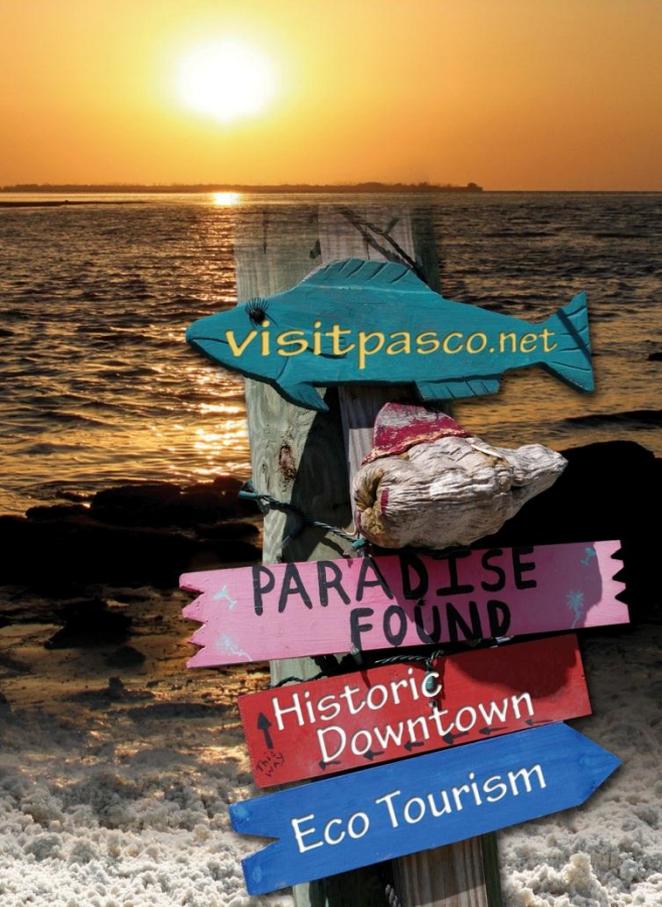


PASCO

County
Florida

it's only natural.

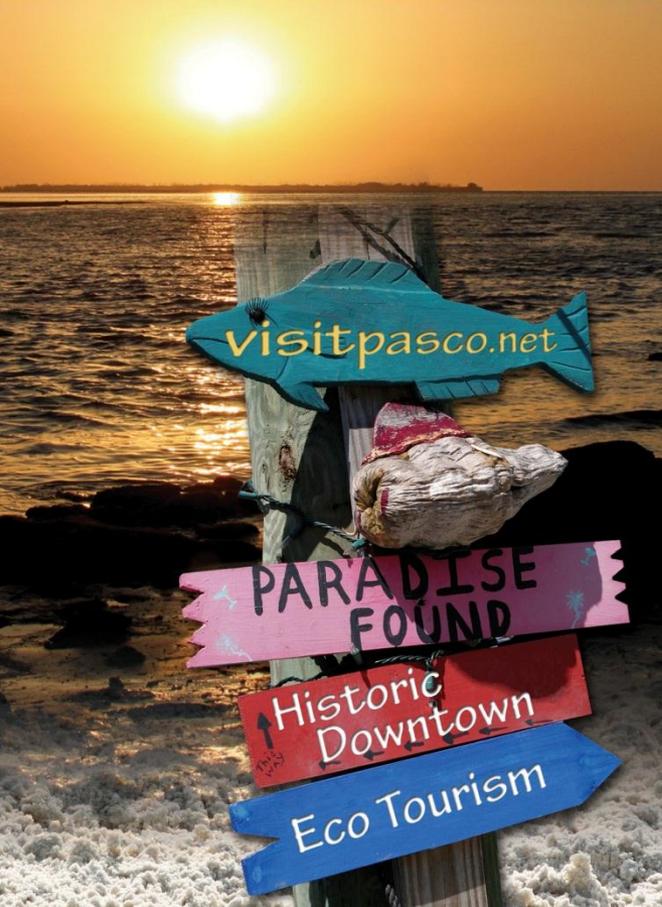


1

Pasco County

BCC and TDC Workshop February 26





Joint Workshop Agenda

1. Wiregrass Multi-Purpose Sports Park Update
2. Review of Current Tourism Plan
3. Tourism is Economic Development
4. Go Big, Compete and Go Global
5. Tourist Tax
6. Discussion

Review of Current Tourism Plan

Eric Keaton, Public Communications Manager

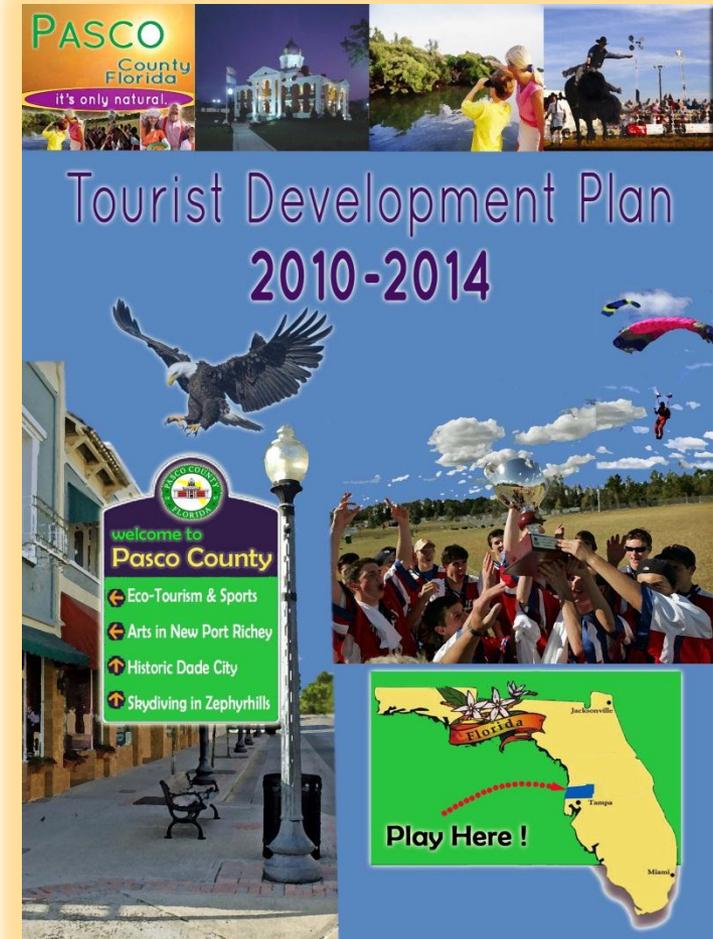
Adopted – April 14, 2010

VISION

To become the **premier sports and travel destination in Florida** by promoting sports tournaments, special events, outdoor recreation, ecotourism and cultural activities.

MISSION

Pasco County's focus is to create a tourist experience based on promoting our natural attractions, cultural programs and creating new sports business, thereby generating overnight visitors to boost tourist development and the economy.



Review of Current Tourism Plan

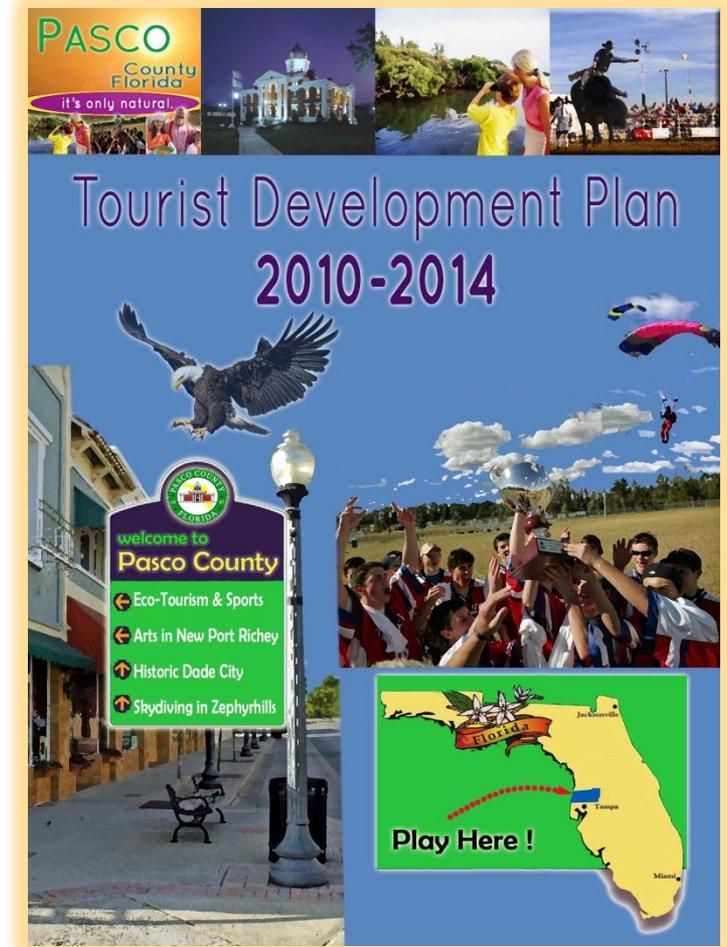
Eric Keaton, Public Communications Manager

GOALS

The following Goals, **in order of priority**, will implement the Plan's Vision and Mission.

1- Attract amateur and professional sports events and recreational activities in order to promote the county regionally, nationally and internationally as a sports travel destination. These efforts shall include but not be limited to the design, financing and construction of multi-sports facilities, creating sports event sponsorships and promoting additional venues, all of which would directly promote tourism in Pasco County.

- Attract sports events
- Design, finance and construct multi-sports facilities
- Promote additional venues



Review of Current Tourism Plan

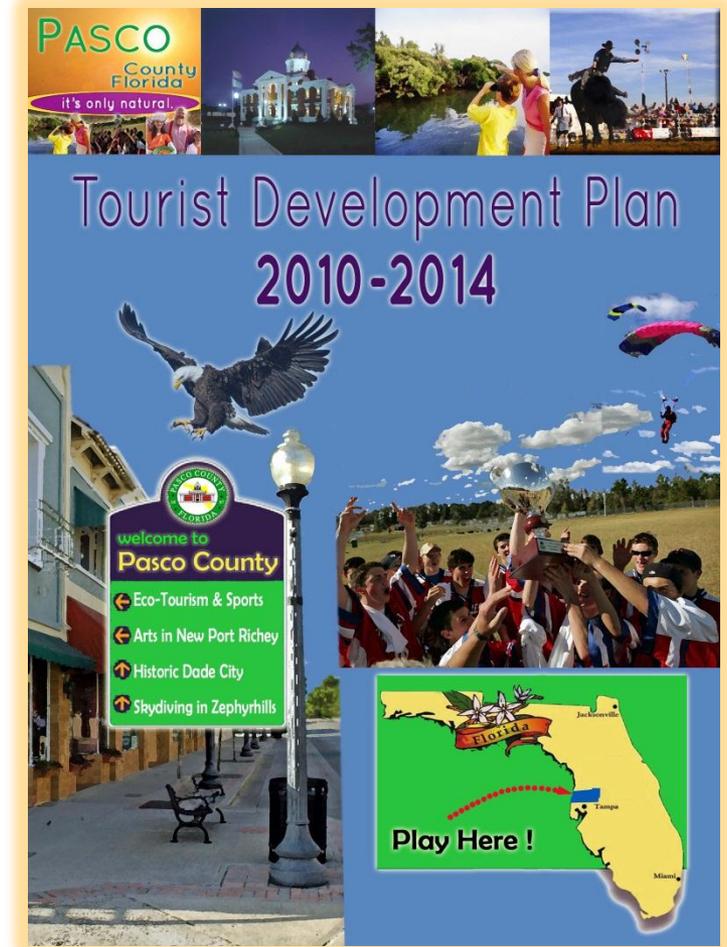
Eric Keaton, Public Communications Manager

GOALS

The following Goals, **in order of priority**, will implement the Plan's Vision and Mission.

2- Enhance the marketing efforts of the County utilizing social media, visitpasco.net, visitflorida.com, radio and television ad campaigns for out-of-state and in-state visitors and provide for event sponsorship and grants for cultural and arts entertainment, festivals, programs, and activities which directly promote and advance tourism to the County.

- Enhanced the marketing efforts
- Provided event sponsorship and grants



Review of Current Tourism Plan

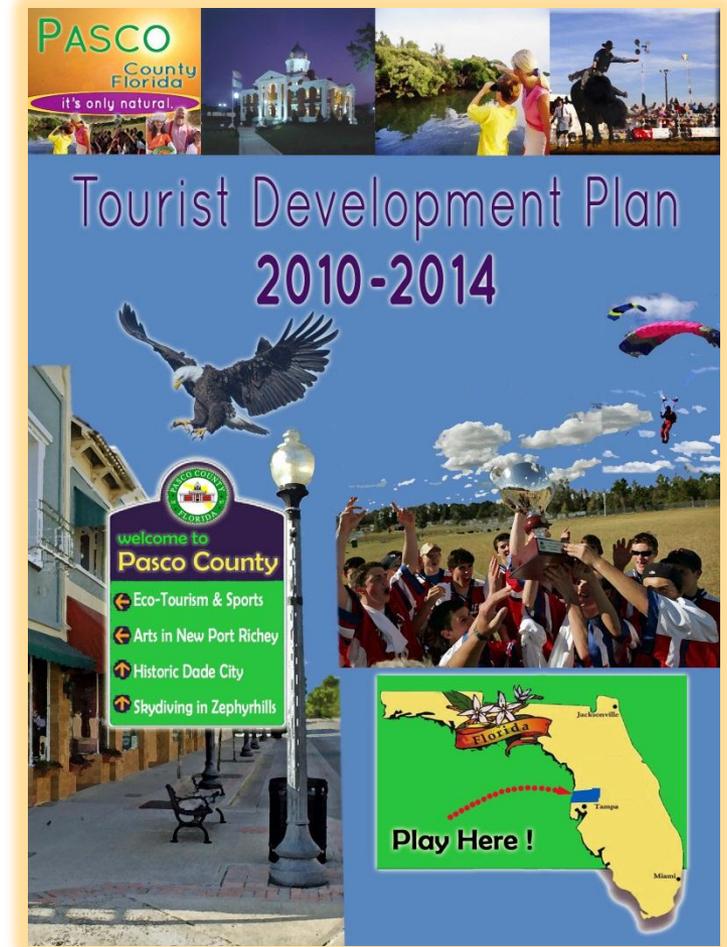
Eric Keaton, Public Communications Manager

GOALS

The following Goals, **in order of priority**, will implement the Plan's Vision and Mission.

3- Enhance tourism appeal and attractions by sustaining, improving and building the identity of Pasco County as a destination through signage leading visitors to attractions, thereby promoting ecotourism to Pasco County.

- Enhance tourism appeal
- Promoting ecotourism



Review of Current Tourism Plan

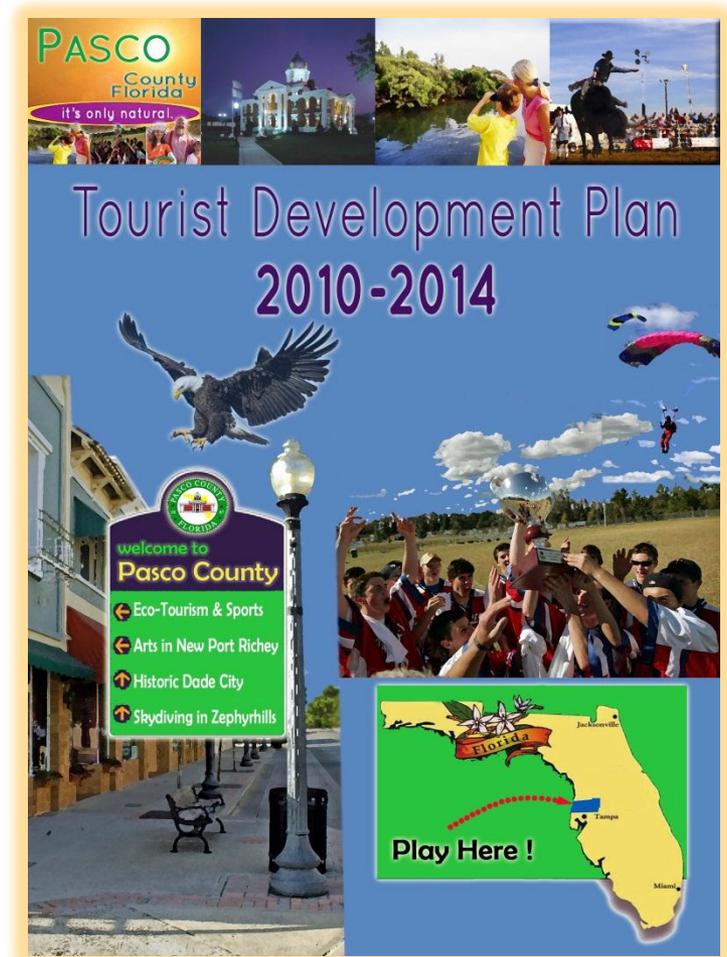
Eric Keaton, Public Communications Manager

GOALS

The following Goals, **in order of priority**, will implement the Plan's Vision and Mission.

4- Establish and maintain partnerships among our stakeholders to promote a positive economic impact as part of the Tourism Plan while engaging new partners among public, private, athletic groups, leagues and nonprofit organizations to plan, fund, and promote tourism, and measure results.

- Establish and maintain partnerships
- Engage new partners
- Measure results



Review of Current Tourism Plan

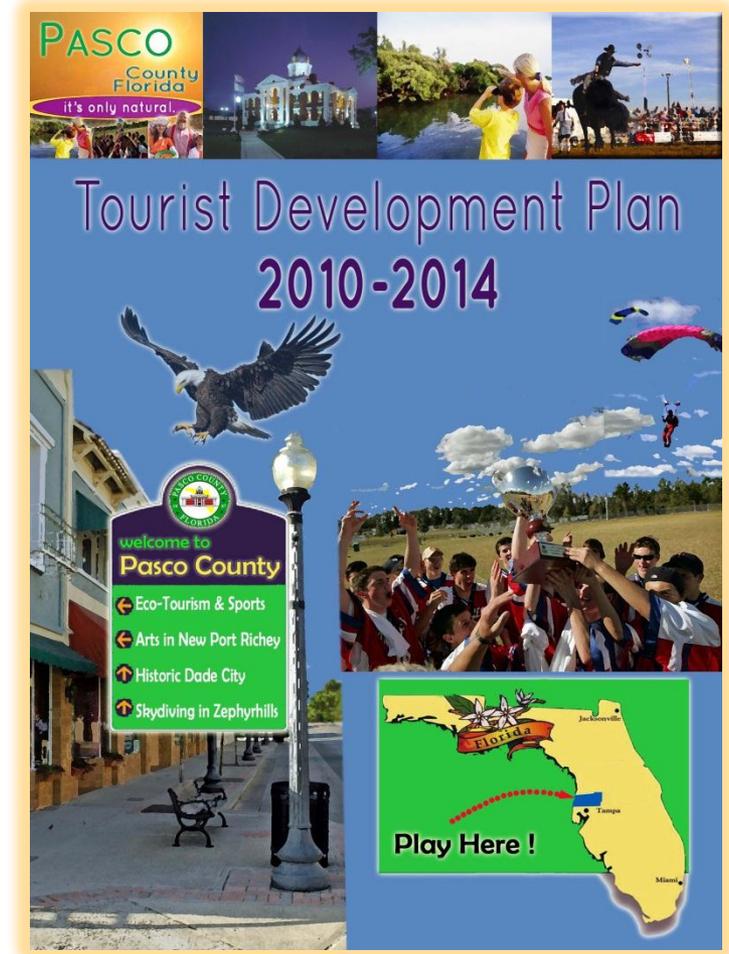
Eric Keaton, Public Communications Manager

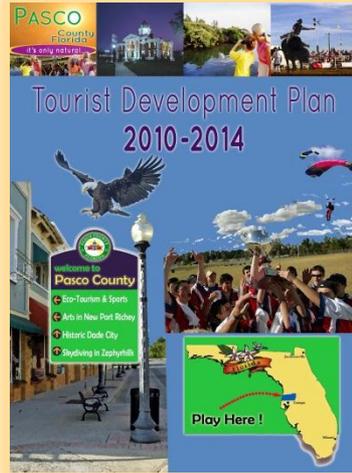
GOALS

The following Goals, **in order of priority**, will implement the Plan's Vision and Mission.

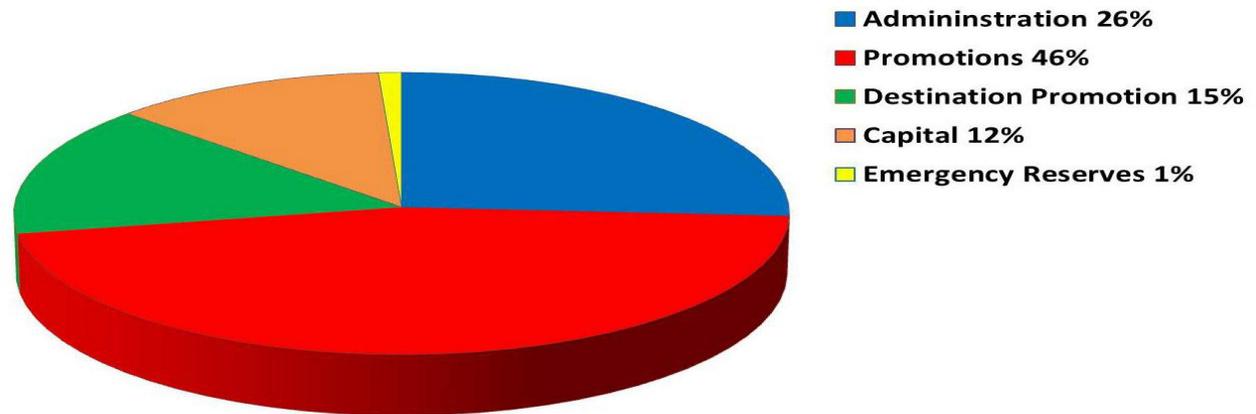
5- Create a reserve to accommodate changes in the economic travel climate and for special projects and events which promote and generate tourism to the County.

- Create a reserve





Tax Allocation



Prior to plan

| | | |
|----------------|-----|-----------|
| Administration | 10% | \$70,000 |
| Promotions | 40% | \$280,000 |
| Construction | 50% | \$350,000 |

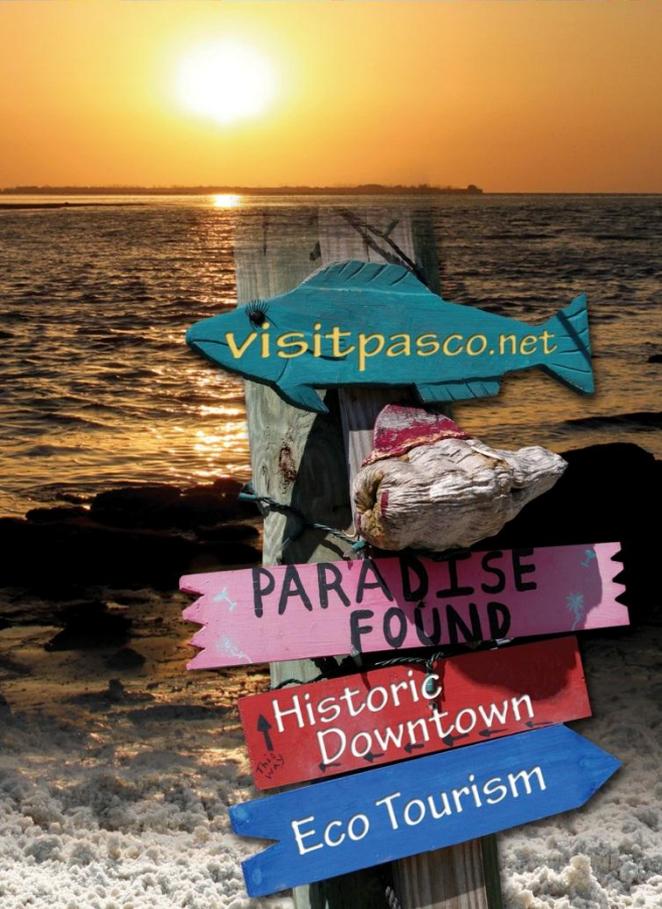
* Based on estimated \$700,000 revenue

Current plan

| | | |
|-----------------------|-----|-----------|
| Administration | 26% | \$182,000 |
| Promotions | 46% | \$322,000 |
| Destination Promotion | 15% | \$105,000 |
| Capital | 12% | \$84,000 |
| Emergency Reserves | 1% | \$7,000 |

* Based on estimated \$700,000 revenue

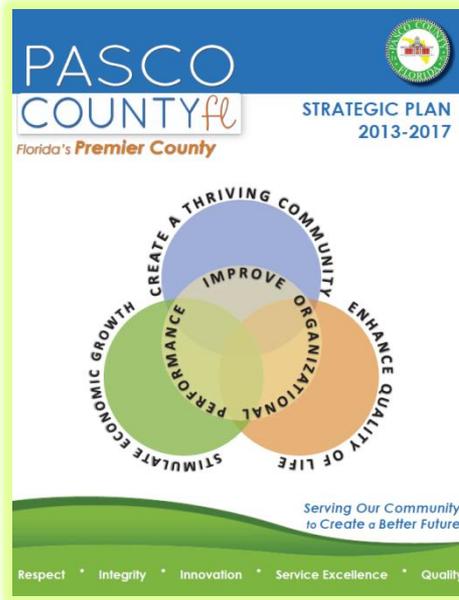
it's only natural.



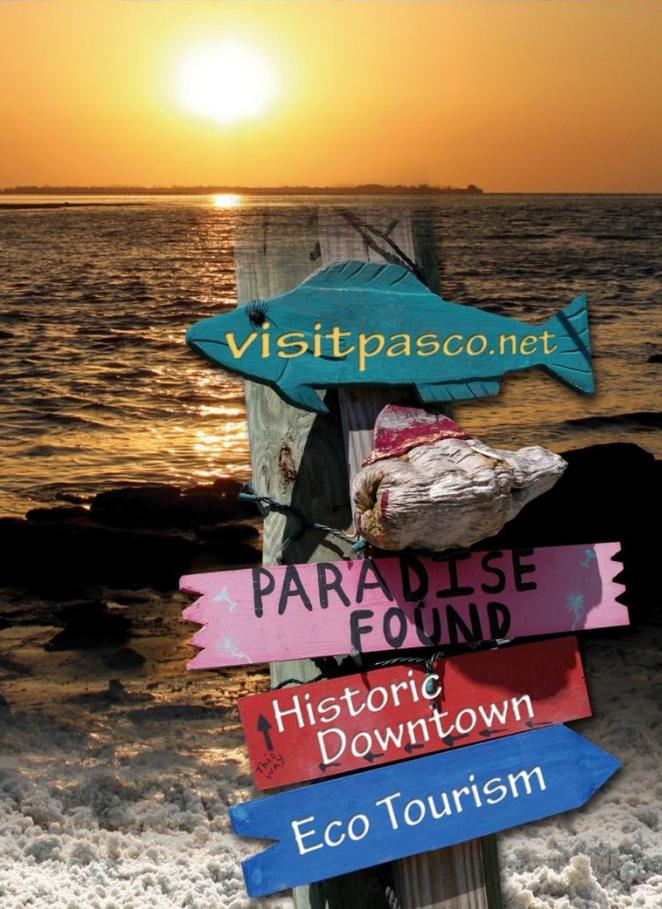
Tourism is Economic Development

Richard Gehring, Planning and Development Administrator

John Hagen, Economic Development President and CEO



it's only natural.



Tourism is Economic Development

STRATEGIC PLAN 2013-2017

Create a Thriving Community-

GOAL: Develop Pasco's identity as a collection of great places.

GOAL: Enhance the transportation network and provide sustainable multi-modal transportation choices.

Enhance Quality of Life-

GOAL: Provide social, cultural, and recreational opportunities.

GOAL: Conserve, enhance and manage the County's natural resources.

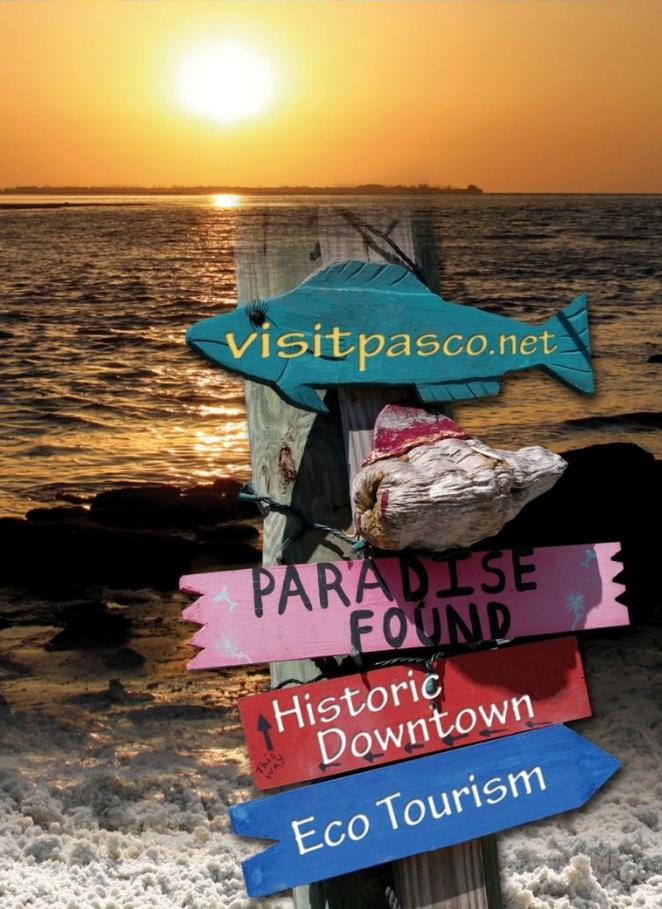
Stimulate Economic Growth-

GOAL: Become known as a great place to locate and operate a business.

Improve Organizational Performance-

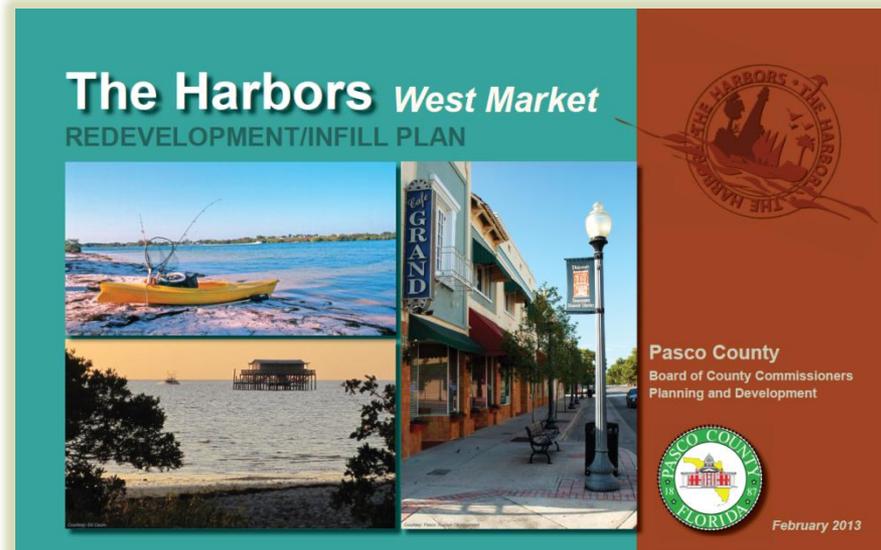
GOAL: Attract, retain, and grow a quality work force that has the proper knowledge, skills, abilities, tools, and technology.

it's only natural.



Tourism is Economic Development and Redevelopment

- "It's goal is to transform the West Market Area, also known as the "The Harbors" into a marine paradise for boaters, **tourists**, nature enthusiasts and the local community."
- "Employment opportunities, quality affordable housing, waterfront enhancement and access, **eco-tourism**, multi-modal connectivity..."
- 97 times the word "**tourism**" is utilized in the plan.



Tourism is Economic Development

Urban Land Institute-2008

AN ADVISORY SERVICES PANEL REPORT

Pasco County Florida



 Urban Land
Institute

“**Tourism** opportunities could be exploited to reinvent the area’s identity and economic vitality.”

“**Regional Trail Network:** These interconnections create additional attractions for existing residents and tourists... and would enhance the **ecotourism** branding.”

“Capitalize on existing destination uses and resorts. A critical cluster of Pasco County appears to be **sports tourism**. “

“Pasco County has approximately 3,000 hotel rooms... It is estimated the County will need to add approximately **3,500 rooms** over the next two decades.”

Tourism is Economic Development

TRAVEL DRIVES ECONOMIC GROWTH

- In 2011, travel spending generated \$1.9 trillion and supported 14.4 million USA jobs.
- Every 33 overseas travelers create one American job.

TRAVEL JOBS PROMOTE EDUCATIONAL OPPORTUNITIES

- Workers who begin their careers in travel, 1/3 earn at least a bachelor's degree.

TRAVEL SUPPORTS SMALL BUSINESSES

- Small businesses employ more than half (53%) of the travel industry workforce
- 84% (635,000) of the country's 750,000 leisure and hospitality businesses are considered small businesses.



***“Tourism is the number one service that we export.
And that means jobs.”— President Barack Obama***

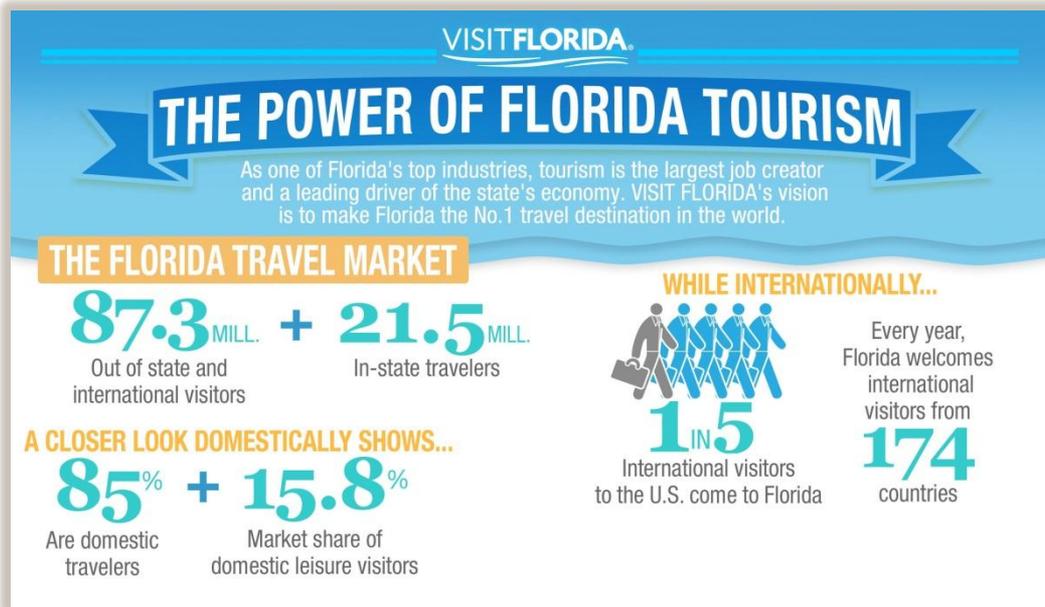


FLORIDA TOURISM SETS RECORD IN 2012 (Tampa Bay Times 2/18/13)

Gov. Rick Scott- "With the hospitality sector ending the year up 30,300 jobs, it's clear that more visitors means more jobs for Florida families."

Governor has proposed increasing Visit Florida's budget to **\$75 million, a \$31.5 million increase** from the current year.

"(We are) continuing to build on this momentum in 2013 to make Florida the No. 1 travel destination in the world," Visit Florida President and CEO Will Seccombe



\$4.0 billion in Total State Sales Tax Revenue related to Tourism

23 % of taxes collected

Pasco must continue to **invest in tourism marketing** to bring visitors to our area and generate tax revenue.

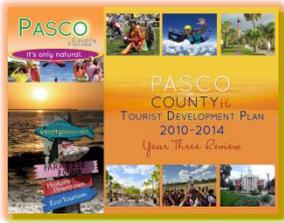
Go Big, Compete and Go Global

Year Three Highlights from Annual Review

PASCO
County
Florida
it's only natural.

PASCO
COUNTY *fl*
TOURIST DEVELOPMENT PLAN
2010-2014
Year Three Review

visitpasco.net
PARADISE FOUND
Historic Downtown
Eco Tourism



Go Big, Compete and Go Global

Year Three Highlights from Annual Review

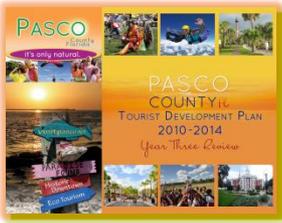
sport is our nature.



More than **9,000** room nights

40,000 participants

| | | |
|---------------------------|------|-----------|
| Two events | FY08 | \$18,500 |
| Original budget | FY10 | \$80,000 |
| Budget | FY13 | \$134,500 |
| Sponsorship with reserves | FY13 | \$159,000 |
| Requests/bids | FY14 | \$244,300 |



Go Big, Compete and Go Global

Year Three Highlights from Annual Review

Marketing



Mobile site before upgrade
(10.5%) traffic



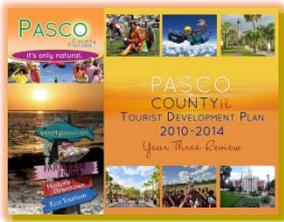
Mobile site after upgrade (28.5%) traffic

Enhanced the Facebook Page to more than **2,000 "likes"**

Mobile website reaching more than **20%** of mobile users to visitpasco.net since Oct. 2012 and up **945%** since Feb. 2011

Updated visitpasco.net- annual web visits increase by **10%**

Sports and Nature Coast FAM Tour in **2011 and 2012**



Go Big, Compete and Go Global

Year Three Highlights from Annual Review

Research & Reserves

Conduct a **new visitor profile** to identify primary reasons for visiting and to obtain research on target audience and trends.

Increase annual revenues to more than **\$1.2 million** by the end of calendar year 2013.

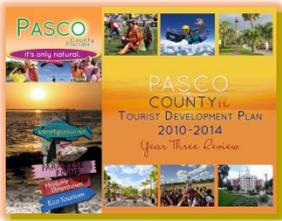
| Fiscal Year | Budgeted | Received | % Budgeted |
|--------------|------------------|------------------|---------------|
| 06-07 | \$750,000 | \$751,632 | 100.2% |
| 07-08 | \$750,000 | \$841,489 | 112.2% |
| 08-09 | \$790,000 | \$639,696 | 81% |
| 09-10 | \$740,000 | \$641,614 | 86.7% |
| 10-11 | \$620,000 | \$685,937 | 110.6% |
| 11-12 | \$620,000 | \$822,206 | 132.6% |
| 12-13 | \$650,000 | TBD | — |

2012 Tampa Bay Market Accommodation Statistics

| Destination | Occupancy | Avg. Cost | Rooms Available |
|----------------------|-----------|-----------|-----------------|
| Pasco | 57% | \$75 | 3,000 |
| Tampa-St. Petersburg | 67% | \$103 | 45,000 + |

In order to reach annual revenue of **\$1.2 million**, the **occupancy** would need to average more than **74%...**

or the **average daily rate** rise to more than **\$95.**



Go Big, Compete and Go Global

Year Three Highlights from Annual Review

Where we are going

Engage our Customers, Events and Visitors:

Content Relationship Management (CRM)– leads from Ads and all content platforms need to connect

Email Marketing

Pasco Tourism TV— Tourism programming

Social Media– Online engagement, Facebook and Twitter

Travel Blog– Ambassador content

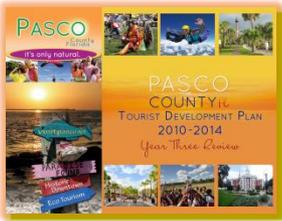
Websites- Google Analytics and Ads, Event Calendars, Mobile Website, Trip Advisor, Visit Florida, Visit Pasco

You Tube Channel

Solution:

Hire an **Advertising Agency** for content





Go Big, Compete and Go Global

Year Three Highlights from Annual Review

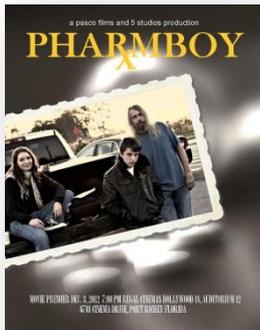
Where we are going

Engage our Customers and Visitors by:

- Attract, Develop and Promote Film Destination—enhance incentives for filming and productions.
- **Film Content Relationship Management**—support leads using Reel Scout software from the State’s Film Office.
- Conduct a **Film Familiarization (FAM) Tour**—partner with Film Florida.

Solution: One Part-time **Film Coordinator**

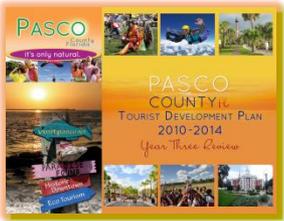
attend local events, contract management and film application process



Allocate funding and promote an Integrated International Marketing Campaign-

- With Airlines, Brand USA and Trip Advisor.
- Partner with naturist stakeholders.
- Participate in Visit Florida co-ops— for example, Toronto public relations visit.
- Participate in *Vakantiebeurs*, the Netherlands’ top consumer and travel tradeshow.





Go Big, Compete and Go Global

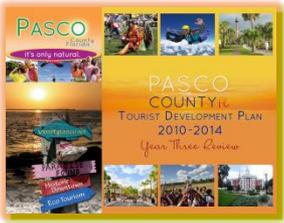
Year Three Highlights from Annual Review

Where we are going

Engage our Customers and Visitors by:

- Recognize and promote Tourism Ambassadors.
- E-Brochure, E-Kiosks (shown to the right), Bookings and Reservations— enhance the user experience with digital information online and in Tourist Office.
- Education and Hospitality Workshops—fund expert speaker engagements.
- Obtain the official destination marketing organizations accreditation from **Destination Marketing Association International** to improve effectiveness and promotions.

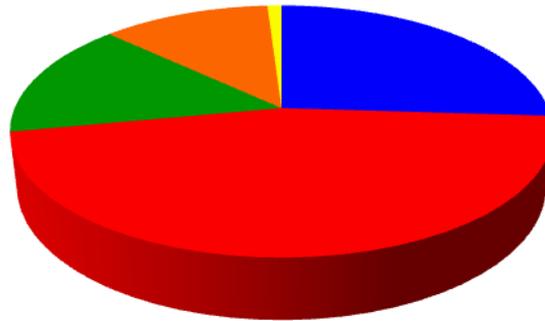




Go Big, Compete and Go Global

Year Three Highlights from Annual Review

Where we are going



- Administration
- Promotions
- Destination Promotion
- Capital
- Emergency Reserve

Destination Promotion- Beach Enhancement estimated annual cost \$9,000



Destination Promotion- Blueways, Trails and Walkways estimated construction cost \$200,000 for Coastal Trail Initiative. An estimated \$150,000 for a walkway at Hudson Beach.



Destination Promotion- Field over seeding and reservations estimated annual cost \$35,000



Destination Promotion- Hospitality Education

estimated annual cost \$12,000 - Four quarterly events \$3,000



Destination Promotion- Research Development and Tourism Technology Support estimated annual cost \$68,250

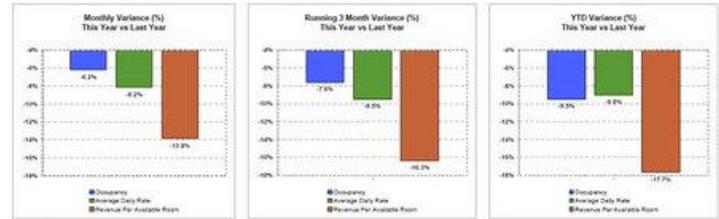
Interface Design

brand new thinking
©2012 Digital Lightbridge



Monthly Hotel Report - Total United States - October 2009

| | Month | | 3 Months Ending | | Year to Date | |
|----------------------------|----------|----------|-----------------|----------|--------------|----------|
| | Oct 2009 | % Change | Oct 2009 | % Change | Oct 2009 | % Change |
| Occupancy | 58.1% | -6.2% | 58.0% | -7.0% | 56.8% | -9.5% |
| Average Daily Rate | \$99.09 | -8.2% | \$97.46 | -9.9% | \$98.14 | -9.9% |
| Revenue Per Available Room | \$57.67 | -13.8% | \$57.01 | -16.3% | \$55.76 | -17.7% |



Source: Smith Travel Research

You may quote this data when properly attributing it to Smith Travel Research, Inc. For additional information about specific markets or STR chain chains please contact STR at 65-824-8964, or email: info@smithtravelresearch.com.



Construction cost estimated up to **\$1.5 million** Wesley Chapel District Park Phase 1; **\$3+million** and **\$250,000** to maintain and operate Phase 2. **Total \$4.75+million**



Construction cost estimated up to **\$10-14 million** West Pasco District / Multi-sports park. Enhance Mitchell Park with 4 multi-purpose fields the cost estimate is **\$2.5 million**. Rugby ready!



Construction estimated cost up to **\$1+ million** for second wakeboard run at Sun West Park. Double the size of fishing pier up to **\$1 million** (mitigation and permitting)



Destination Promotion- E-Kiosks, Signage and Wayfinding estimated annual cost \$13,000



Wayfinding for In-County marketing



Out-of-Home concept for Interstate 75

Promotions estimated cost more than **\$5,000**, partner with reservation system to track hotel stays, rent recreational equipment and assist partners who do not have technology/funding which would enhance customer service.



Promotions estimated cost up to **\$10,000** Year one
International Marketing initiative



Participate in Visit Florida co-ops –
Toronto public relations visit and participate in *Vakantiebeurs*, the **Netherlands'** top consumer and travel tradeshow.

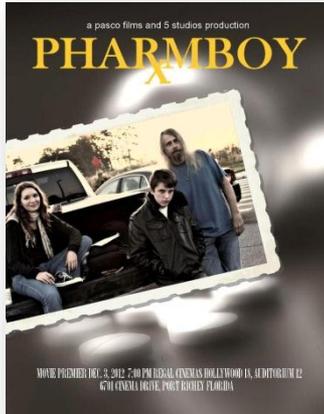
Promotions estimated cost up to **\$250,000.**
 Hire an **Advertising Agency** to manage content, website,
 email ad creative, press releases, media kit...



| (20) PUBLICATION |
|--|
| Undiscovered Florida |
| USA TODAY |
| VisitFlorida Package-Magazine, Web and eNews |
| Sports Events Planner's Guide |
| SportsEvents Magazine - Directory of Sports |
| Florida State Map |
| Birding Trail Audubon/Florida Natural |
| Southeast Sports Competitor |
| Fishing and Boating Guide/ Coastal Angler |
| Florida Sports Foundation Sports Guide |
| Sports Destination (NASC) issue |
| International Brand USA Trip Advisor |
| Fly 2 Pie St. Pete Airport ATA program |
| Heron Publishing visitor guide |
| Radio and TV thru VisitFlorida |
| It's Only Natural Interactive Website |
| Eco Tour Ad Network |
| Madden Media Canada Best of America |
| Madden Media Rich ad content vacfun.com |
| Social Media |



Administration estimated cost up to \$152,000
Hire a combination of Content, Events, Film and Sports Coordinators to manage current and new business.



- Increasing amount of weekly film leads from Los Angeles and State film office.
- Member of Film in Florida.
- Not including new incentives for film.
- Hire **part-time film coordinator**- Manage leads, photo database, permit and scouting.
- Cover several mediums and 20 plus publications .
- Hire **content coordinator**- Media and public relations, online, print and integrate the County tourism story on all mediums.
- More events equals more funding and more contract and event management.
- Pending construction/expansion of County facilities.
- Hire **sports coordinator** and part-time **events coordinator**.
- Full-Time branding, media and public relations focus by **Tourism Director** and **Tourism Manager** on building the brand, relationships and telling the story within and outside Pasco County.

**Where we are going-
Suggestions from
External Partners**

**FLORIDA
SPORTS**



Facility Needs Assessment prepared by
Stephen Rodriguez, Vice-President
Florida Sports
Presented in February 2012

KPMG

***Market Assessment Regarding a
Proposed Multi-purpose facility Pasco County***
KMPG Study
Presented in June 2001



| Facility Type | Description | Estimated Acreage/Square Ft. |
|--------------------------|---|------------------------------|
| Softball Fields | Softball complex with no less than 8 clay adult Softball fields with proper dimensions to host slow pitch softball, fast pitch softball or youth baseball. | 45 – 55 Acres |
| Multi-court Gymnasium | Multi-purpose gymnasium with no less than three (3) regulation basketball courts and lining for other sports. | 35,000 – 40,000 square feet |





- Build upon Pasco County's eco-tourism marketing, developing eco-friendly sport facilities such as **Beach Volleyball courts**, competitive **paddling courses** or **adventure racing courses**.
- Consider growth of **hotel inventory** and properties in close proximity of competition facilities.
- If the opportunity arises to construct an **aquatic facility**, whether public or private, special consideration should be made to design a facility with a **50 meter pool**.



Market Assessment Regarding a Proposed Multi-purpose facility Pasco County Study Presented in 2001

- “Pasco County **does not** have ample fiscal resources from the tourist development tax to fund a multitude of large scale projects.”
- “Greater emphasis could be placed on projects or programs that generate **new economic impact**. More particularly, the emphasis should be placed on economic impact that produces the **maximum of overnight stays** for the lodging industry.”
- **Dedicated agency** to promote the area in a proactive way.
- Create a mission statement, marketing plan, provide qualified staff, build upon existing events in market and work with other marketing agencies.
- To increase exhibit space – expand or enhance the **Fairgrounds**.
- Master Parks plan identified the need for more recreational centers.



Market Assessment Regarding a Proposed Multi-purpose facility Pasco County Study Presented in 2001 *comments in red*

Multipurpose Event Facility- accommodate spectator events, concerts, shows, sporting events, rodeos and civic events. *Construction would be premature.*

Amphitheater- outdoor facility that would seat 8,000 to 20,000. *It would not significantly increase tourism or require a large number of overnight stays.*

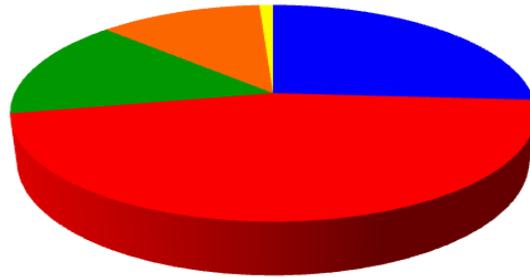
Performing Arts Center- Address the community's needs for Broadway shows, operas and other functions.. *Does not appear to be a viable candidate to receive funding*

Recreational Sports Complex- consist of either a new complex or the expansion of additional facilities in the County. *Master plan called for five new district parks and likely used by residents than out-of-town tournaments.*

Tennis Stadium- up to 13,000 seating capacity with 18-20 tennis courts to host sports and other events. *Opportunity for private public partnership.*

Spring Training Complex- outdoor baseball stadium that supports a team from MLB. *Portion of fans will stay outside Pasco County because of hotel supply ... as with tennis complex - given their proximity, number and quality of hotel rooms as well as attractions.*

Regardless of capital project... it will be essential to provide the necessary, qualified staff to effectively execute the marketing plan especially given the competitive market in which Pasco County is located.



- Administration
- Promotions
- Destination Promotion
- Capital
- Emergency Reserve

Tourism Plan Initiatives Estimated Costs

| | |
|-----------------------|------------------------|
| Administration | \$152,000 |
| Promotions | \$265,000 |
| Destination Promotion | \$487,250 |
| <u>Capital</u> | <u>\$21.45 million</u> |
| Total | \$22,354,250 |

**Where we are
going**

| County | 2013 Rental Forecast | 2012 Tourism Tax Revenues | Est. Rooms Available | Tourist Tax |
|--------------|----------------------|---------------------------|----------------------|-------------|
| Charlotte | 47,536,091 | 2,376,805 | 1,350 | 5% |
| Citrus | 19,619,287 | 588,579 | 1,100 | 3% |
| Flagler | 38,481,719 | 1,539,269 | 1,200 | 4% |
| Hernando | 10,857,285 | 325,719 | 1,000 | 3% |
| Marion | 43,698,165 | 873,963 | 4,000 | 2% |
| Martin | 29,578,630 | 1,183,145 | 1,300 | 4% |
| Pasco | 37,824,550 | 822,206 | 3,000 | 2% |

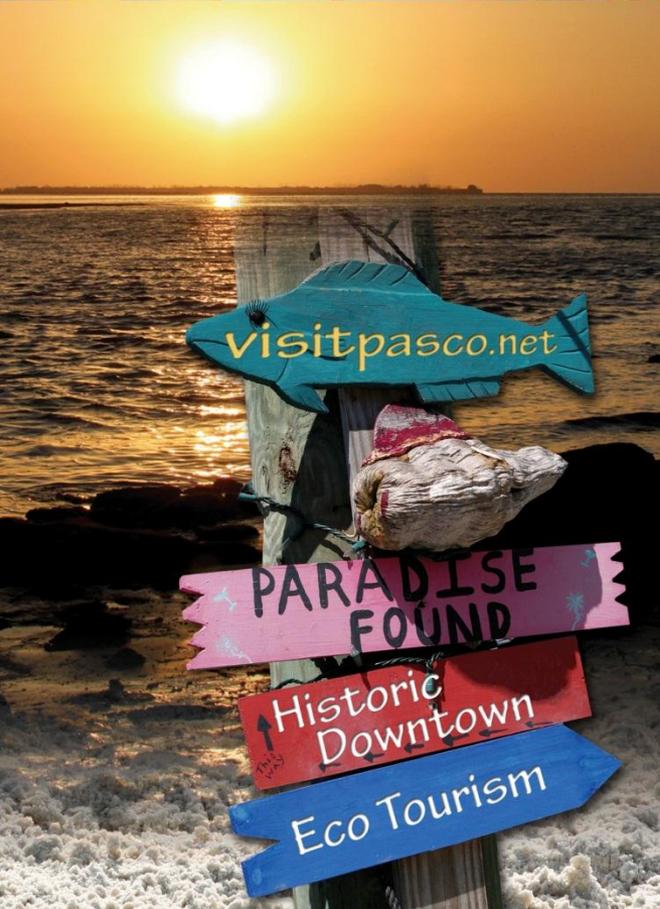
**According to Florida Legislature's
Office of Economic and Demographic Research**

| | |
|---|-----------------------|
| Pasco's utilized tourist tax rate is | 2% |
| Equals realized County revenue of | \$756,491 |
| Pasco's unutilized tourist tax rate is | 3% |
| Equals unrealized County revenue of | \$1,134,736 |
| Potential County tourist tax | 5% \$1,891,227 |

PASCO

County
Florida

it's only natural.



Tourist Tax

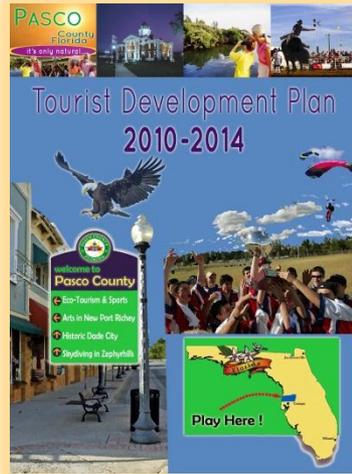
Elizabeth Blair, County Attorney's Office

Handout Tourist Dev. Tax Chart

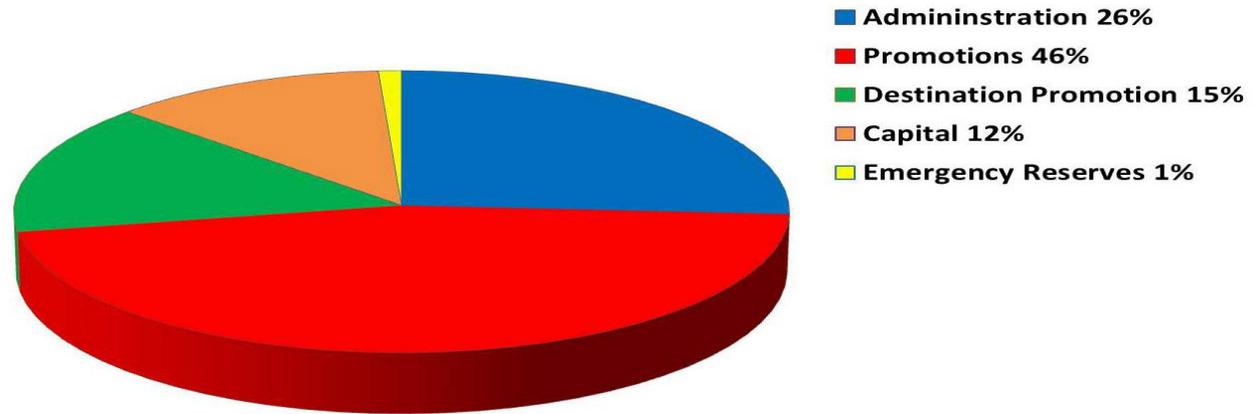
- Process for Re-allocation of Tourism Funding Allocations
- Legal Guidelines for Increasing of Tourism Tax

Chris Dorsey, Budget Director

Tourist Tax Revenue Projections Feb. 25, 2013



Tax Allocation



Current plan Based on FY 13 Revenue

| | | |
|-----------------------|-----|-----------|
| Administration | 26% | \$210,554 |
| Promotions | 46% | \$322,000 |
| Destination Promotion | 15% | \$121,473 |
| Capital | 12% | \$97,179 |
| Emergency Reserves | 1% | \$8,000 |

Estimated Tourist Tax Revenue FY14 - OMB

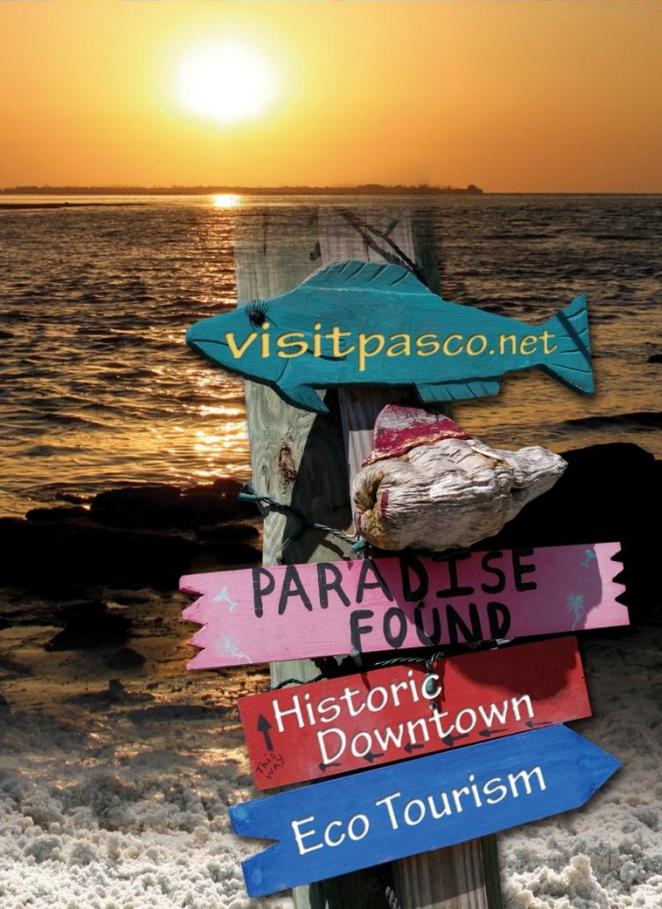
| | | |
|-----------------------|----|-------------|
| Administration | 2% | \$824,493 |
| Promotions | 3% | \$1,236,740 |
| Destination Promotion | 4% | \$1,648,986 |
| Capital | 5% | \$2,061,233 |

* Based on estimated \$809,826 revenue

PASCO

County
Florida

it's only natural.



Chris Dorsey, Budget Director

Parks and Tourism Capital Update

See Project handout



www.visitpasco.net

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Next BCC meeting: March 5, Dade City

Next TDC meeting March 20, New Port Richey