

Sarasota County

Destination Strategic Plan 2025





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Section 1:

Executive Summary



Visit Sarasota County (VSC) recognizes that the future of Sarasota County depends on having an innovative strategic plan shaped by visitor research, analysis and thoughtful consideration of input from stakeholders and partners across the county.

To accomplish this work, VSC partnered with JLL's Tourism practice, an international tourism and destinations consulting group, to assemble a comprehensive destination plan that would build off the efforts and accomplishments since the organization's 2020 strategic planning initiative and identified goals.

Specifically, by 2025, VSC seeks to:

- **Ensure funding and program development are aligned among VSC, its partners, government entities, non-profits and meets long-term goals of the community**
- **Assess gaps in the tourism, sports, cultural infrastructure to identify potential new or enhanced tourism demand generators.**
- **Recommend actions and activities to increase visitor flow across all segments (leisure, meetings, sports).**
- **Review the effectiveness of VSC's marketing programs and recommendations to improve these initiatives. Examine VSC impact compared to its direct competitors with their much larger budgets.**
- **Most importantly, work to achieve \$30 million in annual Tourism Development Tax (TDT) collections to potentially invoke an increase to the TDT to support promotion and destination development priorities.**



The plan's build out incorporated broad-based stakeholder engagement, market research to compare Sarasota County to peers, a process to inventory current destination assets, and assessments of current practices and initiatives. Together, these created an understanding of the area's current tourism state in promoting and hosting visitors. JLL used this understanding to identify areas of highest and best use for the existing and planned assets and developed recommendations for VSC and its destination partners.



Research and analysis

Understand the current
state of the market



Stakeholder Engagement

Involve destination
partners to create a realistic
approach with buy-in



Assessment of tourism product, assets

Understand the strengths and
opportunities for the area



Comparisons and benchmarking against other destinations

Identify differentiators to
help market the area

The sections that follow outline priorities and recommendations VSC can use to accomplish the above. Together, they provide a roadmap for VSC and the communities it represents to strengthen the tourism product in the region and increase visitation.

The Destination Strategic Plan 2025:

- Calls on VSC and its partners to take a new approach to leverage the brand and draw of the beaches, while supporting investment in the area's other attractions to make them more visitor facing as well as touting their appeal to all visitor types
- Sets priorities for resource allocation
- Identifies short- and medium-term strategies and tactics around which all of the destination partners should be aligned to ensure demand is increased and new hotel inventory is absorbed
- Positions the tourism industry as the lead driver for overnight visitation, as well as an integral part of community development and strengthening the area's "quality of place"
- Suggests organizational changes and new and enhanced collaborations to solidify the industry's relevancy as a critical component of the overall regional economy





Section 2:

Background

STAKEHOLDER ENGAGEMENT

Purpose:

Develop a Destination Strategic Plan capable of guiding Sarasota County's destination development, tourism business growth and overall community support for the visitor economy through 2025.

The future of both VSC and the destination it serves depends on having an innovative strategic plan shaped from research analysis and thoughtful consideration of input garnered from numerous conversations across the county. The buildout of this Destination Strategic Plan 2025 would depend on the following steps:



To accomplish this work, VSC partnered with JLL to assemble a comprehensive destination plan that would build off the efforts and accomplishments since the organization's 2020 strategic planning initiative. The document that follows is the outcome of a nine-month process to interpret the needed inputs into a usable format that could guide future destination development and sales and marketing efforts.

Interviews & Discussions

The input across Sarasota County included the following:



75 different meetings or interviews spanning each municipality (Sarasota County, City of North Port, City of Sarasota, City of Venice, and the Town of Longboat Key) and including a vast array of stakeholder types:

- Accommodations
- Arts and Culture
- Attractions
- Civic leaders
- Conservationists
- Economic developers
- Elected Officials
- Event planners
- Labor & Employment
- Municipal Administrators
- Outfitters
- Real Estate Developers
- Researchers
- Residents
- Retailers
- Sports
- Transportation
- Venues
- Mobility



9 different topical focus groups:

- Arts & Cultural Organizations
- Downtown Sarasota hotel owners and operators
- Chambers of Commerce & Economic Development Organizations & Argus
- Outfitters and Outdoor Recreation Suppliers
- Sarasota Bradenton Hotel Committee
- Sarasota County Tourist Development Council
- Sports planners and sports venue operators
- Vacation Rental owners and operator groups
- VSC Board of Directors and Staff
- The Bay representatives
- Neighborhood Organizations



Additionally, five meetings were held to review input and direction with an appointed Steering Work Group, selected specifically to help guide the project. The members included the following individuals:

- Andrea Knies, Arts & Cultural Alliance of Sarasota County
- Lorrie Liang, Sarasota Memorial Hospital
- Adam Mott, Siesta Key Luxury Rental Properties
- Sondra Guffey, West Villages Florida
- Lisa Damschroder, Sarasota County Parks, Preserves and Recreation and Natural Resources
- Nicole Rissler, Sarasota County Parks, Recreation and Natural Resources
- Jeff Mayers, The Resort at Longboat Key Club
- Erin Silk, Venice MainStreet
- Danielle Walls, The Ritz Carlton, Sarasota
- Vicki Oldham, Newtown Alive

More than 425 individuals provided input to help guide this plan. A stakeholder survey was developed and distributed to elected officials, municipal leadership, industry stakeholders and businesses to gather as much additional input as possible. More than 340 survey responses were received and analyzed in this effort.

Prior Planning

Visit Sarasota County developed its previous Strategic Plan over the course of 2012-2013 with input from 175 community, government and tourism industry participants. The four primary goals of the Strategic Plan were adopted by both the Visit Sarasota County Board of Directors and the Sarasota County Board of County Commissioners.

Goal 1 – Continue to develop and communicate the destination’s brand essence

Goal 2 – Advocate for Destination Enhancing Development

Goal 3 – Elevate the Visitor Experience through enhanced visitor services

Goal 4 – Increase investment into tourism promotion and development

These goals provided a demonstrable foundation for determining destination and organizational effectiveness. Included below are the goals, recommendations and actions taken from the last planning effort. Visit Sarasota County has worked on all aspects of this effort leading into the 2025 plan. The results are listed in the appendix of this report.



Additionally, Visit Sarasota County completed a Destination Next assessment in 2016. The outcome of the community input scored below average in Destination Strength and above average in Community Support and Engagement. The following items were listed as destination related opportunities for improvement:

- Mobility and Access
- Air Access
- Convention & Meeting Facilities
- Wi-Fi
- High-tech and Innovative
- High quality shopping
- Appealing to diverse groups
- Large headquarter hotels

These issues would help guide the direction of the 2018 planning process. The VSC Board of Directors listed four key goals for the 2025 Strategic Plan.

- Ensure funding and program development are aligned among VSC, its partners, government entities, non-profits and meet long-term goals of the community.
- Identify and assess gaps in the tourism, sports, cultural infrastructure to include identification of potential new or enhanced tourism demand generators and strategies to enhance attractions, events or assets to drive demand.
- Recommend actions and activities to increase visitor flow across all segments (leisure, meetings, sports).
- Assessment of the effectiveness of VSC's marketing programs and recommendations to improve these initiatives. Examine VSC impact compared to its direct competitors with their much larger budgets.







Section 3:

State of Sarasota County Tourism

Purpose:

Capture a perspective of the Sarasota County tourism economy in 2018 and project its future performance and contribution to the region.

Statewide Perspective

On September 14, 2018, the Florida Legislature Office of Economic and Demographic Research presented a report entitled **Florida: Long-Range Financial Outlook**. Several findings had direct applicability to the Destination Strategic Plan of Sarasota County including:

- Population growth is the state's primary engine of economic growth, fueling both employment and income growth.
- Despite the strong percentage growth rates in residential building permits over five of the last six calendar years, the level is still low by historic standards – about half of the long-run per capita level.
- Statewide unemployment at 3.7% was below the “full employment” rate of 4%.
- The Florida accommodations and food services employment sector has the lowest average annual wage yet, with the exception of 2017, has been growing faster than overall employment in the state.
- Florida's tourism industry welcomed a record 120.5 million visitors in Fiscal Year 2017-18, an increase of 5.5% over FY 2016-17.
- Florida growth rates are generally returning to more typical levels and continue to show progress. The drags—particularly construction—are more persistent than past events, but the strength in tourism is compensating for this.
- Tourism contributes 12.9% of the overall sales tax revenue for the state of Florida.
- Currently, tourism-related revenue losses pose the greatest potential risk to the economic outlook of the state.

Sarasota County Perspective

Growth

Lakewood Ranch, the second fastest growing planned community in the United States in mid-2018, plans to build 5,000 homes in Sarasota County¹.

West Villages in North Port incorporates a 15,000-acre development approved for 33,000 units making it the fifth-fastest growing master planned community in the nation. Just under 4,000 homes have been sold and roughly 1,000 more are under construction¹.

Employment in the construction trade increase by 4% in 2017 over the previous year bringing the total level of construction employment to 13,000. Most construction has been residential but major commercial development has focused primarily on tourism assets including hotels, attractions and a major sports venue¹.

Population growth in Sarasota County is projected to reach more than 417,000 individuals in 2018 a growth of 10% between 2010 and 2017 and a doubling of the 1980 population figure².

Sarasota was the 23rd fastest growing county in Florida since 2010 and the 16th fastest growing among the 26 Florida counties with a population of greater than 250,000. This growth in residents is not a result of new births as the birth rate in Sarasota County is about half of what the death rate is. The change comes from in-migration by new residents. Migration from nearby counties is roughly split with tourism induced new residents, each contributing to around 50% of the new people moving into the area. Tourism induced in-migration is a vital part of the Sarasota residential life cycle and economy. The discretionary income and educational level of these individuals pre-qualifies them as a likely donors and supporters of the arts. The Visitor Flow section of this strategic plan outlines a cycle that can guide the future pursuit of this most valuable populace. Additionally, this group is aligned with their family and friends to provide a valuable connector to future talent recruitment efforts of the Sarasota County Economic Development Corporation to address the burgeoning need for recruitment and retention of younger talent to the area.

¹Lynn Waddell, "Key Economic Sectors in Sarasota County", www.floridatrend.com, August 30, 2018.

²Florida Legislature Office of Economic and Demographic Research, "Sarasota County: Florida's 14th most populous county with 2% of Florida's population," December 2018.

Sources of growth

- Manatee County, FL
- Charlotte County, FL
- Other Florida Counties
- Europe
- North America
- Summit County, OH (Akron area)
- Cook County, IL (Chicago area)
- Buncombe County, NC (Asheville area)
- Queens, NY
- Ada County, ID (Boise area)

Demographics of growth

- Younger families are coming from other areas of Florida
- Semi or full time retirees are moving from out of state
- Semi or full time retirees are moving from abroad
- Less than half of Sarasota County's population 16+ is in the workforce

Importance of Sarasota County's tourism industry extends beyond its impact on driving new population growth. Sarasota County produces:

- 2.7 million visitors in FY2018
 - Spending \$1.82 billion directly
 - \$3 billion in (total) economic impact
- \$232 million in taxes
 - Saving \$656 annually for each Sarasota County household

A growing Sarasota County must consider and plan for a growing tourism economy.

Comparatives

Sarasota County has clear comparative and competitive benchmarks with other Florida destinations. Although Dade County, Broward County, Palm Beach County and Pinellas County are all substantially larger in population and tourism industry size, this group plays an important role in understanding dynamic shifts in the tourism industry. The close grouping of Lee County, Manatee County and Collier County provides an accurate Gulf Coast comparison and match well with Sarasota County product offerings. Potential Atlantic Coast and Northwest Florida destinations have mild comparatives in size and visitor volume to Sarasota County but very different dynamics with out-of-state drive times, seasonality, cruise line impacts and location to large military installations. The comparatives of each of these destinations is included on the following chart.

SARASOTA COUNTY COMPARATIVES				
	Sarasota County	Collier County	Lee County	Manatee County
Population	419,119	372,880	739,224	385,571
Population Growth	10.31%	15.59%	19.14%	19.21%
Total Number of Visitors 2017	2,701,600	1,774,800	4,797,394	3,160,700
Change in Number of Visitors over 2016	9.6%	-1.1%***	-0.2%	2.0%
Number of Hotel Rooms 2017	7,171			
Room Nights Generated 2017	2,663,590	2,364,300	2,958,106	
Change in Room Nights Generated over 2016	3.0%	-2.7%	1.8%	
Lodging Occupancy 2017	73.0%	67.6%	72.1%	72.9%
Average Daily Rate 2017	\$180	\$220.39	\$157.96	\$174.10
RevPAR 2017	113.34	\$148.97	\$113.93	
Sports Events Hosted 2017	152	36	144	
Sports Room Nights 2017*	97,761	14,685	150,000	
Sports Direct Impact 2017*	\$194,505,533	\$14,899,178	\$65,891,470	
Media Impressions* *	637,000,000	334,657,636	742,000,000	
Advertising Value of Media		\$11,853,501	\$2,000,000	
Direct Visitor Spending 2017	\$1.717 billion	\$1.38 billion	\$3.09 billion	\$789 million
Total Economic Impact 2017	\$2.834 billion	\$2.05 billion		\$1.25 billion
Change in Economic Impact over 2016	6.5%	3.4%	1.6%	5.5%
Tax Savings per Household 2017	\$640	\$992	\$1,944	\$365
Tourism Jobs 2017	32,800	38,000	41,977	26,600
TDT Revenue 2017	\$21.3 million	\$22.5 million	\$42.1 million	\$13.7 million
TDT Rate	5%	5%	5%	5%
Average Visitor Age	54	48.3	52	49
Average Household Income of Visitors	\$124,800	\$157,000	\$102,400	\$116,873

Sources: Naples | Marco Island | Everglades CVB, The State of Tourism 2017-18,

Sources: The Beaches of Fort Myers & Sanibel, 2017 Annual Visitor Profile & Occupancy Analysis, TDT Collection by Fiscal Year, TDC Report to Industry Feb 2018

Sources: Manatee County Tourist Development Council February 2018 Packet, April 2018 Packet

*Not including World Rowing Championships

**Siesta Beach named #1 beach by Trip Advisor

***Hurricane Irma

Visitor Research

Visit Sarasota County regularly conducts a wide range of visitor studies and performance-based monitoring of the area's tourism economy. This library of research-based resources was thoroughly reviewed, summarized and applied throughout this planning process. Key visitor research highlights from VSC's research firm Downs & St. Germain include:

- FY 2018 saw 2.7 million visitors
 - 1.2 million stayed in paid accommodations – 44% of all visitors
 - 789,120 stayed with friends and relatives
 - 688,060 were day trippers
- Visitor appeal
 - Beaches
 - Family vacation
 - Scenic beauty
 - Place to unwind

Potential visitors validated their perception of important attributes in a 2018 Gap Analysis where the three most important attributes are also the ones where they rated Sarasota the highest, beautiful beaches, place to unwind and scenic beauty.

Visitors are drawn to Sarasota predominantly for the beaches as they seek a family vacation offering “Scenic beauty” and a “Place to unwind”. Potential visitors have a different perspective of the Sarasota area's overall attractiveness than the local stakeholders. Local Stakeholders understand the dramatic role the beaches play in driving demand but rank Arts & Culture ahead of beaches as an overall strength of the area.





Stakeholder Research

A specific Sarasota County stakeholder survey was conducted by JLL to determine stakeholder perceptions of the area's tourism activity and overall destination economy. Overall 342 individuals responded to the Stakeholder Survey. Key take-aways included:

- Stakeholders agree with visitors that the current demand driver is the beaches with over 95% of stakeholders ranking them as the number one demand driver
- However, stakeholders ranked the county's arts and cultural scene as the top strength of the destination – above the beaches
- Stakeholders were asked about future investment priorities for the tourism industry and the top responses were:
 - Transportation Infrastructure
 - Arts and cultural offerings/venues
 - Increased air access
- When it comes to the cornerstones of VSC's marketing programs (Culture, Nature, Sports and Meetings) stakeholders rated Sarasota County with
 - 4 out of 5 stars for cultural amenities
 - 4 out of 5 stars for nature offerings
 - 3.5 out of 5 stars for sports facilities and amenities
 - Meetings and conferences ranked as an important aspect, but the lack of large facilities was an issue to stakeholders
 - Downs and St. Germaine Research validates the importance of each of these market segments for Sarasota County.

Chart: Unique Visitors Staying in Paid Lodging	Sports Participation by Visitors	Cultural Participation by Visitors	Nature Participation by Visitors	Sports Direct Spend by Visitors	Cultural Direct Spend by Visitors	Nature Direct Spend by Visitors
2015	478,400	420,600	573,200	\$336,001,000	\$295,421,100	\$402,551,900
2017	726,700	453,900	765,200	\$492,050,700	\$307,303,000	\$512,171,700
Stakeholder Perception	3.5 out of 5	4.0 out of 5	4.0 out of 5			
% growth	51.9%	7.9%	33.5%	46.4%	4.0%	27.2%



Challenges

Awareness

Despite the volume of growth in tourism to Sarasota County, caution signs are potentially looming in the distance. Overall destination awareness as a Southeast beach destination is limited at 2%, the same level as other Florida destinations including Daytona and Naples. The image is more concerning when specifically compared amongst Florida competitors. Building marketing outreach and image is the most effective mechanism for overcoming perceptual and awareness levels.

Perceptions of the impact of tourism also pose a potential threat on support for tourism marketing investments as growth in the area's hotel supply has created an artificial perception that the industry will continue its pace of growth. Through 2018 funding growth for marketing has been growing at a rate similar to industry performance but capital funding commitments (as displayed in the Funding Implications section) have reached a point of erosion. This will limit the overall ability of VSC to continue efforts to generate awareness among both existing and new target points of origin. Lack of awareness is the number one reason given for not visiting Sarasota County.

Hotel Supply

Sarasota's lodging inventory supply grew by nearly 8% in 2018, yet demand was only increasing by 1.4%. Of the comparative set of destinations, only Pinellas County (2.7%) had a supply rate growth higher than 2.5% according to STR data. Additional properties are planned to open in 2019 and more in the pipeline.

Lodging occupancy is a key indicator of future success in tourism. October 2018 year-to-date occupancy figures were down 5.8% over 2017. Although this figure is alarming, other factors need to be considered before declaring Sarasota County supply growth as the sole contributor to occupancy woes. Two other critical factors should be considered:

- October 2017 YTD occupancy figures included significant contributions from hosted sporting events, most notably the World Rowing Championships. These events were so vital to the area's economy that normal impacts from a direct hurricane strike were not felt in Sarasota County.
- October 2018 YTD included four months of impact from Red Tide producing intensely lower interest in beach related visits between July and October.

Current Industry Myths

Growth in Sarasota County tourism fosters a few misperceptions that need to be addressed as part of the Destination Strategic Plan:

MYTH 1:

Developers were responsible for over-building the Sarasota County hotel inventory, let them figure out how to sustain it.

Despite the infusion of new and renovated hotel products in Sarasota, Lakewood Ranch and Venice, the area continues to have targeted hotel development (particularly in North Port) and renovation (addressing quality and modernizing along beachfronts and within the airport corridor) needs. The hotel building boom in downtown Sarasota, with new high-quality hotels with meeting space, is strategically planned and crucial for achieving density and critical mass levels. This development is the kind that can attract high-quality visitors with discretionary spending capacity. This development phase has reached the point where historic demand growth will be unable to keep up with supply growth. New demand growth must be created, or rates will begin to cause tourism revenues to wane. The Sarasota County hotel inventory is not over-built, but it will be viewed that way if marketing efforts and other demand drivers cannot grow and develop.

MYTH 2:

Tourism-driven out-of-town property ownership is causing a drastic affordable housing problem.

In 2017, 2,038 properties were sold to out-of-state (non-homesteaders) owners. These properties on average have a sale value of \$280,000. The median sales price for single family homes in 2015 was \$220,000, the highest point since the 2008 recession. Area median income in 2017 was \$57,300, the lowest level since the Great Recession. A key contributor in locales with affordable housing problems is the type of housing being developed. Since 2012 over 90% of the residential building permits in Sarasota County have been issued for detached single family homes. Challenges with affordable housing follow high demand locations, but tourism is not the sole driving factor in real estate rates.

MYTH 3:

Sarasota County is at risk of being “over-tourismed”.

Transportation congestion, wait times for seats in restaurants, parking challenges at area beaches are all symptoms of over-tourism. Sarasota County clearly has some of these issues, but primarily during certain times of the year. January through March are periods of intense visitor, seasonal resident and homesteader interaction and the dramatic impacts cause year-long perceptions. Population growth to the area has doubled since 1980 and tourism plays a factor in population growth as visitor exposure contributes to almost 50% of the overall in-migration. Supply growth in recent years has outpaced demand and places additional pressure on production. Over-tourism is not a factor of major concern for the future, but seasonality is. In a 2017 study, local residents were more likely to perceive positive rather than negative impacts of tourism and those local residents surveyed believe tourism brings more money to the economy and helps reduce taxes for locals.

WHY A DESTINATION STRATEGIC PLAN (DSP)

All of this leads to why create the next Destination Strategic Plan? Sarasota County has significant strengths as a destination, but the community faces challenges that can and will affect the **community's economy**. The elements of this DSP will surface key priorities and make recommendations for how the destination can successfully evolve for the future of the tourism industry in Sarasota County.

ATTRACTORS & ATTRACTIONS

Recommendation:

Develop a product development system to help assets (venues, parks, attractions and events, etc.) adopt practices, investments and plans to prosper as both attractions and attractors.

Background:

Beyond the powerful lure of the beaches, the attractions of Sarasota County have largely served the role of helping visitors pass the time on vacations and trips. VSC has actively tried to profile the allure of non-beach assets as “and Beyond” to show the diversity and quantity of outdoor recreation, cultural and sports related offerings in the area. These efforts provide a solid foundation for improvement to both marketing outreach and to overall product development.

Definitions:

To understand the future role of these activity centers, it is important to establish a clear definition that differentiates venue status in driving visitor engagement.

Attractors

Attractors are attractions that offer unique and distinctively compelling visitor engagement that provide the inspiration for the visit. Attractors can be utilized to build visitation during need periods. In a beach destination like Sarasota County, attractors often provide the catalyst for off-season travel. Events, exhibitions, tournaments and performances are key components of attractors that with regular planning can provide the determining factor for a trip to the destination, even if not the primary purpose of the trip.

Attractions

Venues, parks, attractions and events that do not play a major role in providing the determining factor in a visit are called attractions. These sites provide entertainment options that add to the visit versus being a key consideration in the trip decision.



STRATEGIC DIRECTION

Classify determining factors for each primary attraction that could be tapped as a possible attractor opportunity.

- Cultural & Educational Attractions (museums, science centers, gardens, aquariums, zoos and heritage-based venues)
- Entertainment Attractions & Tours (Vibrant entertainment zones, parks and guided tours)
- Parks & Outdoors (state parks, regional & local parks and outdoor recreation experiences)
- Shopping (retail districts, stand-alone special stores and shopping centers)
- Sports (spectator sports, tournaments, participatory sports, fishing, boating, golf)
- Wellness (spas, fitness, holistic healing, medical services)
- Performances (performing artists with a specific following and fanbase)
- Events (festivals and fairs not tied to a previous mentioned venue)
- Dining, beverages & nightlife (restaurants, food trucks, craft beverages and night life options)

Determining Factors for Attractors

Attractors and attractions can be plotted along a scale of compelling uniqueness and across seven key attributes. Attractors will rank highly on the scale, while attractions will be lower. The individual attributes will indicate strengths within attractions that act in a similar manner as attractors but are not singularly compelling enough to achieve the desired attractor level. Attractors must score a six or higher. Below a six, the attraction is no longer a driver for a visit. The attributes are as follows:

Iconic Design – The aesthetics of the attraction are dramatic prompting a curiosity tug powerful enough to inspire a visit - nationally or internationally recognizable.

One-of-a-kind Offering – The content or collections of the attraction captivate audiences and drive interest and appeal. Proximity of alternative similar offerings must be far enough away to be considered one-of-a-kind, this likely means out-of-state.

Event Opportunities – The attraction programs temporal special events providing a true catalyst for a visit.

Engaging Visitor Experience – The interaction between the guest and the attraction is intense and engaging producing tremendous rapport and satisfaction. Similar to being a *one-of-a-kind offering* the engaging experience must not compete with another similar experience within the state.

Venue Capabilities – The attraction can be easily transformed and adapted for hosting various functions such as receptions, weddings and business meetings or for providing intriguing services including food, beverages or retail.

Specific Target Audience – Specialized audiences can be targeted based on their overall connectivity to the attraction. Certain attractions have such a strong following with their targets that they can function as an attractor.

Future Unique Development – Upcoming additions, plans or development initiatives that could elevate the attractiveness and potential of the destination.

When the seven attributes are averaged they produce an overall composite compelling uniqueness rating that can be posted to a scale of attractiveness to prospective visitors. Attractions fall in the lower half of the scale (ratings of 5 or below) and attractors fall in the upper half of the scale. Only the truly most uniquely compelling destinations should receive a rating of a nine or ten.

Attraction & Attractor Level	Largely Local Attraction	Fairly Connected Attraction	Most Connected Attraction	Attractor	Very Compelling Attractor	Most Compelling Attractor
Level of Interest	Little to no interest for a visitor	Interesting to do on a repeat visit	Must see if in the area, but not the reason for the trip	Targeted regional interest and draw	National Interest and draw	Worldwide interest and draw
Example	Family plot in hometown cemetery	Historical marker honoring regional hero	Mark Twain gravesite	Interesting Cemetery Tour	Tomb of the Unknown Soldier	Great Pyramid of Giza
Rating	1	2-3	4-5	6-7	8-9	10

Attractions/Attractors Scale Example

Classifying attractions and attractors is not an exercise to determine overall importance or value to a community, but rather to understand where the site fits, or can fit in the future, within destination development efforts. In the case of Sarasota County, attractors need to play an important role in motivating travel during off season times of the year. An attraction can be a vital community asset, particularly in its ability to connect to residents and visitors seeking a diversion such as a bike path, but the strength of the asset to truly inspire a visit from an out of town guest is pivotal to be an attractor. Knowing a site's attractor strengths and weaknesses can aid in creating more compelling promotional messaging and planning future development or programming direction.

The following examples highlight how key Sarasota County assets to provide a clear understanding of their attractor rating and opportunities associated with moving up the scale in the future.

SAMPLE ATTRACTOR POINT SCALE								
Site	Iconic Design	One-of-a-kind Offering	Event Opportunities	Engaging Visitor Experience	Venue Capabilities	Specific Target Audience	Future Unique Development	Overall Attractor Number
Points Available	10	10	10	10	10	10	10	10
The Ringling	7	8	8	7	7	6	6	7.0

Distinguishing Notes: Although the Museum of Art is one of 474 different art museums listed on VisitFlorida.com, the collection is one of the most influential in the state. The Circus Museum is one of the top three in the nation, especially the Howard Bros. Circus Model. The terra-cotta green walls of the Center for Asian Art are distinctive.

Options moving forward: The closing of the Ringling Brothers, Barnum and Bailey Circus in 2017 will likely bring long-lasting impacts on the overall appeal of the Circus Museum, but the overall diversification of The Ringling allows this complex to maintain a prominent role as a key attractor for Sarasota County.

Marie Selby Botanical Gardens	5	6	8	7	7	6	8	6.7
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Distinguishing Notes: An example of eclectic Southern Colonial architecture. Orchid and gesneriads displays are dramatic. One of 28 different Botanical Gardens listed on VisitFlorida.com. Second largest Spirit Collection and most comprehensive collection of living epiphytes in the world. Certain higher profile exhibitions are available to other gardens as traveling exhibitions. Ann Goldstein Children's Rainforest provides escapism for children. Flower and garden visitors can be targeted. Capital campaign plan underway for Living Buildings, new welcome center and learning center.

Options moving forward: The master plan proposed for the future of Selby Gardens provides a campus that is fully capable of providing an attractor atmosphere. The investment will encourage both scientific visits and hobbyists to pursue a Sarasota visit, but depends on targeted marketing to drive awareness of the offerings, particularly the orchid and epiphyte collections. Once exposed to the facility, events will be a catalyst for sparking future visits among this target audience.



STRATEGIC DIRECTION

- It is recommended that VSC work with attractions across the county to complete this analysis with each attraction during implementation of this plan.
- A table to complete this exercise is included in the appendix.

True family time + relaxing/recreation + learning/enrichment

Visit Sarasota County currently builds on the distinctiveness of the area's pristine beaches with the banner Beaches and Beyond^(R). Moving forward, the opportunity exists to hone the message further by centering on the unique family bonding made capable through active learning and recreation. The assets of Sarasota County provide a dynamic outlet for time together. The beaches remain as the primary magnet for creating awareness and driving interest, but growing more solid attractors will enable the destination to more efficiently compel First Time Visitors and Sporadic Repeat Visitors that need encouragement beyond a relaxing beach vacation to select Sarasota County. It will also support targeting certain travelers who may be enticed by other assets as an additional activity.



KEY OPPORTUNITY:

The absence of significant commercial attractions provides a level of authentic and genuine family interaction through various visitor activities.



Section 4:

Destination Strategic Plan Priorities + Recommendations

New & Repeat Visitors

Recommendation:

Develop specific strategies and approaches targeting potential visitors based on messaging that is directly tied to key motivators for travel to Sarasota County.

Past efforts targeted visitors based on niche areas of interest such as arts and culture, outdoors and nature etc

These targeted visitors can be categorized into the following types:



Day Trippers (0 nights)

Typical Vacationer is 56 years old, 36% traveling with children, 92% drove to Sarasota arriving from the Southeast (76%) visiting to relax and unwind (49%) and having a median household income of \$71,100.



Vacationers (1-10 nights)

Typical Vacationer is 51 years old, 43% traveling with children, 74% drove to Sarasota arriving from the Southeast (32%), Northeast (31%), Midwest (21%) and International (21%) visiting to relax and unwind (67%) or visit friends and relatives (46%) and having a median household income of \$118,800.



Long-term Visitor (Greater than 10 nights)

Typical Long-Term Visitor is 60 years old, 85% did not travel with children, 72% drove to Sarasota arriving from the Northeast (38%), International (33%) and Midwest (16%) visiting to relax and unwind (83%) or visit friends and relatives (37%) spending 44 nights and having a median household income of \$133,300.



STRATEGIC DIRECTION

Reclassify traveler targets for Sarasota into three separate groups:

- New Visitors (most expensive to acquire, needs inspiration to travel)
- Sporadic Repeat Visitors (keep Sarasota County in vacation consideration)
- Frequent Repeat Visitors (become Sarasota Ambassadors)

Prioritize targeting to each group based on length of stay, focusing most prominently on Vacationers (1-10 nights).

New Visitors

- Focus investments on the conversion of New Visitors.
- New Visitors stimulate future business, try different attractions, drive non-peak season travel.
- New Visitor points of origin should be prioritized based on potential likelihood to travel, geographic and lifestyle segmentation.
- Messaging should be centered on the beaches as the primary motivator and relaxation as the emotional context.
- Participatory sports, conferences and business meetings offer additional opportunities to attract New Visitors

Reasons for visiting	First Visit	6+ Visits
Relax and unwind	52%	70%*
Visiting friends/relatives	22%	56%*
Nature, environment, bird watching, etc.	23%	28%
Shopping	17%	20%
Family vacation	21%	16%
Fishing, golfing, hunting, etc.	9%	12%
Special occasion	13%	10%
Culture (e.g., performing arts)	4%	7%
Attractions	14%	6%*
Biking, hiking, etc.	8%	5%
Business conference or meeting	14%	4%*
Attend or participate in a sporting event	7%	4%
Museums, history, etc.	6%	3%
Other	12%	10%

**Significant changes.*

Sporadic Repeat Visitors

- Highlight reminders of the beauty and memories to encourage Sporadic Repeat Visitors.
- Engage Sporadic Repeat Visitors to expand their integration across activities
- Deliver high impact visitor satisfaction to encourage transition of these visitors into Frequent Repeat Visitors.
- Encourage Sporadic Repeat Visitor to opt-in to ongoing communication.





Activities while visiting	First Visit	6+ Visits
Relax and unwind	64%	76%*
Visit friends and relatives	27%	63%*
Beach	65%	56%*
Restaurants	58%	52%
Nature, environment, bird watching, etc.	33%	38%
Shopping	33%	35%
Family time, reading, cooking, etc.	16%	26%*
Fishing, hunting, etc.	14%	16%
Water sports (boating, kayaking, jet skiing, etc.)	15%	15%
Special event	9%	11%
Golf or tennis	6%	11%
Bars, nightclubs	16%	9%*
Attractions	18%	9%*
Culture (performing arts, etc.)	4%	8%
Biking, hiking, etc.	9%	7%
Attend or participate in a sporting event	6%	6%
Museums, history, etc.	6%	5%
Business conference or meeting	11%	4%*
Spas	4%	2%
Other	8%	6%

*Significant changes.

Frequent Repeat Visitors

- Engage Frequent Repeat Visitors to encourage building ambassadors.
- Include Frequent Repeat Visitors within Repeat Visitor marketing outreach and research
- Each year the VSC team will develop an annual business plan detailing tactics of how to address each of the above strategies.



STRATEGIC OPPORTUNITY

Community Building Blocks Model:

Align visitors to Sarasota County along a progression range that highlights the visitor spending options that progressively increase investments across the county.

This progression range entitled “Community Building Blocks Model” allows Visit Sarasota County to help community leaders and businesses understand the desired outcomes of tourism development efforts, particularly how those efforts deliver support for community needs.

COMMUNITY BUILDING BLOCKS MODEL



VISITOR TYPE



BUSINESS INTERACTION & SPENDING



FUTURE OUTCOME

New Visitors

Lodging businesses, Restaurants/Bars/Nightclubs, Attractors & Attractions (Outdoors & museum related), Discretionary Retail, Airport, Conference/Tournament Registrations

Progress to Sporadic Repeat Visitor after three vacation/leisure visits within four-year span.

Sporadic Repeat Visitors

Extended-stay Lodging/Vacation Rentals, Restaurants, Groceries, Attractors (more than attractions), Cultural Performances, Events, Spectator Sports, Trip specific retail (family entertainment mixed with need-based (groceries & services))

Progress to Frequent Repeat Visitor after six vacation leisure visits within six-year span.

Frequent Repeat Visitors

Real Estate Sales, Medical/Hospital, Attractions (more than attractors), Wellness, Cultural Organizations (support operations & programming as donor), Business Opportunities, Employment Opportunities

Progress to New Resident following purchase of property and physical habitation between April & December). Utilize as community ambassadors to provide invitations to friends and relatives for future visits.*

New Residents

Building and Construction trades, Residential Services, Financial Services, Education, Community Organizations, Business Opportunities, Employment Opportunities

No further progression but provides key catalyst for future development of community assets through investments. Catalytic for producing future destination visitors through friends and relative connections.

Note – Some seasonal visitors may choose to remain permanently as a Frequent Repeat Visitors. For those visitors, community engagement emphasis should be placed on cultural organization support needs and wellness to enhance their investment in the community.

ROLE AND IMPORTANCE OF THE BEACHES

Recommendation:

As the beauty and pristine condition of Sarasota County's beaches has become the destination's calling card, continued focus, investment and emphasis should be placed on the beaches.

Short Term Recommendation:

Consider beach related opportunities that differentiate Sarasota County from other beach destinations i.e. food and beverage service on the public beaches, beach-related events, the communities that support our assets around the beaches. Refine beaches level of service in line with the three-tiered model.

Long-Term Recommendation:

Invest in a carrying capacity study to understand the pressure on the beaches and ensure they are enjoyable for visitors as well as set their expectations. This would also include reviewing transportation options and required investments.

The beaches of Sarasota County have been the lead item for the County as a destination because of their natural beauty and condition and it has worked, with roughly 70% of all visitors spending time at the beach. In February 2017, TripAdvisor's Travelers' Choice Awards ranked Siesta Key Beach the number one beach in the USA. And it is not the first time the county's beaches have reached that top spot on coveted beach lists. With this in mind, it is impossible to develop a long-range tourism plan without the beaches playing a primary role.

However, in the same ranking in 2017, seven other Florida beach destinations were in the top 10 and 10 more were placed in the top 25. This means the beach has stiff competition and will require ongoing investment into the future. In addition, the "beach goer" can only spend a certain amount of time engaging in beach activities. This supports the importance of enhancing additional experiences for visitors.



BEACH LOCATION AMENITIES



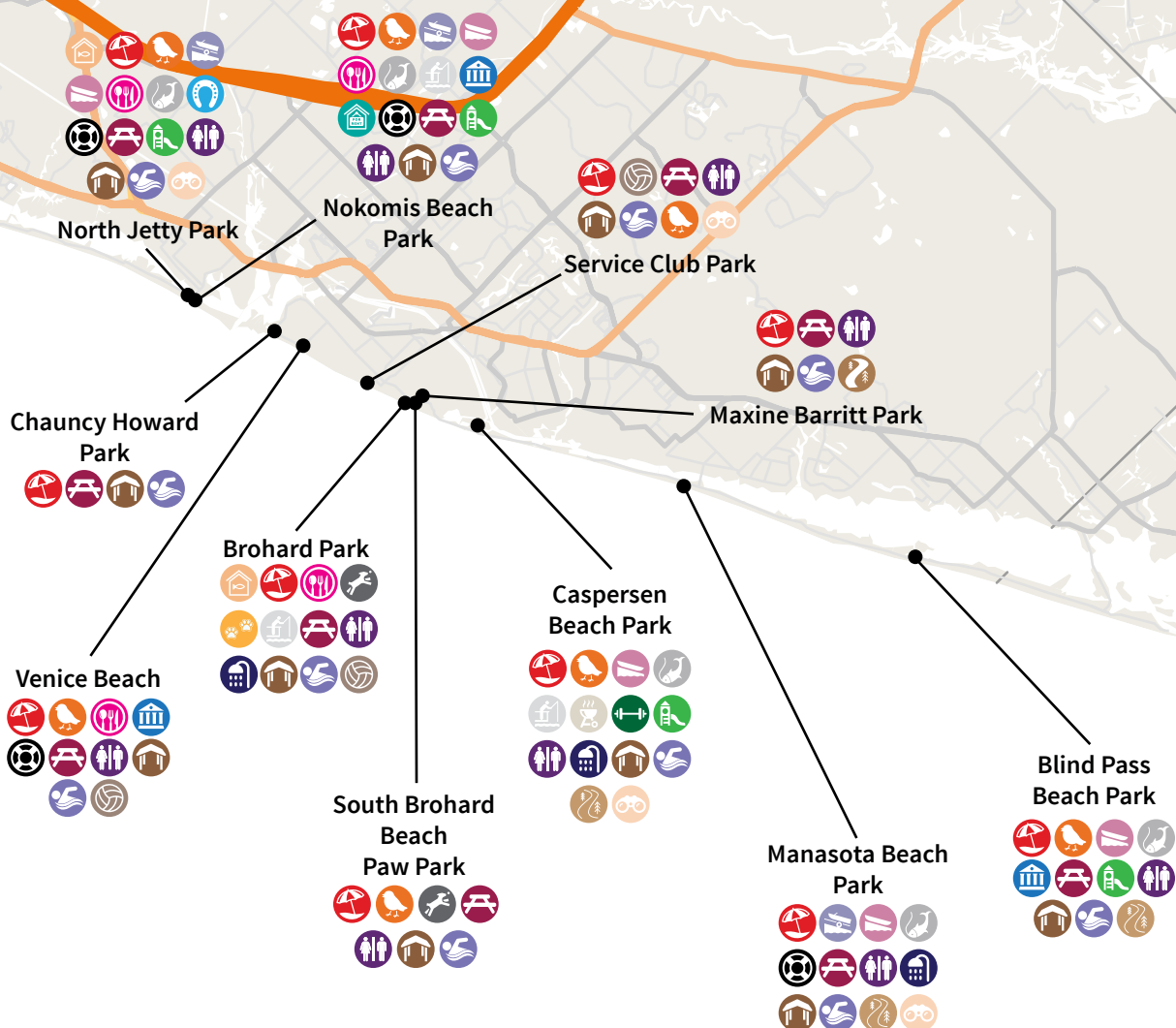
STRATEGIC DIRECTION

Collaboratively invest in programming to strategically activate beaches and create interest in beach destinations throughout the county. This will not only create unique experiences for visitors, but potentially activate areas of Sarasota County's beaches that are not as popular, lessening crowds and traffic in those areas and diverting attention to alternative beach areas.

- Often, the beach is seen as a passive recreational opportunity to relax and unwind, which is still important, however there is an opportunity to tap into more active programming for beach activities.
- This could include creating or investing in existing events, enabling outfitters and guides to rent products or teach active sports in certain areas i.e. kitesurfing, kayaking, etc.
- Allow vendors to conduct and enhance business services that could be provided to beach goers.
- The County Parks Master Plan calls for an evaluation for additional beach amenities. These might include enhanced business services that could be provided to beach goers such as food service, chair service etc. As County Parks, Preserves and Recreation has oversight over all public beaches, it will be important to integrate visitor needs into the ongoing planning process by the County.

KEY

Bait Shop	Beach Access	Birding	Boat Ramp	Camping	Canoe/Kayak Launch	Concessions/Restaurant	Dog Park	Dog Friendly	Fishing
Fishing Pier	Grills	Historical/Cultural Resource	Horseshoes	Indoor Rental	Lifeguard	Outdoor Fitness Equipment	Pickleball	Picnicking	Playground
Pool	Restroom	Rinse Station	Shelter/Pavilion	Swimming	Tennis	Trail - Paved	Trail - Unpaved	Volleyball	Wildlife Viewing



Existing Challenges and Future Focus Areas

Infrastructure & Congestion

- With more than 35 miles of beaches, across six communities, there are only nine access points from the mainland.
- One of the most cited issues in this DSP process was traffic and congestion getting on and off the islands and getting to and from the beaches. Seasonal and year-round residents can feel slighted that the home they chose is over run and mismanaged when it comes to traffic.
- Visitors can be left with a bad impression after sitting in traffic to get to the beach – the famous beaches they came to enjoy.
- This issue needs to be addressed to solve problems on both ends of the equation.

MAINLAND BRIDGE TO BEACH LOCATIONS

Name	Address
John Ringling Causeway (Lido & Longboat)	420 John Ringling Causeway, Sarasota
Sarasota Bay Bridge (Siesta)	1475 State Hwy 758, Sarasota
Stickney Point Rd Bridge (Siesta)	6470 Hollywood Blvd, Sarasota
Blackburn Point Bridge (Casey/Nokomis Beach)	576 Blackburn Point Rd, Osprey
Albee Rd Bridge (Casey/Nokomis Beach)	1010 Albee Rd W, Nokomis
KMI Bridge (Venice/Caspersen)	458 N. Tamiami Trail, Venice
Venice Avenue Bridge (Venice/Caspersen)	220 E. Venice Ave, Venice
Circus Bridge (Venice/Caspersen)	5 Tamiami Trail, Venice
Manasota Beach Bridge (Manasota/Blind Pass Beach)	Manasota Beach Road, Englewood



STRATEGIC DIRECTION

- Begin the process to implement a water taxi service to move people to the beaches.
 - Destinations such as Fort Lauderdale have embraced the water taxi concept and now have a robust service with a fleet of 14 taxis across three different routes for 12 hours a day. The water taxi is not only a viable and very successful alternative mode of transportation, it also offers visitors a unique experience. Water taxis have been implemented in many destinations with Miami looking to expand service and Clearwater Beach expanding service to neighboring towns like Dunedin.
- Vet the potential of a public-private partnership for expanded public transportation for beach access.
 - Several transportation studies have been conducted in the last decade with few having recommendations implemented to effect positive change in the county. Sarasota County is evaluating SCAT and future trolley systems, at the time of this report. It is critical that the visitor experience is considered when developing and expanding new service.
- Work with the Sarasota/Manatee Metropolitan Planning Organization on the 2045 long-range transportation plan.
- Vet the potential to implement a paid parking program for popular beach areas
 - Most of the beach parking is currently free. With a paid parking model in place patrons would be more likely to carpool. Any discussion on decisions regarding paid parking need to include a consideration of the visitors and their associated behaviors.

Access

Maintaining the convergence of visitors and residents as part of the Sarasota County beach experience is important to the welcoming and friendly nature of the destination. In addition to the infrastructure recommendations, additional strategic opportunities should be considered for implementation of the DSP.



STRATEGIC DIRECTION

- Signage and promotion for off-beach activities needs to promote local businesses.



Lodging

Continuing to encourage investment in lodging development and renovation will be important for raising the profile and maintaining attractiveness/quality for potential visitors, particularly international travelers. Although, Sarasota is experiencing a significant increase in hotel rooms, understanding the balance and dynamics of desirable lodging product will be important over the next several years.

Water Quality

Sarasota County has experienced routine beach water quality health warnings during the past several years. 2018 was a particularly trying year with Red Tide leaving much of Sarasota County's beaches and waterfront vulnerable. This year's impact will be felt in TDT collection, occupancy rates and overall visitor impact. While this is an area that does not have an easy solution, it must remain a top of mind issue in order to be prepared for the next occurrence.



STRATEGIC DIRECTION

- Continue to partner with federal, state and local organizations to ensure the latest water quality information is available and is communicated to visitors and partners
- Support federal, state and local organizations in its attempts to improve their ability to forecast marine algal outbreaks and their intensity
- Elevate other non-beach related experiences

PUBLIC VENUES

Across Sarasota County there is a variety of venues for sporting events, arts, and other recreation. There are also potential opportunities for new venues that need to be considered for development in the destination's future. It is important to remember that the venues included have visitor-facing implications and are not purely for local use. This section is focused on the current positioning of existing venues and the potential for strategic investment and emphasis in specific areas.

Sports

Background:

Youth sports and sports tournaments in Sarasota County drive \$213 million of economic impact into the community growing at 21% annually, according to the recent history studied. There are roughly 40 sports-related venues across Sarasota County with 16 key venues with the potential to bring visitors to Sarasota County for competitive tournament play. In the last three years (2015-2017), the top booked venues for sporting events included:

1. Nathan Benderson Park
2. Fox Lea Farms
3. IMG Academy (Manatee County)
4. Premier Sports Campus (Manatee County)
5. Orioles Complex



With two major league baseball venues, a world class rowing facility and other best-in-class unique sporting facilities i.e., polo, BMX, Sarasota County has more potential to compete in the youth tournament marketplace. **This takes both a financial and sales commitment from the VSC promotion budget.**

Seasonality

These venues all have complex booking windows and cycles based on seasonality and existing “tenants” use of the facilities. While this can be challenging to navigate, it will be critical for VSC to continue to work collaboratively with these venues, and other new venues, on partnering for business where possible. The primary availability for most sports tournament venues is the summer months when the existing “tenant” in the venue or the primary use is lessened. With new hotel inventory coming online within the County, sports business in the off-season could be highly valuable in sustaining tourism efforts when stakeholder businesses need it most.

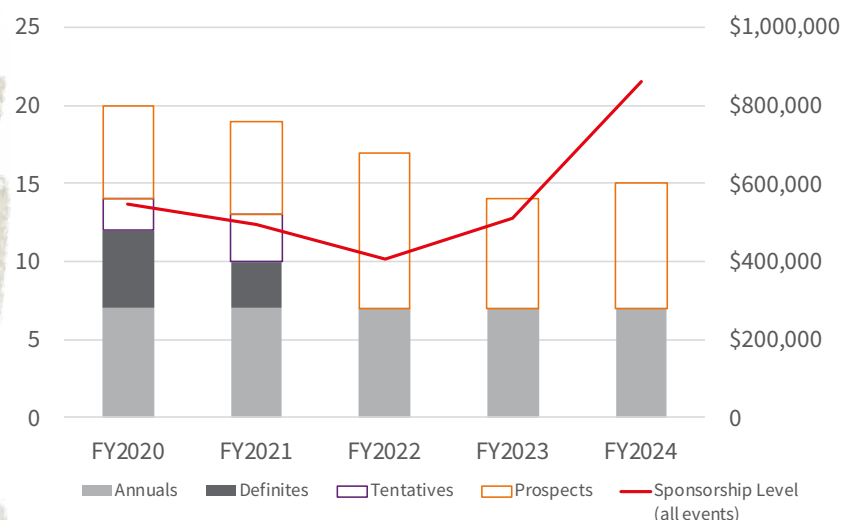
SARASOTA COUNTY SPORTS VENUES BOOKING AVAILABILITY													
Venue	Jan.	Feb.	Mar.	April	May	June	July	Aug.	Sept.	Oct.	Nov.	Dec.	Daily Restrictions
Ed Smith Stadium	X	X	X	O	O	O	O	O	O	O	O	L	
BOBC	X	X	X	O	O	O	O	O	O	O	O	L	
Braves Complex	X	X	X	O	O	O	O	O	O	O	O	O	
Nathan Benderson Park	O	L	L	X	X	O	O	O	L	X	X	O	
Sarasota Polo Club	X	X	X	X	L	L	L	L	L	O	O	X	
Selby Aquatic Center	X	O	O	O	O	O	O	O	O	O	O	X	3-8 PM M-F
Sarasota BMX	O	O	O	O	O	O	O	O	O	O	O	O	
Premier Sports Campus	L	L	L/X	X	O	O	O	O	L	L	L	L	Lights off by 10 pm
IMG Academy	L	L	L	O	O	O	O	O	O	O	O	O	
Fox Lea Farms	X	X	X	O	O	L/X	X	L	L	L	O	O	
Siesta Key Beach	L	X	X	X	L	L	L/O	L/O	L/O	L/O	L	L	
Cal Ripken @ YAC	L	L	L	L	L	L	O	O	O	O	O	O	
Babe Ruth Park	L	L	L	L	L	L	O	O	O	O	L	O	
Englewood Sports Complex	O	X	X	X	X	O	O	O	O	O	O	O	Feb-May no Saturdays
Twin Lakes Park	O	X	X	X	X	O	O	O	O	O	O	O	Feb-May no Saturdays
Wellfield Park	O	O	O	O	O	O	O	X	x	X	X	O	Aug-Nov. no Saturdays

X = No Availability; L = Limited Availability; = Open

SPORTS SALES & MARKETING STRATEGIC DIRECTION

Over the last three years (2015-2017), VSC has booked more than 350 events into these sports venues that impact the Sarasota community. In reviewing VSC’s pipeline for sports sales efforts, JLL recommends setting goals with key partners to increase the impact from sports-related bookings. Visit Sarasota County currently has a combination of 85 future events for the next five years in the pipeline. It must be understood the sports event itself is a marketing activity. The ability to attract future events is tied to funding for VSC sales and sports sponsorships.

VSC PIPELINE SPORTS EVENTS



Recommendation:

- *There must be adequate funding for the sports sales efforts and the funding necessary to secure the events themselves and this cannot come at the expense of general tourism marketing*
- *Prospect events that fit the partner venues' seasonal availability*
- *Collaborate with partner venues on potential goals for efforts coming out of VSC to book venues*
- *Collaborate with hotel partners on seasonal needs and targeting plans*
- *Sponsorship of a sports event is a marketing activity that brings visitors and room nights to the destination*



Future Opportunities

As the demand for sports tournament facilities continues to increase, VSC has experienced the competitive nature of this industry. As such, new opportunities for sports development were contemplated in this effort. This kind of facility should be positioned to impact the seasonal nature of the destination.



STRATEGIC DIRECTION

- Study the feasibility of an indoor flexible sports tournament facility
 - A feasibility study should be conducted to vet a new facility or retrofit an existing facility
 - Key criteria will to be determined is the size, location and potential programming of a future facility
 - Determine the potential for the current fairgrounds to play a role in new facility development

Recreation

Background:

One of the key leisure activities for visitors to Sarasota County is to experience nature and the outdoors through active and passive recreation. This kind of recreation is different than tournament sports and is much more focused on the assets and amenities that Sarasota County offers an individual visitor. These include:

- Water activities, i.e., kayaking, paddle boarding, etc.
- Nature tours
- Birdwatching
- Fishing

According to VSC research, 87% of visitors participate in these kinds of recreational activities when they visit Sarasota County. This demonstrates the importance of the recreational product and the future need to elevate these experiences.

Challenges and Support Needs

Today's travelers want to experience more than just the typical R&R on a vacation. They want to be more hands-on whether that means paddling down the Myakka River or seeing something totally unique like the Celery Fields. Sarasota County has experiences to offer, but there are opportunities to increase visibility and patronage of the outdoor and recreational experiences for future use.

- **Business environment** – creating appropriate and sustainable opportunities for businesses operating in recreational areas
- **Product opportunities** – areas where the product is unique, but the visitor-facing amenities need support
 - Warm Mineral Springs
 - Product is awaiting renovation
 - Myakka River State Park
 - Singular facility to access amenities and rental equipment
 - Myakka State Forest
 - No rental vendor for paddle sports equipment and no restroom facilities, limits visitors ability to experience the forest



STRATEGIC DIRECTION

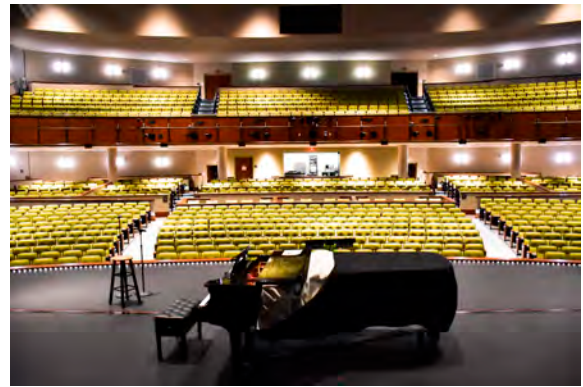
- Create a more business friendly environment on public lands
- Work with local businesses to seek investment in products and ensure products are marketable for a positive visitor experience
- Work with local businesses and municipalities to enhance product offerings onsite including the ability to rent equipment
- Local municipalities should implement signage for wayfinding to ensure visitors feel connected to the destination as a whole



Arts & Culture

Background:

Sarasota County has a rich and diverse arts and cultural community with offerings ranging from the Sarasota Ballet to The Ringling. Sarasota is known as Florida's Cultural Coast for a reason. The concentration of high-quality arts and cultural experiences provide an unprecedented entre to the arts when compared to similar sized destinations.



Because of the concentration of high quality arts and culture amenities within the destination, Sarasota County has opportunities to grow its market share of cultural tourists. Stakeholders agree that the arts and culture offerings of the county are a significant asset, with arts and cultural ranking above the beaches as one of the county's top strengths and second as the current demand driver for visitation. Stakeholders also gave Sarasota County's arts and cultural four out of five stars when comparing our offerings to other destinations.

Challenges and Support Needs

However, with this in mind, visitors may be unaware or not have as strong a perception as stakeholders and residents do of the County's arts and cultural offerings. According to VSC's research, arts, cultural and the performing arts are not strong differentiators for Sarasota County when it comes to visitor perceptions with Sarasota County receiving a rank of 32nd for "cultural" and 34th for "theatre and performing arts" in a recent emotional mapping study. Additionally, only four percent of visitors come for and participate in the arts and cultural offerings.

The secondary challenge is that arts and cultural enthusiast travelers can be hard to come by. Those are visitors traveling to participate in the arts as their *primary* reason for the trip. However, the good news is 54% of Americans participate in the arts according to the 2017 Survey of Public Participation in the Arts, which is a joint effort by the National Endowment for the Arts and the U.S. Census Bureau. This means there is an opportunity to target culturally inclined visitors.



Seasonality

Like sports, many of the performing arts companies in Sarasota County are seasonal. The shift in demand for "high season" is between January and May with the "low season" being June through October. Several companies and venues experience a "shoulder season" between November and December when the snowbirds begin to come down from their primary residences.



SALES & MARKETING STRATEGIC DIRECTION

With this in mind, VSC will need to continue to work with local organizations to elevate the arts and cultural product Sarasota County has to offer. Throughout the planning process, the phase of "needing something to do when it rains" came up often, however the quality and unique nature of some of the County's arts and cultural assets should be positioned as more than a rainy-day activity.

- VSC should work with the arts and cultural venues and partners that have ticket data to refine marketing efforts
- Target shoulder and off season experiences to drive visitation when lodging partners have more availability.

Future Venue Opportunities

As mentioned in the sports portion, the DSP is meant to look forward and provide a roadmap for Sarasota County's tourism future. This is an opportunity to consider new product development possibilities and vet new development that impacts the tourism landscape.



The Bay

The Bayfront 20:20 project has the potential to dramatically impact Sarasota's product offering as a wonderful residential amenity, but an even more desirable amenity for visitors. The Bay is a project that was initially studied and backed by VSC, but is now in a fundraising and financing phase. The project contemplates:

- Pedestrian walking and biking paths
- Observation piers over the bay
- Food and beverage outlets
- Ecological gardens
- Amphitheatre setting
- Adventure play area
- Performing Arts Center
- Waterfront Trail
- Canal area for boats
- Soft launches for kayaks and other paddle sports
- Pedestrian connections across Blvd. of the Arts, 10th and 11th Streets



STRATEGIC DIRECTION

The Bay project should be supported by partners including the County and municipalities. This kind of development on the mainland of Sarasota will not only provide more amenities for visitors along with the residential benefits, but it will also potentially lessen the stress on the beach communities as this initiative will make Sarasota's bay more accessible and desirable to enjoy.

- VSC and its stakeholders should continue to work with The Bay project leadership to vet the potential of adding water taxi areas within their planning as this will create more connectivity and access as well as alleviate traffic and congestion
- Support avenues for public-private partnership and fundraising initiatives to finance the project

Multipurpose Conference & Event Center

Throughout the DSP effort, a need for a conference facility continued to surface. Efforts for a traditional conference center as well as discussion for a public-private project had also taken place in the past to some degree. What is clear is the interest in, and need for, larger gathering space within the County. Stakeholders agreed as well that meetings and conferences could be a larger market for Sarasota County because of all the other natural amenities that make it a great place to visit. Stakeholders also agreed that the lack of large venues is a deterrent for Sarasota County to compete in this space.



STRATEGIC DIRECTION

- As mentioned in the sports section, further study should be completed to vet the potential demand for conferences and meetings in the County
- Key aspects to be studied for a conference center includes location and walkable proximity to downtown and area hotels, programming and overall size as well as funding and public private partnership opportunities. It will be critical for any future conference center development to be located within walking distance of the downtown hotel inventory

Similar concepts have been considered and developed in other Florida beach communities including Lee County where the City of Ft. Myers recently entered into a public-private partnership to develop a hotel and conference center on the river in downtown. This could be a viable route for Sarasota, especially with the new hotel inventory coming online. The hotel room supply will need to be filled with new visitors and the conference/meetings industry.



STRATEGIC DIRECTION



- Work with developer partners to provide research and insight on visitor trends and interests
- Work with the residential community to understand their interests in new amenities that could also bring visitors into their community
- Develop a strategy to implement a “quality of place” program across the county as an extension of the brand essence from the 2020 plan

Large-scale Development

Sarasota County is experiencing a building boom, with developments like West Villages and Lakewood Ranch creating and expanding new communities. There is an opportunity to work with these communities on future projects to consider the visitor as they plan out new spaces. Many of these kinds of developments are creating new downtowns or community centers. These can become destinations of their own.

EVENTS

Any comprehensive tourism plan should include a proactive strategy for leveraging and growing events that are of the scale or popularity level to drive overnight visitors. Destination marketing organizations (DMO) and event organizers understand the potential value of such events because of the economic impact they can have on a destination. Events can be a critical component of increasing overnight visitation or expanding tourism opportunities in a shoulder of off-season demand periods for businesses and industry stakeholders.



Background:

JLL's research indicates that there are currently a limited number of events held in Sarasota County, excluding sporting events, that have been a significant draw for overnight visitors. Current countywide events understood to be connected to tourism as demand drivers include the Sarasota Offshore Grand Prix, the Suncoast Boat Show, Suncoast BBQ & Bluegrass Bash. These events have all been built to achieve a level of scale that impacts the community through money spent by overnight visitors and the ROI from increased tax collection. There are several other smaller events that also have potential to grow to this level and beyond.

In addition, VSC manages a comprehensive calendar of events and works with event organizers to get as much event data entered into its system for promotion and inclusion in the calendar.

Goal

Sarasota County has the potential to promote new and existing events for the destination that would deliver new overnight visitors into the County. The overarching goal related to events is to generate overnight stays into the County. To do so, VSC and its partners in the community will need to utilize the county's current event landscape and position existing events to drive target audiences to attend. In addition, new events should be analyzed through the overnight visitation lens and consider seasonality.

Importance and Components of an Event Strategy

While event organizers and destination partners in Sarasota County have worked together to promote events of various sizes, no formal event strategy exists to guide whether and how Sarasota County and VSC can promote events with the potential to drive sizeable overnight visitation. To fully leverage the potential of such events, an outlined events strategy and countywide process to align stakeholders and organizers around a common set of overnight visitor generation goals is needed. An inherent part of this process will be articulating criteria by which potential events can be judged and the outcomes against which the potential impact of the event can be measured.



STRATEGIC DIRECTION

- Implement a countywide event evaluation process to determine how VSC promotes events
- Events should be evaluated based on an agreed upon matrix of relevant criteria that measure the economic impact of the event on the community. *Below is a sample matrix that could serve as the baseline for ongoing event promotion in Sarasota County. A copy of this matrix is included in the appendix*
- In addition to guiding decisions on promoting the event, the matrix also communicates to event organizers the county's criteria and priorities and allows them to structure their events accordingly.
- In this effort, VSC should work with partners to set multiyear goals to grow the number of overnight visitor generating events and their respective impact across the county

Components	Fail	Poor	Average	Above Average	Excellent	Total Points Awarded
Point Allocation Maximum = 5 points per component*	1	2	3	4	5	
Program Components						
Tourism Promotion impact (room nights)						
Benefit to the Destination						
Unique/Selling Point						
Evidence of Partnership						
Organizational Structure & Management Capability						
Economic Impact						
Quality of Research						
Suitable Target Market						
Comprehensive Marketing Approach						
Evaluation/Measurement Plan						
Scale of Project						
Total						
Maximum possible points = 55						0

Technology & Communication

Aligning stakeholders on timing of events to ensure that there is coordination throughout different parts of the county occurs. It will be important for VSC to take a lead role in communicating and aggregating this kind of event information to partners. This will require VSC to build on the existing calendar data generation practice it currently produces. The ability to share the breadth of visitor-facing activities occurring in a destination can be a strong selling point to travelers.



STRATEGIC DIRECTION

- Currently the VSC calendar is distributed to 1,045 businesses which should be expanded to business sites where visitors most frequent
- Implement an event development program to educate stakeholders proactively on the kinds of events and quality of events the County needs to be successful. This includes all municipalities, chambers and other businesses



Measurement and Reporting

Another critical component of an event strategy is the ability to measure success and a standardized way to report results to stakeholders. Without the elements of measurement and reporting, the destination misses an opportunity to report on key outcomes of the event to stakeholders and show the return on investment of supporting those events.

As a member of Destinations International, Visit Sarasota County can gain access to the Event Impact Calculator produced by Destination's International (DI) and Oxford Economics for events measurement. The Event Impact Calculator is a highly valuable tool that produces output in terms of visitor spending and tax collection.



STRATEGIC DIRECTION

- VSC should utilize a measurement model for events and festivals to measure and report out on events that VSC promotes throughout the county
- VSC should work with partners and event organizers to integrate their data
- The output should be reported out to stakeholders. This will standardize the reporting so that events are using the same formulas and metrics when calculating the event's impact.



STRATEGIC DIRECTION

As the downtown areas continue to grow, a planned growth strategy to manage events and balance the number and type of events should be considered. This will ensure the right events have the ability to have success and the right impacts on the community.

- Work with all the municipalities to adopt an Event Matrix and Criteria
- Partner with each municipality to measure and report on events
- Work with partners, organizers and stakeholder businesses to advocate for regulatory changes as needed

Regulatory Process Improvements

The downtown scenes in Sarasota and Venice have evolved and are continuing to develop into vibrant downtown communities with various districts and sites for visitors to enjoy. The downtown communities play host to many local and potentially significant visitor-facing events. However, existing regulations and City ordinances could put the downtown areas at risk for losing their potential as a host location for events.

PREPAREDNESS

Recommendation:

Maintain and constantly update a system for mitigating catastrophic events impacting travel to Sarasota or perceptions of the area.

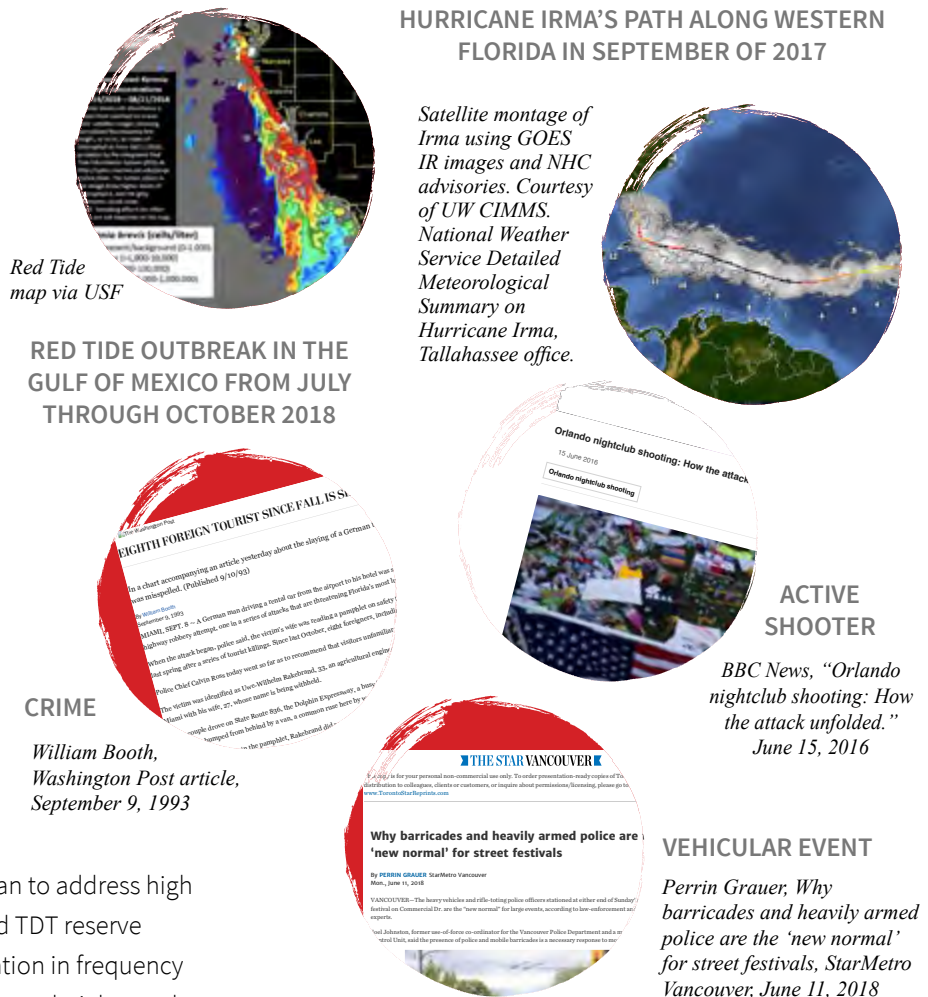
Background:

On September 14, 2018, the Florida Legislature Office of Economic and Demographic Research included the following statements in the report entitled Florida: Long-Range Financial Outlook:

- Currently, tourism-related revenue losses pose the greatest potential risk to the economic outlook.
- Previous economic studies of disease outbreaks and natural or manmade disasters have shown that tourism demand is very sensitive to such events.

The economic risks associated with unknown catastrophic events presents a planning challenge for Sarasota County. The delicate balance of proactive preparation with reactive response is a fact of life for tourism to the area. Disasters have become mainstream operational considerations. The consideration is no longer “if disaster strikes” but rather “when disaster strikes” and how often. Examples include:

Currently, VSC utilizes a pre-programmed Crisis Plan to address high impact events. Sarasota County has an established TDT reserve budget to help address these situations. The elevation in frequency for headline grabbing natural and man-made disasters heightens the potential reliance on these reserve funds.



STRATEGIC DIRECTION

- Streamline the process to allow for ease and speed of access to the TDT promotion reserve funds.
- Enhance the Crisis Plan to:
 - acknowledge the growth in types of disaster situations
 - enable scenario modeling to act as the deciding factor over a legislative budget process
 - align and coordinate thoroughly with County and municipal operational and public safety plans.



FUNDING IMPLICATIONS AND STRATEGIES

Budget Implications

Recommendation:

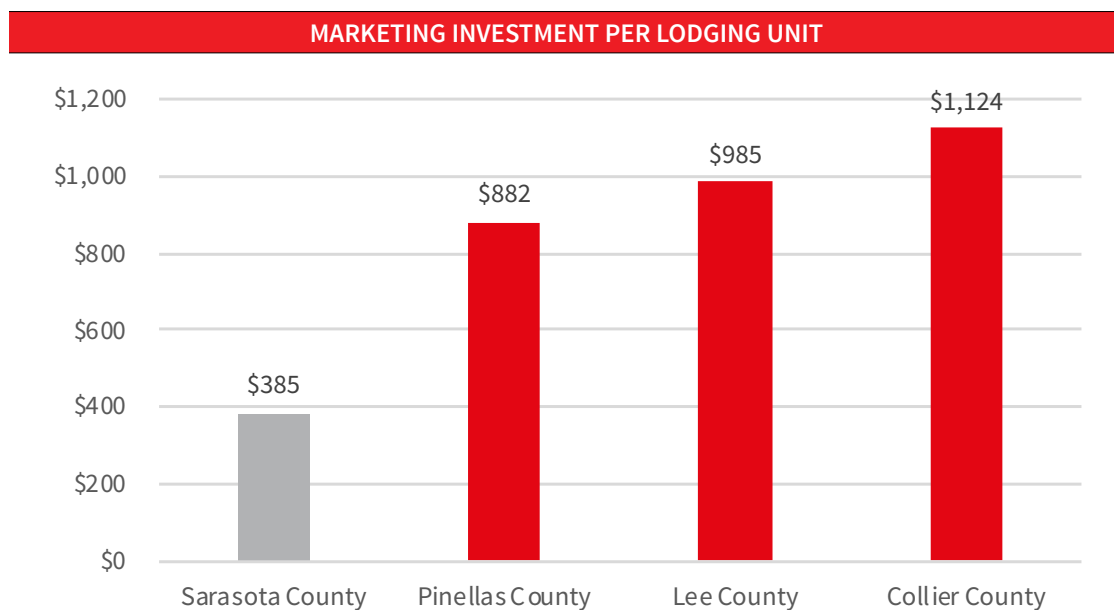
Develop new and additional funding concepts for tourism development efforts to help relieve strains on the existing Tourism Development Tax (TDT).

Background:

Over the past four years, the TDT has grown in unprecedented fashion. While TDT funding demands have also reached unprecedented levels. The solution for absorbing these demands has been to erode marketing investments in VSC. This solution was readily accommodated when TDT growth was rampant, but the ability to absorb marketing cuts is projected to hit a painful point in 2020. In that year, reductions in marketing investments will hit when new inventory supply causes pricing cuts at hotels, which will produce a downward shift in TDT collections. The ability to make needed TDT investments becomes constrained and the future funding needs are delayed.

Visit Sarasota County's research shows TDT declining from 2019-2022⁵.

Declining projections of tourism development tax collections become magnified by disparity in overall marketing investments by direct competitors:



Visit Sarasota County, "Impact of Sarasota County's Economy from Tourism Promotion Reductions," 2018.

⁵Downs and St. Germaine Research, "Examining the Impact of Changes in Sarasota County Tourism Marketing Budget on Tourist Development Tax Collections in Sarasota County", a presentation for Visit Sarasota County, 2018.

When actual operating budgets are placed side-by-side the disparity is even more pronounced.

MARKETING BUDGET COMPARISON				
County	TDT Collection	CVB Budget	TDT Rate	CVB Budget as % of TDT Collection
Pinellas	\$54.7 million	\$32.8 million	6%	60%
Lee	\$42.1 million	\$19.6 million	5%	47%
Collier	\$22.5 million	\$10.5 million	5%	47%
Sarasota	\$21.3 million	\$6.3 million	5%	30%

Currently TDT funds are pacing towards a total budget \$20,750,000 for FY2020 with an investment distribution of:

SARASOTA TDT DISTRIBUTION		
Program	2019 TDT	2020 Projected Amount
Beach Maintenance	24%	24%
Beach Renourishment	10%	10%
Aquatic Nature Center	10%	10%
Sports Stadium	16%	21%
Promotion	30%	25%
Arts	10%	10%

The demands on TDT and the continued need for marketing driven return on investment by VSC programs highlight a need to examine funding alternatives. These alternatives are needed to supplement investments in VSC initiatives, craft tools that can help officials quantify and filter future investment decisions to ultimately set a goal for all affiliated parties to pursue.

STRATEGIC DIRECTION

There are opportunities for new funding streams through the creation of a model and tools to ensure TDT investments are being made strategically. The Lodging industry will fund and work with Sarasota County in establishing a countywide Tourism Business Improvement District.



In November of 2015, Tampa introduced the concept of a Tourism Business Improvement District (TBID) consisting of 15 hotel partners that would collectively generate \$1 million annually for promotion of the area as a tourism destination. This marketing funding model has been implemented in more than 160 destinations across 12 states producing a total of \$340 million in new investment to serve those destinations.

TBID Process:

- Assessment is agreed upon by Lodging providers
- Assessment is ratified by Board of County Commissioners
- Assessment is applied to guest bill
- Assessment is collected through TDT administrative process
- Assessment is interconnected to continued TDT funding distribution levels
- Assessment is governed by the Lodging providers
- Assessment funds are managed and invested by VSC

Building the support and process to implement the assessment would require approximately six months at an initial cost of \$120,000 for legal filing fees and consulting. In the case of VSC, a countywide TBID operating with a 1% assessment for lodging providers of greater than 40 rooms would potentially produce an estimated \$4 million in new business development funding for Visit Sarasota County and nearly \$175,000 in new administrative fees for Sarasota County at no costs to the Sarasota residents and taxpayers.

The Tampa TBID is currently wrapping up a final legal obstacle, but will open the door for destinations across Florida to pursue this funding concept. Sarasota County should begin immediately preparing the needed documents and building support for a local TBID.

Counties charging 6% Local Option Transient Rental Tax Rate⁶:

Broward, Duval, Miami-Dade, Orange, Osceola, Palm Beach, Pinellas & Volusia

TBID Potential to Increase TDT Levy

State Statute authorizes specific investments for each percentage of tax charged, with the first three pennies available for convention centers, sports stadiums/arenas, aquariums, museums, fishing piers, nature centers, maintenance of beaches and beach park facilities. The fourth penny is available for pro sports franchise facilities, spring training facilities, convention center operations and maintenance and promotion/advertising. The fifth penny is available for the same items as the fourth penny with the exception of convention center operations and maintenance.

State Statute also authorizes counties to assess a sixth cent of tourism development tax once collected revenues surpass \$30 million. This threshold is vital to the future of tourism in Sarasota County as it provides a new infusion of funding that lessens the current reliance on stripping marketing dollars to investment in physical asset development. The implementation of aforementioned Sarasota County TBID of 1% would rapidly advance the drive towards \$30 million. The area could easily withstand an increase of 2-3% in total new assessment and TDT rate. It is projected the \$30 million mark could be reached as early as 2026 in this combined scenario.



STRATEGIC DIRECTION

Align all tourism development tax investments and destination growth initiatives along a path targeting the generation of \$30 million in TDT collections by 2026.

⁶compiled from Florida Department of Revenue, "Local Option Transient Rental Tax Rates," August 2018.

As Sarasota County prepares for the previously referenced potential TDT rate increase and the new additional funding it brings, requests for funding will continue to grow and funds will continue to feel strained. Currently all 5 levies are fully maximized, yet the following projects could potentially be lining up to target TDT funding to total over \$7.1 million per year.

POTENTIAL TDT PROJECT IMPACTS		
Use	Description	Potential Request
Promotional Outreach	Promotional investments grew steadily over the past five years but new facilities and facility improvements are diverting funds away from promotional program growth moving forward. If the Sarasota County TBID can be successfully implemented, then this funding need from TDT is solved.	\$1-2 million per year
New Mote Aquarium	The new facility concept with I-75 sight-lines proposed for Nathan Benderson Park requested TDT funding to secure a \$20 million bond for 30 years.	\$1.5 million per year
The Bay Redevelopment	The catalytic Bayfront redevelopment project around the Van Wezel will need public funds to leverage other investments. No requests have been made but early projections could target a \$20 million bond over 30 years.	\$1.5 million per year
Nathan Benderson Park needs	Support of facility maintenance, a much-needed state-of-the-art boathouse and an on-going event hosting fund are needed to ensure the one-of-a-kind facility remain one-of-a-kind and successfully functional.	\$500,000 per year (estimated)
Multi-purpose arena and Conference Center	Discussion around arenas and conference centers has been circulating for over a decade. The area needs to finalize intent and plans for a facility and TDT will certainly be considered as a possible source for funding both for construction and operations.	\$2 million per year for facility operations and \$1 million for sales and marketing
Selby Botanical Gardens	The current capital campaign for the expansion and renovation of Selby Gardens is alluring. No request has been formally made of TDT, but the funding source could be considered as a source.	\$200,000 per year (estimated)
Women's Sports Hall of Fame	Local thought leaders and interested parties have combined to consider the concept for a Women's Sports Hall of Fame. This concept is strictly in planning mode today but could be ready for a formal request in the next seven to ten years.	\$200,000 per year (estimated)



STRATEGIC DIRECTION

Provide a decision-making tool to help guide Sarasota County decisions on future TDT investments.

These are but a few of the projects discussed in recent months. Each of these concepts is strategically sound and could potentially be valuable additions for increasing off-season tourism across Sarasota County. The Sarasota County Board of County Commissioners and its tourism advisory body, the TDC, will benefit from a tool that can guide investment decision making. The following matrix provides a functional resource for decision-making.

TOURISM INVESTMENT DECISION MATRIX FOR CAPITAL PROJECTS

Decision Item	Description	Project	Scoring Notes
Project name	Name of the concept	Sample Project A	
Description	Summary of the proposed project		
Project status	Completed, Under Construction, Shovel Ready, Initial Concept		
Total Project Costs	Total amount needed to fund the proposed project		
TDT or Sarasota County Request	Amount of investment requested from TDT or Sarasota County		
Other Funding Sources	Amounts & names of Non-TDT or Sarasota County funding sources		10 points: >75% Other sources 5 points: 50-75% Other sources 0 points: <50% Other sources
Feasibility Study Results & Business Plan	Results of potential impact provided by an outside consultant of national regard an reputation		10 points: Feasible, Impactful, No funds needed once completed 5 points: Feasible, Impactful, funds needed 0 points: All other ratings
Incremental Annual Room Night Production	Projected annual number of room nights generated by project		
Projected TDT Contribution	Projected annual TDT collections generated by project. TDT contribution should be considered "last money"		10 points: >75% annual TDT ROI 5 points: 50-75% annual TDT ROI 0 points: <50% annual TDT ROI
Attractor Rating	Score from the Attractor/Attraction Scale		Enter Score
Seasonality	Planned benefits to May-December visitor season		10 points for proactive programming targeting off-season overnight need periods
Negative Impacts on Business or Image	Negative impacts on current business or county perceptions		Subtract one point for each current business impact. Subtract 20 points for each potential negative county image impact
Positive Press Attention	Proactive media awareness plan/budget targeting overnight markets		10 points for media relations plan (reviewed/approved by VSC)
Marketing Outreach	Proactive marketing outreach plan/budget targeting overnight visitors		10 points for marketing plan (reviewed/ approved by VSC)
Future Funding Needs	Foreseeable needed public sector investments in maintenance, operations, etc.		Subtract one point for every \$500,000 of future TDT funding support needed
Additional Factors	Compilation of all other positive and negative factors		Subjective (not scored)
TOTAL SCORE	Add/Subtract all points		Highest score equates to most favorable project/potential success but still subject to approval

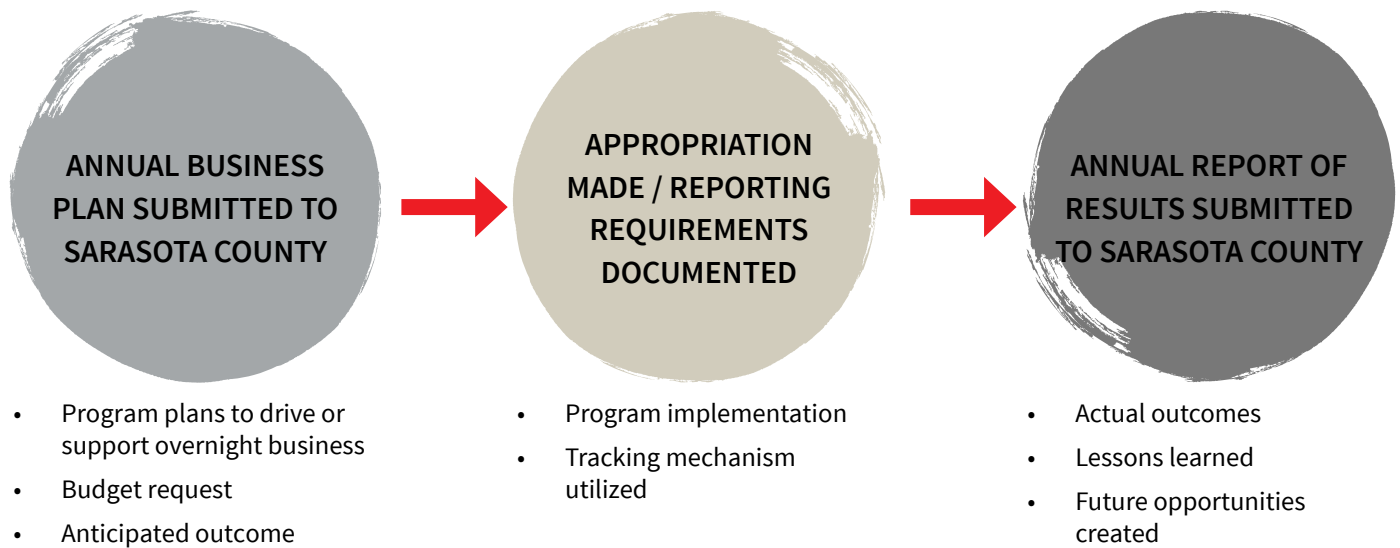
Any TDT contribution should be considered "last money"



STRATEGIC DIRECTION

Implement an accountable reporting process for organizations receiving TDT funding that ties with destination priorities of building first time visitors and driving off-season travel.

Organizations funded by TDT should be fully focused on renourishment of the tax collections. Each organization funded should be tasked with delivering both an annual business plan and a subsequent annual report of outcomes noting all direct connectivity to paid overnight accommodations.



Annual reports should be constructed to include the elements used in the Tourism Investment Decision Matrix based on how the annual business plan was originally proposed and accepted.



Section 5:

Direction of Visit Sarasota County

Recommendation:

Develop programs and goals designed to increase the economic sustainability of tourism and produce off-season visitation growth for Sarasota County.

Background:

Visit Sarasota County operates within full transparency as an accredited independent, not-for-profit business trade organization. In managing its overall mission, the organization must satisfy a large group of stakeholder relationships. For every action taken by VSC or directive given to VSC there is a body public or private that is impacted including visitor audience:

VSC Impact/Role	VSC Stakeholders/Audience
TDI Allocation recommended	Sarasota County Administration, TDC
TDI Appropriation approved	Sarasota County Board of County Commissioners
Accountability monitored	Sarasota County TDC, VSC Board
Direction managed	VSC Board
Programming produced	Visit Sarasota County Team Members
Programming assisted	Visit Sarasota Vendors
Programming engaged	Visit Sarasota County Businesses
Benefit received	Sarasota County Tourism Suppliers, Residents
Benefit shared	Municipal bodies throughout Sarasota County, Residents
Impact perceived	Sarasota County Residents
Visit produced	Actual visitors to Sarasota County
Audience targeted	Potential visitors from around the world

The perceptions and physical touchpoints established across each of these groups impacts the credibility and performance of VSC as a destination marketing and management organization. The future direction must be constructed around the engagement and benefit desired for each group and their associated connection to the VSC's Mission, Vision and Strategic Objectives.

VISIT SARASOTA COUNTY

VISION

**(FROM 2020 TOURISM
STRATEGIC VISION):**

Sarasota County will be a vibrant, cutting-edge destination that offers the finest mix of culture, art, nature, sports, entertainment and business opportunities with the most beautiful, award-winning beaches in America.

VISIT SARASOTA COUNTY

MISSION

**(FROM 2020 TOURISM
STRATEGIC VISION):**

To position Sarasota County as the must-experience destination on Florida's Gulf Coast.

Governance Strategies



Strategic Direction: Cultivate a comprehensive governance environment that fosters communication and performance monitoring across future tourism asset enhancements, visitor services and destination business development investments

Audiences included: Sarasota County, the Board of County Commissioners, the Tourism Development Council, Municipal Bodies, the VSC Board of Directors and VSC Team Members

OBJECTIVE 1:

Build consistent linkages on direction, communications and reporting between the four primary governance bodies (Sarasota County, the Board of County Commissioners, the Tourism Development County and the VSC Board of Directors).

VSC employs a significant amount of research, tracking and reporting as part of its ongoing strategic implementation. This direction recommends establishing a functional system of providing information across each group. Consistency of reporting will allow VSC team members to better focus their time on driving results. The following elements should be included:

- Budget and financials
- Annual business plan
- Visitor profiles
- Overall state of the industry
- Results (successes and failures)
- Directional impacts

OBJECTIVE 2:

Engage County and municipal elected officials on a regular basis.

Establishing relationships early-on allows VSC to build understanding of impacts and direction and cultivate a supportive environment moving forward. VSC should set a regular schedule with the County bi-annually and municipalities at least annually.

As an added benefit, in many destinations, towns and city leaders typically progress into other elected leadership roles in the future, potentially extending these positive relationships that have been created in this effort.

Organizational Strategies



Strategic Direction: Provide a nurturing team environment built on personal accountability in pursuing strategic implementation of direction.

Audiences included: VSC Board of Directors and VSC Team Members

OBJECTIVE 1:

Embed technological tools in all programs and initiatives.

Technology will continue to be a fundamental mechanism for VSC to use in managing direction and pursuing results. Technology interaction and development opportunities should be incorporated into annual departmental business plans from the perspective of both utilization and needs.

OBJECTIVE 2:

Expand the inclusion of Administrative and Support functions in annual business planning.

Administrative support performs its task behind the curtains to ensure the organization functions effectively. Capturing key elements of the support systems needed to prepare business development and visitor services functions for success should be documented annually.

OBJECTIVE 3:

Elevate the whole of VSC as the DMO and lessen reliance on CEO.

Throughout this planning process, the phrase “Virginia’s organization” was said repeatedly, and often with high praise. While Virginia Haley’s leadership of VSC has been award winning and her service to both Sarasota County, the State of Florida and the tourism industry as a whole has been hugely impactful, the future acknowledgement of VSC needs to shift to the whole of the organization. It is easy for an entity to rely on the CEO as the face and microphone, but the organization will not be as impactful without this shift, especially as the organization begins preparing for eventual succession. The Board, with input and guidance from the CEO, will need to lead this initiative. Additionally, VSC works with, and essentially at the direction of, the tourism and hospitality industry. It will be important to involve the industry in this effort as it evolves.

Finance Strategies



Strategic Direction: Supplement and expand (but not replace) current funding TDT funding levels with new sources of revenue.

Audiences included: Sarasota County lodging providers, the Board of County Commissioners, the Touris Development Council, the VSC Board of Directors and VSC Team Members

OBJECTIVE 1:

Utilize industry support to construct new funding streams for VSC outside of TDT funds.

Visit Tampa Bay bravely ventured into uncharted territory with Florida's first Tourism Business Improvement District. VSC should begin pursuing the development of a similar concept before the Tampa model even emerges from the courts. VSC is woefully underfunded to market Sarasota County in an impactful manner. New funding streams as outlined in the earlier Funding Impacts section of this Destination Strategic Plan must be pursued. This revenue must also be viewed as additive and not a substitute for current funding streams.

Brand & Awareness Development Strategies



Strategic Direction: Develop a brand assimilation approach for Sarasota County that drives unified understanding of the destination's potential, livability, dependence on tourism and overall livability.

Audiences included: VSC Partners, VSC Tourism Suppliers, VSC Vendors, VSC Team Members, Potential travelers and actual visitors

OBJECTIVE 1:

Identify audiences and refine brand differentiation to introduce and reinforce Sarasota County as an alternative to other east and west coast beach destinations.

Creating clear brand positioning of a beach-oriented destination is extremely difficult. VSC competes in an environment where the other destinations are armed with significantly more marketing resources, established brands and demonstrative results. The strides taken by VSC with the concentrated public relations pushing of beach ranking, constructing the Beaches and Beyond campaign and connecting the messages to associated niche campaigns provides a notable base for redefining the traditional beach destination. There is a creative opportunity to redefine the context of a beach destination and Sarasota County's product awareness provides a viable starting point to reimagine the destination. This objective envisions reaching beyond the emotional components of the current brand, ignoring the brandscape of "Coast" naming (Emerald Coast, Treasure Coast, Space Coast, Paradise Coast, etc.) and connecting fully with product differentiators built on lifestyle. The blend of Sarasota County product assets, Community Building Blocks model and non-commercialized nature/sports/cultural experiences enables this destination to pursue differentiation in a different manner.

The Downs and St. Germain Research Potential Visitor Study provides a key informational starting point, for example, as more potential visitors think of Kiawah Island as similar to Sarasota County than any other destination (including nearby Gulf Coast beach destinations). In addition, the same study found that for potential visitors the three most important vacation attributes are also the ones that rate Sarasota the highest: beautiful beaches, pleasant place to unwind and scenic beauty.

OBJECTIVE 2:

Connect the Sarasota County brand message to the Community Building Blocks Model to embed product drivers for each prospective audience group.

Embracing the Community Building Blocks Model allows VSC to produce messages that resonate with first time guests, sporadic repeat visitors and frequent repeat visitors in a different manner than many destinations.

- First time visitors must understand the destination and what it offers.
- Sporadic repeat visitors need consistent reminders of the diversity of the destination, specifically those elements that have appeal for them as couples and family travelers.
- Frequent repeat visitors need to be both educated on new products and provided reasons to travel at different times of the year.

OBJECTIVE 3:

Immerse the destination in the Visit Sarasota County brand message.

Placing the VSC logo on the visible water tower along I-75 provides a constant reminder to locals of the great destination that they call home. Additional immersive efforts should be pursued to create a more accepted, living and breathing Sarasota County brand experience. Although these investments and partnerships will aid tourism development, they ultimately drive local inclusivity and acceptance of the brand message. In addition, this kind of consistency will communicate to visitors that the destination offers so much more throughout the county. As an example, rather than use Sarasota TDT as a call to action on TDT-funded cultural programs (a term which has no meaning to consumers), link to the destination web site of Visit Sarasota Arts.

OBJECTIVE 4:

Continue research investments to profile visitors, understand potential visitor perceptions and track changes created in the marketplace.

VSC continually assesses research results to understand market dynamics and success of campaigns. Once compiled, the data should be shared fully with destination partners, community stakeholders and elected officials, both online and in public presentations, including a wider distribution of the assets in the Sarasota County Brand Toolkit.

Business Development Strategies



Strategic Direction: Drive demand for off-season visitation to Sarasota County.

Audiences included: Tourism Industry, VSC Partners, VSC Tourism Suppliers, VSC Team Members, potential and actual visitors

OBJECTIVE 1:

Bolster the SRQ Airport marketing program to create outreach in key points of origin.

The Airline Incentive program produced results, created new routes and encouraged enplanements to support air service. Continuing this program in cooperation with the Bradenton Area CVB will be an important initiative. Because of budget reductions in the immediate future, this will be forced to be reduced. However, reinstatement must be a priority as new funding sources are identified. In addition, the continuation of this program needs specific return on investment measures in order to be successful for VSC.

OBJECTIVE 2:

Pursue focused key media relations initiatives.

Media relations programming has proven to be effective channel for Sarasota County. Efforts are underway to change and improve connections in key point of origin markets. Sustaining and growing this initiative should be a priority as the organization moves forward. In times of budget shortfalls, media relations has opportunity with fewer resources to reach a larger audience.

OBJECTIVE 3:

Integrate media pick-up with digital, out-of-home and other affordable outreach buys.

Media relations can more effectively produce business development results when combined with concentrated digital outreach and highly targeted creative out-of-home media buys. This objective should be connected to a purchasing opportunity, where possible.

OBJECTIVE 4:

Aid the development of a highly engaged and compassionate hospitality workforce.

Recruiting and developing a qualified and reliable hospitality workforce is a growing challenge for destinations like Sarasota County. This rapidly growing jobs sector has a unique set of needs, but is not currently a focus of employment services organizations or regional economic development agencies. Tourism should always be viewed and understood as an economic development priority because of its ongoing importance to the local economy. Workforce recruitment, retention and training should be considered as needed visitor services initiatives.

OBJECTIVE 5:

Deliver targeted niche strategies beyond paid advertising.

The importance of three primary niche markets in VSC communications and activities suggests that personnel focus could be warranted for the future. Treating these topical areas as a niche market business development segment similar to sports or meetings places an elevated level of importance on the niche's ability to drive visits as an attractor. This is a shift from the current approach with all niche's being placed in earned media. This position would cross over between destination development and business development providing guidance for capital direction, exhibition activations, content management and targeted marketing outreach. Future development of new niche markets including wellness should be developed once funding is restored.

OBJECTIVE 6:

Concentrate International efforts on three primary markets: Canada, United Kingdom and Germany.

International visitation is lucrative, but expensive. Efforts to drive business from Canada, the United Kingdom and Germany have produced past results and are part of the Community Building Blocks Model. Continued funding, targeting, programming and monitoring of representation firms in the UK and Germany will be important. Identify means of reaching Canadian customers in Montreal or Toronto, if funding would allow. Media relations and targeted marketing should be added when possible to support representation and in-market activities.

OBJECTIVE 7:

Drive sports demand for tournaments, events and off-season training.

Sarasota County and Manatee County possess sports venue assets that are highly functional, capable of hosting varied tournaments and easily adaptable. Direct sales outreach to targeted sports groups has been fruitful for producing off-season business for the area. Efforts should be intensified to focus on converting prospects to bids and bids to business. Past international event priorities should continue to be pursued but non-peak season events with greatest room night generation, TDT and economic impact events should be an established priority within this market segment. Expertise and insight should be tapped for new venue development discussions. Acknowledge that sponsorship of a sporting event is a marketing tool in and of itself.

OBJECTIVE 8:

Refine the group market segment and increase group bookings for the area.

Group business comes in a variety of shapes and sizes. VSC should clearly define group business desired based on seasonality dimensions and continue to pursue in conjunction with partners. Minority, Social Military, Educational, Religious and Fraternal markets should be prioritized for pursuit. Small medical and pharmaceutical meetings and trainings should be researched as a target based on past success.

OBJECTIVE 9:

Connect more effectively to visitor services.

Group and sports business requires significant hand-holding and support for customer groups and venues. When funding allows, adding a group/events services team member to VSC or re-configuring an existing position would allow sales team members to stay focused on pursuing prospects and converting business instead of providing services. Currently this aspect of VSC impacts overall time availability for selling the destination.

OBJECTIVE 10:

Assemble client-based information and supporting documentation to aid in the development of a flexible multiuse facility on behalf of the County or City.

Meetings and conventions are routinely turned away from Sarasota County based on the lack of a sizable convention/conference venue. As efforts to build a suitable facility in close walking distance proximity to a critical mass of downtown Sarasota hotel rooms heightens, the need for supporting documentation will grow. The VSC business development team and its partners will need to be prepared for sharing information.

Destination Development Strategies



Strategic Direction: Deliver a county-wide approach to further develop and strengthen the Sarasota County destination product offering.

Audiences included: Sarasota County, the Board of County Commissioners, the Tourism Development Council, Municipal Bodies, the VSC Board of Directors, Sarasota County Residents, VSC Partners, VSC Tourism Suppliers, VSC Vendors, VSC Team Members, Potential travelers and actual visitors

OBJECTIVE 1:

Inform local transportation planning committees.

Transportation issues are a vitally important component of Sarasota County's livability and tourism future. VSC should actively seek out opportunities to participate in transportation related dialogue and planning initiatives around the county, but should refrain from assuming key leadership roles in these initiatives. Guiding transportation planning from the perspective of both visitors to the area and the business community that depends on those visitors should be an important part of the future.

OBJECTIVE 2:

Celebrate The Bay within all communications and activities.

The development of The Bay is a long-range project and will transpire over the course of numerous changes to the staffing and board make-up of VSC. VSC needs to remain engaged with The Bay as the project evolves. The Bay leadership also needs to understand the value of VSC as a partner, even as much of the project is geared towards residents, the visitor value is significant. Staffing and Board leadership will need to continually communicate direction, successes, challenges and needs in compelling ways. The tourism connectivity and importance of this project will need to elevate over time. VSC must seek out ways to keep this development project in the spotlight.

OBJECTIVE 3:

Destination Leadership and Trends

VSC must provide destination leadership and industry benchmarks and trends to share with Sarasota County businesses. VSC must seek leadership and training opportunities with organizations such as Destinations International, Visit Florida, Florida Association of Destination Marketing Organizations, etc. and then share knowledge through tourism classes and webinars.

Visitor Services Development Strategies



Strategic Direction: Deliver high-quality, sensory compelling visitor information to educate travelers to Sarasota County.

Audiences included: VSC Partners, VSC Tourism Suppliers, VSC Vendors, VSC Team Members, Regional and Statewide Partners, Potential travelers and actual visitors

OBJECTIVE 1:

Provide innovative information delivery mechanisms that provoke visitor education and entertainment at all points along the Community Building Blocks Model.

The information need, and level of associated interest is different for each customer grouping based on their familiarity with the destination. Visitor services programming should be targeted and designed for each group incorporating technology resources as much as possible. Delivery of visitor information should continue to be diverse but interaction should be focused on expanding trip satisfaction, prompting future travel, lengthening stays in the area, providing tools and motivations for inviting friends and relatives and impacting business growth.

OBJECTIVE 2:

Ensure that VSC visitor services reach and include all audiences within Sarasota County.

A diverse visitor population means increased amount of visitor needs. VSC should become the market leader for developing a truly inclusive visitor destination. The area can build on its history of being socially progressive in designing plans and tactics that address inclusionary needs. Connecting this direction to organizations and businesses in the area will require thoughtful communication and consideration of investment resources.

OBJECTIVE 3:

Refine the role and opportunity for Partnership Development.

Partnership development plays an important role in the financial health of VSC. Partner based programming currently influences listings in promotional resources and information tools. Organizations do not need to be partners to be considered for inclusion in content development around different themes. As the organization moves forward, it is recommended that the role of the partnership program evolve to be more business advisory related. As outreach becomes more targeted and product specific, partnership development will need to secure participants and involvement in new and different ways. Developing a partnership plan can help guide this new programming. In many organizations, partnership efforts can consume staff time/programming. The partnership model should be fully vetted for the need to evolve to promote the most staff interaction with those businesses that most impact tourism success.

DSP Community Goals & VSC Operational/Organizational Goals

Attractions & Attractors

VSC will work with attractions across Sarasota County to complete the attraction/attractor scale analysis.
Timeframe 2021-2022

New & Repeat Visitors

VSC Annual Business Plan will reflect efforts to reach new visitors and to motivate return trips by sporadic and frequent visitors.
Timeframe: 2020-2025

VSC will utilize advertising that is highly targeted with a message that appeals broadly to a new audience while using public relations and social media strategies to reach niche audiences.
Timeframe: 2020-2025

Role and Importance of the Beaches

VSC will pursue strategies to promote all of the county beaches and garner attention for some of the lesser known beaches.
Timeframe: 2020-2025

VSC will influence County beach assessment processes to include discussions on programming
Timeframe: 2021-2023

Public Venues

VSC will assist Sarasota County Government in a study of a multisport facility and/or conference center
Timeframe: 2021

The Bay Park Conservancy will be formed and Phase 1A will be complete with VSC remaining an active participant.
Timeframe: 2023

Events

VSC will implement a countywide event evaluation process using a uniform matrix.
Timeframe: 2021-2022

VSC will set multiyear goals to grow overnight visitor generating events.
Timeframe: 2023-2025

Preparedness:

Sarasota County will create a process to access to TDT promotion reserve funds for emergencies.
Timeframe: 2020

Working with Sarasota County EOC, VSC will continue to refine its crisis plan
Timeframe: 2020-2025

Funding

The Sarasota County lodging industry, lead by the VSC Board, will fund and work with the industry and Sarasota County government in establishing a countywide Tourism Business Improvement District.
Timeframe: 2020

TDT collection will achieve \$30 million enabling the sixth penny to be levied.
Timeframe: 2026

Internal

VSC will maintain DMAP accreditation.
Timeframe: 2020-2025

Destination Strategic Plan VSC Effectiveness Measures

1. Positive indicators in growth of visitor intent to travel generated by marketing campaigns (e-newsletter sign ups/ guide requests/Arrivalist style data).
2. Maintain or exceed at least 50% of visitors to Sarasota who have noticed messages about Sarasota and of those at least 50% influenced by those messages to come to Sarasota.
3. VSC will maintain a Return on Investment of at least \$500 in visitor spending in Sarasota for every \$1 dollar of VSC advertising.
4. Positive indicators in the number of sporting events in Sarasota and their positive economic impact.
5. Positive indicators in the number of meeting and group leads generated by VSC sales for area businesses.
6. VSC will utilize industry measurement platforms to provide actual visitor conversion stats. These stats will be driven out of actual visitors to Sarasota County that were influenced by, and exposed to, VSC marketing initiatives. VSC's annual business plan will project target market's for each campaign and track subsequent visitor arrivals into the destination and partner businesses in a rolling two-year period.

Section 6:

Conclusion

Sarasota County's tourism landscape is rich in assets and amenities. From some of the world's best beaches to offering world class arts and culture experiences, Sarasota County's destination product is currently positioned for success, but the future will require more intensely focused development and promotional strategies.

Undergoing a comprehensive destination strategic planning process is a complex task and taking on the recommendations in this report will require detailed focus and dedication from the leadership team, commitment from partners both public and private and the desire to see the implementation through.

The strategic direction and recommendation contained in the details of this report span the complexity of Sarasota County's geography, diversity in assets and drills down to the VSC organizational level. Because of this complexity and range of areas covered, it will be critical for VSC to create annual business plans that roll back to this plan's priorities and strategic direction. All of the recommendations contained in this report are important to the future success of Sarasota County as a destination and Visit Sarasota County as the destination marketing organization for the community.

It is clear that VSC leadership and the staff are eager to be leaders in their industry and in their community, and to support those efforts the organization's Board must be positioned to be highly engaged and successful. Implementation of the recommendations related to the Board's role in governance, funding issues, and advocacy will support the organization through the next five years.

The successful implementation of the recommendations contained in the plan will require consistent focus and determination even when there are challenges to navigate through.

JLL believes that with the recommendations included in this report, Sarasota County will grow to become a more recognizable and sought after visitor destination, and with it a stronger and more impactful VSC.



Section 7:

Appendix

1. VSC 2020 Plan Outcomes
2. Stakeholder Survey Results
3. Attractions vs. Attractors Scale
4. Event Matrix

Prior Planning

Visit Sarasota County developed its previous Strategic Plan over the course of 2012-2013 with input from 175 community, government and tourism industry participants. The four primary goals of the Strategic Plan were adopted by both the Visit Sarasota County Board of Directors and the Sarasota County Board of County Commissioners.

Goal 1 – Continue to develop and communicate the destination’s brand essence	Goal 2 – Advocate for Destination Enhancing Development	Goal 3 – Elevate the Visitor Experience through enhanced visitor services	Goal 4 – Increase investment into tourism promotion and development
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These goals provide a demonstrable foundation for determining destination and organizational effectiveness. Included below are the goals, recommendations and actions taken from the last planning effort. Visit Sarasota County has worked on all aspects of this effort leading into the 2025 plan.

Goal 1 - Continue to develop and communicate the destination’s brand essence		
Recommendation	Tactic	Actions Taken
Analyze consumer & industry research to identify shifts in visitor perceptions	VSC will budget for research programs and focus group studies.	<ul style="list-style-type: none"> Collected and shared annual research with industry via www.SarasotaCountyLovesTourists.com so it is easily accessible. Conducted and shared additional research such as mobility study and preferences on how visitors prefer to receive information from VSC. Used research at the core of the brand development process including emotional mapping, focus groups etc.
Monitor global consumer & industry trends to identify new markets that would resonate with the Sarasota County experience.	VSC will budget for research programs and involvement with national and international tourism organizations to monitor consumer and industry trends.	<ul style="list-style-type: none"> Expanded German-speaking public relations efforts. By tracking international visitation to Sarasota and Florida, made decisions on deploying marketing funds. Identified the Latin American markets of Brazil and Argentina as growing in visitation for the destination. Invested in tradeshow exposure and marketing campaigns in Brazil and Argentina resulting in a 10 page spread in an Argentinian magazine.

Goal 1 - Continue to develop and communicate the destination's brand essence

Recommendation	Tactic	Actions Taken
Update & refine the brand message and marketing mediums as dictated by research to effectively tell the Sarasota County story.	VSC will take the Colors campaign and its public relations programs to a new level of engagement.	<ul style="list-style-type: none">• Conducted to create new brand. Process and assets were shared at SarasotaCountyBrandToolkit.com.• Expanded public relations audiences to include social media influencers in the travel and tourism sphere, further building awareness of the destination.
Diversify the destination's traditional domestic leisure visitor base with meetings, groups, sports & international business	VSC will plan for strong sales programs for meetings, groups, sports and international markets.	<ul style="list-style-type: none">• Introduced a highly successful meeting incentive program to book more group business to the area.• Introduced a new new group incentives for meeting and leisure groups.• Created new collateral specifically for the Motorcoach market that highlights things to do for bus groups with sample itineraries• Created an in-depth and informative meeting planning guide• Established an online training platform for domestic and international travel agents and tour operators to learn about the area at visitsarasotatraining.com• Entered the Latin American Market with advertising promotions and Tradeshow presence.• Partnered with OPL properties and the Ritz-Carlton for a Pan-Euro Sales mission to train tour operators throughout Netherlands, Germany and Switzerland• Hosted the International Inbound Travel Association (IITA) Leadership Summit• Hosted the Society of American Travel Writers Conference• Broadened Sports Department sales efforts to include attending Sportcal International conference, increased site visits, bids to host Sport Federation conferences, and attending sport-specific tradeshow.• Continued to grow Sports Event Grant program.

Develop collaborative promotions to highlight the culture of Sarasota County	VSC will create opportunities for collaborations, cooperative marketing and public relations opportunities for this key market segment.	<ul style="list-style-type: none"> • Launched May Theater Month in 2016. • Expanded May Theater Month to Summer Stage as summer-long program in 2017. • Secured out-of-home promotional opportunities in Bryant Park, Tanglewood & Jacob's Pillow. • Hosted media for various cultural performances both in key markets outside of Sarasota where Sarasota's cultural entities were performing and within Sarasota for special performances worthy of media coverage.
Establish Sarasota County as a culinary destination	VSC will build on culinary promotions such as Savor Sarasota Restaurant Week and agri-tourism assets to reach national culinary media outlets.	<ul style="list-style-type: none"> • Added more restaurants, advertising and promotions to Savor Sarasota Restaurant Week success. • Hosted celebrity chef for TIME Inc. in NYC. • Performed Facebook Live demos with locally produced spirits in NYC. • Highlighted Yoder's 40th anniversary throughout 2015-2016 including hosting press FAM, mailing pies to national culinary media outlets and more. • Placed Bon Appetit Ad Campaign in 2014 and 2016. • Developed Agri-Guide with Edible Sarasota. • Initiated Chef's Feed influencer and digital ad campaign. • Featured VSC collateral handed out from a Food truck in NYC as part of a Food Network ad campaign branded with a Florida theme.
Anticipated Outcomes by 2020		<ul style="list-style-type: none"> • Achieve 1 million overnight visitors per year <ul style="list-style-type: none"> - Reached 1,085,140 paid overnight guests in 2015 • Achieve top-of-mind awareness as an international destination <ul style="list-style-type: none"> - Ranked 12th in the USA, and 2nd in Florida as an international sports destination on Sportcal's 2016 Global Sports Cities Index.

Goal 2 - Advocate for Destination Enhancing Development

Recommendation	Tactic	Actions Taken
Fully utilize regional assets to position Sarasota County as a national & international sports destination	VSC will, with the Sarasota County Sports Commission, submit bids for international events that can best utilize regional assets.	<ul style="list-style-type: none"> Placed ad campaign in SportCal, the premier international sports venue publication. Bid on World Rowing Championships in 2013 & hosted in 2017. Bid on UCI Supercross World Cup in 2014 & hosted in 2016. Bid on Modern Pentathlon World Cup and World Cup Final in 2014 & hosted in 2015-2016. Hosted 2016 World Biathlete and Triathlete in 2016. Hosted IBPC Dragon Boat Races in 2014.
Support development of additional outdoor recreation opportunities	VSC will with Sarasota County government, State Parks and private entities such as Audubon Society to identify new or expanded eco-tourism & outdoor recreation opportunities using the Discover Natural Sarasota platform.	<ul style="list-style-type: none"> Expanded Discover Natural Sarasota. Worked with SEC to support EKKO tours through marketing grant.
Partner with the Sarasota County Arts Alliance to be more proactive in cultural tourism product development	VSC will engage and encourage the Arts Alliance to pursue opportunities for the development of new arts projects throughout the County.	<ul style="list-style-type: none"> Promoted May Theater Month in 2016 and Summer Stage in 2017. Led Arts Advertising Plans and Cooperative advertising opportunities. Partnered with Arts Alliance on projects such as a guide and a video promoting the arts.
Engage area colleges and universities as partners	VSC will work with the County's Colleges and Universities to maximize campus attractions and facilities as well as attract visitors to their campuses and events.	<ul style="list-style-type: none"> Worked with USF Hospitality and Tourism class to perform triage reviews of VisitSarasota.com. Participated actively on USF Hospitality Advisory Council. Supported USF by assisting in teaching topics in marketing classes.
Support efforts to increase hotel development	VSC will provide research data to public and private sector concerns that have an interest in appropriate hotel development in the County.	<ul style="list-style-type: none"> Witnessed more than 1000 newly opened or under construction rooms between 2014-2016. Provided input and assistance to encourage hotel development in the City of North Port.
Work with the Bradenton Area Convention & Visitors Bureau and appropriate airlines to add commercial flights into SRQ, TPA, PIE and RSW	VSC will take a more proactive role in attempting to secure additional routes into the region.	<ul style="list-style-type: none"> Provided airline advertising support program for SRQ. Placed Newark Airport Ad Campaign supporting service to SRQ and Sojern digital campaign. Worked with BACVB and other regional DMO's on Co-Op Advertising Campaigns to raise awareness of regional service. Thanks for the BACVB & VSC marketing support program, scores of new air service including low-cost carriers have been added to SRQ in 2017 & 2018
Engage Sarasota County and municipal governments to enhance aesthetics of the destination	VSC will work with area governments to encourage wayfinding signage programs and enhance entrances and the aesthetics of major thoroughfares.	<ul style="list-style-type: none"> Branded the water tower along I-75 gateway, and visible from Nathan Benderson Park, with Visit Sarasota County.
Support the continued maintenance and enhancement of the destination's waterfront experiences	VSC will work with area governments to elevate the Sarasota County beach experience to the highest possible level.	<ul style="list-style-type: none"> Supported and promoted \$21 million in improvements to Siesta Key Beach. Led the Sarasota Bayfront 20:20 to facilitate the redevelopment of the 42 acres of city-owned property on The Bay.

Goal 2 - Advocate for Destination Enhancing Development		
Recommendation	Tactic	Actions Taken
Provide expertise in the community discussion of a public meeting facility and, if developed, ensure that government provides adequate and appropriate funding for the sales effort to position the facility for success	VSC will serve as the community's resource for data and analysis regarding the feasibility and viability of a public meeting facility.	<ul style="list-style-type: none"> Organized and participated in community discussion regarding conference center at County Commission urging in October 2015. Provided community and government leaders with a conference center effort timeline from 1965 to present.
Anticipated Outcomes by 2020		<ul style="list-style-type: none"> Host national & international sports events on a regular basis Become recognized as a preferred meetings destination Provide enhanced visual & wayfinding aesthetics/signage to help signify that Sarasota County is a top destination Add two full service & three limited service hotels to the existing Sarasota County inventory

Goal 3 - Elevate the Visitor Experience through enhanced visitor services		
Recommendation	Tactic	Actions Taken
Encourage resident engagement in promoting Sarasota County	VSC will develop programs to utilize the passion of area residents to invite and welcome visitors to Sarasota County.	<ul style="list-style-type: none"> Created the "You 'Ota Visit" campaign in 2017. Facilitated Instagram social meet-ups. Wrote editorials for the Sarasota Herald Tribune on the value visiting friends and relatives (VFRs) have in our economy.
Utilize the Visitor Information Center and Visitor Information Vehicle (VIV) to deploy trained destination ambassadors	VSC will develop training programs designed to enable ambassadors to provide a superior level of customer service to visitors.	<ul style="list-style-type: none"> Developed Certified Tourism Ambassador (CTA) program with 786 participants. Added new stops to the VIV route on a continual basis. Provided continual tours/field trips for both VSC volunteers and chamber/merchant association volunteers.
Develop training programs to prepare residents to welcome diverse visitors	VSC will develop education and training programs for area residents to create a welcoming environment for visitors from around the world.	<ul style="list-style-type: none"> Assisted with the training of 1500 volunteers for World Rowing Championships. Deployed and utilized the Step Right Up Program in FY 14 - FY16
Continue to utilize technology in delivering visitor services	VSC will continue to monitor and deploy the latest technologies to attract & meet the needs of the travel consumer.	<ul style="list-style-type: none"> Added I-Snap to Visitor Center. Added a touchscreen to the Visitor Center at the UTC Mall and SRQ Airport. Utilized I pads to provide visitor information in VIV and Visitor Center. Began tracking visitor behavior through Arrivalist system in 2016.
Continue to make the online Calendar of Events the central source of information for destination events and enhance services with a centralized ticketing program	VSC will develop the region's premier source of event information and ticketing.	<ul style="list-style-type: none"> Programmed VisitSarasota.com/events to feature a robust set of signature events, community and large-scale events. Worked with web developers to transform the events calendar to match the latest trends in event content. Utilized SpinGo to allow the community-at-large to contribute to the events calendar
Anticipated Outcomes by 2020		<ul style="list-style-type: none"> Attract one hundred more residents to be ambassadors for Sarasota County <ul style="list-style-type: none"> Attracted 786 residents to participate in 2014 CTA visitor education program Increase visitation and visitor spending through engagement of authentic invitations from residents <ul style="list-style-type: none"> Visitor spending grew from \$869 million in 2014 to \$1.03 billion in 2016, an 18% increase.

Goal 4 - Increase investment into tourism promotion and development		
Recommendation	Tactic	Actions Taken
Increase public and private investment into tourism marketing	VSC will research, analyze and propose funding strategies to increase the destination's competitiveness.	<ul style="list-style-type: none"> Supported & advocated for the following product enhancements: <ul style="list-style-type: none"> YMCA Selby Aquatic Facility expansion to host international events BMX Bike Course construction Nathan Benderson Park Knight's Trail Gun Range Atlanta Braves Spring Training Complex Ed Smith Stadium Improvements
Work with FADMO on destination development initiatives and incentives on a statewide level	VSC will provide leadership for Statewide efforts to develop new ways to increase visitation to Florida and Sarasota County.	<ul style="list-style-type: none"> Served in leadership roles on statewide initiatives and organizations: <ul style="list-style-type: none"> Chair of Visit Florida 2017-18 Marketing Steering Council (V. Haley) Executive Committee of Visit Florida 2017-18 Board of Directors (V. Haley) Chair of the Visit Florida 2015-16 Industry Relations Committee (V. Haley) Chair of Visit Florida's 2016-17 Global Communications Committee Involvement in Visit Florida Global Travel Trade & Air Committee since 2015 (K. Defebo) Chair of Visit Florida 2013-2014 Meeting & Travel Trade Committee (K. Defebo)
Work with Destinations International and U.S. Travel Association on national tourism issues such as beach renourishment and visitor access to visas	VSC will engage both national and international trade associations in advocating for measures that will increase visitation to Florida and Sarasota County.	<ul style="list-style-type: none"> Worked with US Travel, US Department of State and China to reach an agreement to extend visa validity. Promoted the improvement of visa interview wait times in Brazil to under 30 days. Communicated the importance of inbound travel as a US export.
Anticipated Outcomes by 2020		<ul style="list-style-type: none"> Increase public & private investment in VSC to at least \$10 million <ul style="list-style-type: none"> Reached a peak in FY 2017 of \$7.02 million in funding for VSC. TDT promotion funds have been reduced twice both with VSC Board approval Create development incentives that spur destination defining developments Sports grants have grown economic impact of sports from \$35 million in FY2014 to \$171 million in FY 2016 Added meeting incentive grant programs to grow meetings business Pursue state and national tourism priorities that reflect Sarasota County's needs <ul style="list-style-type: none"> VSC participation in Visit Florida in particular has ensured the availability of promotions to benefit Sarasota County

Outcomes & Indicators of Success

Area	Outcomes
VSC rebranding, sales and marketing efforts	<ul style="list-style-type: none"> FY 2014 - 28% of visitors to Sarasota noticed messages about Sarasota and of those 53% were influenced by those messages to come to Sarasota FY 2018 - 60% of visitors to Sarasota noticed messages about Sarasota and of those 76% were influenced by those messages to come to Sarasota Rebuilt website to drive business in the form of referrals from VSC website to local businesses which increased by 191%: <ul style="list-style-type: none"> CY 2015 Unique website referrals to area businesses 179,639 CY 2015 Unique website referrals to area businesses 523,982
ROI on advertising spend	<ul style="list-style-type: none"> FY 2015 ROI for every \$1 dollar of VSC marketing generated \$603 in visitor spending FY 2018 ROI for every \$1 dollar of VSC marketing generated \$520 in visitor spending FY 2015 visitors in paid lodging 1,084,140 FY 2018 1,220,900 FY 2015 visitor direct spend \$947 million FY 2018. \$1.195 billion FY 2015 first time visitor to SC 36% FY 2018 29% FY 2015 meeting & group leads 106 FY 2018 113 2015 Meeting & Group Incentives used: 2 FY 2018 27
Diversification in visitor types: International	<ul style="list-style-type: none"> US Airtours - Invested \$9,000 in 2018; \$9000 in 2017 <ul style="list-style-type: none"> The room nights with US Airtours have grown year on year for the past three years. 2016: 605 nights, 2017: 720 nights and 2018: 730. 2018 saw a smaller level of growth during a difficult year of trading in the UK but Sarasota bookings we're still on the increase whilst other Florida beach destinations stayed the same year on year. We continue to invest with this operator. Ocean Holidays - Provided no marketing support in FY17 or 18, but VSC hosted a FAM in 2018. <ul style="list-style-type: none"> Sarasota performed 35% up in 2018 vs 2017. Sarasota is seen as a destination with huge potential as numbers have been increasing even without marketing investment last couple of years. Agents from Ocean visited the destination in 2018 and it is believed this helped drive sales. America As You Like It - 2018 investment \$5,100; 2017 investment \$5,100 <ul style="list-style-type: none"> Sarasota outsells most other Gulf coast destinations and some east coast destinations as well. It suits the AAYLI clientele as they are less affected by economic and political factors and remains a strong destination in the State. We continue to invest with AAYLI. Funway - 2018 Invest: \$8,950; Hosted a FAM in 2017 <ul style="list-style-type: none"> Sarasota is performing 7.2% up 2018 vs 2017. Forward bookings are currently pacing 16.4% up. Virgin Holidays - No 2018 investment; 2017 investment: \$9,500 <ul style="list-style-type: none"> Sarasota is performing 3.1% up year on year.
Diversification in visitor types: Sports	<ul style="list-style-type: none"> FY14 Sports: <ul style="list-style-type: none"> 71 Events \$80 million impact to Sarasota County 71,419 room nights FY18 Sports: <ul style="list-style-type: none"> 114 Events \$97 million impact to Sarasota County 81,885 room nights

Outcomes & Indicators of Success	
Area	Outcomes
Website (drive traffic to www.visitsarastoa.com)	<ul style="list-style-type: none"> • Pageviews <ul style="list-style-type: none"> - FY18 4,782,595 - FY15 4,620,092 (up 3.52%) • Average Time on Web Site <ul style="list-style-type: none"> - FY18 00.01.15 - FY15 00.00.49 (up 52.61%) • Web Bounce Rate <ul style="list-style-type: none"> - FY18 35.80% - FY15 39.81% (Down 10.06%)
Public Relations generated media impressions directly from VSC efforts (This counts digital, print and broadcast)	<ul style="list-style-type: none"> • Total Media impressions from VSC efforts in FY 2014 were 69.4 million • Total Media impressions from VSC efforts in FY 2018 were 1.367 billion



Stakeholder Survey Results

Visit Sarasota County

Destination Strategic Plan

Summary



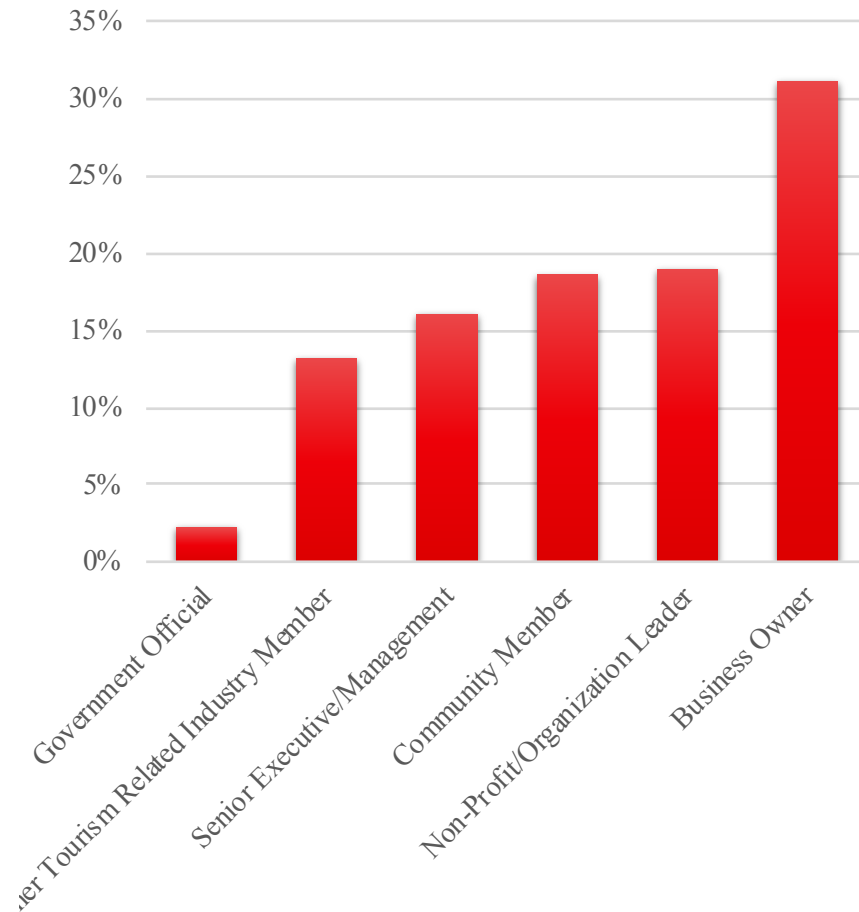
- Survey Results
 - 343 submissions
- Responses by Source
 - Partner Database – 260
 - Virginia's Column – 38
 - Chambers and Districts – 30
 - Staff – 15
- Survey was open from June 28-September 14

The following are outcomes from the stakeholder responses.

Respondent Breakdown



I am a:



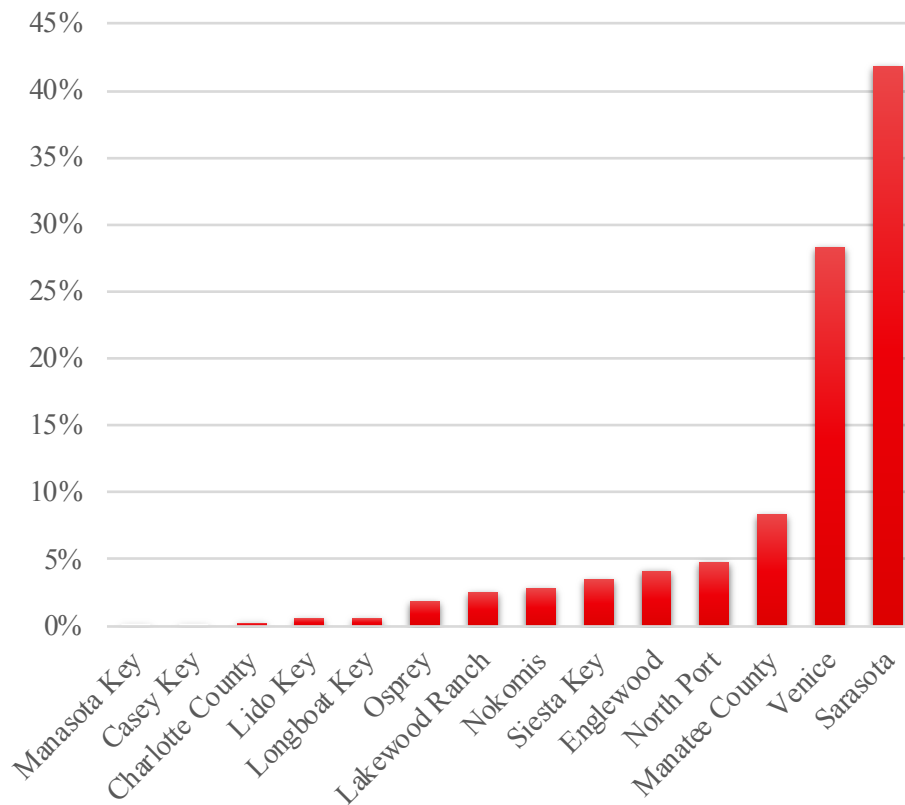
Please select the industry that best matches your business. Please choose only one.



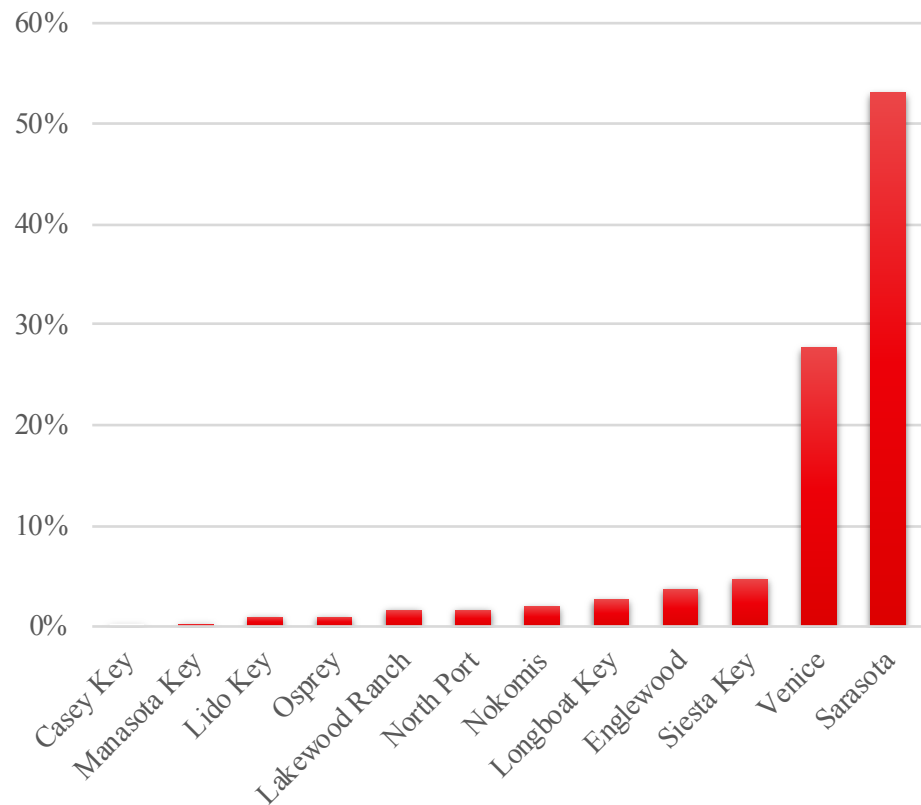
Community Affiliations



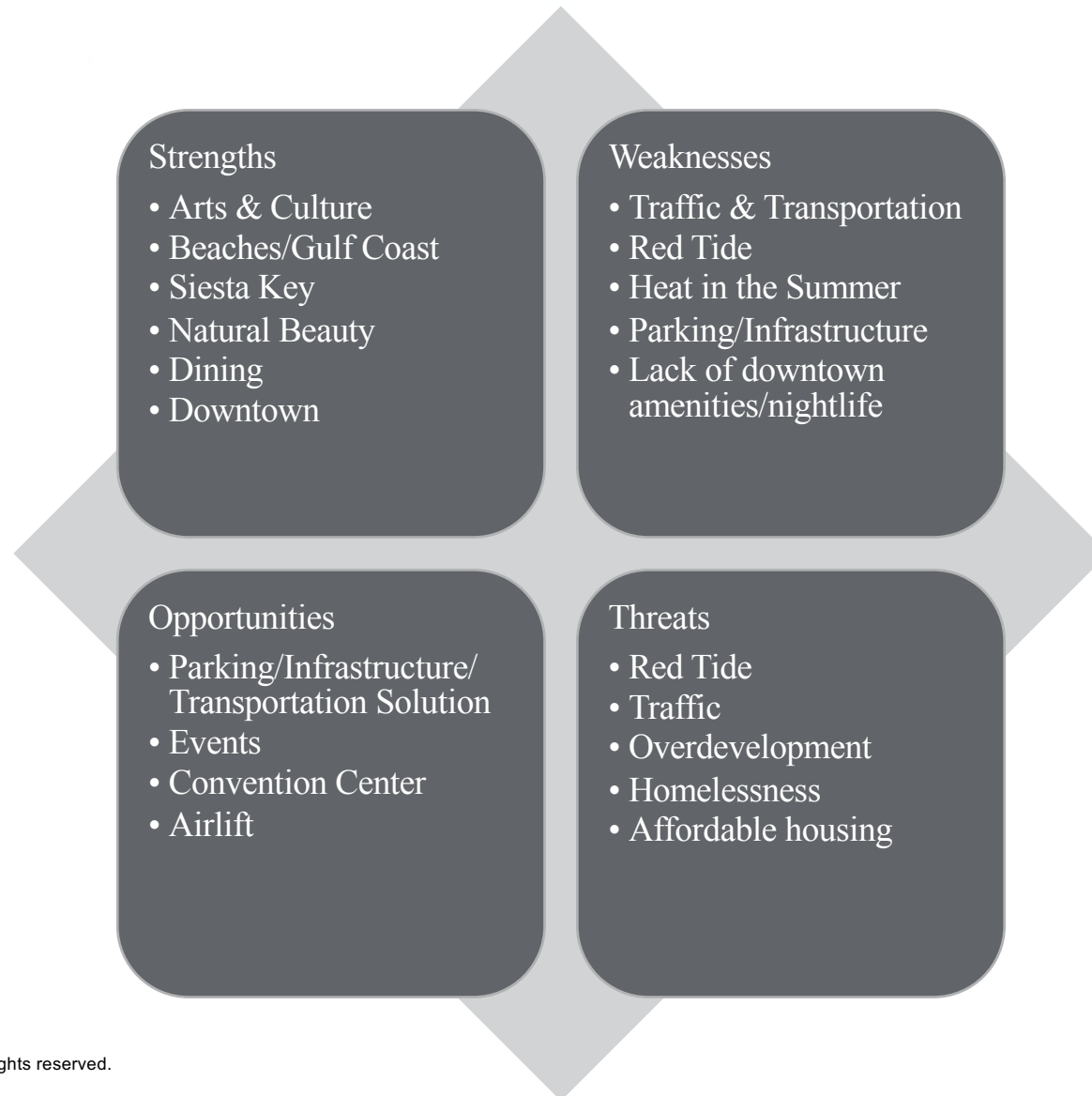
Please select the community where you live:



Please select the community where you work:



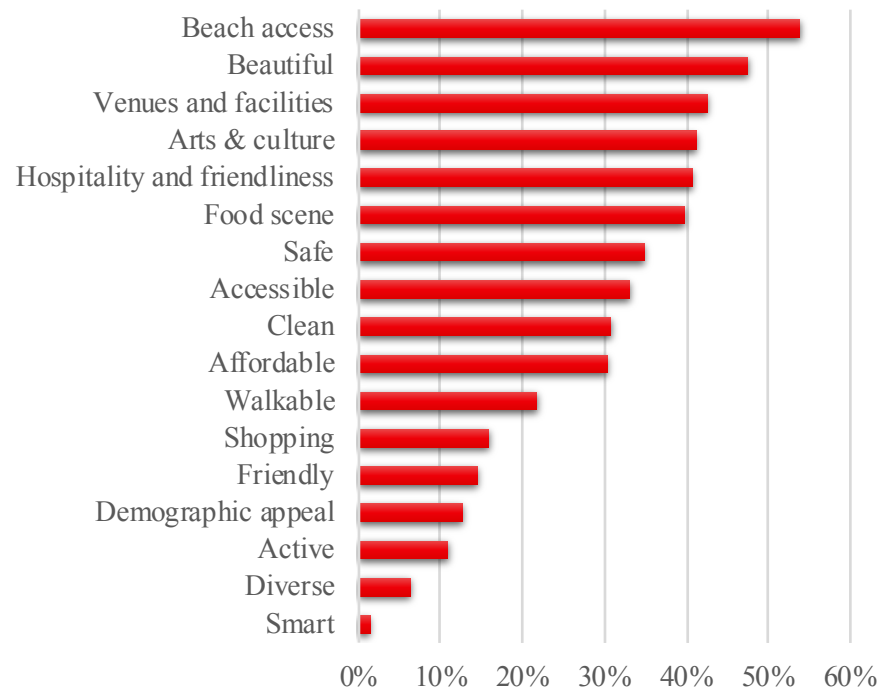
SWOT



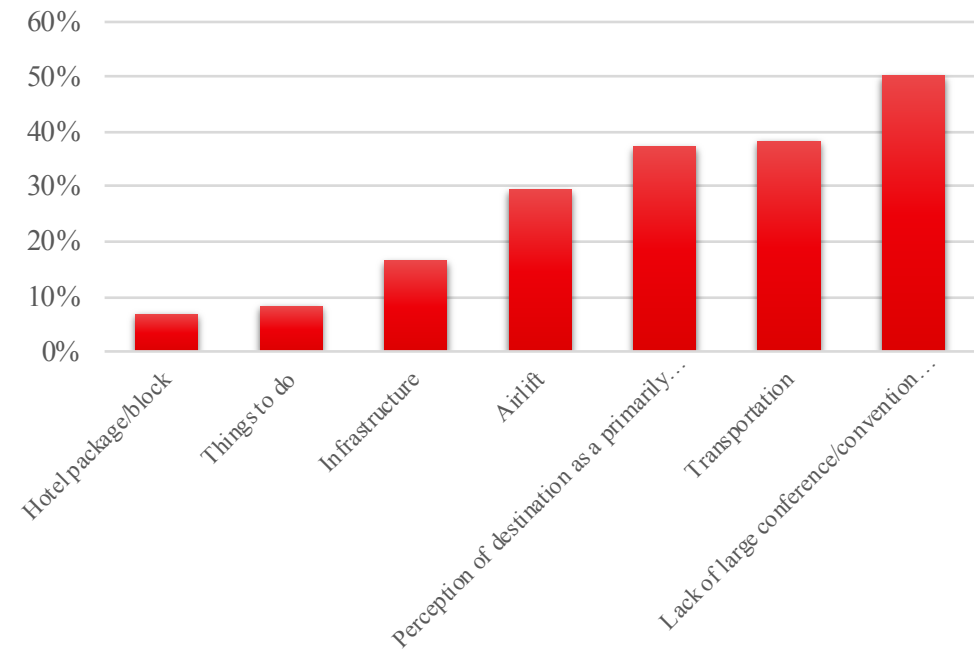
Meetings & Conventions Perceptions



What are the attributes of Sarasota County that could make it appealing as a meetings and conference destination? Pick your top five.



What real or perceived issues do you feel make Sarasota County less appealing for potential attendees of meetings and conventions coming to our County? Please pick the top two in your opinion.

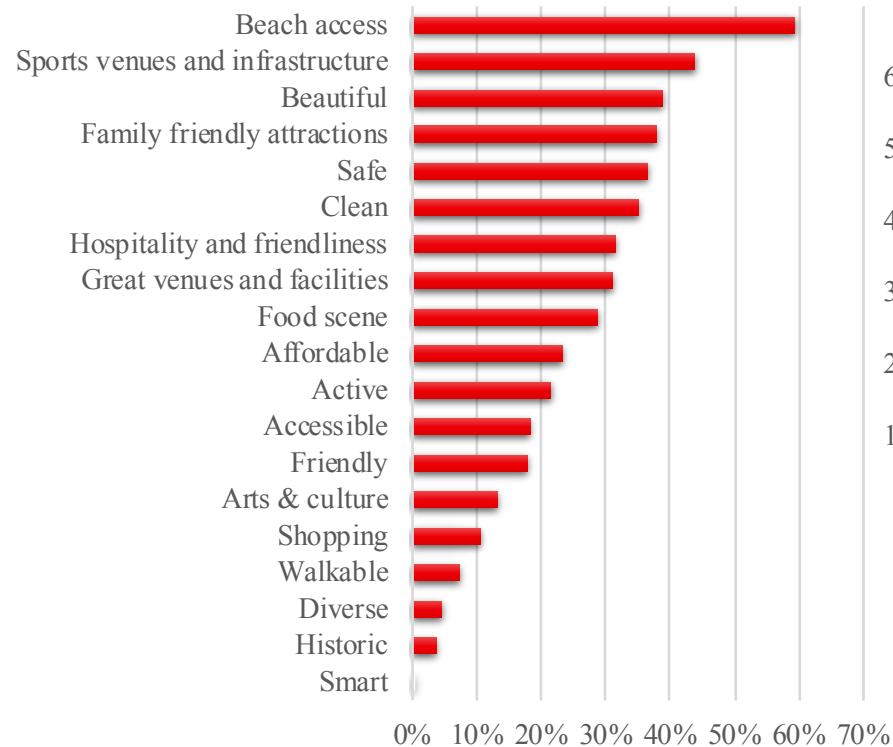


Sports Perceptions

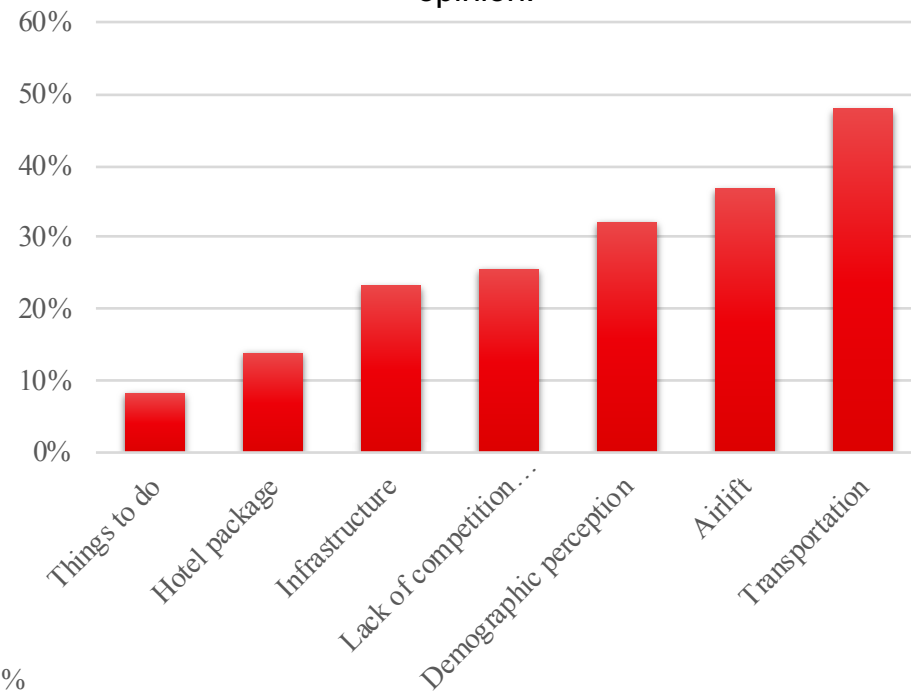


Respondents rated Sarasota County's Sports facilities and amenities as 3.5 out of 5 stars.

What are the attributes of Sarasota as a sports destination that make it a good place for visitors? Pick your top five.



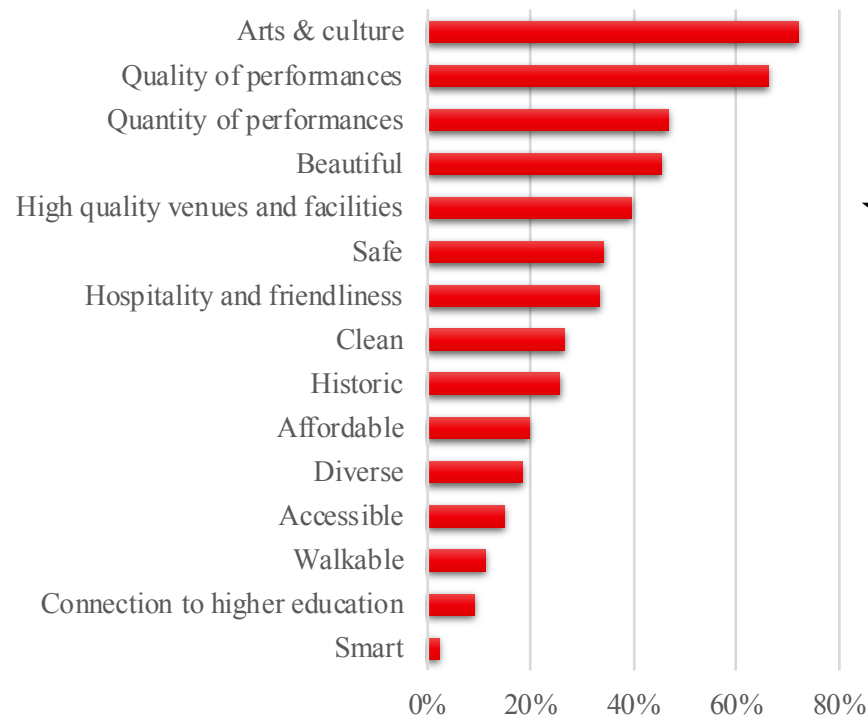
What real or perceived issues do you feel make Sarasota County less appealing for potential attendees of sporting events/tournaments coming to our County? Please pick the top two in your opinion.



Cultural Perceptions



What are the attributes of Sarasota as a cultural destination that make it a good place for visitors? Pick your top five.

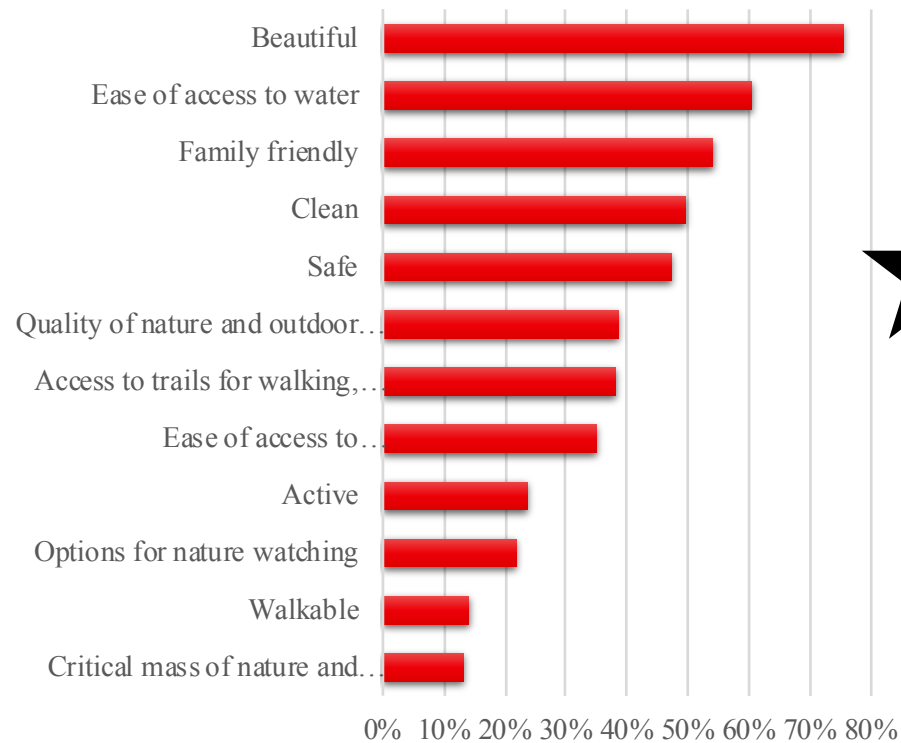


Respondents rated Sarasota County's Cultural offerings and amenities as 4 out of 5 stars.

Nature Perceptions



What are the attributes of Sarasota as a nature destination that make it a good place for visitors? Pick your top five.

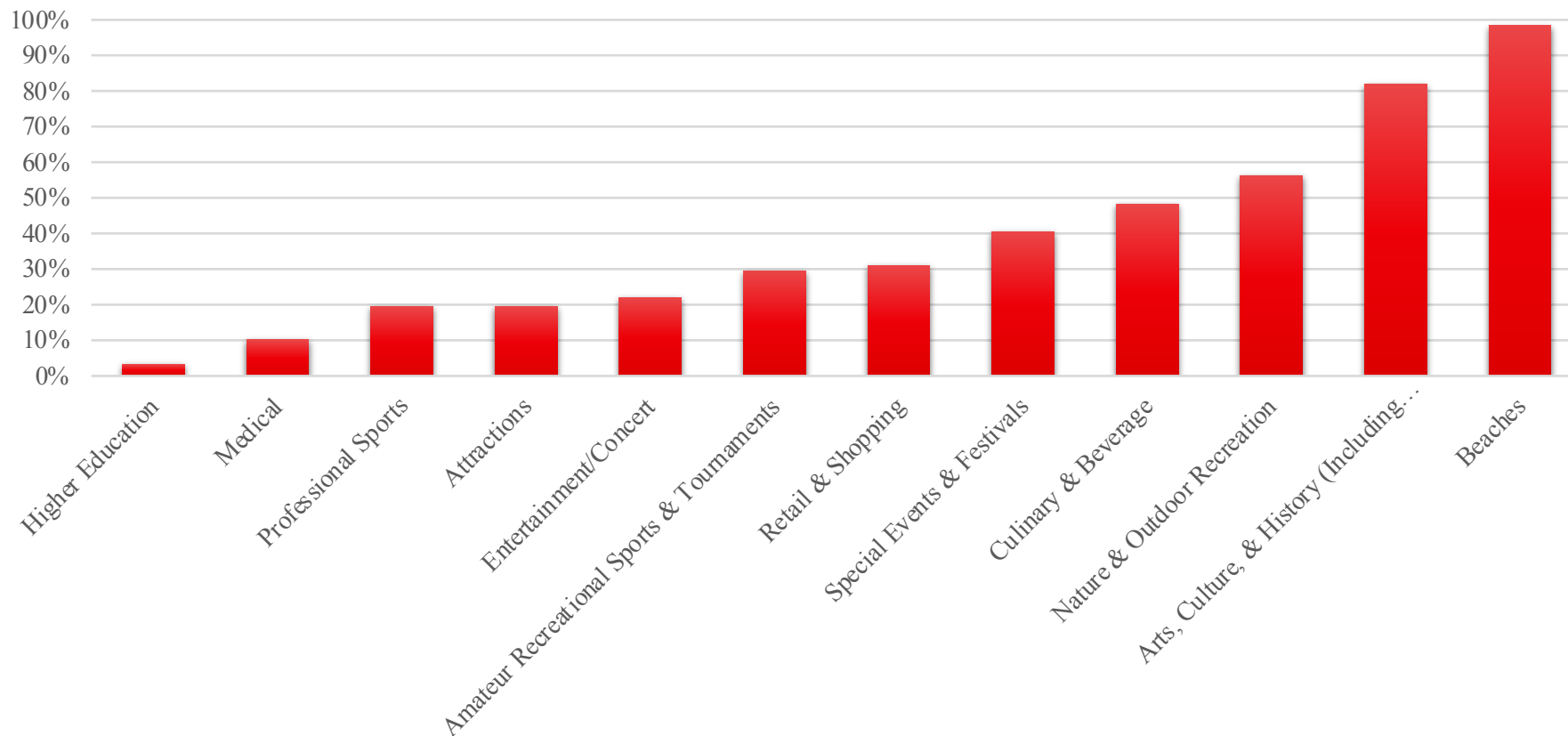


Respondents rated Sarasota County's nature offerings and amenities as 4 out of 5 stars.

Current Demand Drivers



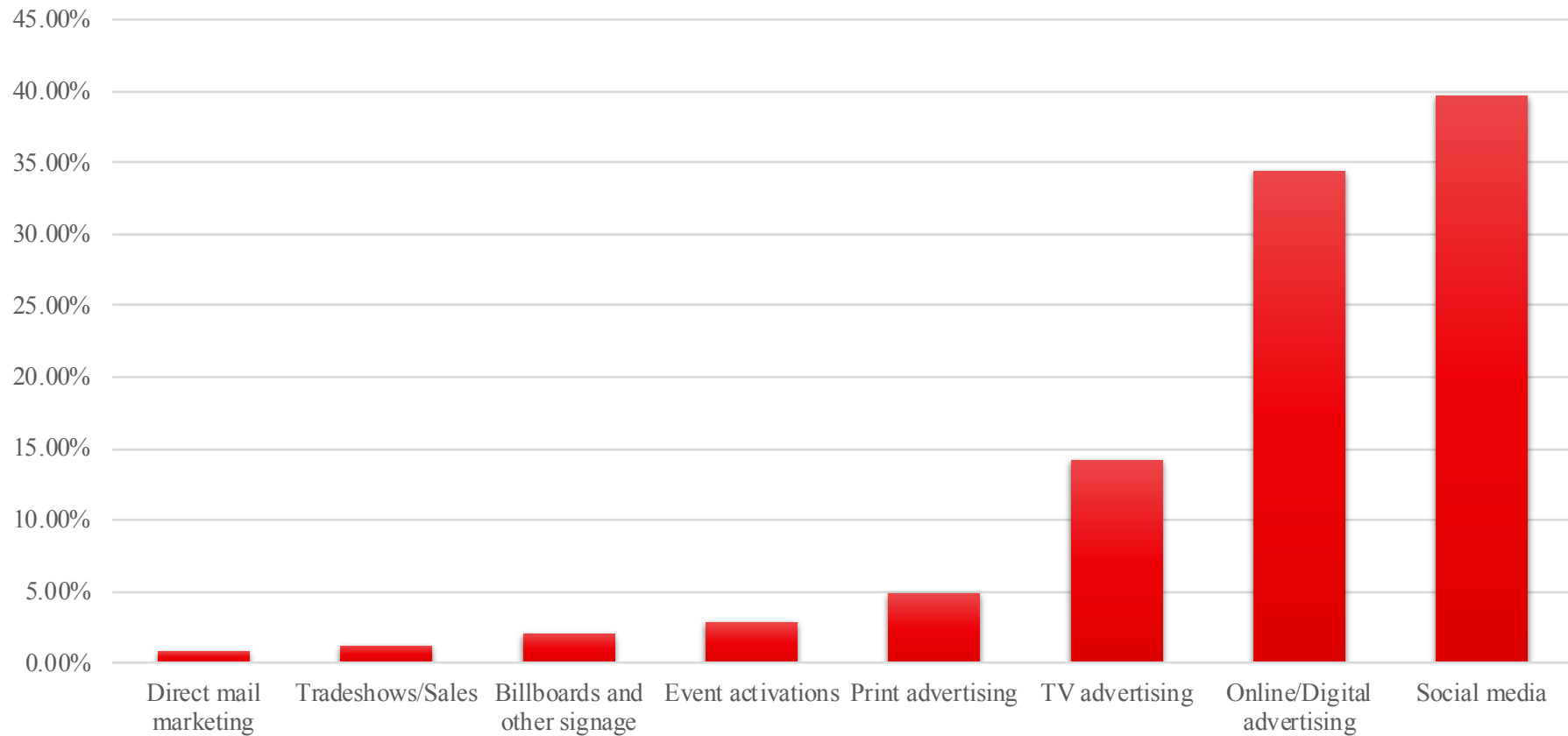
The following list includes various drivers of tourism to Sarasota County. Based on your perceptions of their appeal to potential visitors, please select what you feel are the top five drivers.



Marketing Vehicles



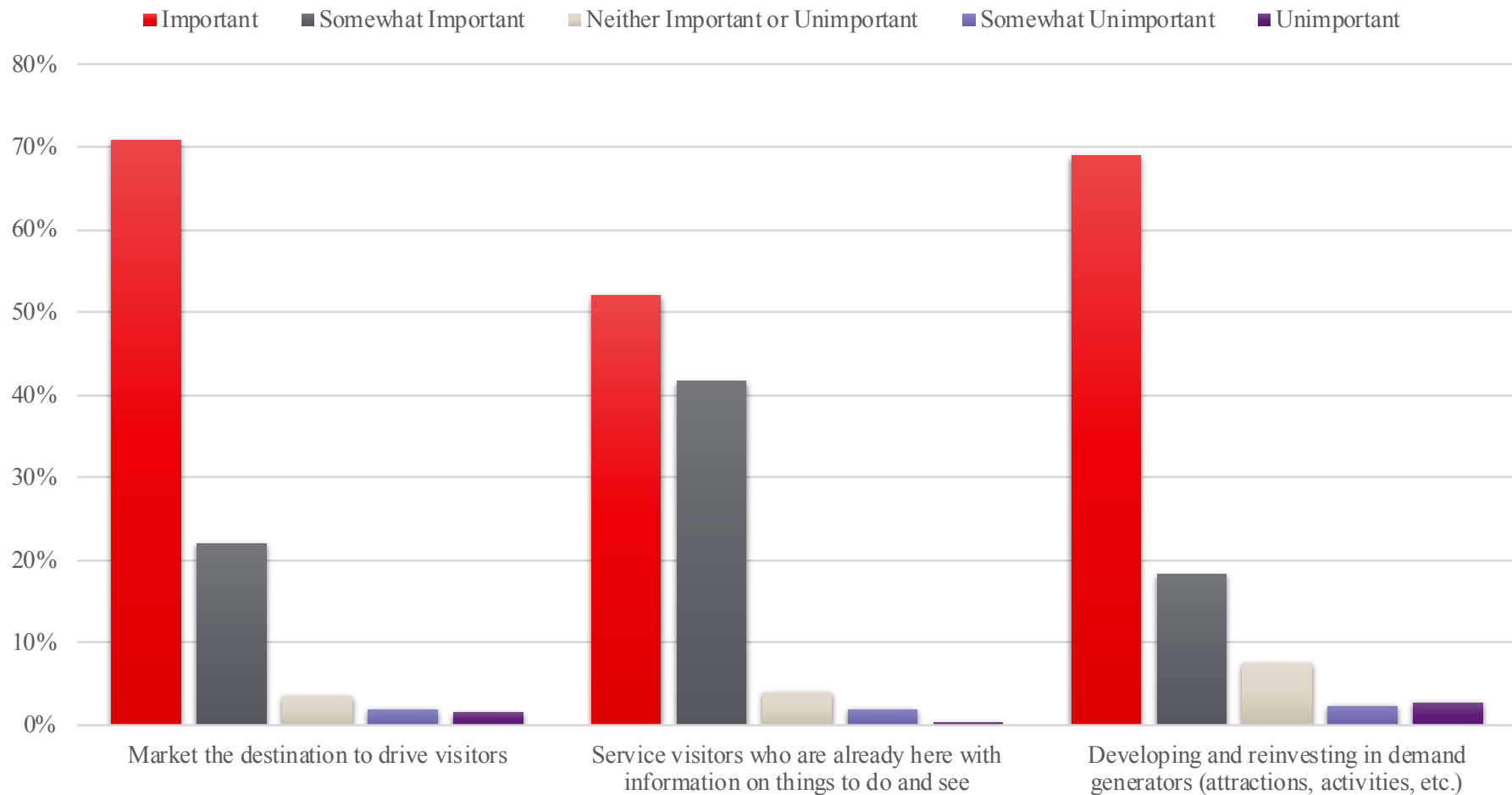
What do you think is the most effective vehicle to reach potential visitors?



TDT Perceptions



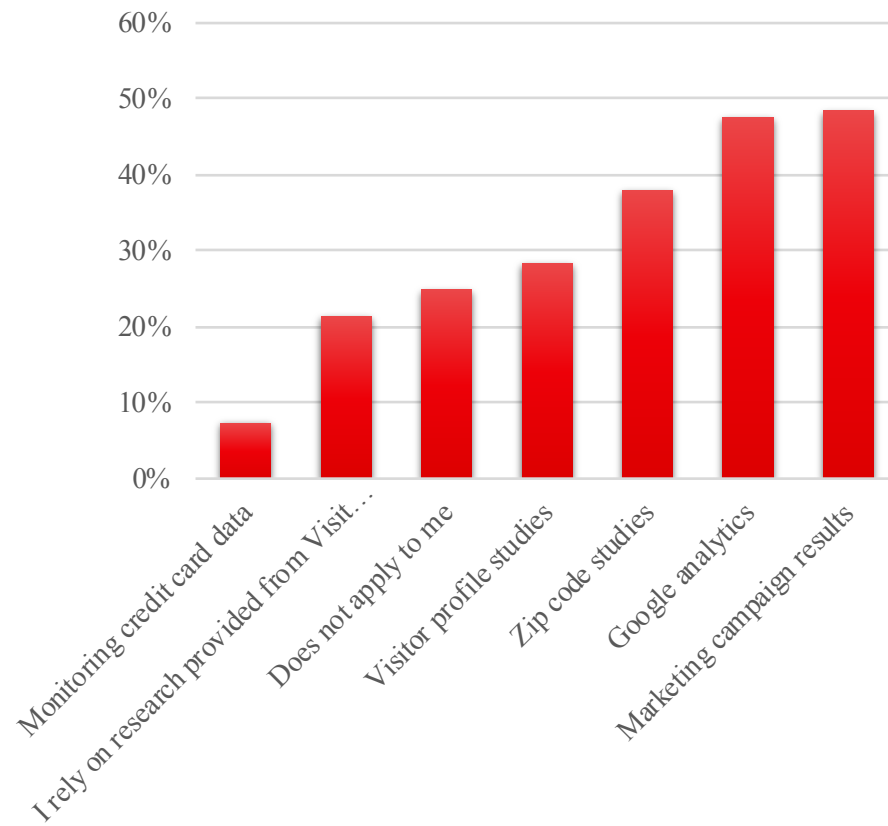
How important is it for Tourism Development Tax to do the following:



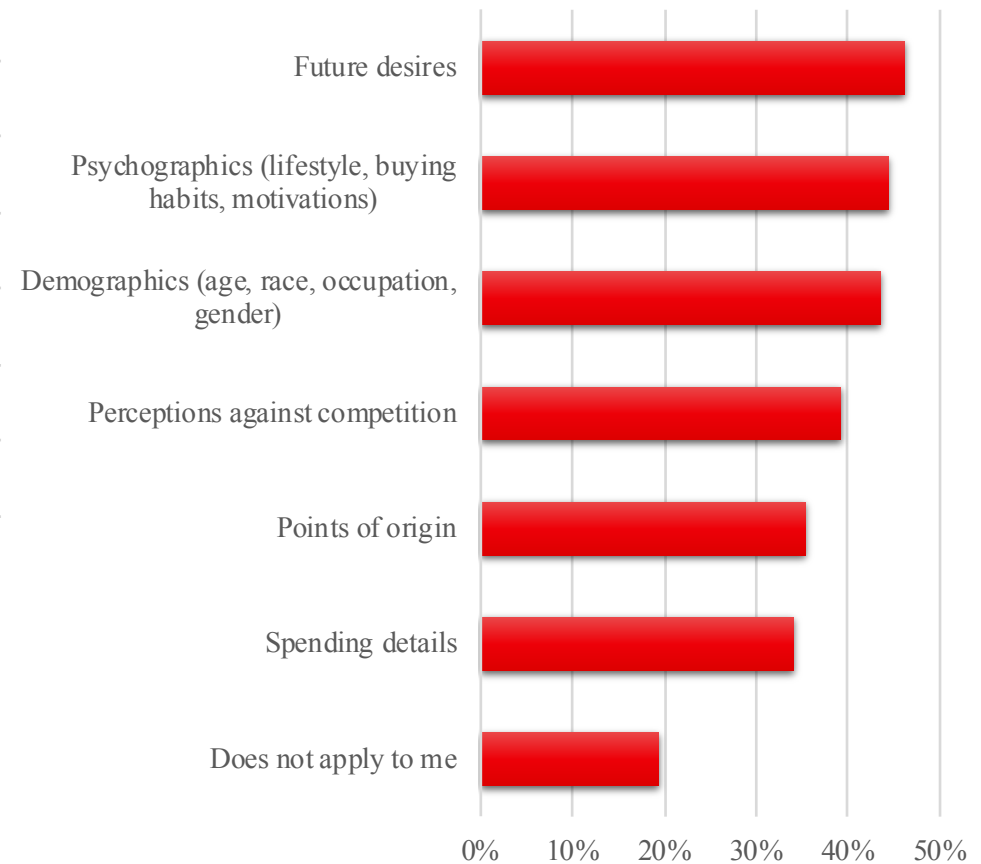
Research



What research do you conduct to learn more about your customers?
(Select all that apply)



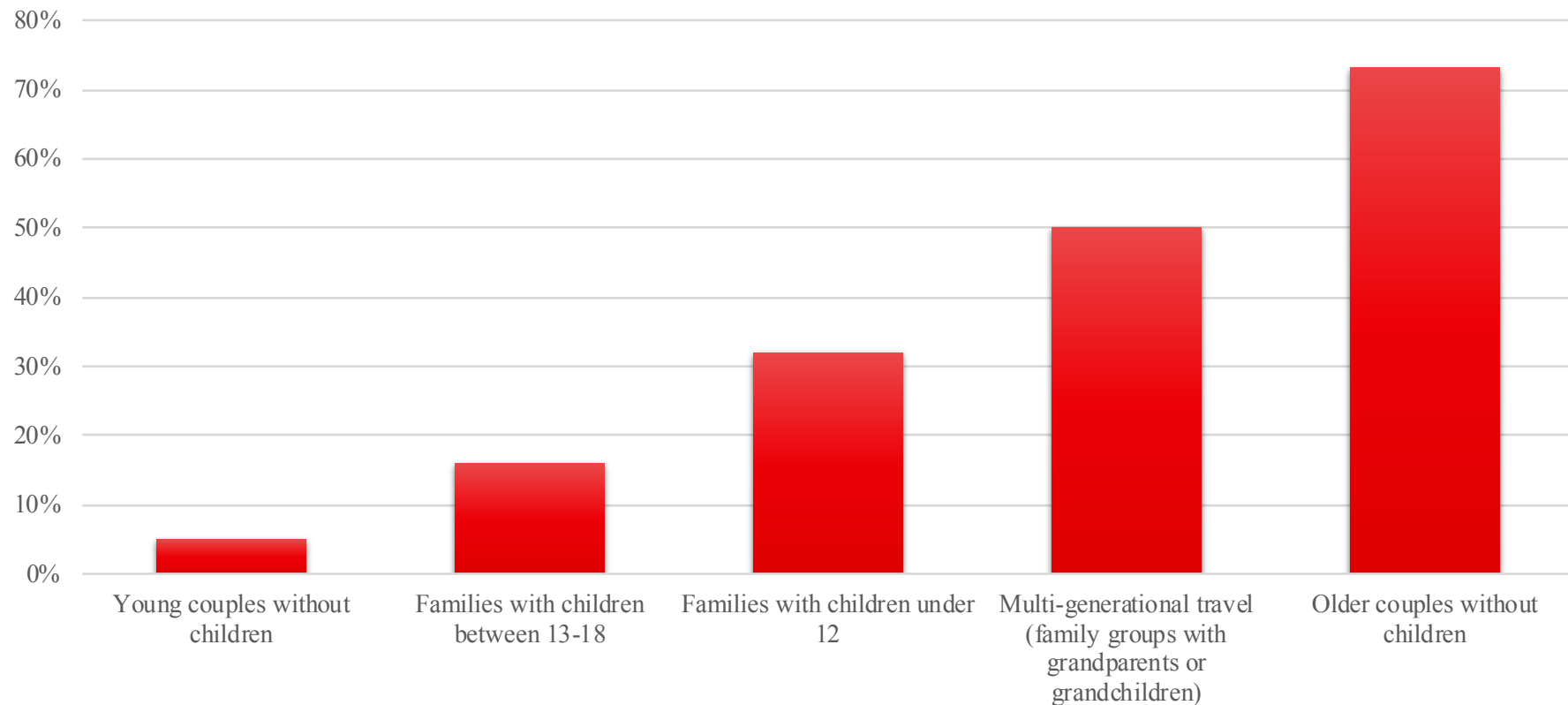
What more do you want to know about your customers? (Select all that apply)



Visitor Perceptions



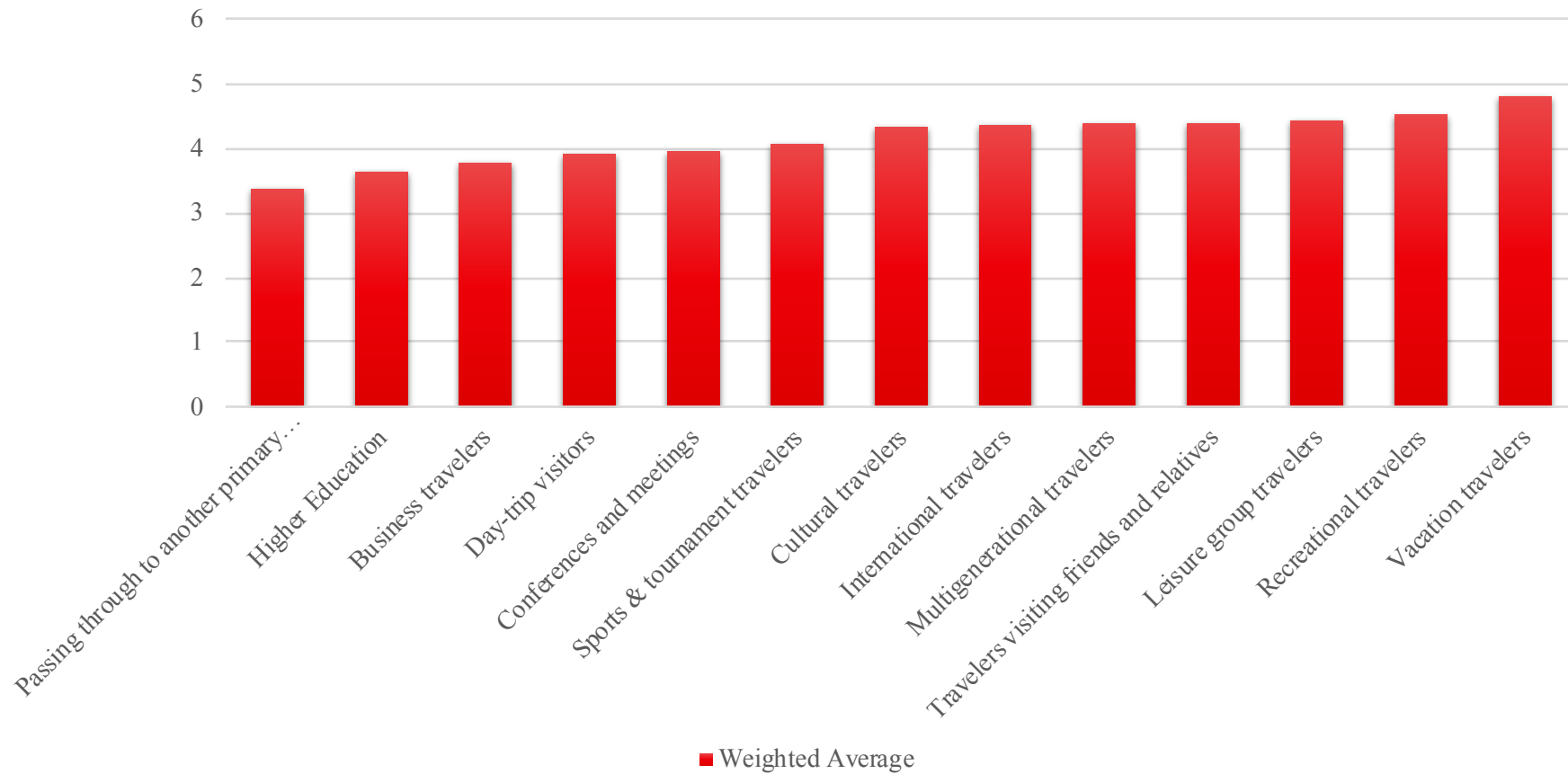
What are the top demographics of leisure/vacation travelers coming to Sarasota County? Please choose the top two.



Visitor Perceptions



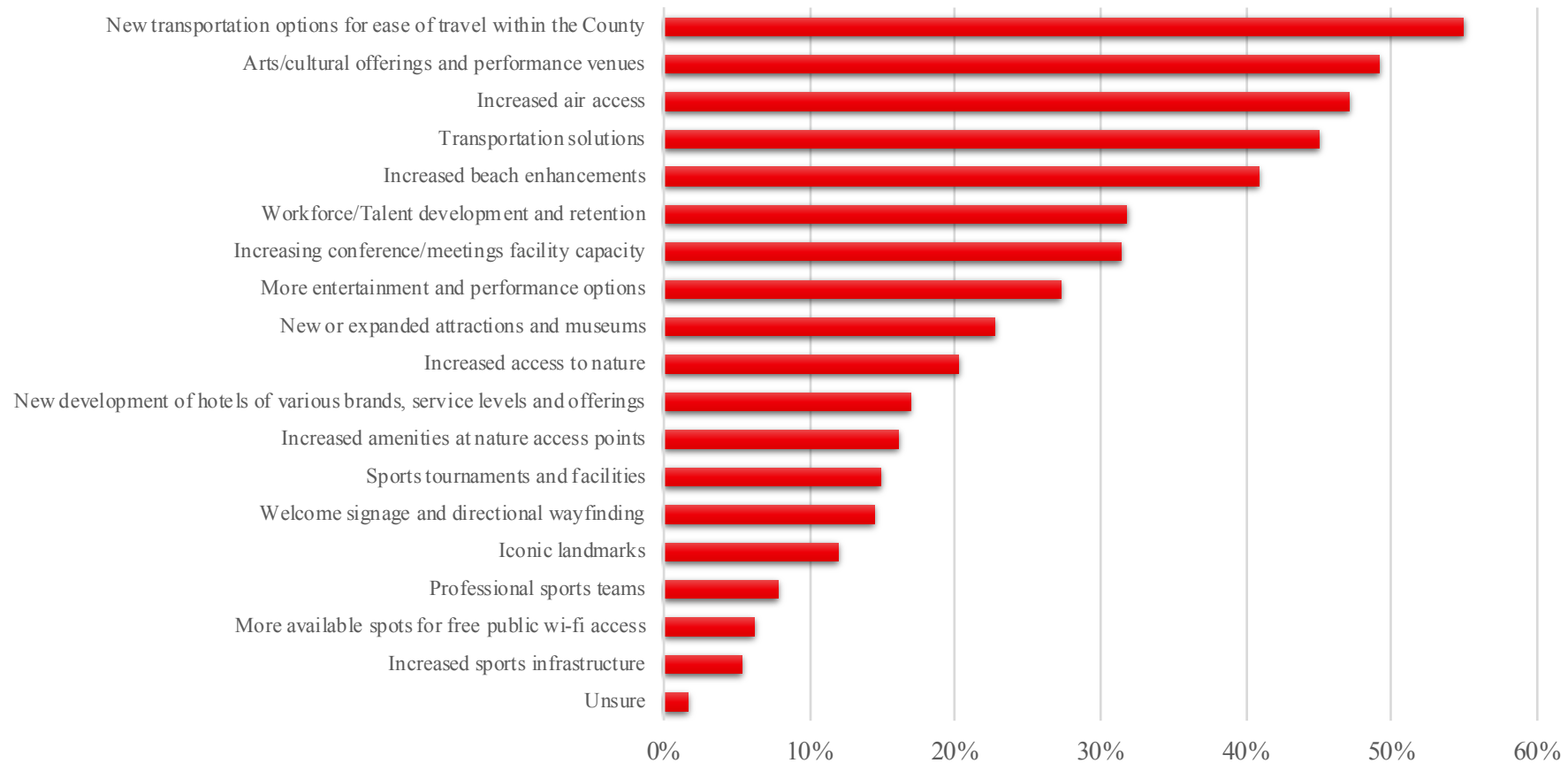
Based on your perceptions, please rate the importance of each of the following visitor markets for Sarasota County:



Investment Priorities



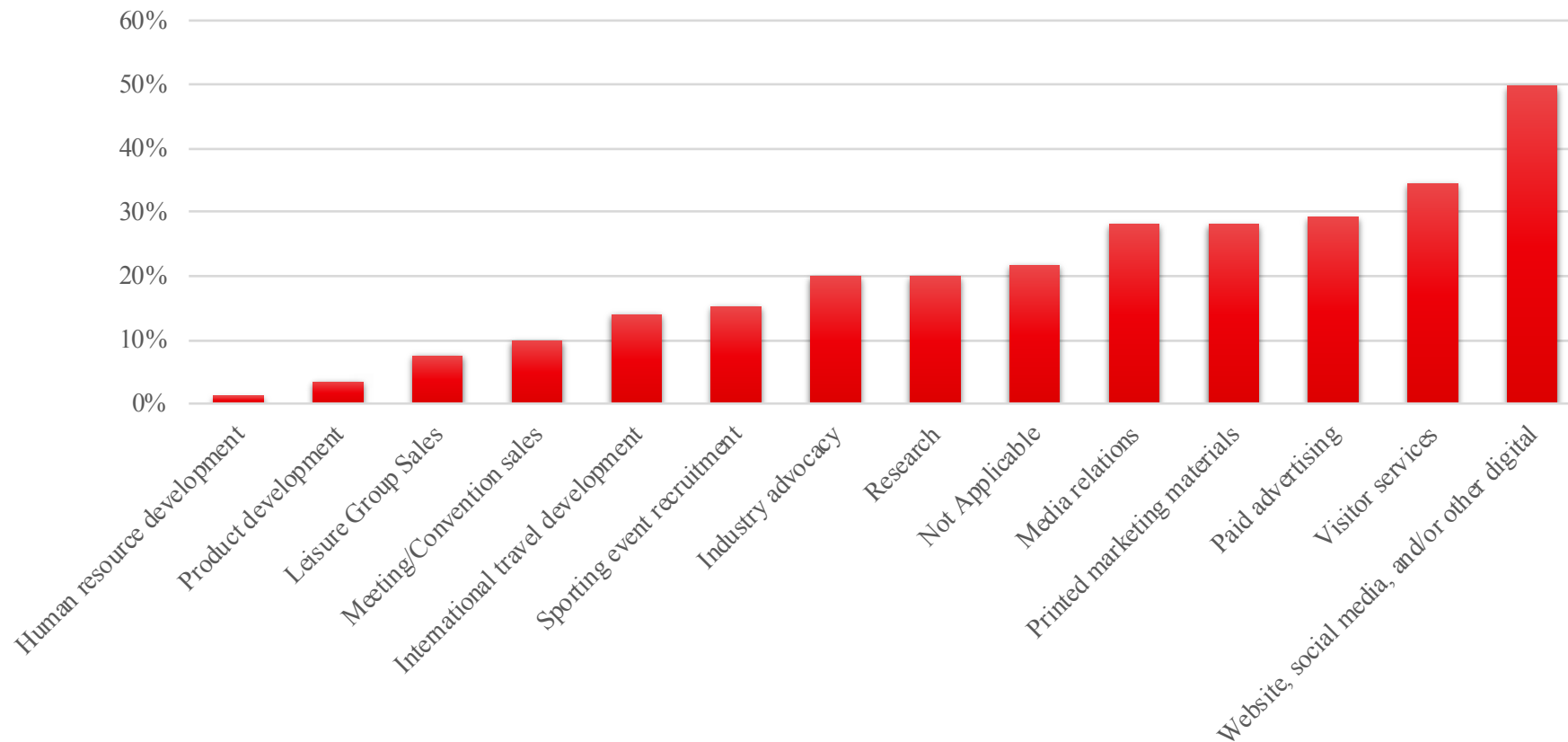
What do you feel should be Sarasota County's future investment priorities for continuing the tourism industry's positive momentum and attracting visitors during need periods? Please select your top five.



VSC Impact



Please select any VSC program that has directly benefited your business or organization:



Summary Considerations



Survey results align with much of the feedback received to date.

- Biggest surprise was the arts and cultural component scoring higher than the beaches as the strength.
 - Opportunity to diver deeper into this aspect
- Stakeholders understand the threats and impacts of natural issues
 - Red tide
 - Hurricanes
 - Opportunity and interest in diversifying product offerings
- Investment opportunities
 - Transportation
 - Arts and culture
- Stakeholders are interested in learning more
 - VSC investment in research is valuable

Attractions vs. Attractors Scale for Implementation

Sample Attractor Point Scale								
Site Points Available	Iconic Design 10	One-of-a-kind Offering 10	Event Opportunities 10	Engaging Visitor Experience 10	Venue Capabilities 10	Specific Target Audience 10	Future Unique Development 10	Overall Attractor Number 10
Site								
Distinguishing Notes:								
Options moving forward:								
Site								
Distinguishing Notes:								
Options moving forward:								

Event Matrix

Components	Fail	Poor	Average	Above Average	Excellent	Total Points Awarded
Point Allocation Maximum = 5 points per component*	1	2	3	4	5	
Program Components						
Tourism Promotion impact (room nights)						
Benefit to the Destination						
Unique/Selling Point						
Evidence of Partnership						
Organizational Structure & Management Capability						
Economic Impact						
Quality of Research						
Suitable Target Market						
Comprehensive Marketing Approach						
Evaluation/Measurement Plan						
Scale of Project						
Total						
Maximum possible points = 55						0



About JLL's Hotels & Hospitality Group

JLL's Hotels & Hospitality Group has completed more transactions than any other hotels and hospitality real estate advisor over the last five years, totalling more than \$71 billion worldwide. Between negotiating the world's most extraordinary, enticing, and profitable property deals, the group's 350-strong global team in over 20 countries also closed more than 5,300 advisory, valuation and asset management assignments. Investors worldwide turn to JLL to shape their strategies, tailor their portfolios and maximize the value of their assets. We are recognized as the global leader in real estate services across hospitality properties of all shapes and sizes. Our expert advice is backed by industry-leading research. We apply our broad spectrum of hotel valuation, brokerage, asset management and consultancy services through every phase of the hotel lifecycle. We have helped more hotel investors, owners and operators achieve high returns on their assets than any other real estate advisor in the world. Whether you are looking for a hotel or you're ready to sell, we'll use our capital markets expertise, hospitality industry knowledge and global relationships to put the right parties together and execute a bespoke deal that exceeds your objectives.

To find out more, talk to [JLL](#).

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