

BASELINE TOURISM ASSESSMENT & STRATEGIC PLANNING

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UNDERSTANDING TRIBAL TOURISM

"Tell me and I will forget.

Show me and I may remember.

Involve me and I will understand."

~Chinese Proverb



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HOW MONEY TRAVELS



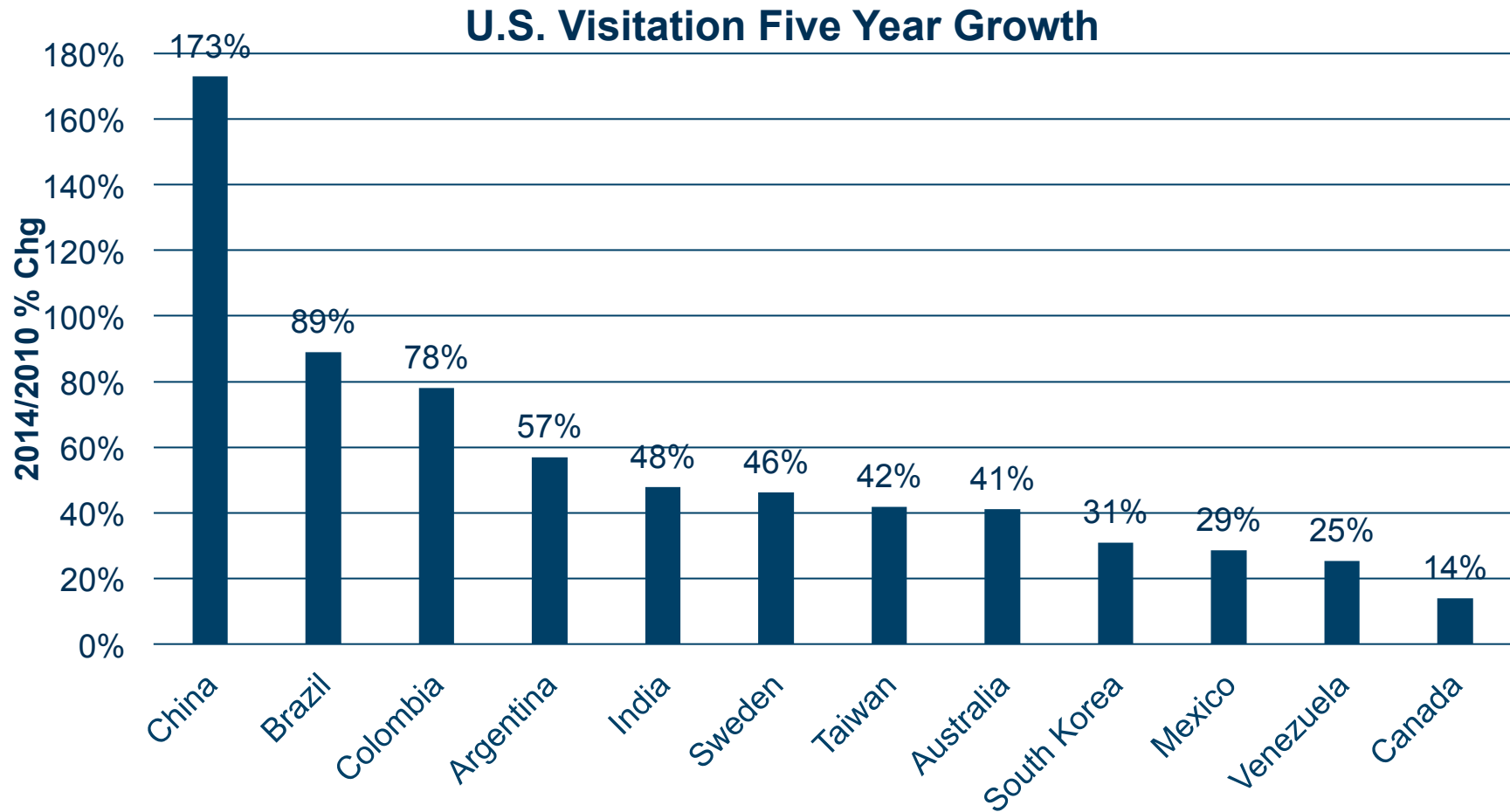
SHORT-TERM FORECAST

INBOUND TRAVEL TO THE U.S. OCT. 2014

Visitor Origin	2014 (000)	% Change	2015 (000)	% Change	2016 (000)	% Change
Total Visitors	73,887	6%	76,589	4%	79,127	3%
Overseas	33,629	5%	35,026	4%	36,558	4%
Canada	23,621	1%	24,094	2%	24,575	2%
Mexico	16,638	16%	17,469	5%	17,994	3%
United Kingdom	3,950	3%	4,029	2%	4,110	2%
Japan	3,618	-3%	3,582	-1%	3,582	0%
China	2,240	24%	2,666	19%	3,119	17%
Brazil	2,205	7%	2,359	7%	2,500	6%
Germany	1,955	2%	1,994	2%	2,034	2%
France	1,625	8%	1,690	4%	1,724	2%

Source: Ron Erdmann, U.S. Department of Commerce, International Trade Administration,
National Travel & Tourism Office, February 2015

Emerging Markets Driving Growth



Source: U.S Department of Commerce

ACTIVITY PARTICIPATION OVERSEAS VISITORS TO THE USA COMPARED TO VISITORS TO AMERICAN INDIAN COMMUNITIES 2013

Activity	Visit Amer. Indian Comm. 2013	Overseas Travelers to the USA 2013	Point Change
Visit Am. Indian Comm.	100%	4%	97%
Shopping	91%	88%	4%
Sightseeing *	90%	77%	13%
Visit National Parks	75%	34%	42%
Small Towns/Countryside *	64%	27%	37%
Visit Historical Locations *	62%	27%	36%
Experience Fine Dining *	56%	39%	17%
Cultural Ethnic Heritage Sites *	54%	16%	39%
Art Gallery/Museum	51%	28%	22%
Guided Tours	49%	24%	26%

Source: Ron Erdmann, U.S. Department of Commerce, International Trade
Administration, National Travel & Tourism Office, February 2015

CAN TOURISM CONTRIBUTE POSITIVELY TO TRIBAL COMMUNITY OBJECTIVES?

1. Promoting sustainable development
2. Creating new products and catalyzing economic development
3. Stimulating employment and job creation
4. Gaining and maintaining competitiveness
5. Preserving local resources
- 6. Improving the quality of life**

WHAT DO TOURISTS WANT?



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FLORA AND FAUNA



HISTORY



ARCHAEOLOGY

ΣΥΝΟΨΗ
Το παλιό καινούριο Βυζαντινό Μουσείο της Αθήνας, βρίσκεται στον χώρο της Γλυπτικής Σχολής του Εθνικού Αρχαιολογικού Μουσείου. Το Μουσείο είναι ένα μοναδικό κτίριο, που φιλοξενεί το μεγαλύτερο συγκομιμμένο χώρο της Ελλάδας. Στο Μουσείο, οι επισκέπτες μπορούν να θαυμάσουν την ιστορία της Αρχαίας Αθήνας, αλλά και της Βυζαντινής και της Οθωμανικής περιόδου.



ΒΥΖΑΝΤΙΝΟ ΜΟΥΣΕΙΟ
Αν αναζητάτε ένα μοναδικό κτίριο, τότε το Βυζαντινό Μουσείο είναι η καλύτερη επιλογή. Το Μουσείο είναι ένα κτίριο που φιλοξενεί το μεγαλύτερο συγκομιμμένο χώρο της Ελλάδας. Στο Μουσείο, οι επισκέπτες μπορούν να θαυμάσουν την ιστορία της Αρχαίας Αθήνας, αλλά και της Βυζαντινής και της Οθωμανικής περιόδου.

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Local Events



Natural Recreation



LOCAL MUSIC



CUISINE





LOCAL CRAFTS



ARTS



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HOW CAN A TRIBAL COMMUNITY GET STARTED IN DEVELOPING ITS POTENTIAL?

1. Understanding where you are now (Situation Assessment)
2. Determining where you want to be (Vision, Market Position and Development Options)
3. Understanding how to get there (Sustainable Destination Strategy)
4. Execution (Implementation & Monitoring progress)

POOR PLANNING LEADS TO....



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GOOD PLANNING MEANS...

- Engaging stakeholders in the development of the tourism plan
- Considering cultural and historic sensitivities of Native Tourism by engaging tribal cultural, religious and history experts/specialists.
- Revisiting tourism routes that follow well established patterns and visitation to significant destination sites.
- Developing capacities in marketing and product development
- Providing opportunities for a uniting and participative forum to build common ground for tourism development



TOURISM STRATEGIC PLANNING



WHAT IS A STRATEGIC PLAN?

- A strategic plan is an integrated framework that provides a roadmap/plan of action for the achievement of policy goals through the implementation of programs, projects, targeted actions and allocation of resources.



WHY DO WE CONDUCT STRATEGIC PLANNING?

- 1) Need to develop a common vision, direction, and commitment
- 2) Helps provide a framework for coordination across stakeholder groups
- 3) Important to have medium to long-term perspective
- 4) Provides stability and predictability for private sector and investors
- 5) Promotes sustainability in terms of natural and cultural resource utilization



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TYPES OF TOURISM PLANS: GEOGRAPHICAL COVERAGE

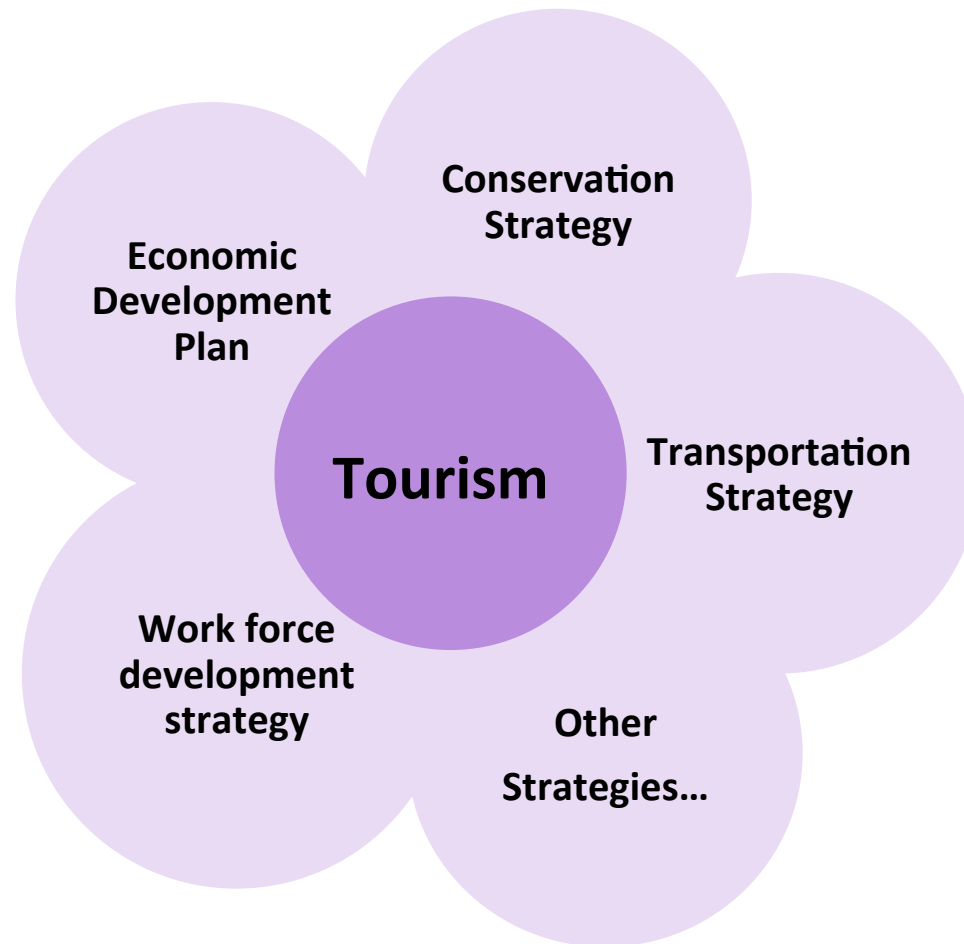
- **Regional (Multi-Country)**
- **National**
- **State**
- **Destination (Local)**



TYPES OF TOURISM PLANS: SCOPE

- **Tourism Sector** (focused on entire sector)
- **Sub-Sets of Tourism Sector**
 - Tourism Marketing (and Branding) Plan
 - Tourism Product Development Plan
 - Tourism Workforce Development Plan
- **Sub-Set of Larger Plan**
 - National Development Plan
 - Regional Development Plan
 - National Park Management Plan

ALTERNATIVE PLANS IMPACTING TOURISM



TOURISM MASTER PLAN

- Sometimes considered the same as a strategic plan
- Usually at national level
- Often looks at development from a larger perspective
- Tends to have a longer time frame
- May include a land use planning element



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PLAN LENGTH

10-15 years



3-8 years



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WHO IS INVOLVED IN PLAN CREATION?

- Team of Local and International Experts
- Team Leader
- Project Work Group
- Project Steering Committee



TOURISM PLANNING PHASES

Background Review

Assessment Process (Inventories,
Surveys, and Analysis)

Stakeholder Engagement (Including
Visioning)

Recommendations, Action Plan &
Implementation



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KEY ISSUES/CHALLENGES

- **Has there been enough local input?**
 - Are there local team members?
 - Have local stakeholders been widely consulted?
- **Is there enough time and money to create the plan?**
 - Have all regions/destinations been visited?
 - Was it possible to seek feedback/validation of the plan?
- **Does this represent a duplication of efforts?**
- **Is it clear how the plan will be implemented?**
 - Has a specific action plan been created?
- **Who will implement the plan?**
 - Are their staff that have been tasked with implementing the plan?
 - Do they have the requisite capacity to implement the plan?
- **Is there enough money to implement the plan?**
- **Is there political will to implement the plan?**

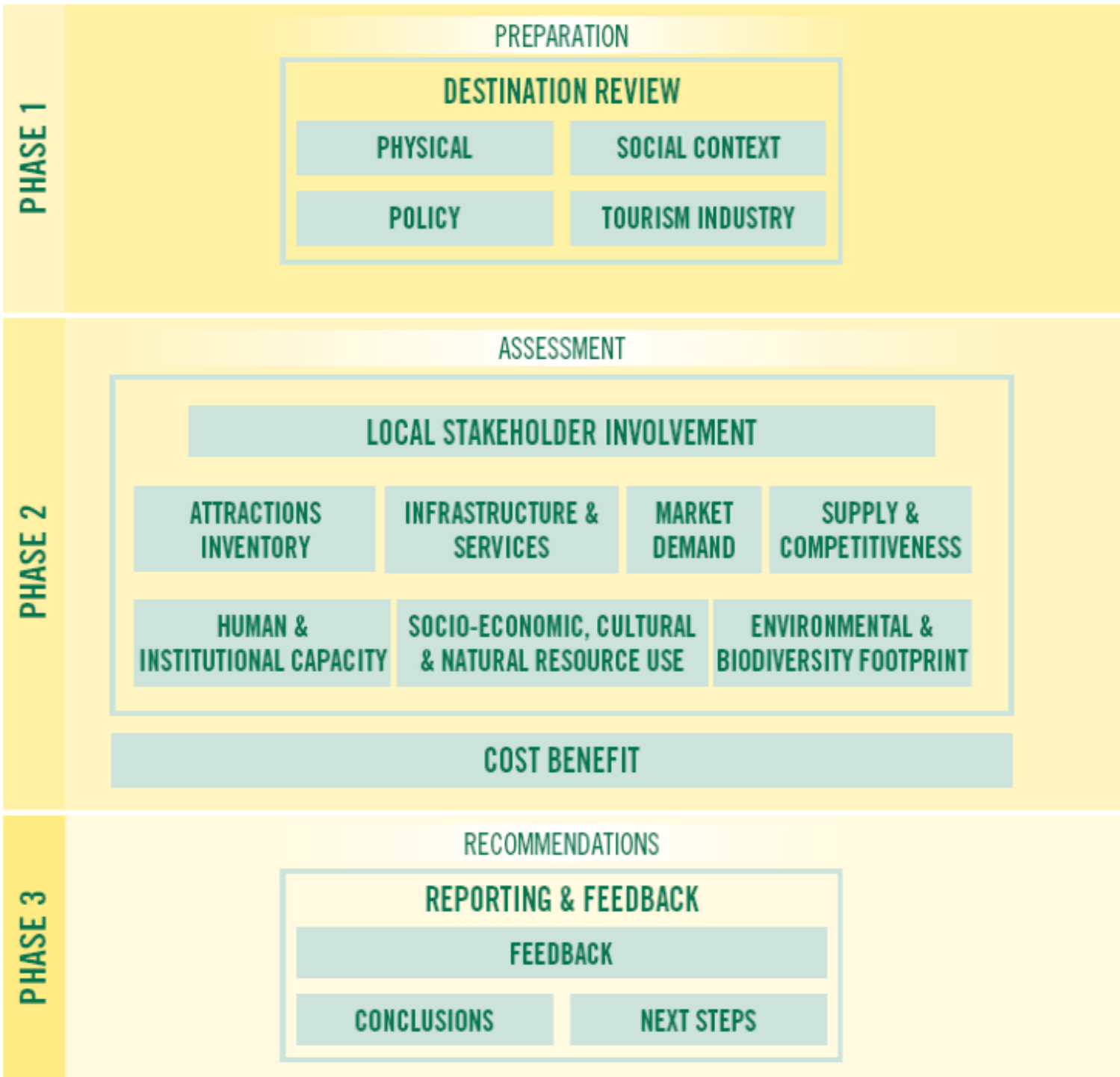


TOURISM ASSESSMENT TOOLKIT



Tourism,
Conservation
and
Communities:
A Tourism
Assessment
Process:

TOURISM PLANNING PROCESS



ASSESSMENT PROCESS & STAKEHOLDER ENGAGEMENT

- Inventory of available resources for tourism development within Tribal areas (including cultural, heritage, natural, and festivals, etc.).
- Analysis of “readiness” of the resource & tourism draw.
- Review of potential markets and recommendations for enhancement



TOURISM ASSESSMENT PHASES

Destination Review

Assessment Process & Stakeholder Engagement

Visioning & Strategic Planning

Recommendations, Next Steps & Implementation



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DESTINATION REVIEW

- Physical – geography, climate, key biodiversity areas and natural resources
- Policy – tourism development, sustainable development, conservation issues, land-use, parks/protected areas
- Social Context – population profiles, community structures, socio-economic situation, political stability
- Market Structure – tourism offerings, overall demand, key organizational structures

What's Needed to Get Started:

Information	Use	Potential Source
<i>Geography, Climate, Topography</i>	Planning logistics, and understanding of physical attributes that may relate to tourism attractions and activities	Internet, Travel Guide Books, Topographical Maps, National Tourism Board Information
<i>Socio-Economic, Political, and Cultural Context</i>	Defining the general context within which the team will be working	World Bank Socio-Economic Indicators, Government Websites, US State Department Websites, World Bank and UN country profiles and strategies, Travel Guide Books, newspapers, journal, and magazine articles, history books
<i>Tourism Policies, Master Plans, and Marketing Strategies</i>	Understanding of government strategic approach to tourism development	World Tourism Organization publications, government investment promotion websites, tourism board or ministry websites
<i>Environmental, Biodiversity, and Natural Resource Use Issues</i>	Preliminary understanding of priority conservation, land and resource use issues	CI's country profiles (www.cepf.org), CI's Hotspots (www.biodiversityhotspots.org), IUCN Listing of endangered and vulnerable species (www.iucn.org), World Wildlife Fund, The Nature Conservancy, Natural Resource and Protected Area Management Plans – check National Park Administration, Forestry Dept. and Environmental Ministries websites
<i>Market Structures</i>	General understanding of existing tourism plant, key market segments, products offered, and overall trends	World Tourism Organization statistical references, government websites, travel guide books, tourism and hospitality management publications, local tourism association websites
<i>General Institutional Support</i>	List organizations currently involved in tourism development	Government Ministries, National Tourism Boards or Administration, Park and Wildlife Services, Local tourism association websites, George Washington University Donor Database



ASSESSMENTS & STAKEHOLDER ENGAGEMENT - FIELD WORK

- **TWO STEP Process**
 1. Involving local stakeholders in the assessment process
 2. Conducting the actual assessments

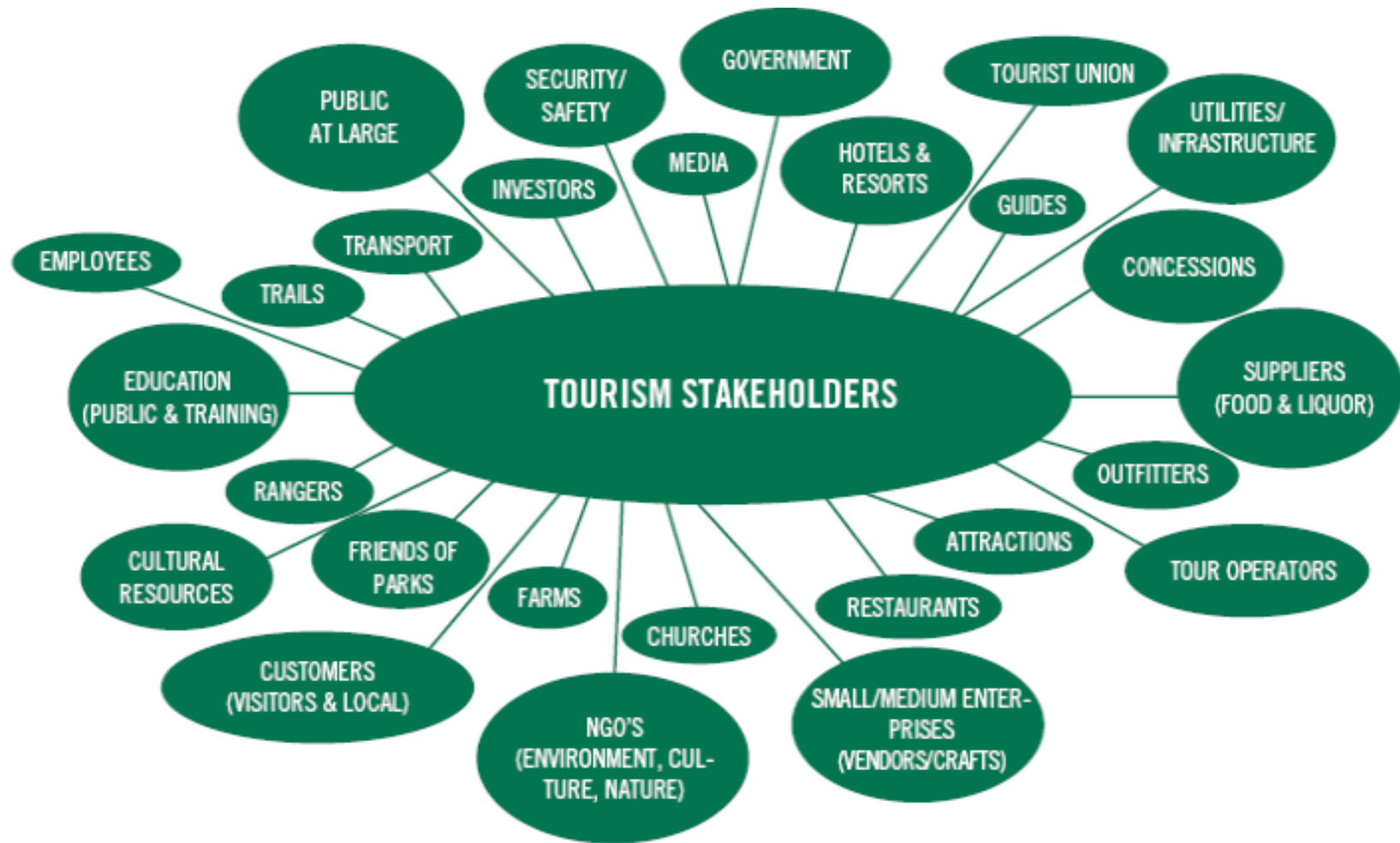


GET FOLKS INVOLVED WHERE THE RUBBER HITS THE ROAD!!

- Local Stakeholder participation
- Help carry out assessments
- Understanding of community priorities & concerns
- Identify key partners and effected groups
- Promote “buy-in”
- Methods:
 - Workshops/Training
 - Consultations
 - Public Meetings



TOURISM STAKEHOLDERS



PARTICIPATORY APPROACHES

- SWOT analysis
- Focus Groups
- *Future Search*
- CAFÉ
- Secret Shopper
- Others?



Tool: SWOT Analysis:

ASSESSMENT COMPONENTS

- Attractions Inventory
- Site & Infrastructure Analysis
- Market Demand Analysis
- Supply & Competitive Analysis
- Socio-Cultural & Natural Resource Use
- Human & Institutional Capacity Assessment
- Environmental Footprint
- Cost Benefit Analysis



ATTRACTIONS INVENTORY

Demand for a destination is determined by a number of factors:

- Number and DRAW of attractions – tangible & intangible.
- Natural attractions, Cultural attractions, Historic and Heritage attractions, Recreational activities

Recreational activities Name, description, and current draw	Describe best areas for activities to take place	Level of difficulty	Product development needs	Environmental FRAGILITY	Socio-cultural concerns (i.e. traditional uses and beliefs, taboos, potential disruption, land-tenure issues)	Choose potential market draw
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ATTRACTIONS INVENTORY STEPS

List attractions (this is the fun part!)

Map Attractions (caution here!)

Rank and Evaluate Attractions (its not personal!)

- *Uniqueness*
- *Aesthetic or Scenic*
- *Biodiversity*
- *Cultural Value*
- *Historical Value*
- *Uses and activities*
- *Community Participation*
- *Access*
- *Product Development Needs*

SITE AND INFRASTRUCTURE ANALYSIS

Besides attractions, several other factors become critical in supporting tourism visitation to an area.

- Transportation Services
- Accessibility Summary
- Public Services
- Evaluation of Surroundings

MARKET DEMAND ANALYSIS

Tourism needs to be demand driven!

- Is the development going to provide value to the tourist?
- Is the development going to provide value to the community
- What are the potential markets and their size?

Pass Through

On vacation and just passing through the area.

Avoid stopping.

Touring

On vacation, stay in 3 or more locations in the area.

Unplanned, spontaneous, impulse location choices.

Visiting

Visiting friends and/or relatives.

Family and friends influence choices.

Destination

On vacation, stay in 2 or less locations in the area.

Use tour operators and other advertising to plan trip.

CREATING TOURISM PRODUCTS FOR SPECIFIC VISITOR MARKET SEGMENTS

- Understanding tourism resources
- Types of tourism resources
- Resource evaluation
- Identifying, understanding and selecting the tourist
- How do we get them?
 - ✓ Development Plan
 - ✓ Marketing Plan
- Data on multi-state size visitor market segments: visitors and expenditures

SUPPLY AND COMPETITIVE ANALYSIS

- What is the current local tourism reality?
 - ✓ Supply-side Tourism
- How is it functioning?
 - ✓ Ask the industry
- The Competition
 - ✓ Are we competitive?

GAINING AND MAINTAINING COMPETITIVENESS

- Identification of competitors for visitors
- Competitive profiles: location, attraction/lodging/foodservice capacities
- Visitor market segments served
- Quality of visitor access: highways, byways, airports, intercity bus service, rail service
- Tribal market share of segment demand
- Visitors' sources of information: media, guidebooks, friends/relatives, Internet
- Positioning with marketing intermediaries and facilitators
- Growth/decline of demand for competitors

SOCIO-ECONOMIC & NATURAL USE ANALYSIS

- Don't build what no one wants
- Three Methods

1. Community Mapping

Tool: How to Conduct Community Mapping:

2. Stakeholder Analysis

Tool: How to Conduct a Stakeholder Focus Group:

3. Resident Attitude Surveys

IMPROVING RESIDENTS' QUALITY OF LIFE

- Resident attitudes towards visitors
- Resident jobs in tourism industries
- Income/wage levels
- Seasonality of employment
- Personal income generated by visitor activities
- Resident attitudes toward additional development
- Visitor-related crime/vandalism

HUMAN & INSTITUTIONAL CAPACITY ASSESSMENT

- People, people, people!
 1. Map Available Human Resources
 2. Labor Market Profile
 3. Compare Forecasted Needs to Labor Market Realities
 4. Assess Institutional Support



Guides and Toolkits Series

Guide to Designing Tourism Workforce Development Programs

With a special focus on job and career opportunities for youth



Educational Quality Improvement Program 3

Engaging and Preparing Youth for Work, Civil Society, and Family Life

TOOLKIT IS INTENDED TO:

- ❖ Strengthen the capacity of managers (from government, NGO's and the private sector) to assess, design, implement and evaluate workforce development programs in the Tourism sector
- ❖ For use by destinations seeking to build a sustainable Tourism sector that provides jobs and economic growth while at the same time practicing sustainable approaches to natural resource management
- ❖ For destinations with large youth populations where developing viable employment opportunities for in-school and out-of-school is a national priority.



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ASSESSING TOURISM'S ENVIRONMENTAL FOOTPRINT

- Tourism Can...
 - Provide Financing for Conservation
 - Establish Economic Alternatives
 - Foster Constituency Building
 - Be an Impetus for Private Conservation

ASSESSING TOURISM'S ENVIRONMENTAL FOOTPRINT

- Tourism can...
 - Provide Financing for Conservation
 - Establish Economic Alternatives
 - Foster Constituency Building
 - Be an impetus for Private Conservation
- Ask the Experts!

ASSESSING TOURISM'S ENVIRONMENTAL FOOTPRINT

Type	Potential Impacts	Potential Opportunity and Key Assumptions	Key Groups Stakeholders Involved or Affected	Expert/ Person(s) to Contact	Potential for Impact
Agricultural encroachment into unprotected forest reserve	Tourism Development might increase demand for agricultural products, provide income for agricultural technology – increasing farming.	Ecotourism may provide rationale for creating a protected area, could provide incentives for organic and sustainable agriculture, etc. Economic justification for establishing Protected Area will be strong enough, the right community cultural/historical context exists in favor of Protected Area's.	Local Ecotourism Associations Community Members Government Ministry and Official		

COST BENEFIT ANALYSIS

- Determining priorities?
- Weigh ***measurable*** benefits and costs (such as market demand and necessary infrastructure investment costs)
- Consider ***immeasurable*** benefits and costs (such as potential socio-cultural conflicts and benefits to culture/nature).

VISIONING & STRATEGIC PLANNING

- Plan development based on:
 - Findings from previous stages
 - Conversations with stakeholders
 - Visioning and surveys – residents, tour operators, visitors, business owners
- Tool: Tourism Destination Visioning Exercise:



PRESENTATION OF RESULTS: REPORTING & FEEDBACK

- Conclusions, Recommendations & Next Steps
 - Report on results & solicit feedback from stakeholders
 - Identification of champions to move projects forward
 - Identification & allocation of potential resources
 - Pursue “Low hanging fruit” & quick wins
 - Planning next steps—Short and mid term

TOURISM ASSESSMENT TOOLKIT



Tourism,
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A Tourism
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CROW TOURISM STRATEGIC PLAN



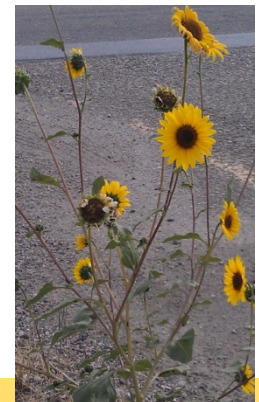
CURRENT SITUATION

- Tourists passing through:
 - Little Bighorn National Battlefield is the most prominently known landmark in Crow
 - Low visitation in winter months
 - Crow maintains concession with NPS for tours
- Lack of infrastructure on Crow Land
 - No hotels, few restaurants, outfitters, guides, etc



TOURISM AS PRIORITY FOR CROW

- Chairman designates tourism development in Crow as High Priority
 - Crow awarded grant from **Native American Business Development Institute at BIA**
 - George Washington University asked to support Crow in tourism planning



OBJECTIVE

- Engaging local stakeholders to develop a comprehensive strategy for tourism that **promotes** the natural and cultural assets of the Crow Nation while maximizing the benefits to its people.



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DESTINATION REVIEW

- Analysis of the physical, social, policy and tourism industry situation.
 - Governance (tourism and cultural/natural site management policies and strategies)
 - Economic (tourism product development, marketing, and trade)
 - Social (listen to leaders of the Crow's rich and vibrant communities)
 - Environmental (the most appropriate cultural/natural resource friendly systems, technologies, and practices for the specific tourism practices, services or other kinds of issues).



ASSESSMENT PROCESS & STAKEHOLDER ENGAGEMENT

- Inventory of available resources for tourism development within the Crow Nation (including cultural, heritage, natural, and festivals, etc.).
- Analysis of “readiness” of the resource & tourism draw.
- Review of potential markets and recommendations for enhancement



VISIONING & STRATEGIC PLANNING

- Plan development based on:
 - Findings from previous stages
 - Conversations with stakeholders
 - Surveys – residents, tour operators, visitors,



FINDINGS

- Destination Crow DMO
- Workforce Development Support
 - Business Skills
 - Tourism, Event, Hospitality Training
 - Entrepreneurship
- Product Development Support
- Access to Financing



DESTINATION CROW

- Destination Management Organization
 - Coordinate stakeholders and Promote the Crow Nation as a Destination
 - Provide Management Services to Local Businesses and Entrepreneurs
 - Serve as an Incubator for Small Businesses and Entrepreneurs
 - Preserve and Improve the Unique Aspects of the Area



Product Development



- **Survey suggested focus on 3 Key Activities**
 - **Guided Tours**
 - **Exhibition of Traditional Ceremonies**
 - **Sale of Handicrafts**
- **Maintain Authenticity**
- **Target Marketing By Region**

Workforce Development

- **Add formal hospitality/tourism/event training at Little Big Horn College**
- **Small business skills support**
- **Product development workshops**
- **Develop a network of trained guides to lead on site tours**



THANK YOU

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The Role of Public-Private
Partnerships and the Third
Sector in Conserving
Heritage Buildings, Sites,
and Historic Urban Areas

Research Report

Susan Macdonald
and Caroline Cheong



The Getty Conservation Institute