



2022 Strategic Planning Summary

Presented By : HCP Associates

What is Strategic Planning?

- Community and staff-driven reevaluation of VSPC
- Clarifies the mission and vision of the organization
- Provides guidance for changes to the organization's structure and service focus
- Three different roles that VSPC can play:
 - **Own** – VSPC is primarily responsible
 - **Partner** – VSPC supports through partnerships
 - **Advocate** – VSPC speaks in favor of and points to supportive organizations
- Emphasis placed on
 - Increasing the economic impact of each visitor
 - Developing the assets of the region
 - Increasing the economic benefits of tourism to the local community
 - Deepening partnerships across Pinellas County



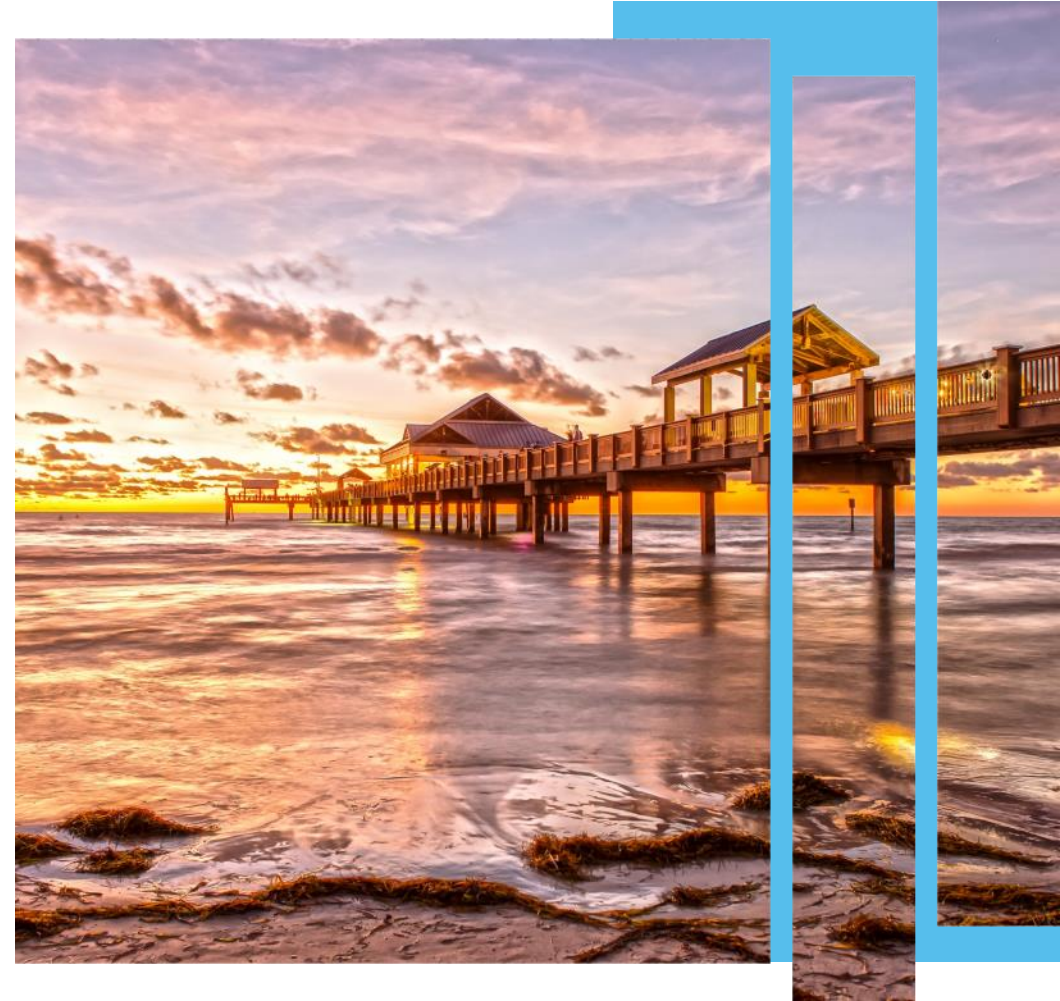
Strategic Planning Process

- To create Visit St. Pete-Clearwater's next strategic plan, multiple methodologies were utilized to hear from local leaders, residents, VSPC staff, and more
- This approach is split into six phases:
 1. Telephonic Stakeholder Interviews
 2. Online Stakeholder Survey
 3. Community Sentiment Survey
 4. Industry and Visitor Analysis
 5. Stakeholder Workshops
 6. Strategic Planning Workshop



Stakeholder Interviews

- Individual interviews with key figures in Pinellas County Tourism
- Stakeholder interviews were segmented into four groups:
 - VSPC Staff
 - Asset & Product
 - Includes hoteliers, museum directors, tourism-serving businesses, and more
 - Government & Infrastructure
 - Includes county and city governments, airports, transit operators, and more
 - Community & Partnerships
 - Includes nonprofit community groups, environmental organizations, business groups, and more
- 46 total stakeholders were interviewed
 - 12 for each group



Online Stakeholder Survey

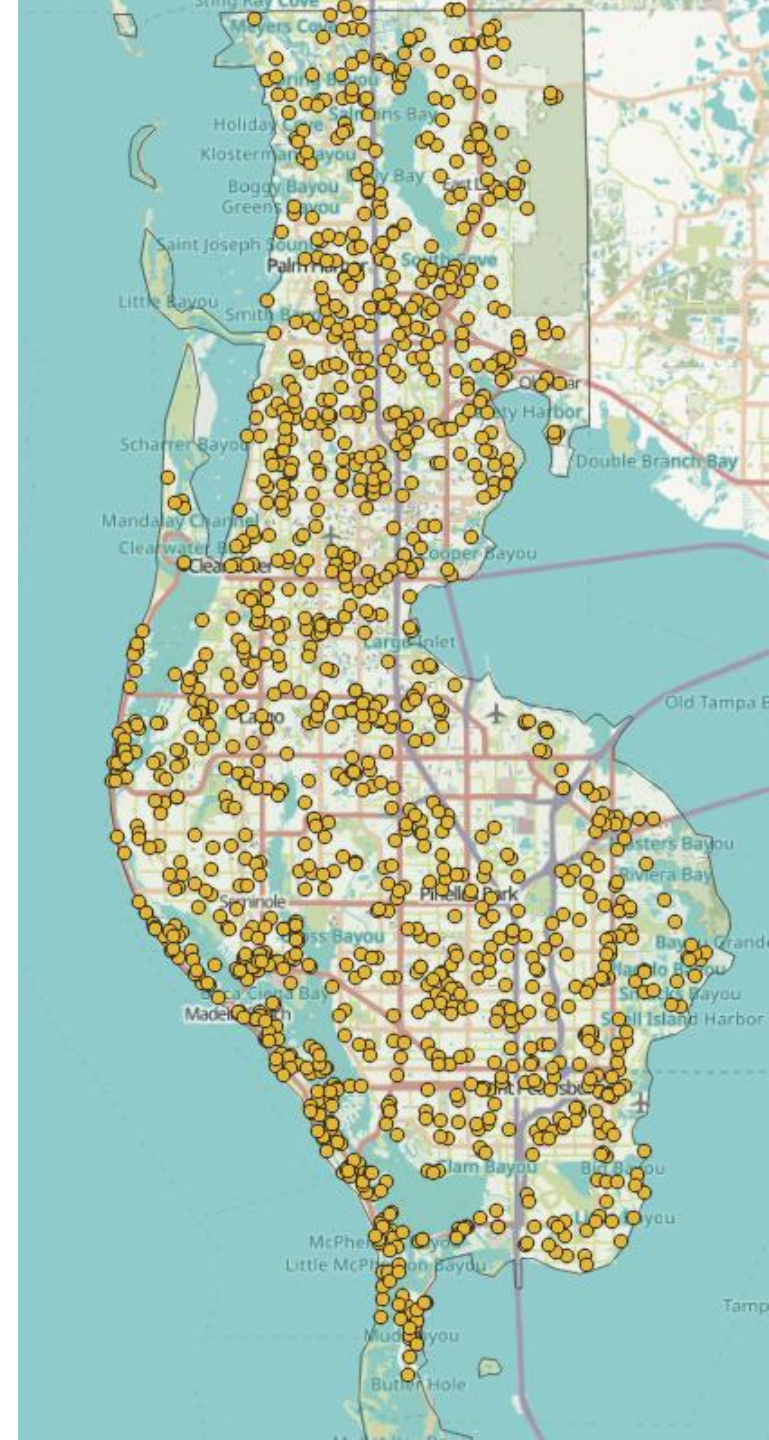


- Online Survey deployed to stakeholders across Pinellas County
- Data collected from 09/30/21 – 12/15/21
- 233 total responses
- Feedback provided additional insights to telephonic stakeholder interviews

Community Sentiment Survey

- Telephonic survey of **1,300** Pinellas County Residents
 - Explored residents' perceptions on tourism's impacts and benefits to their lives as Pinellas Residents
- Data collected from 10/08/21 – 11/22/21
- Representative according to the following demographics:
 - Gender
 - Race/Ethnicity
 - Age
 - Geography
 - Education

*Each circle on the map to the right represents a respondent's location



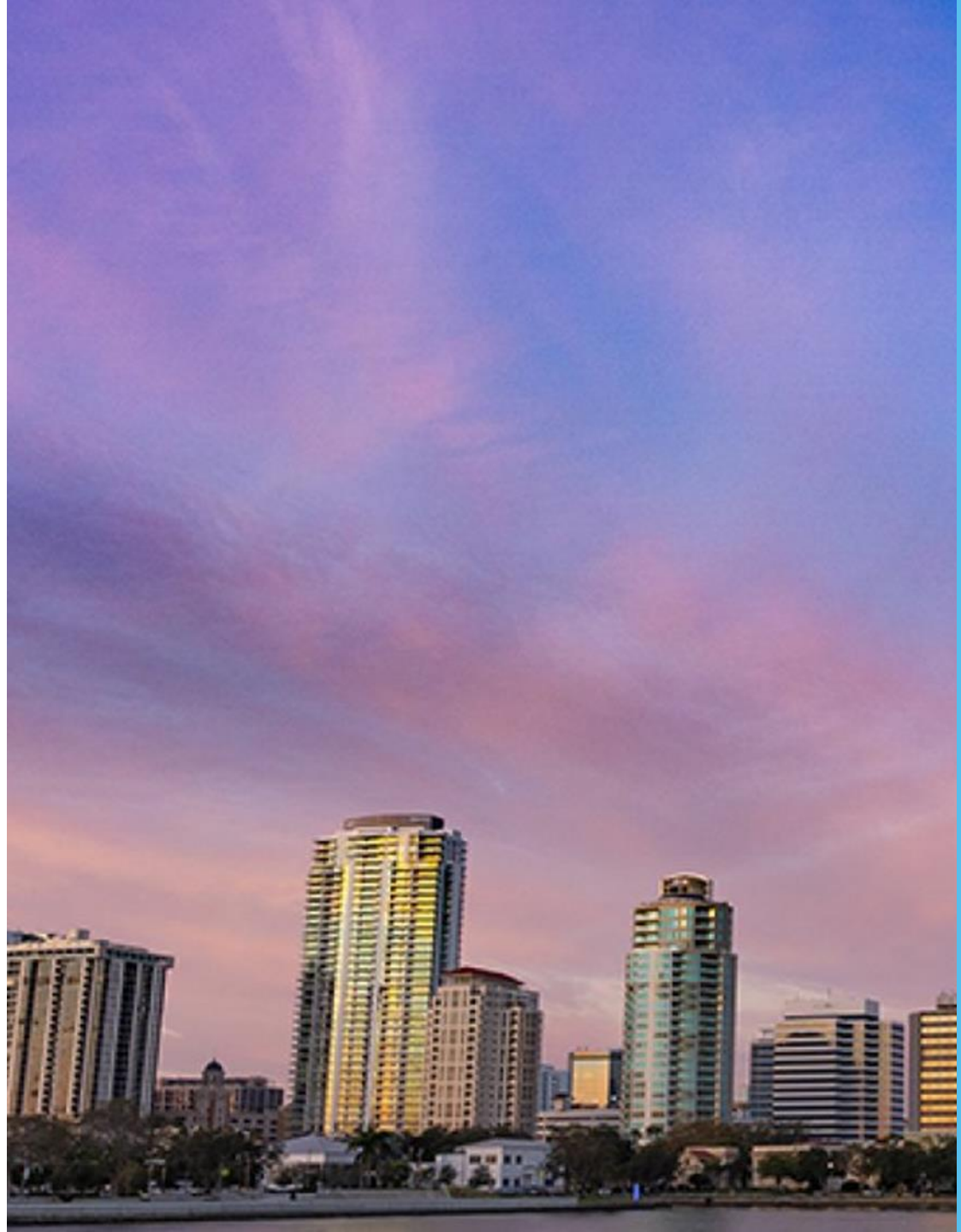
Industry and Visitor Analysis

- Supplemental Research including review of:
 - VSPC metrics
 - Prior strategic objectives
 - Other DMO's strategic plans
 - Reports and news stories about trends in tourism



Strategic Planning Workshop

- All-day meeting with VSPC staff to review key findings and make determinations on their implications
- Occurred on 01/27/2022
- First half was all VSPC staff; second half was VSPC senior leadership
- Reviewed the organization's strengths, weaknesses, opportunities, and threats
- Key strategic outcomes following data collection were discussed



Stakeholder Workshops

- Presentations of resident and stakeholder findings, as well as group discussions with external stakeholders about the results of the Strategic Planning Workshop
- **Three** half-day sessions
 - 01/31/2022 afternoon – North County
 - 02/01/2022 morning – Mid County
 - 02/01/2022 afternoon – South County
- Stakeholders discussed the preliminary outcomes and provided new insights



Top-line Findings from Stakeholders



Pinellas County's **primary appeal is as a beach-focused, family-friendly, welcoming destination** that has so much more to do once you are done with the sand – **like arts and culture – “beaches plus”**

- Stakeholders agree that few or no destinations offer the same experience bundle as Pinellas
- Protecting the area's **historically hospitable culture** and “vibe” is essential
- **Arts & Culture** seen as a strong growth area

Dunedin, Tarpon Springs, Safety Harbor, and eco-tourism / outdoor adventure tourism are **hidden gems worth exploring** further in messaging



Transportation (including parking), Red Tide, Affordability, and finding out about all the **unique experiences in the county** are all cited as challenges facing the area

Broad consensus that VSPC needs to **message more internally – to residents on the value of tourism**, but also to **visitors on the different experiences** at their fingertips



Top-line

Findings from Stakeholders (continued)



General support for **sponsoring more distinctive events** within the County that would **draw outside visitors** – **more signature festivals, parades, etc.**



Strong but not unanimous consensus that a **convention center is not the best call** for boosting meetings & conventions; instead, **focus on new hotel inventory** that can support on-premise meetings



Agreement that **county-operated sport facilities** would be an important **boost to sports & events**



Agreement that VSPC should **do more to coordinate** with local industry on a wide variety of topics – from **workforce to promotion**

Differing opinions **on capital vs. marketing use** of TDC funding; however, broad agreement that the **district requires robust marketing** (“the place doesn’t sell itself”)



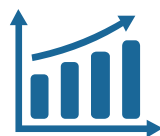
High-level Findings from Residents

Residents broadly support tourism within Pinellas County:



91%

believe that tourism is important for the future of Pinellas County



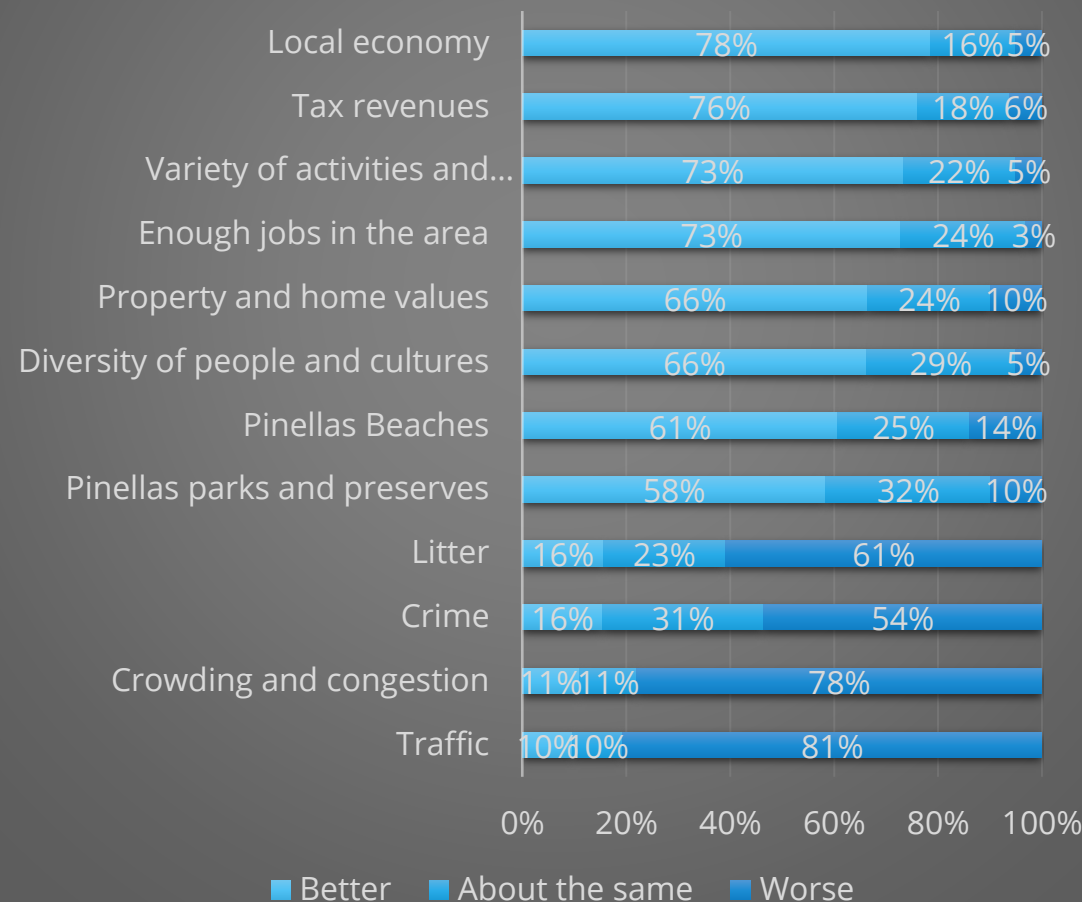
85%

believe that tourism benefits everyday residents of Pinellas County

However, residents do believe that tourism brings some drawbacks – especially regarding **litter, crime, crowding, and traffic**

92% of Pinellas residents say that they experience noticeable changes in their commute on a seasonal basis

Would you say that tourism makes these aspects of life better, worse, or about the same for Pinellas County?



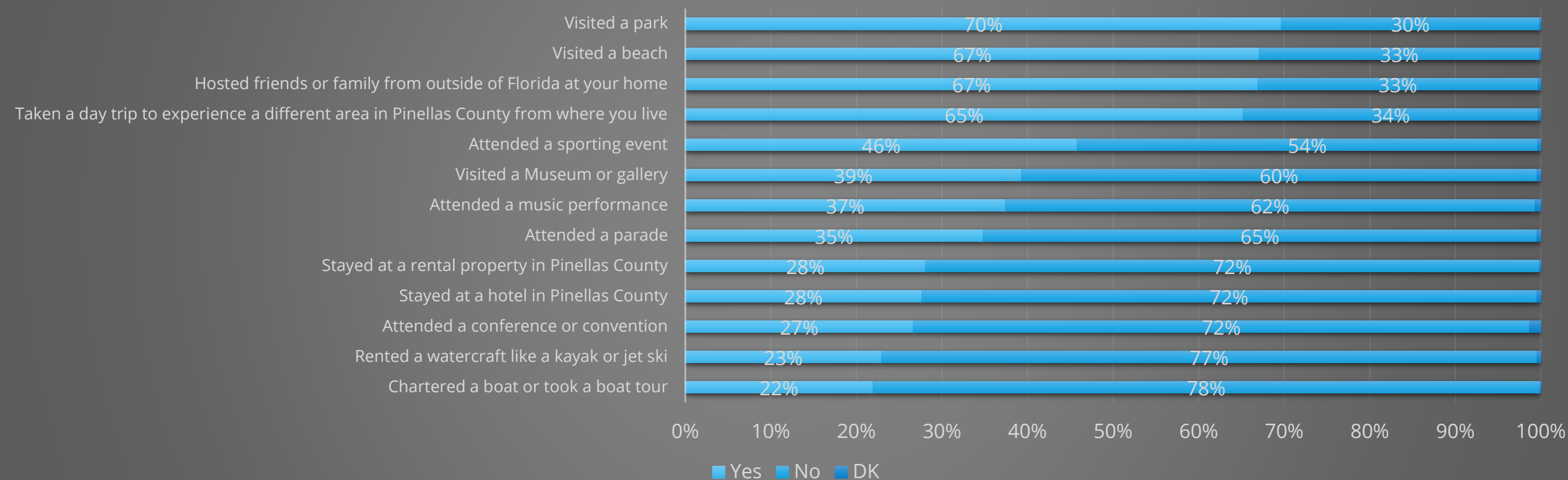
High-level Findings from Residents (continued)

In fact,
88% of residents recommend Pinellas County as a place to both **live and vacation**



Residents don't just believe that tourism contributes to the breadth of activities in Pinellas County – they utilize these amenities and attractions themselves

In the last year, have you done any of the following in Pinellas County?



Strategic Outcomes



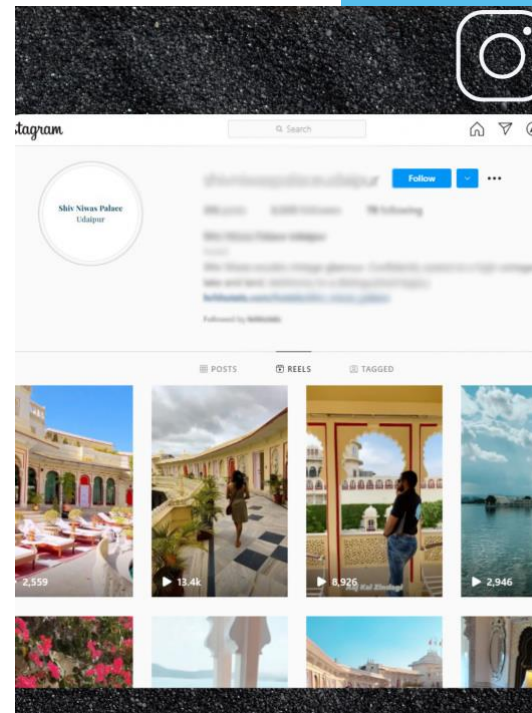
Ownership

Ownership is the highest level of responsibility for the organization. Ownership strategies are those over which VSPC should have direct leadership. Based on these strategic priorities, VSPC should consider how it changes to incorporate them.



Emphasize the Marketing and Storytelling Focus

- As a DMO – Destination **Marketing** Organization – the primary function of VSPC is telling the story of the destination
- Secondary research suggests that traditional print + digital, which necessary and effective, are now insufficient to reach the newest generation of vacationers
- Secondary research also shows that DMOs have been engaging new channels, including YouTube and TikTok
 - VSPC already produces stunning content for YouTube
- Stakeholders – especially those in the attractions and hoteliers category – insisted on holding true to the core function of the DMO
- Staff expressed a desire to deepen the marketing department and fill vacancies within it



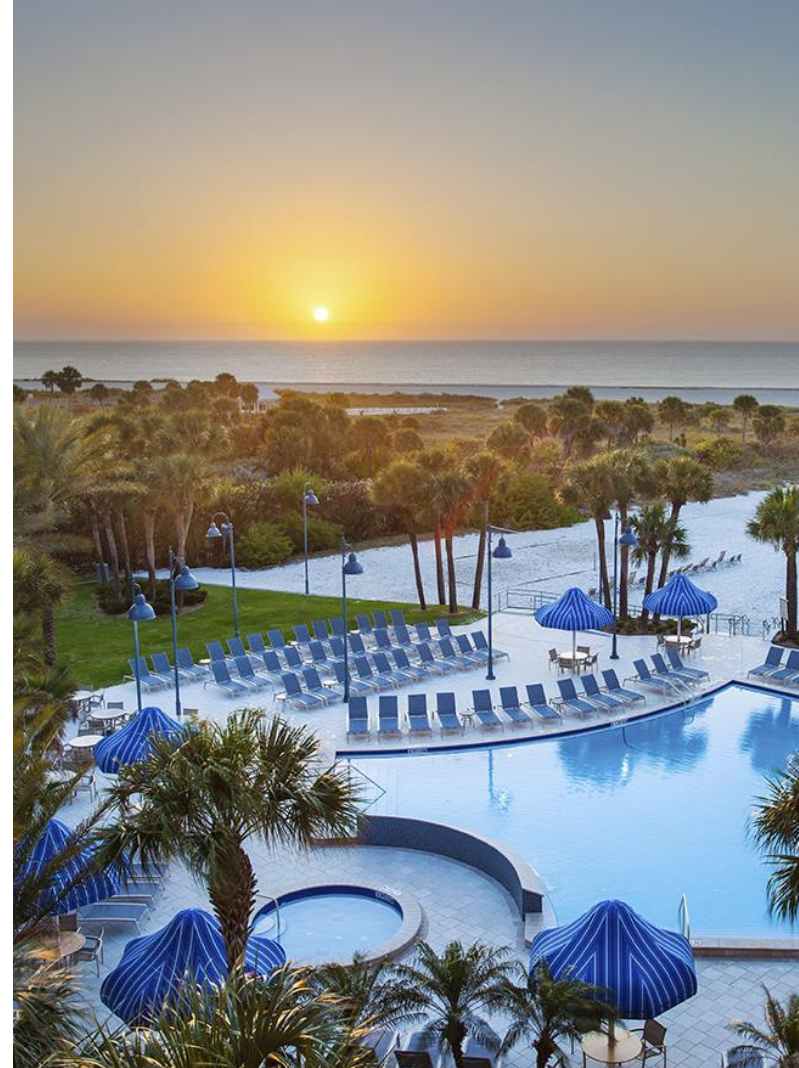
Explore More Bold, Targeted, and Innovative Storytelling Strategies and Channels with High ROI

- Stakeholders outside of St. Pete and Clearwater expressed an interest in more content that features other parts of Pinellas County
- However, stakeholders also affirmed the primacy of the Beaches – especially Clearwater – and Downtown St. Pete as crucial drivers of the region's tourism
- Secondary research suggests that traditional print + digital, which necessary and effective, are now insufficient to reach the newest generation of vacationers
- Stakeholders felt that the sheer variety of activities and experiences in Pinellas County is hard to capture in a single ad.
 - Targeted marketing strategies allow for different messages that speak to these various components to be served to those most interested in each



Be the Liaison Between Hoteliers and the Destination to Drive Increased Tourist Capacity

- Stakeholders expressed concern about rising costs of hotel rooms brought on by increased demand
- Stakeholders expressed concerns about aged inventory in the region
- Staff expressed concern that VSPC was not consulted about redevelopment and new hotel and convention plans
- Staff desired to maintain a comprehensive understanding of hotel inventory in the area to better guide decision making

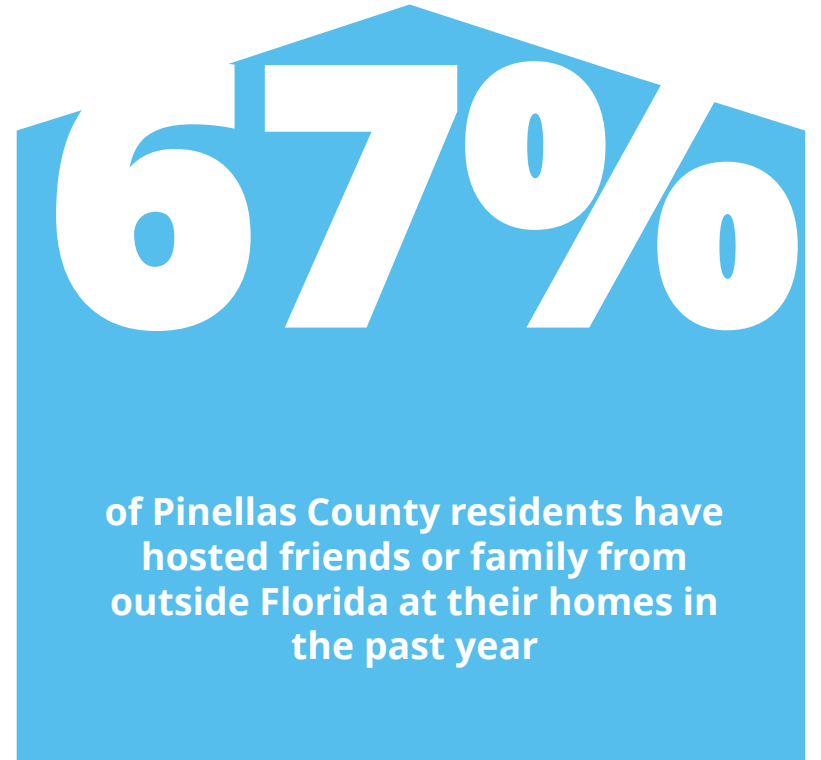


Deepen Engagement with Visiting Friends and Relatives Market

Staff indicated that VFR tourists are not being marketed to in a major capacity

Stakeholders noted that Pinellas County offers a very “a la carte” tourist experience, and that marketing to those already visiting the region could improve engagement with attractions

Secondary research tells us that even those visiting friends and relatives typically stay at local hotels, even if only for part of their stay



Increase Engagement with Locals to Raise Awareness of Tourism's Benefits



- **85%** of Pinellas County residents believe that tourism benefits everyday residents of Pinellas County
- However, **31%** have no idea how much sales tax revenue originates from out-of-town visitors
 - A further **24%** believe that less than 30% of sales tax revenue comes from visitors, and 6% believe that more than half of sales tax revenue comes from visitors
 - According to Pinellas County, approximately **one-third** of sales tax revenue derives from out-of-town visitors
- **54%** of Pinellas County residents believed that tourism increases crime in Pinellas County, although most research shows that residents are by far the largest drivers of local area crime.
- Stakeholders and staff expressed concern that Pinellas County Residents have little idea what their DMO does for their quality of life, including TDT-funded projects for cultural events and amenities

Improve Working Relationships with Local Media to Highlight The Destination's Successes



- Staff expressed a desire to engage more with local media to feature the DMO's activities
- Stakeholders and staff expressed concern that Pinellas County Residents have little idea what their DMO does for their quality of life, including TDT-funded projects for cultural events and amenities

Deepen the Level of Services Provided to Meeting Planners and Event Promoters

- Staff expressed a desire to improve engagement with meeting planners and venues
- Stakeholders expressed a desire to see more services provided especially around meetings and conventions
- Stakeholders mentioned that meeting and convention leads often overlapped with existing third-party leads which they purchase, suggesting that a differentiation of services would benefit them more

Raise Awareness of Pinellas County's Nature Preserves and Promote Ecotourism

- Stakeholders frequently cited Pinellas County's natural assets – such as the Pinellas Trail, Wheedon Island Preserve, and Ft. DeSoto – as “hidden gems”
- Secondary research shows that eco-tourism and outdoor adventure tourism is growing in popularity



Maintain Film as a Major Driver to Pinellas County and Strengthen the Benefits of Film-Induced Tourism to the Region

- Secondary research indicates that Film-Induced Tourism – the tourism spurred by viewers seeing a destination in a movie – is a powerful driver for tourists even outside of the DMO's target market
- Secondary research also demonstrates just how effective this has been for Pinellas County. In the year before the movie "Dolphin Tale" came out, annual attendance at Clearwater Marine Aquarium was 78,000. The year thereafter, it was 750,000 – nearly tenfold
- Stakeholders cited the importance of the film industry on local economic development and high-wage jobs
- Recent successes with Hallmark movies being filmed in Pinellas County provide the area with an opportunity to continue that success
- Stakeholders cited the value of county-level incentives as preserving the film work in Pinellas County; expressed a desire for a return of state-level incentives



Create and Maintain a Master Calendar of Events and Activities Across Pinellas County



- The “a la carte” tourist experience mentioned by stakeholders makes it more challenging to have a sense for what events are taking place during a visitor’s stay
- While VSPC maintains a calendar of events, they largely feature only major events and events from highly-engaged industry partners. Deeper investment would be necessary to feature more events.
- Stakeholders expressed a desire to feature “almost everything” taking place across Pinellas County
- Secondary Stakeholders expressed a wish that their typically smaller events would appear on the DMO’s website
- Staff suggested that only VSPC is in position to maintain a calendar across dozens of municipalities with hundreds of attractions.

Foster Working Relationships with Domestic and International Media to Highlight Pinellas as a Destination

- National and international news features of the destination increased during COVID – often casting the region and Florida in a negative, COVID-ignoring light
- Secondary research affirms the potency of earned media covered and proactive PR in raising awareness of a destination
- Staff expressed a desire to engage more with out-of-market media to feature the DMO's activities and to draw more attention to the destination
- Stakeholders expressed concerns that Florida Politics and statewide stereotypes could impact Pinellas County's reputation as a welcoming, diverse destination



Beachgoers take advantage of the weather as they spend time on Clearwater Beach Tuesday, March 2, in Clearwater, Fla., a popular spring break destination, west of Tampa. Colleges around the U.S. are scaling back spring break or canceling it entirely to discourage beachfront partying that could raise infection rates back on campus.

Chris O'Meara/AP

Emphasize Quality Over Quantity of Visitors in Promoting the Destination



- **81%** of Pinellas County residents feel that tourism makes traffic worse and **78%** believe that it worsens crowding and congestion in Pinellas County
- Stakeholders expressed concern that day-trip visitors from neighboring areas are contributing to litter and mischief; they worry that these visitors are lessening the experience of out-of-market visitors
- Secondary research clearly illustrates that Pinellas County is becoming a more expensive destination and that room occupancy is very high
- Secondary research suggests that the ideal visitor 'adds value to the local community, doesn't cause negative environmental impact, and drives maximum economic impact'

Encourage More Large-Scale Cultural and Sporting Events

- Secondary research affirms that large recurring events drive huge economic impacts for the host destination
 - Further, these events draw visitors from markets that may not typically be exposed to Pinellas County
- **46%** of Pinellas County residents attended a sporting event in the past year, and **73%** feel that tourism increases the variety of activities and amenities they can enjoy
- Stakeholders expressed a desire to encourage more of these major events – whether sporting, cultural, or otherwise



Study the Capacity of Pinellas' Sports Facilities and Fields to Determine Residential and Tourist Needs



- **70%** of Pinellas County residents have visited a park within the last year
- Stakeholders expressed a desire to increase sport-related tourism to the region, especially as a way to boost hotel stays in areas outside of the core tourist hotspots
- Staff expressed frustration that they lack control over existing facilities and struggle to compete with neighboring counties for business because of that fact
 - There is an open question as to whether the existing sports facilities meet residents needs as well potential sports tourism
- Secondary research shows that neighboring counties, especially Pasco, have invested heavily into sports tourism

Increase Information Sharing with Stakeholders and Community Leaders

- Resident perception study shows that Pinellas locals do not know the extent to which tourism is contributing to their community
- Stakeholders expressed a desire to see VSPC attend more government, chamber, and other functions to provide updates on their contributions to key issues within Pinellas County
- Staff expressed a strong desire to do more for their industry partners and to expand communications with industry and local governments



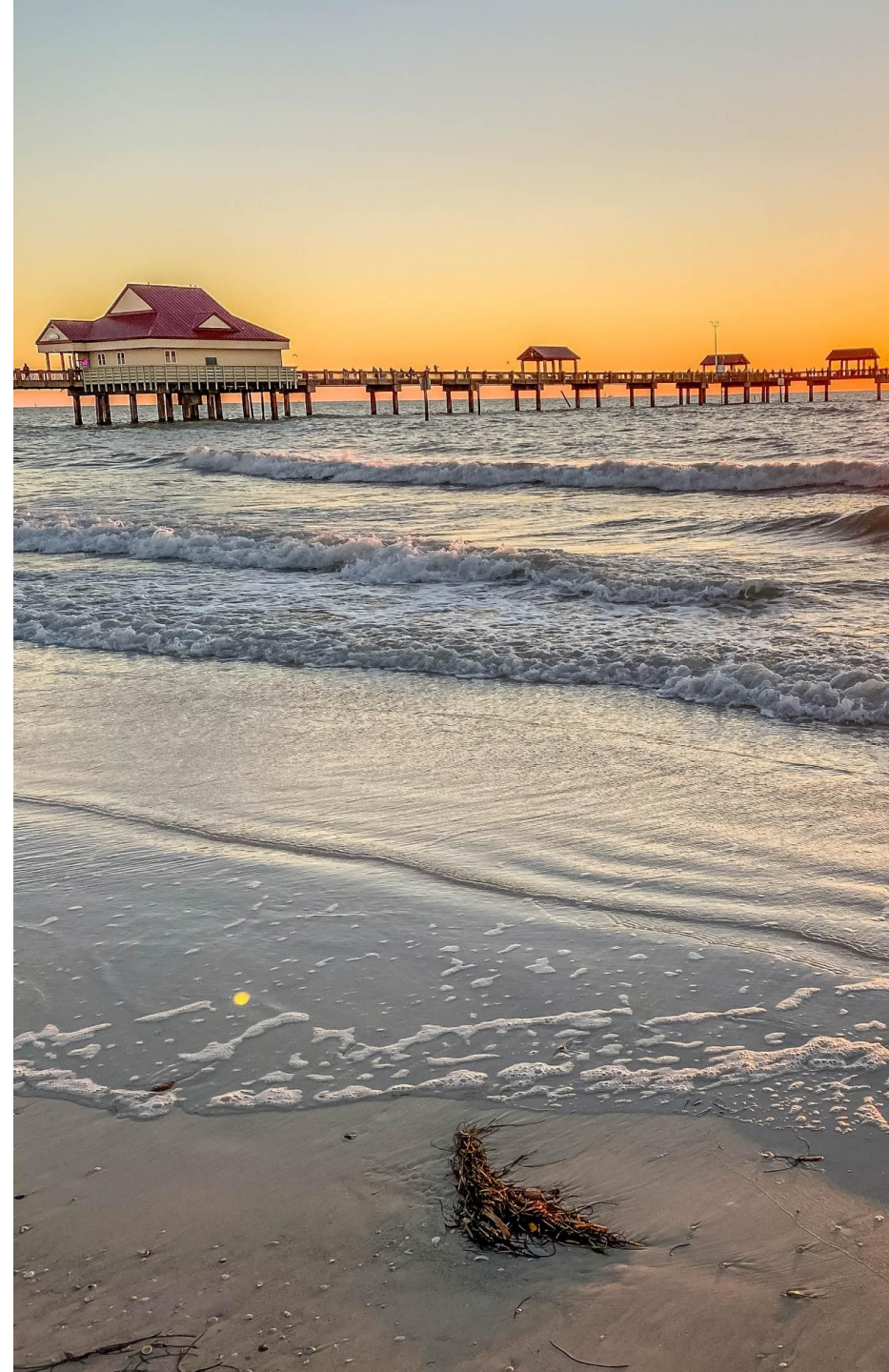
Coordinate with Municipalities and Attractions to Better Broaden the Tourist Experience

- Stakeholders expressed a desire to see more parts of Pinellas County enjoy the benefits of tourism
- Stakeholders also raised concerns that transportation and information posed challenges to enabling tourists to venture out of the vicinity of their lodging
- Stakeholders argued that visitors need something to do “once they’re tired of the beach” – and that broadening the appeal of other parts of Pinellas County would potentially increase the value per visitor



Fight for Beach Renourishment

- Secondary research highlights that the Army Corps of Engineers will not move forward with beach renourishment projects unless **100%** of the to-be-renourished areas' landowners sign away perpetual easements to their property. As of September 2021, only 223 of the 461 easements have been obtained
- Stakeholders unanimously agreed that Pinellas County's beaches are the primary driver of the destination
- Stakeholders also spoke to the other side of beach nourishment – runoff from beaches – as impacting their areas; especially in John's Pass
- Secondary research conducted by VSPC's agency affirms stakeholders' assertions that the beaches are a primary determinant of visitor interest
- **67%** of Pinellas County's residents have visited a beach within the last year



Partnership

Partnership involves VSPC providing support – whether resources, staff time, or membership – to organizations that are leading the way for causes within Pinellas County. Although VSPC may play a key role, it is not the primary responsibility.



Encourage Respect for the Environment Among Tourists and Residents

- Stakeholders raised concerns about tourists' – especially day travelers – impact on litter and other environmentally damaging practices
- However, **61%** of Pinellas County residents believe that tourism improves Pinellas County beaches
- Secondary research illustrates that litter and environmental degradation concerns are challenges for many destinations that feature natural environments and ecosystems



Coordinate Between Hotels and Cultural Attractions to Promote Events and Feature Local Artists



- Stakeholders expressed that the sheer variety of activities available to Pinellas County tourists can be overwhelming and difficult to navigate
- Stakeholders in the arts community expressed a greater desire to see local work featured in more hotels, and for hotels to be able to direct visitors more readily to current events in the community
- Staff expressed a desire to provide more innovative services to local hoteliers, of which more local art could be a part

Continue Supporting and Providing Resources to Arts and Culture in Pinellas County

- Stakeholders praised VSPC's contribution and emphasis on the arts and there was near-unanimous agreement that a strong arts and culture scene is integral to Pinellas County's Future
- **39%** of Pinellas County Residents have visited a Museum within the last year – despite the pandemic
- Stakeholders in the arts expressed a desire for more consistency of funding



Contribute to Placemaking Efforts Across the County to Highlight Different Areas' Uniqueness

- Stakeholders expressed a desire to feature more areas of Pinellas County and to make them more readily distinguishable
- **65%** of Pinellas County residents have taken a day trip to another part of the county for leisure within the past year



Commit to Partnering with Organizations to Help Keep Pinellas' Natural Environments Pristine



- **61%** of Pinellas County residents believe that tourism makes Pinellas beaches better
- **58%** of Pinellas County residents believe that tourism makes Pinellas parks and preserves better
- However, **61%** of Pinellas County residents believe that tourism contributes to **litter**
- Stakeholders expressed concerns that environmental damage from overuse of natural assets could harm one of the strongest attractions in Pinellas County – it's natural environment.

Increase Cross-Bay Partnerships in Marketing, Especially Internationally



- Stakeholders unanimously agreed that “St. Pete-Clearwater” and “Pinellas County” both suffer from low name recognition outside of the region’s traditional markets
- Stakeholders feel that the era of uncooperative cross-bay partnerships has ended; they see many opportunities for “Tampa Bay” marketing that includes Pinellas, Hillsborough, and surrounding counties
- Stakeholders believe that **international** travel and **Visit Florida Co-op** opportunities represent the best steps to boost this

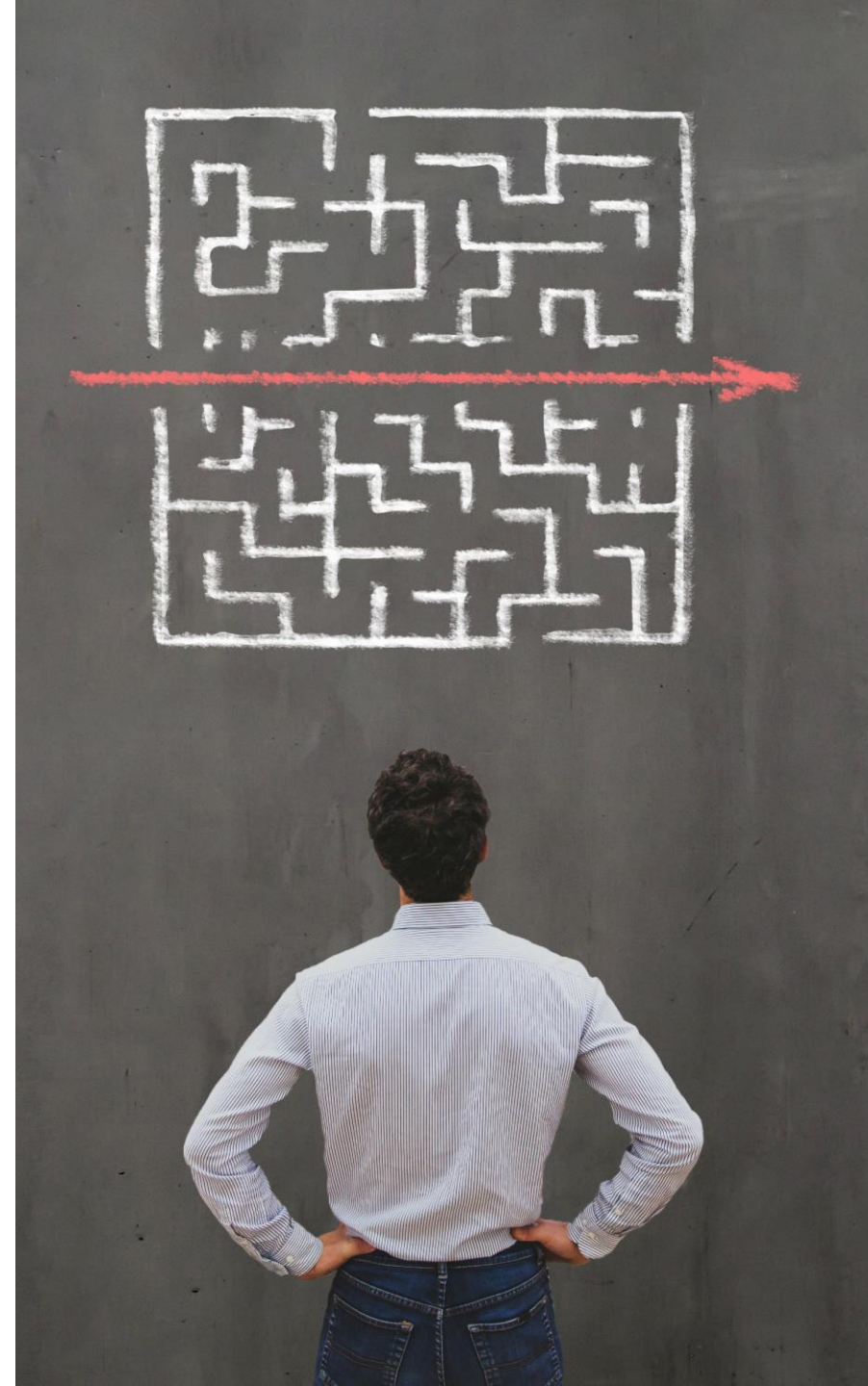
Collaborate for Increased Airline Routes to the Area to Improve Destination Access



- Stakeholders emphasized the marketing power of direct flights to the destination
- Stakeholders representing airlines suggested that more air routes to PIE and TPA would be the best way that VSPC could help them.

Work with Attractions, Hoteliers, and Transportation Providers to Simplify the Transit Experience for Pinellas Visitors

- Stakeholders expressed concerns that tourists do not explore Pinellas County and stay typically very close to their lodging
- Stakeholders praised current tourism-serving transit options and expressed a desire for more options and increased frequency
- Stakeholders suggested that greater information-sharing with tourists in-market would induce them to spend more money during their trip



Partner for Workforce Development for the Local Hospitality Sector



- Secondary research shows that Tampa Bay housing prices are rising at one of the fastest paces in the nation
- Secondary research also shows that the workforce challenges facing the hospitality sector have not abated even in 2022
- Stakeholders suggested that a lack of exposure and false stereotypes about hospitality drive away potential workers

Advocacy

Advocacy means that Visit St. Pete-Clearwater will not have direct ownership or support functions, but that the organization should speak in favor of these causes which will ultimately, indirectly help tourism in the area.



Advocate for an Increase in Meeting and Convention Space Emphasizing On-Premise Events

- Partners expressed that conventions are important for leisure business. When business travelers stay at a hotel there is a trickle-down effect for bars and restaurants.
- Staff expressed a need for flag meeting hotels with more meeting and convention space, rather than a convention center
- Many stakeholders believed that new hotel inventory with sufficient space for smaller conferences would comprise the appropriate niche for Pinellas County



Advocate for Environmental Protections Including Shoreline Resiliency, Red Tide, and More

- Stakeholders expressed concerns that Red Tide would negatively impact Pinellas County's beach reputation.
- According to secondary research, in 2018 Sarasota and surrounding counties suffered a combined \$130.6 million in physical and economic damage from Red Tide.



Advocate for Improved Transportation, Especially for Workers and Tourists

- **41%** of Pinellas County residents have a 16–30-minute commute
- **81%** of Pinellas County residents believe that tourism makes traffic worse
- Stakeholders' top objection about why a potential tourist may avoid Pinellas is transportation
- Stakeholders believe that improved transportation would raise the dollars spent by each visitor as they have more to do



Advocate for Workforce-related Issues Including Housing and Affordability

- Partners mentioned that affordable housing, such as apartment complexes, for those who work in the hospitality industry should be a priority but that it will limit hotel development
- Stakeholders noted that the sharply rising cost of staying in Pinellas County – particularly on the beach – poses a threat to the region's traditional market segment: families with children





ST.PETE
CLEARWATER

THANK YOU HCP

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