

TOURIST DEVELOPMENT COUNCIL

2013 Strategic Planning Retreat

July 24, 2013

Executive Report



Facilitation services provided by
James C. Stansbury
Bradenton, Florida

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December 9, 2013

PREFACE

On behalf of the Hillsborough County Tourist Development Council (TDC) and the Board of County Commissioners (BOCC), I want to thank the industry leaders who assisted the TDC and its Long-Range Plan Committee in updating our Hillsborough County Long-Range Strategic Plan for Tourism Development and Marketing. The retreat, on July 24, 2013, in a deliberative process resulted in a renewed sense of collaboration to achieve the Mission and Vision statements that were adopted in 2002. The updated strategies and priorities are refined given the shifts in global business and national market dynamics over recent years. They reflect achievable actions that effectively use our limited tourist development tax and other resources.

The coordinated implementation of the updated strategies will guide the TDC and its private sector, non-profit and governmental partners in achieving sustainable growth in tourism in our community and the Tampa Bay Region. Such collaboration strengthens our strategic decision-making in a competitive economic environment.

The members of the TDC, as well as the County Commission, look forward to working with our partners in tourism and economic development. Our partnerships, guided by the updated strategies for Strategic Tourism Development and Marketing, will enhance our global and national competitive position through the Decade.

Sincerely,

Ken Hagan

District 5

Hillsborough Board of County Commissioners

*cc: Board of County Commissioners
Michael Merrill, County Administrator
Bonnie Wise, CFA
Rosemary Perfit, Senior Assistant County Attorney
Ronald D. Barton, Economic Development Department
Tourist Development Council Members*

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EXECUTIVE SUMMARY

The Tourist Development Council (TDC) invited tourism representatives from the Tampa Bay region to contribute to its 2013 Strategic Planning Workshop. Thirty-eight attendees from private, public and not-for-profit organizations participated in reviewing how the tourism industry and the TDC had changed since the last strategic planning effort of the TDC in 2008. Many contributed to the design of the workshop by responding to a pre-workshop survey asking their views on key dimensions of tourism in 2013.

One overriding conclusion of responses for the pre-workshop survey was the continued importance of four strategic themes which were imbedded in the 2008 Strategic Plan:

1. Economy and Infrastructure
2. Product Enhancement
3. Collaboration, and
4. Integrated Resources.

The overall response guided an agenda that embraced Visions for Regional Tourism and Action Ideas for attaining those visions.

The retreat participants supported the existing Mission and Vision statements, below, without modification.

Mission

To grow the local economy by positioning the Tampa Bay Region as a premiere destination in the global tourist and convention arena.

Vision

The global business and leisure travel market values the Tampa Bay Region as the best that Florida has to offer. It is an exciting urban area with great natural beauty and year-round recreation opportunities. It offers an array of the finest facilities, amenities, beaches and attractions, giving the visitor an unforgettable vacation experience.

The Facilitator, James Stansbury, who had led the last retreat in April 2008, consolidated the outputs of the workshop in preparing this report. For purposes of clarity and focus, he organized the excellent work accomplished into the following Vision Tracks. Selected Action Idea titles recommended for attaining these visions were listed with each track. Many more worthwhile actions were identified to pursue.

In 2018, Tourism in the Tampa Bay Region will be:

Collaborative – One Bay, one region, one message and one marketing plan; with

- A Unified Business Plan,
- An end to Piecemeal Marketing, and
- Coordinated Branding efforts.

Connected – Multi-modal transportation that links visitors to all regional assets;

- Bus Routes and Walking Tours,
- Way-Finding Signs, and
- Park Once, Visit Many Places.

Enhanced – Recognized domestically and internationally as a high quality destination;

- Package Assets Offered,
- Upgrade Systematically, and with a
- Social Media Information System.

Integrated – All scales, venues, themes and locales contribute to the quality of our visitor experience;

- Incorporate the Experiences of our Neighborhoods and
- Generate Multi-Thematic Programming.

Sustainable – Depoliticized, with cross-sector funding and good returns on investment;

- Keep the Rays Baseball Team in Region,
- Consider Tourism Improvement Business Districts, and
- Privatize and Depoliticize Funding.

The participating partners supported the refinement and reorganization of the past stronger planning efforts with the intent of reducing overlapping visions and ideas while emphasizing the most powerful ideas for moving forward. One fundamental change was the conversion of the four primary themes set in 2008, and used in this workshop from names to qualities. A second change split “Economy and Infrastructure” into two more distinctive and equally important themes, “Sustainable” and Connected.”

At the completion of the 2013 Strategic Planning Retreat, the consensus was that the next step must be engaging industry partners and workshop participants interested in achieving one or more of the strategies. The participants agreed that rather than spending part of the workshop in identifying specific projects, tactics and tasks for each strategy, the Convention and Visitors Bureaus along with County staff and other participants will reach out to industry members who want to realize an objective and can contribute to the implementation steps and the resources to attain the objective.

BACKGROUND

The Tourist Development Council (TDC) invited tourism representatives from the Tampa Bay region to contribute to its 2013 Strategic Planning Workshop. The workshop was held at the Tampa Bay History Center and hosted by the Hillsborough County Economic Development Department.

Thirty-eight attendees from private, public and not-for-profit organizations participated. Together, they reviewed how the tourism industry and the TDC had changed since its last strategic planning effort in 2008. Many contributed to the design of the workshop by responding to a pre-workshop survey asking their views on key dimensions of tourism in 2013.

One important result of those responses was the continued importance of four strategic theme/directions embedded in the 2008 Strategic Plan. The group agreed that the four directions provided a good platform from which to assess the strategic plan. The directions are:

- Economy and Infrastructure, addressing approaches to influence and adjust external constraints that participants cannot control internally, as well as mechanisms to enhance communication, share information and knowledge, fund tourism-related infrastructure and leverage revenue sources;
- Product Enhancement, enhancing customer experience and outreach and leveraging the assets of the Bay area through collaborative regional marketing;
- Collaboration how to work together as one industry with regional communication and promotional / marketing products that Bridge the Bay; and
- Integrated Resources, on how to integrate the full spectrum of assets.

The overall response guided an agenda that embraced Visions for Regional Tourism and Action Ideas for attaining those visions.

The Facilitator, James Stansbury, who led the Retreat in April 2008, and returned for the update, consolidated the outputs of the July workshop in preparing this report. For purposes of clarity and focus, the work was organized into four Vision Tracks. Workshop participants identified Priority Actions and Idea Titles for attaining these Visions Tracks. For each track, priority actions were included in this Executive Summary with supplemental actions ideas and work plans in the files of the Economic Development Department.

THE PROCESS

Advance Survey Guides Workshop Design

The Facilitator thanked everyone for participating, and building on the work accomplished in 2008. He described strategic planning as a continuous process that does not end. In 2008, the workshop at the John F. Germany Public Library produced four priority themes or directions that framed the strategic thinking of representatives of many tourism stakeholders. The pre-workshop survey had provided very useful information for designing the current workshop, including the validity of those themes.

The respondents contributed their assessments of what changes had occurred in tourism since 2008, what was successful, what still was missing, and what the day's workshop needed to accomplish to be viewed as a success. Those inputs allowed the Facilitator to design the workshop to make the best use of time in addressing the most important thinking. The attendees wanted to move forward with a collective vision, and the actions needed to attain it. The Facilitator set the tone and scale of the discussion session, "We need to be at the right altitude today, neither above the clouds where we can no longer see the realities on the ground, nor in the weeds where we cannot see the broader context of tourism in this region."

Workshop Team Process

The pre-workshop responses provided a clear basis for this workshop focus. The participants wanted to collaborate on a vision for tourism across the region, and to identify the unified actions necessary to achieve it. The Facilitator reviewed the teamwork that would generate visions and action ideas for each of the four strategic themes to be carried forward from the 2008 conclusions.

The six pre-workshop questions, and the responses, listed below, recognized shifts in the environment and new emerging opportunities for collaborative efforts to bring the Tampa Bay region together.

Survey Question 1: How, if at all, has the tourism industry changed since 2008?

Negatives:

- Shaky times with the economy and British Petroleum oil spill in the Gulf of Mexico
- Much shorter booking cycles – rate and occupancy and declines in demand
- Media perceptions – punch lines
- Increased competition with other markets
- More cities offering free convention centers and meeting space
- Inflexible organizational structure
- Larger events require major selling efforts
- More vacations have become localized
- Disposable income has declined – there is a decrease in spending by visitors, who are budget-conscious and smarter, looking for value
- Heavy emphasis on financial and other incentives

Positives:

- Recognition that there is much more cooperation within our region and a shared focus on greater need for cooperation since the last retreat in 2008
- Speed at which you can change a community – good reviews/rankings
- Viable market image has improved immensely
- Sports market thrives, especially amateur and youth sports activities
- More incoming international travel
- Growing leisure transient occupancy
- Younger target audience, many without children
- Vacation-like amenities hold an advantage
- “Play-cation” opportunities modifying traditional family vacation
- Smaller venues remain important to overall success

Survey Question 2: *When you think about the future of tourism development in the Tampa Bay region, what are you most concerned about? What worries us?*

Collaborative Action

- Living up to our 2008 recommendations
- CVB CEO’s talking more, and continuity of all working together

Economy and Competition

- Our recent growth gains reduced by big Summer drops
- Other markets out pacing us with new (or free) facilities, complexes, sports facilities
- Cruise ship guests have nothing to do at this port of call
- Downtown amenities and enhancements

Support

- Budgets not competitive
- Funding and sales staff needed
- Tourist transportation options
- Lack of incentives for marketing

Survey Question 3: *When you think about the future of tourism development in the Tampa Bay region, what are you most optimistic about? What excites us?*

Attractions

- Increased attention to cultural tourism
- We have much to offer—the arts, beaches, sports, entertainment, museums, aquarium, MOSI, the Lowry Park Zoo, climate and a great airport
- Recent downtown enhancements (including museums, parks and restaurants)

Collaboration

- The level of cooperation between the private sector and government as well as the cooperation between the Counties
- Our organization's ability to do more with less and continually win the business
- "The hospitality mindset" to collaborate and make Tampa the top of the list

Trends

- "Breaking out" with our new image and brand
- A renewed interest in travel and discretionary spending
- Increasing visits to Florida and to our region
- Increasing international flights

Survey Question 4: ***What is our most important 2008 Strategic Plan accomplishment and what have we not accomplished to date?***

Key Results

- Developing the Tampa Bay Brand
- Great emphasis on collaboration between the CVBs, Counties, organizations
- We continue to attract more sports business to the community
- Tampa has focused on downtown improvements that have positive impacts
- The huge international RNC event was flawlessly held in our community, and International Indian Film Academy is planned in 2014
- Funding accomplishment was critical to where we are now

But less success with:

- Tampa Bay Tourism Initiative, Google Earth, Virtual Concierge, Urban Beach Branding
- Improving transportation to better service incoming groups and land future
- Riverwalk initiative needs to develop more quickly
- Downtown amenities and attractions, protection of TDT funds, joint regional marketing initiatives

Survey Question 5: *If you could change one aspect of the plan today, what would it be?*

Strategic Plan Document

- More focus on forward thinking elements such as increased event innovation
- Less concentration on the tactical elements related to sports—we do those anyway
- More realistic — back up new “initiatives” with the professional staff to make them happen
- Make it a real working document—connect to target economic development goals and funding
- Innovate and create more funding so we have greater resources to provide incentives
- Greater emphasis on including funding opportunities for business incentives
- More dollars assigned to marketing the entire Bay area
- Transportation
- A greater emphasis on transportation connections: “Park once and go anywhere”
- Push transportation improvements

Survey Question 6: *Are the 2008 Plan’s Major Themes still fundamental to our planning for the future?*

Should we continue with the 2008 Themes?

- Yes – Economy/Infrastructure, Product Enhancement, Collaboration, and Integrated Resources continue as our strategic framework

How do we measure the Workshop Success?

- A clear, defined plan with an achievable vision with next steps (action plan) and definitive specific objectives;
- A plan that the majority in the industry can support and can also be supported by our legislature and local government bodies;
- Establish real, honest and attainable goals and work together to accomplish them;
- Being inclusive, not just talking “regional” and leaving important areas out of the plan
- Strengthen team of community stakeholders;
- A plan that refocuses on the new realities with an eye on future business development;
- Addressing the funding to compete on a more even playing field;
- We have an achievable vision and actions to accomplish it;
- We think strategically rather than tactically;
- We are inclusive by focusing on all areas, assets and markets;
- We cooperate across all areas and sectors of the region;
- We unify our vision and actions rather than allowing separate organizations and entities be obstacles;
- We think big and small at the same time;
- We find an entrepreneurial approach to tourism building, and
- We recognize the importance of continuity over time even as leaders and participants change.

After a review of the opportunities and challenges facing the industry in the Tampa Bay region, the participants organized into Teams to review the Four Themes: Economy/Infrastructure, Product Enhancement, Collaboration, and Integrated Resources. Worksheets were provided at two steps. In the first step, the groups evaluated the pre-survey results and assessed the changes in the external conditions that supported a change in strategy. In the second step, the members of each Team assessed a range of actions and then selected three or more actions which they deemed priorities. For the three or more priorities each Team drafted Action Worksheets.

For each Theme, the assessments, strategies and actions presented by the Team are summarized on the following pages. The supporting Worksheets with action details for the Themes are in the Appendix. They offer a framework strategy on how the partners may work collaboratively on projects to attain the vision.

VISION AND ACTIONS FOR THE FOUR THEMES

THEME ONE: VISION AND ACTIONS FOR THE TOURISM ECONOMY AND INFRASTRUCTURE

1. What has happened as a result of successful responses and influences on the regional economy and infrastructure?

- Regional approach has been established. Implementation of tourist transportation system, with emphasis on transit rather than cars, is well underway. We have better transportation linkages for visitors.
- Survey results show Tampa Bay is a top ten market for quality of life indicator (much flows from environment).
- Product continues to grow; facility upgrading is occurring and keeping them competitive.
- Community product is diversified.
- Events are utilizing all parts of the community.
- Riverwalk is complete with other key product developments.
- Tourism products are diverse, covering cultural, sports, conventions, festivals and more.
- Our first social media-based information system is well-designed and in place.
- Our urban cores link to neighborhoods and other satellite assets that complement our product.
- We have better incentive packages.
- We are more strategic about what we do, and have changed our thinking about who we are and what we offer.
- Better metrics guide business/ROI decision making.
- People understand the important role that hotel industry plays in economy.
- We are known for our ecotourism product and its regional scope.
- Historical/cultural products are enhanced and coordinated.
- More hospitality and non-hospitality businesses are collaborating.
- More public/private partnerships are leveraging segment objectives. Existing and new businesses are building our tourism brand.
- We now offer the cleanest, safest destination.
- The Rays team is in our region, long term.
- Parking inventory is appropriately scaled and walkability is enhanced.
- We have a recession-proof youth and amateur sport tourism platform.

2. What are the private, public and non-profit sectors doing differently today than in 2013 with the economy and infrastructure that has made us a model for other regions to emulate?

- More private sector relationships exist, including funding and corporate leveraging.
- Greater private/non-profit leveraging.
- New corporate citizens are better integrated into our tourism community.
- We plan, set objectives and coordinate our approaches, and have replaced fragmented “asks” with unified submissions.
- System “gaps” have been identified and a comprehensive approach for addressing them holistically has proven beneficial.
- Food and beverage tax is a new addition to our funding model.
- Our regional communities talk about investments needed for our future quality of life, not focusing on the money.
- We have restructured the Casino/Gaming arrangement.
- There is no need for a sixth cent.

3. Top Team Action Ideas

- Tourism Business Plan – Recession proof.
- Best Convention Center in U.S.--Social Media/Technology Platform.
- Tourism Transport - Infrastructure (Charter bus system).
- Define: Historic/Ecology/Cultural Plan and Tampa Bay.

THEME TWO: VISION AND ACTIONS FOR TOURISM PRODUCT ENHANCEMENTS

1. What has happened as a result of successful product enhancement throughout the region?

Infrastructure:

- We have developed our downtowns' retail, including restaurants.
- Channelside is improved, and the Cruise Terminal has onshore tourist assets and links to downtown and other venues.
- Funding is in place.
- Convention Center upgrades are occurring on a scheduled basis.
- Formerly blighted arterial roads are beautified.
- Downtown is attractive and vibrant with activity after dark.
- Events are bundled to offer entertainment, sports, Medifuture, etc.
- Riverwalk is fully developed and is being enjoyed with its shaded environment.

Transit

- New funding is supporting improved connectability for tourists and residents.
- Our tourism assets are connected by new hubs and links.
- Direct flight-airlines routes are bringing more domestic and international visitors.

Message

- We maintain a unified front in representing the Tampa Bay Region to the world.
- There is a national and international buzz regarding Tampa Bay as a destination.
- More co-op programs are in place.
- The value of tourism on the quality of life is recognized by local residents throughout the region.
- We have professional staff at work implementing our vision and strategies.

2. What are the private, public and non-profit sectors doing differently today than in 2013 that has made regional product enhancement a model for other regions to emulate?

- Making the Visions (listed above) happen.

3. Team Actions

- Infrastructure – Connect neighborhoods, and create incentives for community businesses (arts, tours, etc. not just parking areas).
- Messaging – Design internal and external businesses and resident outreach, including a tourism speaker's bureau.
- Transit – foster and achieve tourist transportation options.

THEME THREE: VISION AND ACTIONS FOR TOURISM COLLABORATION

1. What has happened as a result of successful regional collaboration?

- We reap great benefits from embracing our entire tourism system as one region, one destination, one media buy and one brand.
- Sell tourism and economic development business as a simultaneous message.
- We sell everything we have to offer, and are no longer thought of just for our great beaches.
- We have redefined to the world the vibrancy and diversity of what the Tampa Bay Region is all about.
- Our various and separate marketing agencies have amalgamated their programs with a single image with rich subsets.
- Regional businesses and residents know the value of tourism to their quality of life via our “What’s In It for Me” message.
- Parochial thinking has been replaced.
- Tourism has become more privatized and less politicized.
- Florida law now allows Tourism Business Improvement Districts (TBID).
- Light rail, water, bus transport nodes, link downtown St. Pete, Tampa, Airport, and Beaches.
- Cyclists can share routes.
- Improved way-finding (multi-language)
- More international visitors because we are friendlier to them.
- The Rays stay in the region, deciding for themselves where they want to be instead of local political infighting.
- Pooled resources save money on overhead.
- A repository for regional funds from TDC
- Combine TDC/EDC funds for “Bay Area Brand Marketing” to support cross messaging.
- Get politicians out of funding or marketing process.
- Collaborative Tampa Bay Ambassador Program.

2. What are the private, public and non-profit sectors doing differently today than in 2013 that has made being collaborative a model for other regions to emulate?

- We are no longer resisting what the world knows us as (“Tampa Bay”) and have moved on to embrace it.

3. Team Action Ideas

- Create one organization to market the entire Tampa Bay area.
- Identify non-TDC Funding approaches.
- Take smaller steps first to build pattern of success.

THEME FOUR: VISION AND ACTIONS FOR INTEGRATED TOURISM RESOURCES

1. What has happened as a result of successful resource integration?

Transportation Network

- We are now moving people successfully from one regional asset or venue to another
- Easy public transport access to venues and sports facilities
- Tie/offer transit service with hotel packages
- Friendly efficient responsive cabs, taxi fares set (e.g. Houston's "6" program with one \$6 go anywhere all day fare)

One Mission with all tourism associations and marketing agencies working together and coordinating efforts:

- Travel America (bus)
- Visit Florida (extra marketing)
- CVBs (Tampa Bay and St. Pete/Clearwater and other counties)
- Sharing solutions ("Green bench")
- Quarterly Board working together for events, integration and vesting (board of attractions-bus tour and events)

Youth Sports

- Good facilities, including at the Convention Center, University of Tampa (UT) & University of South Florida (USF)
- Work with school districts

Integrating our Resources

- Bundled Experiences
- Turnkey options for visitors
- Variety/Themes
- Venues linked and tied by transportation network and services
- For meeting Planners & individual travelers
- Vertical integration of venues
- One Visitor Guide for Tampa Bay, one metro area, one destination (2013- already recognized by traveler, and by 2018 – recognized by local government and travel associations.)
- Central Funding Pool (legislative roadblocks removed)
- Vibrant Downtowns – during the day and evening ("the sociable city", "Digital city")
- Tourism/Hospitality Industry recognized as major economic generator
- Spending in community
- Sales tax revenue
- Jobs
- Customer service is great
- Entertainment and film industry
- Package Deals

- CitiPass
- Tampa Convention Center Acoustics improved
- Tampa Bay Sports Commission – Event incubator
- Annual job fair

2. What are the private, public and non-profit sectors doing differently today than in 2013 that has made regional resource integration a model for other regions to emulate?

- We are no longer resisting what the world knows us as (“Tampa Bay”) and have moved on to embrace it.

3. Team Action Ideas

- Visitor Friendly Transportation.
- Tourism Sales Toolbox.
- Tampa Bay Regional Leadership Council.
- One Tampa Bay Visitors Guide.

BIG PICTURE CONSOLIDATION AND NEXT STEPS

The Facilitator undertook some refinement and reorganization of the above results with the intent of reducing overlapping visions and ideas while emphasizing the most powerful ideas. One fundamental change was the conversion of the four primary themes set in 2008, and used in this workshop from names to qualities. A second change split “Economy and Infrastructure” into two more distinctive and equally important themes – “Sustainable” and “Connected.”

WHAT NEXT?

The next step is to engage industry partners and workshop participants interested in achieving one or more of the strategies. The participants agreed that rather than spending part of the workshop in identifying specific projects, tactics and tasks for each strategy, the Convention and Visitors Bureaus along with County staff and other participants will reach out to industry members who want to realize an objective and can contribute to the implementation steps and the resources to attain the desired objective. Teams can emerge around the implementation of the strategies and can set out specific projects and bold actions. They can bring resources to support the implementation of the activities. Metrics and timelines for each project can be best estimated by those who have an interest in the successful completion of a particular project. As the implementation continues, refinements to the Actions and emerging new partnerships can be expected to unify the Vision.

APPENDIX A – RETREAT PARTICIPANTS

The teams and volunteer facilitators are grouped by the four Teams:

Participants

Economy and Infrastructure

Pam Avery

Bill Giesecking

Tom Keating

Georgiana Young

Chuck Pesano

T. Hampton Dohrman

Clyde Smith

Mayor Bob Buckhorn

Jim Shimberg

Marilyn Hett

Product Enhancement

Art Keeble

Jennifer Mikosky

Ken Anthony

Mayor Frank Chillura

Leslie Langford

Thom F. Stork

Manny Leto

Greg Orchard

Benita Maynor

Joselle Pulgaron

Collaboration

Lou Plasencia

Georgia Vahue

Vince Pardo

Doug McClain

Ty Rodriguez

Eric Blanc

Cricket Wagner

Stacey Swank

Scott Rose

Company/Organization

Holiday Inn (fka Wyndham)Tampa Westshore-Airport
and Florida Restaurant & Lodging Association
(FRLA) (Team Facilitator)

Pepin Distributing Company

Ybor City Chamber of Commerce

The Straz Center

Florida State Fair Authority

Creative Pinellas

Bilmar Beach Resort

City of Tampa

Tampa Bay Lightning

Hillsborough County Economic Development

Arts Council of Hillsborough County (Team Facilitator)

Tampa EDC

Tampa Bay Black Heritage Festival, c/o Affinity Ins. Agency

City of Temple Terrace

Tampa Museum of Art

Florida Aquarium

Tampa History Museum

Visit Tampa Bay

Tampa Bay Black Heritage Festival

Hillsborough County Economic Development

The Plasencia Group, Inc. (Team Facilitator)

Firehouse Cultural Center in Ruskin

Ybor Community Development Corporation

Visit Tampa Bay

Gasparilla Music Festival

Tampa Convention Center

Sirata Beach Resort

Pinellas County Economic Development Corporation

Florida Aquarium

Participants

Integrated Resources

Bob Morrison, Jr.

Rob Higgins

Barbara Sparks-McGlinchy

Santiago Corrada

Greg Lovelace

Rick Hamilton

Eric Johnson for B. Wise

Ronald Barton

Donna McBride

Company/Organization

Hillsborough County Hotel/Motel Association (HCHMA)
(Team Facilitator)

Tampa Bay Sports Commission

Temple Terrace Chamber of Commerce

Visit Tampa Bay

Tampa Port Authority

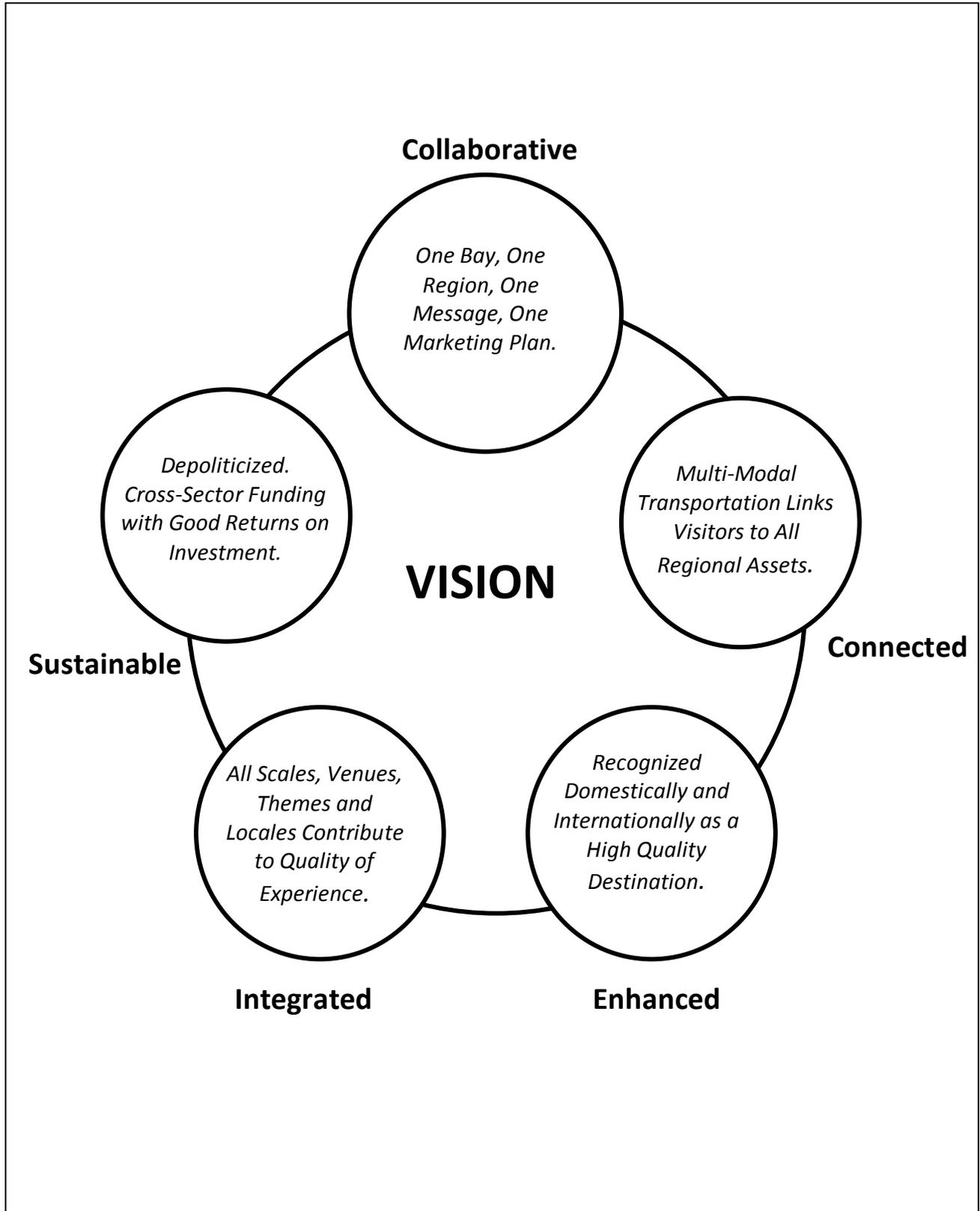
Tampa Convention Center

Hillsborough County BOCC

Hillsborough County Economic Development

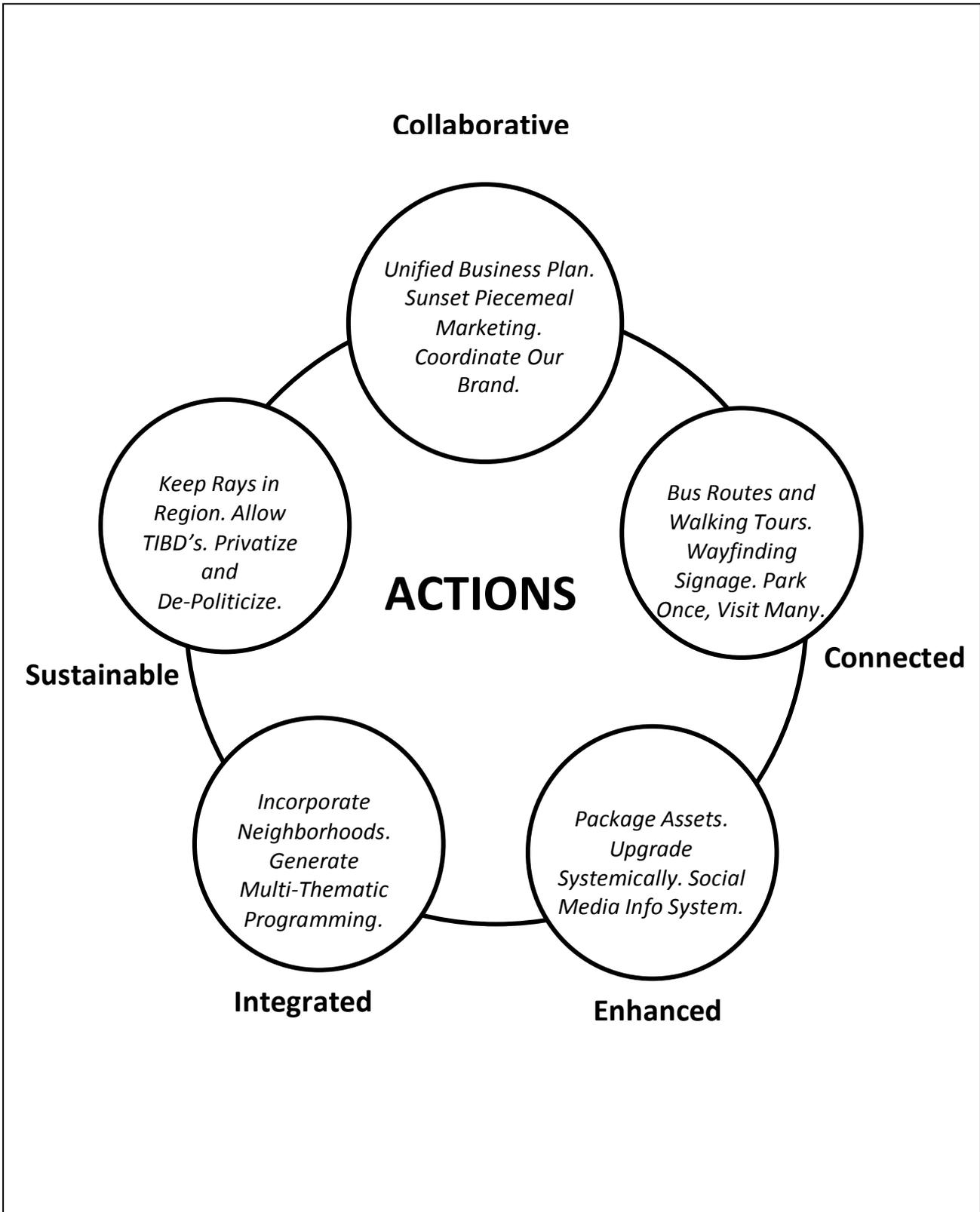
The Straz Center

APPENDIX B – BIG PICTURE VISION CONSOLIDATION



NOTE: Illustration reflects most significant team vision content.

APPENDIX C – BIG PICTURE ACTION CONSOLIDATION



NOTE: Illustration reflects most significant team action ideas.

EXHIBIT D – ECONOMY/INFRASTRUCTURE ACTION WORKSHEETS

Economy/Infrastructure Action Worksheet

Unique Name of Strategy: Five Steps to Recession Proof Tourism Plan

Status (check one) Existing (2008 with modifications) New (2013)

A. List Basic Tasks Foreseen (up to five—details can be developed later by action teams)

1. Every corporation (Tampa’s top 30) provides a prospect list of up to seven associations.
2. They pay for senior executive membership, and every new corporate relocation. Provides the top seven meetings they plan or attend.
3. Develop/construct amateur athletic facility.
4. Develop annual marketing plan that highlights leisure packaging.
5. Retrofit convention center every 15 years with no feature older than five years

B. Specific and Measurable Indicators that will allow tracking of success (\$’s, %’s, etc.):

1. Decide operational plan for amateur athletics facility.
2. Work with corporate partner to recruit new and return business.
3. Package Busch Gardens with leisure objectives so we build a tourist tax growth plan.

C. Action Team Participants (please place * on which one should lead and coordinate the action team)

- Organization
- Chamber
- Visit Tampa Bay (CVB)
- Hillsborough County Hotel/Motel Association (HCHMA)
- Busch Gardens
- Airport
- Tampa Convention Center

Economy/Infrastructure Action Worksheet

Unique Name of Strategy: Venue/Event Inventory

Status (check one) Existing (2008 with modifications) New (2013)

A. List Basic Tasks Foreseen (up to five—details can be developed later by action teams)

1. Inventory and assess current event venues.
2. Incorporate state of the art technology into venues.
3. Determine need for new/enhanced vs. type of tourism to be attracted (e.g. youth sports).
4. Determine what transportation is needed.
5. Identify amenities available on visitor arrival (malls, movies, restaurants).

B. Specific and Measurable Indicators that will allow tracking of success (\$'s, %'s, etc.):

1. Dollars spent by visitors in area of venue.
2. Rental of facilities/tickets sold.
3. Bed nights.

C. Action Team Participants (please place * on which one should lead and coordinate the action team)

- Organization
- City/County/Municipal
- Sports Commission
- Visit Tampa Bay/CVBs

Economy/Infrastructure Action Worksheet

Unique Name of Strategy: Tourism Development Through Incentives and New Infrastructure

Status (check one) Existing (2008 with modifications) New (2013)

A. List Basic Tasks Foreseen (up to five—details can be developed later by action teams)

- 1. New funding allocations leading to tourism incentives.
- 2. Historic/Cultural/Ecotourism study.

B. Specific and Measurable Indicators that will allow tracking of success (\$'s, %'s, etc.):

- 1. Metrics used (definite room nights, economic in/out, etc.) to determine return on investment (funds used to abate rent at the Center, rebate rooms).
- 2. Financial incentives to lure business.
- 3. Study should determine inventory of assets as well as project ROI of bundling and selling those assets.

C. Action Team Participants (please place * on which one should lead and coordinate the action team)

- Organization
- Hillsborough Economic Development Department
 - Tourist Development Council
 - Convention Center/City
 - BOCC
 - Hillsborough County Hotel/Motel Association
 - Ybor City Development Corporation
 - Ybor City Chamber
 - City of Plant City
 - City of Temple Terrace
 - Visit Tampa Bay

Economy/Infrastructure Action Worksheet

Unique Name of Strategy: Best Convention Center in the Nation

Status (check one) Existing (2008 with modifications) New (2013)

A. List Basic Tasks Foreseen (up to five—details can be developed later by action teams)

1. Five-Star customer service development.
2. Most advanced technology available and always current.
3. Luggage handling from Convention Center to airplane.
4. Center part of destination, restaurants, shops, etc.

B. Specific and Measurable Indicators that will allow tracking of success (\$'s, %'s, etc.):

1. Increased bookings.
2. Increased attendance.
3. Increased ADR's in area hotels.
4. Increased occupancy rates.

C. Action Team Participants (please place * on which one should lead and coordinate the action team)

- Organization
- *City of Tampa
- FRLA (Florida Restaurant & Lodging Association
- Tampa Convention Center
- Hillsborough County Hotel/Motel Association (HCHMA)
- Client Advisory Group
- Sports Commission
- Sports Authority
- Visit Tampa Bay
- Other Boards of Interest

Economy/Infrastructure Action Worksheet

Unique Name of Strategy: 10/45 Express Blue Service Connecting Primary transit Hubs & Tourist Destinations

Status (check one) Existing (2008 with modifications) New (2013)

A. List Basic Tasks Foreseen (up to five—details can be developed later by action teams)

1. Identify critical nodes for transit hubs that connect primary express-oriented tourist destinations.
2. Create network of bus service that operates between critical hubs within reliable transit times.
3. Affordable and safe.
4. Push/market services in conjunction with bundled attractions menu.

B. Specific and Measurable Indicators that will allow tracking of success (\$'s, %'s, etc.):

1. Frequency of bus service every 10 minutes.
2. Maximum transit time to anywhere from anywhere established (30, 40 minutes).
3. Sustainable.
4. Customer satisfaction percent (surveys).

C. Action Team Participants (please place * on which one should lead and coordinate the action team)

Organization
Transit Authorities (Hillsborough & Pinellas) and CVBs

Economy/Infrastructure Action Worksheet

Unique Name of Strategy: Charter Bus Service to Supplement/Build Contention/Visitor Experiences

Status (check one) Existing (2008 with modifications) New (2013)

A. List Basic Tasks Foreseen (up to five—details can be developed later by action teams)

1. Facilitate licensing/operation of high end charter bus service.
2. Develop model to integrate activities with/for convention participants and their families.
3. Coordinate with venues for expedited entry of bus passengers.
4. Build cost info package rate for conventions, conferences, hotels.

B. Specific and Measurable Indicators that will allow tracking of success (\$'s, %'s, etc.):

1. Percent of venue visitors arriving by charter service.

C. Action Team Participants (please place * on which one should lead and coordinate the action team)

- Organization
- Visit Tampa Bay (CVB)
 - Tampa Convention Center
 - Hillsborough County Hotel/Motel Association
 - Public Transportation Commission

Other

Other communities routinely use high-end charter buses to facilitate visitors not needing a rental car.

They run circular service from hotels to the convention center and local venues to facilitate group tours.

In our case, quality charter service emulates some of the connectivity our community is looking for through rail.

Economy/Infrastructure Action Worksheet

Unique Name of Strategy: Business Plan for Tourism

Status (check one) Existing (2008 with modifications) New (2013)

A. List Basic Tasks Foreseen (up to five—details can be developed later by action teams)

1. Vision and key objectives established (unity of purpose) including physical marketing, leveraging and maintaining.
2. Timeline implications.
3. Cost factors (operations and capital).
4. Priorities based on ROI and investment to benefit modeling.

B. Specific and Measurable Indicators that will allow tracking of success (\$'s, %'s, etc.):

1. ROI with rigor.
2. Visitors to market.
3. Room night demand.
4. Gross market movement.
5. Value proposition underwriting. Stick to plan measurements.

C. Action Team Participants (please place * on which one should lead and coordinate the action team)

Organization	Position
<u>FRLA</u>	
<u>Visit Tampa Bay (CVB)</u>	
<u>Hotel/Motel Association</u>	
<u>Local Governments</u>	
<u>Visitor operators</u>	
<u>Attractions</u>	

Other

Other communities routinely use high-end charter buses to facilitate visitors not needing a rental car.

They run circular service from hotels to the convention center and local venues to facilitate group tours.

In our case, quality charter service emulates some of the connectivity our community is looking for through rail.

Economy/Infrastructure Action Worksheet

Unique Name of Strategy: Cultural Tourism Tampa Bay

Status (check one) Existing (2008 with modifications) New (2013)

A. List Basic Tasks Foreseen (up to five—details can be developed later by action teams)

1. Convene all possible/potential cultural tourism stakeholders.
2. Develop vision that states cultural tourism strengths.
3. Compile economic impact and quality points for cultural tourism industry in region.
4. Compile and market diversity and expanse of cultural tourism offerings.
5. Partner and incorporate into regional business and tourism marketing efforts.

B. Specific and Measurable Indicators that will allow tracking of success (\$'s, %'s, etc.):

1. Report/monitor interest, action, sales and contracts related.
2. Publish, share, use success to attract/promote more.
3. Measure economic impact on jobs, business attraction, tourist days, audience numbers, days in service.
4. Gross market movement.
5. Review other/competing markets, set competitive plan, take action.

C. Action Team Participants (please place * on which one should lead and coordinate the action team)

- Organization
- Straz Center, St. Pete/Clearwater Cultural Venues
- Aquarium
- Zoo
- MOSI
- Florida Museum of Photographic Arts
- Tampa Theatre
- Stage Works
- Arts Council of Hillsborough County
- Tourist Development Council
- History Center, others.

Other

- In addition to representation by spread of cultural organizations, bring representation to table from private businesses, commercial cultural-related and public leadership.
- Work with Economic Development, Visit Tampa Bay, CVBs and tourism market agencies to provide comprehensive picture of what the region offers in cultural tourism.

APPENDIX E - PRODUCT ENHANCEMENT ACTION WORKSHEETS

Product Enhancement Action Worksheet

Unique Name of Strategy: Live Tampa Bay

Status (check one) Existing (2008 with modifications) New (2013)

A. List Basic Tasks Foreseen (up to five—details can be developed later by action teams)

- 1. Improve transit options and safety; enhance connections.
- 2. Incentivize galleries, retail, incubators, events.
- 3. Beautification, public art, artists - support needed.
- 4. Encourage amended zoning to encourage retail, not car lots.
- 5. Support neighborhood tours.

B. Specific and Measurable Indicators that will allow tracking of success (\$'s, %'s, etc.):

- 1. Grant funding for neighborhood tours.
- 2. Support for retail, breweries, galleries.
- 3. Work with City on basic streetscape beautification.

C. Action Team Participants (please place * on which one should lead and coordinate the action team)

- Organization
- Neighborhood services
- Visit Tampa Bay (CVB)
- Neighborhood Associations
- HART
- Local artists

Product Enhancement Action Worksheet

Unique Name of Strategy: Defining Downtown

Status (check one) Existing (2008 with modifications) New (2013)

A. List Basic Tasks Foreseen (up to five—details can be developed later by action teams)

1. Create a persona for Downtown Tampa. Encourage concentrated, unique restaurants and shops to open downtown (not full of chains), more sophisticated and of the moment.
2. Task force led by group to ensure a range of groceries/retail/restaurants and bars.
3. Improved, more prominent signage downtown including various cultural sites and where to park.
4. United front and co-op marketing/advertising for downtown, residential, commercial, business and culture
5. Support neighborhood tours.

B. Specific and Measurable Indicators that will allow tracking of success (\$'s, %'s, etc.):

1. Increased residential occupancy.
2. Increased attendance at cultural institutions, restaurants and shops.
3. Feedback as to culture and entertainment venues, a driver study.
4. Press on a national level as to the quality/uniqueness of Tampa's downtown.
5. More business from big cities (LA, NYC, etc) moving their headquarters to downtown Tampa.

C. Action Team Participants (please place * on which one should lead and coordinate the action team)

Organization

Downtown Tampa Partnership, Arts Council of Hillsborough County, Tampa Museum of Art, Florida Aquarium, Florida Museum of Photographic Arts, Visit Tampa Bay, Tampa Bay History Center, Tampa Bay Times Forum, Channelside, Skypoint/Element, The Straz, Tampa Hillsborough Economic Development Corporation, H.B. Plant Museum, Port of Tampa.

Product Enhancement Action Worksheet

Unique Name of Strategy: Tourism Talks/Training

Status (check one) Existing (2008 with modifications) New (2013)

A. List Basic Tasks Foreseen (up to five—details can be developed later by action teams)

1. <u>Value video and other collateral.</u>
2. <u>Speaker’s Bureau</u>
3. <u>Training (GET).</u>
4. <u>More inclusion on non-hospitality (one-on-one).</u>
5. <u>Editorials/editorial boards.</u>

B. Specific and Measurable Indicators that will allow tracking of success (\$’s, %’s, etc.):

1. <u>Completion of video/dissemination and number of showings.</u>
2. <u>Formation of focus/number of presentations</u>
3. <u>Broadening of program/number of training attendees.</u>
4. <u>Meetings (both one-on-one as well as through Speaker’s Bureau.</u>
5. <u>Positive stories/editorials about value proposition.</u>

C. Action Team Participants (please place * on which one should lead and coordinate the action team)

<u>Organization</u>
<u>Visit Tampa Bay (CVB)</u>
<u>Broadcast media representatives</u>
<u>PRSA representative</u>
<u>HCHMA</u>
<u>Arts</u>
<u>FRLA</u>

Product Enhancement Action Worksheet

Unique Name of Strategy: Cultural and Historic Tours

Status (check one) Existing (2008 with modifications) New (2013)

A. List Basic Tasks Foreseen (up to five—details can be developed later by action teams)

1. Get private entrepreneurs and funding.
2. Get permitting from City, Port Authority, etc.
4. Arrange venues and routes for tours.
5. Set schedule.

B. Specific and Measurable Indicators that will allow tracking of success (\$'s, %'s, etc.):

1. Number of riders per week.
2. Press coverage.
3. Support and promotion from hotels and other attractions.
4. Number of brochures distributed at airport, hotels, convention center, and other venues.

C. Action Team Participants (please place * on which one should lead and coordinate the action team)

- Organization
- Hyde Park Neighborhood Association
- Tampa Port Authority
- Ybor Chamber
- H.B. Plant Museum
- Hillsborough County Motel and Hotel Association
- Ybor City Museum
- Tampa Theatre
- Ybor City Development Association
- Arts Council of Hillsborough County
- Tampa Museum of Art
- Tampa Historical Society
- Tours of: Homes in Hyde Park (architecture); Ybor City – coffee brewing, Cuban bread baking, social clubs;
- Charlie Wall’s home; Museums and historic venues; Oaklawn, Italian Club and Centro Espanol Cemeteries

EXHIBIT F – INTEGRATED RESOURCES ACTION WORKSHEETS

Integrated Resources Action Worksheet

Unique Name of Strategy: Value of Tourism as Transportation Customer

Status (check one) Existing (2008 with modifications) New (2013)

A. List Basic Tasks Foreseen (up to five—details can be developed later by action teams)

- 1. Do an economic analysis of dollars tourists spend on all forms of transportation – gas/rental cars/cabs, public.
- 2. Develop “theme of tours” by category, i.e., culture and history, ecotourism, cuisine, etc.

B. Specific and Measurable Indicators that will allow tracking of success (\$’s, %’s, etc.):

- 1. Disseminate info to all transportation groups.
- 2. Send representatives to hearings, etc.
- 3. Solicit ideas from destinations.
- 4. Contract with private companies to operate transportation.

C. Action Team Participants (please place * on which one should lead and coordinate the action team)

- Organization
- Tampa Bay Regional Tourism Group - new
- Chambers of Commerce
- Downtown Association
- Tampa Bay Partnership
- *tie in as focus of Regional Tourism Group
- *tours program as element of Regional Tourism Group
- Where is TBARTA now?

Integrated Resources Action Worksheet

Unique Name of Strategy: Sales Tool Box

Status (check one) Existing (2008 with modifications) New (2013)

A. List Basic Tasks Foreseen (up to five—details can be developed later by action teams)

1. Integrate all assets into packages or menus for meeting planners.
2. Be sure our hospitable, sociable, friendly city is part of our sales effort.
3. Recognize demographics of visitors (younger/nightlife and mature/dining).
4. Make a digital video with “excursion packages”.
5. Train sales people – need to be educated on all resources we offer, not just facilities.

B. Specific and Measurable Indicators that will allow tracking of success (\$’s, %’s, etc.):

1. Sales of packages through meeting planners.
2. Attendance numbers.
3. Percent of success for attracting business.
4. Visitor/convention attendee attraction ticket sales reported to TDC.

C. Action Team Participants (please place * on which one should lead and coordinate the action team)

Organization
Port Authority Options for cruise ship visitors to do

Comments from Other Team Members (improvements, other participants, etc.)

- Preplanned/costs packaging in group.
- Salesperson tool box.
- Preprice/prepackage.
- Front-end offerings early at set prices.
- Budget for sales team.

Integrated Resources Action Worksheet

Unique Name of Strategy: Tampa Bay Regional Tourism Council

Status (check one) Existing (2008 with modifications) New (2013)

A. List Basic Tasks Foreseen (up to five—details can be developed later by action teams)

1. Gather representatives from all stakeholders to include CVBs, hotel and restaurant associations and attractions.
2. Meet quarterly to consolidate mission of tourism in Tampa Bay.
3. Promote tourism and events in Tampa Bay via media (Hospitality Week).
4. Gather strength in tourism in lobby efforts and improve communication.

B. Specific and Measurable Indicators that will allow tracking of success (\$'s, %'s, etc.):

1. Increased cooperation amongst the areas.
2. Increased "Across Bay" marketing incentives.
3. Increased work and funding (co-op) with Visit Florida.
4. High engagement and attendance at all meetings.

C. Action Team Participants (please place * on which one should lead and coordinate the action team)

- Organization
- Visit Tampa Bay (CVB)
- Visit St. Pete/Clearwater (CVB)
- Hillsborough County Hotel/Motel Association
- Florida Restaurant and Lodging Association (FLRA)
- Attractions
- Attractions (Hillsborough)
- Attractions (Pinellas)
- Independent Chair
- Sports Commission

Integrated Resources Action Worksheet

Unique Name of Strategy: Citi Pass – Multi-Venue Pass

Status (check one) Existing (2008 with modifications) New (2013)

A. List Basic Tasks Foreseen (up to five—details can be developed later by action teams)

1. CitiPass – Create cooperation between the different tourist venues so one ticket could be used at multiple venues (go online and reserve your spot).

B. Specific and Measurable Indicators that will allow tracking of success (\$'s, %'s, etc.):

1. This would give us a way to market the area and show the strong cooperation between the venues on both sides of the bay.
 2. Track by different types of pass.

C. Action Team Participants (please place * on which one should lead and coordinate the action team)

Organization
Coordinated effort between the sports, arts and culture and other related venues.
The idea would have to be developed at the high level but implemented by the marketing managers.

Other Ideas/Strategy

One visitor guide (free and funded by TDC).
Tourist Advisory Council (Quarterly Marketing Meeting).
Tourism voice in transportation.
Digital content coordination (sales tool).
Carpet for Convention Center.
Transportation advocacy.
New development for small ideas (restaurants/theatres).

Integrated Resources Action Worksheet

Unique Name of Strategy: Digital Content Strategy

Status (check one) Existing (2008 with modifications) New (2013)

A. List Basic Tasks Foreseen (up to five—details can be developed later by action teams)

1. Integrate user technology to enhance visitor experience.
2. Design, maintain and distribute mobile and geo-location tourism platforms.
3. Interactive and engaging tools that provide visitor amenities to CVBs.
4. Market and distribute application.
5. Hotels offer free internet, marketing materials in room.

B. Specific and Measurable Indicators that will allow tracking of success (\$'s, %'s, etc.):

1. Digital content provided.
2. Users and analytic information – information on users proved back to businesses.
3. Survey data.

C. Action Team Participants (please place * on which one should lead and coordinate the action team)

- Organization
- Tampa Bay Tech Forum
- CVB
- Wave/Gazelle Incubators
- USF/UT
- Airport
- HCHMA
- Tourist assets using platforms
- FRLA – (restaurant associations in both counties)
- Other transportation hubs/rental cars.

Integrated Resources Action Worksheet

Unique Name of Strategy: Career Opportunity Fair

Status (check one) Existing (2008 with modifications) New (2013)

A. List Basic Tasks Foreseen (up to five—details can be developed later by action teams)

1. Organize a group of representatives from organizations.
2. Set up times over year to plan best timing.
3. Coordinate with existing job fairs offered by colleges/schools.
4. Work with HCHMA & FRLA to market to hotels, leisure time industries, food/beverage and venues.
5. Market future job opportunities to industry.

B. Specific and Measurable Indicators that will allow tracking of success (\$'s, %'s, etc.):

1. Trip advisor #1 in customer service rating.
2. Number of Attendees
3. Number of jobs.
4. Number of firms participating.
5. Number of students placed, salary profiles, press-releases for event before and after on impact. -

C. Action Team Participants (please place * on which one should lead and coordinate the action team)

Organization	
<u>University of Tampa</u>	<u>University of South Florida</u>
<u>Hillsborough Community College</u>	<u>High School – Tourism Academy</u>
<u>Tampa Bay Times Forum</u>	
<u>Pro Start</u>	

Comments from Other Team Members (improvements, other participants, etc.)

- No hiring season here.
- Tie to training program for customer service.
 - Quintessential Tampa Bay experience
 - Volunteers and staff
- Strategic alliance and job training program.
- Fun activities for job participant – tie to CVB in tourism week.
- Tie to volunteer program
- Rehabilitation option.