Process Overview

Phase One - Research

- Secondary Research
- Field Research
- Brand Awareness Study

Phase Two - Planning

- Stakeholder Interviews
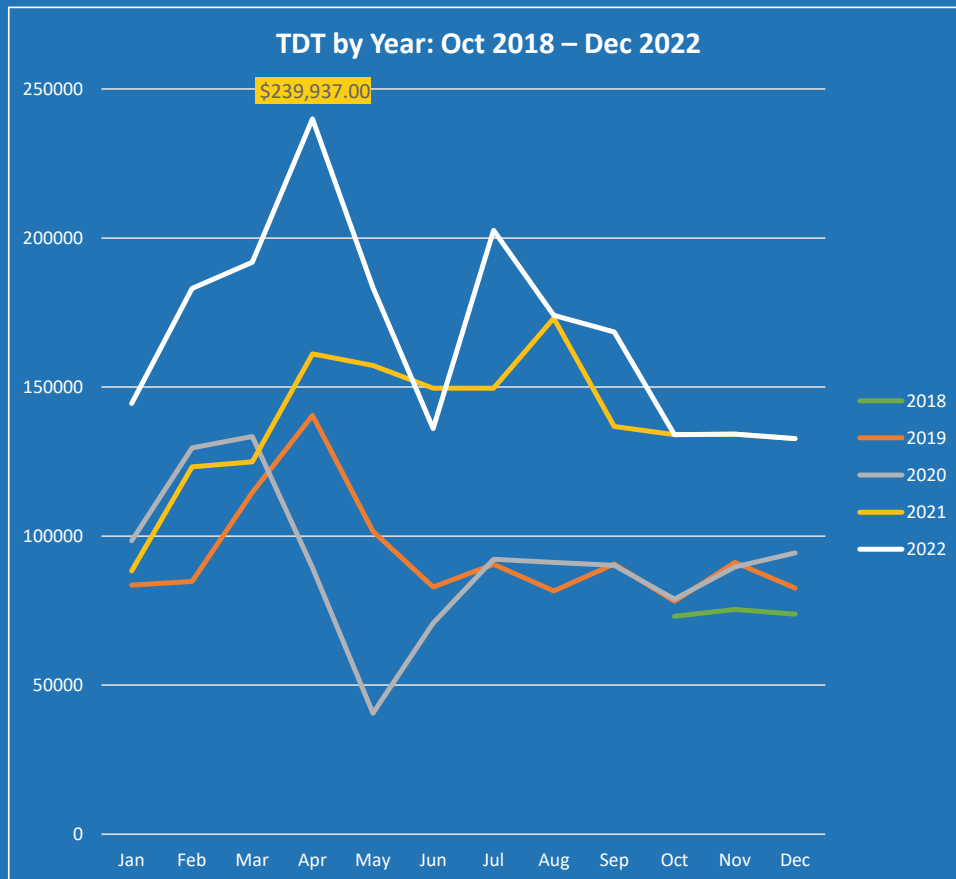- Stakeholder Workshop
- Staff Workshop

Secondary Research
Points of Note
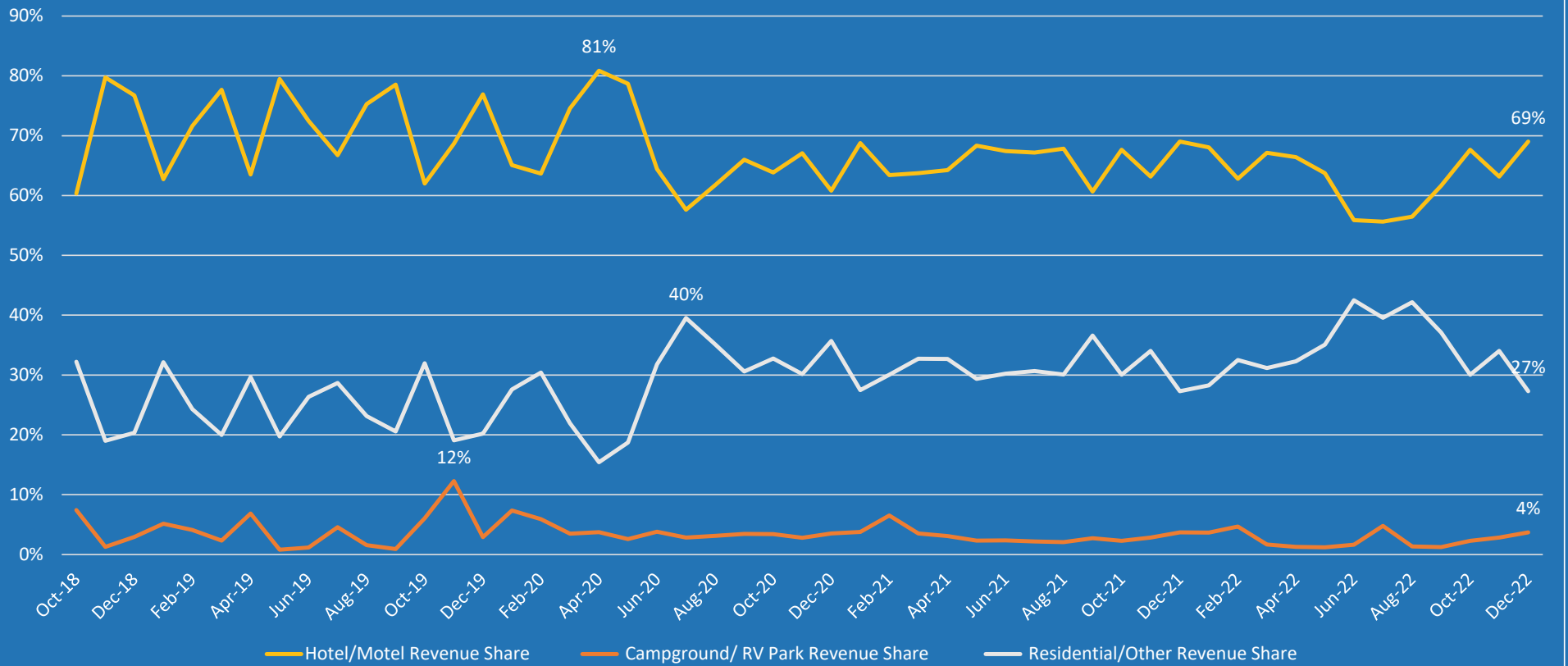
Overall
Collections

TDT by Year: Oct 2018 – Dec 2022

$239,937.00

- TDT Collections continue to grow impressively

- April 2022 saw nearly a quarter million in reported collections

- The picture is clear – tourism continues to grow in Hernando County
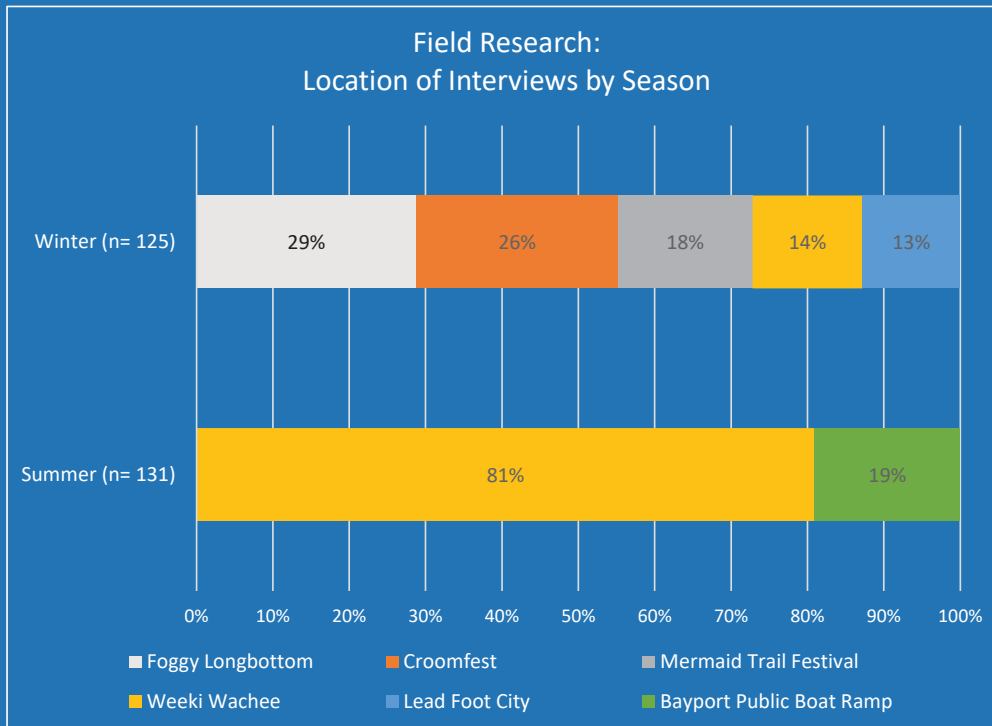
TDT by Lodging Type: Oct 2018 – Dec 2022

Field Research
Findings

Field Research
Methodology

Field Research:
Location of Interviews by Season

Season	Foggy Longbottom	Croomfest	Mermaid Trail Festival	Weeki Wachee	Lead Foot City	Bayport Public Boat Ramp
Winter (n= 125)	29%	26%	18%	14%	13%	
Summer (n= 131)				81%		19%

Legend:
- Foggy Longbottom
- Croomfest
- Mermaid Trail Festival
- Weeki Wachee
- Lead Foot City
- Bayport Public Boat Ramp

HCP conducted 256 in-person dispatch interviews at two different time periods (summer and winter) at different locations where tourist frequent to have an experience in Hernando County.

Type: **Dispatch Survey**
Responses: **256** *(Plotted)*
Margin of Error: **6.125%**
Dates in field: Summer: **7/27/2022 – 8/6/2022**
Winter: **1/21/2023 – 2/12/2023**

Location of Respondents

Summer Dispatches (n= 131)	
Where is home?	Percentage
Florida	67%
Missouri	3%
Ohio	2%
Georgia	2%
Pennsylvania	2%
Virginia	2%
California	2%
Oklahoma	2%
Texas	2%
Kentucky	2%
Minnesota	2%
China	1%
Indiana	1%
Alabama	1%
Michigan	1%
Ireland	1%
Connecticut	1%
Norway	1%
France	1%
Illinois	1%
Nevada	1%
Tennessee	1%
New Jersey	1%
Thailand	1%
New York	1%
Maryland	1%
North Carolina	1%

Winter Dispatches (n= 125)	
State	Percentage
Florida	76%
New York	3%
Pennsylvania	2%
Ontario	2%
Ohio	2%
Maryland	2%
Alaska	2%
Wisconsin	2%
Indiana	1%
Massachusetts	1%
Amsterdam	1%
Colorado	1%
Illinois	1%
Minnesota	1%
Oregon	1%
New Jersey	1%
Utah	1%
Costa Rica	1%
Nova Scotia	1%
Michigan	1%
The Bahamas	1%

In the summer, respondents came from 22 different states and 5 foreign countries

In the winter, respondents came from 18 different states and 3 foreign countries

Florida residents, on the next slide, came primarily from nearby counties (Hillsborough, Pinellas, Pasco, Citrus)
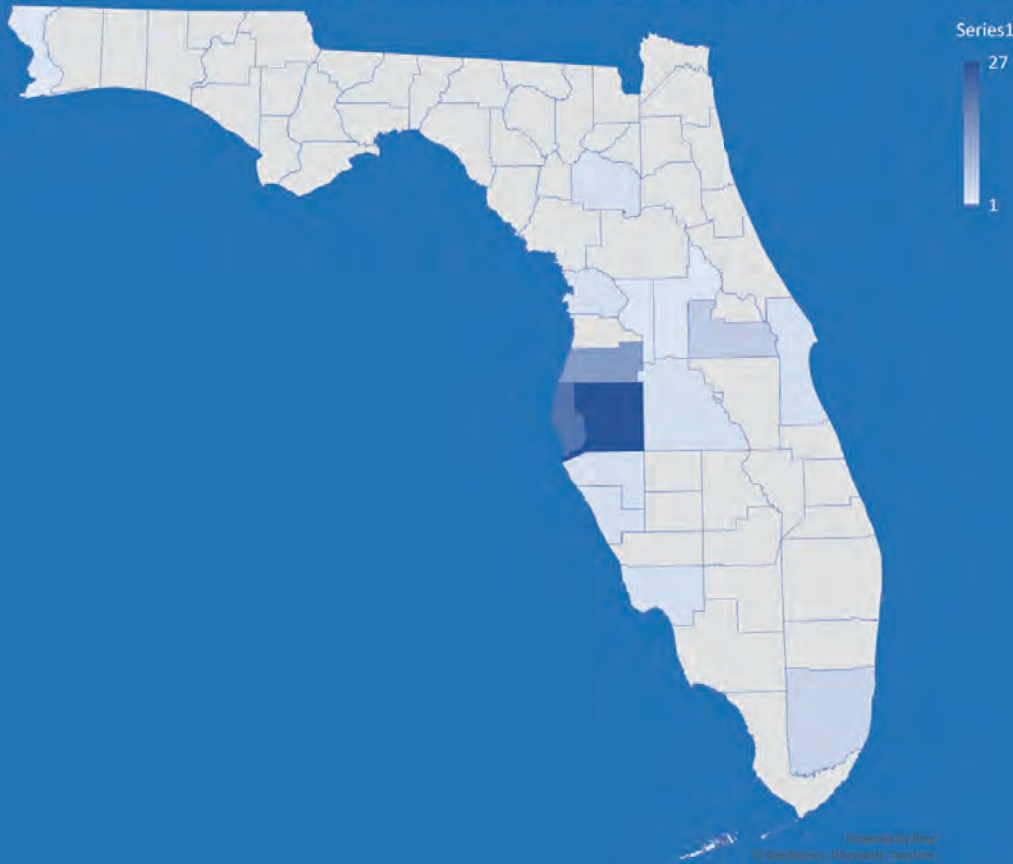
However, as seen in both maps, there were a noticeable number of visitors from South Florida and areas on Florida's east coast
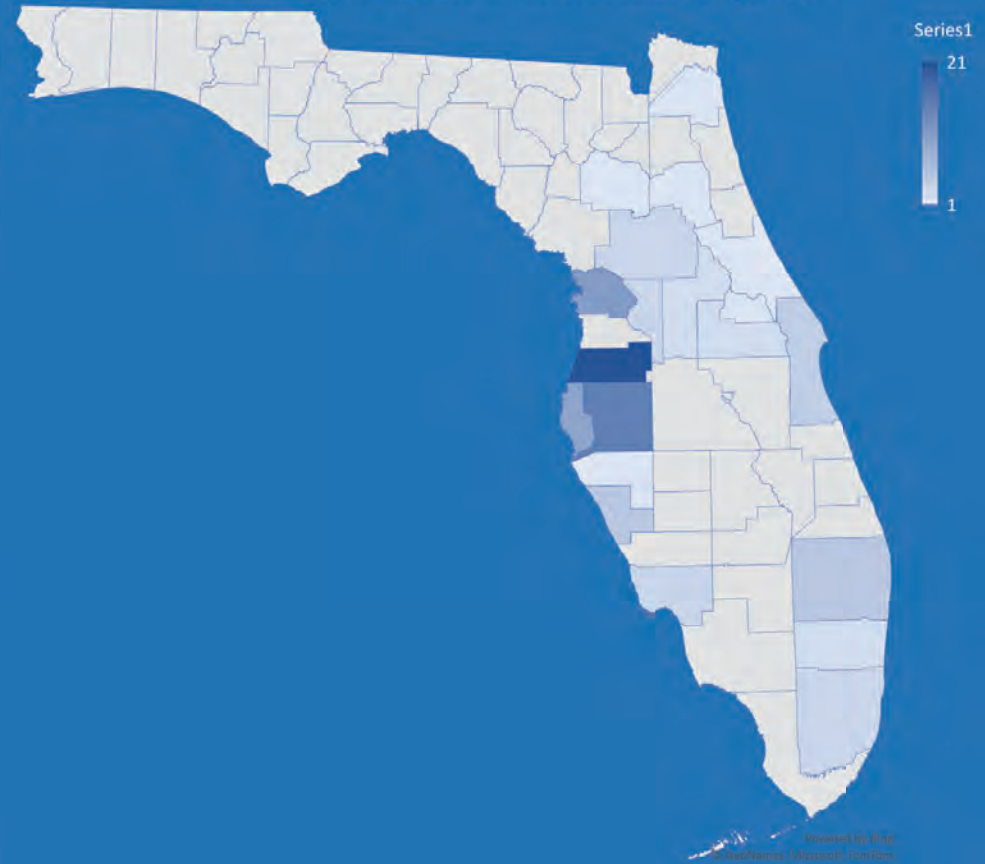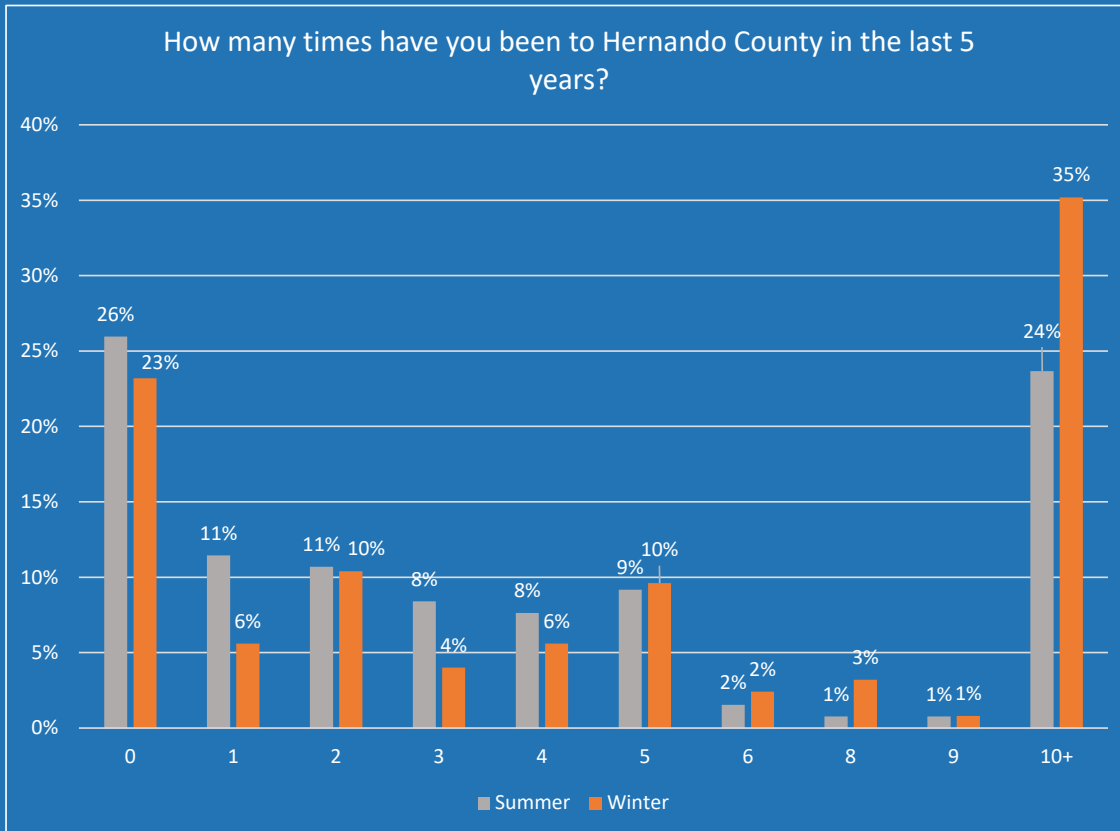
Location of Respondents: Florida Residents

Summer: Where is home?: Florida residents (n= 88)

Winter: "Where is home?" Florida resident (n=95)

Prior

Visitation

How many times have you been to Hernando County in the last 5 years?

During both seasons, a majority of visitors reported visiting the county 3 times or more in the last 5 years

This is a good sign that visitors are satisfied enough with their visits to keep returning.

Around a quarter of each sample was visiting Hernando County for the first time

Field Research Perceptions
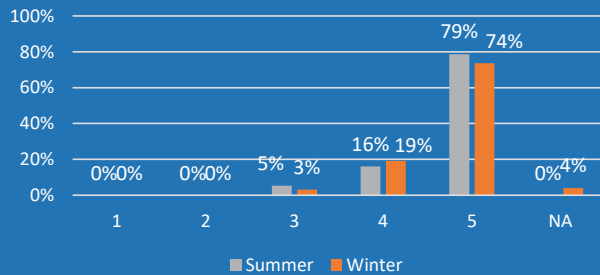
78%
Five-Star
Visit Satisfaction

50%
Go Home
After Visiting

29%
Outside FL
Visitors

On a scale from 1 to 5, with 1 being very dissatisfied and 5 being very satisfied, how satisfied are you with your experience in Hernando County?

- 1: Summer 0%, Winter 0%
- 2: Summer 0%, Winter 0%
- 3: Summer 5%, Winter 3%
- 4: Summer 16%, Winter 19%
- 5: Summer 79%, Winter 74%
- NA: Summer 0%, Winter 4%

■ Summer ■ Winter

Winter Dispatches: Are you staying overnight in the County or do you plan on driving home after the event?

- Driving home: 50.4%
- Staying overnight: 49.6%

■ Driving home ■ Staying overnight

Where is home?

- Florida Residents: 71%
- Out-of-state Residents: 29%
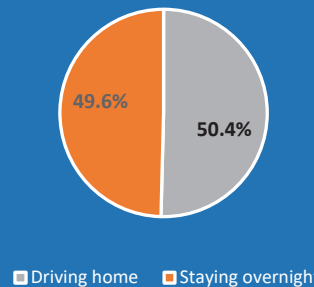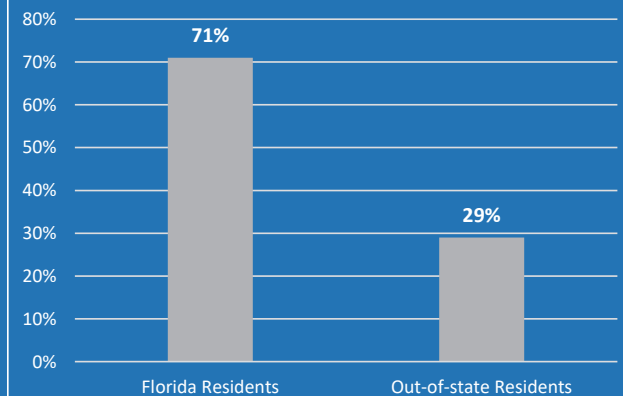
Field Research Brand Associations

We asked visitors to choose between pairs of words that describe the destination:

61% "Easygoing"
Over "Adventurous"

89% "Scenic"
Over "Lively"

87% "Relaxed"
Over "Outgoing"

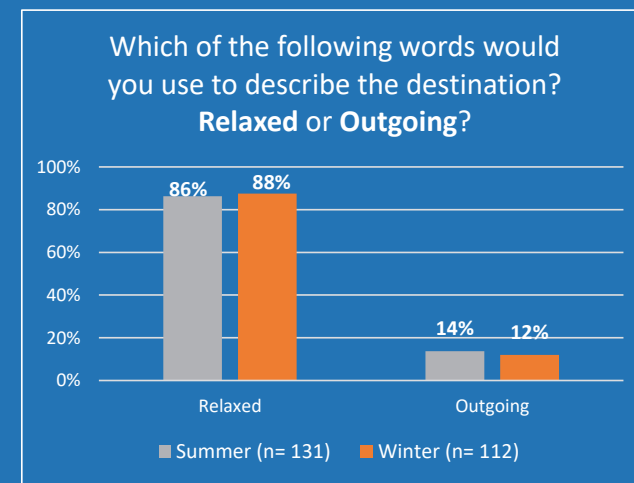---

Which of the following words would you use to describe the destination? Adventurous or Easygoing?

	Easygoing	Adventurous
Summer	56%	44%
Winter	69%	31%

Summer (n= 131) Winter (n=108)

Which of the following words would you use to describe the destination? Scenic or Lively?

	Scenic	Lively
Summer	86%	14%
Winter	92%	8%

Summer (n= 131) Winter (n= 116)

Which of the following words would you use to describe the destination? Relaxed or Outgoing?

	Relaxed	Outgoing
Summer	86%	14%
Winter	88%	12%

Summer (n= 131) Winter (n= 112)

Brand Survey
Findings

In which U.S. State do you live?: Region (n= 1,532)

- 23%
- 25%
- 24%
- 27%

☐ Florida ☐ South ☐ Midwest ☐ Northeast
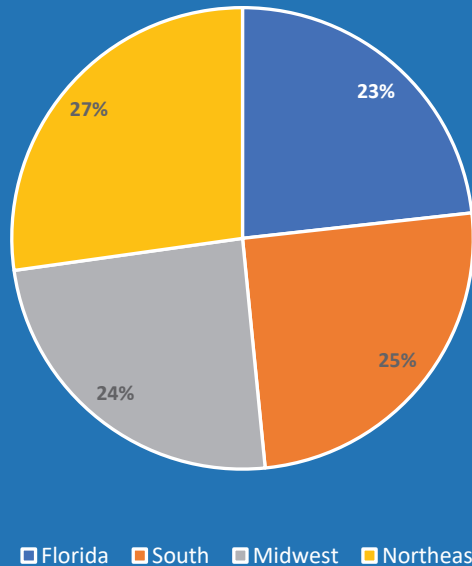
Panel Survey
Methodology

HCP collected a large amount of online survey responses from U.S. residents who either **had visited or considered visiting Central Florida**.

Type: **Online**
Responses: **1,532**
Margin of Error: **2.50%**
Dates in field: 12/21/2022 – January 12, 2023

Care was taken to ensure that the sample was a well-balanced mixture of the following demographics:
- Geography
- Gender
- Age
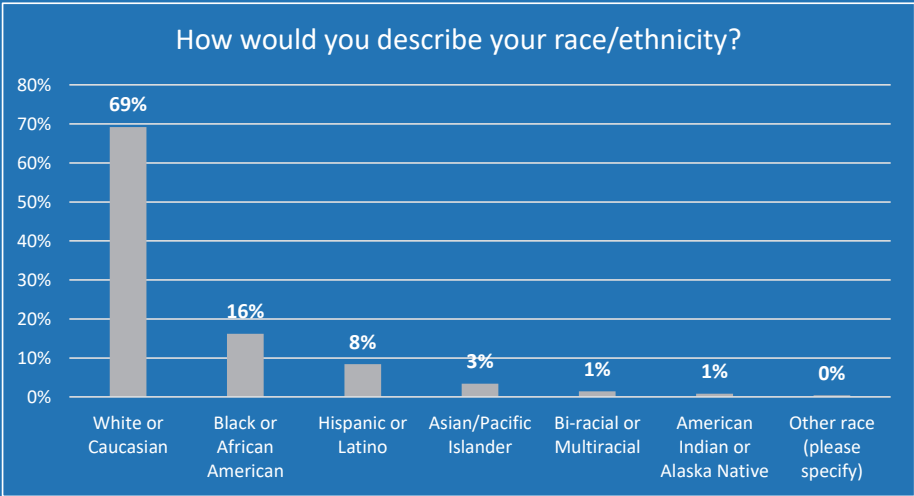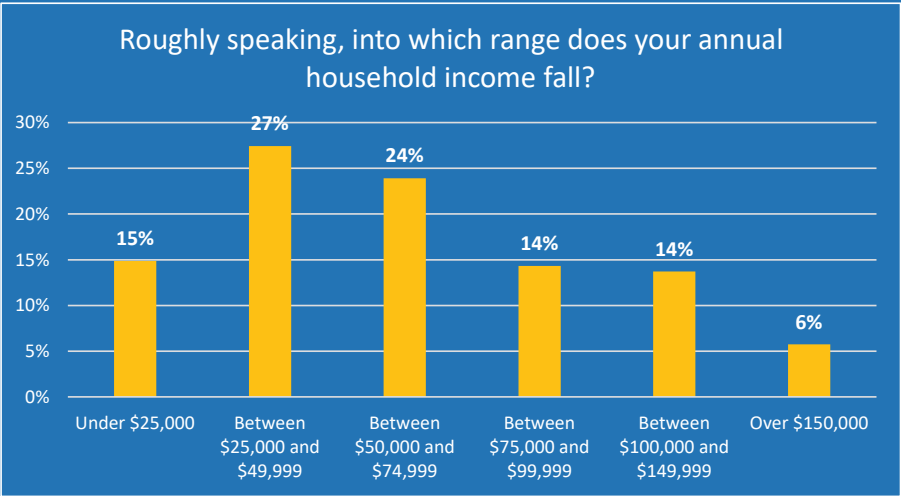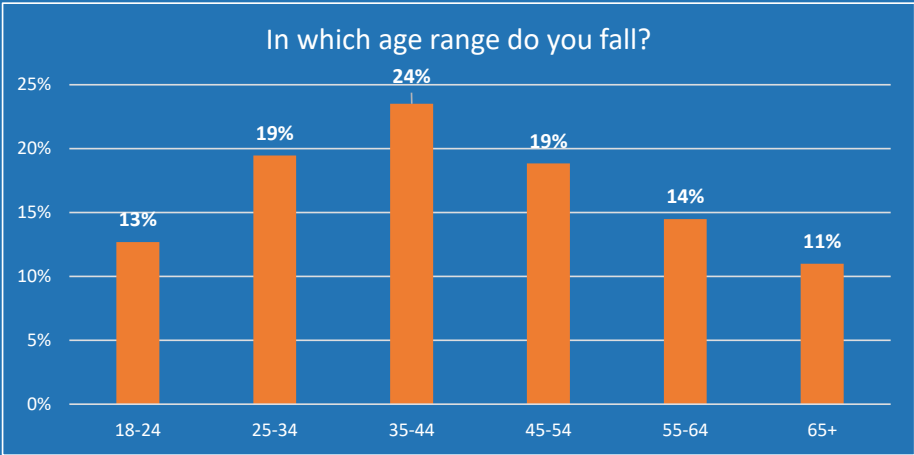- Race/Ethnicity
- Income

Sample Demographics

What is your gender?

- 41% Male
- 59% Female

■ Female ■ Male

In which age range do you fall?

Age Range	Percentage
18-24	13%
25-34	19%
35-44	24%
45-54	19%
55-64	14%
65+	11%

Roughly speaking, into which range does your annual household income fall?

Income Range	Percentage
Under $25,000	15%
Between $25,000 and $49,999	27%
Between $50,000 and $74,999	24%
Between $75,000 and $99,999	14%
Between $100,000 and $149,999	14%
Over $150,000	6%

How would you describe your race/ethnicity?

Race/Ethnicity	Percentage
White or Caucasian	69%
Black or African American	16%
Hispanic or Latino	8%
Asian/Pacific Islander	3%
Bi-racial or Multiracial	1%
American Indian or Alaska Native	1%
Other race (please specify)	0%

Visitation to **Florida**

Which places did you visit or consider visiting in Central Florida? Please type as many as you can recall in the comment box below. (n= 1,532)

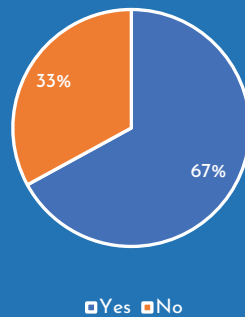| Place	Percent
Orlando/Disney	72%
Tampa Bay	34%
Other Parts of Florida	14%
Space Coast/Northwest Coast of Florida	12%
South Florida	10%
General Attractions/Other	8%
Nearby/In Hernando County	2%
Friends/Family	1%
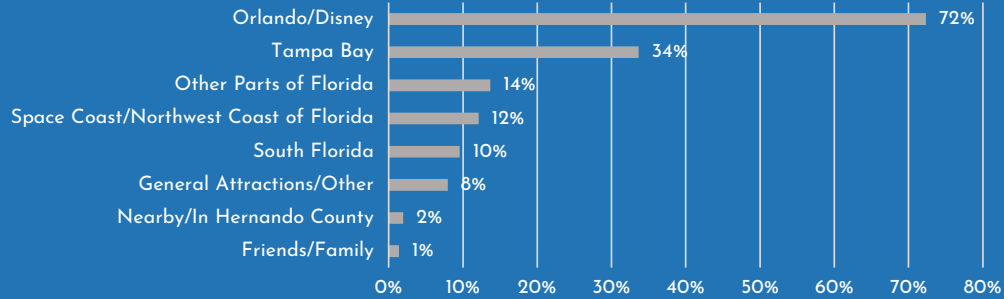
Have you actually visited any part of Central Florida in the past five years? (n= 1,532)

- 33% No
- 67% Yes

□Yes □No

A majority of respondents reported visiting or expressed interest in visiting the Orlando/Disney area.
- Only about 2% stated they had visited or expressed interest in visiting Hernando County

Overall, two-thirds of the sample reported actually visiting Central Florida in the last 5 years
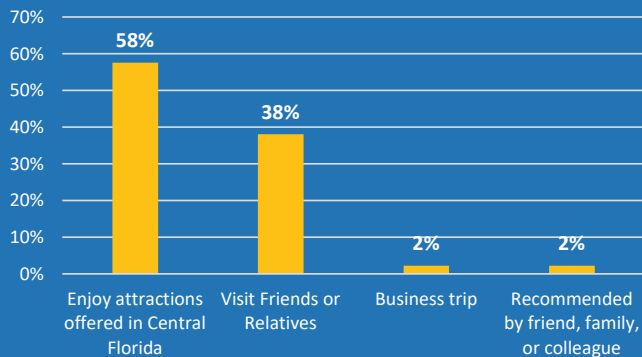
Field Research Brand Associations

58%
Visited
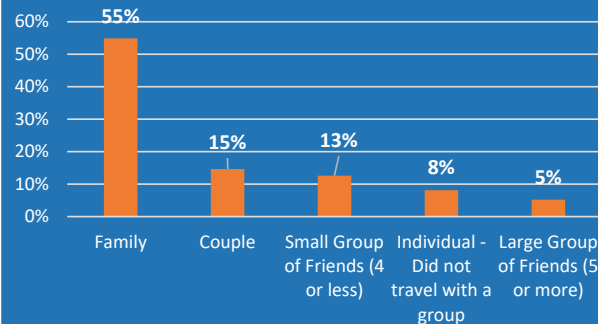For a Florida Experience

55%
Family-focused
Travel Groups

7%
Prior Visitation
To Hernando County

What was the primary reason that you visited Central Florida? (n= 907)

- Enjoy attractions offered in Central Florida: 58%
- Visit Friends or Relatives: 38%
- Business trip: 2%
- Recommended by friend, family, or colleague: 2%

What type of group were you with when you visited Central Florida most recently? (n=907)

- Family: 55%
- Couple: 15%
- Small Group of Friends (4 or less): 13%
- Individual - Did not travel with a group: 8%
- Large Group of Friends (5 or more): 5%

Which areas have you actually visited in Central Florida in the past 5 years? Select all that apply. (n=912)

- Orange and Osceola Counties:…: 73%
- Hillsborough and Pinellas…: 46%
- Volusia County: Daytona…: 31%
- Brevard County: Cape…: 27%
- Polk County: Lakeland/ Winter…: 18%
- Pasco County: Wesley Chapel/…: 13%
- Citrus County: Crystal River/…: 10%
- Hernando County:…: 7%

Visitation to
Hernando County

A third of respondents who reported visiting Hernando County had friends or relatives that lived in the area

- More than half of respondents heard about Hernando County through word-of-mouth compared to advertisements

How did you hear about Hernando County/ Brooksville / Weeki Wachee/ Florida's Adventure Coast? (n= 65)

Category	Percentage
Friends or Relatives in/around Hernando County	34%
Friends and Relatives Near You	28%
Social Media	17%
Travel Website	11%
Other (please specify)	8%
News or Blog Article	2%
Digital Advertisement	2%

Experiences in Hernando County

62%
Natural Aspects
Best Part of Hernando County
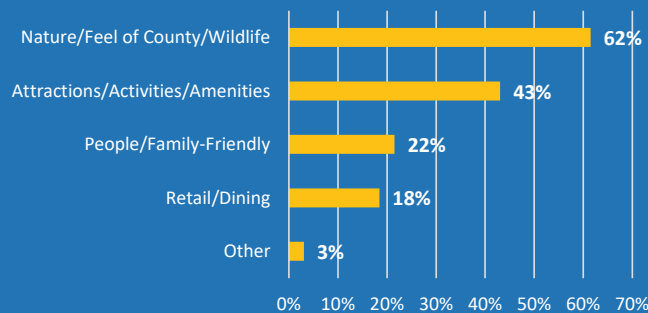
46%
No Problems
With their visit to the county

88%
Interested
In Returning to Hernando County

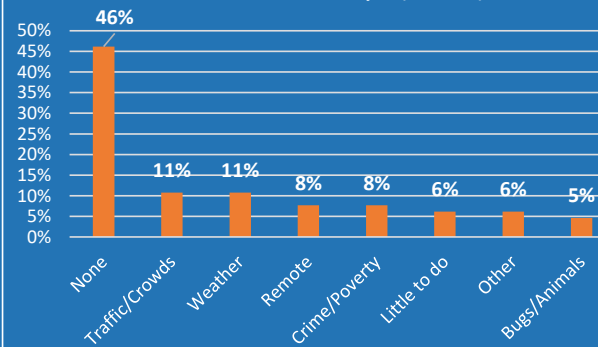In a few brief words, what were the best parts about your experience in Hernando County? (n= 65)

Nature/Feel of County/Wildlife	62%
Attractions/Activities/Amenities	43%
People/Family-Friendly	22%
Retail/Dining	18%
Other	3%

0% 10% 20% 30% 40% 50% 60% 70%

In a few brief words, what were the worst parts about your experience in Hernando County? (n= 65)

None	46%
Traffic/Crowds	11%
Weather	11%
Remote	8%
Crime/Poverty	8%
Little to do	6%
Other	6%
Bugs/Animals	5%

How interested are you in returning to Hernando County again in the future? (n=65)

Not at all interested	3%
Not very interested	9%
Very interested	62%
Extremely Interested	26%

Have you ever heard of any of the following places/destinations in Central Florida? Please select all that apply. (n=1,284)

- Florida's Adventure Coast: 43%
- Florida's Nature Coast: 42%
- Citrus County: 32%
- Weeki Wachee: 25%
- Hernando County: 22%
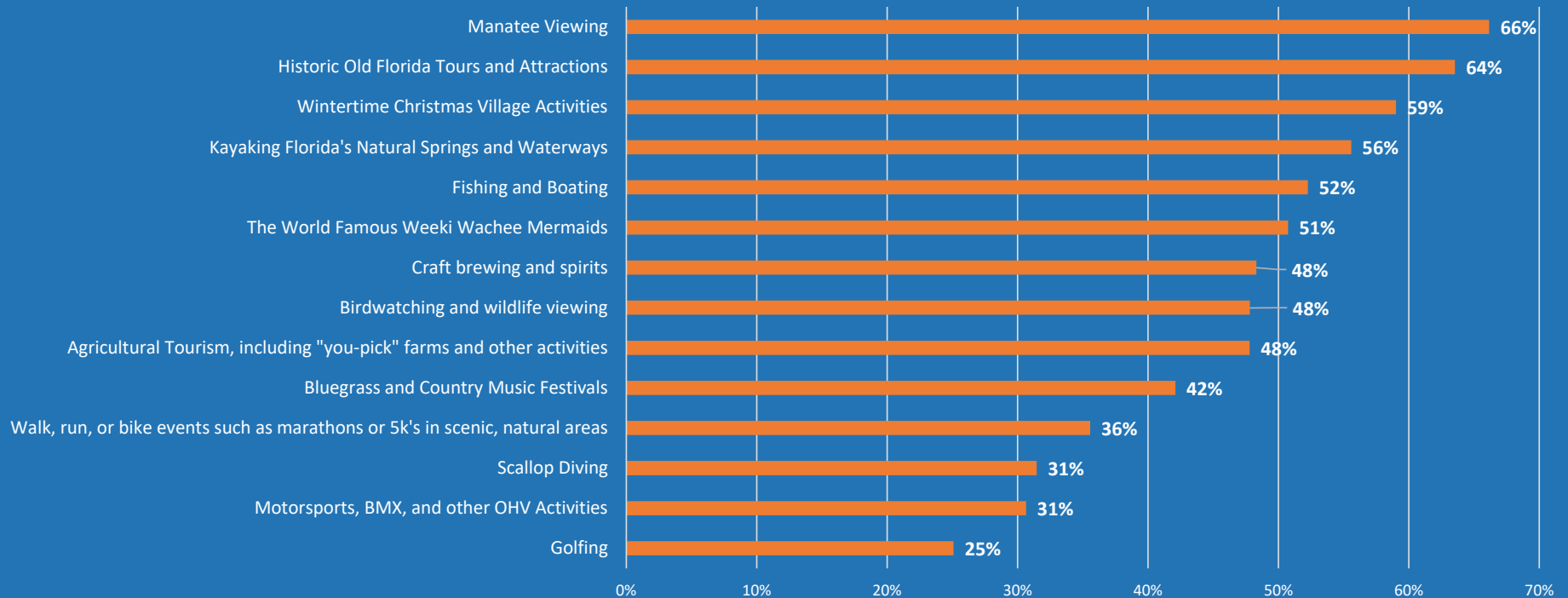- Brooksville: 20%
- None of the Above: 25%
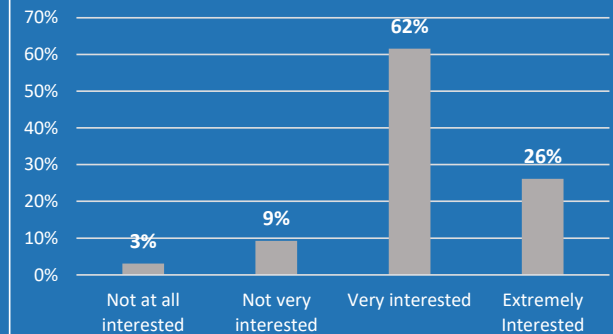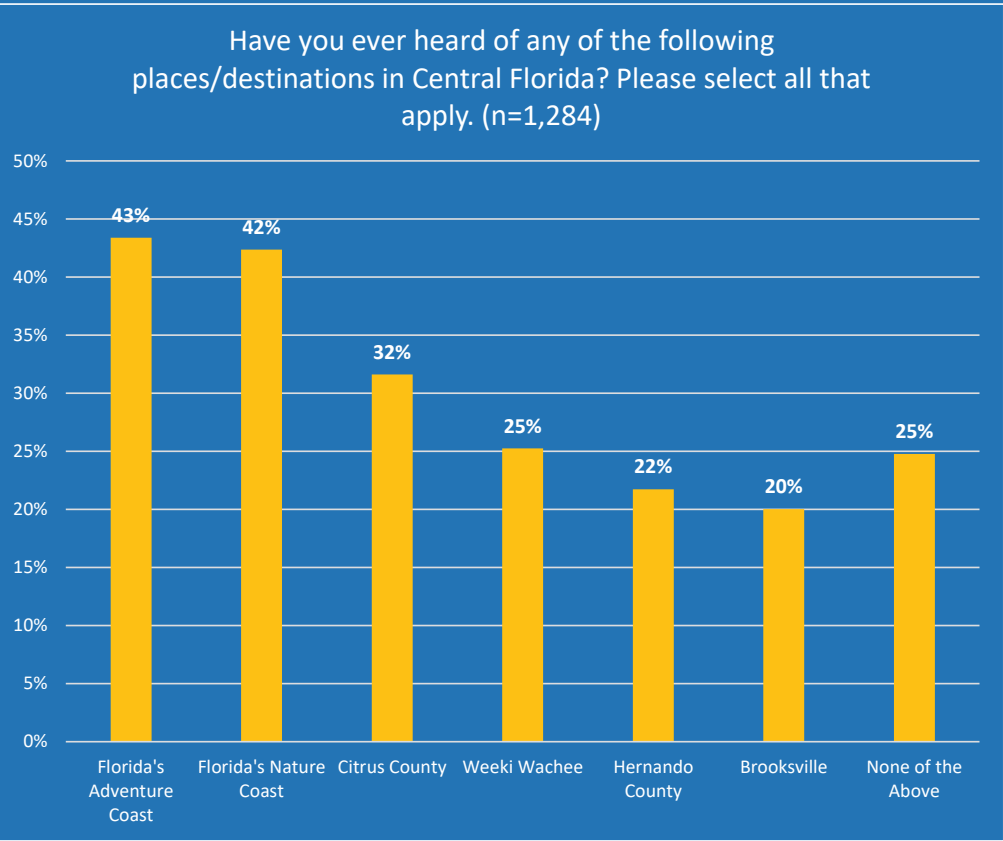
Brand
Recognition

"Florida's Adventure Coast" and "Florida's Nature Coast" were the most recognized name out of all the names provided

Prospect's Interests

Considering the following activities below, which are you most interested in for potential future visits to Central Florida?: Percentage of Interested

Activity	Percentage
Manatee Viewing	66%
Historic Old Florida Tours and Attractions	64%
Wintertime Christmas Village Activities	59%
Kayaking Florida's Natural Springs and Waterways	56%
Fishing and Boating	52%
The World Famous Weeki Wachee Mermaids	51%
Craft brewing and spirits	48%
Birdwatching and wildlife viewing	48%
Agricultural Tourism, including "you-pick" farms and other activities	48%
Bluegrass and Country Music Festivals	42%
Walk, run, or bike events such as marathons or 5k's in scenic, natural areas	36%
Scallop Diving	31%
Motorsports, BMX, and other OHV Activities	31%
Golfing	25%

Planning Phase Approach

- **Stakeholder Interviews:**
  - HCP conducted 13 individual one-on-one stakeholder interviews with hoteliers, community leaders, key tourism-serving businesses, and other high-profile stakeholders in Hernando County. Additionally, 28 more stakeholders participated in an online survey asking similar questions

- **Strategic Planning Stakeholder Workshop:**
  - A two-hour workshop on February 28, 2023, was facilitated, enabling key stakeholders to review research findings, discuss critical challenges, and provide recommendations for Hernando County.

- **Strategic Planning Staff Workshop:**
  - On March 16, 2023, an all-day workshop was organized, engaging Hernando County staff in Tourism and Economic Development. This session allowed a comprehensive review of previous findings and discussions on the key goals and objectives of the new strategic plan.

Stakeholder
Insights

Stakeholder Insights

Stakeholders felt that "Adventure Coast" does not accurately describe **today's** Hernando County, and feel that adoption of the term is weak

Stakeholders identified Weeki Wachee River and State Park as the primary tourism driver, but also noted that it is already overused

Stakeholders argued that large amounts of recent and upcoming development threatens Hernando's "Old Florida" and natural appeals

Stakeholders Identified a weak hotel inventory as a negative factor affecting the market

Stakeholder Insights (Cont.)

Stakeholders broadly support the notion that Mermaids are crucial to Hernando County's image and future

Stakeholders identified Citrus County as the primary competitor for Hernando County Tourism

Stakeholders believed that a mixture of new public and private developments are necessary to increase the number of tourist activities and increase existing attractions' capacity

Stakeholders were supportive of boosting sports tourism and meetings/events, but cited hotel inventory as the primary block to that

Lessons from Sports Tourism -
Pasco County

- Pasco County's sports tourism, particularly Wiregrass Ranch Sports Campus, illustrates the potential risk versus reward in substantial investments.

- Despite the initial vision of attracting sports tourism, the company managing the facility focused on local events, leading to less overnight stays at the sports park hotel than expected.

- Competition among sports complexes in the Tampa Bay area and insufficient hotel inventory in Hernando County could pose challenges in sports tourism.

- Constructing a new sports complex may require significant capital investment without necessarily yielding the anticipated financial returns.

Lessons from Convention Centers -
Pinellas County

- A sufficient inventory of varied hotel rooms is essential to support large conventions and meetings, a requirement currently not met by Hernando County.

- The success of convention tourism is not guaranteed by the supply of rooms alone. Other factors like recruitment and retention of large-scale events, state-of-the-art facilities, and competition from established convention destinations also matter.

- Pinellas County's struggle in finding a suitable location for a convention space serves as a notable example of these difficulties.

- It may be prudent for Hernando County to invest in initiatives promoting hotel development and recruitment efforts with incentives for meeting and event spaces, offering a more diversified approach to tourism development.

Destination Stewardship

- Based on sustainability, environmental consciousness, and community pride

- Aims to preserve and promote Hernando County's natural assets

- Education and initiatives for eco-friendly tourism practices

Destination Stewardship Objectives (1)

Emphasize Quality over Quantity of Visitors in Promoting Hernando County

- Objective: Prioritize high-value visitors for sustainable tourism

- Description: These visitors appreciate Hernando County's unique offerings and are from niche markets like eco-tourism, cultural tourism, and gastronomy tourism

- KPI: Increase in average tourist spending, length of stay, and satisfaction scores

Invest in Focused Development of Enhanced Access to Natural Attractions

- Objective: Expand access to natural attractions while maintaining ecological balance

- Description: Projects may include more hiking/biking trails, water access points, guided tours, etc.

- KPI: Number of new or improved access points, increase in visitation to natural attractions

Destination Stewardship Objectives (2)

Recruit New, Higher-End Hotels with Meeting and Events Emphasis

- Objective: Attract investments in luxury accommodation and business-oriented spaces

- Description: Collaborate with potential investors and hotel chains for meeting rooms, event facilities, luxury stays

- KPI: Increase in the number of high-end hotels and event spaces, increase in events booked

Further, Promote and Encourage Signature Events within Hernando County

- Objective: Foster festivals, sporting events, cultural experiences that reflect Hernando County's identity

- Description: Work with local organizations to publicize and make these events accessible to visitors

- KPI: Increase in the number of signature events and tourist visits, economic impact of these events

Destination Stewardship Objectives (3)

Invest in Beautification and Preservation of Hernando County's Urban Assets

- Objective: Enhance the county's urban appeal through beautification and preservation projects

- Description: Fund public art installations, development of green spaces, historic preservation efforts

- KPI: Number of beautification and preservation projects completed, increase in tourist satisfaction scores

Community Alignment

Overview of Community Alignment:

- Unison of various stakeholders around a common tourism vision

- Foster active community participation in decision-making procedures

- Ensure equitable sharing of tourism perks

Community Alignment Objectives (1)

Deepen Engagement with Local Business and Community Organizations

- Objective: Strengthen relationships with local businesses and community organizations

- Description: Collaborate with entities like local chamber of commerce for joint initiatives, tourism growth

- KPI: Number of joint initiatives, overall tourism growth, increased collaboration between the DMO and the chamber

Implement Resident Education Programs on the Value of Tourism

- Objective: Address misconceptions about tourism, foster a welcoming environment for visitors

- Description: Highlight economic and cultural benefits of tourism through workshops, seminars, and community events

- KPI: Number of educational programs conducted, improvement in resident sentiment towards tourism

Digital Conversion

Overview of Digital Conversion:

- Leveraging technology and online platforms for destination marketing

- Develop a robust digital marketing strategy

- Enhance digital visitor experience through mobile apps, interactive maps, virtual tours

Digital Conversion Objectives (1)

Reimagine the Welcome Center

- Objective: Transform the Welcome Center into an unmanned, technology-driven community center

- Description: Host programs to enlighten residents about tourism, integrate digital screens for real-time updates

- KPI: Number of educational programs conducted, improvement in resident sentiment towards tourism

Enhance Digital Storytelling

- Objective: Bring Hernando County's unique attractions to life through digital storytelling

- Description: Use videos, podcasts, and interactive maps to engage and capture the imagination of potential visitors

- KPI: Increase in content engagement, user-generated content, and digital conversions

Digital Conversion Objectives (2)

Support Partner Business Digital Marketing Efforts

- Objective: Work in tandem with the marketing efforts of local businesses and organizations

- Description: Promote co-op promotions, shared content, co-branded campaigns, social media takeovers, guest blog posts

- KPI: Increase in online visibility, web traffic, and social media engagement for both the DMO and partner organizations

THANK YOU

Contact Us

1101 Channelside Dr., Ste301
Tampa, FL 33602

813-318-0565

rallen@hcpassociates.com