Critical Assessments to Determine Your Community's Tourism Potential

Delivering increases in tourism and attracting more visitors to any community requires a carefully managed effort, based on the principles involved in work to increase the economic prospects in any area. There are several critical assessments that should be completed that serve as the foundation to increase tourism most effectively and articulate the capacity of the community to serve more visitors: (1) a comprehensive inventory of tourism assets and resources, (2) a capacity assessment to determine the additional visitors that can effectively be served, (3) a competitive assessment of what other communities in the area are doing to attract and serve visitors, and (4) a profile of current visitors to be able to "clone" them as the first rung of additional visitors attraction.

A Comprehensive Inventory of Tourism Resources and Assets

The place to begin is discovering what the destination has to offer. And most often, when the full spectrum of resources and assets within the destination and surrounding area are assessed, the collection of attractions and activities the destination can offer is much larger than originally anticipated. Visitors will travel as much as 20-30 miles from the destination hub to explore or engage with a location that is part of the experience they want, so all the attractions, activities and resources within that radius should be included in the assessment. Destinations may find themselves pleasantly surprised. Plus, attractions, activities and assets that appeal to markets that are now not being attracted must be included, in order to understand the full spectrum of resources that can be used to attract visitors.

The resources and assets that are discovered through this process point to the markets that can be attracted to the area. Even if the region has traditionally only focused on outdoor recreation visitors, all available culture and heritage must be

added to the resource mix. Plus, scenic roads, a sequence of locations that can be formed into a heritage trail, destination resources such as a series of breweries and distilleries that can become a tasting trail, or local foodways that form a destination distinctive culinary trail are generally always at hand. This approach may seem redundant, but visitors who are unfamiliar with the destination will welcome the availability of an already designed experience that they can just take and not have to research. Be sure to include arts locations, art galleries, and unique local retail in the resource mix. Plus, any federal lands even if there are no developed locations within these hands.

Compiling the Inventory

It's important to start with a clean slate and a fresh set of eyes, and record EVERY location within a 30-mile radius that can contribute to visitor experiences. Detailed research in an area that has not previously completed an inventory most often reveals an area replete with attractions. These resources are often connected by scenic byways, heritage corridors, and historic trails that serve as economic drivers in their own right, or at least, scenic drives that make the routes in between very pleasant. This is especially true in areas where significant attractions are paired with very limited accommodations capacity, fewer dining options, and general lack of specialty retail resulting in many good opportunities being overlooked.

If, like so many communities dipping their toes into tourism waters, the concentration has been on outdoor recreation, it is very important to look at cultural and heritage locations in and around the community since these visitors illustrated to these locations have completely different and generally higher spending patterns than outdoor recreation visitors. In addition, a more refined

assessment of outdoor recreation niches may also yield new target markets, such as more generic hikers in addition to mountain climbers, cross-country skiers in addition to, or in place of, traditional skiers, mountain bikers who are always seeking new places to ride, and pleasure drivers who seek out new scenic routes.

Ironically, many DMMOs which are membership based don't know the full scope of the resources and assets in their communities, since most have only 10%-25% of the locations as members. Over the years, businesses come and go, new restaurants pop up, new recreation facilities are built, and some locations with limited budget do not sign on as members. Being completely knowledgeable about all the available resources and assets is the only way a DMMO can serve as the premier visitor information resource for today's visitor. If they come upon something that interests them and they don't see it on the website, tourism get points off in their mind. Plus, experience shows that what is revealed can change everyone's perspective of the potential for tourism. Inclusion of "the rest" can make a community look very different, with a very different personality.

Collection of the Information

Since the available resources and assets determine the visitor markets a community can attract, it is essential to diligently collect all the information. A simple, well organized spreadsheet will work fine at first. Once the resources and assets have been incorporated in a spreadsheet and organized with one category per tab, couple it with a Google map, to see the relationships between the various places. Include complete contact information such as street address, phone, and email to use the database to communicate with each location as the program evolves, as well as hours of operation to illustrate the patterns of visitation available to visitors. Also

add whether or not the location is "visitor ready," and make provision to include a description and image at a later date.

If you feel like you're using resources from neighboring locations, no worries, everybody does it to expand their visitor offerings as much as possible. A complete inventory enables you to expand tourism offerings further by combining locations into pre-designed experiences, thematic trails, walking tours, detailed itineraries, scenic drives and more. A good example of dividing resources into categories is a destination in California that when the whole list was assembled, had 53 RV parks, but was not promoting the location to RV travelers. Only by compiling all the locations was this resource and opportunity revealed.

Carrying Capacity Assessment

The other assessment that should be completed is an assessment of the carrying capacity of the destination to handle more visitors. The professional you call in to do this assessment must be brutally honest about the results. Yet, do not despair, there are ways to work around deficiencies in carrying capacity and improvements that can be made over the longer term. If there is limited availability of accommodations, an agreement can be made with more regional lodging properties to house additional visitors, while pointing them to attractions and activities in your community.

Begin with Attractions

Begin the capacity analysis by separating the available attractions into three categories: (1) premier, of national interest, (2) resources of regional interest that complement those of national interest and by themselves, can serve to attract

visitors, and (3) local, those which will fill in parts of a visit, but will not in themselves, serve as a draw to attract visitors.

When looking to combine the attractions into itineraries, a trail or other pre-designed experience, if one location is only open on Saturday and Sunday and another thematically related location only open Tuesday-Thursday, there may not be any point in including both of these locations into a short itinerary, unless visitors are given specific instructions about what is available, and when. Including locations within pre-designed experiences that visitors cannot do within the time frame just annoys them. Likely they will not return to do the things that were not open and could not experience even though they were pointed out as special and likely announce to their friends or in an unflattering review, they could not do all the things they wanted to do while visiting. Groupings of locations that are open on two consecutive days can be thematically combined into a 2 Day experience.

If there are gaps in the availability of attractions and whole days of the week where there is virtually nothing to see and do, DMMOs will need to work with various locations to rectify the situation. Otherwise let potential visitors know when availability of places to visit, dine, and shop will be an issue. For example, exploring an Amish area revealed that there were no restaurants or shops open on Sunday and provisions had to be made to find a place to eat in the next town. Visitors need to know that in advance to they can prepare.

Next, Address Dining Capacity

Visitors need places to eat every day, making a detailed assessment of dining capacity very important. Completing this step will require liaison with the owners

of the various dining locations to determine the available dining coverage. Expand the inventory spreadsheet to include a column that indicates the number of seats available in total at each restaurant. And work with each restauranteur to determine the average capacity of the restaurant occupied by local residents for breakfast, lunch, and dinner, and any times that the restaurant is already at capacity with local traffic. The results of this assessment illustrate where there are gaps in the ability to serve additional visitors and gaps in the availability of dining. If the location has a larger number of dining locations, it may be beneficial to divide the list into types of cuisine to look at the types of dining that are available at any given time.

Assess the Capacity of Accommodations

Even though there are over 132,000 hotels and more other types of lodging in the US, there are communities with very limited lodging capacity. Plus, there are other locations, such as small towns where accommodations are so limited that during busy event periods, those in the core area can only hold the event producers and other functional staff, requiring visitors to stay elsewhere. There will be times of the year when all accommodations are filled to capacity, and others, such as winter, when the properties are barely occupied. If the area has a good number of RV parks, (also accommodations), the number of camping spots will determine the scope of the opportunity to promote to these visitors.

Information to be recorded here are the number of rooms and capacity of each room (number of beds/guests in each room), coupled with the average occupancy per season that each accommodations property realizes. Knowing the total number of rooms available and the periods when they are already filled is critical to

know when planning promotions that include overnight stays. Potential visitors will be frustrated if they plan to visit and cannot find accommodations to do so.

Assess the Capacity of Destination Distinctive Retail

It is important to know three things about area shopping: what days of the week and hours the various shops open, the types of unique and boutique retail available, and the clustering of shops in an area, if any. Align hours and days retail locations are open with similar information compiled about attractions and restaurants. Combining all three categories illustrates patterns of available visitor activity, as well as times when there is simply nothing, or not enough open for visitors to see, do, dine, and shop.

Assess the Capacity of Other Needed Visitor Services

Make sure there is at least one medical facility available for emergencies at all times, even if it is in the next community over, there are reasonable banking services available, and other locations in the "life happens" categories available to serve visitors should the need arise. Keep in mind, accidents and adversities on a trip do not always occur conveniently during regular business hours and arrangements must be made to deal with visitor's emergencies whenever they occur.

An Assessment of Competing Destinations and Communities

In the world of non-profits where everyone was friends, it was challenging to consider the DMMO from the next county over as competition. As the entire business climate of the US has changed, that is changing as well. DMMOs are learning the value of competitive strategies and asking the question: what makes visitors chose the next County over, or another region, or another attraction or

resort, instead of our offering? Why would they go to a location further away, instead of enjoying what we have on offer? How have their visitor numbers increased, while ours have stayed the same? What other results are out of whack in comparison to the locations surrounding us, and how, can, or should, our actions be evaluated, and re-aligned to achieve the same success?

The key to answering these questions and more, is to really understand first, that there is a competitive set of destinations for every community. This factor is coupled with the fact that competition between destinations in the United States has crept up to a new high over the past 40 years, as more counties, municipalities, cities and other locations have discovered that visitors can deliver positive economic development. Conducting a competitive assessment of the locations and benchmarking the information against the DMMOs own results, is a tool that can be used to ensure greater success.

Plus competition comes from many places. Cities are a common destination, with 2-4 day City Breaks a common product in the travel industry. But an event can also be a destination. Large attractions, such as Hershey Park or the Grand Canyon also serve as destinations, with their own brands and carefully planned and choreographed experiences waiting for visitors. Large resort hotels and even today's massive retail complexes with entertainment and restaurants, and marketing budgets bigger than some counties, also qualify destinations seeking to attract visitors from taking trips elsewhere.

Effectively dealing with competition requires knowledge of the competitive set, the key success factors of a DMMO, and the use of proactive strategy to determine the

future of tourism. When evaluating the results of a competitive set begin the research with information that is publicly available: websites, visitors guides, annual reports, marketing plans, and other materials that DMMOs publish, now most often online.

At the end of the process, the tourism team should have answers to:

What makes a visitor choose another location over ours? Another region? Another town?

Why would visitors go to another location further away, instead of enjoying what is offered closer to home?

Why have visitor numbers at surrounding destinations increased?

Which of the results discovered seem out of whack when comparing all regional offerings?

How can, or should, our own actions be evaluated and re-aligned to achieve the same or a higher level of success?

The key to answering these questions is to really explore the surrounding area, with a roll up the sleeves, hands on, digging in every possible corner, totally engaged approach. Understanding what other locations are offering, and what they are likely going to do in the future, will greatly assist in competing in the future.

Thoroughness in the analysis will produce true insights, will point out the community's own competitive advantage, and reveal even small changes that can make a huge difference in overall future results.

It's not a good idea to have others do the competitive analysis entirely, because it is never as effective as a first hand impression that renders the benefit of insights that might be missed by others. Keep in mind that competitive results are going to vary greatly by the organizational size and budget of organizations managing the competing locations. They are also significantly impacted by marketing programs, which can make as much of a difference as unique experience offerings do.

Getting Started

Prepare a spreadsheet with the competing locations on the vertical axis and columns for the various characteristics to be evaluated across the horizontal axis.

As the blanks are filled in, patterns will emerge. Once data has been gathered for all competitors, go back and assess the community's own equivalent data. Be honest and brutal in the assessment and comparison. Only then will the real answers be revealed.

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.