



***Rhode Island
Tourism Strategic Plan
Summary of Key Findings
December 2010***

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1.0 Study Purpose and Study Team Composition

In early 2010, the state of Rhode Island and the Rhode Island Economic Development Corporation (RIEDC) launched a five year strategic planning process to help guide and maximize the potential of its broad visitor industry. After an extensive review process, the RIEDC selected the nationally recognized team of The Radcliffe Company and Nichols Tourism Group to lead the process. Through the year, a broad range of industry representatives, political leaders and RIEDC staff provided input and helped refine findings and recommendations.

This document summarizes the findings and recommendations of the effort. Two additional presentation documents supplement this summary and provide additional detail. The first, *Rhode Island Tourism Strategic Plan—State of the Industry*, presents much of the research and analysis that helped identify the critical strategic issues which provide the foundation for the plan. The second, *Rhode Island Tourism Strategic Plan—Strategic Recommendations*, provides detail on the mission, goals, objectives and tactics to move the plan forward.

1.1 Study Team Composition

The Radcliffe Company and Nichols Tourism Group (TRC/NTG) team has worked cooperatively for many years and have extensive experience in helping guide destinations in strategic planning initiatives.

David Radcliffe established TRC in 2001, as a multi-dimensional hospitality-related consulting firm after 26 years in convention bureau management. For 14 of those years, Mr. Radcliffe led the nonprofit Greater Phoenix Convention and Visitors Bureau as its President and CEO, earning an international reputation for his innovative leadership and management capability in every aspect of destination marketing and management.

NTG is a national leader in providing strategic planning, marketing and research services to the travel and tourism industry. Established in 1996, the firm has completed an extensive array of detailed strategic planning services for clients ranging from convention and visitor bureaus (CVBs), state tourism offices, county destination management organizations (DMOs), regional tourism promoters, Native American tribes, the United States Forest Service and numerous private developers. NTG’s tourism strategy projects have involved work from Alaska to Mexico.



1.2 Report Format

Following the introduction, Section 2 of the report presents a review of key findings from the State of the Industry portions of the analysis. A variety of critical issues were prioritized in this portion of the planning process, laying the foundation for the strategic recommendations of the plan. Section 3 outlines key strategic elements of the plan including a new five year mission statement, four goal tracks and a mix of associated objectives and tactics.

As previously noted, this summary document provides key findings from this analysis and the accompanying presentation documents provide significant additional documentation and detail as to these findings and recommendations .

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2.0 Study Process and State of the Industry Findings

The planning process was initiated with the development of a Study Advisory Committee (SAC) who was responsible for direction, review and oversight of the project. After an initial meeting with the Committee, a series of public input sessions were held to gather thoughts, direction and concerns of the broad industry and political leaders. Over 140 individuals participated in the input sessions and provided important insight as to past and current issues facing the Rhode Island visitor industry. This input was supplemented with a variety of individual interviews with industry and political leaders from around the state.

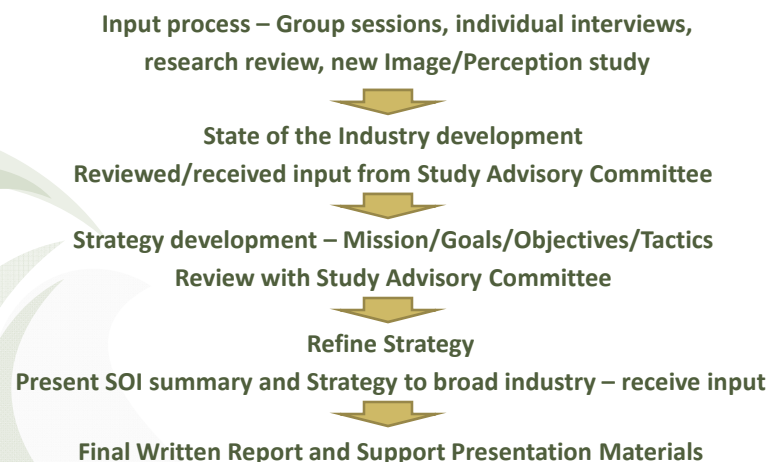
A wide range of existing research was then assembled and reviewed to build on the input received through the input process. This research included materials not only from the state and RIEDC, but also from regional DMO's and a number of tourism related entities around the state.

In addition to existing research, a new image and perception study was undertaken to gain insight as to how residents in key Rhode Island feeder markets viewed the state, particularly in regards to other competitive alternatives. TRC/NTG team worked in association with Temple University and their National Laboratory for Tourism and eCommerce (NLTeC) in the development and implementation of the survey. Findings from these efforts were integrated into a State of the Industry presentation which was reviewed and tested with the SAC.

Using feedback from the SAC, TRC/NTG moved into development of the strategy formulation portions of the study. A mission statement was developed, along with goal tracks and a wide range of associated objectives and tactics. Again, these draft findings were reviewed and tested with the SAC.

Feedback from the SAC was incorporated and key State of the Industry and Strategy elements were presented to the public in an additional input session. A final strategic plan was refined and this document provides key findings from the effort.

Strategic Planning Process



2.1 Industry Performance

The visitor industry in Rhode Island is a key economic cluster, generating \$3.4 billion of state spending in 2009. While most residents of the state are largely unaware of the role the industry plays, it supports almost 10% of the jobs in Rhode Island and 9% of its tax base. Important any time, but especially during periods of economic challenges, the industry can be a key element in the state's recovery as for every 163 new visitors attracted to the state, a new job is supported.

While clearly an important industry sector, Rhode Island was more heavily impacted as the national economy declined in 2008. While the decline was more moderate in 2009, the real issue will be how does the state move forward in coming years and is it positioned to compete as the broad range of New England states strive to convince prospects to chose destinations other than Rhode Island.

2.2 Rhode Island Customers

Similar to many states around the country, Rhode Island attracts 70 percent of its visitors from its own residents and just five other states. New York, Massachusetts and Connecticut generate approximately one-half of all the state's visitors, with visitors from New Jersey, Pennsylvania and Rhode Island accounting for another 20 percent.

In order to better understand the perceptions and images of residents in key feeder markets, the following three Metropolitan Statistical Areas (MSAs) were utilized in survey:

- ◆ Boston-Cambridge-Quincy, MA-NH MSA
- ◆ New York - Northern New Jersey - Long Island, NY,NJ,PA MSA
- ◆ Hartford- West Hartford - East Hartford - CT MSA

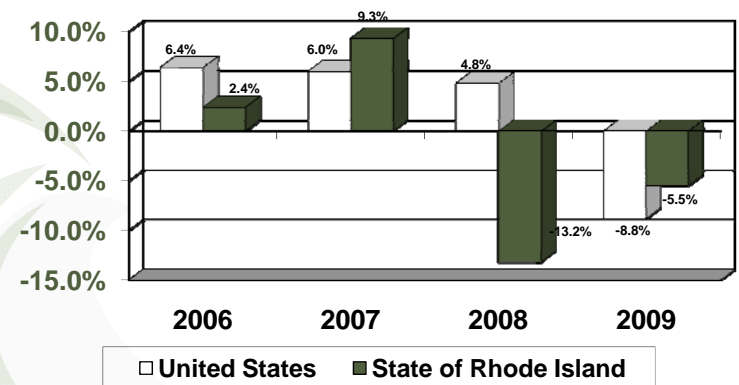
Impacts of Rhode Island's 2009 Visitor Industry

1. Visitor spending injected \$3.4 billion into Rhode Island's economy.
2. The visitor industry supported 42,000 direct and indirect jobs in Rhode Island – 9.2 % of the state's total job base.
3. These visitors provided \$921 million of federal, state and local taxes and made up 8.9% of the state's tax base.
4. If tourism didn't exist in Rhode Island, each household would have to pay \$1349 more in taxes to maintain the current level of state and local tax receipts.
5. Tourism can be a key stimulator in Rhode Island's economic recovery – for every 163 new visitors attracted, a new job can be supported.

Source: Global Insight Inc.

Rhode Island in Context

Direct Travel Spending



Most respondents were familiar with Rhode Island, with over 2/3rds actually visiting the state in the past. Possibly even more important, 62 percent of these visitors were repeat travelers, coming multiple times to the state. Like any good business, maintaining connection with these existing customers is of key importance.

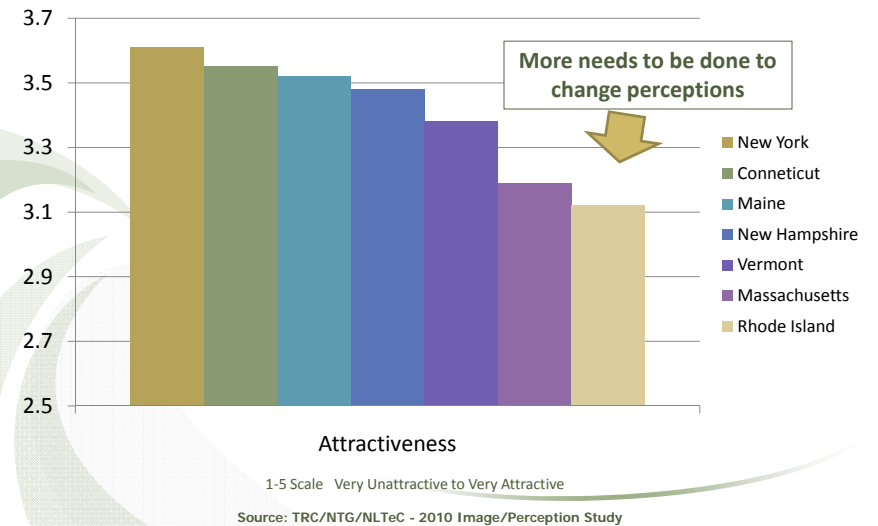
While the survey demonstrated strong awareness of the state, it also identified how other regional competitors were more frequently associated with key destination perceptions. Rhode Island was last among the seven competitive state set when ranked on attractiveness. Additionally, when asked about important destination feelings like relaxing, friendly, beautiful or diverse, Rhode Island ranked near or at the bottom.

While concerning, these findings were not surprising, as most of the competitors possess state marketing resources that far surpass that of Rhode Island. As discussed more fully through this report, even though Rhode Island possesses strong attributes, these other competitors have been able to successfully dominate images in prospective visitor's minds

An additional concerning factor that came out of the input sessions and individual interviews was that many of the state's own residents don't understand or appreciate the visitor related assets in their own backyard. This is particularly important as these Rhode Island residents are not only an important source of visitation for the state, they are also key in driving out of state visitation. The survey found that visiting friends and relatives was the second most frequently noted reason for traveling to Rhode Island, accounting for almost 1/3rd of the visitors.

Additional background on these findings can be found in the State of the Industry presentation, but three critical issues noted in the accompanying slide are of key importance in future strategic priorities.

How Attractive Is



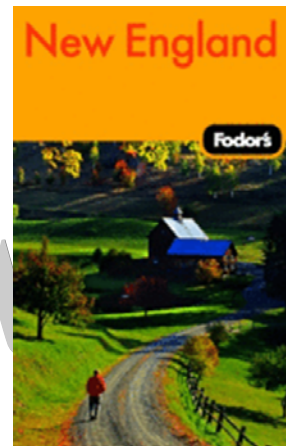
Critical Issues – Customers

1. **New steps should be taken to maximize the value of existing Rhode Island state visitors – think customer equity**
2. **Increased initiatives must be launched that reinforce desired perceptions and attitudes in prospective visitors, drive new brand initiatives recognizing must be much more than a “slogan”**
3. **Rhode Island must balance initiatives to both drive out of state visitor demand, while minimizing in-state resident leakage to other non-Rhode Island destinations**

2.3 Rhode Island Products

Like many other states around the country, Rhode Island recognizes it not only has a role of marketing the state, it must also play a proactive role in ensuring its existing products are maximized and new products that could enhance the destination appeal of the state are attracted.

Rhode Island is blessed with a broad diversity of products and this diversity is recognized when outside travel guides like Fodor's characterize the state. This diversity is a strength, but can also be a weakness as there is no one major product group that defines the state and many of the other New England competitors possess many of the same assets.



"A Rhode Island getaway can encompass historic tours, visits to galleries, and fine dining in Providence; apple picking and canal boat rides in Blackstone Valley; boating and beaching in South County or Block Island, biking in East Bay; and sunset sails and gilded mansions in Newport."

There were clear product images noted by survey respondents when asked about what first came to mind when thinking about Rhode Island. The top five responses were; Beach/Water, Newport, Small, Providence and Mansions. While these are strong perceptions, competitive states were more frequently associated with key product offerings. Although Rhode Island came in 3rd in association with beach and waterfront assets, it came in near the bottom when respondents were asked which destinations they associated with product attributes like boating, historic sites, National /State parks or festivals and fairs. Again, this is not to say that Rhode Island does not possess strong products, but too often these prospective visitors view other competitive destinations as possessing more attractive offerings.

In many instances, the opportunity given this competitive challenge is to combine these dispersed product offerings in ways that speak to targeted niche customer segments. The visitor who desires a great outdoor recreation experience is often also desirous of a stimulating heritage offering and a great culinary encounter. Rhode Island can increasingly compete by linking and integrating its diverse product mix in ways that are difficult, if not impossible, for competitors to match.

Today's visitors are also increasingly looking for true engaging experiences when they come to a visitor attraction. As many of the state's products are natural and heritage based, it is important that they are not presented as a static offering, but rather that the stories and history are "served up." Tech-

The image is a screenshot of a website titled "Inside Yellowstone Podcasts". The header includes the title and a subtitle "Short Videos on Park Features & Processes". Below the header are navigation links: "Yellowstone Home", "Photos & Multimedia", "List of Videos", and "Videos Map". The main content area features a photograph of a person holding a smartphone displaying a video of a stone archway. To the right of the photo is promotional text: "Now you can watch Inside Yellowstone videos in iTunes or on your iPod. You can even bring them into the park to watch these programs on location, making them our first multimedia wayside exhibits. Be sure to get your podcast map below!".

nology can be an important answer, whether engaging the visitor through MP3 downloads, videos, games or first hand explanations of how to visit.

Rhode Island must also focus on assets that have the potential to inspire and drive visitation. Iconic images like state lighthouses, mansions and beach environments are particularly powerful, but must be integrated with other unique Rhode Island products to further differentiate them from offerings in other competitive destinations. These integrated, powerful drivers should then be used to stimulate the travel decision, and once in the state, the visitors can then be dispersed to the broad range of other travel experiences that are available.

Collectively, three product related critical issues arose from the analysis and are noted in the accompanying slide. Specific objectives and tactics will be noted later that speak to how to address these issues.

2.4 Rhode Island Delivery Systems

Delivery systems relate to the variety of elements that help get visitors to choose and get to Rhode Island. One of the most important set of elements are the organizations charged with connecting with prospective visitors and helping them understand the destination. In most states around the country, a state tourism entity takes the lead in setting a state-wide brand and image. This role is critical in helping prospective visitors understand the overall destination and how it differs from other competitors. In Rhode Island's case, the RIEDC and its Tourism Agency has historically had a very moderate budget and as it is funded annually through a General Fund allocation, its available resources have varied greatly.

When considering budgets from fiscal year 2008, the period prior to the undertaking of the Image and Perception Study, it is easy to see why other competitive states were more prominent

Critical Issues – Products

- > Rhode Island's diverse product offerings must be both individually highlighted and cooperatively integrated – the small geographic size of the state enhances this opportunity.
- > New ways to engage visitors and provide true product experiences must be embraced – use integrated experiences to build off season opportunities.
- > Particular focus should be placed on products that can serve as drivers – then disperse throughout the state.

Budget Comparisons - Clear Reason Others More Prominent

New England Region State FY 08 Budgets and Increase from FY 07

Massachusetts	\$11,765,000	+39.3%
Maine	\$ 8,530,000	+12.9%
Connecticut	\$ 7,101,000	+35.2%
New Hampshire	\$ 5,731,000	+5.4%
Vermont	\$ 3,929,000	-22.8%
Rhode Island	\$ 1,429,000	- 2.9%

FY 08 state average \$17.3 million

Source: TIA FY08 State Tourism Office Survey

in prospective visitor's minds. In many instances these competitors are committing 2 to 8 times the resources of Rhode Island.

By default, much of this statewide marketing and positioning responsibility has fallen to the seven regional DMOs around the state. Like most other state's around the country, these regional DMOs play a critical role in presenting the unique experiences in their individual regions. This specialized understanding is increasingly being demanded by visitors who desire assistance by entities and persons who know the destination intimately. If these visitors are only given a broad characterization of an area and connect with representatives that can only give a cursory overview, they will frequently choose another state or destination. Thus, both a strong state organization and supportive regional DMOs is a model used by most strategic states around the country.

FY 09 RI State DMO Funding Allocation

State DMOs	\$6,725,343	90%
RIEDC-Tourism	\$711,000	10%
Total	\$7,436,343	100%

Source: RIEDC

These state resources have continued to drop and in fiscal year 2009, only \$711,000 was available to market the state, approximately 10 percent of the overall resources Rhode Island committed to marketing. Looking forward, it will be critical that alternatives are investigated that could provide new resources at a state level, while keeping the regional DMOs strong and maximizing their effectiveness.



Rhode Island's small size is a great competitive advantage as visitors can easily move around the state and see many of its diverse offerings. However, too often a visitor arrives at one Rhode Island destination and little cross-selling of other powerful assets occur. New technologies should be increasingly utilized that help the visitor understand how to get around the state and how varying products and areas relate to each other. New mapping technologies, mobile smart phone applications, and downloadable guides are increasingly being utilized as an "Electronic Concierge," essentially helping a visitor understand, navigate and maximize their visitor experience. Rhode Island and its DMOs must increasingly utilize these types of resources and exploit the competitive size advantage that Rhode Island possesses.

One of the key challenges that faces not only Rhode Island, but many states around the country, is the lack of understanding by leaders and residents of the role the visitor industry plays in the economic and quality of life fabric of a state. While RIEDC has done an impressive job using cutting edge research to estimate the economic impacts of the industry, more must be done to communicate how the visitor industry impacts the state. Whether in expanding the state's job base, importing new spending, introducing new businesses leaders or expanding the quality of life attributes all Rhode Island residents appreciate, this type of industry advocacy must take on a higher level of importance. All too often, the visitor industry waits until it is facing a crisis before it comes together and proactively advocates on behalf of the industry. To be more effective, these efforts must take place in both good times and bad.

A variety of delivery system critical issues should thus be addressed in the strategy that speak to resource, technology and advocacy factors.

2.5 Rhode Island Competition

In any strategic planning process, the broader competitive environment must be considered. The Image and Perception Survey highlighted a number of competitive challenges facing Rhode Island. In most instances, these competitive destinations rated significantly higher whether a respondent was noting destinations they perceived as peaceful, relaxing, friendly or beautiful.

Findings from this research should be used to bring heightened awareness of the external challenges facing the state and the lost opportunities that Rhode Island will cede to other competitors if an internal cooperative spirit is not embraced. Rather than thinking of the competitor as the community a few miles down the road, the real competitive threat posed by external states must be recognized and used as the “glue” to stimulate new thinking on how communities and products can integrate together and make collective offerings stronger.

In some instances, like marketing to the international markets, Rhode Island competitors can at the same time be allies and cooperative efforts to target such regions can make great sense. Discover New England is a clear example where cooperative initiatives effectively leverage limited resources and maximize penetration for all parties. Similar opportunities should be considered in targeting other niche markets and when teaming with a competitive state can enhance the collective offering, proactive steps should be taken.

Possibly most important, a clear understanding of the marketing

Critical Issues – Delivery Systems

- Use of State bed tax resources should be refined in ways that both expand the resources at a state level, while reinforcing the cooperative spirit across the state.
- Rhode Island state should utilize leading edge technology in its marketing initiatives and fulfillment collateral.
- Key tourism infrastructure including way-finding, signage, and other visitor flow management initiatives must be addressed – make travel part of the overall experience.
- Initiatives relating to industry advocacy must be pursued in both good times and bad.

Other New England Competitors Have Planted Their Flag



Peaceful
Maine 1, Vermont 2, New Hampshire 3, Rhode Island 7



Relaxing
Maine 1, Vermont 2, New Hampshire 3, Rhode Island 7



Friendly
Maine 1, New Hampshire 3, Vermont 4, Rhode Island 7

Beautiful
Maine 1, Vermont 2, New Hampshire 3, Rhode Island 7

and promotional resources being dedicated by these external competitors must be kept top of mind. Rhode Island is not operating in a vacuum and as these external competitors pull market share from Rhode Island, economic and job opportunities will be lost in a cluster that the state has clear advantages.

As new branding initiatives are launched and if new resources can be secured that allow Rhode Island to become more prominent in prospects minds, similar survey initiatives should be repeated to evaluate progress in changing these images and perceptions.

Critical Issues – Competition

- **Competitive strides by external competitors must be tracked and communicated to build industry commitment and drive internal state cooperation.**
- **Rhode Island should pursue cooperative opportunities with external competitors when it helps attract targeted audiences.**
- **The identification of new resources will be critical to effectively reposition Rhode Island in the minds of external prospects**

Dr

3.0 Strategic Recommendations

Building off of the critical issues identified in the State of the Industry portions of the study, the TRC/NTG team, in association with the Advisory Committee, developed a strategic framework to guide the state over the coming five year period of time. This framework started with a clear Mission Statement and developed four principal goal tracks, with associated objectives and tactics. Through the implementation of the plan, Rhode Island will enhance its potential to maximize its competitive advantage and expand the power of its collective visitor industry.

3.1 Mission Statement

A concise mission statement was crafted specifically recognizing how success enhances the visitor industry and the general business community, while aligning the tourism industry with increased quality of life amenities benefiting all Rhode Island residents.

“To attract the type of visitor spending that results in sustainable and significant economic and quality of life benefits for Rhode Island state businesses and residents.”

The mission statement thus reinforces the position that visitor generated spending translates not only into jobs and increased public tax resources, but also can be a critical element in expanding the range and depth of quality of life amenities that are appreciated by all those who call Rhode Island home.

3.2 Goal Tracks

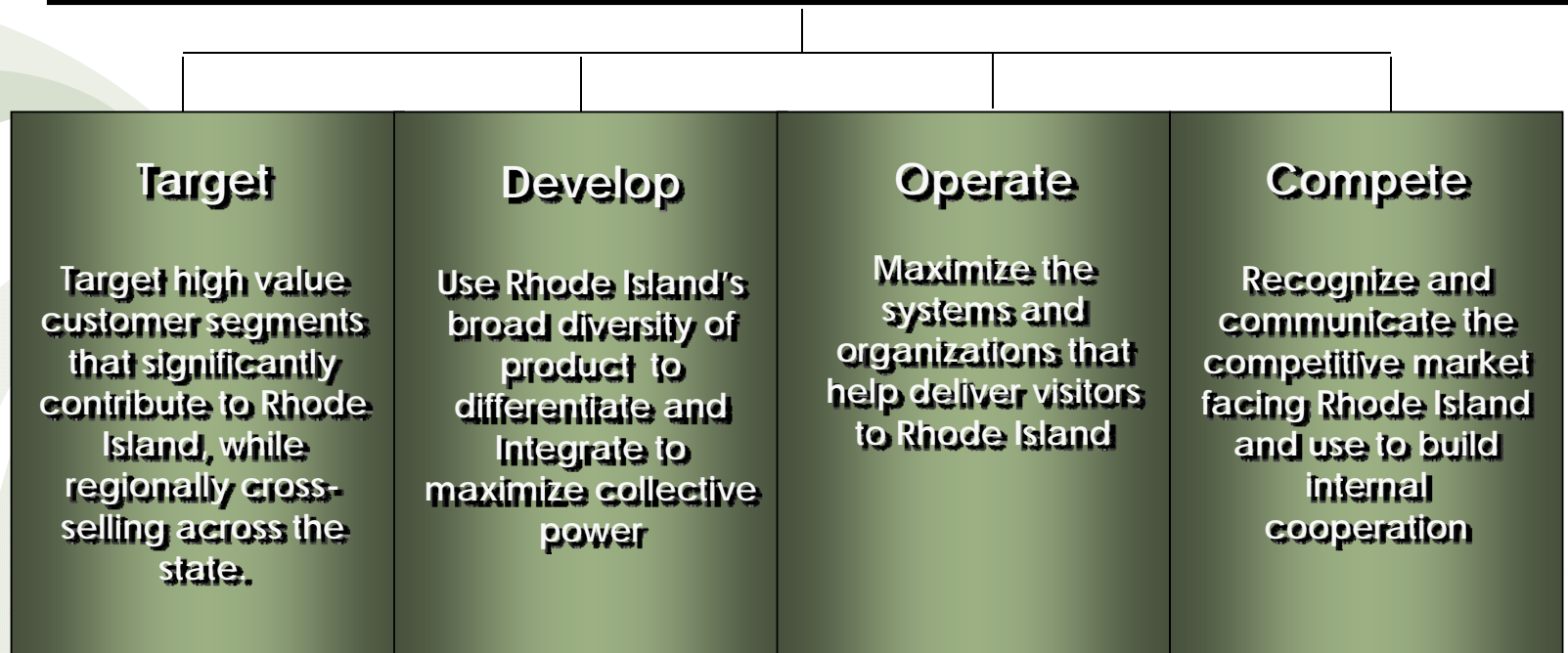
There are four goal tracks associated with the strategic plan: Target, Develop, Operate and Compete. These multiple goal tracks recognize that it is critical the industry address a range of initiatives that go beyond just marketing the state. Each of the goal tracks reinforce each other and in conjunction, will help the state maximize the collective power of this important economic cluster.



Mission and Goals

Mission

To attract the type of visitor spending that results in sustainable and significant economic and quality of life benefits for Rhode Island state businesses and residents.



3.3 Target Goal Track

Identify, target and build rapport with high value customer segments that contribute to Rhode Island, while expanding direct efforts to regionally cross-sell visitors across the state.

In order to move forward on the Target Goal Track, the state must focus on five primary objectives and the associated tactics as noted in Table 3-1. The table also notes who should take primary or secondary leads in tactic implementation, as well as the timeframe each tactic (*Near Years 1-2/ Mid Years 2-3/ Long Years 4-5.*)

**Table 3-1
Goal Track - Target**

	Organizational Responsibility			Implementation Timeframe		
	RIEDC	DMOs	Industry	Near	Mid	Long
Objective 1 - Build Brand Identity						
Tactic 1 - Use Image/Perception study to craft new RI brand	P			X	X	X
Tactic 2 - Engage industry to reinforce brand platform	S	P	P		X	X
Objective 2 - Maintain International Presence						
Tactic 1 - Use PR to distribute brand messaging	P			X	X	X
Tactic 2 - Seek partners internally and externally	P			X	X	X
Objective 3 - Deepen Existing Customer Relationships						
Tactic 1 - Use existing op-in databases to motivate repeat travel	P	S			X	X
Tactic 2 - Expand understanding of RI products among residents	P	P		X	X	X
Tactic 3 - Use website and PR to reach and motivate RI residents	P	S			X	X
Tactic 4 - Motivate RI residents to attract VRF markets	P	S	S		X	X
Tactic 5 - Develop regionally cooperative initiatives by season	S	P	S	X	X	X
Objective 4 - Expand cooperative in-state marketing efforts						
Tactic 1 - Prioritize cross-selling product themes	P	P			X	X
Tactic 2 - Use multiple channels to access existing customers	P	S			X	X
Tactic 3 - Develop cooperative programs that integrate new brand and product themes	P	S	S		X	X
Objective 5 - Build on Geotourism principles						
Tactic 1 - Use geotourism principles to link RI product themes and experiences	P	S			X	X
Tactic 2 - Build full range of electronic vehicles to deliver messaging to all segments	P	S			X	X

P: Primary Role

S: Secondary Role

Target Objective 1- Build Brand Identity

It is of critical importance that the state work to build its unique brand identity in the minds of both existing and prospective visitors. RIEDC should take the lead in utilizing the findings of the image and perception study to craft a new brand platform for the state. This must be much more than the development of a new logo or slogan, and should reinforce desired perceptions and images in prospect's minds. The brand platform should incorporate themes, colors, images and messaging that help reinforce these targeted perceptions.

The Image and Perception study undertaken as part of this planning process provides important insights as to how visitors perceive Rhode Island in context of its key competitive set. These findings should be heavily utilized in helping formulate new branding initiatives and similar perception studies should be undertaken in future years to help evaluate the effectiveness on new branding efforts. As these brand elements are developed, it will be of critical importance that they are embraced not only state led marketing initiatives, but also in promotional activities of industry participants across the state. Thus ongoing outreach and education on the new brand elements will be key.

Target Objective 2- Maintain International Presence

Because of Rhode Island's unique geographic positioning between Boston and New York, maintaining a presence within the International markets should remain a priority. RIEDC has developed important partnerships through its long time affiliation with *Discover New England*. This is a viable and cost effective way to communicate and build relationships with prospective customers, utilizing the gateways to New England particularly from the European markets. Continued efforts to increase regional partnerships within the state to target these prospective customers should be maintained. Use of comprehensive public relations initiatives to deliver and distribute brand messaging and product information to all key overseas representatives and regional partners should continue and be expanded.

Target Objective 3 - Deepen Existing Customer Relationships

In light of the state's success with customers who have visited previously, it is essential to deploy specific initiatives to expand ongoing relationships with this important consumer segment. Specific promotions and communication should be targeted to all existing databases and messaging should be aligned with the new brand platform and promises. Commitments should be developed to expanding the database with new inquiries and deliver messaging electronically that support the branding themes and specific interest areas.

Because of the influence Rhode Island residents may have on important segments of the consumer market and repeat visitation, programs should be initiated that are designed to educate residents about integrated Rhode Island product experiences. Use of the state's website and internal public relations campaigns will be essential to engage residents in the process of "selling" the state to friends, relatives and business associates.

Target Objective 4– Expand Cooperative In-State Marketing Efforts

Rhode Island is blessed with a rich and diverse set of products and attractions within close proximity to one another, but too often these assets are not “served-up” in integrated ways that resonate with prospective visitors. Efforts to link and integrate these products and experiences should be pursued across all seven tourism regions of the state. As these integrated offerings are increasingly developed, the state should take advantage of the full range of regional intercept points or visitor centers to cross-sell these integrated experiences to the visitor and to maximize the impact of their visit by lengthening their stay or incenting a return visit. These integrated offerings should integrate and reinforce new branding initiatives whenever possible.

Target Objective 5 - Build on Geotourism Principles

Geotourism is defined as “*tourism that sustains or enhances the geographical character of a place—its environment, culture, aesthetics, heritage, and the well-being of its residents.*” Rhode Island was a leader in embracing Geotourism principles when it signed a Geotourism Charter with National Geographic in 2007. Rhode Island’s rich history and heritage, waterside attractions, activities and amenities, culinary experiences, mansions and natural beauty encompass many of the state’s Geotourism offerings. These assets, when linked, integrated and promoted within the context of the new brand platform, will allow Rhode Island to differentiate itself within the region. Because many of these attractions are similar to what other states offer within the competitive set, RIEDC and the partner DMOs must commit to co-promotion and cross-selling initiatives that use these themes as differentiating factors, while at the same time reinforcing important history and heritage of the state. Efforts to ensure that these experiences are integrated in creative ways is an important start, however, success will only be maximized when a full range of channels (print, web, MP3 downloads, smart tags, etc) are used to present these Geotourism assets to visitors.

3.4 Develop Goal Track

Proactively mold and direct Rhode Island products in a manner that maximizes the collective state’s appeal.

While the objectives and tactics outlined in the Target Goal Track focus on communicating and motivating visitors, the Develop Goal Track recognizes the industry must take proactive steps to ensure existing products are integrated in ways that increase their collective attraction power. Additionally, the industry must identify areas holding important potential for future development as well as incentive programs and tools that could help stimulate their ultimate development. Success in the develop track will be determined as progress is made towards addressing the three objects outlined in the following .

**Table 3-2
Goal Track - Develop**

	Organizational Responsibility			Implementation Timeframe		
	RIEDC	DMOs	Industry	Near	Mid	Long
Objective 1 - Link and Integrate RI products to differentiate the destination						
Tactic 1 - Establish statewide product development working group	P	S	S	X	X	
Tactic 2 - Regionally deploy and serve up product experiences locally		P	S		X	X
Objective 2 - Deepen the role of the web						
Tactic 1 - Build web content aligned with the outcomes of the product working group	P	S			X	X
Tactic 2 - Use full range of multi media techniques and social media to engage the visitor	P	S			X	X
Objective 3 - Craft incentive programs to enhance product development						
Tactic 1 - Cooperate with ED to develop funding for grant programs	P	S			X	X
Tactic 2 - Pursue initiatives with other agencies to fund future development efforts	P				X	X
Tactic 3 - Align product development with RI economic development objectives	P				X	X
P: Primary Role						
S: Secondary Role						

Target Objective 1 - Link and Integrate RI Products to Differentiate the Destination

RIEDC and the state’s seven tourism regions must cooperatively integrate the state’s tourism assets to maximize their collective appeal and expand the state’s identity as a viable, competitive destination. The establishment of a diverse state wide “*Product Development Working Group*” (PDWG) must be initiated that includes not only representatives from DMO community, but also senior level personal from the products themselves. Representatives of both the public and private sectors working together and hand in hand with the regional DMOs should help industry businesses collaborate on the development and execution of linked experiences that differentiate Rhode Island from the rest of New England. Outcomes of the group would be incorporated in marketing initiatives outlined in the previous goal track. The involvement of the products in this process is critical to help ensure what is promised in marketing initiatives is actually delivered on the ground.

As direction and concepts are developed through the statewide PDWG, a variety of regional working groups would also be developed that would help execute concepts at a local level. This would allow independence on how an individual region acted on concepts, while at the same time helping to ensure the broader state-wide opportunity was being embraced.

Ongoing efforts to identify and support other potential product development projects should be lead by the statewide working

group and RIEDC. Aligning potential development opportunities with other economic clusters to maximize potential synergies within RIEDC's overall strategy should be prioritized.

Target Objective 2 - Deepen the Role of the Web

Once the content and outcomes from the PDWG is assembled and aggregated, the state's web site and those of the seven regional DMOs, should be used to distribute the integrated offerings to unique online visitors. The sites should also be used to build compelling web content and deliver it through a cross section of various media platforms including videos, games and contests and social media. Through these channels, Rhode Island visitors should be stimulated to develop additional content sharing and posting their personal Rhode Island experiences.

Target Objective 3 - Craft Incentive Programs to Enhance Product Development

Competitive, long term success in building and attracting development that enhances Rhode Island's tourism industry will require concentrated efforts to identify tools and resources that can help stimulate potential projects and products. Unified efforts across the state must be developed to communicate with and convince legislative leadership on this economic development priority and ensure alignment with other economic development strategic objectives and targeted industries. Many competitor states have developed resources that stimulate and partner with other private sector resources to meet product development objectives.

3.5 Operate Goal Track

Maximize the systems and organizations that deliver visitors to Rhode Island.

There are five key objectives within the Operate track intended to maximize the efficiency and effectiveness of attracting visitors to the state. They recognize progress must be made on multiple fronts including:

- ◆ Increased and sustainable DMO funding,
- ◆ Expanded tracking of the impacts of the visitor industry,
- ◆ Enhanced advocacy for the overall visitor industry,
- ◆ Increased use of technology to help educate and distribute visitors , and
- ◆ Expanded tracking and performance measures to maximize DMO effectiveness.

**Table 3-3
Goal Track - Operate**

	Organizational Responsibility			Implementation Timeframe		
Objective 1 - Solidify long range funding for RIEDC's Tourism Dept. and all DMO's						
Tactic 1 - Maintain existing funding formula but require cooperative investments and accountability from all 7 regions.	P	S		X	X	X
Tactic 2 - Consider new occupancy tax on all short term vacation rentals - dedicate to RIEDC	P	S		X		
Tactic 3 - Consider additional .05 occupancy on hotel rooms - dedicate to RIEDC	P	S		X		
Tactic 4 - Consider pursuit of additional % of existing resources and dedicate to RIEDC	P	S		X		
Objective 2 - Build the economic case for RI tourism industry						
Tactic 1 - Expand quantitative research to substantiate economic value and ROI	P	S		X	X	X
Tactic 2 - Seek anecdotal evidence to put a qualitative face on the industry	P	S	S	X	X	X
Objective 3 - Develop advocacy strategy to ensure broad based support						
Tactic 1 - Use economic data and anecdotal evidence to "build the case"	S	P		X		
Tactic 2 - Educate stakeholders through grass roots industry campaign	S	P	S	X		
Tactic 3 - Develop programs to educate the general business community	S	P			X	X
Tactic 4 - Use PR to engage RI residents to support VFR and align with job generation	S	P	S		X	X
Objective 4 - Use "leading edge" technology and best practices to distribute products						
Tactic 1 - Expand technological initiatives to maximize customer connections	P	S			X	X
Tactic 2 - Use the web as the primary distribution vehicle - push the brand	P	S			X	X
Objective 5 - Maximize effectiveness and ROI on state resources						
Tactic 1 - Commit to market planning process engaging the tourism regions	P	S		X	X	X
Tactic 2 - Develop performance metrics for regions to maximize ROI	P	S		X		
Tactic 3 - Establish a minimum cooperative marketing investment from tourism regions	P	S		X	X	X
P: Primary Role						
S: Secondary Role						

Operate Objective 1 - Solidify Long Range Funding for RIEDC Tourism Dept and all DMOs

Competitive position and advantage for Rhode Island tourism is critically dependent on adequate, stable funding to advance the value of the industry as a primary economic development tool. Although a percentage of the current state transient room tax resources are allocated and dedicated to the seven tourism regions to manage and promote their destinations, the state's marketing resources allocated to RIEDC are dependent solely on a general fund appropriation by the state legislature. To maximize the effectiveness and solidify the leadership position for RIEDC, new dedicated resources from one or more sources must be se-

cured.

TRC/NTG strongly recommends that the existing state formula and distribution strategy for room taxes be maintained and that new resources be derived from a variety of prospective sources. The state's regional organizations are a key element in serving up the unique assets in their individual areas and visitors are demanding this local "perspective" as they make their travel decisions. A variety of prospective sources should be considered to provide RIEDC a more reasonable and stable level of funding. These could include the imposition of new occupancy taxes on vacation rental housing and all other temporary accommodations currently not being taxed, an increase in the state's bed tax levy, or an increase in the share of existing bed taxes that are currently reinvested in tourism marketing promotional efforts. These new resources should be dedicated via appropriate state legislation specifically to underwrite the state tourism marketing effort through RIEDC.

Operate Objective 2 - Build the Economic Case for the RI Tourism Industry

Ongoing research on the economic contribution tourism makes to the state's business vitality must be maintained and expanded to include all contributions to the quality of life in Rhode Island. This economic case must address not only the impacts of the overall visitor industry in Rhode Island, but also provide clear feedback on the effectiveness of resources the state provides to build the visitor industry. Efforts to collect quantitative data and information will assist RIEDC in building the case for tourism as a vital economic development channel and the role various organizations are having in building market share.

Because the industry is so broad and diverse, qualitative approaches should also be used focusing on anecdotal evidence that "puts a face" on the industry must be pursued. By highlighting local chefs, retailers, utility officials and others, the general public and public officials can become better aware of visitor industry impacts in fun, engaging ways.

Operate Objective 3 - Develop Advocacy Strategy to ensure Broad Based Support

As findings from Objective 2 are developed an ongoing advocacy strategy must be launched and maintained that communicates key themes and conclusions. These advocacy efforts should not just be a one time report or day at the legislature, but rather an ongoing series of communications efforts that helps ensure the value and role of the visitor industry is continually being brought to the forefront.

Success related to all tourism related initiatives is dependent on the development of critical constituencies of support among various stakeholder groups. Long range funding and product development initiatives will rely upon the support of these stakeholders. One of the first efforts should be with industry employers and employees through the development of a "grass roots" campaign to educate and motivate leaders and rank in file. Ongoing efforts should include a broad range of communication channels including email pushes, short videos and engaging print pieces that present economic data in ways that resonant with the general public. As the state's own residents gain a heightened awareness of the industry and visitor assets, they should also be engaged to be advocates of the industry.

Operate Objective 4 - Use Leading Edge Technology and Best Practices to Distribute Products

Expanding, developing and maintaining customer relationships are the cornerstones of any successful business enterprise in the 21st Century and Rhode Island Tourism is no exception. RIEDC must ensure that it acquires the technical capabilities to manage customer relationships and seek “leading edge” systems that allow for the electronic distribution of targeted brand and product messaging designed to motivate travel to the state. Digital marketing technologies and resources allow the RIEDC to “push” marketing messages to vertical leisure and group segments based on interest areas using the web, mobile apps or new mapping technology.

Operate Objective 5 - Maximize Effectiveness and ROI on State Resources

Acknowledging limited competitive marketing resources, Rhode Island DMO’s who benefit directly from state transient room taxes must collaborate and “pool” existing resources in an effort to maximize efficiencies and support a Rhode Island brand. To this end, RIEDC must engage in a comprehensive annual market planning process that engages the regions and establishes a minimum level of cooperative investments from each to support statewide programs and branding. These cooperative efforts combined with a new set of performance measures and metrics will allow RIEDC to monitor success and ensure return to the state. These cooperative programs and initiatives must also address the visitor experience and detail the responsibility of the regions in cross-selling statewide assets and experiences. Moreover, RIEDC must require that the partner organizations within the regions are equipped to deliver on the promises associated with the new brand.

3.6 Compete Goal Track

Recognize and communicate the competitive market facing Rhode Island and use to build cooperation.

Table 3-4						
Goal Track - Compete						
	Organizational Responsibility			Implementation Timeframe		
Objective 1 - Follow the Leaders to Build Competitive Response						
Tactic 1 - Review major competitive initiatives - both product and marketing related	P	S		X	X	X
Tactic 2 - Develop appropriate responses to keep RI competitive	P	S		X	X	X
Objective 2 - Build Mindset of Cooperate Internally/Compete Externally						
Tactic 1 - Use external competitive challenges to help build internal cooperation	P	S		X	X	X
P: Primary Role						
S: Secondary Role						

There are two key objectives in the compete track required to maximize long term competitive position.

Compete Objective 1 - Follow the Leaders to Build Competitive Response

Successful destination marketers are diligent in following and understanding their competition. Rhode Island Tourism must develop procedures and processes that keep RIEDC informed of program initiatives developed and implemented by competitor states within the region and elsewhere. RIEDC must use both scientific and “gorilla” research tactics to monitor competitive initiatives that target the state’s ideal customer profile, as well as its existing and repeat customers and respond accordingly. Understanding new product initiatives and marketing techniques that affect the state’s ability to compete should be reviewed periodically in a cooperative environment with the state’s regional DMO structure.

Compete Objective 2 - Cooperate Internally and Compete Externally

Armed with an understanding of the competition and its programmatic successes and failures, RIEDC must employ periodic competitive reviews with the seven tourism regions across the state. These data are an integral element in the annual market planning process and must be used to realize enhanced cooperation among all DMOs. Concentrated efforts to instill the understanding that industry success is dependent upon “internal” cooperation must be achieved before the state can achieve competitive advantage.