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COMMISSION AGENDA:

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Visit St. Petersburg/Clearwater

**2013 County Commission/
Tourist Development Council
Visioning Interview Top Line Findings**



Prepared for:

Pinellas County Tourist Development Council

and

Visit St. Petersburg/Clearwater

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INTERVIEW FINDINGS

The visualizations from the 16 interviews are eclectic and stimulating: boats bobbing, ferries, trollies, trails, paddlers, zip liners, and transport that runs, walks, scoots, and hums. The destination product is safe, family oriented, friendly, and authentically Pinellas. Respondents' vision is modern, aquatic, welcoming, special, intimate, and an ecologically-sound experience for our visitors. Interviewees tell us that opportunities must exist to create rainy days excursions, keep people here longer, help revitalize districts, create hubs with Wi-Fi access, and be sensual, outdoorsy, and fitness oriented. Most respondents agree some help is needed in terms of capital investment in projects that draw visitors to our area. The preservation and nourishment of our beaches is the golden egg and the priority investment. Most importantly, respondents support projects that will keep beaches pristine and nourished and utilize the causeways, waterways, and bridges for showcasing this locale.

Top priorities for bed tax dollar investments, after beaches, are supporting the existence and creation of additional amateur sports facilities and development of multiuse facilities on existing County sites. The amount of attention and interest convention business garners among the interviewees is a surprising discovery. The overall top learning from this study is that respondents want the facts and figures. They want studies and assessments that create the data they need to decide both for the tourism industry and the local economy. Respondents struggled with not having hard budget data, so we discussed their support in terms of incremental spending rather than actual dollars or percentage allocations. Respondents want to know from leadership what the long range thinking is. "What is the plan, what are the priorities that require us to think outside the box, and how does it reflect who we are?"

The respondents want TDC leadership to entertain collaborative efforts for partnerships, do everything that can be done to take advantage of important tourism opportunities, and keep skilled staff to direct the destination through the next phases of growth and all the challenges that comes with change. The TDC staff is considered a very progressive and resourceful shining star of the County.

The following world cloud represents the opportunities and issues on top of respondents' minds:



2013 Pinellas County Visioning Interviews: *Exploratory Findings*

SWOT ANALYSIS

STRENGTHS		WEAKNESSES	
<ul style="list-style-type: none"> • Beaches • Relaxed lifestyles • Weather • Proximity to Orlando • Tampa International Airport • Parks and preserves such as Weedon, Brooker Creek • Good restaurants • Gulf of Mexico • Warm water • Calm water • Visionary local leadership (Minich, Lopano, etc.) • Clean beaches, waterways, causeways, bridges • Institutes and legacy organizations • Medical, eco, sports, and wide variety of niche markets • Leadership focused on quality of life issues 	<ul style="list-style-type: none"> • White sand • Un-crowded • Service oriented tourism industry • Dedicated beach access • Capacity to hold large events on beaches • Natural beauty • Diverse cultural amenities • Variety of arts and entertainment • Sports venues • Festivals year-round • Affordable • Thriving beach communities • Activities during the day and night • Tourism jobs are on the rise • Urban Land Institute lending credibility to the redevelopment of the waterfront 	<ul style="list-style-type: none"> • Lack of clear priorities • Quality and spectrum of restaurants available • Aging properties • Aging infrastructure • Local and regional transportation • Poor attitude of some of the service industries regarding visitors • No major North County attraction • Lack adequate training for points of contact with the visitors such as hostesses and cabdrivers • Not enough capital investments and new promotions to be considered nationally competitive in 1st tier markets • No convention center • Lack of investment into heads in beds • Continuing perception of oil on Gulf beaches • Low wage tourism jobs • No evaluation tool for tax spending • Need for more branded hotels in the County to add to credibility • Lack iconic buildings and known landmarks • Being too arrogant to consider our mid-market industry's needs. 	
OPPORTUNITIES		THREATS	
<ul style="list-style-type: none"> • Aquarium attraction for non-beach activities in north county • Growth of year round sports tourism • Investment into Greenlight Pinellas • Collaborative efforts (i.e. Brand USA/Expedia/Visit Florida, Arts Council, PSTA) • Growth of arts and eco-tourism components • Development of water parks • More Gulf water activities • Training of cab drivers, hostesses, and service-industry workers to create tourism ambassadors • Create venues for growth of festivals and races • Modernize beach walkways • Enhance Gulf Boulevard's landscaping to create a "Visual Door" • Modernize Gulf Boulevard's utilities and lighting • Find investors for Tropicana Field • Increase TV exposure • Invest in historical and cultural landmarks • Waterfront transit • Waterfront entertainment • Connecting Clearwater Beach hotels to St. Petersburg downtown restaurants without a large cost to the visitor • Convention Center to hold large events • Conversion of Toy Town into a sports arena • Informing citizens of the benefits of bed tax investments 	<ul style="list-style-type: none"> • Creating more efficient transportation between amenities and airports for visitors • Tapping into the Orlando and Miami markets and getting visitors to the area • Gambling legislation • Revitalize downtown • Create a blend of national brand retailers and unique local businesses • Better promotion of locally made products • Must LUSH IT UP • Find occasions to showcase destination assets in Orlando Visitor Centers and promote our beach product • Showcase where Pinellas County locals eat, where the artisans display their goods, where the locals skate, and create connections through activities and parks • Feel like a place that is current, sophisticated, elegant, trendy, and playful • Engage visitors through opportunities for exploration and discovery of local communities, creating a more interactive County experience. • Make room for zones, hubs, and areas of activities for entertainment and culture • Educate national media on local hotspots and communities. 	<ul style="list-style-type: none"> • Losing federal beach nourishment funding • Rising sea levels • Spending too much on brick and mortar • Continual bailout of companies that should rely on ticket sales alone • Lack of support from community to change and redevelopment • Environmental threats • Close-minded leadership • Airline carriers pulling out of local airports • Growth in condos due to lack of redevelopment of hotels • Seasonal weather threats • Losing large scale meetings • Being drawn into local issues and paying for infrastructure that the TDC should not concern themselves with. • Losing sight of Pinellas County's brand identity 	<ul style="list-style-type: none"> • Losing funding for the arts • Spreading resources too thin • Not reinvesting bed tax dollars back into the CVB • Wall of hotels being built • Disney and International Drive's growth in terms of beaches and shopping • Sarasota • Naples • Economic stability • Loss of assets • Overdevelopment • Loss of the Rays • Lack of creativity to solve transit issues • Oil spill perceptions • Lack of sufficient reserves to take advantage of meaningful opportunities when they arise

2013 Pinellas County Visioning Interviews: *Exploratory Findings*

RESORT TAX INCREASE: *Support for Adding 6th Cent*

Eight respondents support adding a 6th cent of resort tax and eight respondents do not. However, these yes and no responses are “soft.” The respondents feel unformed about the bed tax and fear the potential impact of the increase on repeat visitation. Respondents do support necessary destination investments and want to use previous experiences to make sure benefits and expectations are clear.

RESORT TAX SPENDING PRIORITIES (1 = Highest Priority)

Potential Capital Expenses	Respondent																	Future Level of Funding vs. Current Allocations:		
	1	2	3	4	5	6	7	8	9	10	11	12	13	15	16	17	More	Same	None	
Beaches	1	6	1	1	1	1	1	1	1	1	1	1	1	1	1	1	14	2	0	
Amateur Sports	5	3	2	6	5	3	3	4	3	4	3	4	3	4	2	4	12	3	1	
Spring Training/ Minor Leagues	3	4	4	5	4	4	4	5	4	2	5	3	4	7	3	5	10	5	1	
Museums/ Cultural	4	7	6	3	3	6	5	2	2	3	2	6	5	6	4	3	8	5	3	
Convention Center	6	2	3	2	2	2	2	6	6	6	2	7	9	5	6	8	7	3	6	
Professional Sports	2	5	5	7	9	5	8	3	5	7	4	5	6	3	5	2	8	4	4	
Aquariums	6	1	9	4	8	7	9	7	6	5	9	2	2	2	6	8	5	0	11	
Auditoriums	6	8	7	7	7	7	6	7	6	8	7	8	8	8	6	6	0	5	11	
Coliseums	6	8	8	7	6	7	7	7	6	8	8	9	7	8	6	7	0	5	11	

- Willing to allocate more funding
 - Think amount of funding should remain the same
 - Not willing to fund this capital expenditure
- Dummied Priority Level*

CRITERIA USED TO MEASURE ROI

The majority of respondents think bed tax money should be reserved for advertising promotions, expanding into markets, and responding to visitor needs. Respondents' consensus also supports spending money on brick and mortar infrastructure as long as there is an agreed upon criteria by which to evaluate the project. Projects in which there is a partnership opportunity or documented potential to increase bed taxes are likely to garner more support. It is important to the respondents that criteria beyond just dollars are considered as well. To allow for evaluation of future opportunities, specific and visitor-driven ROI criteria must be developed.

In reference to criteria for evaluation, respondents offer the following as important considerations:

- What is the projected ROI?
- What is the impact on heads in beds?
- What is the benefit to the local area? Does it benefit locals?
- What is the value of television exposure and which markets will have coverage?
- What is the potential value of investing in sporting events, teams, or venues?
- How does the project impact existing amenities? Does it utilize existing County buildings, parks, or facilities?
- Are these dollars going directly to benefiting the visitor?
- How unique or special is the investment opportunity?
- Does the investment enhance the product or brand? If so, to what extent?
- Can the destination benefit further by partnering?
- Is the opportunity energy efficient?
- Does it unite the County (culturally, historically, and/or transit)?
- Does it add to the experiential factor for our visitors?
- Does it reach new markets?
- Does it comfort or amuse our visitors?
- Does it keep them coming back?
- Can the County bring a certain amount of investment power to the negotiation table?
- Can we better hold recipients of bed tax dollars accountable for monies at risk?
- Is the investment somewhat resistant to economic dips?
- What is the impact on water, wastewater, public education, the workforce, transportation, etc.?
- Can we multiply the impact of our spending by combining or consolidating the cities' promotional efforts?
- Does the investment make our destination more compelling to a visitor?
- Does it add to our credibility as a destination?
- Does it link the County together and connect the venues?
- What communities benefit from the project?
- Do we believe in the project?