



OHIO'S WILDERNESS TOURISM STRATEGY

Ohio's Wilderness

This plan adopted a theme of “Ohio’s Wilderness”. As an organizational concept, it echoes the pitches made by many local organizations in promoting area tourism, effectively captures visitor interest in the region, while highlighting connections between the various types of local attractions. Outdoor recreation and the many parks, forests, lakes, and rivers that are the primary driver of visits are certainly represented by the ideal of wilderness. Native American and Settlement Era history are also tied to wilderness and exploration of the Northwest Territory. Many attractions also relate to the idea, whether sites like the Adena Mansion and Dogwood Pass, or agricultural tourism and destination downtowns featuring local arts and handcrafted food or other products. Even most of the small event venues prominently feature their farm or forest setting. Perhaps most importantly, visitors to Southern Ohio respond to the concepts of exploration, rusticity, crowd-free places, and unspoiled nature embedded in the concept of wilderness. As *Ohio’s wilderness*, it establishes a sense of ownership for the millions of residents in the metropolitan areas north and west of the twelve counties, who make up the bulk of the area’s visitors.



Acknowledgements

2022

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Part One: Tourism Strategy





INTRODUCTION

The Ohio's Wilderness Tourism Strategy was completed over a period of several months in 2021-2022. It covers twelve southern Ohio counties including Adams, Brown, Clermont, Fayette, Gallia, Highland, Jackson, Lawrence, Pike, Ross, Scioto, and Vinton. The plan was commissioned by the Ohio River Regional Development Council, funded by a grant through the Appalachian Regional Commission, and completed by Place Dynamics LLC.

Tourism to places such as southern Ohio boomed during the pandemic, as many indoor venues and others that could not implement social distancing closed, foreign travel was often impossible, flying was seen as potentially unsafe, and people had a great deal more time to spend on leisure activities. Outdoor locations remained accessible and nearby sites were easily reached by driving, leading both experienced outdoor enthusiasts and newcomers into the forests and onto the lakes and rivers near major markets around Cincinnati, Dayton, and Columbus. Businesses and attractions that could remain open benefitted from that new traffic. Moving forward, it will be important for the region to continue to build visitor volume, diversify and enhance the area's attractions, and translate tourist visits into new wealth, employment, and economic opportunity for the region's full-time residents.

This plan lays out a strategy with three equally-important elements. Firstly, it highlights attractions and activities with strong visitor interest, that can be further developed to increase visits to the region. It includes both general and specific recommendations for improvements to sites and infrastructure. Secondly, it suggests approaches to marketing, to promote the region instead of individual counties, and to adopt new techniques to reach specific audiences. There is a great deal of variation between the counties, in the resources available and techniques used for tourism promotion. Lastly, the plan suggests a framework for regional collaboration that is necessary to brand a distinctive region, create more compelling experiences, and leverage available funding for capital improvements and marketing.

The document is organized in two parts. The first offers an overview of the research and significant findings, before laying out a strategy to build a more vibrant tourism sector. The second delivers a more detailed summary of the research. As part of the project, extensive data has been provided electronically for 80 sites in the twelve counties.

Methodology

The tourism plan is based on a detailed analysis of the region's attractions and visitor market. Due to the ongoing pandemic, with several businesses or attractions closed, and minimal opportunities for face-to-face interaction, the analysis instead drew heavily on new forms of data, along with informal business, stakeholder, and visitor discussions. The process included several key elements.

- ▶ **Site visits.** The consultant team used four visits to the region to tour many of its attractions, including communities and shopping districts, outdoor recreation sites, Native American and historic sites, scenic byways, businesses, and attractions. Significant tourist sites in adjacent counties were also examined as they can contribute to visits in the study area counties. Visits were conducted in April, August, and October of 2021, and in March of 2022. During those visits the consultant team observed conditions and gathered insight through conversations with tourism officials, business and attraction employees or owners, and tourists at the various sites.
- ▶ **Marketing resources.** The consultant team gathered and examined printed, online, and onsite marketing materials for the region. This included marketing materials created by tourism promotion organizations in each county, along with state or regional offices, and private businesses. Online content included county tourism websites, social media, and private travel sites. The intent of this review was to identify which assets are being promoted, how they are promoted, and to compare against standard industry practices. Additionally, a scan of online reviews helped to assess how attractions and services are viewed by customers.



- ▶ **Mobile device tracking.** Approximately 100 sites were examined using mobile device tracking data. Because of limited cell coverage and/or low visitation, a valid data sample could be collected for 80 of these sites. Annual data was collected for 2018 through 2021. It is summarized in this report and the individual data files were provided electronically, for the use of tourism organizations and the sites for which data was collected. The data provide insight into overall visitation, patterns of visitation, and visitor origins.
- ▶ **Demographic and psychographic data.** Each of the 80 attractions has a trade area from which a majority (80 percent) of its visitors are drawn. These trade areas were used to pull demographic data from the Census Bureau’s American Community Survey. The trade areas were combined to understand the overall visitor market for the twelve-county region. Demographic and psychographic information for visitors drawn from areas outside of the twelve counties was obtained through ESRI Business Analyst. Psychographic profiles are groupings of visitors (market segments) based on demographic and lifestyle characteristics.
- ▶ **Presentations to regional tourism stakeholders.** Two presentations were made during the course of the project. The first of these shared research findings and the second presented a draft strategy. Input was solicited from attendees and others during the presentation and afterward, including through the use of a project website.

Attractions and Visitors – An Overview of the Opportunity

Nature and outdoor recreation are the main drivers of tourism to counties in the region. Visitors are drawn to national and state forests, state parks and natural areas, the Edge of Appalachia and Arc of Appalachia, the Ohio River and other rivers and lakes, and scenic byways. Many diverse activities are supported in these locations, including camping, hiking and backpacking, road or mountain biking, horseback riding, boating, canoeing, or floating, fishing and hunting, motorcycling, scenic driving, ATV riding, bird or wildlife watching, and more. Several of these sites are exceptional, and may be among the handful of Ohio sites where people can engage in some activities. Even at the best sites, selective enhancements may improve the visitor experience. Overall, the assets in the region need further development and need more effective promotion to reach their potential audience, but can be promoted as an “undiscovered” and “crowd-free” alternative to Hocking Hills.

A diverse set of attractions follow outdoor activities as a draw to the region. These include the fairgrounds in each county, museums and other arts and cultural venues, racing tracks, and unique venues such as Dogwood Pass, the Christmas Cave, or All Hallows Eve Terror Town. Several of these sites operate only seasonally, but have the potential to diversify and extend their season, or operate in more than one period during the year. County fairgrounds present one of the most immediate opportunities to capture more tourist visits. Relatively minor improvements can make their campgrounds an appealing stop for recreational vehicle or even tent campers, earning more overnight stays for their host communities. Fairground facilities can also be better marketed to host events throughout the year. Attraction operators can leverage affinity data obtained using mobile device tracking (businesses and sites frequented by visitors to the attraction, as well as the location visited immediately before and after their visit) to package and extend visits, or encourage return trips.

The broad category of Native American sites is seen as the third-most important of the area’s attractions. While it is dominated by a handful of sites associated with the Hopewell Culture National Historical Park, southern Ohio is thickly covered with Native American archaeological sites from the Hopewell Culture and later tribes that occupied the area. The significant Hopewell sites have been nominated as a UNESCO World Heritage Site. Even many of these, however, are under-developed in comparison to sites of similar importance, like Cahokia in Illinois, Etowah Mounds in Georgia, or Aztalan in Wisconsin, where reconstructions add interest and help to interpret the sites. With multiple important sites, there is an opportunity to link them with a driving route. The sites are also deserving of a museum befitting a UNESCO World Heritage Site, which may be in multiple sites instead of a single facility.

Southern Ohio is also home to several sites and events important to American history. Multiple locations are associated with settlement in the Northwest Territory, the Ohio River as a travel route in early settlement and commerce, iron mines and furnaces, historic communities, the Underground Railroad and African American history, the Civil War, and Ulysses S. Grant. Individually small, they can be combined to create a more significant draw, often as part of a larger destination activity. Many of the sites are located along, or in close proximity to the Ohio River Scenic Byway and can be woven into a more compelling touring experience on that route.

Large concentrations of unique shopping and dining can be an attraction themselves, while smaller districts or even individual shops and restaurants may contribute to a trip. Ohio's Wilderness supports only a few such concentrations, although the potential exists for others, especially along the Ohio River or in the area's more architecturally and historically-significant communities. The Amish and Mennonite communities in the region support several businesses of great interest to visitors. Similar or complimentary businesses can leverage existing customer traffic, especially on Sundays when many are closed.

Agricultural tourism is a growth opportunity across most of the twelve counties. The Amish and Mennonite shops already serve as an example of the appeal of locally-made products. Breweries, wineries, fruit and vegetable stands, Christmas tree farms, and farm-based seasonal activities like corn mazes or u-pick berry farms are other examples. Agricultural tourism crosses into other facets of economic development, promoting agricultural diversification, value-added agricultural processing, and even business district revitalization when related businesses locate in downtown districts.

The distinctive character of southern Ohio has led many property owners to establish small (and a few large) event venues. These may be converted barns or homes, or new structures designed to host weddings or family events. A few are pursuing a different market, whether hosting entertainment or pursuing small corporate meetings. The many events hosted in communities around the area add to these "places to gather and celebrate".

Visitor Infrastructure

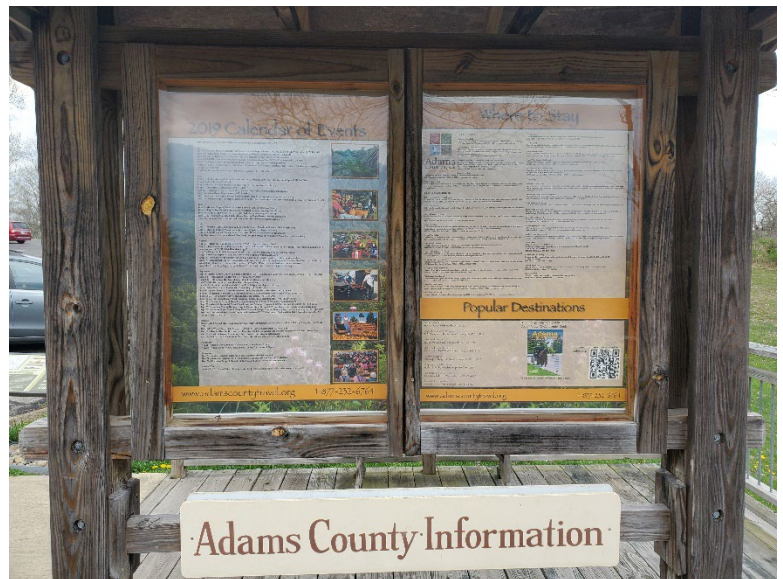
Any place has an infrastructure to support tourism, which includes its physical infrastructure, businesses offering goods and services needed during a visit, and onsite assets to support the visit, such as visitor information centers.

- ▶ **Transportation.** The region's transportation infrastructure is suitable for most purposes. One exception to this is the subset of visitors who pull a trailer or travel in a motorhome. They will find some of the narrower or possibly steeper lanes (such as the road to Picnic Point) difficult or impossible to travel. Warnings should be posted before the intersections to these roads, alerting drivers before making a turn, as there are no suitable places to turn around. Additionally, these visitors will frequently have difficulty finding a place to park at many of the attractions. Bicyclists are another group whose needs can be considered in future transportation improvements, both through additional bike path construction, and by providing bicycle lanes along desirable routes, such as along the Ohio River Scenic Byway.
- ▶ **Telecommunications.** Cellular coverage and internet access are concerns across the region. Tourists are very reliant on their mobile devices for navigation and to discover nearby destinations like attractions, hotels, or restaurants. Cellular coverage is often lacking in critical locations, such as at state parks and campgrounds. Compounding the issue, very few locations offer public wi-fi access. This is notable in many restaurants, coffee shops, and similar businesses that elsewhere routinely offer the service, and especially at private campgrounds where tourists will expect the service to be available.
- ▶ **Lodging.** Lodging alternatives found in the region include chain and independent hotels and motels, bed and breakfast or similar inns, short-term rentals, or public and private campgrounds. Hotels and motels are mostly congregated around the larger cities, and include a combination of older independent and chain hotels and motels, and newer chain hotels. Online reviews are generally average to better. Bed and breakfast inns, either in historic properties or new properties in the rural areas, are well reviewed. These are commonly the only lodging in smaller communities. Short-term rentals are found throughout the area, with many in the northeast, close to Hocking Hills State Park.

Campers have multiple options. The county fairgrounds have campgrounds that can be used by travelers. They often have the most sites, but limited services for recreational vehicles, and may not be suitable for tent campers. State park and forest, national forest, and other public campgrounds are also limited in the services they offer. Some are not adequately sized or developed for RV campers, and cellular service is not available at some campgrounds. Private transient campgrounds do not compare well to national standards, for the RV travelers that make up the bulk of the market. Issues of concern include the quality of individual camping sites, infrastructure (electric, water and sewer hookups), and amenities. Almost none of the private campgrounds offer effective wi-fi internet access. Most do not have a means to book stays online.

- ▶ **Dining.** The region offers a strong complement eating and drinking establishments with unique offerings including breweries or brewpubs and wineries, several bakeries and delis, and seasonal dairy bars. Larger communities may have chain fast food or even family dining restaurants, while traditional independent restaurants and other venues are located in nearly every community. Several eateries rise above the typical restaurant and can be featured as a popular “add-on” to a visit to Ohio’s Wilderness.
- ▶ **Shopping.** Amish and Mennonite furniture stores, bakeries and delis, and farm markets are popular components of a trip to the area. Antique stores, bakeries, and other specialty shops can also contribute to a visit, and have the potential to become a reason for a visit to communities that can support a larger concentration. The outlet malls in Fayette County also play a unique role in tourism. Aside from these business types, travelers often need access to shopping for groceries and other basic items, which can be found in many communities close to the primary visitor attractions.
- ▶ **Visitor information.** Access to on-site visitor information is uneven across the different counties, and many opportunities to promote tourism are missed. Several counties and even a few communities have visitor information centers or chambers of commerce where visitor information is available. These usually have limited hours or minimal displays highlighting only sites and businesses in the county or community. Only one was seen to have any material available after hours. The same can be said of state and federal park and forest sites, where it is often difficult to get any printed information about the park or forest, trail maps, campground information, etc.

There are numerous rest areas or other sites along major roadways that could be utilized to promote regional tourism through displays and literature distribution. Along these and other roads, wayfinding signage often does not exist or is too small and infrequent to effectively guide those unfamiliar with the area. Adams County has done an exceptional job of erecting displays at destinations throughout the county, but it is almost alone in doing so.



Tourism Organization and Marketing

Tourism development and promotion are occurring at a county, and sometimes local level, often without much coordination between neighboring or overlapping jurisdictions. There are some exceptions to that, such as where organizations along both sides of the Ohio River are partnering to promote their historical resources. This collaboration is essential to growing tourism in the region, as: 1) most attractions are not sufficient, alone, to attract the longer-duration visits that result in higher spending; 2) complementary attractions, or the businesses offering the goods and services visitors want, are often located in different communities or counties; 3) visitors do not think in terms of visiting a county, but rather a destination and the region; and 4) partnerships stretch limited resources to deliver more desirable experiences, and to increase the reach of marketing.

Different organizations are playing disconnected roles in regional tourism. Promotion is largely falling to tourism offices within county government, or funded through the county. Chambers of commerce are playing a secondary marketing role at a more local level. Infrastructure and public tourism asset development falls to a combination of local, county, state, and federal government agencies. In most cases, tourism has not received a great deal of consideration in how it relates to planning, transportation projects, or even some recreational sites. Aside from Adams County, it does not appear that there have been any efforts to work with state and federal property managers to place visitor information at campgrounds,

trailheads, park offices, highway rest areas, or other locations where its availability could prompt new visits, or additional stops at nearby businesses and attractions.

Most tourism promotion organizations still rely heavily on printed marketing pieces, headlined by a magazine-style publication, with other specialized pieces. Printed materials are important for distribution through visitor centers such as those maintained by the state, and they will also have some value in areas with poor coverage – provided they get into the hands of visitors. This may not be the case, as they were mostly not seen in the lobbies of hotels and other businesses frequented by tourists, or at most attractions. Again, some counties were more effective at distribution. The content of these magazines is typical of similar publications, and useful, but may leave visitors searching for more detail. Additionally, because they seldom extend beyond the borders of the county, they omit sites and information that might help visitors extend their stay or plan a return trip to visit nearby attractions.

Online content includes websites maintained by tourism organizations, local government, and other public organizations such as Downtown Chillicothe or Main Street Portsmouth. Most of these organizations also maintain social media sites, with varying degrees of updating and followers. Less attention is being paid to private sites that accept user-submitted information, and can be a very effective means of promoting sites, communities, and regions. These include general and widely-used review sites like Google Maps, Bing Maps, and Yelp, and trip planning sites like Expedia or Trip Advisor. Activity-specific mobile applications (with accompanying websites) are becoming the most important means of targeting specific audiences. Some applications, like Roadtrippers and Only in Your State, provide information about general attractions for auto touring and trips. Others target an activity like mountain biking (Fat Tire), hiking (AllTrails or The Hiking Project), RVing and camping (RV Parky or Campendium), antiquing (GPS Antique Atlas), and more. Content for Ohio's Wilderness is generally lacking for these apps.



Only in Your State, provide information about general attractions for auto touring and trips. Others target an activity like mountain biking (Fat Tire), hiking (AllTrails or The Hiking Project), RVing and camping (RV Parky or Campendium), antiquing (GPS Antique Atlas), and more. Content for Ohio's Wilderness is generally lacking for these apps.

Private businesses are not being effectively marketed for tourism. As examples, event venues are not listed on the many websites compiling information for weddings or other events, and farm markets and other agricultural businesses are not listed in the handful of statewide directories. Few businesses have created an effective online presence through websites and social media, or are conducting any social media advertising. Similarly, few have claimed and developed their site on Google Maps and Bing Maps, or other platforms such as Yelp

and AllMenus. Online searches have become the first choice for most visitors to discover the businesses that might interest them or serve their needs for lodging, shopping, and dining. There is an expectation that the business will be listed and have current and complete information online. Furthermore, many online users will want to have the ability to place orders, make purchases, or make reservations online.

The area's tourism organizations work with a variety of partners to generate travel and help steer it to local businesses. Key promoters include the Ohio Department of Tourism and Governor's Office of Appalachia, and Ohio's Appalachian Country. Stronger partnerships are needed with state departments such as transportation and natural resources, and with federal agencies such as the Forest Service and Corps of Engineers, all of which administer sites visited by tourists. Partnerships will help to identify ways in which sites might be enhanced to create a better experience, and to explore marketing and other measures to help guide visitors to nearby communities and businesses. These latter efforts need to occur at a county and site level. Some counties have also reached across the Ohio river to explore partnership opportunities with counties and cities in Kentucky and West Virginia. Lastly, economic development agencies in the region can be enlisted to support initiatives related to business district vitality and tourism business development.

The Changing Tourism Industry

The tourism industry is in turmoil, with winners and losers in a dramatically unstable environment. Destinations and businesses looked forward to a promising year in 2020, only to have the pandemic strike, discouraging travel and shutting many businesses that could not implement safety measures. It was a year, though, when those people who did travel stayed closer to home, and favored outdoor locations such as those that make up the core of visitor destinations in Ohio's Wilderness. The following year saw a reinforcement of these patterns, with more businesses able to open at least partially.

As concerns about the Coronavirus receded and Americans looked to travel in summer of 2022, inflation and rising gas prices have put a damper on some plans. A May 2022 poll conducted by the Washington Post found that 72 percent of households would probably vacation over the summer, with 77 percent planning to travel by car. Gas prices were the top concern, with 61 percent rating them a significant factor. Lodging came in second as a major factor for 54 percent. In the past, similar conditions have led to fewer trips and shorter distances, which can work to the advantage of the twelve counties, which are all within a short drive of major metropolitan areas. Given the recent nature of the price spikes, there is too little data to draw any conclusions just yet.

Tourism is also being impacted by a shortage of labor. Businesses or attractions that are unable to fill positions may be forced to offer less programming, reduce hours, eliminate services (such as many fast food establishments that are only taking drive-up orders), and make other cuts that can result in lower sales volumes, and potentially leave visitors unsatisfied with their experience.

[Tourism's Economic Impact](#)

A 2018 report, *The Economic Impact of Tourism in the Appalachian Region of Ohio*, estimated the economic contributions of tourism across most of the counties in Ohio's Wilderness. Fayette County was not included in the study.

TOURISM'S ECONOMIC IMPACT

COUNTY	SALES	JOBS	WAGES	TAXES
Adams	\$42,100,000	640	\$14,700,000	\$5,100,000
Brown	\$64,400,000	935	\$18,300,000	\$8,500,000
Clermont	\$602,100,000	6,016	\$142,300,000	\$75,500,000
Gallia	\$69,300,000	890	\$20,200,000	\$8,600,000
Highland	\$49,300,000	1,036	\$14,100,000	\$5,900,000
Jackson	\$54,800,000	1,107	\$16,700,000	\$6,700,000
Lawrence	\$50,400,000	1,005	\$22,800,000	\$6,800,000
Pike	\$28,800,000	581	\$9,500,000	\$3,500,000
Ross	\$167,900,000	2,527	\$53,800,000	\$21,700,000
Scioto	\$193,900,000	2,084	\$45,300,000	\$23,300,000
Vinton	\$27,100,000	229	\$3,700,000	\$2,900,000

Retail trade and eating and drinking establishments are the largest beneficiaries of tourism spending, both in direct sales and overall. These are also the sectors generating the most employment.

[The Post-Pandemic Traveler](#)

Several organizations are using online and other data to attempt to define the travel segments emerging from the pandemic. Pinterest has one of the more useful ones, using an analysis of its posts to define eight segments, which it can also use to target advertising buys using tailored content to resonate with each group. Many of the eight groups align with the resources and experiences that can be offered in the region.

1. Rural tourist. These visitors are hitting “roads less traveled” to seek out small towns with charm. They will find interest in places like downtown Chillicothe and the Boneyfiddle District.
2. Memory makers. Made up of couples and families, they want to make memories that will last a lifetime. This can include intergenerational groups, perhaps renting an AirBnB or cabins at a state park.
3. Outdoor junkies. This group is motivated to find new destinations for varied outdoor experiences. They are the ones to lure “beyond Hocking Hills”.
4. Culture chasers. Culture (art, music, etc.), cultures (such as the Plain Communities), history, and similar experiences drive visits from this group.
5. Digital nomads. A growing segment of the market is comprised of people who combine work and travel, necessitating connectivity at all times.
6. Bucket listers. These are big dreamers, even if on a smaller scale. Instead of climbing Mount Everest, their goal may be to hike the Buckeye trail or visit each of the state parks.
7. Foodie traveler. For these travelers, food is central to the experience of a place. That can include locally-grown and crafted products from farmstands to breweries, unique venues, and local flavors.
8. Weekend travelers. These are short trips to “get away”, often from the city, and include scenic drives to nearby destinations.

TOURISM STRATEGY

The Ohio's Wilderness Tourism Strategy has three elements addressing destination development, marketing, and organizing as a region. Each of these is equally important to establishing a more attractive and successful tourism region.

Destination Development

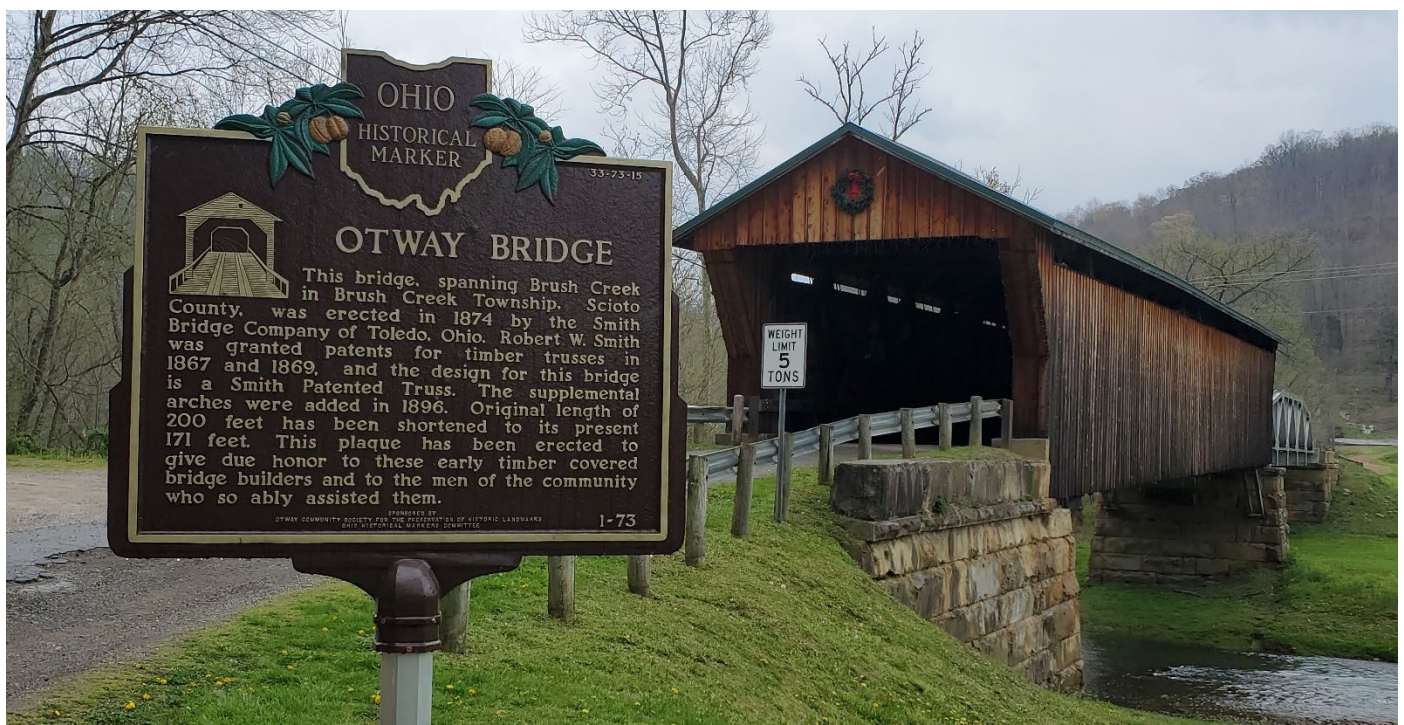
The recommendations in this section address needs to improve physical tourism assets in the region, whether destinations and attractions, or the infrastructure supporting a visit. These recommendations are mostly broad in nature, rather than focusing in on any single attraction. Individual actions supporting these recommendations may be carried out at the local, county, or regional level. Local tourism officials will often need to play a role in communicating development needs to owners and managers of attractions in their jurisdictions.

Initiative 1: Visitor Services and Sense of Place

This initiative is directed at ensuring visitors have a complete and enjoyable experience. Services they need (like lodging, dining, and shopping) and places where they can get visitor information exceed their expectations. Their travels leave them with a distinct sense of Ohio's Wilderness as a unique place with plenty of "Instagram moments" worth capturing and sharing. Tourism is a vital source of income to many of the region's small businesses. Business development helps the region capture visitor spending, creating jobs and generating wealth within its communities.

The degree to which visitor needs are being met varies across the region. Most of the desired shopping and services are found in larger communities. Some attractions, like event venues, may struggle with issues like a lack of nearby lodging that can make it difficult to book destination events. Elsewhere, the quality of available services may not meet the expectations of visitors. Hours of operation can also be an issue for independent businesses.

The recommendations in this initiative also seek to sustain and enhance the unique character of Ohio's Wilderness, creating a "sense of place" that people associate with the region. This physical landscape is an element of branding, as recognizable as the skyline of a city. This is sometimes referred to as a "vernacular landscape". The components of that landscape are the classic pieces of Americana found in each county, like their covered bridges, Mail Pouch barns, dairy bars, downtown



streetscapes, rural landscapes, and scenic vistas. Part of this initiative is focused on preserving and leveraging these contributing assets to build a unique identity for the region.

1. Explore the opportunities for new hotels, resorts, and similar lodging.

Large parts of the region are not served by nearby hotels. Other areas may be able to support additional rooms as tourism grows. This could include the potential for property types not already in the immediate area, such as a mid-tier hotel where there is only an economy hotel. Tourism officials can be proactive in monitoring the market and conducting the research to support new lodging development. Specific actions include:

- ▶ **Monitor the market.** Smith Travel Research (STR), now a part of Costar, provides monthly and annual trend data for the hotel industry. AirDNA provides similar information for the short-term rental market. Data in the reports include property and room inventory, occupancy, revenue, and revenue per available room. This can be reported for the twelve counties in aggregate, and smaller subregions. Tourism officials should encourage hotels in their counties to participate in data reporting, as well as using the data to improve management and pricing.

A single subscription to these data services, at a regional level, will provide access to the information at a local level while reducing the cost duplication that would result from each county ordering the data separately. Ohio Valley Regional Development Commission can fill this role.

- ▶ **Investigate the potential for new lodging in promising areas.** Local markets may present an opportunity for new lodging development. It is not uncommon for local governments to initiate the development process by conducting feasibility studies to assess the market opportunity. Ohio Valley Regional Development Commission can be a conduit to help local officials secure grant funding to share the cost of these services.
- ▶ **Support new boutique/unique lodging opportunities.** Areas that do not have a market large enough to support a traditional hotel may support other properties, ranging from short term rentals to unique offerings like historic inns, bed and breakfast establishments, cabins, treehouses, glamping, yurts, etc.

2. Encourage public and private campground operators to invest in the upgrades desired by visitors.

Area campgrounds lack a level of development and amenities sought by users, particularly among the growing number of RV travelers. User expectations do vary by type or ownership, with lower levels of development accepted at national forest sites, and the highest levels of amenities anticipated at private campgrounds catering to recreational vehicle owners. Issues often encountered by camping travelers, and recommendations include:

- ▶ **Enhance campgrounds at county fairgrounds.** County fairground campgrounds are the most promising sites for development that will increase overnight stays in the region. Located in cities, they have access to infrastructure that may not be available in rural locations, and there appears to have been increased utilization during the pandemic. These are basic facilities offering a pad and an electrical hookup. Some portion of the campground can be improved to appeal to transient travelers. Improvements can include landscaping, picnic tables, water hookups, and wi-fi internet access. A dump station should be provided. Sewer hookups at campsites can be considered but are not necessary. Some campgrounds require upgraded restroom and shower facilities with keycode access. Travelers with large vehicles, towing, or only staying one



night will be attracted to pull-through sites. There must be a means to book sites online and to accommodate after-hours registration.

- ▶ **Improve state park and forest campgrounds.** Visitors at forest and lower-volume state park campgrounds often comment about the small size and uneven surface of camping pads. Many may have been designed and constructed at a time before recreational vehicle travel became common, and are too short for some larger trailers or motor homes, which also require a level surface. These thoughts can be considered by the State and Forest Service in planning for capital improvements, and local tourism officials can play an important role in identifying campgrounds where such improvements will have the greatest impact.
- ▶ **Encourage improvements to private campgrounds.** Private campgrounds are serving three types of camper: 1) through-travelers who spend a night or two visiting a nearby attraction or driving across the area; 2) camping resort travelers who are seeking a campground with extensive amenities including recreational assets; 3) seasonal campers who are looking for a permanent or semi-permanent site to park a trailer, but require few amenities. A majority of the persons using private campgrounds will be traveling in a motor home or pulling a trailer, with a small percentage of tent campers or persons wanting a camping cabin.

Most private campgrounds in the region offer few amenities. Almost none of them offer reliable wi-fi, which has become essential to a great number of travelers. Guests are commenting about uneven sites, the lack of basic site amenities like picnic tables, fire rings, and landscaping, and the condition of restroom and shower facilities. Most campgrounds do not have recreational amenities which would be especially important to family travelers. Guests at several campgrounds comment about the appearance of older trailers that appear to be permanent. As with many public sites, there is often no means to book a site online. Most have neglected to build an online presence and are minimally marketed.

Local tourism officials can educate campground operators on the market potential and expectations of campground guests, and provide technical assistance to help them make physical and management improvements to their businesses.

3. Provide training and technical assistance to improve the marketing of tourist-serving businesses.

Businesses across the twelve counties tend to be poorly marketed in general, and particularly in ways that would reach the tourist market. Visitor searches for lodging, restaurants, shops, and other services are conducted online through map-based search engines, the most important of which are Google Maps and Bing Maps. Other searches may bring up sites like TripAdvisor, Yelp, or AllMenus. Many of these businesses have not claimed their sites and added information to help attract customers, or to respond to reviews. Additionally, there are opportunities for cross-promotion, where data provided as part of this analysis shows customer affinity between attractions and specific businesses.



Training and technical assistance programs can be created at a regional level, drawing on organizations such as the Small Business Administration and Service Corps of Retired Executives to offer one-on-one assistance, classroom or webinar training, and printed or recorded resources. These program should be promoted by local tourism officials, who can identify the businesses in need of assistance.

4. Assist in tourism business development.

The volume of visitors at some attractions suggests the potential for multiple types of businesses serving the visitor market. These could include attractions like resort campgrounds, marinas, adventure courses, and seasonal venues (corn mazes, haunted

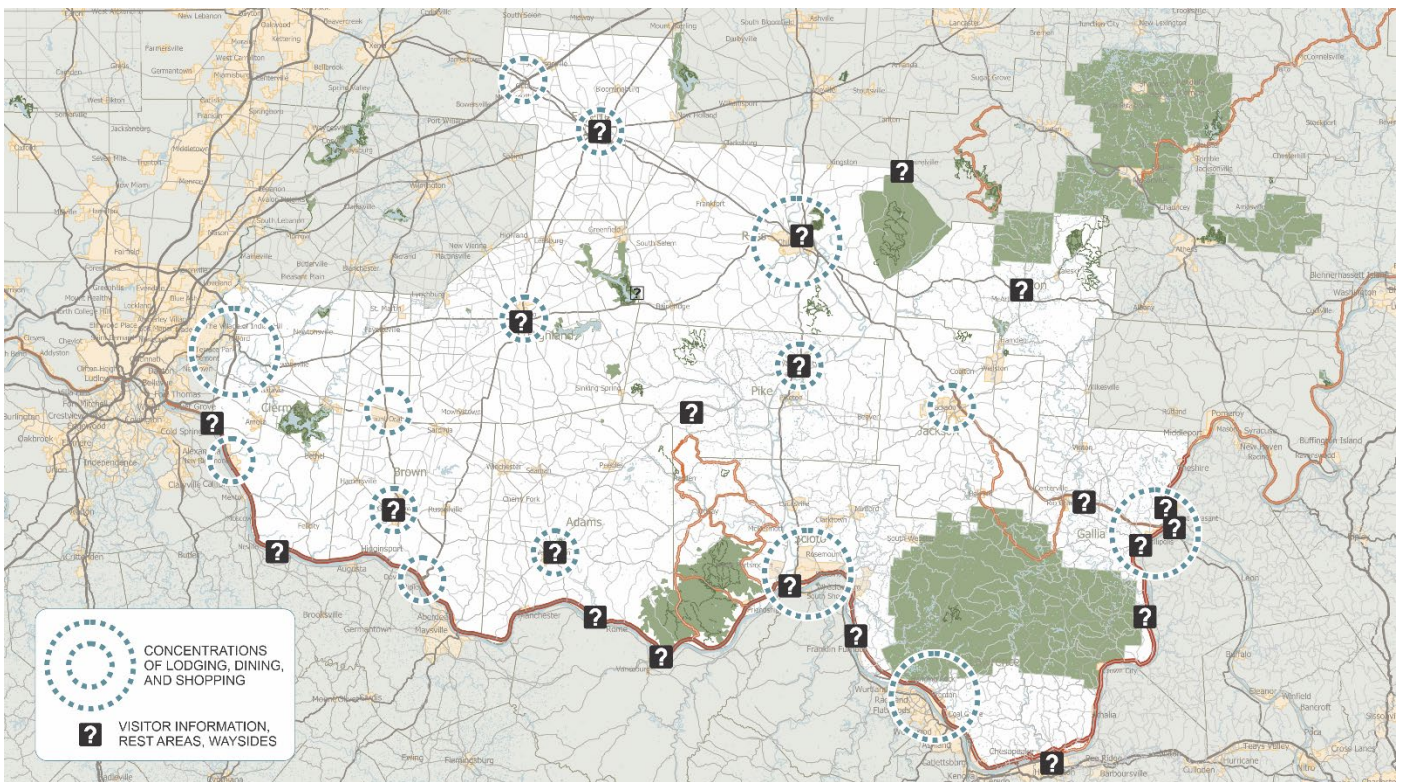
houses, etc.) along with shops, restaurants, and different kinds of lodging establishments. Many of these businesses thrive when there is a significant concentration that causes them to be a draw, such as is the case where several Amish or Mennonite businesses, or antique shops, or art galleries are in close proximity. Building these concentrations can be a collaborative effort of tourism and economic development professionals, particularly where their presence can help to be a catalyst for downtown revitalization. Tourism organizations can provide market intelligence and marketing assistance, while economic development partners are better able to provide small business development services and access to funding. Tourism officials need to be proactive in convincing economic developers to prioritize these businesses and form effective partnerships.

5. Build out and improve on-site visitor information resources (visitor centers, rest areas, pull-offs, kiosks, etc.)

Most counties and some communities have a visitor information center, usually in county buildings or at a chamber of commerce. There are several rest stops along major highways, as well as a few pull-offs or scenic overlooks, and parks adjacent to highways. Any of these may be opportunities to distribute printed visitor guides or to present information about attractions in the area. Many of these sites are considerably under-utilized, and what information is available is often limited to what is located in the county in which the site is located. Several steps can be taken to improve the dissemination of information on-site.

6. Approach visitor information as a region. While local attractions and businesses can be emphasized at each visitor center, information about other places should be available. Visitors may extend stays or plan a return trip if they are aware of nearby attractions.

- ▶ **Provide information after-hours.** Many visitor centers, including those for the Forest Service or state parks, are staffed for limited hours. Information should be posted outside of the office, and critical information like maps and brochures should be stocked in weatherproof containers for visitors to pick up if the center is not open.
- ▶ **Create a regional plan and a consistent brand for unstaffed locations.** Rest areas, pull-offs, and highway-adjacent sites are locations where kiosks can be installed to inform visitors of attractions in the area, especially along their travel route. The content of these kiosks (maps, attraction information, etc.) should be planned at a regional level. The design should incorporate the regional tourism brand.



- ▶ **Install kiosks at key sites.** Similar to what has been done in Adams County, local tourism offices should partner with attractions to install kiosks with regional travel information highlighting other destinations in the area, and not only those in the same county. State park and forest campgrounds should especially be targeted, and provide information on critical services like grocery and gas shopping, medical and veterinary services, repair services, and other information that might be useful to campers.

7. Install branded wayfinding signage across the region, guiding visitors to attractions and businesses.

Wayfinding signage has two purposes. It makes travelers aware of nearby attractions, and it helps to route them from primary highways to sites on secondary roads. It helps to capture unplanned stops by through-travelers, and plays a critical role in places without reliable cellular coverage.

- ▶ **Use route data to create a regional wayfinding plan.** The mobile device tracking data used to examine regional attractions mapped the routes used to reach many of the area attractions. This data should be considered in preparing a strategic, regional plan for wayfinding.
- ▶ **Create branded signage.** The signage used for wayfinding should be distinctive and incorporate elements from a regional brand, so that it is consistent across all twelve counties.
- ▶ **Incorporate a variety of formats.** While wayfinding is commonly thought of as road signage, a robust wayfinding plan will incorporate other elements such as billboards, markers, color schemes, and other visual elements in the landscape, to provide subtle cues and draw attention to features.



8. Improve cell phone and wi-fi coverage.

Hilly terrain presents challenges for cell phone coverage, and it may be difficult to work with private providers to expand services. At a more localized level, it may be more feasible to work with providers to ensure better coverage in some places with high visitor traffic, such as state parks or forest campgrounds and recreation sites. These are also locations in which it may be possible to provide free wi-fi access points, such as parks and rest areas.

9. Document, preserve, enhance, and promote elements of the landscape that establish a unique regional identity.

Ohio’s Wilderness has a distinctive character that is a combination of natural beauty and American heartland. The goal is to create a strong, favorable regional identity, so that “Ohio’s Wilderness” immediately conjures a distinctive vision similar to what someone may think if they were to imagine Kentucky Horse Country or Coastal New England. The elements of that identity are the area’s rural landscapes, scenic views, Mail Pouch barns and other signage from the past, covered bridges, historic downtowns, and similar pieces of quintessential Americana.

Several elements of that landscape are threatened. Many of the Mail Pouch barns are falling into decay and will soon be lost. The same is true of historic buildings in some downtowns, which may be vacant and decaying, or subjected to alterations that remove their character. It is important to save them, but also leverage them to increase recognition and visits to the region.

- ▶ **Create a mechanism to preserve and restore distinctive pieces of Roadside America.** Local governments and historical societies, where they exist, often lack the resources to invest in preservation. There is an opportunity to create a regional nonprofit organization dedicated to preserving features like the Main Pouch barns that are



threatened. This would have interest statewide and beyond, with the potential to pursue grants and other fundraising that would allow it to acquire historic preservation easements and stabilize or restore threatened features.

- ▶ **Explore alternative approaches to stabilizing and reusing historic buildings.** Historic buildings are decaying in communities where there is no longer a market for them, and in rural parts of the region. They may have low cost for acquisition, but substantial costs for restoration and reuse as originally designed. Elsewhere, communities have embraced alternative such as stabilizing, rather than restoring structures, and using them for open-air museums, or preserving the building shell and retrofitting new space within the footprint. That space may be made available for uses like artists' studios or visitor-oriented shops, food trucks or stands, garden centers, farmers markets or craft markets, and similar uses that can be in the open, or occupy a small space.
- ▶ **Leverage these assets to create “Instagram moments”.** It is important to create the opportunity for people to stop and enjoy the sight they want to see. Providing the means to do this will lead to social media posts that build recognition of the area. This is accomplished by simple means such as providing a roadside pull-off at a scenic viewpoint or where a traveler can snap a shot of a barn or the world’s largest crab. Some of these sites may also present an opportunity for tourist-related business development, such as where a business can be developed at a site with a photo opportunity.



Initiative 2: Natural Areas and Outdoor Recreation

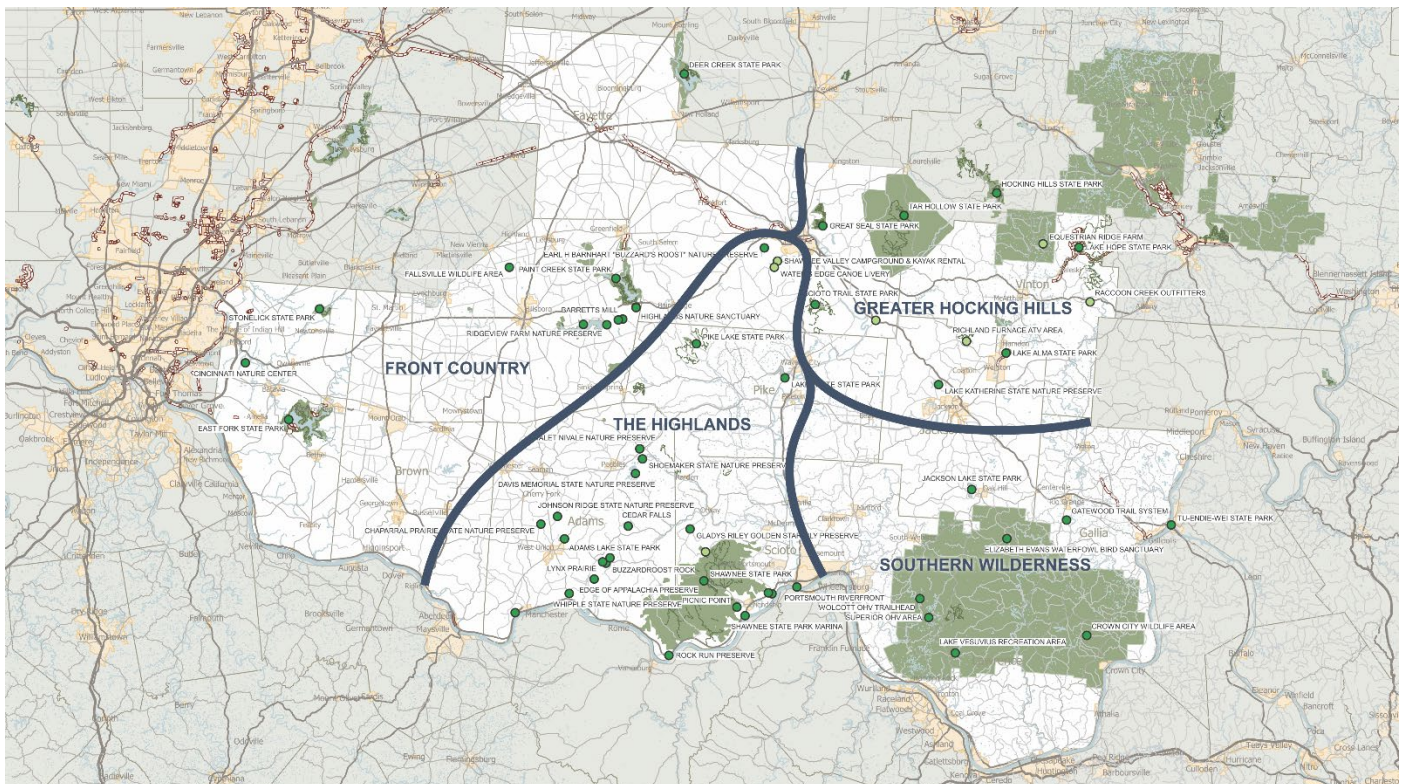
Tourists to the region's natural areas are drawn mostly from nearby metropolitan areas in Ohio. The draw of individual attractions varies considerably, with some able to pull visitors from the northern part of the state, and parts of Pennsylvania, Michigan, or Indiana. Others do not draw much beyond the local area. Both the level of development and a lack of awareness contribute to low visitor numbers. Outdoor recreation and the region's natural areas are still the largest draw for tourists, but are less well known than Hocking Hills or other destinations in neighboring Kentucky.

Strategic investment is needed to enhance the area's natural areas and recreation facilities. The region's top draw, natural areas and recreation sites offer different experiences in subregions of Ohio's Wilderness. Each area has unique assets to explore. Smaller assets often need improved visitor infrastructure, such as parking areas at trailheads, restrooms, and signage.

Ohio's Wilderness supports many recreation activities that are less available elsewhere in the state. These draws can be amplified through new investment in bicycle paths, canoe/kayak/raft waterways, horseback trails, OHV areas, and backpack trails, among other activities. For marketing purposes, it may be helpful to think of subregions based on the similarity of the landscape and attractions.

10. Invest in trail development.

The area's forests are known as a backpacking destination, as well as for hiking trails, such as those in the Wayne National Forest or Zaleski State Forest, or the Buckeye Trail. These areas also have equestrian trails, mountain biking trails, and OHV areas. There has been recent investment in off-road bicycle paths, with the longest extending from Chillicothe to Washington Courthouse. Shorter trails are found in Vinton and Gallia Counties, with plans for extensions. Water trails are also getting attention, with recent or planned improvements along the Ohio River and smaller rivers including Ohio Brush Creek, Paint Creek, Raccoon Creek, and the Scioto River. Canoe, Kayak, and tube livery businesses are located on several of these waterways.



Of the various types of trails, the greatest returns can be expected on extending existing off-road bicycle paths and water trails. Other trail types are extensively developed, and while thought should be given to enhancements like improved trailheads, their use will increase with better promotion.

- ▶ **Develop new bicycle path segments.** Most people who will travel to ride a bicycle trail are looking for paths with sufficient length for a full day, or longer ride. These would ideally include looped routes to avoid having to double back. The Ohio Valley Regional Development Commission can take a lead in coordinating a regional off-road bicycle path plan that includes existing routes, and recommending new routes and connections to cross the region. In a regional approach, planning should address the need to access campsites and lodging for multi-day rides. Consideration should be given to the idea of constructing a bicycle path along the Ohio River, in concert with the Ohio River Scenic Byway.
- ▶ **Improve the infrastructure for water trails.** Canoeing, kayaking, and floating, along with boating on the Ohio River, are activities with increasing rates of participation. The proximity of large metropolitan areas makes the rivers of Ohio's Wilderness accessible to a large population. Needs for this activity include additional and improved launch sites and amenities along the river like picnic areas, restrooms, and campsites. Waterways need to be promoted in regional tourism marketing and maps and guides need to be made available. There is an opportunity to create a mobile application for this activity.

11. Promote scenic drives and motorcycle touring.

The Ohio River Scenic Byway is an under-developed asset, not only in Ohio, but along its entire length. Ohio's Wilderness has an opportunity to capture the top ranking as a segment of the route, through many mostly small investments in features that package an experience for motorists. Examples include pull-outs and overlooks, interpretive signage, and highlighting the many side trips and destinations possible along the route.

Other route have been designated at a local or state level, including Scioto Heritage Trail and Welsh Scenic Byways and the Serpent's Bones motorcycle route. This plan recommends establishing a route spanning several counties to link significant Native American sites.

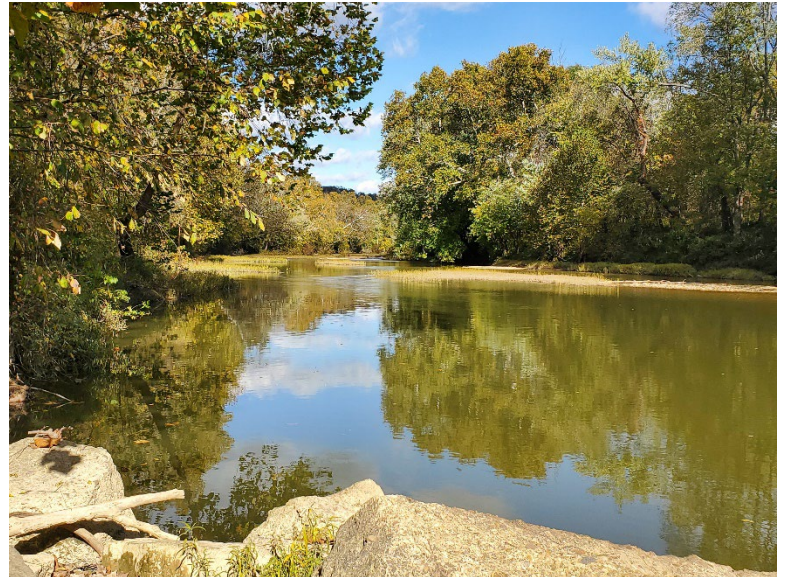


12. Support outdoor recreation business opportunities.

There are opportunities to start or grow businesses serving the outdoor tourist market, which will differ across the region based on existing visitor traffic and parks, forests, rivers, lakes, and other features in the vicinity. Examples of outdoor recreation businesses include adventure parks or skills courses, outfitters and guides, businesses selling products and services related to outdoor activities, and private recreation sites. This can be accomplished in collaboration with economic development agencies at the local to regional level.

13. Create four-season recreational opportunities.

Special events and activities can be promoted to extend travel beyond the usual season(s). Most of the region is still within a day trip distance of the big cities in central and southern Ohio. Discounted packages, events, and challenges are among the techniques used to lure visitors in slow seasons. Attractions can be encouraged to extend their season or open at other times to host seasonally-themed activities.



14. Capitalize on activity-based platforms to promote the area.

Marketing should reach out directly to enthusiasts in the activities which are popular in Ohio's Wilderness, like hiking and backpacking, camping, hunting and fishing, bird watching, boating, road and mountain biking, ATV riding, horseback riding, and scenic driving. Each of these has its own contingent of organizations, print media, blogs and other digital media, social media, and mobile applications. In some cases (like social media and bloggers) it will be possible to engage directly with activity participants and influencers. Content can be submitted or pitched to other forms of media. Mobile (and web-based) applications tend to accept user-submitted content along with reviews that can help to influence travel decisions.

Initiative 3: Diverse Visitor Attractions

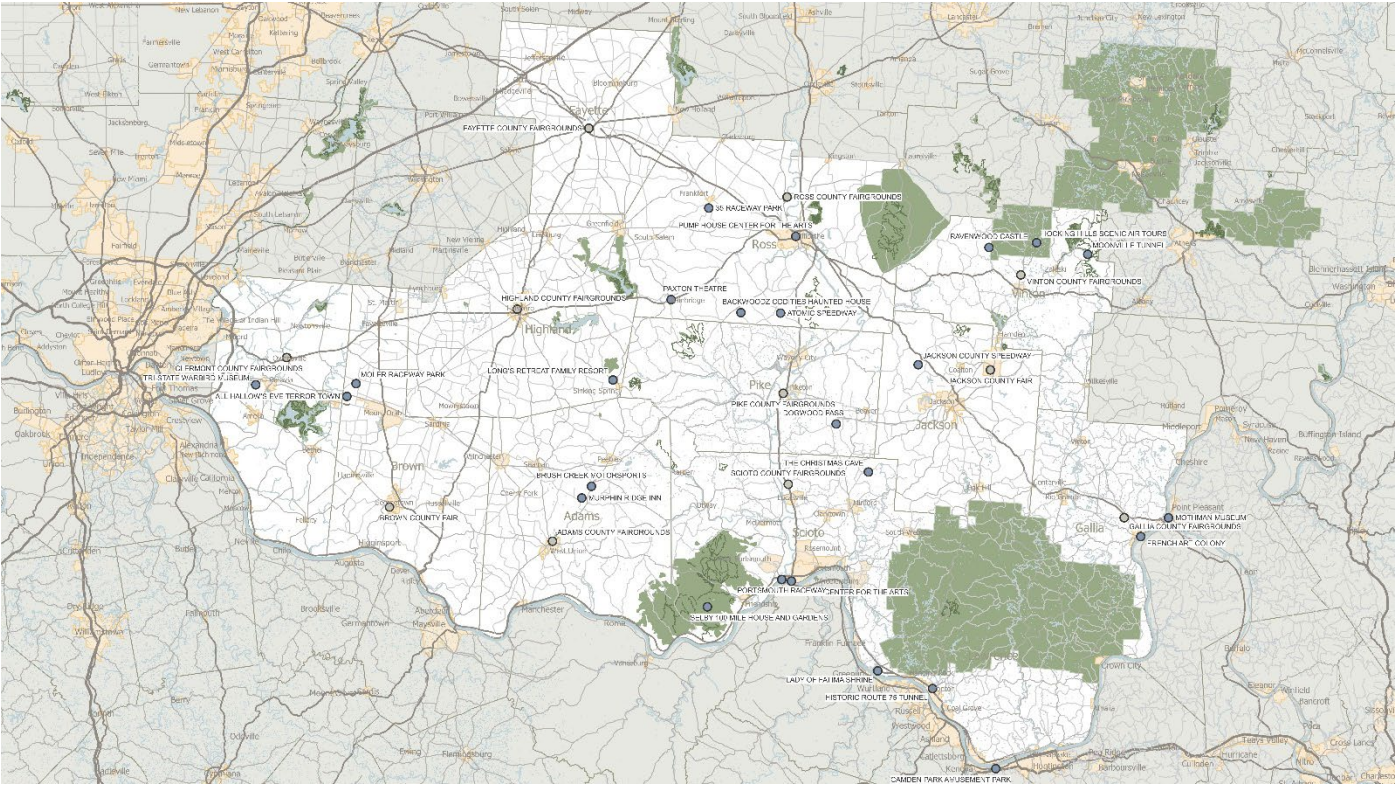
Racetracks, fairgrounds, arts venues, and seasonal attractions are just some of the sites bringing tourists into the region, and having the potential for growth. Many area attractions are underutilized or operate for a short season. Initiatives in this area focus on extending the season, better utilizing resources, and marketing to create broader awareness, with the goal of increasing tourist traffic to the area's unique attractions. Though there is no single, unifying thread, the region's attractions bring in a large number of visitors and can help to extend trips made for other primary purposes.

15. Capitalize on investments in fairgrounds by expanding facilities and attracting new events.

While fairgrounds represent a large investment, most see little use beyond the annual fair. They have, or could have the facilities to attract other events throughout the year. These can be privately-organized events, like fairs, performances, or seasonal events, rather than public or volunteer-driven events. Prospecting for new events is an activity that can occur on a regional level as a cost-saving measure, contracting with a private party to: 1) inventory existing facilities at all twelve fairgrounds and determine their abilities, or limitations with respect to hosting other events; 2) develop informational pieces about the available facilities and ensure there are listed, with complete detail, on event facility search engines; and 3) promote venues to event coordinators.

16. Implement new marketing approaches.

Many of the area's attractions are not well marketed. Even more rely on traditional approaches and have not adapted to new technology. Many of the shortcomings relate to the use of digital marketing techniques. Social media is an important medium that is often overlooked. Even when a site may have Facebook, Instagram, and Twitter pages, they are often not updated as frequently as they should be. Few sites are using social media advertising in conjunction with their page. These ads could target potential visitors based on demography, posting history, and geography.



Aside from social media, many sites need to enhance their web presence through map-based search engines (Google and Bing), the capabilities of their own websites such as fully-informative content and online reservations, and web optimization.

The role of tourism officials can be to help their important attractions identify marketing shortcomings, provide general training sessions, and connect attraction operators with one-on-one technical assistance.

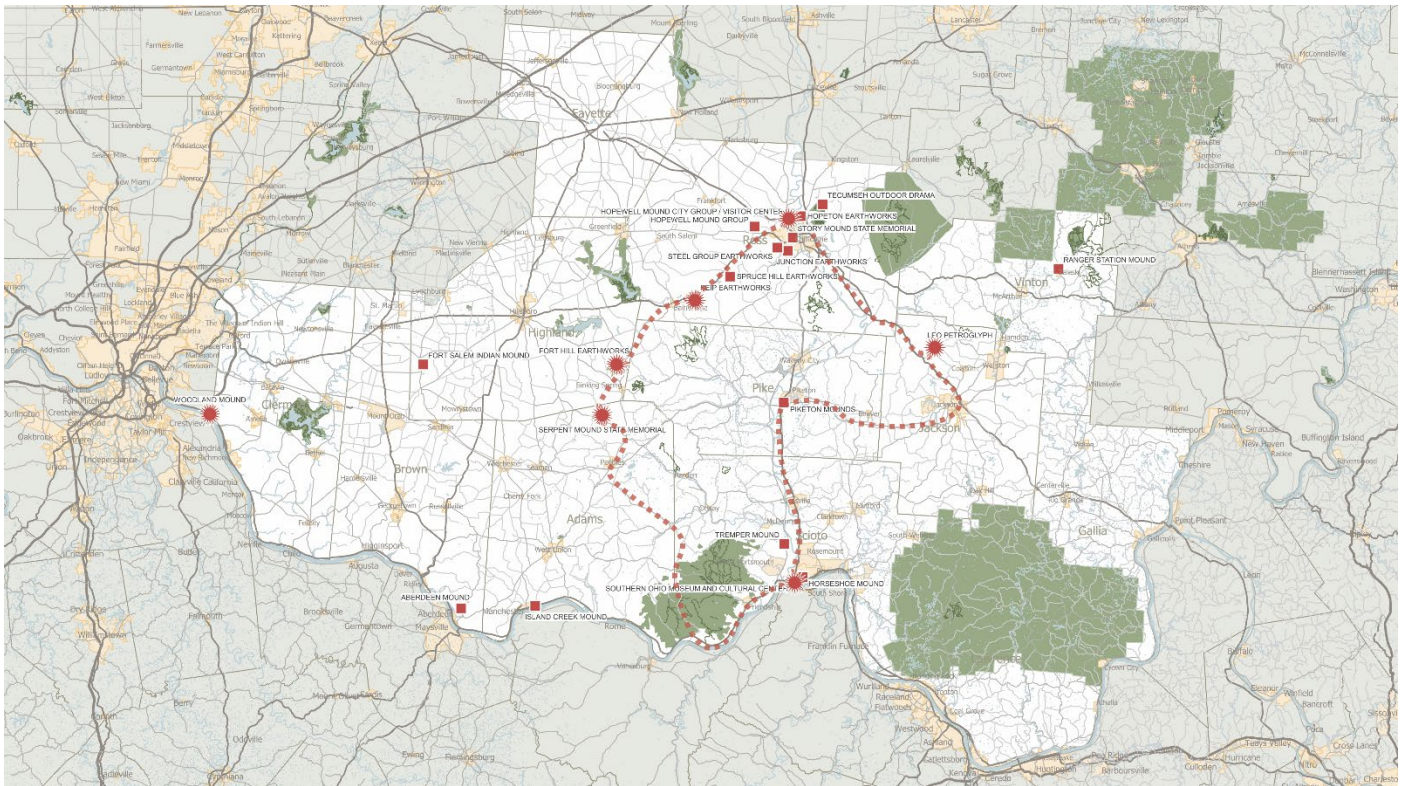
17. Implement affinity marketing programs.

Mobile device tracking makes it possible to identify the locations the people at a site visited immediately before and after their visit, and the businesses or sites they have in common with other people visiting the site. For example, about 18.0 percent of the people visiting the Mennonite business cluster on Highway 41, south of Bainbridge, have also recently visited Paint Creek State Park. The state park was the origin of 3.4 percent of trips to the Mennonite business area, and the destination for 7.5 percent of the people leaving it. By accessing and mining this data, a great deal of information can be found to help plan sample itineraries, determine where to market, and explore joint promotional opportunities between businesses or attractions. The information can also help to support fundraising by demonstrating visitor affinity to specific businesses in the area.

Initiative 4: Native American History

Hopewell and other Native American sites are not attracting a large volume of visitors, but several have a higher share of tourists compared to other attractions. With hoped-for designation as a UNESCO World Heritage site, these sites will take





on a higher profile and attract more visitors. Recommendations prioritize initiatives to further develop critical sites and adopt new marketing approaches.

Tourism to Native American sites is an aspirational target, as there is currently a light volume of visitors and many sites are not well developed, and some are even inaccessible. Visitation is low but the potential is high. People will travel far to see the sites, if they are developed and creatively packaged. To capture the potential, the sites need to be presented as a collection, highlighting the most memorable of the area’s assets. The experience of these sites needs to be enhanced through selective development projects.

18. Evaluate the opportunity for restoration projects to create a more tactile experience

The Mound City Group, Siep Earthworks, Fort Hill, and Southern Ohio Museum offer the best experience, though these can benefit from improvements. For example, similar archeological sites like Cahokia or Aztalan feature reconstructions, such as lodges or parapet walls, that help to interpret the sites and living conditions of their occupants. Other installations, like the observation tower at Serpent Mound, provide a unique perspective to help view the site. Discussions with site managers and archeologists can help to identify accurate and desirable projects that will add interest to the sites.

19. Organize a loop tour/route of major sites

Even the best of the many sites warrant a stop of no longer than two or three hours, while other sites can be seen in a matter of



minutes. A touring route encourages visits to multiple areas and extends the trip to a full day or two-day visit. This tour can be designed to interpret a continuum of Native American history, including sites like Leo Petroglyph. There are Native American sites all over the region, though many are on private land and some of them will have little interest. Consistent and connected interpretation of the sites will weave them into one narrative.

20. Secure UNESCO World Heritage Site designation

Designation as a World Heritage Site will result in increased tourist traffic. This is an ongoing initiative with multiple partners.

21. Develop a museum worthy of a UNESCO site

Current museums at Hopewell Culture National Historical Park, Serpent Mound State Memorial, Fort Hill State Memorial, and the Southern Ohio Museum are small and feature mostly static displays. A new museum can combine static displays with interactive exhibits, traveling exhibits, and events. Rather than a single-site facility, a museum may be approached as a network of facilities at different sites, each focused on a different element of the culture and archeology.

22. Market the sites as appropriate for their level of development.

Most sites currently have a minimal degree of development, and it is important to not over-sell the experience as efforts to enhance the sites are implemented. This could lead to negative reputations that can be hard to later overcome. As sites and programming are developed, they can be marketed to selected audiences.

- ▶ **Create programs for school tours.** These sites can be marketed for school tours, with an associated teaching plan about Native American history, with a middle school or high school audience. Bringing students to the sites will create awareness among parents, who may have an interest in planning a trip to bring the family back to the site.
- ▶ **Market to bus tours.** As more resources are developed, the leading sites can be packaged for bus tours. These typically target a senior market and include an overnight stay with other activities, such as a performance of the Tecumseh Outdoor Drama.
- ▶ **Launch a media campaign to geographically- and topically-targeted publications.** As with outdoor activities, there are groups, media, and online forums dedicated to people with an interest in history and Native American culture. Marketing efforts should be directly targeting these.

Initiative 5: American History

Settlement of the Northwest, the Underground Railroad, Grant and the Civil War, mining and iron furnaces, the Ohio River's role in exploration and commerce, and the different cultures of the region are all stories worth telling. They add richness to the experience of Ohio's Wilderness. This initiative seeks to preserve important features and weave them into journeys to the area that may have a different primary purpose.

23. Draw attention to the region's rich history as part of its attraction.

Develop the region's history - the settlement era, Ohio River, Underground Railroad and African American sites, mining and iron furnaces, historic districts, and other assets - to package and enhance





experiences in Ohio's Wilderness. The region has a rich history, even if it may not be the reason for most travelers to visit. Components of that history can be woven into a trip to broaden the experience, creating the reputation that Ohio's Wilderness offers rich and diverse reasons to plan a trip.

- ▶ **Inventory, map, and interpret the region's history.** It is currently difficult to find information about the area's history and historic sites, either in tourism brochures or online. This information should be gathered and presented in ways that make it accessible. For example, materials could be developed around historic themes like the Underground Railroad and African American sites, Grant and the Civil War, mining and iron furnaces, or the settlement era. A guidebook and accompanying map can be provided in print or online.
- ▶ **Preserve the region's history.** Where measures have not already been taken, local organizations need to step forward to ensure that important historic sites are preserved. In some case, it may be desirable to acquire sites to preserve them and make them accessible to the public.

24. Build out the region's scenic byways, beginning with the Ohio River Scenic Byway

Many points of interest along the Ohio River Scenic Byway are tied to historical resources and events, and the byway offers a means of connecting them. There are numerous sites that can be packaged into the experience, to encourage greater travel along the Ohio River Scenic Byway, with side trips on local scenic loops.

- ▶ **Prioritize building out stops and features on the Ohio River Scenic Byway.** This task reinforces recommendations elsewhere, to identify, improve, interpret, and provide access to attractions along the corridor. History lends itself to telling stories across multiple sites, with the potential to encourage stops in the communities along the corridor.
- ▶ **Designate, sign, develop, and market local scenic loops.** Several historical events, as well as facets of local culture, can be connected to the byway as side trips. Examples might include some that have been already identified, such as Amish and Mennonite culture, Ulysses S. Grant and the Civil War, Welsh Heritage, and iron furnaces.

25. Create a unified approach to interpreting the Underground Railroad and African American sites.

Although these sites currently see light traffic, there is a great deal of interest in the stories behind them. Many sites are located along the Ohio River, and the stories can be woven into the byway experience. There is a somewhat piecemeal approach to the way these stories are now being told, where it is often at the county level, rather than telling a bigger story at a regional level.

26. Enhance the profile of U.S. Grant and settlement and Civil War era attractions

President Grant’s early years were spent in southern Ohio. Sites associated with Grant are small and isolated. They can be packaged with other resources to tell a story of life in the area from the early 1800’s through the Civil War. This broader approach will offer more content to interest visitors.

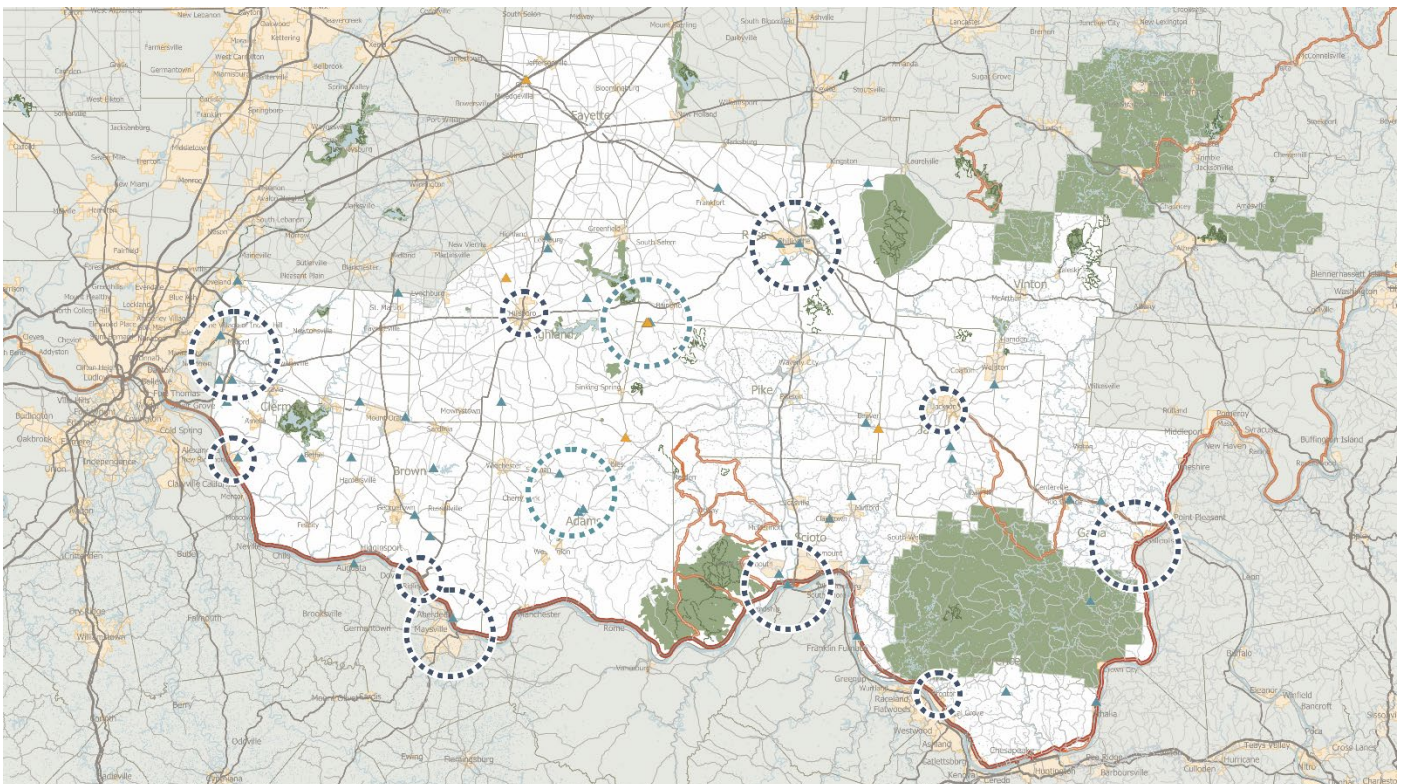
Initiative 6: Destination Downtowns and Shopping Districts

Communities aspire to have downtown business districts that are attractive, filled with interesting and thriving businesses, and leave a favorable impression of the community. Tourism contributes to making this possible by accessing spending from outside the normal market. Actions to revitalize downtowns to appeal to visitors will translate into new spending to support the business community.

The impression visitors get of a community is often shaped by nothing so much as its downtown district. Some of these assets are destinations themselves, while all serve visitors, extend stays, and capture spending. The area’s downtowns often struggle with empty storefronts and buildings in need of improvement. Downtown revitalization programs may be beyond the means of many small communities, but resources can be made available on a regional level to help coordinate and fund local efforts.

27. Transform downtowns to offer a quality environment with desirable shops, dining, and memorable landmarks

The initiative for revitalization must originate within the community, but programs can be developed regionally to offer support. Examples include shared staffing for a revitalization coordinator, access to funding sources, technical assistance teams, or promotional assistance. Heritage Ohio administers the Ohio Main Street Program and can help



to initiate the revitalization process with a resource team assessment, followed by an application to be designated an affiliate community.

28. Create programs for small businesses serving visitors

Many retail and dining businesses have the potential to capture visitor spending, but do not understand how to reach them or what they desire. Training and tools can be made available on a regional level to build that level of expertise, converting more travel into spending realized at locally-owned small businesses. These training programs can have interest well beyond the local area, and it may be possible to collaborate with universities or statewide organizations to develop these resources.

Other needs can be addressed directly through actions of the businesses. Examples include varying the merchandise to include more local, unique, handmade, and artisanal products from regional artists, crafters, or specialty foods makers, and adjusting hours to be open when visitors are willing to stop before leaving the area on Sunday. This last issue is important as the popular Amish and Mennonite shops are closed, and those businesses that are open can capture the available traffic.

29. Host events to draw tourists

Events are a good way to bring in visitors, and should be planned around both peak and off-peak visitor times. Peak season events seek to lure tourists from their destination to the district as a diversion. Off-peak events seek to bring tourist into the area when there is normally low levels of travel. Both have the purpose of bringing new customers to local businesses. Events appealing to visitors include the following.

- ▶ **Arts and crafts, food, and holiday-themed events.** Many of these events will not be a scale to be a significant tourist draw in themselves, however, they will attract people who are already in the area. To leverage their value, they should be scheduled at peak times of travel to nearby attractions, and there should be a concerted effort to convert foot traffic at the event into visits to businesses. The businesses must bear the responsibility for this.
- ▶ **Activity-based events (races, competitions, tours, etc.).** These types of activities have the potential to draw tourists, with the potential that many will stay overnight and patronize local businesses. The Cardboard Boat Regatta in New Richmond is an example.
- ▶ **Events with a regional scope.** Complimentary events in multiple places can compound their ability to pull visitors from outside of the area. These are often organized around food (craft brews and wine, harvest festivals, cook-offs) or holidays. As an example, Ohio's Wilderness has a great many ghost stories, haunted places, the Mothman, and other legends around which a regional Halloween event can be created.
- ▶ **Challenges.** It is increasingly popular for outdoor recreation sites to be marketed with challenges. These typically invite participants to either visit a certain number of sites, or to compete some physical challenge. The North Country Trail Association (the North Country Trail and Buckeye Trail run together through Ohio's Wilderness) has a Hike 100 Challenge that rewards people who hike a total of 100 miles on the trail within the calendar year. Others may present similar monthly challenges, offer scavenger hunts to find a list of



items, or simply invite people to visit during a given time. Often, the challenge is accompanied by active social media sites where participants are encouraged to post photos and comments about their visits.

Initiative 7: Agricultural Tourism

Agri-tourism and food-based tourism are among the fastest-growing components of leisure travel. Ohio's Wilderness has many farm-based attractions, markets, orchard and berry farms, and nurseries, as well as unique local restaurants, bakeries, and locally-made food products offered in shops. Efforts to promote related travel should go beyond marketing, to also support the formation and growth of businesses and attractions appealing to the market.

Increased tourism is only one benefit of this initiative. Agri-tourism and value-added agriculture enhance the profitability of farming and attract visitors who generate spending in the local economy. These businesses have the potential to grow, creating new demand for agricultural products, and new jobs in the area's communities.

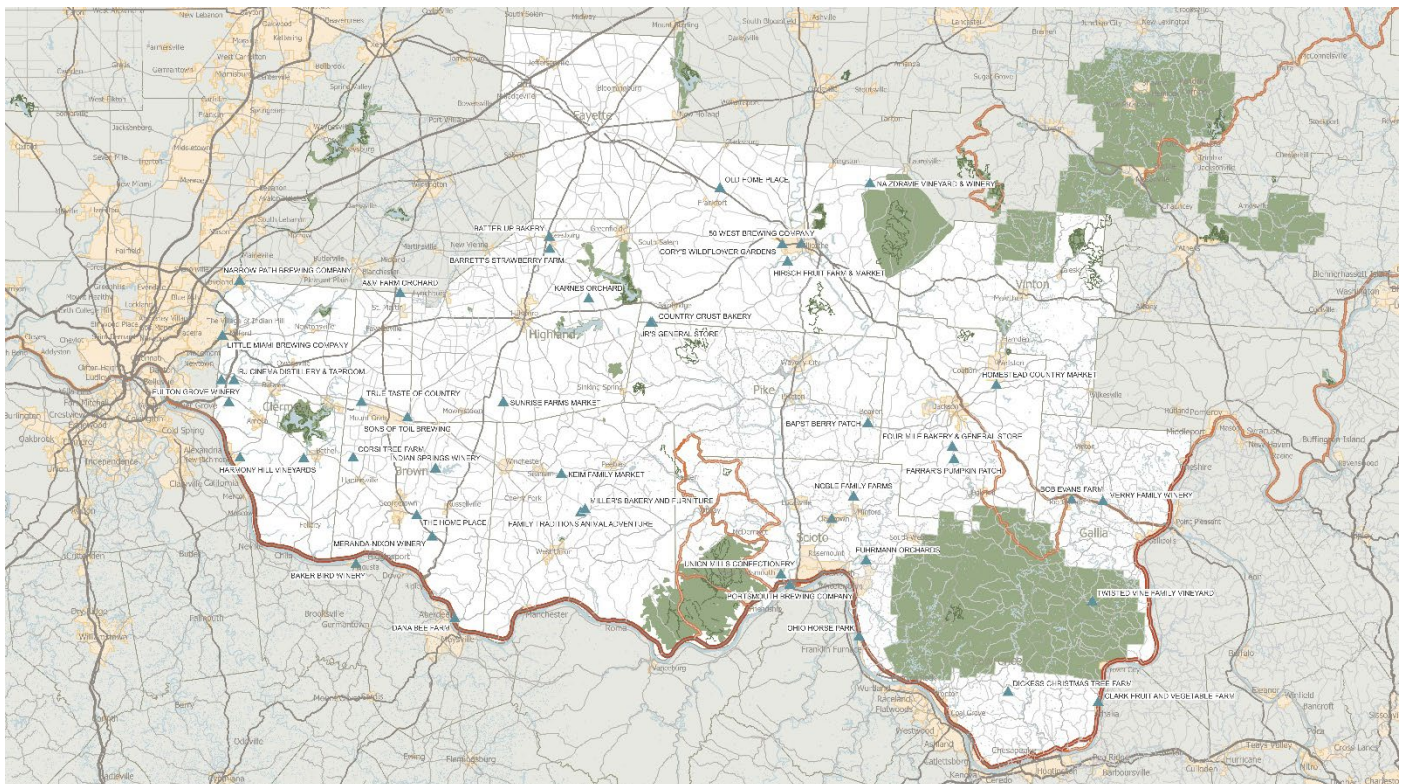
30. Capitalize on the great number of existing assets

The region already offers a significant base of these businesses to begin marketing with confidence that visitors will respond well to the offerings. The success of these businesses will spur others to start complimentary businesses.

- ▶ Amish and Mennonite shops
- ▶ Breweries and wineries
- ▶ Farm markets, orchards and berry farms
- ▶ Farm-based attractions (corn mazes, rides, petting zoos, etc.)
- ▶ Farm stays

31. Implement a regional roadside signage program

Travelers often do not know of the businesses before arriving. Good signage can help to prompt spur-of-the-moment stops. A regional signage program builds identity, informs potential customers, and expands upon the marketing



capacity of the business. Signage should be consistent across the region, incorporating elements of the regional brand. Because some of the venues may be seasonal, and they are often located off main highways, there should be an indication of when the business is open.

32. Create events related to the agricultural and ag-processing sector.

Efforts can seek to link food and agricultural businesses to events in the region, whether by adding to existing events or creating new ones, such as food-themed events or contests. Ideas to explore would include:

- ▶ **Local food.** Add agri-tourism elements to existing popular events, such as by selling local food products (beer, wine, meats, baked goods, etc.) or having contests related to local produce, such as a baking contest using local fruit.
- ▶ **Passports and trails.** Cross-visitation can be promoted through trails and passport programs. A trail, such as a fruit orchard trail or brewery trail, simply maps and links similar kinds of ag businesses. They can be unique, such as the Donut Trail in Butler County, Ohio. There are many bakeries in the twelve counties.

Passport programs take a trail to a higher level, challenging people to visit all of the listed businesses and receive a stamp. Some discount or other promotion may be given with participation in the passport program, and those who complete it are presented with some token reward.

- ▶ **Themed events.** There is an opportunity to create regional, as well as local events tied to an agri-tourism theme. These are often related to specific harvest seasons, but could target other times. The Hood River Valley in Oregon has an annual Blossom Festival, incorporating several communities and farm-based sites, when the fruit orchards are in bloom. Several wine regions celebrate the release of their new wines, beginning in the winter months when travel is otherwise slow.

33. Utilize topical marketing resources

There are existing statewide marketing initiatives related to agri-tourism and culinary tourism, sponsored either by state tourism agencies or industry organizations. Very few businesses in the twelve counties are even listed, much less purchasing advertising in these publications or websites. This creates an impression that there are no related businesses in the area, hurting the region as a whole, in addition to individual businesses. Businesses should be encouraged to participate, and at a regional level, it is possible to purchase advertising pitching sites in Ohio's



Wilderness, and linking to web-based resources with details about all of the region's ag-based tourism businesses and attractions.

34. Establish economic development programs to develop these businesses

Agri-tourism is unique in that it can lead to the creation of jobs in manufacturing and other activities that are the usual focus of economic development. Specialty food producers often get their start manufacturing under a cottage industry law that allows production of some foods outside of commercial facilities. At this scale, farm stands and farmers markets, local stores, and cooperatives are the common route to the consumer. Greater foot traffic (tourism) creates a larger market and more sales, allowing the business to get established, grow, and transition to commercial production. Economic development can support the formation and expansion of businesses in this market. An agriculture-based economic development program will focus on different stages of production and scale.

- ▶ **Agricultural diversification.** Specialty crops and livestock lead to value-added processing. Fruits, vegetables, and fiber-producing livestock (sheep, alpacas, etc.) are common examples, although organic production can even include traditional commodity crops. While education is the most common approach to fostering diversification (generally through, or with the participation of the state's agricultural extension program), some local areas have created incentive programs, such as property tax rebates, to provide financial support during the transition period when conventional farmland is converted to producing specialty crops.
- ▶ **Value-added startups.** Most small specialty food businesses start in the home. This provides constraints for even small-scale production, and is a factor in limiting growth. Economic developers often overcome the challenge by developing shared-use kitchen incubators. These licensed facilities may include resident businesses and/or lease space by the hour or day, lending small producers access to a professional environment and preparation and packaging equipment they may not own. Most offer other startup and incubation services and some have programs for the general public as well.

Funding for commercial kitchen incubators is made available by the U.S. Economic Development Administration and others. There is a two-step process. A feasibility study is needed to determine the market and financial viability of a proposed incubator, and to develop a framework for the facility, governance, and programming to be provided. The second step is to develop and implement a program. Grant funding is available for both steps.

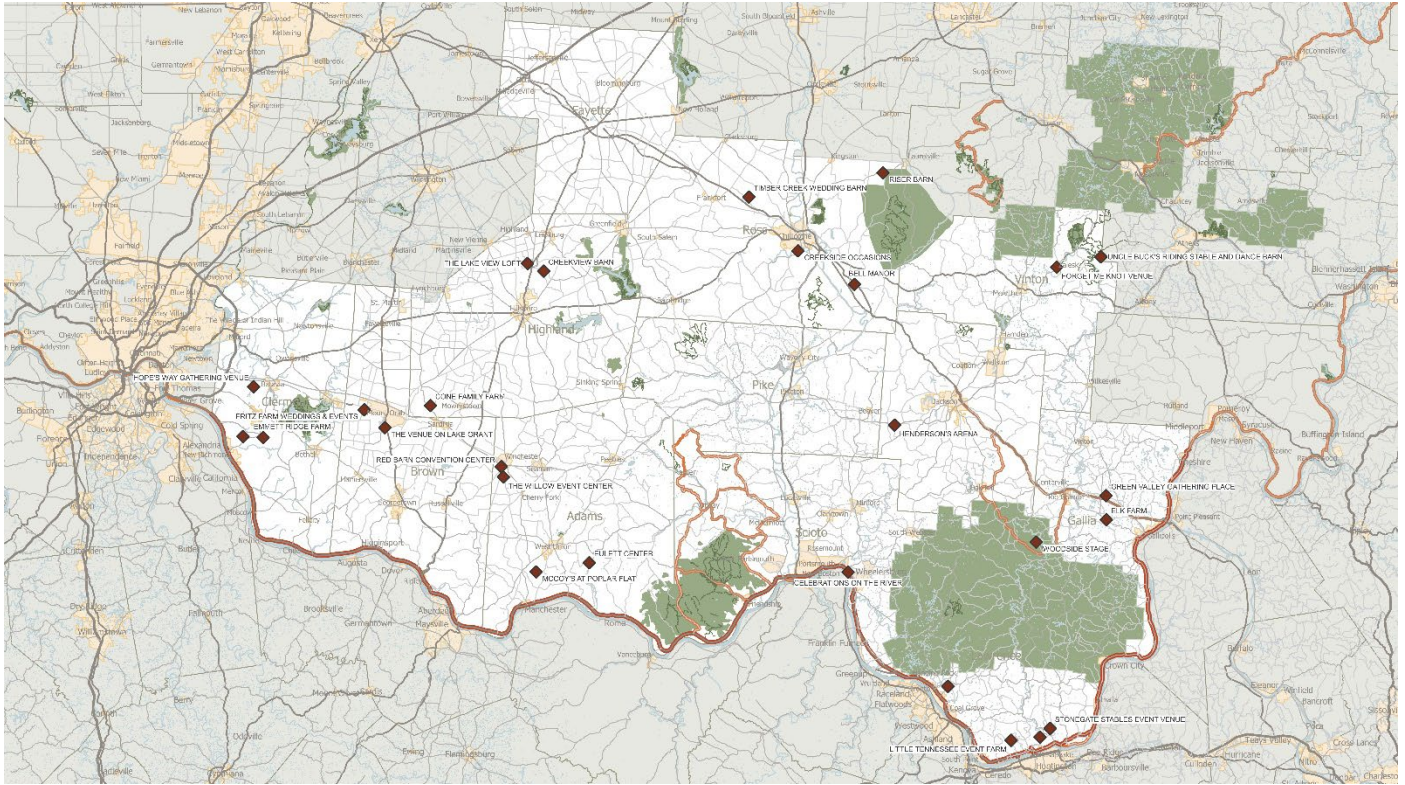
- ▶ **Commercial production.** Traditional economic development roles focus on scaling small operations to a size where they are manufacturing for commercial distribution. Programs can address market development and capital investment. These roles can be facilitated with an incubator program that also has business acceleration capabilities.
- ▶ **On-farm tourism.** Tourism-related activities can help to diversify farm income, which can be an important consideration, especially if a crop has a limited season. Income from other activities helps to stabilize cash flow and provides a hedge against years with poor crop profitability. Examples include farm stays (ex., guest cottages) and farm-based event venues. Economic development partners can provide startup assistance, while tourism officials can ensure that these activities are marketed to visitors.

Initiative 8: Event Venues – Places to Gather and Celebrate

There are event venues scattered throughout the region, which often seem to have no connection to local tourism programs. Most are poorly marketed. They include both general (wedding and family event) and specialized venues (horse barns, stages, etc.) in a variety of settings. Few cater to a potentially large business meeting market. These venues can bring a greater volume of small events and travelers to the region.

35. Reinforce the wedding and family event market, but build a weekday business meeting/retreat market

There is an opportunity to grow the market for family events and weddings, which are almost all going to be weekend events. Few venues are attempting to reach the business market, which would create weekday bookings. Most of Ohio's Wilderness is no more than two hours from the major metropolitan areas of Cincinnati, Dayton, and Columbus,



where there are a great number of large businesses needing venues in which to hold training sessions, business meetings, and other corporate events. Many of the area's venues would be suited to these events, but are not attempting to reach the market.

- ▶ **Work with venues to enhance their marketing – make use of industry sources.** There are countless wedding and event websites and publications, but they are not being effectively used by existing venues, which should be listed with a complete profile.
- ▶ **Host presentations and tours for meeting planners.** Meeting planners are a key audience for marketing outreach. Familiarizing them with the available venues and support services in the area (florists, caterers, etc.) is an important means of increasing event bookings.



- ▶ **Conduct direct outreach to corporate targets.** Large corporations should be contacted directly with information about the most suitable locations capable of hosting business events.
- ▶ **Market the region as a place for events.** Tourism marketing should promote the region as a destination for weddings, social events, and small business meetings. This should include advertising in relevant publications. As part of a regional approach, there needs to be a web-based directory of venues in the twelve counties, with details concerning the venue size and capabilities, lodging in the area, costs, and amenities both on-site and in the vicinity.

36. Assist venues that host public events such as performance spaces and conference centers

A few of the region’s venues provide performance space or offer space large enough to host conferences and other events. Because of their larger scale, these events have a greater impact on visitation and spending in the market. Tourism organizations should work together with these few venues to promote them and help to acquire new event bookings.

37. Link event venues to attractions and businesses that might be of interest to the people attending

Local tourism organizations can help to connect customers, venues, and the local services needed to host an event. For example, events will often require the services of caterers, florists, DJs or entertainers, and others. There is also an opportunity to make customers aware of nearby attractions that could be of interest to their guests.

Tourism Marketing

Visitors rarely think of their destination as a county. Instead, they are visiting a destination like a state park, or a vaguely-defined region such as Appalachian Ohio, where they may seek out multiple sites. Marketing branded or organized as a county may completely miss the visitor, who may not be aware of the county they are visiting. Tourism organizations can be far more effective by collaborating to create marketing around regional destinations and activities. Doing so can also be more cost effective, such as when multiple county brochures might be replaced with a single regional piece, freeing funds to be used in other ways, to market or to develop assets.

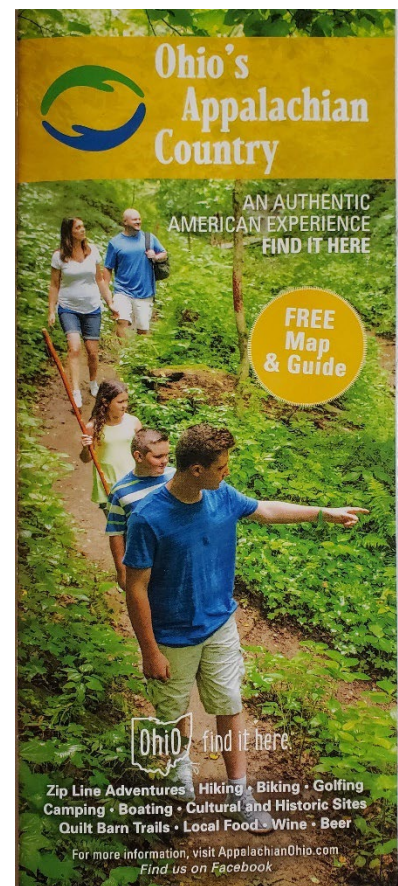
Several marketing recommendations were included in the destination development initiatives. The following ideas relate to an overall approach.

38. Create a regional brand.

The twelve counties should invest in the brand research and development to establish a regional brand. The Ohio’s Wilderness theme for this report may serve as a starting point. It was created based on the region’s tourism assets, discussions with stakeholders, and analysis of the visitor market. A full program of brand research will delve further into market response through focus groups and other research techniques. Along with a moniker, it will identify messaging resonating with the audience, and design assets such as a logo, style guide (fonts, colors, etc.), and image guidelines, resulting in consistency across marketing efforts.

39. Market on a regional and subregional level.

While it is important for the region to share an identity, it is a very large area to embrace in a single trip. The region can be divided into three to five subregions sharing traits such as topography, larger assets like the Wayne National Forest, and similar characteristics. These areas can overlap to an extent, so that parts of some counties may lie within two or three subregions. Marketing at a subregional level can focus on its unique assets and itineraries that can be completed in a day or weekend trip.



40. Shift from county-based marketing to collaborations.

Current efforts marketing tourism at a county level are less effective than would be collaborative marketing at a regional and subregional level. As an example, the content of multiple county brochures could be reorganized into one or two pieces similar in style, but ignoring county lines and instead marketing regions like Appalachian Ohio, Forest Trails, or Ohio River Country. Potential visitors will more easily recognize these destinations and are more likely to pick up and browse the material. It presents a larger and more attractive destination than a guide limited to a single county, and the cost savings from replacing several county pieces with just one or two shared pieces will allow each county to reallocate funds to other projects.

41. Market activities, along with destinations.

Activity-focused marketing will appeal to enthusiasts who may have otherwise not considered a trip to Ohio's Wilderness. A few sites and counties in the region have started to do this. Activities for which there are the resources, and the demand to create focused marketing, include:

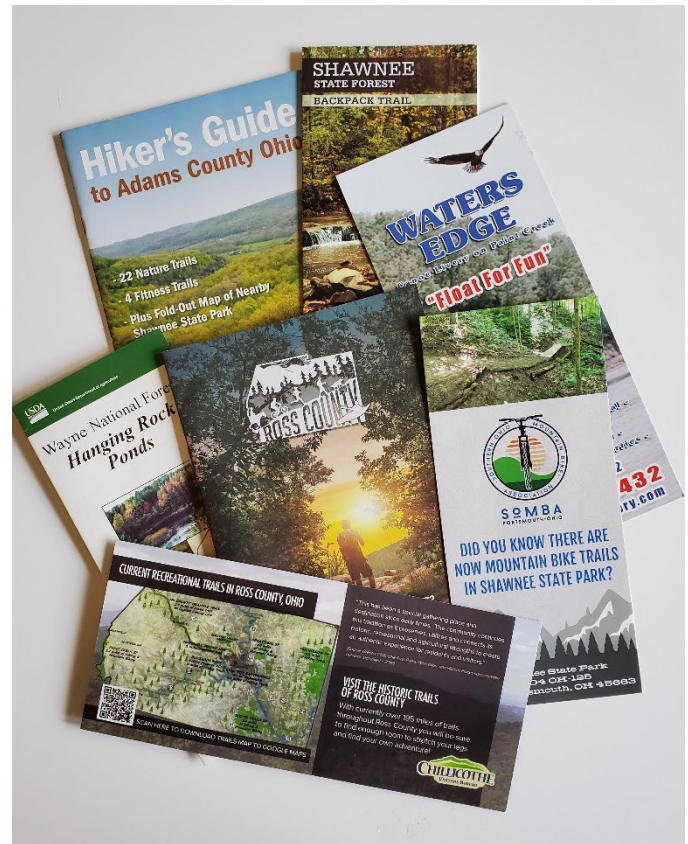
- ▶ Hiking and backpacking
- ▶ Mountain biking
- ▶ Horseback riding
- ▶ ATV riding
- ▶ Canoeing and kayaking
- ▶ Road-tripping or motorcycling

Recently, there has been a trend to expand this idea to specific subsets of the tourism market. Family tourism may be the most recognizable, but the concept has been applied to activities for seniors, for those traveling in RVs, and those traveling with pets. About a quarter of U.S. Households have a dog, and 95 percent will take their pet on at least one overnight trip during the year.

42. Compile a tourism contact database.

Visitor contact information should be collected whenever possible to build a contact database, administered at a regional level, and used to market tourism across the area.

- ▶ **Approaches to data collection.** Data can be collected in many ways. Every tourism website should have a form for users to submit their data, which can be automatically added to a regional database. Where it is not, local agencies should be encouraged to share their contacts. Contact information can also be collected through logbooks at visitor information centers and attractions.
- ▶ **Contents of the database.** At a minimum, the database should include the contact name and email address. The use of check boxes will enable them to indicate places and activities in which they have an interest, which can be used to target marketing.



- ▶ **Use of the database.** The database should be used for regional/subregional marketing purposes, even while highlighting local attractions and events. As an example, one email may be sent monthly to highlight events in the region, while another can be focused on seasonally-appropriate destinations and activities.

Organizing for Regional Tourism

Most tourism organizations receive their funding through local governments, and experience pressure to market as their community or county, rather than as a region. Still, working as a region presents a richer destination and stretches resources well beyond what can be accomplished in any single organization. The challenge, for many, will be to shift funds from purely local efforts to ones involving several partners. The framework recommended here is intended to suggest an approach that retains local independence while working collaboratively.

43. Create regional and sub-regional coordinating councils.

The needs for asset development and marketing fall along a continuum from local communities to the entire twelve-county region. A structure and process is needed to encourage collaboration and coordinate joint efforts. The recommended approach establishes a hierarchy of “coordinating councils” to convene stakeholders, establish priorities for collaboration, and pursue implementation.

- ▶ **Regional coordination.** Ohio Valley Regional Development Council can take the lead in bringing together tourism officials representing each of the twelve counties. This group should take the lead in pursuing recommendations that span the region, or multiple subregions. It can advocate for projects that develop tourism assets and capacity, and for funding through the State of Ohio, Appalachian Regional Commission, Economic Development Administration, and other sources.
- ▶ **Subregional coordination.** Many of the marketing and asset development initiatives are meant to be carried out at a subregional level, as collaborations between two or more counties and other partners. The strategy recommends defining three to five subregions within the twelve counties. Each of these can have their own tourism councils to promote joint marketing and asset development initiatives. In addition to county and local tourism representatives, these groups should include other key stakeholders, such as representatives of the Forest Service, Ohio Department of Natural Resources, Ohio Department of Transportation, Edge of Appalachia and Arc of Appalachia, Heritage Ohio, and other significant attractions found in the area.

44. Align development goals to planning and funding sources and partners.

Many initiatives can look to funding from outside sources such as state and federal agencies. These, and others, may also require actions on the part of specific agencies. Examples of these may include:

- ▶ Campground, trailhead, and other improvements at state and federal parks, forests, and recreation sites.
- ▶ Transportation investments to build out turnouts, rest areas, or wayfinding signage.
- ▶ Construction of new assets such as off-road bicycle trails or launch sites on water trails.

It is imperative that desired improvements be included in the planning conducted by these organizations, which is often conducted years ahead of construction. Specific projects should be identified at each site and incorporated into physical, strategic, or capital improvement plans. Projects that may seek federal funds should be included in the Comprehensive Economic Development Strategy (CEDS).

45. Cultivate economic development partners to assist in tourism business development.

Local, county, state, and federal economic development agencies, along with colleges and universities, have resources and capabilities to support agricultural diversification, business district vitality, and tourism business development initiatives identified in the strategy. Tourism officials need to enlist stakeholders, including local governments, in establishing tourism as an economic development priority, identify programming needs, and work collaboratively with relevant agencies to build capacity. This may require building alliances across multiple agencies to address issues that are regional in their scope.

46. Conduct continual market research.

The research conducted for this strategy was largely based on mobile device tracking, with a limited amount of qualitative research due to limitations imposed by pandemic restrictions. Moving forward, local and regional programs will want to continually supplement the research to understand perceptions of the market, in addition to updating quantitative data about visits. There are several techniques that may be employed, depending on the kind of insight that is sought.

- ▶ **Visitor logs.** Visitor logs at attractions collect information about the traveler’s home location and travel party size (number of people and pets), and may request an email address or brief comments about the visit. While the amount of insight they provide is minimal, the cost is very low, and the logs can contribute to a contact database.
- ▶ **Website traffic.** All websites should be designed with the tools to monitor traffic and determine what information is of interest to visitors.
- ▶ **Web polls.** Web polls are short surveys, with one to three or four questions, that can be posted to websites or social media. They are intended to collect information related to a single topic. They often relate to a current issue, or specific site or activity.
- ▶ **Electronic surveys.** Electronic surveys are more comprehensive and complex than a poll. Surveys are usually conducted through an email database.
- ▶ **On-site counters.** Electronic beacons, optical sensors, and pressure-activated counters are used to estimate visitors to sites. These are effective at getting estimates of volume, but collect little other data about who is visiting, or the purpose of the visit.
- ▶ **Lodging data.** Smith Travel Research (STR) reports data related to hotel occupancy and rates, while AirDNA compiles similar data for short-term rentals. This information should be collected on a regional and subregional level and reported to local tourism organizations.
- ▶ **Social media monitoring.** Emerging techniques are using social media to understand visitor perceptions. Examples may include scraping the posts of people who have “checked in” at sites to construct word clouds revealing the most common terms associated with the place. Another technique searches for photos with geographic coordinates within a defined area, to: 1) map concentrations of what people are photographing; and 2) scrape the associated post for commonly used terms. These approaches require custom programming, as the service is not yet being provided by any vendors.
- ▶ **Mobile device tracking.** Tracking data was collected for 80 sites across the twelve counties in order to complete this analysis. That data was used in its raw form and incorporated into additional software to perform a more detailed analysis. It was mapped using a geographic information system to reveal visitor concentrations, examine draw (distance), build trade areas, and combine visitor information from multiple sites. The geographic data was incorporated into ESRI Business Analyst to determine visitor demographics and examine psychographic (market segment) and behavioral characteristics of visitors. This data is very



useful in assessing visitor volume, determining origins, and examining the visitor profile, but come at the highest cost. The region will want to consider updates at an interval of about every three years.

47. Adopt an annual action plan.

The action plan should reflect local, subregional, and regional goals and actions for the current year, and longer-term initiatives. The focus should be on actions that require collaboration, identifying responsible parties, action steps, the resources required, and measures of success. The plan should be updated annually.

Strategy Summary

The following table offers a summary of the ten initiatives and 47 recommendations in the strategy. Along with listing the recommendations, the table identifies one or more issues that the recommendation addresses, including public asset development, private asset development, economic development, marketing, research and planning, and organization for tourism development and promotion.

STRATEGY MATRIX

INITIATIVE	RECOMMENDATION	PUBLIC ASSET DEVELOPMENT	PRIVATE ASSET DEVELOPMENT	ECONOMIC DEVELOPMENT	MARKETING	RESEARCH AND PLANNING	ORGANIZATION
INITIATIVE 1: VISITOR SERVICES AND SENSE OF PLACE	1 Explore opportunities for new hotels, resorts, and similar lodging		X	X		X	
	2 Encourage private campgrounds to invest in upgrades		X	X			
	3 Provide marketing training and technical assistance to tourism businesses			X	X		
	4 Assist in tourism business development			X	X		
	5 Build out or improve on-site visitor information resources	X			X		
	6 Approach visitor information as a region				X		
	7 Install branded wayfinding guiding visitors to attractions and businesses	X			X		
	8 Improve cell and wi-fi coverage		X			X	
	9 Document, preserve, enhance, and promote elements of the landscape that establish a unique regional identity	X	X	X	X	X	
INITIATIVE 2: NATURAL AREAS AND OUTDOOR RECREATION	10 Invest in trail development (foot, horse, bicycle, water)	X				X	
	11 Promote scenic drives and motorcycle touring	X			X	X	
	12 Support outdoor recreation business opportunities		X	X			
	13 Create four-season recreational opportunities	X	X		X	X	
	14 Capitalize on activity-based platforms to promote the area				X		
INITIATIVE 3: DIVERSE VISITOR ATTRactions	15 Capitalize on investments in fairgrounds by expanding facilities and attracting new events	X			X		
	16 Implement new marketing approaches		X		X		
	17 implement affinity marketing programs		X		X		

STRATEGY MATRIX (CONTINUED)

INITIATIVE	RECOMMENDATION	PUBLIC ASSET DEVELOPMENT	PRIVATE ASSET DEVELOPMENT	ECONOMIC DEVELOPMENT	MARKETING	RESEARCH AND PLANNING	ORGANIZATION
INITIATIVE 4: NATIVE AMERICAN HISTORY	18 Evaluate the opportunity for restoration projects to create a more tactile experience	X				X	
	19 Organize a loop tour/route of major sites				X	X	
	20 Secure UNESCO World Heritage Site designation					X	
	21 Develop a museum worthy of a UNESCO World Heritage Site	X				X	
	22 Market the sites as appropriate for their level of development				X		
INITIATIVE 5: AMERICAN HISTORY	23 Draw attention to the region's rich history as part of its attraction	X	X		X	X	
	24 Build out the region's scenic byways, beginning with the Ohio River Scenic Byway	X			X	X	
	25 Create a unified approach to interpreting the Underground Railroad and African American history	X			X	X	
	26 Enhance the profile of U.S. Grant and settlement and Civil War era attractions	X			X	X	
INITIATIVE 6: DESTINATION DOWNTOWNS AND SHOPPING	27 Transform downtowns to offer a quality environment and desirable shops, dining, and memorable landmarks	X	X	X	X	X	
	28 Create programs for small businesses serving visitors		X	X			
	29 Host events to draw tourists				X		
INITIATIVE 7: AGRICULTURAL TOURISM	30 Capitalize on the great number of existing assets		X		X		
	31 Implement a regional roadside signage program	X			X	X	
	32 Create events related to the agricultural and ag-processing sector				X		
	33 Utilize topical marketing resources		X		X		
	34 Establish economic development programs to develop these businesses		X	X			
INITIATIVE 8: EVENT VENUES - PLACES TO GATHER AND CELEBRATE	35 Reinforce the wedding and family event market, but build a weekday business meeting/retreat market		X		X		
	36 Assist venues that host public events such as performance spaces and conference centers		X		X		
	37 Link event venues to attractions and businesses that might be of interest to the people attending		X		X		
TOURISM MARKETING	38 Create a regional brand				X	X	
	39 Market on a regional and subregional level				X	X	
	40 Shift from county-based marketing to collaboration				X	X	
	41 Market activities along with destinations				X		
	42 Compile a tourism contact database				X		

STRATEGY MATRIX (CONTINUED)

INITIATIVE	RECOMMENDATION	PUBLIC ASSET DEVELOPMENT	PRIVATE ASSET DEVELOPMENT	ECONOMIC DEVELOPMENT	MARKETING	RESEARCH AND PLANNING	ORGANIZATION
ORGANIZING FOR REGIONAL TOURISM	43	Create regional and subregional tourism coordinating councils					X
	44	Align development goals to planning and funding sources and partners				X	X
	45	Cultivate economic development partners to assist in tourism business development			X		X
	46	Conduct continual market research				X	
	47	Adopt an annual action plan					X

Part Two: Visitor and Asset Research



VISITOR PROFILE

Visitor home location data was used to compose a profile of tourists to Ohio’s Wilderness. This data was collected using mobile device tracking, which determines where that phone typically resides in the overnight hours. That location is defined as home, and those home locations were plotted for visitors to a sample of attractions in the twelve counties. The locations were clipped to create a trade area which excluded people living within the twelve counties. The trade area was used to examine characteristics of the population using ESRI Business Analytics, including:

- ▶ Demographic estimates and projections.
- ▶ Psychographic profiles, or market segmentation, that groups households into categories based on similar characteristics and behavior patterns.
- ▶ Market indices, assessing recreation and leisure activity participation.

Trade Area

The bulk of visitors to attractions in the twelve counties originate in the metropolitan areas immediately north of the region. There are smaller concentrations of visitors from Cleveland, Toledo, and Detroit, with pockets in Indianapolis, Fort Wayne, Chicago, and Pittsburgh, along with smaller communities and rural places in the states neighboring Ohio. Aside from places along the Ohio River, there are far fewer visitors from states to the south. Outdoor destinations such as the Red River Gorge, Daniel Boone National Forest, and New River Gorge may be outcompeting similar outdoor attractions in Ohio’s Wilderness.

It is worthwhile to compare the trade area for Ohio’s Wilderness with the locations from which Hocking Hills State Park is drawing visitors. In general, Hocking Hills is able to draw from a greater distance, especially into states like Indiana and Michigan, as well as more heavily within the same territory covered by Ohio’s Wilderness. This comparison reinforces the desirability of a strategy that links Hocking Hills to nearby sites in Ohio’s Wilderness, encouraging visitors to Hocking Hills to explore further south.

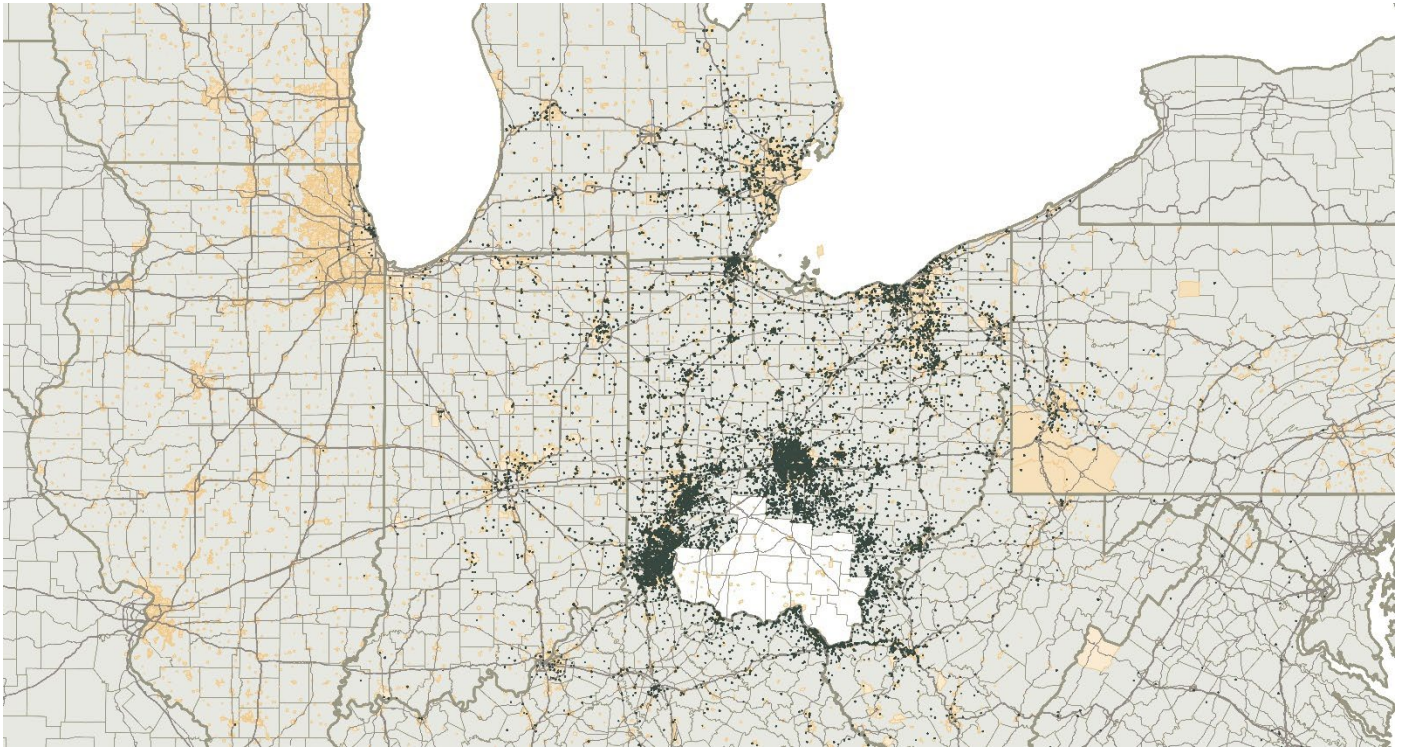
Visitor Demographics

Tourists drawn from outside the twelve counties differ demographically from visitors to attractions who are drawn from within the region. They tend to be younger, more racially diverse, less likely to have children in the household, and live in urbanized areas. Tourists earn more and spend more on travel, even though still less than the U.S. average.

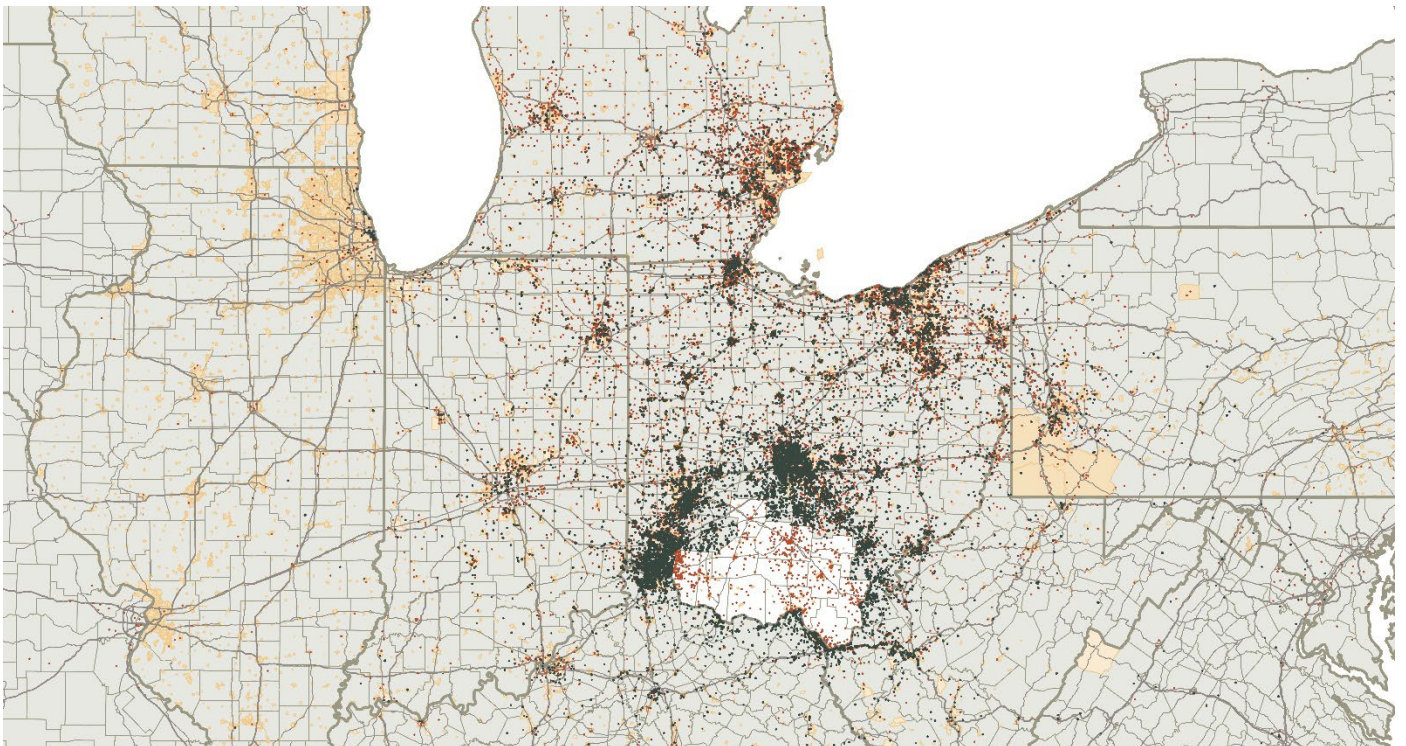
COMPARISON OF VISITORS FROM OUTSIDE OF THE REGION (TOURISTS) TO VISITORS FROM WITHIN

<u>CHARACTERISTIC</u>	<u>OUT-OF-REGION</u>	<u>IN-REGION</u>
2021 Population	2,840,168	418,544
2021 Households.....	1,149,549	165,725
Average household size.....	2.36 persons	2.47 persons
Households with children under 18 years.....	29.8%	33.7%
Median age.....	36.0	40.6
Race: White.....	75.1%	93.4%
Black.....	14.9%	2.5%
Other.....	10.0%	4.1%
Hispanic origin.....	4.8%	1.9%
Rural population.....	2.3%	30.7%

ORIGINS OF VISITORS TO OHIO'S WILDERNESS



ORIGINS OF VISITORS TO OHIO'S WILDERNESS AND HOCKING HILLS STATE PARK (IN RED)



COMPARISON OF VISITORS FROM OUTSIDE OF THE REGION (TOURISTS) TO VISITORS FROM WITHIN

CHARACTERISTIC	OUT-OF-REGION	IN-REGION
Median household income.....	\$61,295	\$54,334
Median disposable income	\$51,320	\$45,298
Average travel spending.....	\$2,318	\$1,974
Travel spending index (100 = U.S. Average).....	96	78

Psychographic Profile (Market Segmentation)

Market segmentation is a process in which people in a trade area are grouped according to common attributes, based on demographic and survey research. ESRI is one of several vendors providing this analysis, which it has branded as Tapestry Segmentation. The dominant segments in the visitor trade area (out-of-region) are contrasted here with those of people from within the twelve counties. Summary descriptions of the segments follow, and detailed descriptions can be found online at <https://doc.arcgis.com/en/esri-demographics/data/tapestry-segmentation.htm>.

DOMINANT TAPESTRY SEGMENTS OF VISITORS TO ATTRACTIONS

OUT-OF-REGION VISITORS (TOURISTS)

TAPESTRY SEGMENT	PERCENT	TOTAL
Rustbelt Traditions	8.3%	8.3%
Traditional Living	7.2%	15.5%
Metro Renters	4.8%	20.3%
Hometown Heritage	4.4%	24.7%
Emerald City	4.1%	28.8%
In Style	4.0%	32.8%
Workday Drive	3.8%	36.7%
Bright Young Professionals	3.5%	40.2%
Comfortable Empty Nesters	3.4%	43.6%
Set to Impress	3.3%	47.0%
Dorms to Diplomas	3.3%	50.3%
Old and Newcomers	3.2%	53.4%
College Towns	2.9%	56.3%
Heartland Communities	2.9%	59.2%
Savvy Suburbanites	2.8%	62.0%
Midlife Constants	2.8%	64.8%
Small Town Simplicity	2.7%	67.4%
City Commons	2.3%	69.7%
Up and Coming Families	2.2%	71.9%
Young and Restless	2.0%	73.9%

IN-REGION VISITORS

TAPESTRY SEGMENT	PERCENT	TOTAL
Heartland Communities	10.9%	10.9%
Small Town Simplicity	10.4%	21.3%
Southern Satellites	8.4%	29.7%
Salt of the Earth	8.1%	37.8%
Midlife Constants	6.6%	44.4%
Old and Newcomers	5.9%	50.3%
Traditional Living	5.1%	55.4%
Middleburg	4.0%	59.4%
Rural Bypasses	3.6%	63.0%
Workday Drive	3.5%	66.4%
Rooted Rural	2.9%	69.3%
Green Acres	2.8%	72.2%
Comfortable Empty Nesters	2.6%	74.8%
Bright Young Professionals	2.5%	77.2%
Down the Road	2.5%	79.2%
Professional Pride	2.4%	82.1%
Savvy Suburbanites	2.1%	84.2%
Hometown Heritage	2.0%	86.2%
Rustbelt Traditions	1.8%	88.1%
Parks and Rec	1.2%	89.3%

Tourists are a more diverse population, compared to local visitors to attractions, with a smaller percentage of the total in any of the top segments, and the top 20 segments accounting for 73.9 percent of the total. With the local visitor population, the top four segments make up more than half of the total, while 89.3 percent of the total are covered by the 20 largest segments. There are also significant differences in the segments, with thirteen overlapping, and seven of the top 20 unique to each group.

A total of 67 Tapestry Segments are classified by 14 Lifemode Groups, creating a hierarchy that is useful in defining each segment. Not all 14 Lifemode Groups are found in the tourist or local market.

- ▶ **Affluent Estates.** This group has the highest income, and has established wealth. It is made up of educated, well-traveled couples living on the suburban periphery. The Savvy Suburbanites segment is found in the local and tourist market, while the local market also includes Professional Pride.
- ▶ **Upton Individuals.** Metro Renters is the segment included in this group, and it is only found among tourists. This segment is made up of mostly young singles, with college degrees, living in large metropolitan areas. Incomes are slightly below average, which corresponds to the young age and single-person households.
- ▶ **Family Landscapes.** This group is only found locally, within the Middleburg segment, in the Workday Drive segment in both markets. It is comprised of younger married households living in newer housing on the suburban periphery. Their young age is a factor in an income below the national median. They tend to have a college degree.
- ▶ **Gen X Urban.** These households are middle-aged, with children often out of the home. The group includes Comfortable Empty Nesters, Rustbelt Traditions, and Midlife Constants found among both tourists and local visitors to attractions. The In Style segment is found among tourists, while the local market includes Park and Rec. They live in city to suburban settings, may have college degrees or high school diplomas, and have incomes near or below the median.
- ▶ **Cozy Country Living.** This Lifemode contains segments unique to the local market, including Green Acres and Salt of the Earth. Heartland, Communities, the largest local segment, is also found among tourists. These are empty nester households in rural places. Incomes vary from at the median to well below, and most have only a high school degree.
- ▶ **Ethnic Enclaves.** The only segment from this group to appear in either market is Up and Coming Families, among tourists to the area. These are diverse young families with a median income.
- ▶ **Middle Ground.** This is a group mostly comprised of people in their thirties, living in cities or suburban settings. The Bright Young Professionals, Hometown Heritage, and Old and Newcomers segments are found in both markets, while tourists include Emerald City. Although all of these segments tend to have a college degree, they have a lower-middle income profile. They mostly live in cities and tend to be single or couples without children.
- ▶ **Rustic Outposts.** Older families, living in older homes in rural areas make up the bulk of this group. The Southern Satellites, Rural Bypasses, Down the Road, and Rooted Rural segments in this group are only found in the local market. The group has a low income profile. They tend to have only high school diplomas.
- ▶ **Midtown Singles.** Set to Impress, City Commons, and Young and Restless segments found in the tourist market are in this group, which is made up of single, diverse Millennials from urban areas, with a lower income profile. Most only have high school diplomas.
- ▶ **Hometown.** The Traditional Living and Small Town Simplicity segments are found among both tourists and local visitors. They are lower-income, single households growing up and staying close to home. Most only have a high school degree and are close to the median age.
- ▶ **Scholars and Patriots.** The Dorms to Diplomas and College Towns segments are found among tourists to the region. They are from cities and suburban areas with a college population. They are among the youngest segments, having low incomes as a result, though they have some college or a college degree.

Recreation and Leisure Interests

ESRI has compiled survey research based on its Tapestry Segmentation, gauging interest in various leisure activities. This takes the form of a market potential index, where an index of 100 is the national average. A value higher than 100 indicates a greater likelihood of participation in the activity, while a value below 100 indicates less interest. This insight is helpful in determining which sites and activities to promote to the visitor market, and also in prioritizing development projects that may serve either visitors or tourists.

SPORTS AND LEISURE MARKET POTENTIAL

ACTIVITY	OUT-OF-REGION (TOURISTS)			IN-REGION VISITORS		
	NUMBER	PERCENT	MPI	NUMBER	PERCENT	MPI
Canoeing / kayaking	172,111	7.6%	114	21,319	6.5%	98
Backpacking	91,125	4.0%	113	9,500	2.9%	83
Frisbee	94,666	4.2%	112	10,572	3.2%	87
Horseback riding	55,482	2.5%	107	7,674	2.4%	102
Birdwatching	110,223	4.9%	107	15,800	4.8%	106
Road biking	226,857	10.1%	106	27,610	8.5%	89
Attended state or county fair	323,230	14.3%	105	47,819	14.7%	107
Rock music performance	240,320	10.7%	105	30,470	9.3%	92
Went to art gallery	173,753	7.7%	104	17,334	5.3%	72
Archery	61,399	2.7%	104	9,875	3.0%	116
Live theater	286,960	12.7%	103	33,478	10.3%	83
Attended auto show	133,609	5.9%	103	18,915	5.8%	101
Power boating	108,887	4.8%	103	15,180	4.7%	100
Dined out	1,171,119	51.9%	102	159,946	49.1%	96
Golf	190,991	8.5%	102	25,935	8.0%	95
Motorcycling	63,596	2.8%	102	9,970	3.1%	111
Country music performance	149,679	6.6%	102	23,240	7.1%	109
Hiking	289,820	12.9%	101	33,886	10.4%	82
Fresh water fishing	235,687	10.5%	101	41,226	12.6%	122
Photography	207,631	9.2%	101	26,424	8.1%	89
Hunting with rifle	84,630	3.8%	101	14,895	4.6%	123
Hunting with shotgun	70,934	3.1%	101	13,251	4.1%	130
Overnight camping trip	274,242	12.2%	100	39,343	12.1%	99
Mountain biking	84,759	3.8%	100	10,097	3.1%	82
Watch auto racing (not NASCAR)	168,246	7.5%	95	31,927	9.8%	128

Aside from hunting and fishing, the local population appears to be less engaged in outdoor activities, compared to the tourist population. This does reinforce the observation that people traveling to Ohio's Wilderness are coming for its outdoor attractions. Activities like camping, hiking, fishing, canoeing or kayaking, road biking, birdwatching, photography, and backpacking are activities with large numbers of participants. While these can be leveraged to draw tourists, it is worth noting their interest in other activities that could be added to a trip, or may be a reason to visit, such as county fairs, live music performances, auto racing, and live theater.

EXISTING AND PLANNED TOURISM MARKETING

The study area is diverse and includes a mix of more urban and rural counties, stretching from the Cincinnati metropolitan area in the southwest to Vinton County in the northwest. All but one of the twelve counties (Fayette) is located in Ohio's Appalachian country, a 32-county region hugging the Ohio River, where "rolling hills, mature forests, historic sites, small towns, wineries and farm to table restaurants await."



A majority of the counties within the study area have visitor centers, websites, social media accounts, and publish and/or participate in a variety of maps, guides, and brochures to promote the destinations, attractions, and businesses within the respective counties. Convention and Visitors Bureaus (CVBs) often contract with local Chambers of Commerce to provide tourism-related promotions. A short of summary of existing marketing initiatives is summarized by topic and county below. At the end of the section is a table summarizing planned future marketing activities by county.

Branding

The majority of counties have developed some branding for their tourism initiatives. either tag lines or brand descriptions to help differentiate themselves. Common themes include the Ohio River, recreation, history, discovery, and exploration.

- ▶ Adams: A patchwork of History and Nature
- ▶ Brown: Discover Brown County; Nestled along the banks of the Ohio River, Brown County, Ohio is rich with history and activities
- ▶ Clermont: Find your escape - At the center of it all
- ▶ Fayette: Fayette County is centrally located between Cincinnati, Columbus and Dayton; With an abundance of shopping, local dining favorites, must-see events, outdoor fun and more, there is something for everyone!
- ▶ Gallia: Located along the Ohio River in southeastern Ohio, Gallia County began as a haven for French settlers in 1790 and today is a getaway for travelers seeking a haven of their own
- ▶ Highland: A gateway to getaway
- ▶ Jackson: Whether you are looking for relaxation, rigorous outdoor activities, arts and culture or a really good meal, the city of Jackson, Ohio and the surrounding areas are packed with things to see and do and delectable eateries
- ▶ Lawrence: Ohio's Southern Coast
- ▶ Pike: Escape the ordinary; Thanks for joining us in the beautiful rolling hills of Appalachia in Southern Ohio
- ▶ Ross: Ohio's Appalachian Playground; Nestled in the foothills of the Appalachian Region, Ross County offers a beautiful destination to explore the great outdoors
- ▶ Scioto: The Ohio River at your feet, Shawnee State Forest at your back, and a whole lot of fun in between (Visitor Guide); If you are looking for some great art, great food, or great entertainment, Scioto County, OH, is the place for you! (CVB website)
- ▶ Vinton: Ohio's last frontier

Printed Marketing Materials

Each of the counties is producing a printed visitors guide, most in the form of a full-size glossy magazine. Most of these are posted online in PDF format and are updated on an annual basis. The distribution of advertising and informative content varies. Also, as some are designed both as a community guide and tourism guide, several also have content that is not of interest to a visitor. The level of detail is also an issue in some guides, which may discuss activities available in the area, but

then fail to provide specific information that visitors need in order to make a decision. As an example, the guide may reference hiking trails or fishing, but fail to identify and describe trails or public fishing spots. This can even be extended to photography in the brochure, which should include a caption with the location of the photo, in case visitors would like to see the site pictured.

A few counties have begun to compile information related to specific activities, such as hiking trails, water trails, scenic routes, motorcycle routes, and historic sites. Some attractions have created material that supplements that produced by the counties, such as some of the guides available for the Wayne National Forest or for the various Hopewell sites. Private attractions have produced material of varying quality. Most notably, there is virtually no printed material available on sites like the Arc of Appalachia or Edge of Appalachia, which have both low visitation and high potential.

Websites

Most of the counties in the study area have a tourism web presence. A few of the counties have multiple sites, which may include Chamber of Commerce content which overlaps with tourism information provided by the convention and visitors bureau. Only one site was seen to actively collect visitor contact information (to subscribe for a newsletter).

- ▶ Adams: adamscountytravel.org
- ▶ Brown: browncountyohiochamber.com/travel-and-tourism/
- ▶ Clermont: discoverclermont.com
- ▶ Fayette: visitfayco.com
- ▶ Gallia: visitgallia.com
- ▶ Highland: theprintshopwch.com/Highland/index.html
- ▶ Jackson: tourjacksonohio.com; jacksonohiochamber.com/visit
- ▶ Lawrence: visitlawrenceohio.com
- ▶ Pike: piketravel.com; visitpike.com
- ▶ Ross: visitchillicotheohio.com
- ▶ Scioto: ohiorivertourism.org
- ▶ Vinton: vintoncountytravel.com

There are also regional sites addressing parts, or all of Ohio's Wilderness, such as state tourism sites, those of organized areas like the Ohio River Scenic Byway or Appalachia, and privately-developed sites.

Most websites are organized around the same topics of attractions, events (calendar), shopping, dining, and lodging. A few have expanded content such as suggested itineraries or photo galleries. While most calendars are being maintained, those of a few counties do not have current event information. Many sites also rely on PDF files (the county brochure, trail guides, etc.) as a means to deliver information. This is often difficult enough on a computer, but can be very difficult to search and view on a handheld device.

Social Media

Social media has become an essential component of tourism marketing, both to push content to potential visitors, and for those visitors to share their experience. Facebook is the most prominent social media channel adopted by the area's county marketing organizations, consistent with national trends. In some cases, the Facebook page is not used purely for tourism promotion, and will contain a larger proportion of other information that will be irrelevant to tourists. This is true on other social media platforms as well. It does not appear that any of the counties (or attractions or tourism businesses) are dedicating marketing dollars to these platforms, which provide tools to allow them to target people both geographically and by their interests.

While not being utilized in most tourism marketing campaigns currently, Tik Tok is growing in popularity and is already in usage among local businesses. For example, Danbarry Cinemas in Chillicothe has over 684 followers, while Ohio River Outdoors has over 200. As the number of social media channels continue to grow, the more important it becomes for tourism marketing organizations to define clear social media goals and strategies. These should include pages dedicated solely to tourism, frequent content updates, use of quality photos and video, and advertising to targeted audiences through the platforms. Sites should also be used to engage page visitors in discussions and through polls, contests, and other means of outreach.

CURRENT SOCIAL MEDIA USAGE

COUNTY	FACEBOOK	INSTAGRAM	YOUTUBE	TRIP ADVISOR	TWITTER	PINTEREST	LINKEDIN	TIK TOK
Adams	X							
Brown	X				X		X	X
Clermont	X	X	X	X	X	X	X	X
Fayette	X	X						
Gallia	X	X	X					X
Highland	X							
Jackson								
Lawrence	X	X			X			
Pike	X		X					
Ross	X	X	X		X	X		
Scioto	X							
Vinton	X				X	X		

Future Marketing Plans

Attempts were made to reach each of the primary county tourism marketing organizations to identify future marketing plans. The following are items identified by those that responded.

- ▶ Adams: Re-designing website; building a new visitors center at Adams Lake State Park (2023); focusing on Ohio River tourism like Ripley, Augusta, Maysville
- ▶ Clermont: Submitting RFP for a new website to be completed by end of 2022; new guide coming out January 2023; leisure travel is strong and they are starting to look at meetings, with unique venues attractive to smaller groups
- ▶ Fayette: Continue to produce a visitor guide; strengthen and expand events; provide grant assistance
- ▶ Gallia: Expand marketing to a larger area; reach out to tour bus operators, packages, recruitment
- ▶ Lawrence: Build off of successful video campaign; better understand analytics; developing a county-wide recreational plan
- ▶ Ross: Leverage World Heritage designation; continue to promote outdoor recreation
- ▶ Scioto: Updating website including event calendar; advertise in other outlets including Great Lakes Guides, increase digital focus

VISITOR ASSET ASSESSMENT

While foot traffic data was collected for 80 sites, the consultant team visited, observed, and spoke with staff or visitors at many more sites in the region and along its borders, including attractions, retail and dining businesses, visitor centers, and hotels and campgrounds. This section of the report summarizes general observations and comments from stakeholders, in regard to the attractions in the area.

- ▶ Outdoor activities and natural resources are seen by tourism stakeholders to be the primary driver of tourism in most of the counties. This is confirmed by visitor data, though other sites (such as Destination Outlets, Jungle Jim's, or the Tecumseh! Outdoor Drama) are unique and very significant visitor destinations.
- ▶ Sites with higher foot traffic tend to have a higher state of development. In the case of outdoor attractions, this might include visitor centers or museums, restroom facilities and shelters, campgrounds with better infrastructure, or trailheads with restrooms and paved parking.
- ▶ Outdoor recreation sites with lower traffic volumes may be poorly developed. This would include both public and conservancy sites where signage is minimal, and where there may be little more than a gravel lot to mark a trailhead. In the case of water trails, some of the identified launch sites can be very difficult to access.
- ▶ Road signage is a problem across the region. As an example, there is no signage for Buckeye Furnace along Highway 32. Many other sites are similarly not identified from the primary routes through the region. There is a need for large, branded, consistent wayfinding signage to tie together sites in the region.
- ▶ Despite low overall visitation numbers, the Native American sites are drawing from a greater distance and have the potential to become much more significant contributors to travel in the area. Serpent Mound offers the best experience, with a good path and observation tower that enables the effigy to be seen in perspective. The other sites vary in the quality of their amenities and the experience they deliver. It will be worthwhile to compare them to similar sites in the nation, to identify features that can make a visit more memorable.
- ▶ While there is a great deal of seasonality to all of the sites, some shut down completely for part of the year, especially in winter. Expanding shoulder season traffic and building a market for the off-season are critical goals for any tourism organization. Holiday-themed events or attractions, and special events in the colder months can help to attract visitors.
- ▶ Hocking Hills is perhaps the best-known state park in Ohio, and is located on the edge of the region. Because of its popularity, it is also often crowded. Less-frequented sites such as those in the Wayne National Forest or Shawnee State Forest can be positioned as a crowd-free alternative for those who want to be alone in the outdoors.
- ▶ The area's downtowns can be positioned as the location for tourist-serving businesses, especially as unique shopping and dining concentrations. Much of that is dependent on preserving and enhancing the historic character of those districts. In cases where the decay has progressed beyond a point where an historic building can be saved, creative approaches can preserve the façade, while repurposing the space behind it.
- ▶ In general, fairgrounds are public assets receiving a great deal of investment that is being inadequately used to generate new visits. Recent foot traffic data indicated marked interest in using the campgrounds throughout the year. Because they are located in cities, they will be able to easily offer wi-fi or even cable television, and other amenities that are desired by RV travelers, but hard to provide in other places, where even cell coverage may not be available. Small investments to develop fairground campgrounds will have a significant return.
- ▶ While mobile devices have become the primary way in which people find attractions and businesses, the area's attractions and businesses are well behind their peers in developing an online presence. This extends even to such basic considerations as a website. Along with developing web and social media assets, sites and businesses should be providing online menus and ordering, reservations, and similar interactive components.

SUMMARY FOOT TRAFFIC DATA

ATTRACTION	ANNUAL VISITORS				FROM 50+ MILES	ONLY ONE VISIT
	2018	2019	2020	2021		
Adams County Fairgrounds	119,300	106,900	67,500	105,798	5.51%	16.11%
Adams Lake State Park	35,100	39,200	49,000	59,016	6.47%	19.90%
Adena Mansion	19,700	15,900	6,100	11,575	26.78%	69.61%
Atomic Speedway	76,600	82,200	66,700	67,867	31.97%	29.81%
Bob Evans Farm	271,900	262,200	129,200	239,320	33.02%	39.65%
Boneyfiddle Historic District	896,700	889,200	654,600	897,526	14.03%	9.23%
Brown County Fairgrounds	174,100	228,100	70,200	223,878	6.41%	17.81%
Brush Creek Motorsports	17,400	22,000	38,200	38,711	15.63%	24.75%
Buzzardroost Rock	2,850	2,850	2,850	2,372	33.59%	5.18%
Chalet Nivale	3,300	3,300	3,300	3,240	27.12%	3.31%
Chilo Lock 34 Park	13,500	16,000	15,100	15,335	7.04%	52.95%
Cincinnati Nature Center	131,700	139,600	130,200	170,782	6.88%	28.07%
Clermont County Fairgrounds	187,689	207,018	67,234	231,908	5.83%	23.66%
Deer Creek State Park	630,400	628,100	700,200	632,401	14.79%	15.24%
Destination Outlets	2,080,000	1,900,000	1,360,000	1,481,670	32.90%	41.25%
Dogwood Pass	21,500	30,700	35,500	33,638	41.07%	77.15%
Downtown Chillicothe	2,761,970	2,659,888	2,074,385	2,855,634	8.73%	5.17%
Downtown Gallipolis	1,040,000	1,120,000	928,200	1,073,155	8.71%	12.04%
Downtown Georgetown	206,800	196,700	157,200	204,193	4.60%	11.60%
Downtown Ripley	103,800	101,100	87,300	119,794	11.85%	15.39%
East Fork State Park	724,700	684,500	862,200	835,439	14.96%	11.63%
Family Traditions Animal Adventure	12,300	12,300	12,300	17,078	10.42%	2.81%
Fayette County Fairgrounds	275,541	238,756	134,463	206,541	7.25%	13.58%
Fort Hill State Memorial	2,800	2,800	2,800	2,400	45.55%	6.25%
French Art Colony	9,300	11,000	4,600	10,549	11.91%	50.65%
Gallia County Fairgrounds	160,396	164,468	88,822	181,303	7.52%	14.56%
Grant Birthplace	17,600	20,200	19,000	13,444	23.90%	58.53%
Grant Boyhood Home	4,900	5,700	3,900	3,119	26.46%	53.45%
Great Seal State Park	86,600	85,100	86,700	103,275	9.32%	17.12%
Highland County Fairgrounds	139,282	161,856	53,304	163,710	9.38%	15.27%
Highlands Nature Center	2,400	2,400	2,400	3,490	31.20%	3.73%
Hocking Hills State Park	493,300	535,300	551,100	1,219,549	77.15%	43.00%
Home Place Market	45,603	55,708	74,842	74,064	15.48%	24.23%
Homestead Country Market	48,500	59,800	75,000	68,650	12.54%	26.93%
Hopewell - Hopeton Earthworks	7,500	7,500	7,500	8,155	10.10%	1.07%
Hopewell - Mound City	30,500	19,900	13,300	20,983	47.29%	72.79%
Hopewell - Mound Group	14,900	19,900	26,000	22,600	4.73%	20.07%
Hopewell - Seip Earthworks	4,300	4,300	4,300	4,178	9.30%	6.65%
Indian Springs Winery	18,900	15,400	12,300	14,738	22.61%	28.69%
Jackson County Fairgrounds	81,997	124,849	103,238	153,030	6.55%	15.40%
Jackson Lake State Park	82,000	49,800	75,600	108,240	8.96%	10.25%
Jungle Jim's International Market	2,720,000	2,750,000	2,410,000	2,929,432	18.39%	19.22%

SUMMARY FOOT TRAFFIC DATA

ATTRACTION	ANNUAL VISITORS				FROM 50+ MILES	ONLY ONE VISIT
	2018	2019	2020	2021		
Keim Family Market	60,900	78,400	99,900	101,805	33.54%	54.46%
Lake Alma State Park	87,800	101,200	144,200	154,342	9.14%	11.32%
Lake Hope State Park	142,800	150,500	120,000	159,593	56.81%	21.74%
Lake Katherine State Natural Area	4,800	11,800	27,500	14,583	12.88%	53.68%
Lake Vesuvius State Recreation Area	67,000	67,000	55,300	62,204	12.23%	31.75%
Lake White State Park	21,500	21,500	31,700	33,747	11.43%	28.91%
Lawrence County Fairgrounds	94,734	104,771	23,438	105,049	6.63%	25.44%
Leo Petroglyph	3,500	3,700	7,400	4,500	40.65%	7.55%
Little Miami Brewing Company	182,700	206,400	255,700	347,988	10.71%	33.39%
Mennonite Busienss Area	95,100	111,100	153,700	142,270	29.04%	34.54%
Miller's Bakery and Furniture	5,800	7,000	4,600	10,568	25.33%	22.54%
Moonville Tunnel	1,300	1,300	1,300	1,109	47.09%	3.14%
Old Home Place	53,700	69,000	87,500	90,002	11.96%	25.50%
Paint Creek State Park	192,800	205,400	274,500	243,478	14.14%	12.35%
Parker House Museum	6,100	5,500	6,800	10,728	19.51%	28.87%
Pike County Fairgrounds	116,539	156,911	109,965	185,186	8.32%	9.33%
Pike Lake State Park	9,600	18,100	20,900	8,600	33.45%	18.72%
Portsmouth Brewing Company	197,600	201,700	139,600	105,200	12.84%	25.71%
Pump House Center for the Arts	23,700	21,700	28,000	17,800	3.21%	37.51%
Raccoon Creek Outfitters	5,000	5,000	5,800	7,300	38.72%	1.63%
Rankin House Museum	10,900	10,500	5,900	9,761	73.20%	47.53%
Ravenwood Castle	19,400	14,700	13,000	24,203	83.34%	8.58%
Red Barn Convention Center	17,800	12,400	0	8,178	22.86%	4.63%
Rocky Fork State Park	293,100	315,600	365,800	351,936	18.14%	11.87%
Ross County Fairgrounds	519,879	459,449	120,676	500,421	23.02%	9.24%
Scioto County Fairgrounds	243,587	248,213	57,505	247,372	18.42%	26.19%
Scioto Trail State Park	41,600	42,600	50,500	44,482	20.77%	22.63%
Selby 100 Mile House and Gardens	5,300	5,300	5,300	5,300	9.12%	3.00%
Serpent Mound State Memorial	23,100	28,300	22,500	35,628	80.52%	71.09%
Shawnee State Park	138,000	135,600	132,500	177,647	37.06%	12.46%
Sons of Toil Brewery	50,400	48,600	57,800	76,786	7.67%	20.14%
Southern Ohio Museum	15,900	19,900	11,900	21,072	15.32%	33.42%
Stonelick State Park	99,400	113,500	195,900	206,415	5.01%	12.27%
Tecumseh! Outdoor Drama	74,800	86,900	0	64,669	46.48%	6.39%
Tri-State Warbird Museum	8,500	8,500	0	13,733	8.33%	6.21%
True Taste of Country	6,000	6,000	6,000	10,029	4.49%	6.27%
Vinton County Fairgrounds	50,593	68,161	10,855	74,855	9.48%	12.29%
Water's Edge Canoe Livery	14,300	10,900	18,400	10,817	12.54%	44.22%

LODGING AND VISITOR SERVICES

Lodging alternatives found in the region include chain and independent hotels and motels, bed and breakfast or similar inns, short-term rentals, or public and private campgrounds. Hotels and motels are mostly congregated around the larger cities and along the Ohio River, and include a combination of older independent and chain hotels and motels, and newer chains.

Hotels and Motels

Most of the mid-tier chain hotels within the study area are located in the urbanized centers and along the Ohio River, including places like Portsmouth, Ironton, Gallipolis, and Chillicothe, as well as the urban part of Clermont County. Economy tier and independent hotels are found in the smaller cities, as well as the larger communities. The rural areas and small cities often include a mix of cottages/cabins, motels and traditional B&Bs.

- ▶ Adams: 32 lodging facilities are identified in county guide. A majority are independents, with a limited number of flagged hotels which include Comfort Inn. Inventory consists mainly of B&Bs, cabins, and motels.
- ▶ Brown: Nine lodging facilities consisting primarily of smaller motels, inns, and B&Bs.
- ▶ Clermont: By 2022 there will be fifteen hotels range from economy to upscale. Tru by Hilton and Home2Suites and Staybridge Suites are both in development. Holiday Inn and Suites is only full service hotel in the county.
- ▶ Fayette: Ten hotels range from economy to upper mid-scale.
- ▶ Gallia: Lodging is concentrated in the Gallipolis area, and includes one traditional B&B, four economy hotel/motels, two midscale hotels, and one upper midscale hotel.
- ▶ Highland: Twelve cabin and house rentals, two economy hotels, and one mid-scale hotel are found in the county.
- ▶ Jackson: Lodging options include two economy and two mid-scale hotels, a hunting lodge, and bed & breakfast inn.
- ▶ Lawrence: Three upper mid-scale hotels, including a new Townplace Suites by Marriott, are in Ironton, along with older economy tier and independent hotels.
- ▶ Ross: There are fourteen hotels in Chillicothe, including several upper mid-scale brands such as Holiday Inn Express, Best Western, Hampton Inn, Holiday Inn, and Fairfield Inn & Suites by Marriot.
- ▶ Pike: Two upper midscale hotels and two economy motels are located in the county. Long's Retreat Family Resort, while primarily a camping destination, has some cabins.
- ▶ Scioto: Six national flags including three mid-scale and three upper mid-scale hotels are concentrated in the Portsmouth area. The Shawnee Lodge and Conference Center includes a lodge and scattered cabins.
- ▶ Vinton: The county's only hotel is the Ravenswood Castle, a boutique hotel offering on-site eating and drinking and a variety of themed suites, cottages, and cabins. There are over two dozen cabins and cottages

About 70 percent of the US market is captured by branded hotels, but private home and room rentals are emerging as a significant alternative to conventional hotels, as more people offer properties for nightly and longer stays, and more visitors are willing to schedule stays in these properties. The hotel industry was negatively impacted by COVID throughout much of 2020 and 2021 with a decrease in demand in the leisure, group, and business travel segments. However, according to [hospitality.net](https://www.hospitality.net):

“Average earnings for U.S. short-term rentals grew to their highest ever in 2021, a full 35% higher than at the start of pandemic and even outpaced home prices, which have risen 24.8% over the same period. On average, a listing earned around 26.2% more revenue in 2021 compared to 2020.”

Consequently, there may be opportunities for the hotel sector to grow by meeting the demand for lodging types that many short-term rental platforms are currently providing. There may be places where smaller formats that combine the conveniences of short-term rental sites (contactless entry, instant booking) with unique local experiences or amenities

(proximity to parks, trails, water, historic downtowns) can be a viable hotel development strategy. Locally-owned as well as franchisee owners of existing hotels may also find more and more opportunities to diversify their rooms as short-term rentals, simply by using platforms like AirBNB or VRBO for bookings.

Short-Term Rentals

There are hundreds of short-term rental properties within the study area. Recent search activity using a query for locations and time period “any week” found the following listings and daily rates ranges by county. Daily rates do not include taxes, fees, cleaning fees, etc. While there were larger concentrations of short-term rental units located nearer larger cities, a few of the more rural counties also had a large number of listings (Highland County, for example). Surprisingly, there are few short-term rentals listed on Airbnb in Gallia and Jackson Counties. These properties may provide an opportunity to scale up tourism infrastructure in the short-term. This strategy can be applied in more remote areas with proximity to natural assets such as state parks, state and national forests, and private protected areas. It can also be applied in historic downtowns such as Chillicothe, where roughly 20 short-term rentals currently exist. Counties can help promote these opportunities by providing information on licensing and permitting requirements. However, promoting short term rentals can be politically challenging, especially if lodging taxes are not collected and remitted to the convention and visitors bureau.

SHORT-TERM RENTAL UNITS AND RATES

COUNTY	# OF AIRBNB LISTINGS	DAILY RATES
Adams	20	\$47-\$200
Brown	17	\$49 to \$336
Clermont	134	\$37 to \$488
Fayette	3	\$101 to \$139
Gallia	16	\$81 to \$210
Highland	32	\$90 to \$456
Jackson	2	\$700 to \$1,700
Lawrence	2	\$100 to \$141
Ross	30	\$50 to \$630
Pike	14	\$70 to \$120
Scioto	20	\$45 to \$199
Vinton	25	\$76 to \$636

Private and Public Campgrounds

There are many private campgrounds located throughout the study area. The number of private and public campgrounds is summarized by county in the table below. While most facilities provide a mix of tent only and RV sites, sites such as Shawnee State Forest provide additional options including lodges and cabins.

In addition to the more traditional venues, the county fairgrounds have campgrounds that can be used by travelers. They often have the most sites, but limited services for recreational vehicles, and may not be suitable for tent campers. Their marketing is limited, primarily appealing to local residents and user groups already familiar with the facilities. With more technology and better marketing these campgrounds will likely see increased utilization.

State park and forest, national forest, and other public campgrounds are also limited in the services they offer. Some are not adequately sized or developed for RV campers, and cellular service is not available at some campgrounds. Private transient campgrounds do not compare well to national standards, for the RV travelers that make up the bulk of the market. Issues of

concern include the quality of individual camping sites, infrastructure (electric, water and sewer hookups), and amenities. Almost none of the private campgrounds offers effective wi-fi internet. Most do not have a means to book stays online

Similar to the traditional lodging industry, the campground sector is being impacted by technology in a way that creates more opportunities for private landowners to essentially run their own small campgrounds. Sites such as Harvest Hosts and Hipcamp (The “Airbnb of campgrounds”) are connecting landowners with camping enthusiasts outside of the more traditional campground venues. This trend is seen throughout the region, but most noticeably in Vinton County with sixteen listings.

Regardless of ownership or reservation system, campgrounds will need to adopt and invest in new technologies to meet the demands of users that prefer on-line check-in and amenities such as strong WI-FI signal. Campground operators may also consider diversifying their offerings to include “glamping” options such as tree houses, tee-pees, yurts, and other unique camping-like experiences. Nationally, these camping activities are growing in demand, and provide a cost-effective way for operators to diversify their portfolio of sites. According to the Ohio Resident Outdoor Recreation Survey (2017), 11.2 percent of respondents are interested in camping in a yurt, pre-set up tent or similar structure. Very few of these options currently exist within the region outside a few State Parks and Forests.

EXISTING CAMPING AREAS BY COUNTY

COUNTY	PRIVATE CAMPGROUNDS	PUBLIC CAMPGROUNDS	HIPCAMP
Adams	3	0	0
Brown	2	0	1
Clermont	5	3	0
Fayette	3	1	0
Gallia	1	2	0
Highland	3	2	1
Jackson	4	1	2
Lawrence	0	2	0
Ross	2	2	2
Pike	5	1	3
Ross	2	2	2
Scioto	6	1	2
Vinton	5	1	16

Visitor Serving Businesses

Along with lodging, visitors are in need of dining and shopping both for basic needs and entertainment. While most visitors express an interest in unique, local options, these businesses may not exist, may not be open during peak hours, or may not be well-located and marketed to attract visitors. Similar to hotels, most of the eating and dining establishments within the study area are located in the urbanized centers and along the Ohio River. A similar pattern holds for retail, with the exception of several destination retail destinations including Amish or Mennonite shops and Destination Outlets.

Eating and drinking venues include many fast-food restaurants and ethnic restaurants (primarily Mexican, Asian, and Italian). Outside of the Clermont County area, Chillicothe, and Portsmouth there are fewer options available for those seeking fine dining or other sit-down options. The Selby 100 Mile House and Gardens would be an example. Restauranteurs in the area face supply chain and labor scarcity challenges, leaving many operators to cut back hours and level of service to customers.

Finding and encouraging unique local eateries and drinking establishments with local food traditions and recipes can provide opportunities to strengthen the local restaurant mix while also attracting visitors. The region's dairy bars, bakeries, barbecue restaurants, brewpubs, and wineries can be strengthened and expanded to support the growth of tourism while also serving local customers.

Shopping

Amish and Mennonite furniture stores, bakeries and delis, and farm markets are popular components of a trip to the area. Antique stores, bakeries, and other specialty shops can also contribute to a visit, and have the potential to become a reason for a visit to communities that can support a larger concentration. The outlet malls in Fayette County also play a unique role in tourism, both capturing passing traffic on the interstate and drawing visitors from the nearby metropolitan areas. Aside from these business types, travelers often need access to shopping for groceries and other basic items, which can be found in many communities close to the primary visitor attractions.

The region's many historic downtowns often provide attractive locations for retailing. Finding ways to help incentivize adaptive reuse can stimulate new development. Specialty operators appealing to leisure travelers face increased pressure from direct-to-consumer platforms (Etsy, for example), but may also use these platforms to conduct their own online sales business. Larger stores, such as those found at Destination Outlets, also struggle to compete with similar, newer offerings north of Columbus, as well as with on-line competitors like Amazon.

Visitor Centers

Most of the county-operated visitor centers are located in the county seat, or in the largest city within the county. Several are co-located with a chamber of commerce and typical hours of operation are normal weekday working hours. Outside of the larger counties such as Clermont and Ross, staffing is limited. There are numerous rest areas of other sites along major roadways, maintained by the state or individual county highway departments, that could be utilized to promote regional tourism through displays and literature distribution.

Access to on-site visitor information is uneven across the different counties, and some opportunities to promote tourism are missed. Several counties and even a few communities have visitor information centers or chambers of commerce where visitor information is available. These may have limited hours or minimal displays highlighting only sites and businesses in the county or community. The same can be said of state and federal park and forest sites, where it can be difficult to get any information about the park or forest, trail maps, campground information, etc., even during usual business hours. Brown County has the only visitor center available after hours.