

RESEARCH DATA SERVICES, INC.

777 SOUTH HARBOUR ISLAND BOULEVARD • SUITE 260
TAMPA, FLORIDA 33602
TEL (813) 254-2975 • FAX (813) 223-2986

COMMISSION AGENDA:

2.11.14 #18

Visit St. Petersburg/Clearwater

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



Prepared for:

Pinellas County Tourist Development Council

and

Visit St. Petersburg/Clearwater

Prepared by:

Research Data Services, Inc.

Research@ResearchDataLLC.com

November 2013

2 | Page

11/07/2013



2013 Pinellas County Visioning Interviews: *Exploratory Findings*

SWOT ANALYSIS

STRENGTHS		WEAKNESSES	
<ul style="list-style-type: none"> • Beaches • Relaxed lifestyles • Weather • Proximity to Orlando • Tampa International Airport • Parks and preserves such as Weedon, Brooker Creek • Good restaurants • Gulf of Mexico • Warm water • Calm water • Visionary local leadership (Minich, Lopano, etc.) • Clean beaches, waterways, causeways, bridges • Institutes and legacy organizations • Medical, eco, sports, and wide variety of niche markets • Leadership focused on quality of life issues 		<ul style="list-style-type: none"> • Lack of clear priorities • Quality and spectrum of restaurants available • Aging properties • Aging infrastructure • Local and regional transportation • Poor attitude of some of the service industries regarding visitors • No major North County attraction • Lack adequate training for points of contact with the visitors such as hostesses and cabdrivers • Not enough capital investments and new promotions to be considered nationally competitive in 1st tier markets • No convention center • Lack of investment into heads in beds • Continuing perception of oil on Gulf beaches • Low wage tourism jobs • No evaluation tool for tax spending • Need for more branded hotels in the County to add to credibility • Lack iconic buildings and known landmarks • Being too arrogant to consider our mid-market industry's needs. 	
OPPORTUNITIES		THREATS	
<ul style="list-style-type: none"> • Aquarium attraction for non-beach activities in north county • Growth of year round sports tourism • Investment into Greenlight Pinellas • Collaborative efforts (i.e. Brand USA/Expedia/Visit Florida, Arts Council, PSTA) • Growth of arts and eco-tourism components • Development of water parks • More Gulf water activities • Training of cab drivers, hostesses, and service-industry workers to create tourism ambassadors • Create venues for growth of festivals and races • Modernize beach walkways • Enhance Gulf Boulevard's landscaping to create a "Visual Door" • Modernize Gulf Boulevard's utilities and lighting • Find investors for Tropicana Field • Increase TV exposure • Invest in historical and cultural landmarks • Waterfront transit • Waterfront entertainment • Connecting Clearwater Beach hotels to St. Petersburg downtown restaurants without a large cost to the visitor • Convention Center to hold large events • Conversion of Toy Town into a sports arena • Informing citizens of the benefits of bed tax investments 		<ul style="list-style-type: none"> • Losing federal beach nourishment funding • Rising sea levels • Spending too much on brick and mortar • Continual bailout of companies that should rely on ticket sales alone • Lack of support from community to change and redevelopment • Environmental threats • Close-minded leadership • Airline carriers pulling out of local airports • Growth in condos due to lack of redevelopment of hotels • Seasonal weather threats • Losing large scale meetings • Being drawn into local issues and paying for infrastructure that the TDC should not concern themselves with. • Losing sight of Pinellas County's brand identity 	

2013 Pinellas County Visioning Interviews: *Exploratory Findings*

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

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

RESORT TAX SPENDING PRIORITIES (1 = Highest Priority)

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

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

CRITERIA USED TO MEASURE ROI

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

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

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