

2011 - 2015
SARASOTA COUNTY
TOURISM VISION
& STRATEGIC PLAN

ZEITGEIST CONSULTING

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INTRODUCTION

The Sarasota Convention and Visitors Bureau (SCVB) has a rich history of innovative thought when it comes to envisioning the future. It developed forward thinking Strategic Plans in 2002 and 2007 to guide the County, the Tourist Development Council, the SCVB Board and the County's Visitor Industry on "next steps" in developing and marketing the destination.

While the current economic climate could certainly cause other Destination Marketing Organizations to "hunker down" and ignore the need to plan for the future, the SCVB is anything but a typical DMO. Knowing that a recession could be the best time to begin planning for better days (rather than losing precious time by waiting for those better days to come), the SCVB elected to be ready with its vision and strategy when the recession begins to lift.

To this end, the SCVB engaged Zeitgeist Consulting to assist in the development of the 2011-2015 Destination Vision and Strategic Plan. The process began in September 2009 as Zeitgeist President Bill Geist facilitated a fast-paced Strategic Planning Retreat with members of the SCVB Board and staff, members of the TDC Board, members of the Board of County Commissioners and select industry stakeholders. He also interviewed several stakeholders and government officials individually to better understand the vision and culture of the community.

Once armed with this top level understanding of the destination and the fiscal and political realities at play, Zeitgeist performed a Destination Assessment. Patterned loosely after the "Secret Shopper" concept often utilized to enhance customer service in retail and hospitality businesses, two members of the Zeitgeist Team consumed Sarasota County as visitors for a total of eight days (four days each). They visited attractions, attended a major festival, hit the beaches, restaurants and nightspots and drove for miles, taking in the richness of the destination in the latter part of October 2009.

While we then knew what we believed to be the strengths and weakness of the destination, we needed additional data. We engaged Destination Analysts to perform two research studies during October and December of 2009. The first, an online survey of 479 consumers that had requested visitor information from the SCVB in the past three years, provided a wealth of information on the destination's strengths and weaknesses.

The second study consisted of in-depth, one-on-one 45-minute interviews with 12 professional meeting planners on their destination selection habits and their familiarity and interest in Sarasota County as a meetings destination. Destination Analysts probed these planners deeply to identify what infrastructure enhancements and fiscal or service incentives are needed to convert these individuals to becoming future clients.

From these actions (as well as reviewing past research, the destination's competition, DMO budgets and marketing programs and working with SCVB management), Zeitgeist has developed the following document and draft Vision and Strategic Recommendations. On the following page, you will find our Executive Summary, followed by our findings and the full 2011-2015 Vision and Strategic Plan for the destination and the organization.

The next step was to share our findings and recommendations with the Board of the SCVB and four community focus-groups in January 2010. Comments and suggestions from those meetings helped refine the initial list of opportunities to the final Strategic Goals for the SCVB and the destination, beginning on page 7 of this document.

Our thanks to SCVB President Virginia Haley and her professional staff for the coordination of stakeholder meetings and interviews throughout the process. Thanks to the Bureau, TDC and Board of County Commissioners for the opportunity to be of service and help define the future of your sensational destination.

You can be assured that we'll be back as leisure visitors soon.

Bill Geist
Terri White
David Bratton

10 March 2010

CONTENTS

Progress Against Prior Strategic Plan	4
2011-2015 Strategic Plan	7
<i>BACKGROUND APPENDICES</i>	
Results from September Retreat	20
Results from Stakeholder Interviews	29
Results from the Destination Assessment	32
Results from Consumer Research	44
Results from Meeting Planner Research	51
Review of SCVB's Competitive Set	59
Rationale Behind Initial Recommendations	61
Economical Impact Calculations	75
Strategic Planning Participants	77

2011 - 2015 SARASOTA COUNTY TOURISM VISION & STRATEGIC PLAN FINDINGS: PROGRESS AGAINST THE PREVIOUS STRATEGIC PLAN

Before outlining the Strategic Direction on Goals for 2010-2014, it is appropriate to look back and assess progress made on the goals set by the Sarasota CVB in 2007.

The 2007 Strategic Plan called for umbrella-level changes in tourism marketing for Sarasota County. There were four broad areas of change:

1. Increase intelligence gathering through a more aggressive research program.
2. Invest in professional sales staff to develop stronger niche marketing programs that target different audiences for different county assets.
3. Shift resources from traditional print advertising to stronger internet-based advertising and direct customer contact programs through visitor services.
4. Develop market positioning that better expresses and bundles the unique assets of Sarasota County.

Progress made against each of these four goals are chronicled below:

1. Research

- Expanded research included destination visitor intercept studies that has given the SCVB invaluable information on changing visitor behavior, especially during the past volatile year.
- The SCVB now has the ability to measure itself against key competitors in Florida.
- The SCVB can now track key measurements such as market share, visitor satisfaction and repeat visitation.
- Online surveys allow the SCVB to test website changes and advertising messages for effectiveness with target consumer groups.
- The SCVB was a participant in the first-ever national segmented research study of cultural and heritage traveler, providing a never before available glimpse into this market.

2. Expanded Sales and Niche Targeting

- Media impressions for Sarasota County have tripled as a direct result of SCVB public relations efforts.
- The SCVB developed products for special audiences that feature strong Sarasota County assets such as Circus Heritage, 30 Days of Discovery, Architectural Tour, etc.
- The SCVB expanded small group and meetings sales efforts with a resulting increase in leads to hotels. The Bureau implemented a new lead management system (iDSS) to provide better service for meeting planners and ROI calculations.
- The SCVB consistently increased the economic impact of sports events in Sarasota County year over year, with a 10% increase in the number of events held annually. Total economic impact of SCVB-generated sports events is now at \$18.6 million annually.
- The SCVB created a new ecotourism website (Discover Natural Sarasota) to capitalize on Sarasota County's investment in natural lands.

3. Shift to targeted online and web-based marketing and expanded visitor services.

- The majority of the SCVB's advertising budget is now online and targeted to visitor behavior and preference.
- Increased investment in the new SCVB website has produced a 78.6% rating (out of 100) for being informative for consumers.
- The new SCVB website has exceeded performance goals including a 50% increase in page views and consumer interactions and a 17% increase in opt-ins for the consumer e-newsletter.
- Search engine referrals have increased by 30%.
- The SCVB Visitors Center partnered with the Sarasota County History Center to provide a more well-rounded experience for visitors. The number of visitors to the Center has increased.
- Centralized ticketing for attractions in the Visitors Center has been achieved, but only attracted one arts organization to sell "day of" tickets.
- Expanded distribution of weekly calendar of events to contact points throughout county.

4. Develop positioning for Sarasota County that better focuses on assets.

- Visitor brand awareness of the “Go Beyond the Beaches” campaign has grown from 40% to 46%.
- SCVB advertising is now driving 41.9% first time visitors to Sarasota County, an increase from 37% in 2007/08.
- The new “Go Beyond the Beaches” advertising campaign is attracting our ideal visitor, with destination spending far above the average Sarasota County visitor (\$2,718 per trip per party, compared to \$2,249).
- By moving to an asset-based campaign in 2008 with “Go Beyond the Beaches,” the SCVB has increased its conversion rate from 52.5% in 2007 to 76.8% in 2009.

This summary of key results certainly indicates that the SCVB’s shift from generic, mass-market promotion through traditional media outlets and sales efforts to more targeted messaging and increased utilization of online resources has proven to be a success for the destination.

With such a positive track record in hand, it is now time for the SCVB to focus on the future.

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2011 - 2015 SARASOTA COUNTY TOURISM VISION & STRATEGIC PLAN SUMMARY

The *2007 Sarasota County Tourism Vision & Strategic Plan* focused primarily on the need to evolve the Sarasota Convention & Visitors Bureau's sales and marketing efforts to a more sophisticated level. Having achieved a significant level of success in this arena, the organization is now able to take a larger role in the development of the visitor industry in Sarasota County. And, as tourism development is not a primary focus of the current Economic Development Corporation's 5-Year Strategic Plan, the SCVB sees a responsibility for addressing the growth of the destination as well as its customer base.

Thus, the *2011-2015 Sarasota County Tourism Vision & Strategic Plan* focuses on three main Goals:

- *Employing Enhanced Marketing and Sales Tactics*
- *Increased Investment in Destination Marketing*
- *Destination Enhancing Development*

Employing Enhanced Marketing and Sales Tactics: The destination has benefited from a targeted repositioning of its messaging over the past few years. In order to continue to increase consumer awareness and visitor spending, additional tactics should be employed to maximize the opportunities in the leisure and group markets.

Increased Investment in Destination Marketing: Sarasota County has benefitted from some significant destination developments in the past few years including securing the Baltimore Orioles Spring Training, developing the rowing facility at Nathan Benderson Park, engaging in beach enhancements and the launch of the Ringling International Arts Festival, just to name a few.

Thus, the need over the next few years will be increased marketing of these and other destination assets. The Return-on-Investment (ROI) of destination marketing has proven to be exceptionally high, given the successes realized after the County directed an additional .5% to the SCVB in 2008. Additional investment in the SCVB (scheduled to be implemented in 2011) should provide an even greater ROI to the county.

However, the plan to limit such funding to two years will prevent the SCVB from adding the professional sales and marketing personnel that will be needed to increase the destination's targeting of event planners that could bring large groups to the area during periods of acute need.

Destination Enhancing Development: As noted, there has been great progress made in developing new destination products. As many community stakeholders indicated in our discussions, it is now more about “connecting the dots” and making strategic improvements to the destination to enhance the great product already in place.

Naturally, most of these opportunities before Sarasota County require additional investment of revenue to bear fruit at a time when such revenue is becoming scarce. However, the increase in the SCVB’s sales and marketing budget was a significant step forward, and one that is paying significant dividends in increased visitation and spending. Indeed, just counting first-time visitors to the county that said they were prompted in their decision-making process by seeing or hearing SCVB messaging, the Bureau helped attract over \$38.9 million in spending, generating over \$3 million in local and state taxes and supporting 750 full-time equivalent jobs.

Research also reveals that Sarasota County’s visitors are generally pleased with the destination as it is, evidenced by the high incidence of return visitation, year after year. Thus, there does not appear to be any significant weakness in attractions and infrastructure holding the destination back from its potential. Instead, it is a matter of stepping up the marketing of Sarasota County so that more consumers are encouraged to give the destination a try. Once they do, most come back time and time again.

The product development stage has been initiated and, in many cases, successfully completed. Enhancements should always be considered to keep the product fresh. However, an increased and sustained investment into tourism marketing is vital for the future of the destination at this juncture.

The details of the *2011-2015 Sarasota County Tourism Vision & Strategic Plan* follows:

GOAL ONE

EMPLOY ENHANCED SALES & MARKETING TACTICS

DESIRED OUTCOME:

The destination executed a strategic redirection of the marketing messaging over the past three years that has yielded impressive results in destination awareness, intent to travel and visitation. The destination now has the opportunity to refine its strategies even more to attract the kinds of visitors the community desires. The following strategies outline many of the possibilities to increase market share in select, high value niches.

OBJECTIVE A

Continue to Refine the Message to Maximize Market Conditions

While the upscale message has been successful in positioning Sarasota County as an aspirational experience, consumers may now be viewing the destination as out of their financial reach, when nothing could be further from the truth.

Suggested Tactics:

- Refine the underlying destinational message to that of “Affordable Luxury”
- Communicate that this is the perfect time to pamper oneself without breaking the bank, especially during shoulder seasons
- Suggest that a Sarasota County experience is within reach
- Develop experiential packages that subtly reinforce the value of a Sarasota County getaway
- Stress the diversity of experiences that await visitors (e.g., “Arts and Alligators” or “Chopin and Sharks”)
- Communicate the proximity of SRQ to destination attractions to position Sarasota as being unique from its competitors, few, if any, of which can make similar claims (e.g., “7 minutes from the airport to the beach,” “3 minutes from the airport to world class art,” etc.)

OBJECTIVE B

Continue to Pursue Opportunities in Online and Mobile Marketing

With four in five consumers utilizing the internet to plan their travels, the visitor industry has focused heavily on these consumers over the past few years. However, as the internet is spawning new communication vehicles (social media, mobile, etc.), the destination needs to continually update its presence and offerings.

Suggested Tactics:

- Continue to expand and refine the events calendar on the SCVB website to become THE central calendar for the county
- Build “Do-It-Yourself” itinerary-building capability into the website
- Continue to develop innovative packages to incent consumer choice
- Continue to develop enhanced search capability on the website to speed visitors to the information they crave
- Develop a mobile-specific website and possible apps for mobile platforms
- Create an opportunity for consumers to self-select their personality online to be presented with the perfect experience through the SCVB’s MySarasota web portal

OBJECTIVE C

Increase Pursuit of the Sports Tournament Market

Sarasota is perfectly positioned to be one of the top sports tournament destinations in Florida, thanks to its central location, inventory of traditional (or not so traditional) venues and an extensive mix of limited service hotel properties. With the acquisition of the Baltimore Orioles Spring Training, the development of the rowing complex and its existing inventory of sports facilities, the destination can compete effectively in this lucrative market. Maximizing this market is contingent upon additional and sustainable investment in tourism marketing.

Suggested Tactics:

- Continue to identify and pursue groups and events that would complement existing (and future) sports tournament venues
- Work with industry partners to develop compelling bid packages
- Develop tournament services that position Sarasota County as cutting edge in the minds of event planners
- Search for opportunities to attract more college and high school teams to train in Sarasota County during winter months

OBJECTIVE D

Analyze Additional Opportunities in Niche Group Markets

The future of leisure and group sales is likely to be identifying niche markets in which a destination has a physical or cultural advantage and focusing tightly on those markets. The pursuit of any additional markets, however, is contingent upon additional and sustainable investment in tourism marketing, as virtually all of these markets would require additional sales professionals to service these markets.

Suggested Tactics:

- Continue to identify and pursue niche markets in which Sarasota County has a competitive advantage over other destinations, such as (but not limited to):
 - Small Corporate and Association Meetings
 - Arts, Culture and Design Meetings
 - Wedding / Romance Tourism
 - Eco-Tourism and Outdoor Recreation Events
 - Events for which a Culinary focus is Important
 - Minority Markets
 - Alternative Lifestyle Markets
 - Select International Markets
 - Groups that Meet during Shoulder Seasons and Summer
 - Those that Visit Friends and Relatives (VFR)
 - Groups for which Golf is a Motivation
 - The Baltimore/DC/East Coast Market to Maximize the Addition of the Orioles to the Destination

OBJECTIVE E

Enhance the Level of Visitor Services

Research shows clearly that consumers who visit Sarasota County have a considerably enhanced view of the destination than those who haven't visited. Thus, customer service is a vital function to create positive word-of-mouth buzz about Sarasota County. The destination needs to consider ways to increase the amount of information that is available to both prospective visitors and those that are in-destination through visitor information centers and working with high-traffic attractions. Again, developing enhanced customer experiences is contingent upon additional and sustainable investment in tourism marketing.

Suggested Tactics:

- Analyze opportunities to develop an advanced destination “concierge” service, taking visitor information services to a new level
- Partner with area attractions and hotels to develop enhanced training programs for frontline employees so that everyone a visitor meets is a destination ambassador

GOAL TWO

INCREASED INVESTMENT IN TOURISM MARKETING

DESIRED OUTCOME:

That the Visitor Industry is supported as a key component of the economy of Sarasota County. Such support will translate into a keener understanding of the value of tourism to economic development and the region's Quality of Life. Such an understanding will enable public and private sector leaders to realize the Return-on-Investment (ROI) that is possible through greater investment into marketing the destination. Indeed, counting only first time visitors to the region that considered Sarasota County upon seeing its destination marketing message, the SCVB helped attract over \$38.9 million in visitor spending to the county in 2008. That level of spending translates to over \$3 million in state and local taxes and supporting 750 full-time jobs. Increasing investment into tourism marketing will spur these impacts even higher.

OBJECTIVE A

Increased Awareness and Support for the Visitor Industry

A strategy of public outreach to communicate the value of the visitor industry on the economic vitality and quality of life for all residents should be initiated.

Suggested Tactics:

- Continue to develop statistics that reinforce the ROI of the Visitor Industry
 - The generation of non-resident taxes
 - Jobs maintained and created
 - The impact on non-tourism businesses
 - The impact on enhancing arts and culture
 - The connection between visitation and investment in the County
- Identify individuals and stories that can more effectively communicate the message than statistics ever will
- Utilize these individuals and stories through various strategies
 - Public Relations stories in local media
 - An awareness campaign in cooperation with local media
 - Board visits to Editorial Boards and other media management
 - Presentations to government bodies
 - Presentations to area service clubs and civic organizations
 - Discussions with neighborhood groups
 - Meetings with thought leaders throughout the county

OBJECTIVE B

Increase Investment into Tourism Marketing

The destination needs to take aggressive steps to increase its sales and marketing budget to a more competitive level. The majority of Sarasota County's competitors for visitor and event dollars are operating with significantly larger promotional and sales budgets. While size isn't everything, these larger budgets enable the competition to connect with the consumer on a more regular basis than can Sarasota County at its present budget level.

Suggested Tactics:

- Utilizing past ROI statistics, project what types of impacts on visitor spending, tax generation, job creation, etc. could be realized with the investment of the final half penny of Tourist Development Tax remaining to the County
- In coordination with stakeholders and thought leaders from community, encourage County Leadership to remove the planned expiration of additional marketing funds (scheduled for FY12) and invest additional revenues into tourism marketing
- Review and analyze other revenue generation mechanisms being successfully employed by other Destination Marketing Organizations

GOAL THREE

DESTINATION ENHANCING DEVELOPMENT

DESIRED OUTCOME:

That Sarasota County's visitor infrastructure continues to evolve, innovate and improve. Successful destinations do not rest on their laurels, but are always seeking to develop new products and experiences. In this ultra-competitive tourism marketplace, Sarasota must continue to enhance its infrastructure to remain relevant and desirable in the eyes of the consumer.

OBJECTIVE A

Enhance Destination Transportation & Parking

The SCVB should work with the County's Chambers of Commerce, the EDC, local and state government and other stakeholders to identify opportunities to continuously improve transportation and parking throughout the County.

Suggested Tactics:

- Work with the business community to identify clear bottom-line rationales and potential incentives in order to increase flights into the Sarasota Bradenton International Airport
- Prepare a unified marketing/sales approach targeting domestic and international carriers that includes active involvement from the County's Chambers, EDC, CVB, government and major corporations
- Identify opportunities (and potential revenue streams) to develop year-round trolley service throughout the destination as a way to enhance the experience and decrease congestion and parking issues
- Work with local governments to identify whether parking concerns are real or perceived and to generate solutions for either scenario

OBJECTIVE B

Enhance Destination Wayfinding Signage

The City of Sarasota is embarking upon a much needed program to enhance directional signage. The SCVB should work with the City, other municipalities and the County to coordinate efforts to increase destination signage throughout the county.

Suggested Tactics:

- The SCVB should continue to interface with the City of Sarasota, representing the needs of the visitor for a destination sign program, ensuring that the county's Visitors Center is central to the design of the system
- Work with other municipalities and Sarasota County to better understand existing restrictions or policies that have prevented wayfinding signage in the past
- Encourage municipalities and the County to enhance existing signage as a way of increasing spending throughout the county and, thus, increasing tax revenues for other programs

OBJECTIVE C

Develop Additional Tournament Facilities

The destination should support niche sports developments, such as the rowing facility at Nathan Benderson Park and other unique magnets for sports teams to train during the winter and spring. While seemingly every destination has (and continues to build) soccer, softball and baseball fields, Sarasota County should assess potential demand for facilities used by less traditional sports. In this way, the county can position itself where competition for tournaments and training from other destinations is less aggressive.

Suggested Tactics:

- Advocate for the completion of the rowing facility
Identify ways that the SCVB can market the facility as a team-building offering to meeting and event planners as a way not only to increase the attractiveness of the destination but, also to develop additional revenue streams for the facility to increase its financial viability
- Work with industry partners to bring the Cal Ripkin Baseball Facility to Sarasota County
- Analyze growth of existing tournaments to identify which existing facilities are in need of expansion to maintain existing tournaments
- Identify sports for which Florida and the Southeast do not have the quality or quantity of facilities with which to attract tournaments and, if appropriate to Sarasota County, advocate for facility development

OBJECTIVE D

Support Development of Full Service Hotels and Resorts

The limited inventory of hotel rooms appropriate to hosting large meetings and conventions works against the notion that the destination needs a convention center. Thus, for a convention center to succeed, the destination needs more full service hotels with meeting space.

Suggested Tactics:

- Court experienced developers of private sector convention center hotel and/or resort combinations
- Work with local governments to encourage “appropriate” hotel and resort growth throughout the County that enhances the destination’s brand
- Investigate the availability of incentives and tax-relief strategies to make the destination more attractive to developers

OBJECTIVE E

Maintain and, Where Appropriate, Enhance the County’s Beaches

While several other competitive destinations along the Gulf of Mexico are developing more modern amenities on their beaches, it is clear that the residents of Sarasota County prefer their more natural shoreline. Thus, the County must continue to invest in beach maintenance and non-invasive enhancements.

Suggested Tactics:

- Be a strong advocate for the maintenance of the county’s natural beaches, already considered among the best in the country, without further development
- Encourage enhancement of existing beach facilities (e.g., restrooms, parking lots, signage, etc.)
- Analyze opportunities to advocate for increased beach access in areas where existing developments could be enhanced

OBJECTIVE F

Enhance the Destination's Festival Calendar

With the fierce competition for consumer attention, destinations search for an ever expanding number of reasons to lure visitors. An exciting and diverse festivals and event calendar can often be the reason for selecting one destination over another. Events that have the potential to generate significant visitor interest and media attention (such as the Ringling International Arts Festival) should be actively supported.

Suggested Tactics:

- Work with existing festival and event planners to better understand their mission, vision and ability to become a “Destination-Defining” event (e.g., Spoleto, the Newport Jazz Fest, Mardi Gras, etc.)
- Analyze ways the SCVB can assist in more effectively marketing those events that desire destination-defining status (e.g., providing direct marketing assistance and advertising buys in lieu of grants to event producers)
- Work with local governments to streamline the event permitting process