



The Tourism Reset Worksheet

Reimagining Discovery, Experience & Loyalty in a
Hybrid World

How to Use This Worksheet

This is not theory, this is a working session.

Complete one section at a time. Be honest. Be specific. The goal is clarity → action → measurable improvement.

Section 1: Discovery Audit

Where Are Guests Finding You? If the buyer journey starts digitally, how visible are you?

Traffic Sources Snapshot

Where do most of your visitors discover you?

- Instagram
- TikTok
- Google Search
- Google Maps
- Travel Board
- Hotel Referral
- Word of Mouth
- Other: _____

Social Visibility Check

- Do you consistently geo-tag your location? Yes No
- Are you using regional hashtags? Yes No
- Are recent guest posts tagging you? Yes No
- Does your grid reflect your current experience? Yes No

Score Yourself (1-5): _____

Discovery Friction Points

Where might you be invisible?

- Hard-to-find booking link
- Outdated website visuals
- Inconsistent brand messaging
- Low review count
- No regional partnerships
- No short-form video presence

Biggest Discovery Gap: _____

Section 2: Validation Audit

Are You Worth the Trip?

Before booking, guests check signals.

Review Strength

Average Rating: _____

Total Reviews: _____

Date of Most Recent Review: _____

Are you actively responding? Yes No

Regional Alignment

Are you:

- Featured by your local tourism board
- Included in regional itineraries
- Partnered with nearby hotels
- Cross-promoted with restaurants
- Hosting influencers

What partnership is underdeveloped?

“Destination-Worthy” Test

Would a first-time traveler say your winery is:

- Photo-worthy
- Story-rich
- Unique in positioning
- Bookable online
- Review-strong
- Easy to include in a 2-day itinerary

What makes you different?

Section 3: Digital Experience Layer

Does Booking Build Confidence?

Mobile-First Booking

Open your reservation page on your phone.

- Is it fast? Yes No
- Is it intuitive? Yes No
- Are pricing & policies clear? Yes No
- How many clicks to confirm? _____

Rate the UX (1-5): _____

Pre-Visit Communication

Do you send:

- Confirmation email
- Story-driven welcome message
- Directions & parking details
- Upgrade opportunities
- SMS reminder

What's missing? _____

Data Capture Strategy

During booking, are you collecting:

- Email
- Phone
- Visit intent
- Occasion
- Preference notes

What 1 data point would improve follow-up? _____

Section 4: The Loyalty Bridge

Turning Visitors Into Loyalists

Tourism revenue is short-term --> Loyalty revenue is long-term.

During the Visit

Does your team:

- Capture guest preferences
- Reference booking details
- Softly introduce membership
- Reinforce education & belonging

Conversion Rate (if known): _____

48-Hour Follow-Up

Do you send a personalized post-visit email?

- Yes
- No

Does it include:

- Wines tasted
- Personalized recommendations
- Club invitation
- Event invitation

Ongoing Touchpoints

Between shipments or visits, do guests receive:

- Educational content
- Event invitations
- Behind-the-scenes updates
- Regional collaborations
- Early access offers

Section 5: Your 30-Day Tourism Reset Plan

Choose ONE action from each category:

Discovery:

Validation:

Digital Experience:

Loyalty:

KPI Tracking Section

To measure your reset:

Monthly visitor count: _____

Visit-to-club conversion: _____

48-hour follow-up open rate: _____

Mobile booking %: _____

Referral source tracking accuracy (1-5): _____

Final Reflection

Tourism isn't just traffic, it's relationship design.

What is the ONE shift that would most improve your hybrid tourism system?