



Creating A Profile of Current Visitors

An NTC White Paper

A Profile of Current Visitors is Critical

As a starting place for expanding tourism, any community currently attracting visitors will want to be able “clone” more of them. This approach will most efficiently expand the visitor population, since current visitors represent the visitor market already responding to the experience available in the community. In reviewing the marketing plans of scores of communities, DMMOs, and other tourism marketing agencies, it has become clear the majority lack specific and detailed visitor profiling at the local level. In many areas, visitors are targeted geographically, without a focus on what of interest would attract them, targeted demographically, or various tourism resources and assets are grouped together to form visitor attraction categories without a focus on the visitors themselves.

The lack of in-depth visitor research and profiling is likely due to DMMOs hesitation to specifically target visitor markets in fear of losing some visitors. This is coupled with a perception that “on the ground” research is expensive, could be skewed depending on the mix of travelers in the destination at any given time, or the sample size not large enough to render accurate results.

In today’s marketing environment of precise market targeting in other industries, we’ve past the point where a community can promote their resources and assets with the simple statement “we have something for everyone.” Visitors don’t want to sort through the information to find something of interest, they want the DMMO to point it out. Alignment of detailed profiles of current visitors with the tourism resources and assets compiled in the comprehensive inventory point out which ones are attracting these visitors, information that serves as the basis for positioning and messaging to attract more.

Compiling Detailed Current Visitor Profiles

There are many different ways information about current visitors can be gathered. To be most accurate, it is important to gather data from four different sources (1) state tourism office, (2) regional visitor marketing organizations, (3) local suppliers, and (4) the visitors themselves. Ultimately, this chapter will propose a very different approach that has been found to work very effectively, but is not being used in most communities.

Start with State Data

Any community can start by accessing information from the state tourism office which generally make information available online. All states conduct regular research regarding visitors coming to the state. Even though tourism is more important to some states than others, all now clearly understand the jobs that tourism delivers. It's important to access the most recent data available. Many states did not conduct visitor research during Covid and more recent data reveals that visitor behavior changed dramatically during that time. If there is no post-Covid visitor research available, inquire as to when the next research will be conducted. If necessary, access data about existing visitors available from neighboring states to get a more recent look.

State data will normally also reveal the total amount of visitor spending that occurs in the state, the number of jobs that spending generates, and the increases that have taken place over the past few years. A portion of jobs in restaurants and bars should be included in these figures, since all derive a portion of their revenue from visitors. The total of tax revenues associated with these jobs should also be available, along with the portion of the GDP (gross domestic product) that tourism

delivers to the state. Some states are so heavily dependent upon tourism that it makes up a third of total GDP. States are normally able to get a fairly accurate total of the number of visitors who are welcomed to the state in any given year, the percentage of those visitors who stayed overnight, and those who arrived only for a day trip. They also generally tally the percentage of repeat visitors.

The average pre person daily spend normally indicates the largest portion of expenditures spent on lodging, although in some locations, dining has taken over as the biggest spending category of visitors. About half of these amounts are expended each on transportation, retail purchases, and attractions and entertainment. Calculating the average per person daily spend x the number in the traveling party reveals the economic value of each traveling party.

Approximately 30%-40% of visitors in most states arrive to visit friends and family and traditionally, it has been assumed these visitors stayed with friends and family, making marketing to this segment rather worthless. This assumption has been totally dismantled, since at least 20% of the visitors do not choose to stay with friends or family, booking instead into some type of accommodations. Also, often, the arrival of family and friends presents an opportunity for both the visitors and their hosts to get out and do things. These factors change the “marketable” equation of trips entirely, increasing the number for both the state and DMMOs. State data generally also reveals the other reasons visitors arrive in the state, such as for touring, to participate in outdoor activities, visiting a city, or arriving on a business trip.

It is also important to understand how visitor arrivals are distributed throughout the year, as well as the composition of the traveling parties, whether or not there are children in the traveling parties, and where visitors arrive from. The majority of visitors to most states come from within the state itself, and generally, the next highest levels arrive from surrounding states. However, this is not always true. For example, in reviewing the arrivals to Idaho, as high a percentage of visitors arrived from California as did from Utah, right next door.

Regional Data

Most states divide their state into tourism regions to further define visitor information, information which may serve as a “modifier” or bridge between state and local data. The following detailed example is included here in order to illustrate how complex it can be in some areas to get accurate visitor profile information. There are organizations, other than the state that produce regional visitor information, which use different regional boundaries than the state. In some locations there is complete confusion, with the most applicable information to be used becoming a judgment call that can best be verified by information obtained locally.

In Idaho, a selection of organizations produce data for a region called East Central Idaho. This region is defined as including Custer County, which is more central to the state, and Fremont County, which is the gateway to Yellowstone National Park. This district is referred to as having countless options for entertainment, sport, and recreation. In fact, what is termed as East Central Idaho is deemed the third most popular region visited in Idaho. The tourism office, however, does not include an

East Central Region, instead divides the area into Central Idaho and Eastern Idaho.

So the question became should a portrait of visitors specific to the region encompassing the Lost River Valley that included both Custer and Butte Counties, with one part of the Central Idaho Region and the other in the Eastern Idaho Region, be based on the Central Idaho Visitor Profile or Eastern Idaho Visitor Profile. Data from several sources supported using the data from the Eastern Idaho Visitor profile because Blaine County (home to Sun Valley) in the Central Idaho profile skewed the data. Just over 25% of employment in Blaine was direct travel and tourism employment, as compared to Custer County with 15.5% travel employment and Butte County, with only .5% employed in travel and tourism.

To complicate matters even further, just at 40% of visitors to Eastern Idaho arrived to visit family and friends. This is slightly lower than the United States, but 7% higher than Idaho. Visitors that fell into the next largest category in Eastern Idaho (22%) arrived to participate in outdoor activities, yet only 13% of visitors arrived in Idaho to do so. Less than 10% of visitors to Eastern Idaho arrive to engage in “touring” and only 6% arrive to do a city trip. In both the Central and Eastern visitor profiles only 2-3% arrive for skiing/snowboarding, even though the huge ski area of Sun Valley was included in the Central Idaho visitor profile. Data regarding visitor originating destinations also differed between regions. 21% of visitors to Eastern Idaho arrived from within the state, 12% from Utah, 8% from California 5% from Arizona, and 5% from Texas. By contrast, 24% of the visitors to Central arrived from within the state, 8% from California, 6% from Texas, 5% from Utah, and 5% from Washington. The data also indicates an average stay of 2.8 nights,

with nearly 50% of visitors spent only one night in the area, yet 20% spent 3-4 nights in Eastern Idaho.

The fact that only half of the visitors to Eastern Idaho who arrived to visit family and friends actually stayed with them, along with the 5% of visitors who arrived for business, revealed 70% of the trips to this region as being “marketable” (visitors available to be booked into commercial accommodations), as opposed to the 48% considered marketable by the tourism office.

Local Data

Due to the anomalies and contradictions indicated in the above example, we became of the mind that the only people who would really know the needed information about the visitors, are the visitors themselves and the people who serve them, the hotels, restaurants, museums, and attractions, and others who interact directly with the visitors. To obtain data from the visitors themselves, tools like Survey Monkey and surveys deployed through social media are an inexpensive way to obtain direct visitor data.

However, to get the real scoop on current visitors, data obtained from local accommodations properties who actually collect visitor information every time they check someone in, and attractions who are doing the same, is the only way to make sure that current visitor profiles are accurate.

Continuing with the above Idaho region example, zip code data obtained from hotels indicated that in addition to arrivals from with Idaho itself, the next highest

totals were from California at 8% and Utah at 8%, with Montana, Washington, Oregon, and Nevada, coming on behind. That data was backed up with visitor data from the local museum, which pointed to the same pattern. Data from the local area did not reflect the arrival percentage from New York or Chicago reflected in information from the tourism office, with arrivals from both of those states in information received locally, standing at less than 1%. The fact that arrivals from Texas were not in the local mix, as they were in state and regional data made a significant difference in initial market targeting. More attention could be paid to attracting visitors from surrounding states when marketing funds to promote in Texas were eliminated.

Local data also reflected a longer length of stay at 3.5 days as compared to state data at an average of 2.8 days. The additional room night added significantly to the economic impact of visitors at the local level, who also ate, shopped, and visited attractions during that extra time. There were also significant differences in travel patterns in the region. Mackay, Arco, Salmon and Challis are all located on a highway loop that traverses the central portion of Idaho, the same loop that makes up the Peaks to Craters Scenic Byway, the Salmon River Scenic Byway and the Sawtooth Byway. Information received from traffic counters indicate that traffic on the section of this loop through Mackay was a fraction of the traffic at other locations along the loop and in other parts of Idaho. These facts meant that dramatically fewer people were traveling the roads through the Butte and Custer counties area. This coincides with information obtained from Craters of the Moon National Monument that visitors were mostly arriving while transiting east to west through to Yellowstone National Park, as opposed to arriving from the north on the highway loop.

Working Together with Local Suppliers

A coalition including the DMMO, local suppliers, lodging properties, restaurants, attractions, and selected retail locations to obtain visitor zip code and other cogent visitor information is ultimately going to produce the most accurate results. This information will reveal the hierarchy of feeder destinations to establish the point of origin of visitors, length of stay, size and typical composition of the traveling parties, and the core of visitor spending, their lodging outlay. This information is especially important for communities that are deemed “drive” destinations, since the information will reveal the radius from which these visitors are traveling into the community.

When compiling information that is as important as this for the success of the tourism program, it is very important to be thorough, using multiple methods to form a real and complete picture of the area’s visitors. Information obtained from Google Analytics or other analytic program on the website, as well as the insights of each social media platform should be included, along with any information collected by the Chamber of Commerce, the Economic Development office, any organization working on the downtown revitalization, and any other local organizations that may have cogent information.

In addition to information obtained from surveys on social media, a visitors survey on the website can continue to gain visitor information in real time. It would also be helpful if accommodations properties could collect information about the reasons for visiting and activities that are likely to be pursued when they check guests in.

We understand completely that many commercial hotel properties will be very resistant to sharing any data about their visitors. DMMOs must explain how critical it is to be able to precisely target visitor marketing in order to spend marketing funding most prudently for maximum results.

The Data Directs Marketing Actions

The differences in the visitor profile noted in local data had a definite impact of future marketing programs. Different destinations of origin than those recorded by the tourism office were used to target the locations where existing visitors were actually arriving from. Arrivals from California and Utah to Eastern Idaho were virtually tied for second place, after arrivals from Idaho itself, followed by Montana, Washington State and to a lesser extent, Oregon. Targeting in these areas coincides with the trend of travel “closer to home.” Initial increased promotion focused on Utah, Montana, Washington, and Oregon, rather than concentrating on Arizona and Texas, rendered better results.

Other factors in the above example, revealed in the collected data also translated into specific marketing actions. Even though only 40% of the trips to Idaho were overnight trips, the average length of stay in the state was nearing 3 nights. To increase the number of visitors that stay longer, it was important to offer pre-designed itineraries in several themes that encompass a 3-4 day stay, making it easier for visitors to plan and engage in multiple night experiences. Educating local residents about the availability of accommodations works to make more of the trips to visit friends and family marketable. Promoting the whole variety of experiences available in the region would lead to increases in the per trip spend through the inclusion of more and different types of activities in any trip. The presence of

40% of visitors with household incomes of \$75K and higher provided an adequate level of discretionary income for traveling parties to enjoy trips filled with distinctive experiences.

With less than 10% of traffic from other areas traveling through the Lost River Valley, it became very important to determine ways in which visitors could be pulled from the western side of the loop formed by the three Scenic Byways over to Craters of the Moon and beyond to visit Arco, Mackay, Salmon, and Challis. Consideration will have to be given to defining an experience at the level of Craters of the Moon to draw visitors further around the highway loop.

With 22% engaging in outdoor recreation in Eastern Idaho, outdoor recreation is very important for the economy of the region. Data from the Bureau of Land Management indicated a total of 67,606 visitors to the Mackay area, with nature viewing, wildlife viewing, hiking and picnicking the most popular activities. Increased promotion of snow related activities, fishing, boating, hunting, hiking, camping and mountain biking will spread recreational visitors throughout the year. There may be opportunities to attract winter sport visitors from other parts of the country more severely affected by changing climates.

There was also a very significant opportunity to increase the volume of visitors who indicate they arrive to engage in “touring.” Even though in Idaho in general, visitors who arrive for “touring” greatly outnumber visitors who arrive for outdoor recreation, in Eastern Idaho they make up only 9% of visitors, unusual for a state that is considered a “driving” destination (where most travel is by personal automobile).

There are more than 69 million Americans who enjoy driving scenic roads while exploring the heritage and culture along the way. Nearly 90% of visitors to the region already either drive their own car, a rental, or get around by another vehicle on wheels. However, since the proportion of visitors who arrive for touring purposes is so small, this is a market that will have to be worked into, in order to more immediately focus on expanding the number of visitors who travel to the region for other purposes.

This market does not expect luxury, these visitors are looking for authenticity and to experience a region “as it is.” Promotion of the “driving travel” aspects of the region will serve to increase the percentage of visitors who arrive for “touring,” to deliver a substantive new target market. Data from Travel Oregon indicates these visitors spend as much as \$2,497 per trip, which would represent a significant increase in visitor spending in the region.

Compiling a complete profile of current visitors may not be an easy task, as noted by the above. Yet, it is critical to clearly understand current visitors, since the most lucrative initial target markets are more of the types of visitors who are already arriving.