



PLACE|BALANCE

Driving Action for Destination & Community Alignment

CLARITY
OF PLACE 
A LONGWOODS COMPANY



PLACE|BALANCE

What: Resident vs. Visitor

First of-its-kind, proprietary **diagnostic** tool that provides an **evidence-based** understanding of community alignment and insights for managing destinations.



Why: Meeting DMO needs

- Areas of strain or opportunity that impact the destination's competitiveness
- How well the visitor economy is aligned with your community priorities
- How the physical product of a destination can be leveraged to encourage visitation
- Other (non-tourism) market forces that are impacting the destination's product

BALANCE = LONG-TERM COMPETITIVENESS

To continue to generate positive impacts through tourism—and mitigate negative ones, destination leaders must ensure their approach to optimizing the visitor economy is aligned with community priorities

Questions to test **Community Alignment**



What are opportunities for leveraging destination assets to meet hospitality business needs?



Where and/or when is the visitor economy stressing the community's capacity?



How is the visitor economy impacting other parts of the community?



How do other activities in the community impact the destination's competitiveness?

PLACE|BALANCE Uses

DESTINATION
PLANNING &
MANAGEMENT



RECOVERY &
RESILIENCY



STRATEGIES FOR
LONG-TERM
COMPETITIVENESS
& SUSTAINABILITY



EDUCATION &
ADVOCACY

PLANNING CASE STUDY

Destination P*

Tourism is an important driver for Destination P. However, to grow demand in “need periods,” the community wants to harness the continued growth of youth sports travel. PlaceBalance was used to help Explore Destination P build a case for municipal support for a proposal to build a multi-use sports venue.

How PlaceBalance helped Destination P

1. **ANALYZE:** Current state beyond the tourism vertical
2. **BENCHMARK:** Competitor product and plans
3. **DRIVE INSIGHTS:** Answer foundational questions
4. **IDENTIFY ACTION:** Evidence-based recommendations

*A true case study – whose name has been changed



Analyze

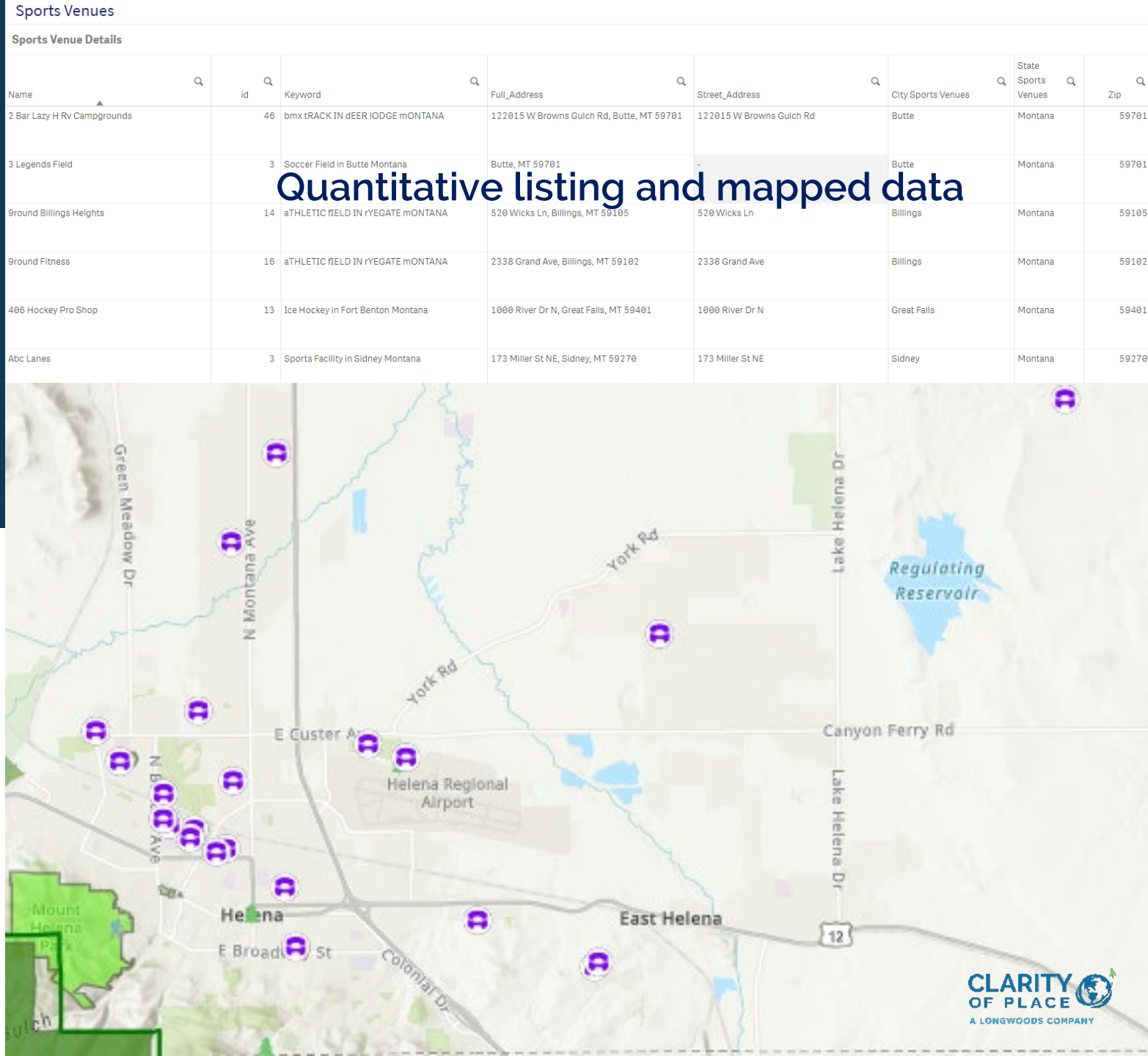
PlaceBalance supplements client data to build an understanding of Destination P's current state and identify areas of opportunity.



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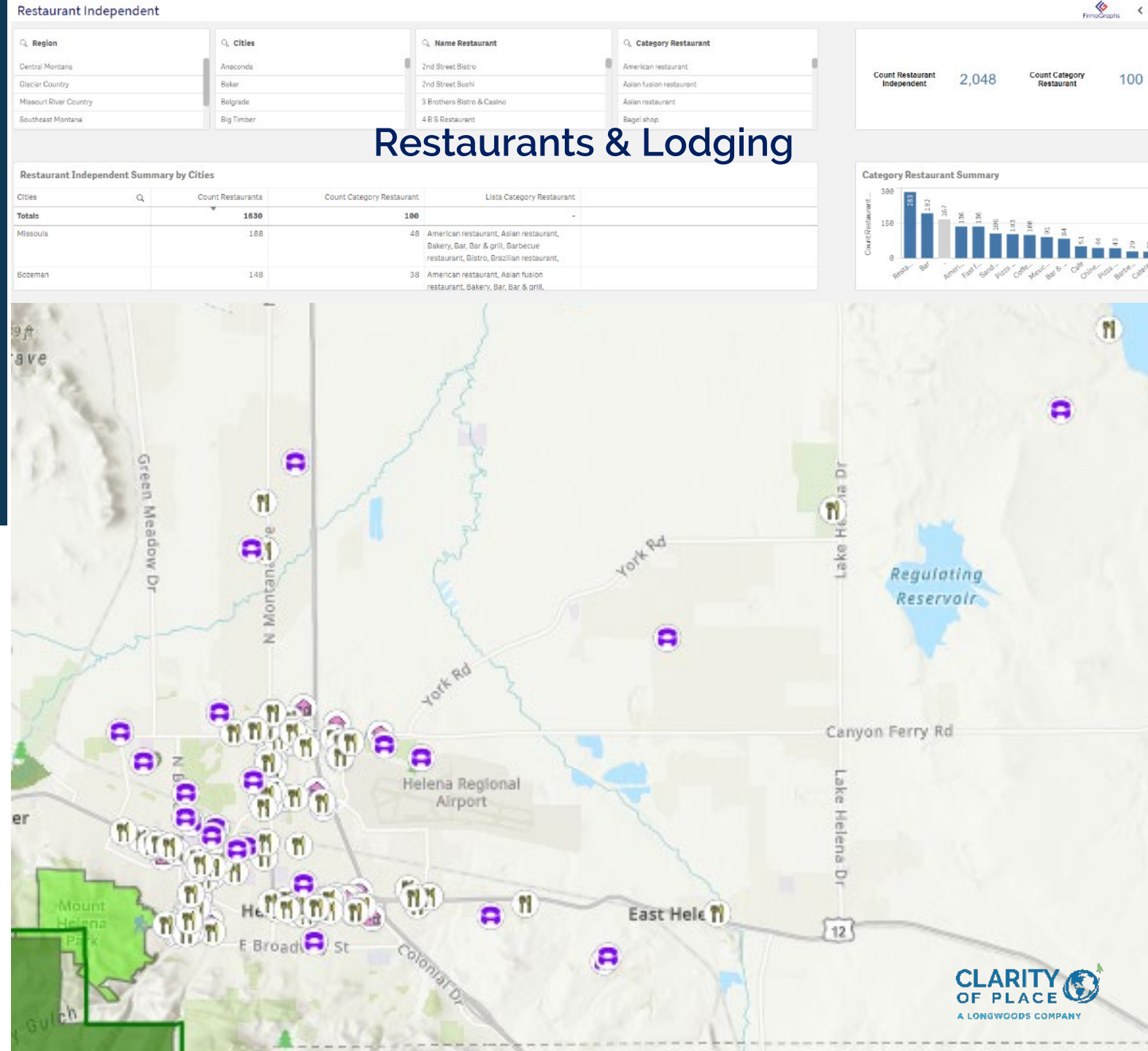
- Existing sports infrastructure



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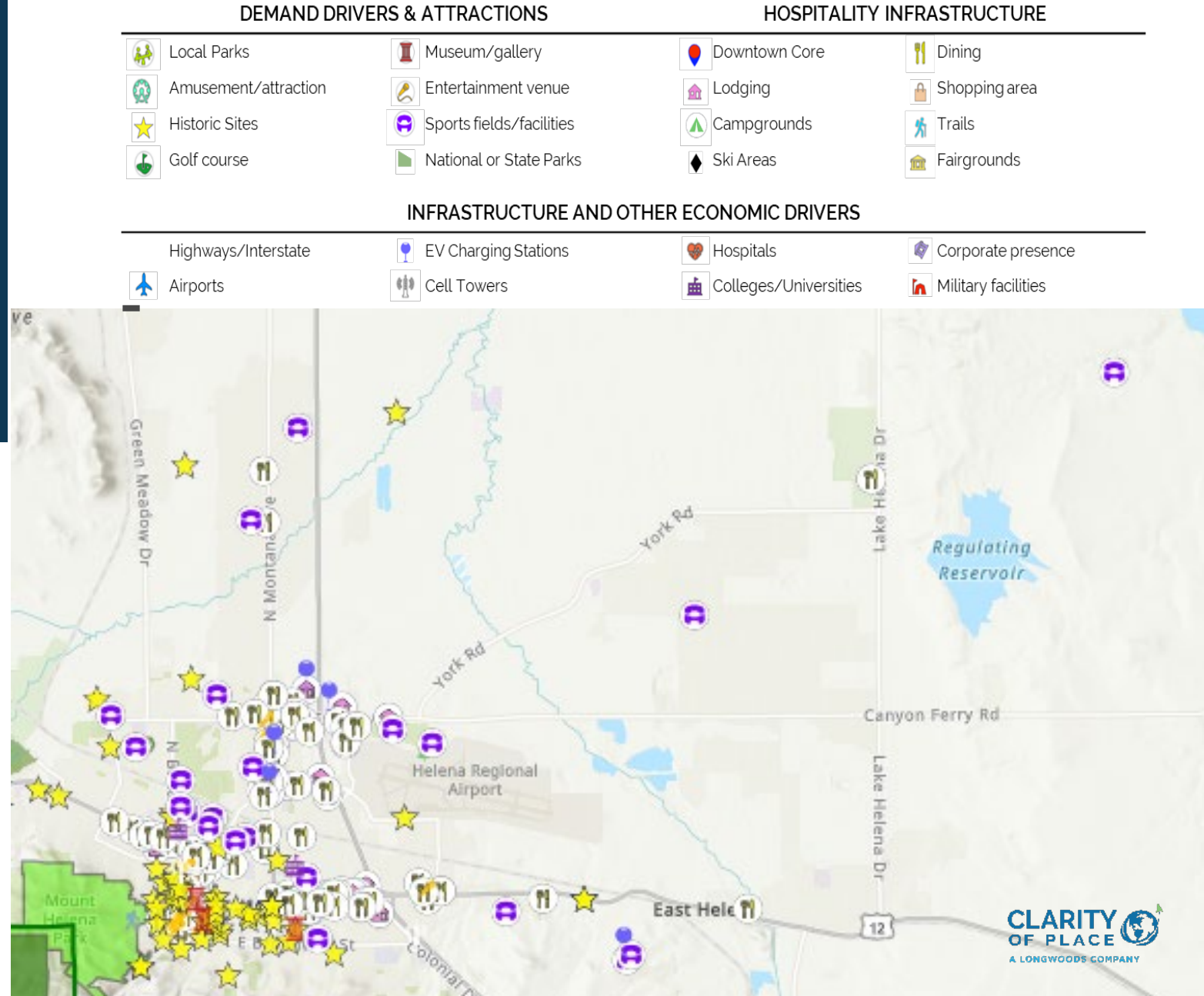
- Existing sports infrastructure
- Amenities for sports families



Analyze

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- Existing sports infrastructure
- Amenities for sports families
- Rounding out the visitor experience



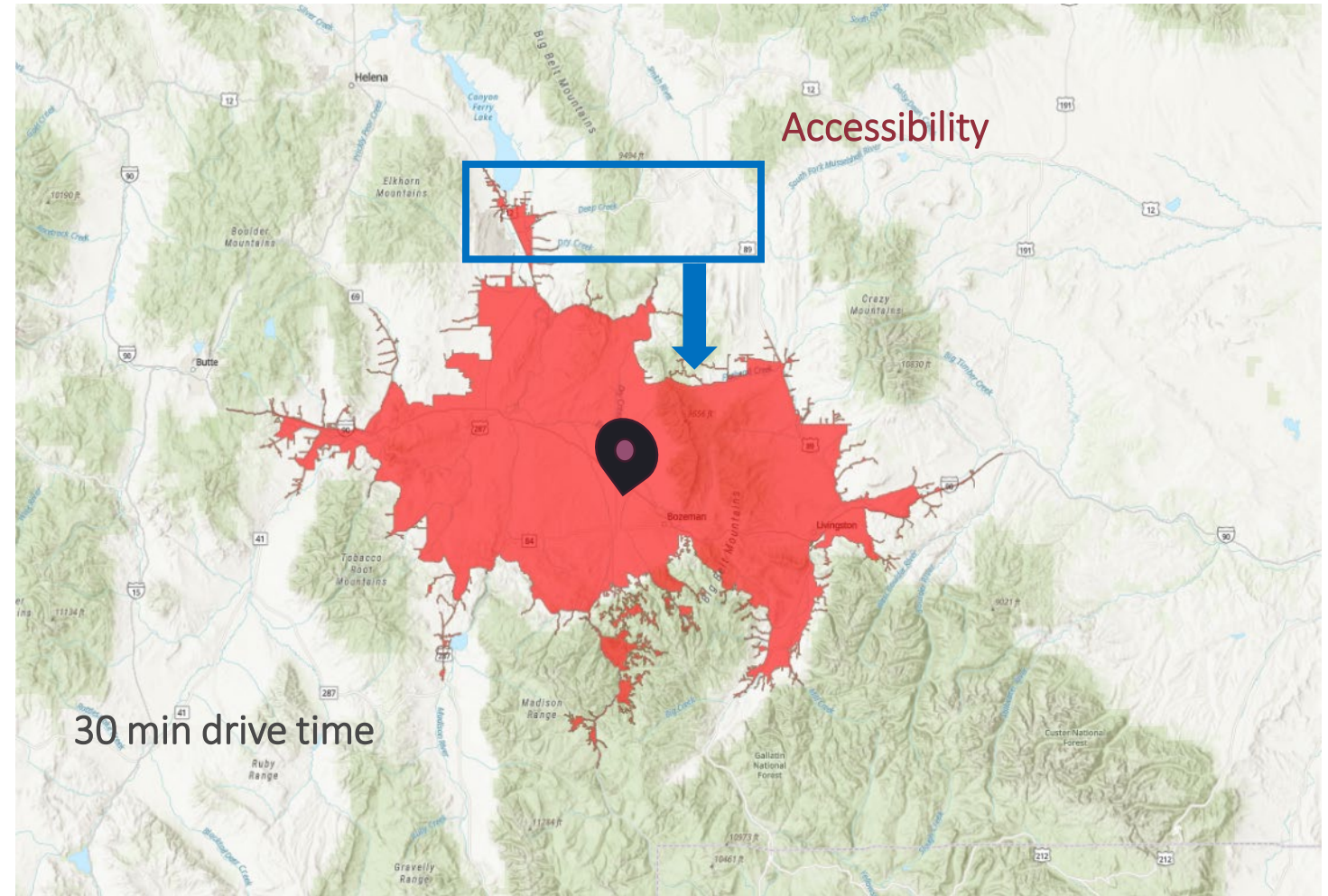
Analyze

Our extensive infrastructure data and ability to mine meeting minutes and other municipal legislation or funding postings also allow us to understand other community aspects that affect tourism.



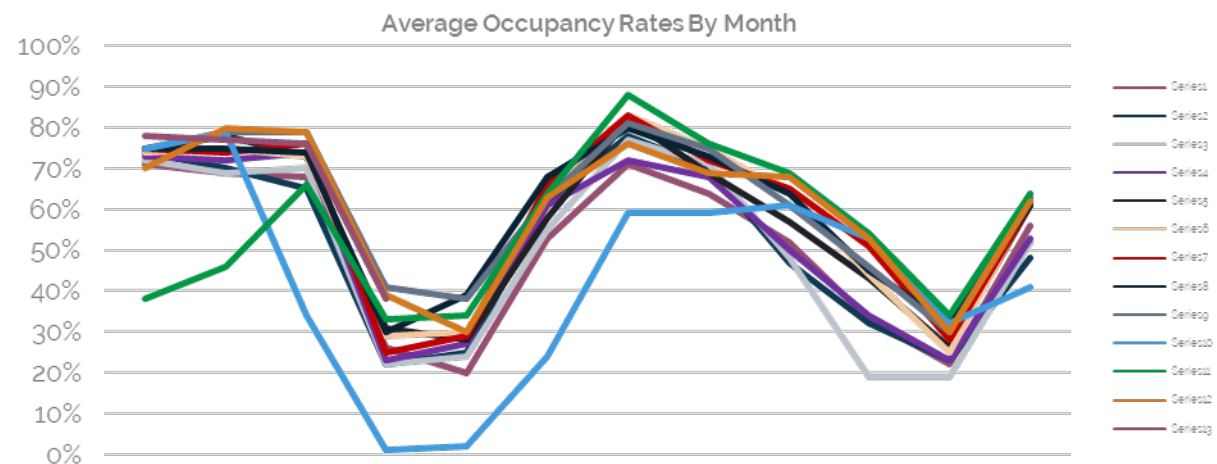
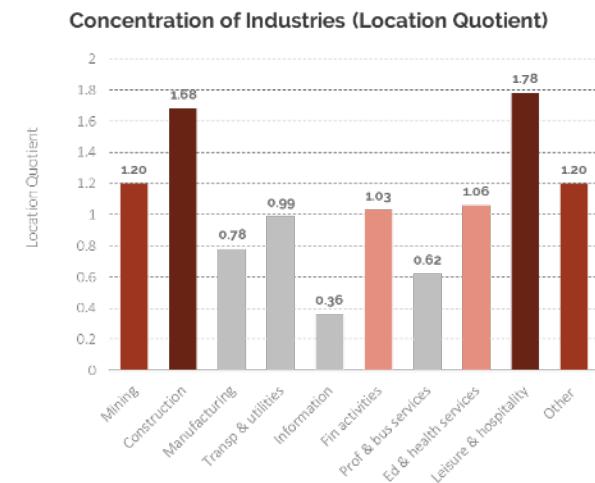
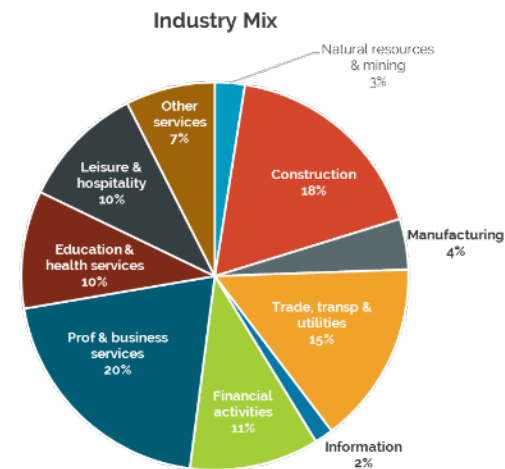
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The screenshot displays the Qlik Sense 'Analyze' tab. The top navigation bar includes 'Notes', 'Insight Advisor', and a search bar. A blue box highlights the 'Parks & Rec' filter in the search bar. Below the search bar, the 'Capital Projects' section is visible, featuring a table with columns for 'Region Service', 'Name Parent', and 'Business Area FG'. The 'Region Service' column lists Louisiana, Maryland, New Mexico, and Virginia. The 'Name Parent' column lists Carroll County, Maryland; City of New Orleans, Louisiana; Richmond International Airport; State of New Mexico; GRTC Transit System, Virginia; and Henrico County, Virginia. The 'Business Area FG' column lists Parks & Rec, Bonds, Loans, Reserves, Insurance, Bridges and Tunnels, Commercial Facilities, Dams, Levees, Stormwater, and Drinking Water Conveyance. A blue arrow points from the 'Parks & Rec' filter in the search bar to the 'Parks & Rec' filter in the 'Business Area FG' column.

Region Projects Summary

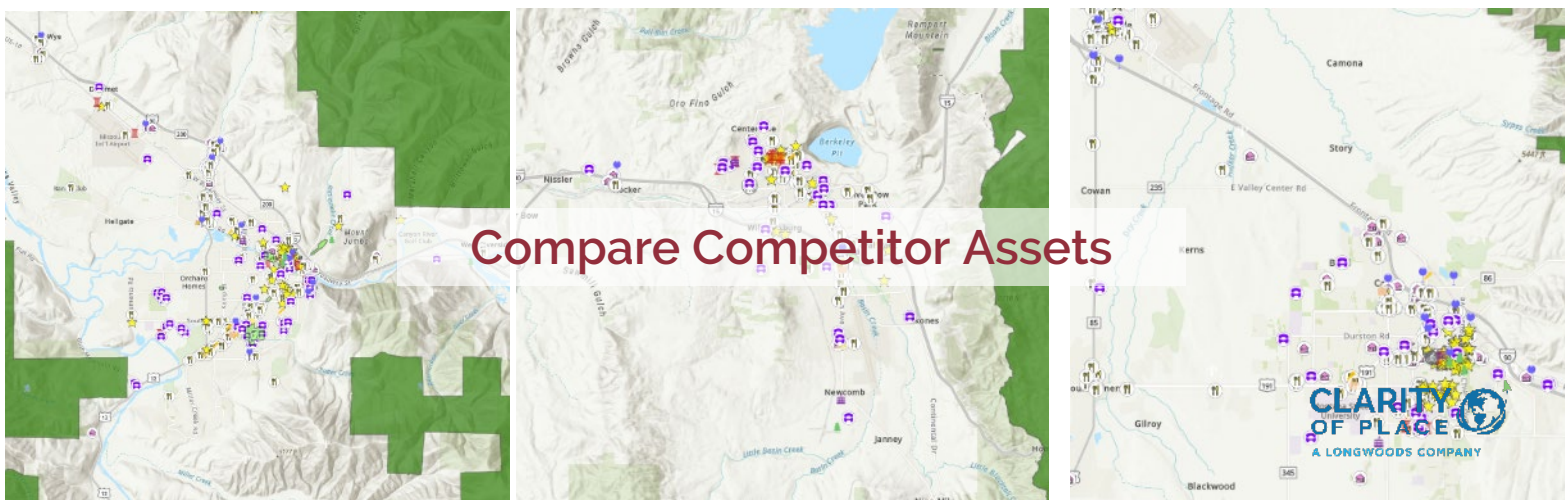
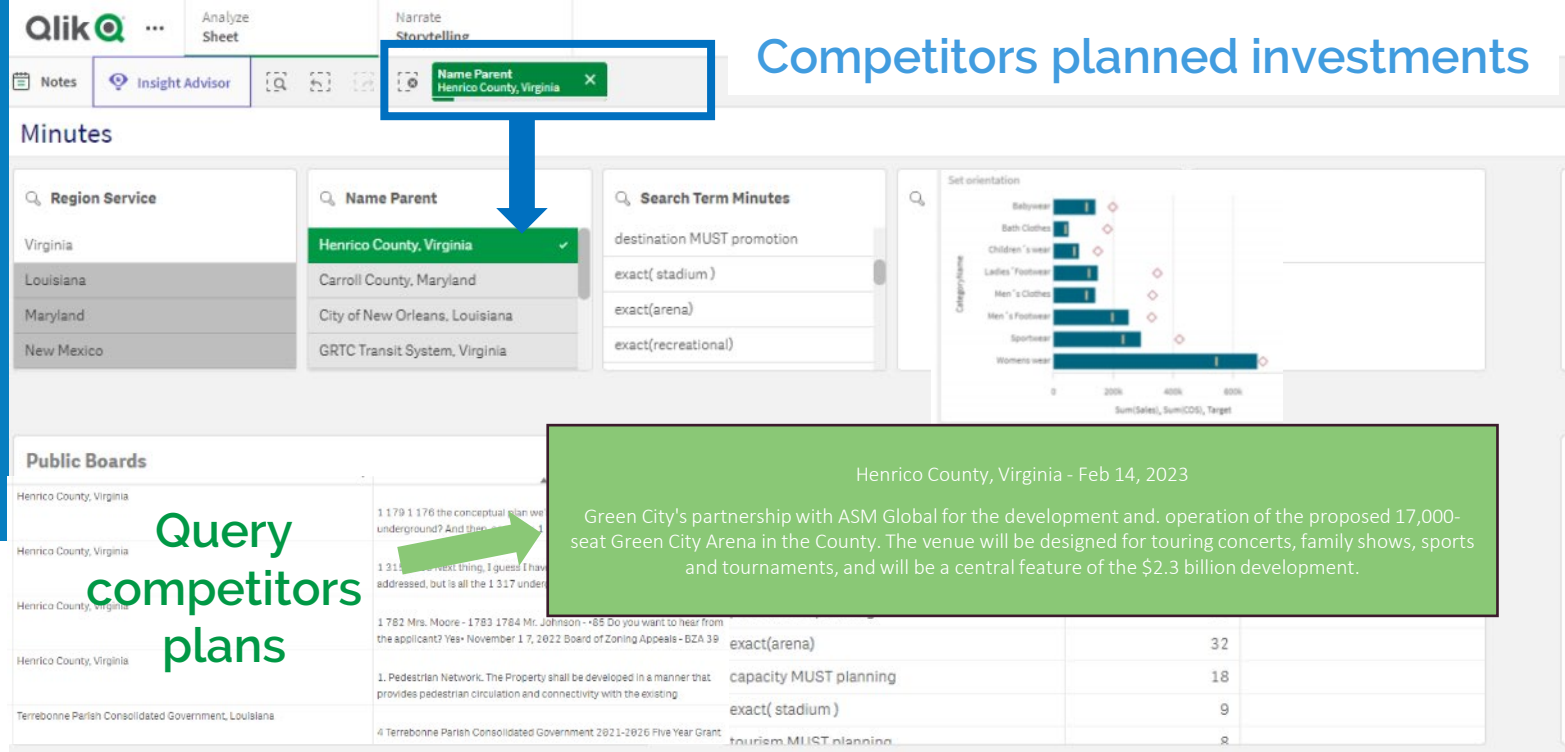
Region Service	Count Capital Projects	Total Project Value, \$
Totals	70	\$851,204,396
Virginia	58	\$580,988,396
Louisiana	10	\$250,000,000
Maryland	1	\$216,000

Capital Projects

Name Parent	Name Project
Totals	
Terrebonne Parish Consolidated Government, Louisiana	CDBG Falgout Canal with Pontoon
Terrebonne Parish Consolidated Government, Louisiana	Nelo Street Bridge Paving Project
Terrebonne Parish Consolidated Government, Louisiana	BCSP - Asphalt Road - Valhi Conne
Terrebonne Parish Consolidated Government, Louisiana	CDBG Cedar Grove to Ashland Lan
Terrebonne Parish Consolidated Government, Louisiana	Landfill Closure - Final Cap
Terrebonne Parish Consolidated Government, Louisiana	CDBG Ward 7 Levee Elevation
Terrebonne Parish Consolidated Government, Louisiana	CDBG Public Works Administrative

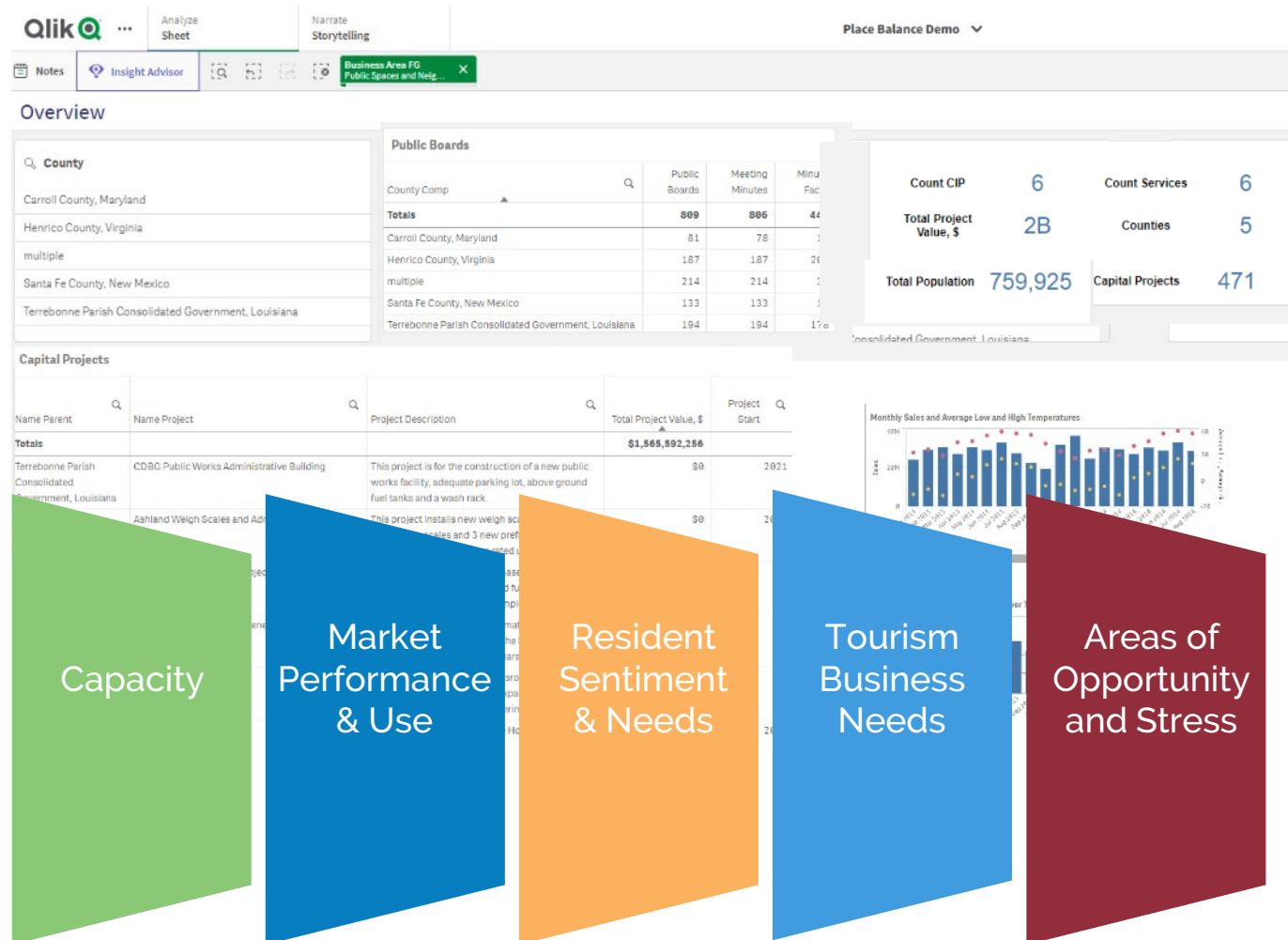
Benchmark

Once PlaceBalance built an understanding of Destination P's current state, we filtered the data to see how Destination P is positioned against its competitors for gaining a larger market share for youth sports travel.



Draw Insights

Clarity of Place uses its practitioner expertise to draw insights from the assessments. These insights showed Destination P potential locations for the venue and provided context on potential uses that would distinguish the venue and leverage existing assets.



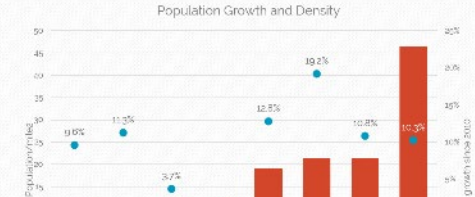
Driving Evidence-based Decisions

PlaceBalance's Insights Report:

- Provides a foundation and knowledge-base for clients to understand where the visitor economy "fits" in their community
- Develops "proof-points" to validate a recommended action
- Sets a baseline to measure progress and ask more questions

POPULATION GROWTH & DENSITY

- The region's population is concentrated in Missoula and Flathead counties.
- Missoula county has the highest population density by far in the county. Flathead, Lake, and Ravalli county are the next most densely populated counties.
- Since 2010, Flathead county has experienced the highest level of population growth (19.2%). Lake, Mineral, Missoula, Ravalli, and Sanders county experienced near and above double-digit growth in the same period. Lincoln county lost a significant amount of population.
- For the average 6.2 people per square mile, the population density is 10.3% higher than the national average.



OVERVIEW OF COMP SET

The following pages describe the region's destination product and population and economic trends that impact visitation and economic activity in the region.

	Tourism in economy* (Location Quotient 2021)	Population & Density - 2022* (persons/sq mile)	Population Growth (since 2010)	Visitor to resident ratio*	Resident Settlement (economy too dependent on tourism)	Destination Product Density**	Accessibility**
Flathead	1.76	106,306 214.3	19.2%	0.37	0.44	Maturing	Airport Highways 2 & 93
Glacier	0.96	13,682 14.6	3.7%	0.73	7.2	Emerging	Highways 2 & 93, Ambles
Lake	1.1	31,051 214.4	10.8%	0.47	4.32	Developing	Highway 93
Lincoln	1.42	18,574 15.4	0.1%	0.42	6.83	Emerging/ Developing	Highways 2 & 32
Mineral	1.1	4,508	0.8%	0.42	6.83	Emerging/ Developing	Highways 2 & 32
Missoula	1.1	106,306	10.3%	0.42	6.83	Emerging/ Developing	Highways 2 & 32
Ravalli	1.1	106,306	10.3%	0.42	6.83	Emerging/ Developing	Highways 2 & 32
Sanders	1.1	106,306	10.3%	0.42	6.83	Emerging/ Developing	Highways 2 & 32

Destination P: PRODUCT DENSITY

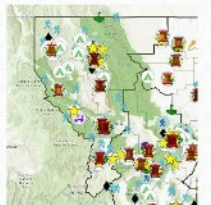
A destination's product is the sum of place-based assets that compel travelers to visit the area and spend money. Each destination has a unique product portfolio; product within a region varies.

Destinations that are "emerging" in their development concentrate on different strategies and employ different tactics to further grow their destination. Conversely, destinations that are more "mature" concentrate on managing the destination product in the context of other community infrastructure and needs. "Mature" destinations also focus on attracting higher-spend or niche travelers to balance volume with visitor impact.

The Regional Assessment & Inventory places Glacier Country Montana in the Maturing category, driven in large part by product in Missoula and along Highway 93 in Flathead county.

The destination product in each county was assessed to provide more a more granular view of where the areas of concentration are.

- Compared to the other travel regions in the state, Glacier Country is the most "mature" in terms of destination product.
- Product is concentrated in Missoula (Montana's second largest city) and in Kalispell and Whitefish that service the western entrance to Glacier National Park.
- The region's mountainous terrain limits access to the western counties.



PLACE|BALANCE



Understand Community Alignment

- Leverage destination assets to contribute to community vitality
- Balance impacts so visitor activity is net-positive



Organize Data

- Proprietary platform to draw targeted insights
- Update to measure progress



Draw Additional Insights

- Delve deeper to drive action
- Identify additional opportunities

Interested in Diving Deeper?

- [Aspen Case Study](#)
- [A PlaceBalance Primer](#)
- Continue our conversation



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THANK YOU

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