fort Collins aspires to be a leader in Northern Colorado (47%)
- The excellent quality of life (60%) makes Fort Collins a unique Colorado city.

**FORT COLLINS VISITORS/PROSPECTIVE VISITORS SAY:
From the Consumer Awareness and Perception Study**

Adjectives to describe Fort Collins: Beautiful, friendly

Top of mind perception of Fort Collins: A college town; a community with outdoor activities, the mountains, and microbreweries

Highest ranked attributes: Appearance of the city (4.03) and a city committed to the community (3.74) [On a scale of 1-5]

Thoughts regarding the abundance of microbreweries:

- Fort Collins is viewed as the microbrewery capital of Colorado (along with Golden, Colorado)
- Suggests that the community likes beer
- Viewed as an employment opportunity
- Associated with a young crowd, or yuppies

Thoughts regarding the emphasis on alternative energy:

- A community that emphasizes alternative energy would have: Clean air,
- clean water, a public transportation system running on alternative energy
- and be environmentally conscious

49% of respondents had visited in the past 3 years:

- Most visited on daytrips, most (35%) for leisure purposes.

**STATE TOURISM OFFICIALS SAY:
From the Perception Study**

- *Seen as:* A charming town with great shopping, restaurants and microbreweries
- *Primary challenge:* Seen as a college town versus a destination
- *Suggestions:* Attract visitors from Wyoming on I-25, encourage people to travel to Rocky Mountain National Park through Fort Collins (versus Loveland).

COLORADO TOURISM PROFESSIONALS SAY:

- *Seen as:* A cultural college town with great bike trails, brewpubs and unique downtown shopping
- *Tourism assets:* Breweries, Old Town (largely undiscovered attraction)
- *Primary challenges:* Local attractions are spread out and hard to find, lack of awareness of a reason to visit/things to do, perception that Fort Collins is a college town and doesn't offer an authentic Colorado experience
- *Suggestions:* More events, downtown entertainment and signage (for trails and breweries on I-25); better marketing of hiking/biking trails.

GROUP TOUR LEADERS SAY:

- *Seen as:* The home of CSU, good restaurants/breweries and Poudre Canyon
- *Tourism assets:* Bike trails, Old Town
- *Visitation drivers:* Conferences and education programs for CSU; outdoor activities for young actives; sightseeing for seniors on their way to Rocky Mountain National Park, Denver or Cheyenne
- *Primary challenge:* Not seen as a destination
- *Suggestions:* Emphasize the river, market trail offerings, market regionally.

MEETING PLANNERS SAY:

- *Seen as:* A laid-back, friendly, college town with great restaurants and breweries, but very spread out and not easily accessible
- *Assets:* One of the top locations in Colorado for meetings because it is an affordable, small, clean town with personal service and many options for dining/shopping
- *Primary challenge:* No convention center, lack of quality hotels/transportation around town.

STATE ECONOMIC DEVELOPMENT OFFICIALS SAY:

- *Seen as:* Relaxing and inviting, great downtown and outdoor recreation, “the definition of a great quality of life” (clean air, great schools, great nightlife and proximity to Denver airport)
- *Assets:* CSU, quality workforce, great business environment
- *Primary challenge:* Lack of awareness among site selectors, perception that the city is far away from everything and becoming landlocked
- *Suggestions:* Tap into value-added agriculture, pursue high-tech companies.

LOCAL BUSINESS OWNERS SAY:

- *Seen as:* Family-oriented, offers great opportunities for personal and professional growth, good school systems, advantageous central location
- *Assets:* The people, incredibly intelligent workforce, collaborative environment, progressive and friendly city
- *Primary challenges:* No-growth policies, red tape.

BUSINESSES THAT “GOT AWAY” SAY:

- *Primary reason for relocation:* More strategic locations elsewhere due to the market and/or vendor accessibility
- *Primary challenge:* Too much red tape.

NORTHERN COLORADO MULTICULTURAL CORPORATION SAYS:

- *Seen as:* An accepting community that values its differences (but is lacking in diversity), a great place to live and raise a family
- *Suggestions:* Showcase efforts to support diverse groups and businesses, make minority groups feel welcome, work to become a role model for other cities.

INQUIRY & VISITOR MARKETS SHOW:

From the Inquiry and Visitor Origin Studies

These results were compiled after researching the Fort Collins Convention and Visitor's Bureau's inquiry records, and five different lodging property's visitor addresses.

- Top Inquiry Markets: Denver-Aurora, CO (8.5%), New York-No N.J.-LI (3.6%), Chicago-Naperville, IL (3.0%)
- Top Visitor Markets: Denver-Aurora, CO (11.7%), Colorado Springs, CO (4.6%), Loveland, CO (2.8%).

Top Inquiry States:

Colorado (15%), Texas (8.5%), Illinois (5.8%)

Top Visitor States:

Colorado (27.2%), California (9.4%), Texas (5.9%)

North Star also advised that based on deeper studies, not included in this report, Fort Collins has great opportunities for gaining visitation market shares from residents in Loveland; Boulder; Minneapolis, Minnesota; and Boston, Massachusetts. These would be considered targets because their residents are demographically and psychographically similar to our core visitors.

Tapestry Study Report Findings

For over 30 years, companies, agencies, and organizations have used segmentation to divide and group their markets to more precisely target their best customers and prospects. Segmentation explains customer diversity, simplifies marketing campaigns, describes lifestyles and lifestages, and incorporates a wide range of data. The Tapestry system classifies U.S. neighborhoods into 65 market segments.

By understanding who its customers are, more appropriate responses can be formed to address their needs with better messaging, products, and services.

Top Resident Tapestry Clusters

- Up and Coming Families (12%): Second highest growth market and youngest of Tapestry's affluent family markets. Residents are more Gen Xers than baby boomers with a median age of 32. Most are married couples with children at the beginning of their careers. Purchase basics in household furniture and yard care products, enjoy fast food, domestic

travel and have little free time.

- College Towns (11%): Most residents are between 18-34 and live in single person or shared households. Education is the key focus of residents (approximately 42% are enrolled in college) and they rank high for part-time employment. Residents prefer ready-made or easy to prepare meals and they frequently dine out at fast food restaurants. They are highly computer and internet savvy, own few appliances, and enjoy a casual and active lifestyle. Leisure time includes concerts, college sports games, movies and bars.

- Metropolitans (7%): Metropolitans favor city living in older neighborhoods populated by singles or childless couples. Residents include both Gen Xers and retirees with a median age of 37.2 and a median HHI of \$55,000. Most are white with some black and Hispanic populations represented. Residents pursue an active, urbane lifestyle and travel frequently. They listen to classical, public, jazz and talk radio and stay civically involved.

In Style 7%

Boomburbs 6%

Exurbanites 6%

Dorms to Diplomas 6%

Suburban Splendor 6%

Enterprising Professionals 6%

Aspiring Young Families 4%

”Other” 29%

Top Visitor Tapestry Clusters

- Boomburbs (8%): Residents enjoy the single life; single persons living alone or with a roommate represent the majority of this market that is quickly maturing and diversifying. With a median HHI of more than \$87,000, these singles are affluent and extremely well-educated. Most hold professional or management positions. Leisure time is spent at concerts, sporting events, shows, and museums. They are health conscious and physically fit.

- Suburban Splendor (8%): Maturing families in growing neighborhoods, median age 40, married with adolescent children. Mostly white, median HHI \$114,000, high labor force participation, 92% own their homes. Free time is devoted to family, travel, self-improvement and investing.

- Exurbanites (6%): Residents live beyond the urban fringe, preferring open space with affluence. Majority are empty nesters but 45% of the married couples still have children at home. Median age is 43, placing residents between college expenses and care of elderly parents. Focus strongly on investing, home and garden, and shop practically at stores like Lands' End, L.L. Bean, Old Navy and Target.

Up and Coming Families 5%

In Style 4%

Sophisticated Squires 4%

Connoisseurs 4%

Metro Renters 4%

Metropolitans 3%

Prosperous Empty Nesters 3%

“Other” 51%

Highlights of Residents Habits

- Buy electronics and home office equipment
- Consider themselves very liberal, health conscious, participate in environmental groups/volunteer activities, donate money to PBS
- Go jogging/golf/skiing/hiking/biking
- Engage in domestic/international travel, go to rock concerts, bars/nightclubs, go to movies, museums, live theater
- Drink wine and premium beer, buy black and white film
- Use the internet for studying, investing, shopping
- Move frequently and rent U-Hauls (students)
- Watch the Golf Channel, VH1, Scrubs, MTV, Comedy Central, The Simpsons, MSNBC, BBC, CNN
- Read airline, bridal, epicurean, business, fashion, sports, travel magazines
- Listen to public, classical, news, alternative radio
- Eat at family restaurants
- Shop at Express, Banana Republic.

Highlights of Visitors Habits

- Own stocks with market value \$75,000+; use Fidelity brokerage firm
- Drink wine and premium beer
- Go to the gym, museums, live theater
- Go skiing, play tennis/golf
- Eat at family restaurants – Cheesecake Factory, Chili's, Outback
- Watch Golf Channel, BBC, HGTV, West Wing, Independent Film Channel,

MSNBC, CNN

- Read airline, epicurean, travel, business/finance magazines; business/finance section of newspaper
- Listen to public, classical, news, talk, sports radio
- Engage in frequent domestic/international travel (business and leisure)
- Use the internet to buy books online; track investments
- Fairly split liberal/conservative; donate money to PBS; participate in several public activities; volunteer for various groups, including environmental efforts.

INSIGHTS (CONCLUSIONS BASED ON RESEARCH)

Fort Collins has everything you would expect from a great Colorado town – outdoors, microbrews, university, vibrant downtown and environmental consciousness. But it's so much more...

- Fort Collins is *the* leader of Northern Colorado, and sets higher standards – as a true leader should.
 - o The “Greenest City” in Colorado (*Denver Post*)
 - o 1 of 4 Sustainable Cities for Best Practices for Renewable Energy (*Sierra Club*)
 - o 3rd city in the U.S. to mandate LEED certification for all city buildings (*U.S. States News*)
 - o 5-Star Award for efforts to reduce global warming and pollution (*ICLEI*)
 - o CSU curing diseases, solving world environmental problems
 - o Microbrew capitol
 - o More than 50 organizations contribute to local arts scene
 - o A “leader in innovation and partnerships” for growth (*CSU regional economist*)
 - o Overflowing with nonprofits
 - o Highly involved in volunteerism for the community and environment (*Tapestry profiling*)
 - o Land conservation and historic preservation are collective priorities
- Fort Collins is genuine and authentic.
 - o Real, friendly, open-minded and down-to-earth people (not extreme liberal hippies with superior attitudes).
 - o Historic Old Town and locally-owned businesses are dominant

(not homogenous big box developments).

o Small businesses and entrepreneurs are supported.

• Fort Collins is approachable and accepting of all kinds.

o Green *and* pro-business

o High-tech *and* agriculture

o Liberal *and* conservative

o Highly educated *and* down to earth

o Work hard *and* play hard

o Families *and* college students

o Arts/culture *and* outdoors

o Healthy/active *and* love beer

o High energy *and* laid-back

o Leaders *and* humble

• Fort Collins is inspiring.

o The arts are celebrated.

o Natural beauty and surroundings are appreciated and preserved.

o Numerous forces are at work to ignite change and progress, providing regional and global environmental, social and agricultural solutions.

o People get involved and volunteer their time towards various causes.

• This is a place where you can renew yourself.

o Re-charge, energize, relax, be creative, get involved, start a business, spend more time with your family, be an individual, learn something new, be a leader, reach your fullest potential.

• In Fort Collins, you can pursue your passions.

o #1 Best Place to Reinvent Your Life (*AARP*)

o #1 Top Retirement Spot (*Where to Retire*)

o #1 Best Place to Live (*Money Magazine*)

o Ranked as one of the best places to live and do business (*Forbes*, *Kiplinger's*, *Men's Journal*)

o #1 town in the U.S. for entrepreneurs

o One of America's Dream Towns (*Outside*)

o One of 18 Perfect Towns (*Outside*)

o 10th Best City to Have it (*All A&E Network*)

o #6 Best Places to Raise Your Family (*Frommer's*)

o 100 Best Communities for Young People (*America's Promise*)

o Governor's Award for Downtown Excellence

o Best Place to Raise a Family (*Reader's Digest*)

• The Fort Collins personality is:

o A leader, authentic, humble, original, down-to-earth, creative, proactive, independent, supportive, adventurous, appreciative, balanced, forward thinking, happy, accepting, inspiring.

In-Market Study Results from North Star's visit June 13-15, 2006

Purpose

The purpose of the In-Market Study is to gain understanding of the perceptions and attitudes of Fort Collins among its residents and experience, first hand, what makes Fort Collins a unique place for businesses, visitors and residents alike.

Methodology

The following summary reflects observations and input received from the North Star Destination Strategies Fort Collins Community BrandPrint In-Market Visit on June 13-15, 2006. This includes stakeholder focus groups, stakeholder one-on-one interviews and local community one-on-one perception interviews.

Results

Ask anyone in Fort Collins what you should do while you're there and they'll point west. The Poudre River, Horsetooth Reservoir and the immediate surrounding areas offer endless options for outdoor recreation – biking, hiking, rafting, kayaking, camping and scenic drives.

They will also point inward towards Old Town, the vibrant epicenter of Fort Collins where you can shop, eat, drink a freshly brewed beer, enjoy an outdoor concert, or simply watch the eclectic mix of people go by.

A constant motif, evident everywhere you look, is bicycles. One can easily travel through town on a bike – and many choose to do so.

When exploring the culture in Fort Collins, a collective consciousness emerges which encompasses the outdoors, the arts, education, environmental concerns and a general appreciation for authenticity (microbrews, local shops/restaurants). As one resident put it, "...this is a happy place with good energy."

While there have been strong anti-growth sentiments, the majority of the community now supports a greater focus on economic development and recognizes its **strengths and priorities** in the following categories: software, hardware, biosciences, clean energy, agri-tech and all things "Uniquely Fort Collins" (restaurants, microbrews, rafting, arts/entertainment). Fort Collins also possesses incomparable brainpower, an excellent education system, a desirable quality of life and vast open space – all important factors when competing for and retaining those companies and jobs that will ensure a diverse and prosperous economy.

Most of the economic growth in Fort Collins has been organic. The city is very supportive of local start-ups, and has been deemed the **#1 town in the U.S. for**

entrepreneurs (per capita). Microbreweries are symbolic of this movement, as are all of the businesses under the “Uniquely Fort Collins” umbrella. Support for these local efforts can be seen around town on signs reading, “Shop Fort Collins First.” High-tech consulting start-ups are also common; former employees of companies like HP and Intel don’t want to leave the area.

With a student population of 25,000, Colorado State University is a dominant backdrop that holds great potential for economic development, if the city can align its industry pursuits to university expertise. CSU’s major initiatives involve positioning the university as a leader in 21st century agriculture. This includes three areas of focus: biosciences (developing vaccines for infectious diseases); environmental sustainability (air, water, soil, energy); and food nutrition for well-being (crops for health).

Regarding immediate competition, Loveland (just to the south) is the home of big box retail and touts itself as the gateway to Rocky Mountain National Park. Boulder gets the ink for being the progressive city, and Denver has the jobs.

Key constituents realize Fort Collins is commonly associated with its microbrews, but unanimously agree the community should be known for more than just beer.

OTHER MAJOR THEMES AND OBSERVATIONS

Assets:

- Old Town
 - o The place to be – always something going on
 - o Has a certain character that’s hard to find
 - o Boutique shopping (not mainstream retail): antiques, outdoor designs, Colorado art, guns and outdoor supplies
 - o Plethora of restaurants
 - o Historic buildings (architecture)
 - o Gathering spot – entertainment/music
 - o All types – from Mohawks to families
 - o Inspiration for parts of Downtown Disney

- Breweries
 - o New Belgium, Odell’s, CooperSmiths, Fort Collins Brewery, Budweiser
 - o Could be considered the microbrew capitol
 - o “CooperSmiths makes you love Fort Collins – brewed beer on the patio”
 - o “New Belgium value system reflects this community” (sustainable, wind powered, bikes, local start-up)
 - o Foam on the Range: local event to help guide locals and visitors to all of the breweries (yet another example of collaboration and support)
 - o Brew Fest (Microbrewery festival)

- Outdoors (Poudre River, Horsetooth Reservoir, trail system, open space)
 - o Definitive part of the culture
 - o Fort Collins values the natural environment
 - o You can go from east to west and north to south on trails
 - o You can do “canyon and culture” (i.e. theatre) in one day
 - o Offers camping, hiking, biking, tubing and rafting
 - o Over 300 days of sunshine (stated by many); great climate
 - o Provides quality of life that attracts employees/residents (Hewlett Packard HR knows this is why people come to Ft. Collins).

- The arts
 - o 7 theater groups, Contemporary Art Museum, galleries downtown, high symphony attendance
 - o People can express themselves here
 - o Eclectic

- Vitality
 - o People bike/walk in the evenings here (not everyone is in a car)
 - o People live well here and take pride in their lives
 - o Great vibe – happy place with good energy

- Clean
 - o Pristine – has not been discovered
 - o Environmental programs for clean energy

- CSU
 - o Key source of intellectual stimulation

Challenges:

- Anti-growth city council members
 - o Community groups are more liberal and somewhat negative about economic development
 - A lot of folks think with open space, trails, revitalized downtown, university, etc. it’s not difficult to attract new business
 - o Community is tired of no-growth policies
 - The “minority” council needs to rethink their approach – Fort Collins needs business

- Cities/counties in Colorado rely heavily on sales tax
 - o Fort Collins used to be the retail leaders in Colorado, but now the sales tax base is eroding (and competing with big box towns like Loveland)

- Recent international retail conference in Vegas

o Fort Collins was perceived as a college town without much purchasing power

Not true! (High tech industry = high incomes in Fort Collins)

o Need to focus on retail strategy – Fort Collins has pushed Big Box away

• Not a lot of property available for new business due to Colorado boom and bust

• Competition

o Loveland: Shopping, touts gateway to RMNP, going to be the epicenter of Northern Colorado, transportation hub

o Denver: Jobs

o Boulder: Goes beyond a college rivalry – Boulder gets the ink; always gets the press as the progressive city. Fort Collins has to fight for positioning and feels like the step child.

Opportunities:

• Fort Collins possesses key drivers for economic development:

1) Quality of life

a. Education system (K-12 system is almost like a private school)

b. Outdoors

c. Weather

d. Arts/culture

e. Breweries

f. Old Town (shopping/restaurants)

2) Brainpower

a. CSU

b. 95% of population has a high school degree

3) High-tech base

a. HP, Intel, Advance Energy

4) Open space

Six clusters define Fort Collins:

1) Software

2) Hardware

3) Bio sciences

a. World-class human/animal sciences

b. Animal sciences is a huge industry (Fort Collins is not currently

capitalizing on it and should)

c. CSU veterinary school is #1 in the country

4) Clean energy

a. Fort Collins could become the clean energy capital

b. Program at university to develop capabilities (labs, solar, biofuels, etc) could attract billions of dollars

c. Sustainability

d. New Belgium is clean energy consumption and zero polluter; only brewery in the U.S. to get all power from wind

e. Schools are LEED certified

f. Green Build program at CSU

g. Engines lab – doing major clean engine work with global implications (will reduce emissions by 70%)

h. Working towards stabilizing energy grids to allow for multiple sources of energy

5) Agri-tech

a. CSU specializes in agrarian sciences

b. Federal government has a repository of every seed-born plant in the world in a facility on campus (to prevent extinction)

6) Uniquely Fort Collins

a. Encompasses restaurants, microbrews, rafting, arts/entertainment

b. Fort Collins is more than beer

• Linking downtown to CSU is currently a major initiative

o Putting in 5,000 residential properties around downtown

o Beet Street Project – arts/entertainment venues/activity downtown, amphitheater by the river

• Beer

o There are only two national microbrews (Sierra Nevada and Sam Adams)

o New Belgium is only four states away from a national microbrew status

o Odell's is expanding

o Fort Collins Brewery

o Fort Collins can be considered the microbrew capitol

o Brewery Tour (Foam on the Range)

• Development of river corridor

o Future development in proximity of the river (not right up to it like in San Antonio)

o Environmental perspective (protecting the river)

o Pushing out Old Town (from an architectural standpoint, design, etc.)

Potential:

- o Could/should be as big as Estes Park (which doesn't have the culture, schools, jobs, etc.)
- o Highway 34 goes to Rocky Mountain National Park – Fort Collins is building more along there
- CSU is the largest conference university in the U.S.
- o Meetings business is strong for those seeking outdoors as part of conference/meeting, big draw for religious groups

- Embracing CSU's priorities – super clusters (21st century agriculture)
 - 1) Infectious diseases
 - a. Not just about developing a vaccine, but about the infrastructure, capabilities, language and culture of the country it's going to effect
 - b. Priority to grow biosciences infrastructure
 - c. Beef traceability (CSU does that work)

 - 2) Environmental sustainability
 - a. Air, water, soil, energy
 - b. #1 atmospheric sciences in the world (does the fastest remote data collection in the world)
 - c. Soils – important for agriculture
 - i. Natural resources ecology lab
 - ii. Research stations on every continent
 - d. Water – public policy work, analysis, etc.
 - e. It's all environmental and contributes to progressive agriculture
 - f. Federal seed repository

 - 3) Food nutrition, health and well-being
 - a. Cancer researchers studying links between food and cancer
 - b. Crops for health – want to be the world experts on scoring food in terms of health benefits

- City's economic development should complement CSU's human talent and technology and capitalize on it
 - o CSU would listen if city wanted to bring in a company that needed these kinds of engineers
 - o CSU is the #2 university for research money (industry can tap into university expertise and intellectual stimulation)

- Creative class
 - o Want to live in a beautiful, cultural, intellectual place

- The major gateway to Fort Collins economic development is rich, startup CEOs
- Most site selectors first interact with Northern Colorado Regional Economic Development
 - Small business incubator (community supports them)
 - o People *want* to be here, they don't have to be here
 - o Even if they lose their job they are going to try to stay
- Fort Collins needs to be able to attract ethnic/international diversity
 - o A black person cannot get a haircut in Fort Collins.

Perception Study

Purpose

The purpose of the Perception Study is to gain an in-depth understanding of the brand perceptions of Fort Collins among various segments of the target audience. What is Fort Collins like as a place for business, tourism, and group meetings?

Methodology

North Star consultants conducted various perception calls to state tourism officials, Colorado tourism professionals, group tour leaders, meeting planners, state economic development officials, local business owners, businesses that “got away” and representatives from the Northern Colorado Multicultural Corporation. Questions were phrased to gather qualitative information. The telephone interviews were conducted with people from lists provided by the Fort Collins Brand Drivers.

Results

State tourism officials:

From a state-level perspective, Fort Collins is a charming town with great shopping, restaurants and microbreweries. Hiking and bike trails were mentioned, although there was confusion as to whether there is a river nearby for rafting or kayaking.

The primary challenge is that Fort Collins is not very well-known and is seen as a college town versus a destination. Suggestions include attracting visitors from Wyoming on I-25, or encouraging people to travel to Rocky Mountain National Park through Fort Collins rather than Loveland.

Colorado tourism professionals:

Colorado tourism professionals describe Fort Collins as a cultural college town with great bike trails, big trees, brewpubs and unique downtown shopping. Breweries were continually cited as a tourism asset, while Old Town was considered to be an undiscovered attraction for visitors.

The biggest perceived challenge for attracting visitors is that Fort Collins is “off the beaten path” and the local attractions (Old Town, breweries) are spread out and hard to find. Another challenge is the lack of awareness of a reason to visit and things to do (such as rafting or kayaking on the Poudre River). The perception also exists that Fort Collins is more like a typical Midwestern college town and doesn’t offer much of a “Colorado experience.”

Suggestions to attract visitors include more events (Bolder Boulder, Kinetics); better marketing of hiking/biking trails; entertainment/performances downtown (similar to Pearl Street); better, more frequent images of downtown; and more signage (trails, breweries, from I-25). Another suggestion was to follow the example of New Belgium’s successful branding efforts.

Group tour leaders:

When asked to describe Fort Collins, tour leaders listed CSU, restaurants, breweries and Poudre Canyon. Bike trails and Old Town are considered primary tourism assets. Conferences and education programs for CSU are the key drivers for visitation, as well as outdoor activities for young actives and sightseeing for seniors on their way to Rocky Mountain National Park, Denver or Cheyenne. A challenge for attracting visitors is that Fort Collins is not seen as a destination.

Suggestions include putting more emphasis on the river through town, marketing trails, and taking advantage of being the most distinguishable city in Northern Colorado. A regional approach would be ideal.

Meeting planners:

Meeting planners describe Fort Collins as a laid-back, friendly college town with great restaurants and breweries, but very spread out and not easily accessible. One planner said that most meetings are held there if it is necessary to keep certain members or stakeholders “happy.” However, it is one of the top locations in Colorado for meetings because it’s a small, clean town with personal service and many options for dining/shopping at the end of the day.

It is also much more affordable than Denver.

A **challenge** for bringing larger meetings to the area is the lack of a convention center and quality hotels. It might also help if transportation were available to bring people around town.

State economic development officials:

From a state perspective, the Fort Collins business environment is considered to be **very unique and diverse**, scattered with high-tech companies and a major emphasis on agriculture. The community itself is described as relaxing and inviting, with a great downtown and outdoor recreation. Fort Collins is the definition of a great quality of life, with clean air, great schools, great nightlife and proximity to DIA. Economic development **assets** include CSU, a quality workforce, higher standard of living and a great business environment. Fort Collins is also highly regarded for its spirit of cooperation and partnerships in the region due to strong leadership.

The primary **challenge** is the perception that the city is far away from everything and that it's becoming landlocked due to open space policies, restricting expansion. Suggestions include tapping into value-added agriculture, while also pursuing high-tech companies. Fort Collins could be the next Silicon Valley, with the infrastructure in place and significant presence of both large and small tech firms.

When compared to Boulder, Fort Collins is considered much more laid-back and business-friendly. More importantly, Fort Collins **embraces growth**. Fort Collins is the perfect example of balance because it's clean, "green" and efficient – but also probusiness.

The reason Boulder is perceived as more "green" is because they say no to business.

Fort Collins also faces the **challenge** of a major lack of awareness. Most site selectors don't even know about it, or where it is. However, this provides a great opportunity and "blank canvas" to establish a favorable identity.

Local business owners:

Business owners in Fort Collins describe the area as family-oriented, with **great opportunities** for personal/professional growth, a great school system and advantageous central location (close to Denver, mountains, etc.)

One interviewee said Fort Collins is the "ultimate place to live."

The **best reason** for doing business in Fort Collins is the people – it's a great think tank, a collaborative environment, progressive, friendly, and offers the most intelligent workforce in the country.

Major **challenges** are the no-growth policies and red tape. Areas like Loveland are growing and Fort Collins is "standing still." Suggestions include capitalizing on the strengths of the university and re-establishing the community as the leader of Northern Colorado. People need to look past the development along 1-25 and see Fort Collins as the center of the action.

A stronger identity will help Fort Collins become the hub of Northern Colorado.

Fort Collins is frequently compared to Boulder, but Fort Collins is seen as more well-rounded.

It is outdoorsy, innovative, environmental...but also very down-to-earth. Fort Collins is closer to its agricultural heritage than Boulder and “feels more real.”

Businesses that “got away”:

Most companies we spoke with that “got away” typically relocated due to a more strategic location for their business due to market and/or vendor accessibility. In terms of the disadvantages of doing business in Fort Collins, red tape and “add-ons” were said to “add up” in the end. Property approvals are much easier in communities like Windsor and Loveland. Others described the community as “schizophrenic” because some pockets are vehemently anti-business, while others welcome it. When relocating to Loveland, one interviewee said he had involvement with both the City Manager and Mayor – and this did not happen in Fort Collins. Loveland also did everything possible to make it an easy transition (quick turnaround and no money upfront).

On the other hand, most were very positive about the community in general – the arts/culture scene, restaurants, shopping, the outdoors and overall quality of life.

Northern Colorado Multicultural Corporation:

This organization serves as a visible advocate for diversity in Northern Colorado and a resource for minority groups by promoting awareness, appreciation and inclusion within the business, private, public and nonprofit communities.

Members of this organization describe Fort Collins as an **accepting community** that values its differences, as well as a great place to live and raise a family. However, Fort Collins is **not a very diverse** community, being 90% white, and there is not much of a support base for ethnic groups and businesses.

Suggestions for improvement include showcasing the community’s increasing efforts to support diverse groups and businesses, and make minority groups feel welcome. Large organized events that celebrate differences in an all-inclusive way would also be helpful.

This organization reflects the values of Fort Collins through its mission to become a role model in the community and encourage people to learn about and discuss their differences in order to be more accepting of others. Fort Collins should become a role model for other cities as well.

ONLINE COMMUNITY SURVEY

Purpose

The purpose of the Online Community Survey is to gain a qualitative and quantitative measure of the community's perceptions of Fort Collins.

Methodology

North Star developed an online survey based on the results of the stakeholder Vision Survey, and the community was encouraged to participate.

Results

Total respondents: 339. Residents who participated feel:

- Fort Collins is best described as healthy/active (38%) and family-friendly (26%).
- Fort Collins greatest asset is natural beauty [mountains, rivers, parks] (42%) and Old Town [downtown] (16%).
- Visitors are attracted to Fort Collins by Colorado State University (43%) and outdoor recreation/Poudre River (39%).
- Businesses are attracted to Fort Collins by the quality of the community (52%).
- Residents are attracted to Fort Collins by the community values (27%), the climate (19%), and the recreational activities (19%).
- People who have never been to the area think Fort Collins is friendly/inviting (28%), beautiful (25%) and a college town (22%).
- Potential visitors, residents and businesses are prevented from learning more about Fort Collins due to overshadowing by Denver/Boulder (37%) and a lack of major attractions (25%).
- Fort Collins biggest challenge is business retention/recruitment (25%) and managing growth (24%).
- The biggest opportunities for employment growth are in the biosciences (22%), clean energy (21%) and tourism [arts/culture/entertainment/recreation] (19%).
- Fort Collins aspires to be a leader in Northern Colorado (47%) and a cultural center (19%).
- Fort Collins is a unique Colorado city due to the excellent quality of life (60%).

CONSUMER AWARENESS AND PERCEPTION STUDY

Purpose

The purpose of this study is to gain insight into consumer awareness, visitation and perception of Fort Collins, Colorado.

Methodology

A telephone survey was conducted among consumers in two key competitive markets for Fort Collins, Colorado. The two markets used for this CAP Study were Denver, Colorado and Colorado Springs, Colorado.

A total of 200 surveys were conducted, allowing for a margin of error at +/- 7.04% at a 95% confidence level. 100 interviews were conducted in the Denver, Colorado market and 100 interviews in Colorado Springs, Colorado market.

North Star Research developed the survey instrument, fielded the research, tabulated, and analyzed the data. The interviews were conducted between September 11th and September 25th. The analysis was completed immediately thereafter.

The survey was specifically developed to measure:

- The overall perception of Fort Collins among consumers.
- Whether consumers have visited Fort Collins.
- What consumers would add to and/or take away from Fort Collins to make it a more exciting place.
- Whether consumer perception of Fort Collins changed after visiting.

Results

- Fort Collins, Colorado received fifty-five percent (55%) unaided awareness when respondents were asked “what cities or communities come to mind when you think of the Northern Colorado?” Fort Collins received one hundred percent (100%) total awareness which is a combination of unaided and aided awareness.
- The top of mind perception of Fort Collins is a college town with the Colorado State University as well as a community with outdoor activities, the mountains, and microbreweries. Fort Collins is also known for being a pretty community.
- The adjectives that describe Fort Collins are beautiful, Colorado State University, and a friendly community. Almost half (45%) of the respondents did not know of any adjectives that would describe Fort Collins.
- A community that emphasizes alternative energy would have clean air, clean water, public transportation system running on alternative energy and be environmentally conscious using wind energy, solar energy and renewable

materials. Some of the respondents think the rates would be cheaper with alternative energy and some tend to think the rates would be higher.

- The emphasis on microbreweries overwhelmingly suggests to respondents that the community likes beer. Respondents also look at the microbreweries as employment opportunities for the community. Microbreweries are associated with a young crowd or yuppies.
- Forty-nine percent (49%) of the respondents had visited Fort Collins in the past three years. Most of those visits were day trips.
- The primary purpose for visiting Fort Collins was a leisure trip (35%). Thirtyfour percent (34%) of the respondents' primary purpose of visiting Fort Collins was to visit friends and relatives. Twelve percent (12%) visited Fort Collins on business and fifteen percent (15%) combined both business and pleasure on their trip.
- When respondents were asked to rate attributes regarding Fort Collins, Colorado on a scale of 1 to 5 with 1 being "poor" and 5 being "excellent", the appearance of the city was the highest rated statement with a mean score of 4.03. Fort Collins being a city committed to the community was rated 3.74 and the downtown as a center piece of the city was rated 3.61.
- Fort Collins is viewed as the microbrewery capital in Colorado along with Golden, Colorado.

Brand Building Messages

The following brand building lines were created by North Star for the BrandPrint with the city of Fort Collins. The communications office encourages City departments, community partners and private businesses to use these messages to tell the story of renewal, energy and passion that is in our city and residents.

A town that respects you for your mind as much as your body.

A town that's as committed to saving the environment as it is to enjoying it.

When the body has room to move, so does the imagination.

People that keep their bodies in shape tend to keep their companies healthy, too.

The businesses are independent. The passion is mass-produced.

The only thing we mass-produce is passion.

Commitment to renewable energy. As if the hiking trails didn't provide that already.

The art scene has to be pretty good to compete with views like this.

We believe in equal-opportunity. Especially between career, family and passions.

Following your passions and pursuing your career don't have to be mutually exclusive.

Living near fresh mountain water inspires many dreams. Just ask one of the 50 microbrewers here.

A city focused on renewable energy can have a similar effect on your own.

Meet the town's oldest resident: The Poudre River, dispenser of wisdom for generations.

Hard to believe this is a town that believes in conserving energy. (show people biking)

This far above sea level, you can't help but have better perspective on things.

The air is thinner here. Maybe that's why people savor every breath.

The arts are thriving here. Particularly the latest works from Mother Nature.

Our long history with recycling started with turning mountain water into microbrews.

Following your passions and pursuing your career don't have to be mutually exclusive.



Maybe the best place
to start a new business,
is where people have no shortage of initiative.

Fort Collins
where business is a way of life

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On a quiet day,
you can almost hear your priorities changing.

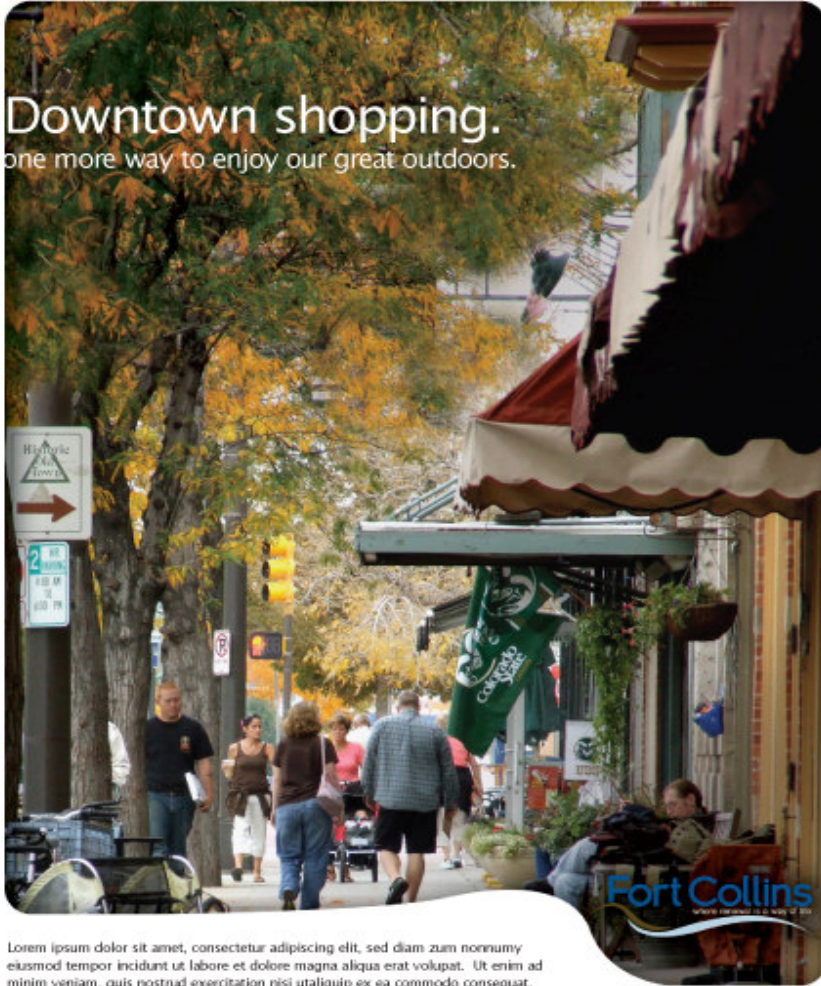
Fort Collins
where the world is a better place.

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Tourism Ad Full Page Process Color

Downtown shopping.
One more way to enjoy our great outdoors.



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Downtown Ad Full Page Process Color

We call it Old Town.
but you'll call it refreshing.



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Fort Collins
Where the world is a better place.

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Downtown Ad Full Page Process Color


Maybe the best place
to start a hobby,
is where you never want to stop.



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Fort Collins

Where renewal is a way of life.



Hard to say what's healthier.
The people here, or the companies they run.

Fort Collins
WHERE LEADERS GO TO RUN

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