



*Florida's*  
**ADVENTURE COAST**  
BROOKSVILLE ♦ WEEKI WACHEE

# FLORIDA'S ADVENTURE COAST FOUNDATIONAL RESEARCH SUMMARY

 **HCP**  
Research | Strategy | Marketing

# Contents

- Introduction..... 2
- Methodology..... 3
- Secondary Research Findings ..... 5
  - Tourist Development Tax..... 5
  - STR Occupancy and Revenue Data ..... 7
  - Google Analytics - Florida’s Adventure Coast ..... 12
  - Competitive Analysis..... 18
  - Literature Review..... 21
    - Rural Tourism ..... 21
    - Resistance to Rural Development..... 22
    - Heritage and Historical Tourism ..... 22
- Stakeholder Interviews Findings ..... 23
- Secondary Stakeholder Survey Findings..... 27
- Brand Awareness Survey (Panel) Findings..... 32
  - Initial Questions/Screening Questions..... 32
  - Experiences in Central Florida ..... 34
  - Experiences in Hernando County..... 38
  - Recognition of Hernando County ..... 41
  - Interest in Amenities and Activities..... 42
  - Demographics ..... 47
- Brand Perception Survey (Dispatch) Findings ..... 49
- Concluding Thoughts..... 61
- Next Steps..... 62
- References..... 63

## Introduction

Hernando County is a small, rural county located on the West-Central coast of Florida. Hernando County is currently home to 200,638 residents in the state of Florida (US Census Bureau, 2021) and resides about 45 minutes north of the Tampa Bay region, the third largest area in the state of Florida by population.

Hernando County is most notable for the Weeki Wachee Springs and the Weeki Wachee Mermaids, a show that has been produced at the park since 1947 (Weeki Fresh Water Adventures). However, Hernando County is also home to a variety of activities, events, and attractions with a heavy emphasis on outdoor recreational activities. The county focuses primarily on outdoor activities such as cycling, hiking, golfing, and wildlife watching. Visitors are also drawn to water-based activities like manatee viewing, boating, fishing, and scallop diving (Florida's Adventure Coast).

In 1991, Hernando County, along with the seven other Florida counties that sit in the "big bend" of Florida, worked together to market the region as Florida's Nature Coast (Nature Coasters). The focus of this multi-county marketing strategy was to emphasize the natural beauty and attractiveness of the area to out-of-market visitors. However, as the Gulf coastline developed more and population and tourism increased in the state, some parts of the Nature Coast began to create their own identities. Pasco County, the bordering county on the southern side of the Nature Coast, rebranded to "Florida's Sports Coast" to highlight the athletic and sports facilities for travel team sports opportunities in the county. In 2016, Hernando County rebranded as "Florida's Adventure Coast" to highlight the various active outdoor activities and adventures offered throughout the county.

Since the rebranding, several notable events have occurred that have impacted the tourism industry. Most notable was the COVID-19 pandemic, which decimated tourism across the world for varying portions of 2020 and 2021. In addition, the region around Hernando County, most notably the Tampa Bay region, has grown tremendously since the rebrand. These events and more have led to conflicting visions on how to advance the destination from various elected officials and other stakeholders. These conflicting viewpoints and decisions led to the design of a destination development strategic planning process.

This document focuses on the findings from all parts of the phase one research methods.

## Methodology

To create this report, we employed a mixture of quantitative and qualitative research methods to uncover the perceptions of Hernando County's tourism and the associated brand. Four different research methods were used in the creation of this foundational research summary: stakeholder interviews, an online panel study, dispatch intercept interviews, and secondary research. From this data, we provide some preliminary analyses that will help guide discussions during the second phase of the strategic planning process.

### Stakeholder Interviews

Stakeholder interviews were conducted with a group of key stakeholders identified by Hernando County tourism that will play an important role in the future of tourism in the county. This group included business owners, current county commissioners, other elected officials, and more. During this process, we attempted to reach hoteliers in Hernando County. However, due to unwillingness and unavailability to be interviewed, they are not included in this section. Overall, 13 stakeholder interviews were completed during this process.

In addition to one-on-one stakeholder interviews, an online stakeholder survey was sent out by the tourism department to businesses and stakeholders who did not participate in the one-on-one interviews. This process also allowed stakeholders of various sizes in the county to provide their feedback on perceptions of tourism in Hernando County. In total, 28 stakeholders completed the online stakeholder survey. This included responses from individuals in retail, lodging, experience, and professional services.

### Brand Awareness Online Panel Survey

A brand awareness study of 1,400 adults in the United States was conducted between December 21, 2022, and January 12, 2023. Survey results were collected through a third-party online panel company. Prior to collection, four regions were identified as the target areas for this study. At least 350 survey responses were obtained from each of the following four US regions: Florida, South, Midwest, and Northeast. The geographic boundaries of these areas were based on standards from the United States Census Bureau. After initial data collection, the data were reviewed to ensure respondents matched certain criteria. These criteria included interest or past visitation to Central Florida and place of residence. Responses that did not meet these criteria were removed from the data set. This process was repeated until quotas for each region of the study were fulfilled. In total, 1,532 completed responses were collected and analyzed.

### Brand Perception Dispatch Interview Survey

We also conducted a brand perception survey of 250 out-of-county visitors to various events and attractions in Hernando County. Two different rounds of dispatch survey interviews were conducted. The first round of surveys was conducted in July and August 2022. The second round of surveys was conducted in January and February 2023. These timeframes were done to reach different types of visitors to the county to measure overall perceptions of the brand and to see if any perceptions of the county or brand changed based on the time of visitation. Each round of dispatch interviews required at least 125 responses. Following the conclusion of data collection, we obtained 256 completed surveys. During the first round of dispatch surveys, 131 surveys were completed by out-of-county visitors at two locations in Hernando County: the Weeki Wachee Springs State Park Kayak Launch area and the Bayport Public Boat Ramp. During the second round of dispatch surveys, 125 surveys were completed by out-of-county visitors at 5 locations: Lead Foot City, Foggy Longbottom Folk Music Festival, the Weeki Wachee Springs State Park Kayak Launch area, Croomfest, and the Florida Mermaid Trail Festival.

### Secondary Research

To round out this process, we considered data from various other data sources. These included occupancy rates and revenue figures from county hotels and other lodging options between October 2018 and January 2022. We also reviewed the amount of tourist development tax

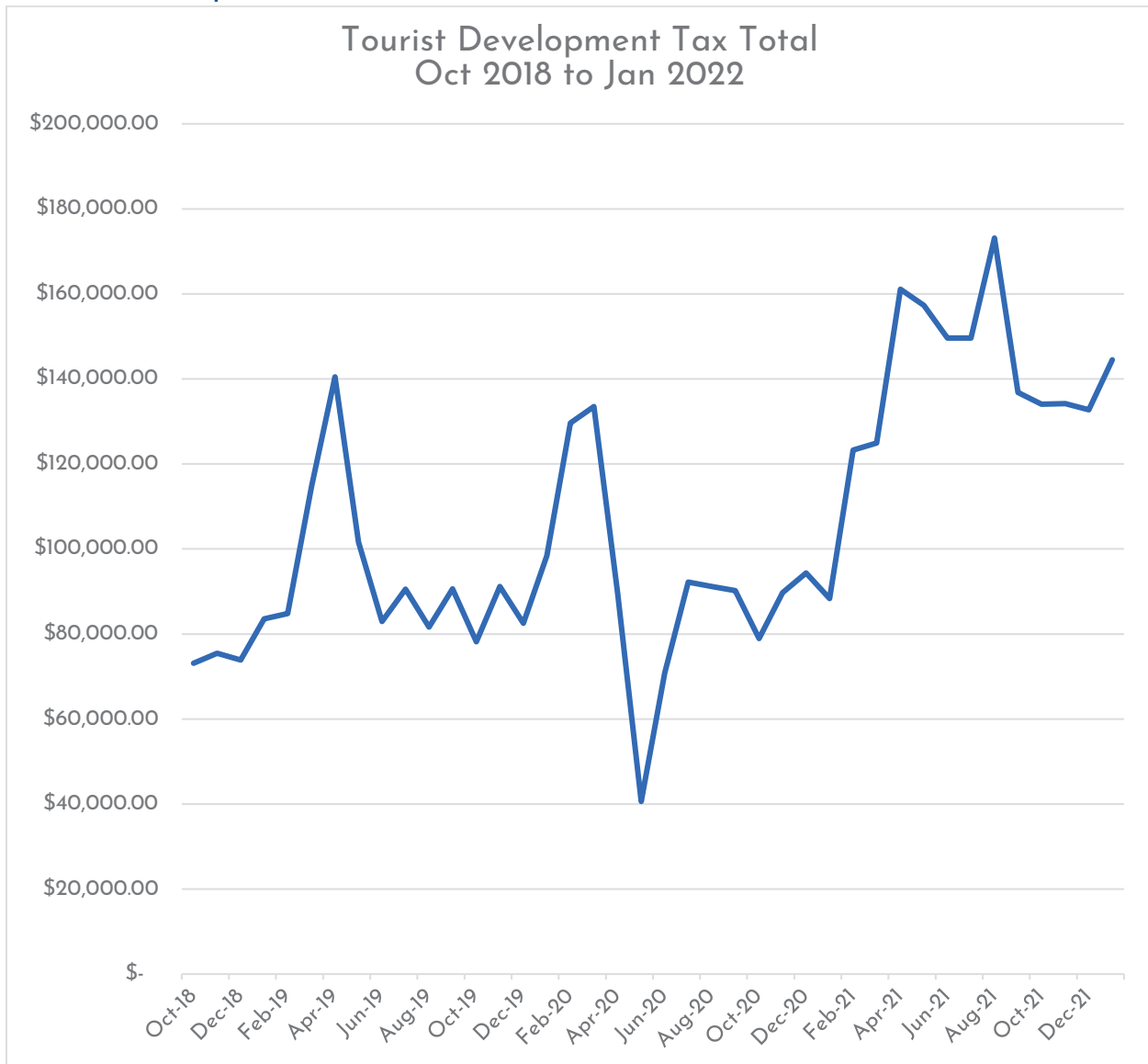
dollars coming from various lodging options in Hernando County. We examined Google Analytics reports about the county's tourism website and its overall performance from November 2020 to January 2023. This review included the number of visitors to the site, which states and cities in Florida users were accessing the page from, the top pages, and acquisition.

The secondary research process also included a competitor analysis, which focused on other counties in Florida that may compete with Hernando County for tourism. The list of county competitors was created through discussion with department leaders and a review of various counties across the state by reviewing sections of their respective county tourism pages. After analysis, 9 counties were considered direct competitors to Hernando County based on makeup, location, and amenities and attractions offered in the county.

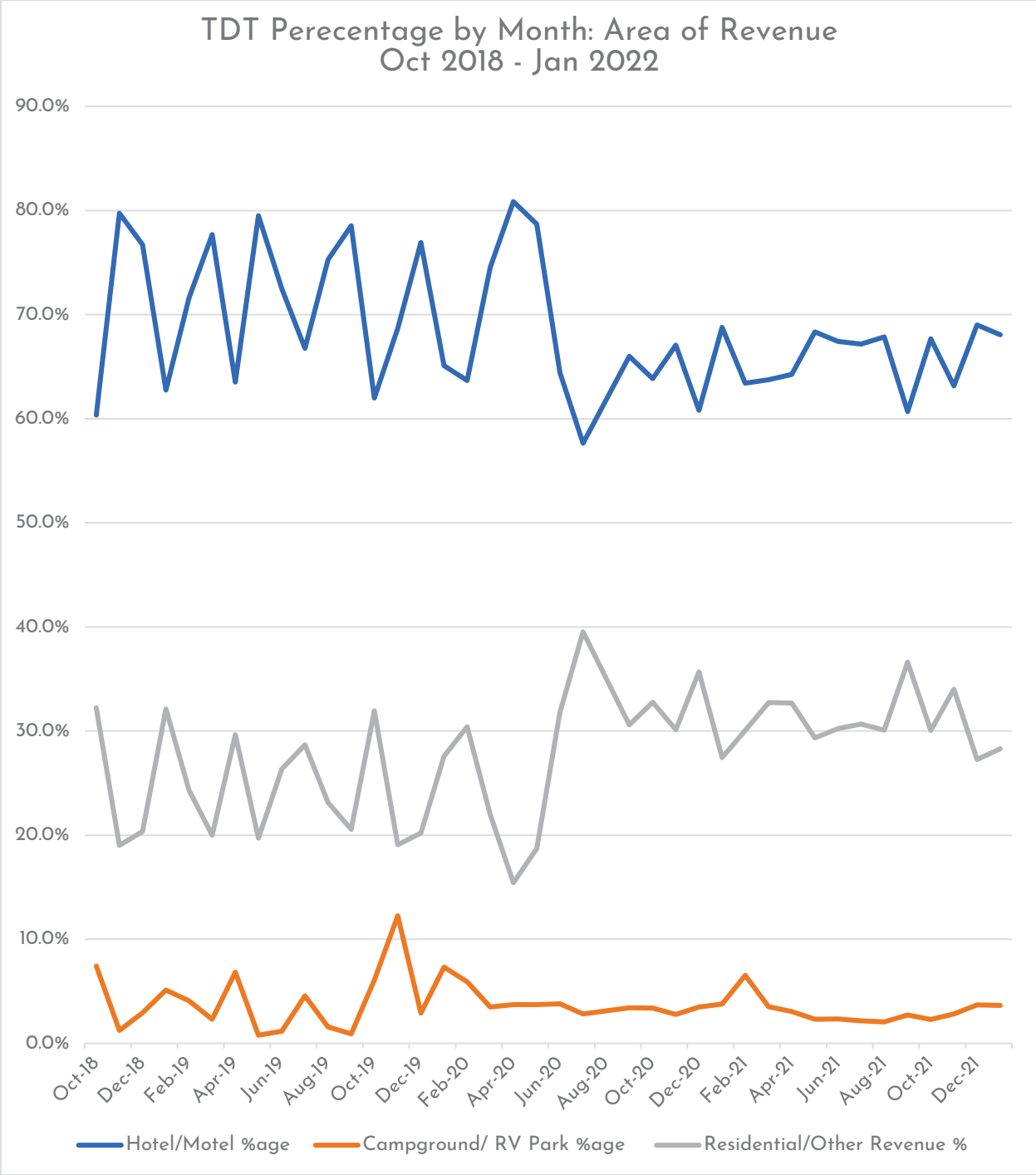
Lastly, we reviewed academic and media articles focused on rural tourism development, resistance to rural development, and heritage/historical tourism from other cases in the United States.

## Secondary Research Findings

### Tourist Development Tax

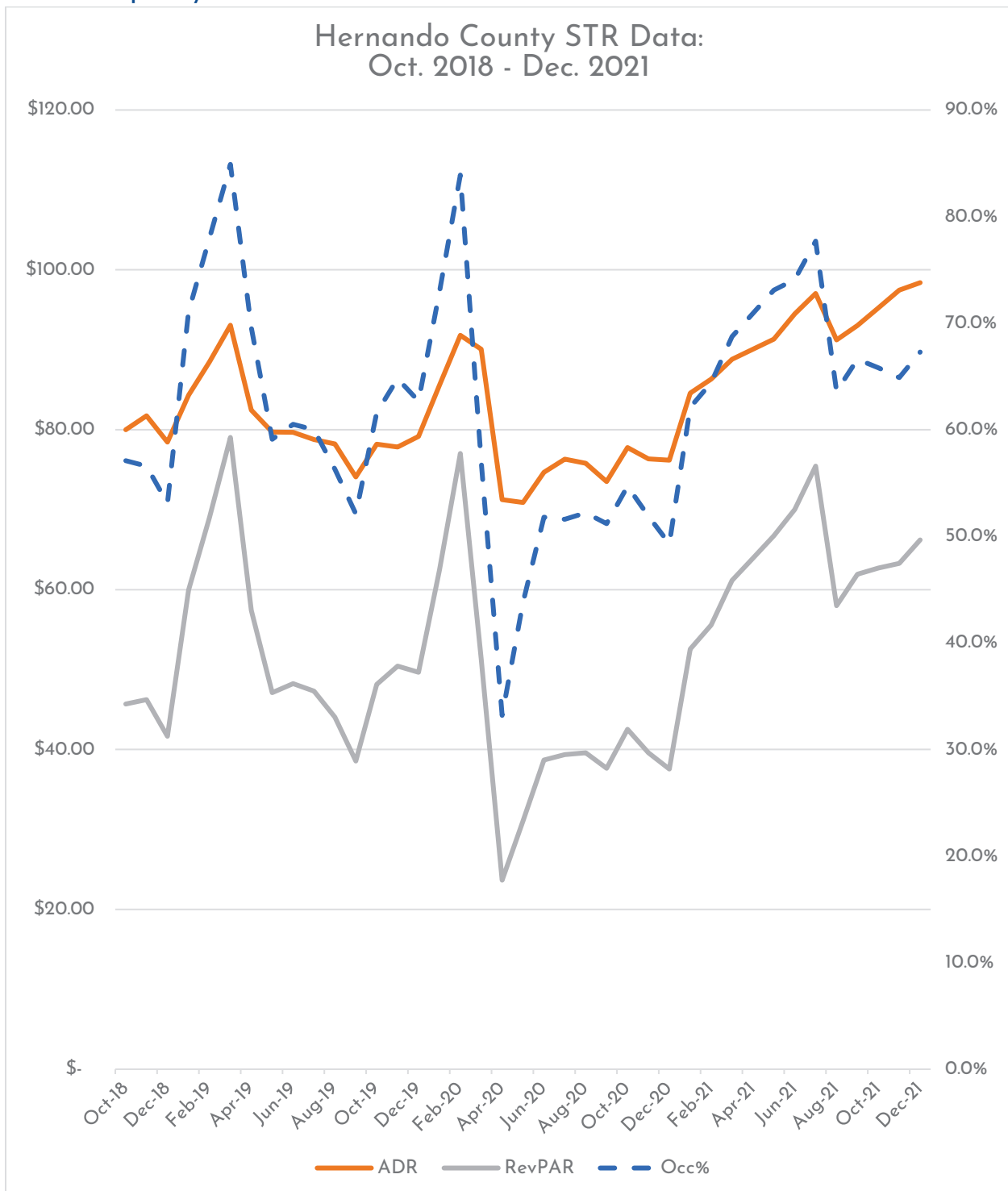


Between October 2018 and January 2022, Hernando County brought in an average of \$106,343.12 in tourist development tax (TDT) per month. Development tax brought in ranged from \$40,611.09 to \$173,139.00. However, as the graph above indicates, there is a significant level of variability in the amount of TDT revenue brought into the county. There has been a general increase since January 2021 and March 2021 saw the first levels of TDT revenue above March 2020 (the month when health and safety measures related to COVID-19 began being implemented in most US states). However, there continue to be seasonal effects on the amount of TDT revenue collected by the county.



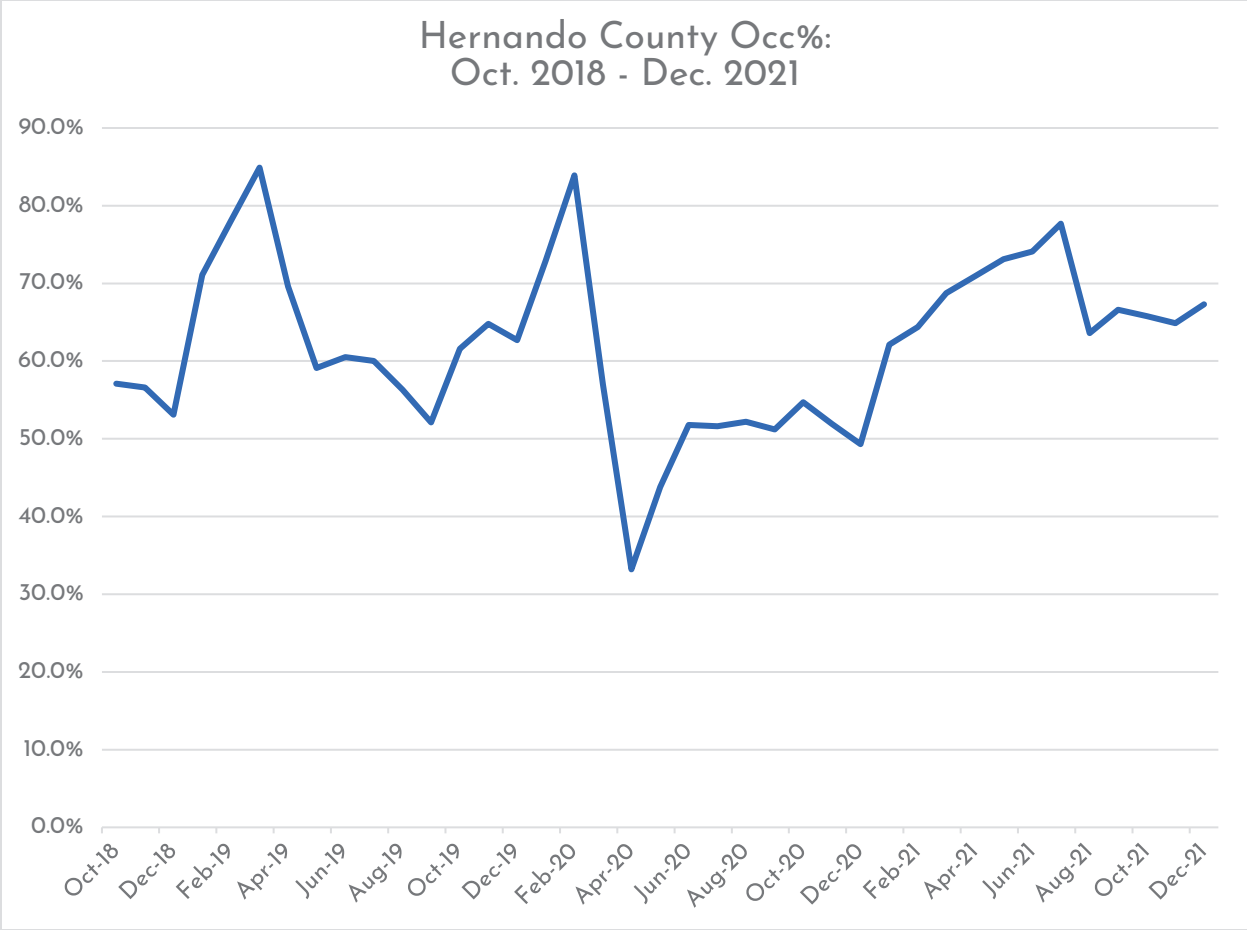
In all months, the largest percentage of the tourist development tax comes from hotels and motels in the county. This portion of the TDT ranges from 57.6% (July 2020) to 80.9% (April 2020). However, the percentage of residential and other TDT has made up a larger percentage of monthly TDT revenue since August 2020. Overall, between a quarter and a third of the tourist development revenue comes from residential and other lodging. Revenue from campgrounds and RV parks has remained relatively consistent during this time, with one notable outlier (November 2019) being above 10% of monthly TDT revenue.

## STR Occupancy and Revenue Data



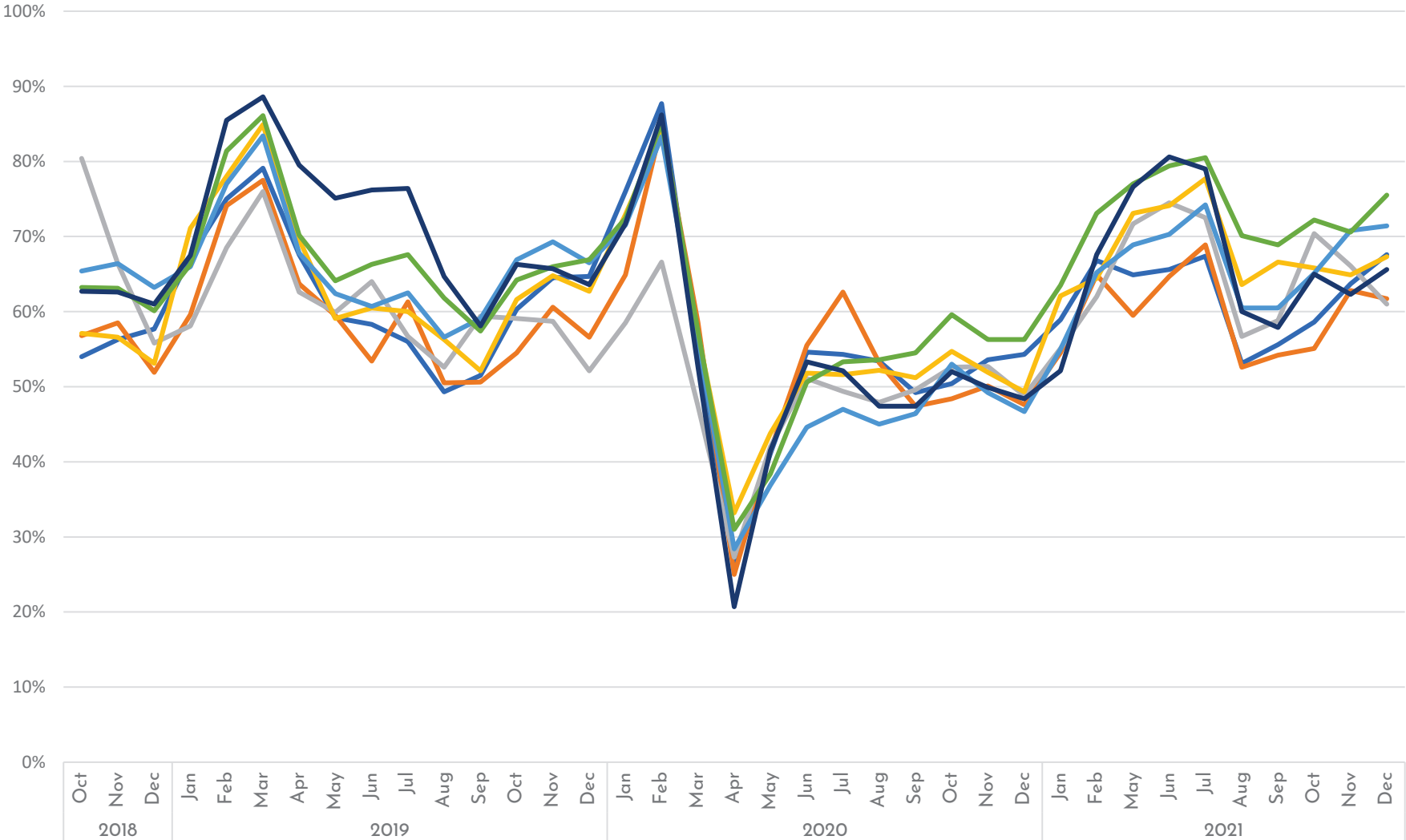
The occupancy and revenue data from county hotels show more consistency than the TDT data, but seasonality can still be seen overall. In general, the average daily rate (ADR), the revenue per available room (RevPAR), and the occupancy percentage (Occ%) all trend similarly, with ADR showing a steady but small growth between October 2018 and December 2021.





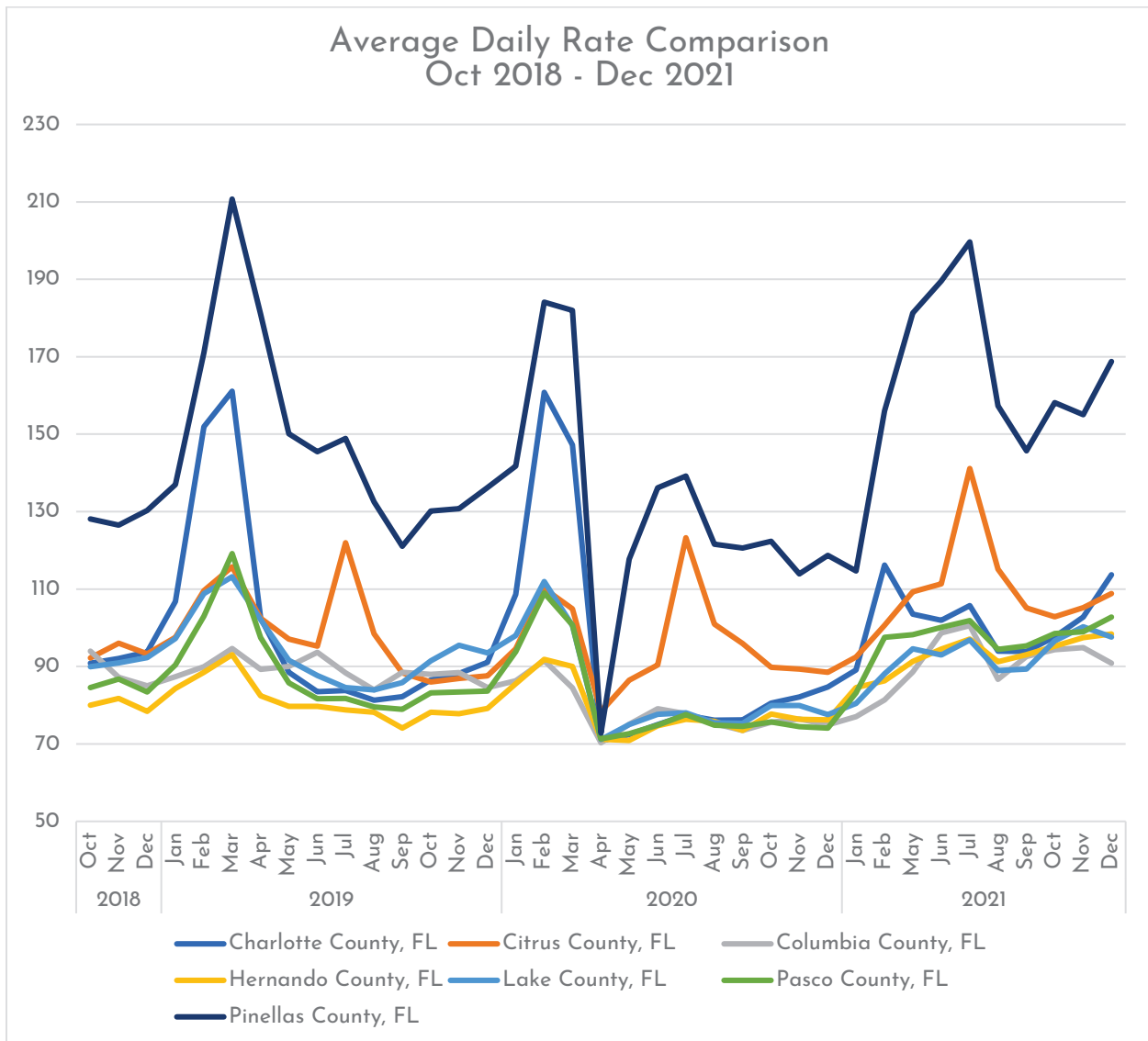
The occupancy of Hernando County hotels has varied over this time. The most notable drop comes between March and April 2020 due to health and safety restrictions related to the COVID-19 pandemic. Since then, there has been increased occupancy, with some seasonality trends during this time.

### Occupancy Percentage Comparison: Oct 2018 - Dec 2021



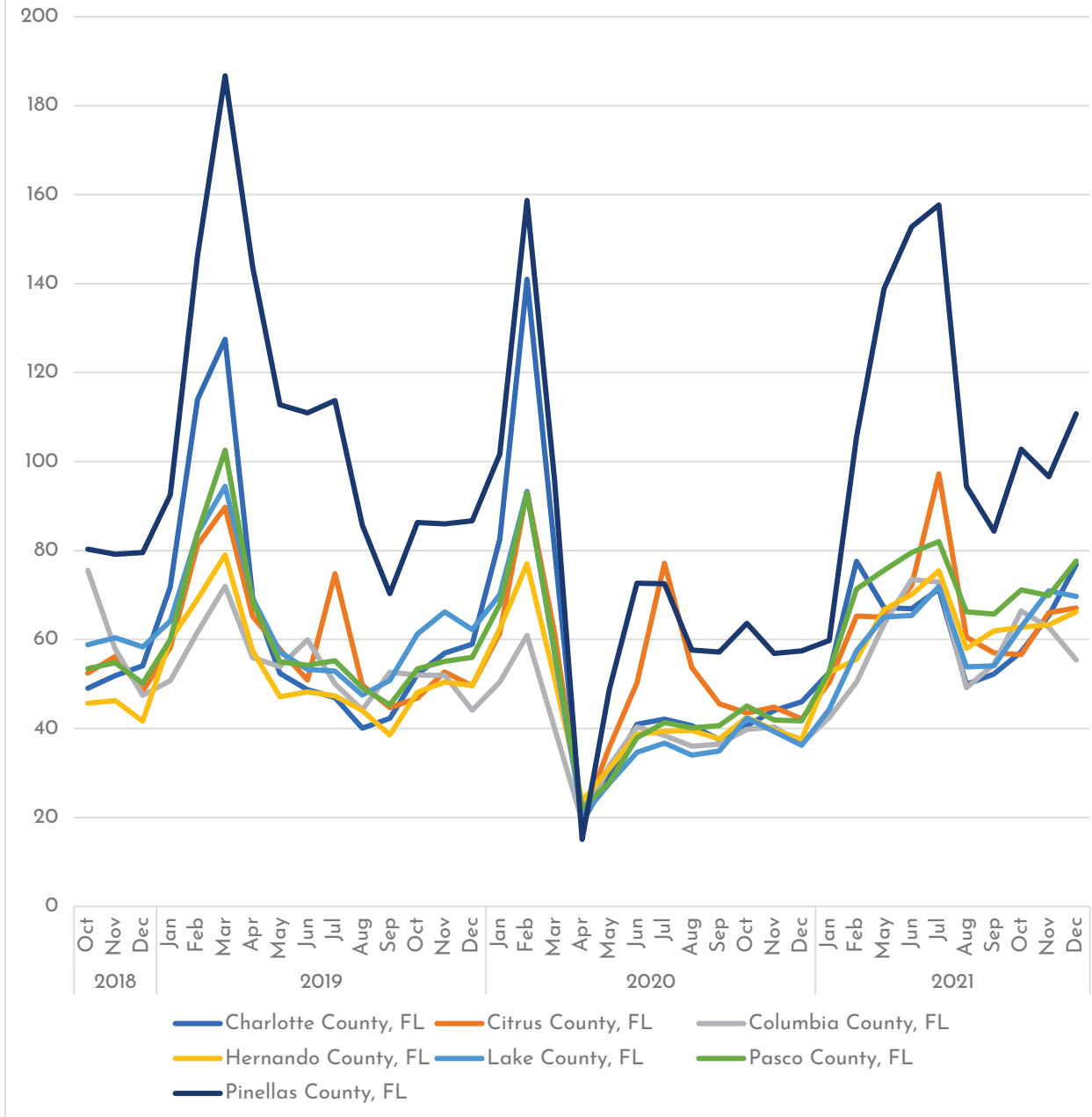
— Charlotte County, FL   
 — Citrus County, FL   
 — Columbia County, FL   
 — Hernando County, FL  
— Lake County, FL   
 — Pasco County, FL   
 — Pinellas County, FL

However, this pattern of hotel occupancy percentage emerges across all nearby and competitor counties in the region. As seen in the chart on the previous page, occupancy rates at county hotels followed a near-identical pattern, especially during and after the height of the health and safety protocols of the pandemic. This indicates that the issues with hotel occupancy were not exclusive to Hernando County. In fact, in 2021, Hernando County recovered better in terms of hotel occupancy than some of the nearby counties. Hernando County hotels generally had a better occupancy percentage than Citrus County and a similar occupancy percentage to Lake County. However, the occupancy percentage was lower than in Pasco County.



The average daily rate of hotels in Hernando County, by the end of 2021, returned back to pre-pandemic levels. In addition, the ADR for Hernando County is lower than in several nearby counties, such as Pinellas and Citrus counties. After the first few months of the pandemic, ADR in Hernando County stayed at similar levels to Pasco, Lake, and Columbia counties. This shows that Hernando County offers better or similar-priced rooms to nearby and competitor counties. This suggests an important distinction for the county since they are able to offer similar accommodations as competitor counties at a more affordable price.

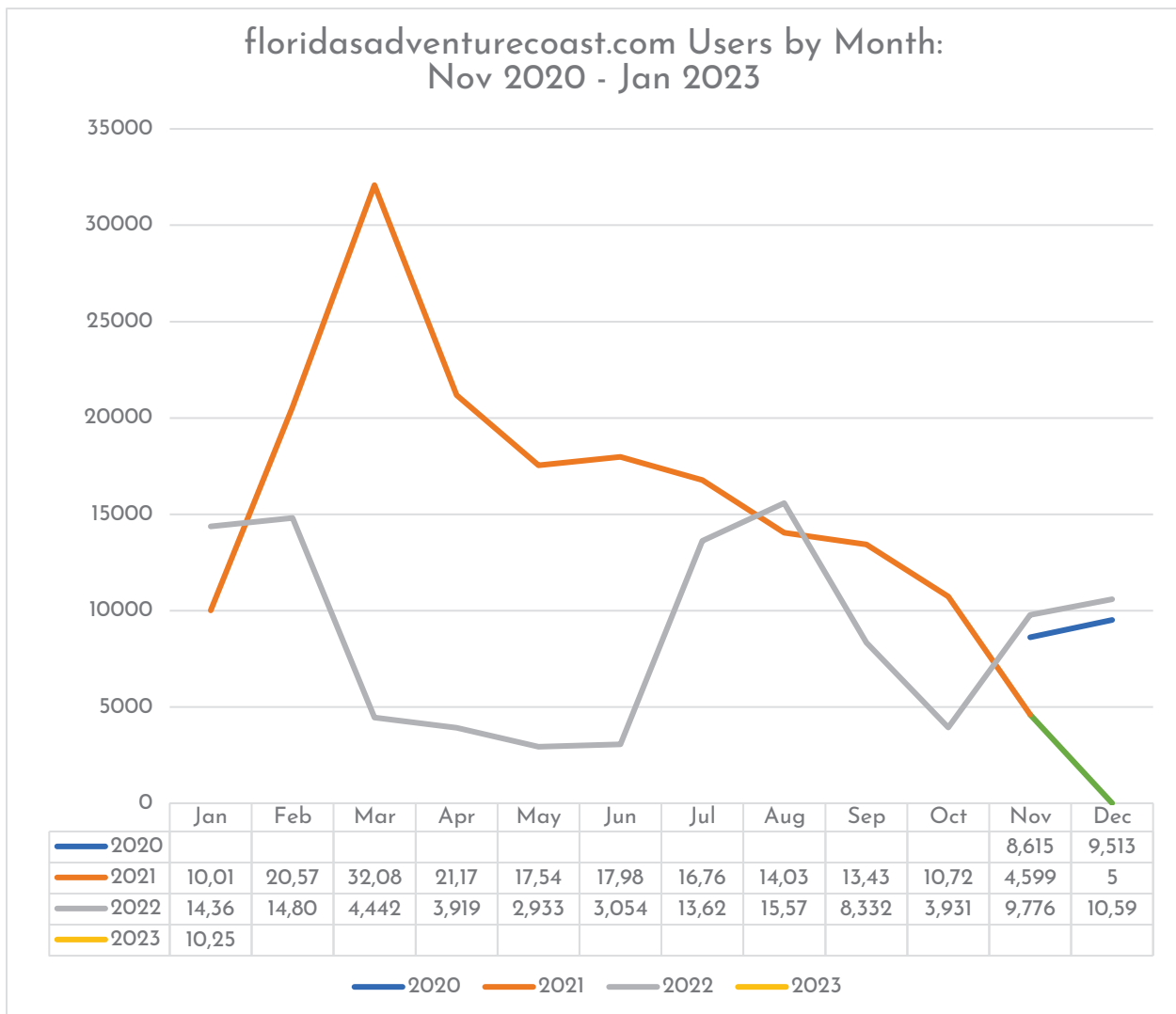
## Revenue Per Available Room Comparison Oct 2018 - Dec 2021



Like ADR, Hernando County’s revenue per available room at the county hotels shows a similar trend as Citrus, Columbia, Lake, and Pasco counties. While Citrus County had a quicker recovery following April 2020, Citrus County’s RevPAR followed a similar trend to Hernando County. In addition, by the end of 2021, Hernando County’s RevPAR was nearly identical to Citrus and Lake counties.

## Google Analytics - Florida's Adventure Coast

The next section details the traffic to the Hernando County tourism website, [floridasadventurecoast.com](http://floridasadventurecoast.com), between November 1, 2020, and January 31, 2023.



As illustrated in the graph above, there were some issues with data collection between mid-November 2021 and mid-January 2022. This issue with the Google Analytics collection may have some impact on the overall trend. The launch of the new site may be the reason for these lower numbers in data collection.

In general, users of the website have decreased over time. Traffic peaked in March 2021 and was lowest (disregarding December 2021) in May 2022. Interestingly, we see somewhat of an inverse in patterns between 2021 and 2022. In 2021, traffic was at its highest levels in Spring and decreased notably by October 2021. In 2022, traffic dramatically decreased in March but saw a rebound in July 2022. This rebound in traffic lasted between July and September and ticked up again in November.

User traffic in 2022 illustrates the seasonality of traffic to the website. People are using the website more in the late fall and winter months, followed by a drop in traffic until the middle of summer.

<b>Users by State: Nov 2020 - Jan 2023</b>		
<b>Region</b>	<b>Users</b>	<b>Percentage</b>
<b>Florida</b>	117,293	38%
<b>Georgia</b>	21,936	7%
<b>New York</b>	16,397	5%
<b>North Carolina</b>	12,440	4%
<b>Ohio</b>	11,696	4%
<b>Tennessee</b>	7,871	3%
<b>Texas</b>	7,064	2%
<b>California</b>	6,787	2%
<b>Michigan</b>	6,601	2%
<b>Virginia</b>	5,781	2%
<b>Other/Not Set</b>	67,865	22%
<b>Outside of U.S.</b>	29,156	9%

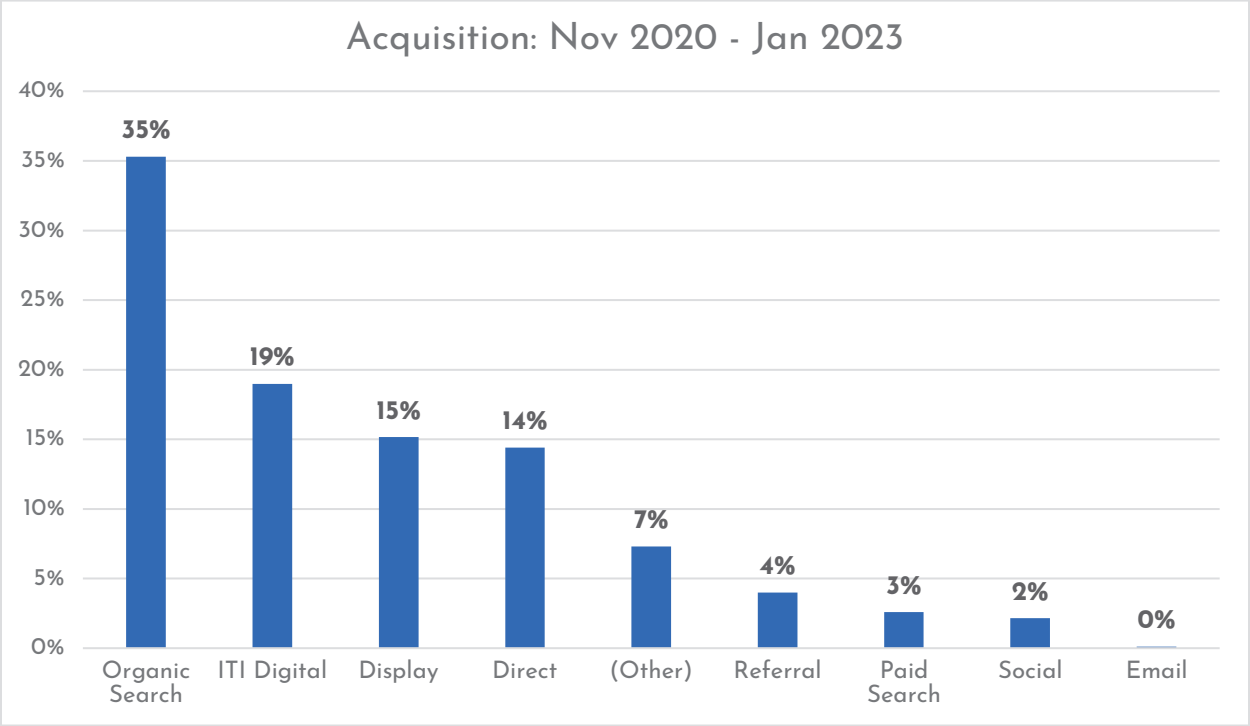
Overall, 91% of traffic comes from those within the United States. Not surprisingly, a plurality of total traffic comes from users in Florida. This does not necessarily mean that those users live in Florida but rather are accessing the website in the state. A noticeable amount of traffic comes from states in the South (Georgia, North Carolina, Tennessee, Texas, and Virginia) and the Midwest (Ohio and Michigan).

<b>Top 10 Cities in Florida: Users:</b>	
<b>Nov 2020 - Jan 2023</b>	
<b>City</b>	<b>Count</b>
<b>Spring Hill</b>	19,526
<b>Orlando</b>	14,285
<b>Tampa</b>	11,165
<b>Miami</b>	7,415
<b>Jacksonville</b>	2,912
<b>St. Petersburg</b>	1,756
<b>Ocala</b>	1,221
<b>Brooksville</b>	1,173
<b>Bayonet Point</b>	1,048
<b>Cape Coral</b>	987

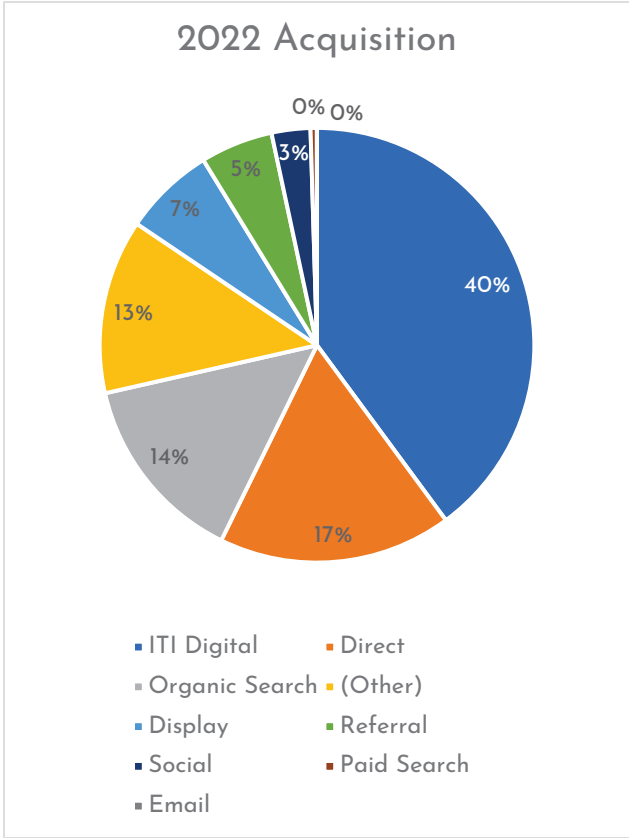
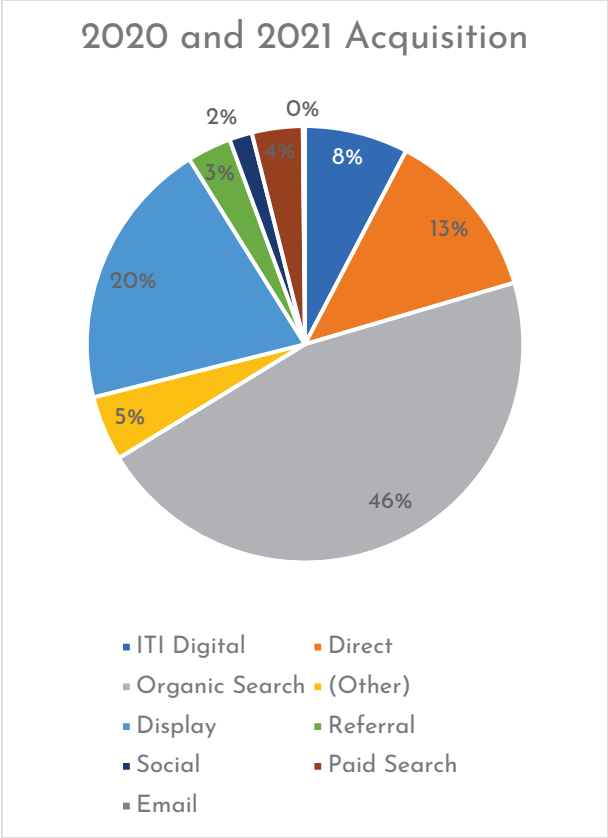
When looking at the cities in Florida where most of the traffic comes from, we see that much of it comes from the Tampa Bay region or in Hernando County. This may indicate two different findings. First, people who are traveling to the area are accessing the site when they are already in the county. Second, those who live close to the county visit the site most often due to the short distance to research events and attractions in the county.

Website Users by Region: Nov 2020 - Jan 2023	
Region	Percentage
Tampa Bay	26%
Central Florida	23%
Hernando County	18%
South Florida	17%
North Florida	7%
Unspecified	4%
Nature Coast	2%

Looking at a broader picture of website traffic from different regions in Florida, we see that nearly a majority of traffic comes from users in the Tampa Bay region (26%) and Central Florida (23%). In addition, another 19% of traffic comes from areas within Hernando County. This, again, lends further evidence that most people viewing the website are located close to or in the county.



When we look at where the traffic comes from, a plurality derives from organic searches. About a fifth (19%) of the traffic comes from ITI Digital.



We see that traffic from ITI Digital has made up an increasingly larger percentage of traffic to the website. In late 2020 and 2021, nearly half (46%) of traffic came from organic searches. However, this changes drastically in 2022, with 40% of traffic coming from ITI Digital.

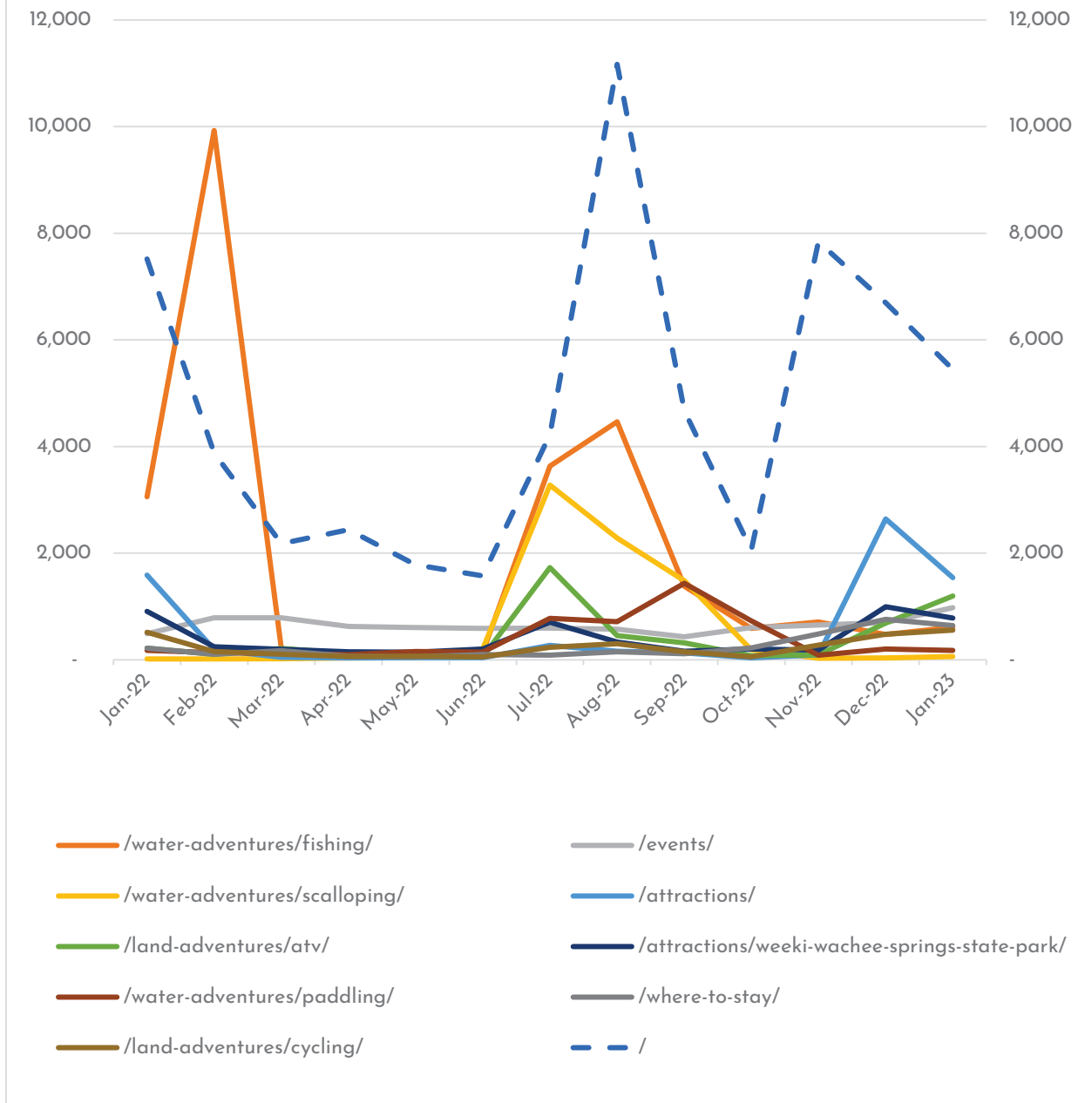
<b>Top 15 Webpages by Pageviews:</b>	
<b>Jan 2022 - Jan 2023</b>	
Page	Percentage
/	35%
/water-adventures/fishing/	15%
/events/	5%
/water-adventures/scalloping/	4%
/attractions/	4%
/land-adventures/atv/	3%
/attractions/weeki-wachee-springs-state-park/	3%
/water-adventures/paddling/	3%
/where-to-stay/	2%
/land-adventures/cycling/	2%
/water-adventures/	1%
/dine/	1%
/explore/	1%
/suggested-itineraries/	1%



<b>/mermaid-trail/</b>	1%
<b>/water-adventures/diving-swimming/</b>	1%
<b>/blog/</b>	1%
<b>/land-adventures/</b>	0%
<b>/camp-a-wyle-lake-resort/</b>	0%
<b>/attractions/floridas-hidden-golf-gem/</b>	0%
<b>/trip-planner/</b>	0%
<b>/brochures/</b>	0%
<b>/contact-us/</b>	0%
<b>/attractions/historic-sites-museums/</b>	0%
<b>/water-adventures/manatee-viewing/</b>	0%
<b>All other pages</b>	16%

Finally, we see that the top 15 webpages make up 84% of the total pageviews to the website. Unsurprisingly, the home page received the most page views, making up 35% of the total pageviews for the website. In addition, 6 of the top 15 pages viewed are focused on water adventures. This helps to illustrate the popularity and draw of water-based attractions in Hernando County for consumers and visitors.

### Top 10 Web Pages by Month: Jan 2022 - Jan 2023



When looking at how the pageviews for the top 10 pages have changed over the last 13 months, we see two key findings. First, most pages are relatively consistent in the number of pageviews received each month. These pages are typically between the fourth and tenth most viewed pages in total during this time. Second, we see some seasonality for the two top pages (not including the homepage). For the fishing page, there are large spikes in views in February 2022 and another spike in traffic in July and August 2022. For the scalloping page, there is a notable spike in traffic between July and September 2022. This shows that some pages received increased viewership during certain seasons compared to other activities that received a similar amount of interest throughout the year.

## Competitive Analysis

Competitor counties to Hernando County were also examined for various amenities and attractions offered in their respective counties. Overall, there were 9 different counties in the state of Florida identified as competitors based on location, amenities, and size. These counties are: Citrus County, Charlotte County, Columbia County, Lake County, Putnam County, Sumter County, St. Johns County, Hardee County, and Okeechobee County.

As seen on the chart on page 20, Citrus County's tourism page highlights all the same types of amenities and attractions as Hernando County. This is not surprising since they border each other and some attractions, such as the Withlacoochee State Park, run through both counties. A county that offers several of the same attractions and amenities but is in a different area of the state is Charlotte County. Charlotte County is a small, rural county south of Tampa Bay, bordering the southern side of Sarasota County. Charlotte County highlights its outdoor adventures, fishing, and golf, similar to Hernando County.

Another competitive county in a different part of the state is St. Johns County, located on the Northeast coast of Florida. This county borders Duval County and is home to St. Augustine and Ponte Vedra. While not offering some of the water-based attractions known in Hernando County, like manatee viewing, scalloping, and natural springs, the county is home to a verbose array of historical and cultural institutions and landmarks and is home to several golf courses and many natural preserves and waterways for natural activities, fishing, and animal watching.

To get a better sense of how competitive Hernando County is in some of these areas compared to other counties, we examined information about fishing, birdwatching, and golf in all counties that promoted these amenities.

For fishing, many of the counties offer a similar variety of fish to catch. All coastal counties offer similar fish that are common to be caught off their shores. This included tarpon, seatrout, and bluegill. Landlocked counties also mentioned several different types of fish that are also found in Hernando County. Most notably, bass fishing was a big draw for these counties and was emphasized heavily compared to Hernando County. For example, Lake County stated it was the "bass capital," while Okeechobee County noted it had the "best bass fishing in Florida." While Hernando County offers bass fishing, it did not place as great of an emphasis on this type of fishing on its tourism website compared to these other counties.

To also get a sense of access to waterways, we examined the number of boat ramp locations in the county. All counties had more than 10 boat ramps, except for Okeechobee County, with only 6. Hernando County appeared to have the second-fewest boat ramps compared to counties that boasted about fishing. Citrus County had 20 boat ramp locations, while Charlotte County had 16. St. Johns and Lake counties had a similar number (12) of boat ramp locations compared to Hernando County. These findings indicate that Hernando County is competitive in the types of fishing that can be done in the county's waters, but it was less clear which fish are the greatest draw to the area. In addition, while Hernando County had similar public access to waterways as other competitors, it was clearly behind both Citrus and Charlotte counties.

Next, the types of birds that make a home in the county were examined based on the Cornell University Lab of Ornithology's website, eBird. This website provides the number of species observed, the number of hotspots, top locations for birdwatching, and other information. For this document, the number of species, number of users, number of hotspots, and top location are provided.

eBird Data				
County	Species Observed	eBirder Users	Hotspots	Top Hotspot
Hernando	321	1,975	51	Weeki Wachee Preserve
Citrus	313	2,400	64	Fort Island Gulf Beach
Charlotte	329	3,933	78	Ollie's Pond Park
Lake	314	4,115	290	Lake Apopka North Shore
Sumter	260	1,845	56	Lake Panasoffkee
St. Johns	343	4,904	128	Guana River WMA

These findings show that users of the website indicate that Hernando County is home to a larger variety of bird species compared to most competitor counties but has the fewest hotspots. This indicates that Hernando County is a good place for birdwatching enthusiasts to come, but the variety of places to go is fewer than in other counties. Yet, this could also be seen as a positive since visitors may have to go to fewer areas to see more varieties.

For golf, Golf Digest's top courses in Florida article was used to determine the quality of golf courses in competitive counties. Hernando County boasts 16 golf courses, which is only beaten by three competitive counties in terms of quantity. However, Hernando County is only one of three counties to have a course ranked among the top courses in Florida. The only county to have more than one course is Hardee County, which has 3 of the top 10 courses in the state. However, it should be noted that Hardee County's DMO website does not reference this set of courses anywhere visible.

County	Number of courses	Top Course in Florida
Hernando	16	1
Citrus	15	0
Charlotte	13	0
Columbia	2	0
Lake	27	0
Putnam	2	0
Sumter	22	0
St. Johns	19	1
Hardee	4	3

Golf offers a competitive edge for Hernando County since it hosts an expansive number of golf courses and will offer a premier golf course at Cabot Citrus Farms in the county. These numbers offer insight that Hernando County is in a prime position to be a destination area for golf enthusiasts from across the state and for visitors from various backgrounds.

### Amenities and Attractions Offered in Hernando and Competitor Counties

	Outdoor Recreation	Fishing	Scalloping	Manatees	Arts and Culture	History	Agritourism	Natural Springs	Golf	Beer and Wine	Birdwatching and Wildlife Viewing	Music Festivals	Walk, run, and bike events
<b>Hernando</b>	X	X	X	X	X	X	X	X	X	X	X	X	X
<b>Citrus</b>	X	X	X	X	X	X	X	X	X	X	X	X	X
<b>Charlotte</b>	X	X		X	X				X	X	X	X	X
<b>Columbia</b>	X					X		X	X	X		X	
<b>Lake</b>	X	X			X	X	X		X	X	X		
<b>Putnam</b>	X				X	X	X		X	X			
<b>Sumter</b>	X	X				X	X		X		X		
<b>St. Johns</b>	X	X			X	X			X	X	X		X
<b>Hardee</b>	X					X	X		X			X	
<b>Okeechobee</b>	X	X		X		X	X					X	

## Literature Review

To round out the secondary research process, academic and news articles were reviewed on various topics related to tourism in Hernando County. This part of the process is to assess similarities and differences other tourism destinations like Hernando County have dealt with in the past. For this study, only cases in the United States were assessed. While literature exists about the challenges of tourism growth and rural tourism in various parts of the world, their situations, challenges, and solutions do not necessarily map to the conditions Hernando County faces.

### Rural Tourism

Hernando County would be considered a rural tourist destination based on the definition created by Nogueira and Pinho (2015). They defined rural tourism as “an experience to reconnect with a past, to appreciate nature, local traditions, celebrations and art forms, a connection with what is perceived as a simpler life or a way to return to childhood.” (Nogueira & Pinho, 2015, p. 325) This conceptualization not only matches the focus on nature but also, as seen later in this document, is in line with many of the descriptions we received during in-person dispatch interviews about Hernando County representing the “old Florida” ideal.

Rosalina, Dupre, and Wang (2021) discuss the challenges that rural tourist destinations face. These challenges were grouped into 2 categories, internal and external. Internal challenges focus on the limited number of local organizations and resources. This includes social and political barriers to tourism development, a limited workforce, limited physical amenities, and insufficient financial support. External challenges focus on factors outside or apart from rural resources. This includes tourism demand, competition, and potential conflict with external resources.

The challenges faced by a particular destination vary. However, Rosalina, Dupre, and Wang (2021) offer some general solutions to overcome these challenges. These solutions include increased planning and management and increased use of advanced technologies.

Jin, Wu, Zhang, and He (2021) looked at the role that government can play in the development of rural tourism, specifically agricultural tourism. They focused on the development of agricultural tourism in Michigan. They used a 6-stage model, known as the TALC model, to examine the life cycle of a tourism destination. One main takeaway from their findings is the role government can play in supporting agrotourism in rural destinations. This focus should start with research and then move toward the development of other organizations and policies that promote agrotourism and supports businesses. These efforts should be done in a way that leads to collaboration between government, businesses, and other stakeholders that contribute to “the steady growth of revenue from agrotourism.” (p. 10). While Hernando County does not solely offer agrotourism, these concepts can be applied to other aspects of rural tourism in the county. Work done in this strategic planning process should be seen as part of the research phase in order for the area to have a better understanding of what can be done to increase recognition and interest in tourism in the county.

Lane, Kastenholz, and Carneiro (2022) looked at how rural tourism can survive and grow. Overall, there are four ways that rural tourist destinations can move forward. First, they must be able to satisfy changes in needs. Second, it must retain the unique selling point of the destination. Third, it must change (in some ways) to ensure visitors are happy with their visit. Finally, it must be managed professionally. They also state that many aspects of rural tourism, like hiking and kayaking for Hernando County, do not need designing. However, work can be done to improve accessibility to these outdoor amenities that make them more attractive and marketable to a wider group.

Rural tourism is a segment of tourism that focuses on experiences reconnecting visitors to nature and other aspects of a perceived simpler life. Rural tourist destinations will face varying internal and external challenges that must be overcome to help the area survive and grow. One way to

help is the use of planning and research that initially involves governmental organizations that later work with businesses and stakeholders to allow rural tourism to grow. In general, rural tourist destinations face the need to maintain their unique charm while also developing and changing to meet the needs of a shifting market.

### Resistance to Rural Development

Tourism is an important aspect of many areas in the United States that can help areas provide important services, upgrades to public infrastructure, and support for local businesses that would not be possible without revenue sources from those not living in an area. However, not all community members and stakeholders have a positive view of tourism, especially in rural areas. Policies can be used by communities to dissuade certain types of development.

Other community members are more concerned about the strains that overtourism can have on an area. Laurie Schreiber (2022) looked at how businesses in Maine attempted to address these issues without hindering tourism. The main solutions focused on encouraging off-peak visits and visitations to less-visited locations.

There are ways to work with the community to overcome anti-development sentiments. Tiffany Manuel (2018) recommends that the community is engaged early and often throughout development. She also mentions the need to recruit and mobilize leaders in the community who can help sell the idea to their neighbors and highlight the benefits to the community. Additionally, it is important to address legitimate concerns and have someone that is part of the development visible and available to talk with the community.

As Hernando County continues to grow its tourism industry, it will be continued to be met with some resistance from community members. Pasco County, for example, has seen tremendous growth within the last decade. This development has been seen in both positive and negative light by community members. Hernando County is in a position to learn from the successes and shortcomings faced by nearby counties that have developed over the last several years and adapt those situations to the needs of the county and its community members. It is important that the benefits of tourism and development are made clear to community members, and they perceive that those overseeing the development will listen to legitimate concerns when they arise. Additionally, attempting to increase tourism to non-popular destinations in the county and increase non-summer travel may also help alleviate some resistance to tourism in the county.

### Heritage and Historical Tourism

Hernando County boasts a rich history that extends back to the U.S. Civil War. Various attractions around the county have been viewed as a way to draw in more tourism centered on the history of the area compared to some of the natural attractions of the county. However, historical tourism presents its own opportunities and challenges.

Heritage tourism is a popular type of tourism in the United States. One-third of Americans show some level of interest in heritage tourism (Elliott, 2022). However, while Hernando County's history can be traced back to the Civil War, there are few marketable places in the county that would be conducive to this type of tourism. One site in the county, the May-Stringer House, could be seen as a prominent site. The May-Stringer House could also pique the interest of visitors due to reports of paranormal activity, which is a notable niche market. However, paranormal tourism may make maintaining the history of the house difficult. (Yuko, 2021) Another opportunity for heritage tourism may be to focus more on the Civil War history of the area. However, a challenge to this is the number of areas in the county. Looking at the tourism website mostly reveals some historical plaques across the county that recount the history. Beyond that, there is little that is marketed for history. Programs at the local historical society or tours highlighting the Civil War history could help. Another possibility is to expand Tour BVL to the historical markers in the county to make learning about the history of locations and events more accessible. One positive note about historical tourism in Hernando County is the

partnership that Chinsegut Hill has with the Tampa Bay History Museum. This partnership allows members of the Tampa Bay History Center to visit Chinsegut Hill for free. This partnership has led more people from the Tampa Bay area to visit Hernando County. This program shows how partnerships can bring more tourists to the county.

In conclusion, heritage and historical tourism may present some new opportunities for tourism in the county. Yet, more marketing and programs will need to be created to help any heritage tourism endeavors in the county.

## Stakeholder Interviews Findings

The first part of the research process was conducting one-on-one interviews with key stakeholders in Hernando County. Stakeholders were identified by the tourism department with their contact information provided. Members of the HCP Associates research team contacted stakeholders by phone to schedule interviews. Stakeholders that agreed to an interview were sent a reminder the day before the scheduled interview time. Interviews were scheduled for a 45-minute block of time, with interviews ranging from 30 minutes to 45 minutes in length. Stakeholders were not provided the list of questions prior to the scheduled interview except for one stakeholder who made a request. Additionally, all interviews were conducted via phone call or video call.

Prior to the start of the project, a target of 25 stakeholders was set to reach and interview. However, only 13 stakeholders completed an interview for various reasons. Some stakeholders did not return calls made or respond to messages left. Stakeholders were contacted again if they did not answer the first message. Yet, some did not respond to any call or message. Other stakeholders were not interested in providing an interview. Other stakeholders indicated they did not have time due to a lack of staff or other issues. Many stakeholders were not amenable. Many of those who did not participate in this part of the research process were hoteliers in the county. This set of stakeholders was initially contacted in the summer. However, due to this being the travel season, it was agreed upon they would not be contacted again until the winter. When this group was contacted again, most did not pick up. Only two initially agreed to an interview but did not respond to follow-up messages.

Most respondents did not grow up in Hernando County. Stakeholders that moved to Hernando County mostly came either for a job or to start a business. Additionally, this group of stakeholders all reports a good relationship with the county tourism office.

Respondents were then asked if they felt there has been a noticeable change in the composition of those visiting Hernando County since the rebrand. Stakeholders were split primarily into two groups. The first group believed that it created greater appeal for more Floridians, especially those in central Florida. The other group stated that the name was not a big driver. Some of this group went further and stated that COVID drove more outdoor adventure tourism. Only one respondent stated that the branding did help change the composition of tourism in Hernando County. This shows that stakeholders were mixed on the effects of the brand, but it is clear they did not feel it drew people from outside of the state to visit the county.

When stakeholders were asked if the rebrand made Hernando County more recognizable to average visitors, they were split as well. Some stakeholders believed it helped distinguish the county, especially from nearby counties or brands, like Pasco County or other parts of the Nature Coast. However, the other group did not think it created any impact on the recognizability as a destination.

Next, respondents were asked if the perception created by "Florida's Adventure Coast" was correct for out-of-market tourists. A plurality of stakeholders believed the branding should continue with another small group stating the need to emphasize attractions around water activities, golf, and biking. A smaller group believed the brand was a misnomer and did not



adequately encapsulate the activities and feel of the county. This group felt the county, and the attractions were more relaxed compared to what they would consider adventurous.

Stakeholders provided several different activities and attractions they wanted out-of-market travelers to think about the area. Some wanted visitors to think about the water and other outdoor activities, though another stated they wanted more thought about eco-tourism alone. Another set of stakeholders focused on the mermaids or the new mermaid trail. A third set focused their attention on the historical aspects of the county, including Brooksville. One stakeholder mentioned they wanted increased thought about golf and other sports tourism.

Though stakeholders provided several different things they want stakeholders to think about the destination, they were relatively united that the natural aspects distinguish Hernando County from a tourism perspective. This includes the Weeki Wachee River and Preserve and the outdoor adventures and attractions. A noticeable but smaller section of the stakeholders focused on the historical aspects of the county. This mostly focused on the Weeki Wachee Mermaids and Brooksville. This is a clear indication that stakeholders feel that the natural aspects and outdoor activities are the most distinguishable aspect of tourism in the county.

Stakeholders were almost unanimous in stating that Citrus County was the main competitor to Hernando County's tourism. A few stakeholders also mentioned Pasco County and the Tampa Bay region, but only one explicitly mentioned an area outside of Florida. This shows a clear belief amongst stakeholders that Hernando County's tourism is only threatened by other areas in Florida, particularly those close to the county.

Next, stakeholders were asked about potential objections a potential tourist may have about visiting Hernando County. They provided various potential objections a tourist may have. Issues with attractions in the county were the most cited objection. This includes the lack of attractions, the quality of attractions, the capacity of attractions, or the awareness of attractions. Respondents also cited a lack of quality lodging in the county as a deterrent to tourism. Multiple respondents also discussed the lack of water and beach access in the county. Some other issues included brand confusion, infrastructure, lack of food options, and a limited workforce. This array of objections indicates that there are many areas in which the county can improve to make tourism more attractive.

When respondents were asked how Hernando County can address these objections over the next half-decade, there were several ideas discussed. One stakeholder mentioned developing the small section of the Weeki Wachee Preserve, in turn, improving the pet-friendliness of the area. Another wanted more activation in Brooksville, while another wanted more emphasis on Brooksville and the mermaids. A different stakeholder believed rebranding may improve these objections, while another wanted to deepen marketing partnerships. This eclectic mix of solutions suggests that stakeholders do not have an agreed-upon idea of how to overcome these obligations despite perceiving a similar set of objections.

The stakeholders then answered how the region and market over the next several years. All stakeholders believed that population growth and development would continue to change the market and region over the next several years. This shows a clear belief that more people moving into the region and the subsequent development will affect Hernando County in various ways. This could be from more potential visitors to the county to more people looking to move to the county. A few stakeholders also mentioned concerns about managing this growth to maintain the rural charm and appeal of the county. Other stakeholders mentioned current or new attractions being a bigger draw to the county and the need to add and develop new attractions for Hernando County to garner more interest. Stakeholders show that the growth of the population in the area will lead to new and improved development, but it must be done in a responsible way so the historic charm of the county is not lost.

Stakeholders were also asked which other attractions should be spotlighted more to provide potential relief to the traffic on the Weeki Wachee River during peak season. Many stakeholders cited the need to spotlight other preserves and parks in the county. Some of these people also suggested developing a small portion of the Weeki Wachee Preserve to increase capacity. Outside of highlighting other waterways in the county, some stakeholders stated they wanted Downtown Brooksville and Lead Foot City to be spotlighted more. Others were more general in stating the need for more man-made attractions or developing other parts of the county. These responses suggest that stakeholders feel that both other waterways should be highlighted in addition to man-made attractions. This would provide relief to the Weeki Wachee River while also diversifying the number of attractions available in the county.

Respondents were asked what potential current or future investment opportunities would make the region more attractive for tourists. Stakeholders provided a myriad of responses. The most often provided response was improved roads and general infrastructure. Others also suggested more access to water or increasing publicly accessible water. This included respondents mentioning the creation of artificial lakes, to development of the coastline, and increasing public access to beach areas. One stakeholder suggested the need for convention and hotel space in the county. These responses generally fall under improvements that would not only help make tourism more attractive in the county but also benefits its residents.

Stakeholders mostly noted that improved and new hotels would be necessary to improve business-related travel to Hernando County. Stakeholders also mentioned the need for increased meeting spaces. This included one respondent explicitly mentioning the need for a convention center, though another noted it may be too early for a space of that size. Stakeholders show a need for improved and new accommodations to both housing business travelers and their business-related activities to promote more business travel to the county.

When stakeholders were asked about what steps needed to be taken to ensure that tourism does not begin to adversely affect residents, most responses centered around communication. The first aspect of communication is educational. Stakeholders mentioned the need for education about the benefits of tourism to the county. This group of stakeholders does not believe the average citizen understands the revenue generated from a tourist is invested back into the community. The second aspect of communication focused on agenda setting. Stakeholders noted that there needs to be a change in the mindset of both residents and some elected officials. As of right now, there is a small but loud contingent of residents who oppose more development. This will require better communication with the community to ensure plans are followed, and they understand the benefits residents will receive. Communication is an integral component to ensure that the county receives more vocal community support and that community members understand how they benefit from these developments.

Some stakeholders responded similarly when asked about how to protect the area's natural environment. Many stakeholders mentioned the need for education for all destination visitors about how to protect the environment around them. However, other responses centered around proper development and enforcement of laws to make sure that natural areas are not infringed upon either by businesses or residents looking to take advantage of their access to natural areas in the county.

Again, we see communication and the desire for smart and proper development being key for stakeholders when finding a balance between growing tourism and preserving the local lifestyle for residents. Stakeholders are aware that more development is needed, but it needs to be done in a way to maintain the rural capabilities of certain areas in the county.

Stakeholders also viewed that Florida's Adventure Coast can contribute to this success through improved and increased communication and promotion. One stakeholder mentioned the need for the tourism office to have a "bigger seat at the table," but responses generally show that

Florida's Adventure Coast's role will be to communicate with visitors about events, attractions, and amenities currently offered in the county and offered in the future.

Finally, very few respondents answered about the biggest challenges related to tourism that Florida's Adventure Coast could help with. Those that answered centered around working to increase some capacity, particularly with boat parking and park access. Another mentioned the need to recruit new restaurants and retail shops.

### Concluding Thoughts

Overall, stakeholders did not feel that the new branding created noticeable changes in the composition of travelers to the county and were split on whether it helped to make the area more recognizable to guests. However, most stakeholders felt the need to stay the course with the current branding, with some stating greater emphasis on certain attractions would help. Though stakeholders were mixed in their perceptions, they generally did not want to see another change in the brand but more of a different emphasis.

The natural aspects of the county and the historic parts of the county continue to be centered in discussions about what distinguishes the county and what stakeholders want guests to think about when visiting. This, in turn, leads to the biggest competitor being Citrus County, in their eyes. This is not surprising given the proximity and attractions offered in Citrus County are nearly identical to Hernando County. However, stakeholders are clear that the lack of attractions and quality hotels may create some issues with tourists wanting to stay in Hernando and deciding to visit a different part of the region. These will be important to address in order to remain competitive with Citrus County and meet the demands of a growing tourism market.

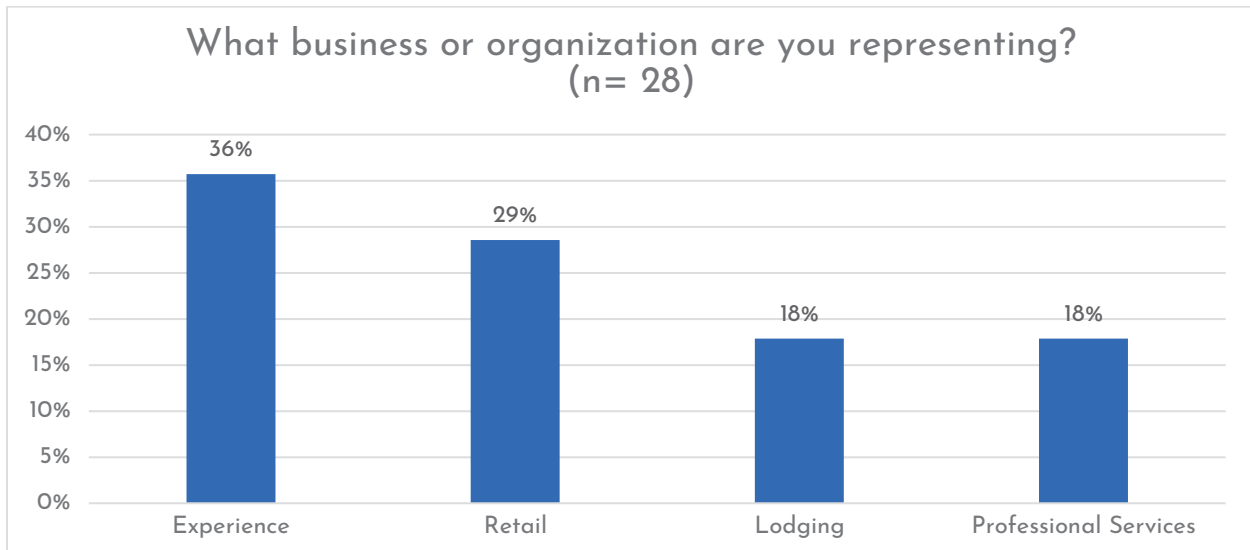
"Population growth and development" was cited as the main way the region and market will change over the coming years. At the same time, there is already congestion on the Weeki Wachee River, one of the most popular destinations in the county. In order to relieve some of the traffic on the river currently and into the future, there need to be more promotional efforts to spotlight the other waterways and natural areas in the county, as well as some man-made attractions, such as Lead Foot City and the City of Brooksville. It will also be necessary to develop some more areas of the county to meet increased demands. In addition to these attractions, improved infrastructure and increased water access are investments that need to be made to make the area more attractive.

Business-related travel could benefit from improved hotel inventory and larger meeting spaces. Yet, all development in the county has been met with vocal opposition, so it will be important to communicate with residents before and during development projects as well as be smart about growth to quell some of this loud dissent. Stakeholders also feel that increased communication about the benefits of tourism and its effects on the county will also help. Communication is a critical component identified by stakeholders to promote and grow tourism in the county while also maintaining the rural charm of the area for residents.

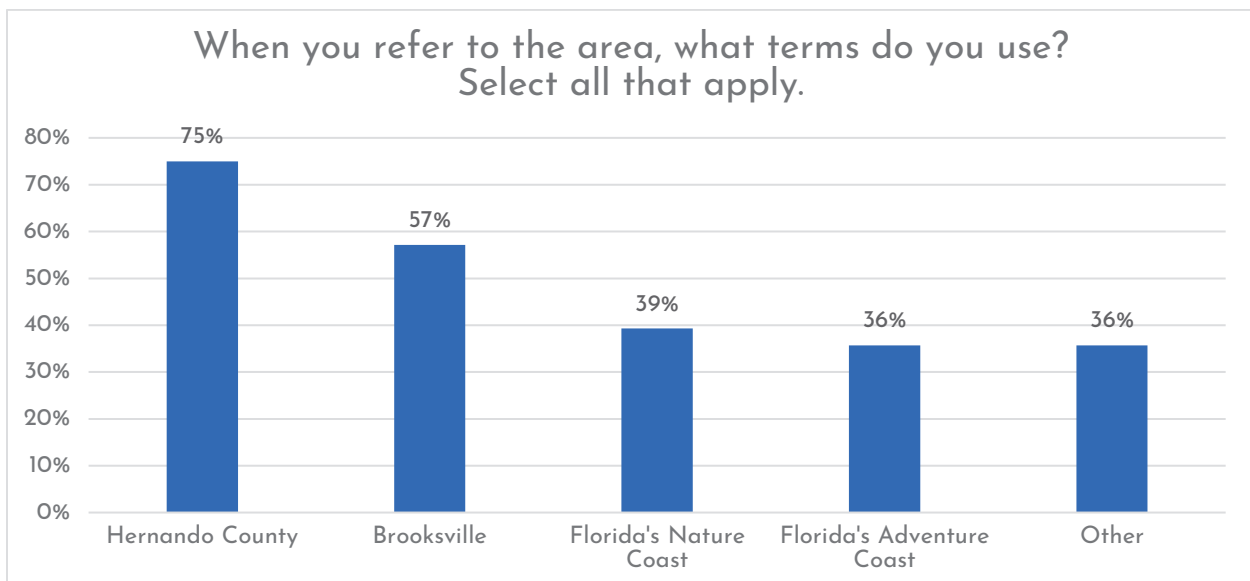
## Secondary Stakeholder Survey Findings

In addition to one-on-one stakeholder interviews, an online secondary stakeholder survey was sent out to additional stakeholders and stakeholders that did not schedule a one-on-one stakeholder interview.

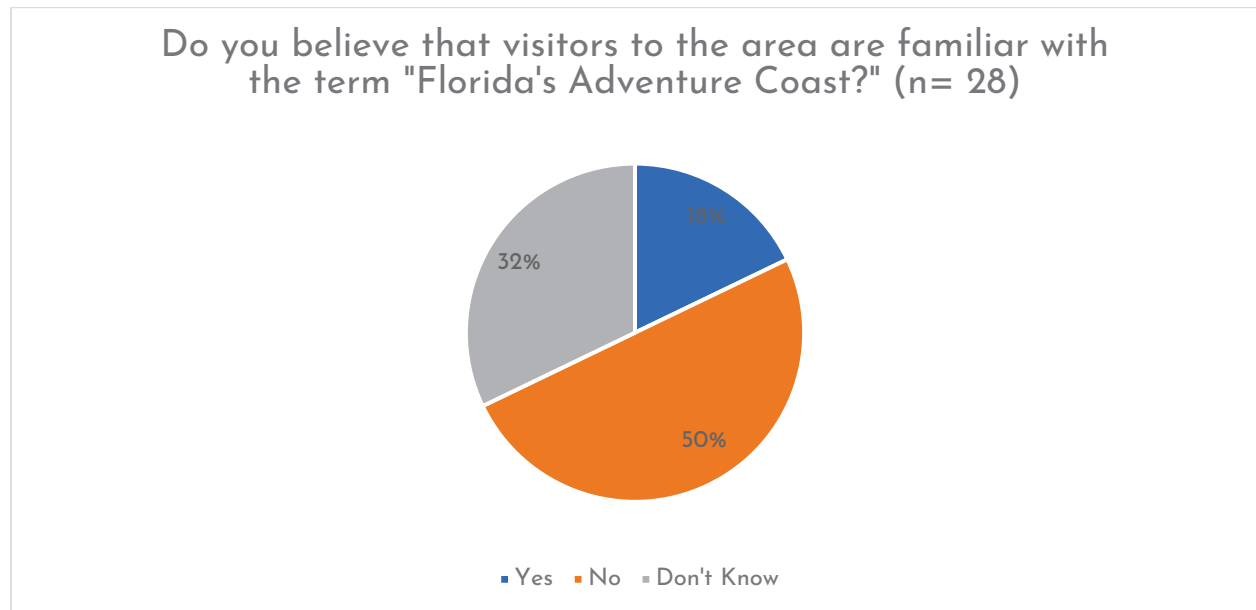
On January 25, 2023, Hernando County's tourism department sent out the survey to key stakeholders on behalf of HCP Associates. Respondents could fill out the survey from January 25, 2023, to February 8, 2023. Stakeholders were able to provide aided and unaided feedback regarding their use and familiarity with Florida's Adventure Coast branding, advantages and challenges to tourism in the county, their level of engagement with the tourism department, and the importance of tourism for the county's future.



Overall, 28 stakeholders filled out the secondary stakeholder survey. Of these stakeholders, four areas of business were represented in the data. The four areas were 1) lodging, 2) retail, 3) experiences, and 4) professional services. Overall, stakeholders who work with experiences represented the largest group, making up 36% of responses. Retail represented 29% of respondents, while lodging and professional each represented 18% of respondents.



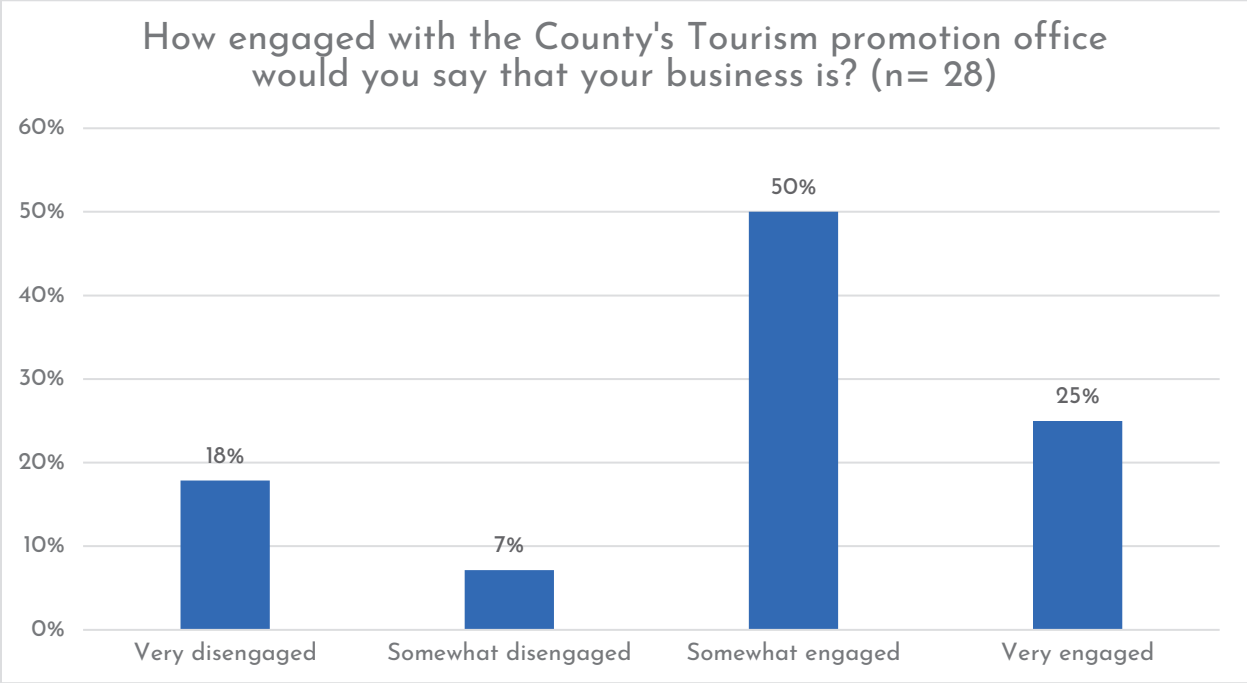
Respondents were then asked which terms they used to refer to the area. They were provided a list of four names and an "other" category where they could fill in a response. Respondents were able to select all choices that they used. Not surprisingly, a supermajority of respondents (75%) reported that they refer to the area as "Hernando County." Moreover, a majority of respondents (57%) refer to the area as "Brooksville." Only 39% of respondents (11 respondents) reported referring to the area as "Florida's Nature Coast," and 36% of respondents (10 respondents) reported referring to the area as "Florida's Adventure Coast. In addition, 36% of respondents reported using other names to refer to the area, with "Weeki Wachee" being used by half of this group.



Respondents were then asked whether they believed that visitors to the area were familiar with the term "Florida's Adventure Coast." Half of all respondents believed visitors were not familiar with Florida's Adventure Coast branding and another third of respondents did not know if visitors were familiar with the brand. These findings indicate that most stakeholders do not use the term "Florida's Adventure Coast" and believe that visitors to the county are not familiar with this branding for the area.

<b>What do you want out-of-market visitors to think of when they consider visiting Hernando County?</b>	
Outdoor Activities	75%
Events and Attractions	43%
Historic/Small-Town	29%
Nature	25%
Friendly and Welcoming	18%
Other	11%

Next, respondents were asked an open-ended question that probed what they wanted out-of-market visitors to think of when they considered visiting Hernando County. Interestingly, all respondents mentioned something about outdoor activities or nature. About 4 in 10 (43%) respondents mentioned they wanted visitors to think about the events, attractions, and amenities that are offered in the county. Furthermore, about a third of respondents (29%) mentioned they wanted visitors to think about the historic aspects of the county.

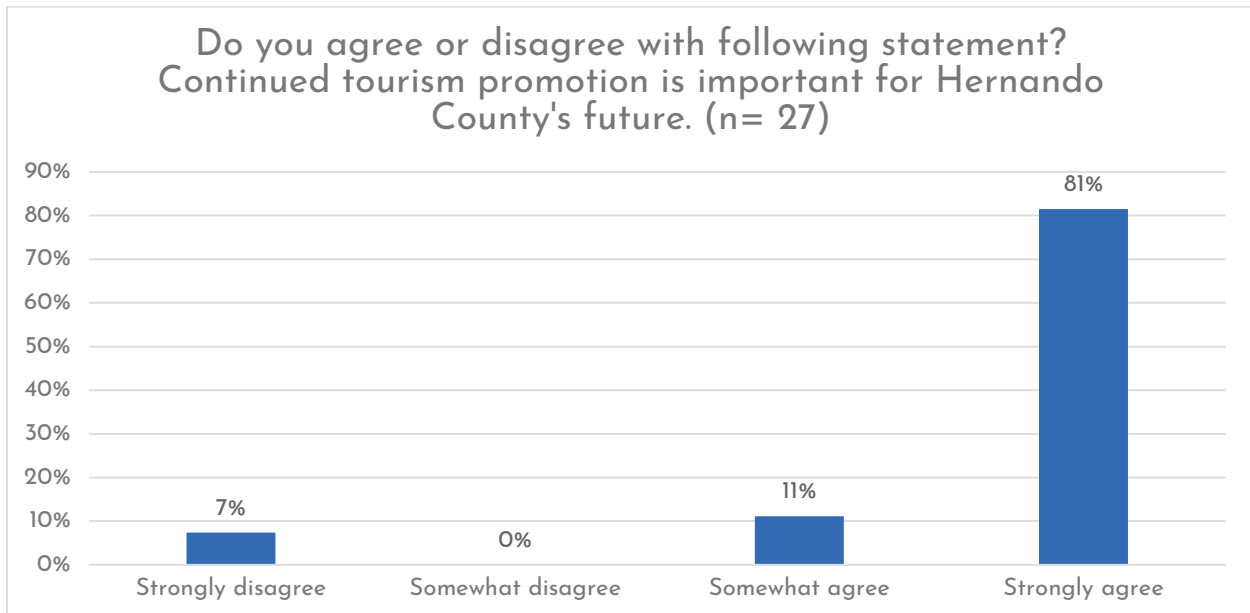


Respondents were also asked how engaged their business is with the County’s Tourism promotion office. A supermajority (75%) of respondents reported that they were engaged to some degree with the tourism promotion office.

<b>What are some challenges impacting tourism that Hernando County needs to address as it plans for the future?</b>	
Retail/Dining/Lodging Options	29%
More/Improved attractions and public spaces	25%
Traffic/Parking	14%
More promotion	14%
Other	14%
Not sure	14%
Growth/Overdevelopment	11%

When respondents were asked the challenges that impacted tourism in Hernando County, several different responses were provided. About a third of respondents mentioned that the retail, dining, and lodging options were not adequate. A quarter of respondents mentioned that attractions and public/recreational spaces in the county need to be improved, expanded, or diversified to grow tourism. A few respondents (14%) directly mention that more and better

promotion of events, activities, and amenities could address challenges to tourism in the county. Unlike question 4, where stakeholders were clear about the strengths of the county and what they wanted visitors to know about, they were divided on the biggest challenges facing the county. This divide indicates that multiple challenges will need to be faced in the coming year to help drive tourism in Hernando County.



We then asked stakeholders how strongly they felt that tourism promotion will be important for Hernando County's future. This finding shows that stakeholders largely agree about the importance of tourism on Hernando County's future. A vast majority of respondents (93%) agreed, to some degree, that tourism promotion is important for the future of Hernando County. Only two respondents (7%) strongly disagreed about the importance of tourism for the county. This shows that stakeholders recognize the impact that tourism will have on the development of Hernando County.

Finally, respondents were asked to provide any additional feedback they wanted to share. 21 of the 28 stakeholders provided additional feedback, which fell into three main themes.

First, respondents mentioned a desire to maintain current attractions in the county while working on bringing in new options. This included a statement about teaching current businesses how to better attract tourism to invest more in the arts and culture industry.

Second, some stakeholders wanted greater emphasis on different aspects of tourism in Hernando County. As shown in question 4, nature and outdoor activities are at the top of mind of stakeholders. However, a few respondents mention other tourist options that do not receive as much attention but are present in the county. For example, one stakeholder expressed a desire in elevating the importance of equestrian tourism, which is mostly dominated by Marion County currently. Another mentions the need to promote the "indoor adventures" visitors can have in the county instead of just outdoor activities.

Third, some stakeholders believe that additions or changes in marketing of the retail and activities in the county should occur. One respondent mentioned having physical flyers that promote the businesses and restaurants in the area to hand out at their business instead of directing them to the county tourism website. Another wanted more broader promotion of the county, and another mentioned the Nature Coast branding as the preferred way to reference the area. The remaining stakeholders who did respond offered positive remarks or gratitude for the work.

## Concluding Thoughts

In conclusion, businesses and stakeholders in the county rarely use the term “Florida’s Adventure Coast” when referencing the area. Most generally use Hernando County or Brooksville as they way to identify the area or the area of their business. Additionally, these respondents are clear that out-of-county visitors are either not familiar with the name or are unsure they are familiar.

Unsurprisingly, all businesses that responded believe that outdoor activities and nature should be at the front of visitor’s minds when they visit the county. There is also a strong belief that the events and amenities offered in the area should be what visitors should think about when visiting.

On a positive note, a majority of the businesses reported being engaged, at some level, with the tourism office. Though this may not be surprising given the way the survey was distributed, it is a good sign that businesses in the county are engaged with the tourism board. This engagement allows for better promotion and support and could have an impact on tourism in the future.

When stakeholders were asked about the challenges to tourism in Hernando County that need to be addressed, no area was mentioned by more than a third of respondents. This may indicate two different pictures. First, since a particular challenge was not mentioned by a majority of respondents, these challenges may be isolated to certain areas or businesses in the county. However, it is more likely that there are several challenges that need to be addressed in order for tourism in the county to grow over the next several years. At the same time, almost all respondents agreed that tourism is important for the future of the county.

Respondents see clear advantages to tourism in Hernando County but bring up several challenges that the county must face in the coming years ahead in order to grow responsibly. The clear response about the importance of tourism in the county hopefully indicates a willingness for businesses in the area to help the county address these challenges and maintain current and create new opportunities that will make tourism in Hernando County more attractive for out-of-county visitors.

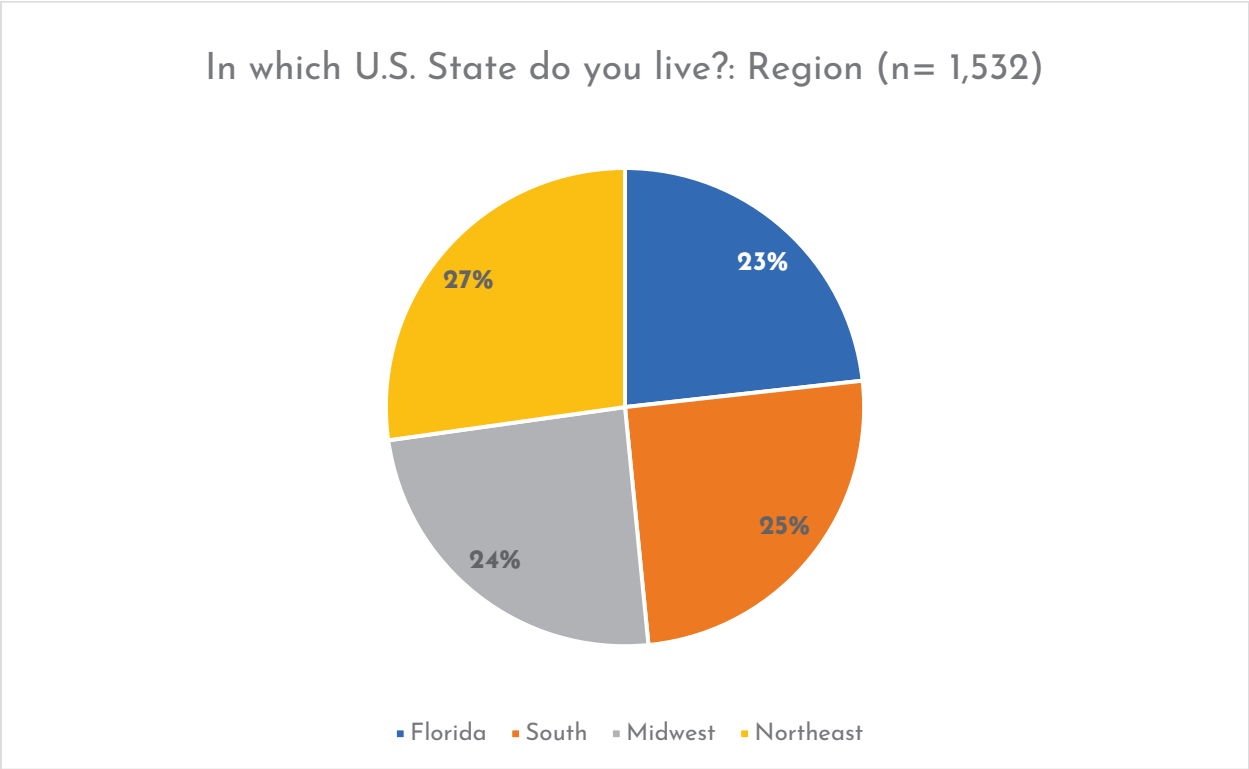


## Brand Awareness Survey (Panel) Findings

From December 5, 2022, to January 12, 2023, a brand perception study was conducted through an online panel survey of US residents who had visited or expressed interest in visiting Central Florida. For the purpose of this study, Central Florida included all counties in the I-4 Corridor, Hernando County, Pasco County, and Citrus County. Areas that were within 1 and a half hours were also allowed. This included areas, but is not limited to, Daytona Beach, Manatee County, and Sarasota County. If respondents stated they were interested in only areas outside of these limits, they were removed from the data set.

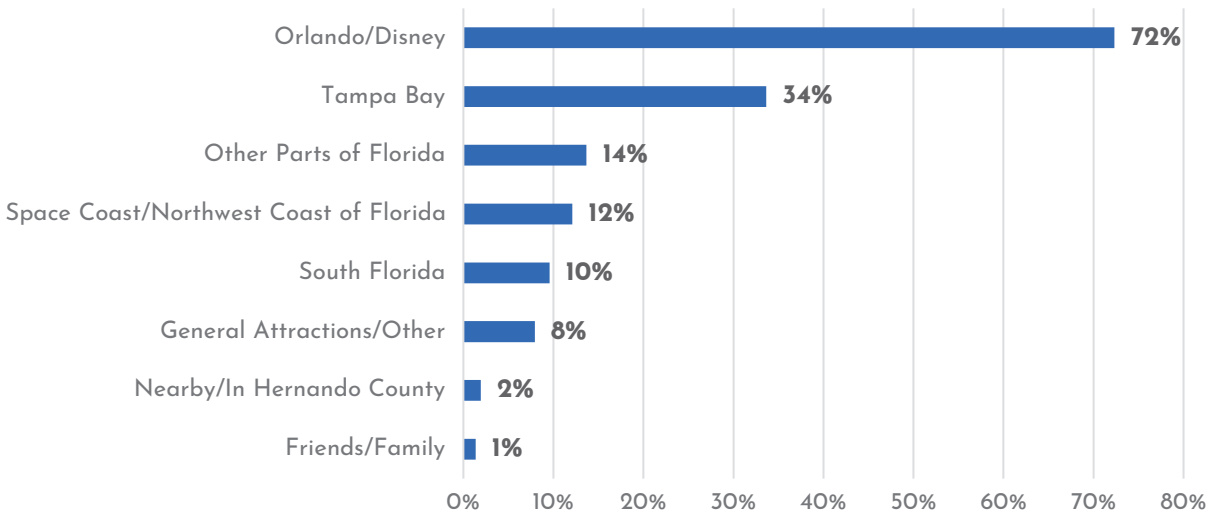
A target of 1,400 survey responses was set prior to survey collection, with 350 responses from each of our 4 target market locations: Florida, Southern U.S. States, Northeastern US States, and Midwestern US States. Regions were grouped based on the areas used by the United States Census Bureau. Based on past visitation trends in Hernando County, areas in the Western United States were not included in the analysis and respondents from those areas were removed from the data set.

### Initial Questions/Screening Questions



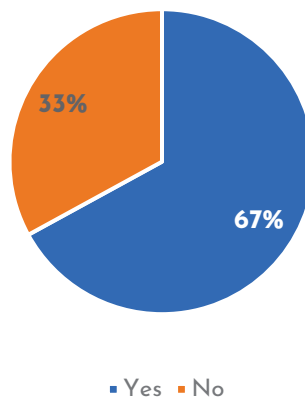
At the end of data collection, we collected 1,532 responses. Of this set, states in the Northeast United States represented the largest group, making up 27% of survey responses. However, as seen in the chart above, there was no meaningful difference in the number of responses from any one region.

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)



People were then asked to write down which areas in Central Florida they had visited or considered visiting. 77% of the sample mentioned that they visited or considered visiting the Orlando area, Disney, or the other attractions in that area. This is not surprising given the audience that amusement parks, like Disney World, have across the country. About a third of the sample (34%) noted visiting or considered visiting the Tampa Bay region. Very few explicitly stated that they had come to the region solely to visit friends or family (1%) or visited/considered visiting Hernando County or the areas around the county. For this question, areas around Hernando County included cities and attractions in Pasco and Citrus counties.

Have you actually visited any part of Central Florida in the past five years? (n= 1,532)

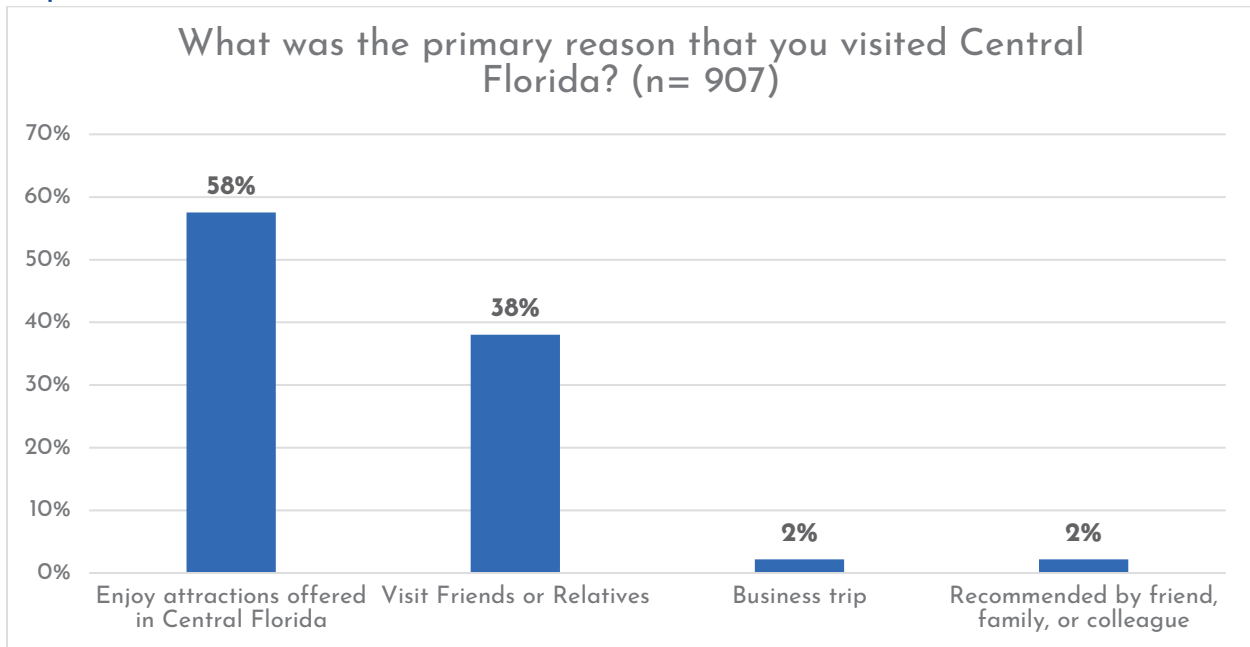


Respondents then reported if they had ever visited any part of Central Florida in the last 5 years. Overall, a supermajority (67%) of respondents reported visiting Central Florida during this period.

Those who reported visiting Central Florida were prompted to answer questions about their visit or visits to Central Florida.

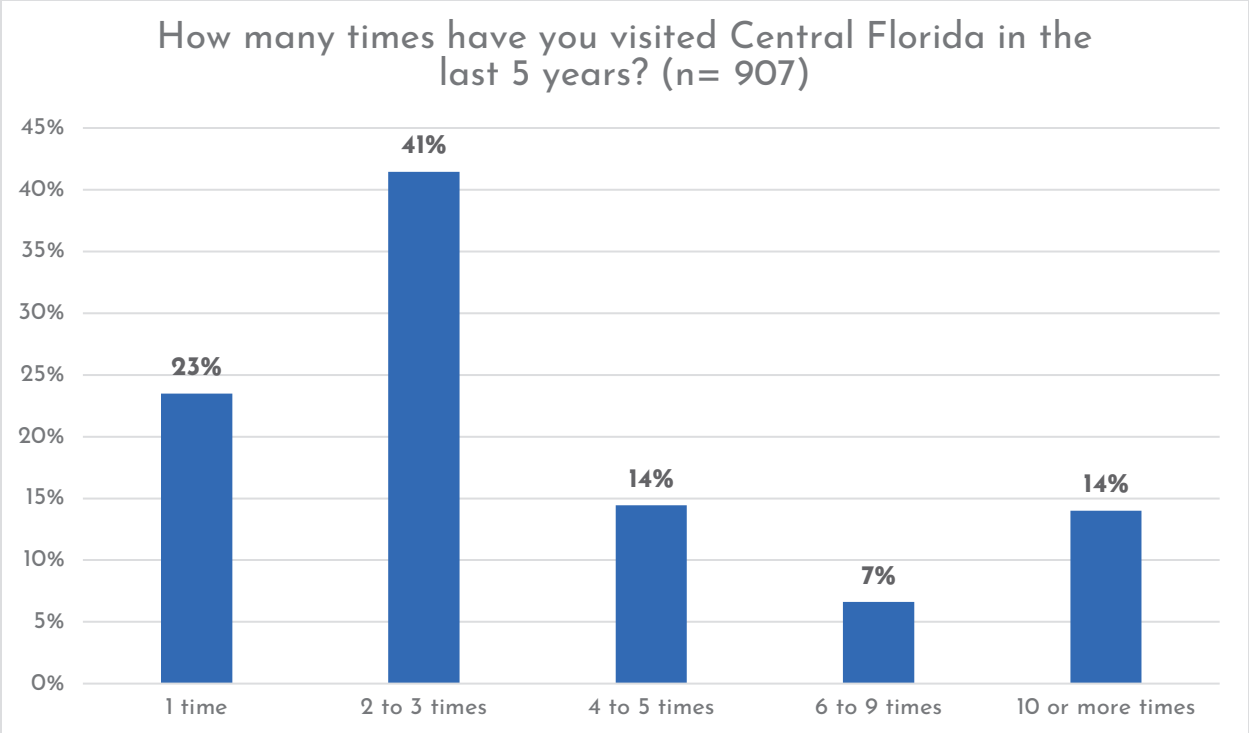
Those who reported they had not visited Central Florida in the last 5 years were directed to the section of questions about their familiarity with Hernando County and their level of interest in the various attractions and amenities offered in the county.

### Experiences in Central Florida



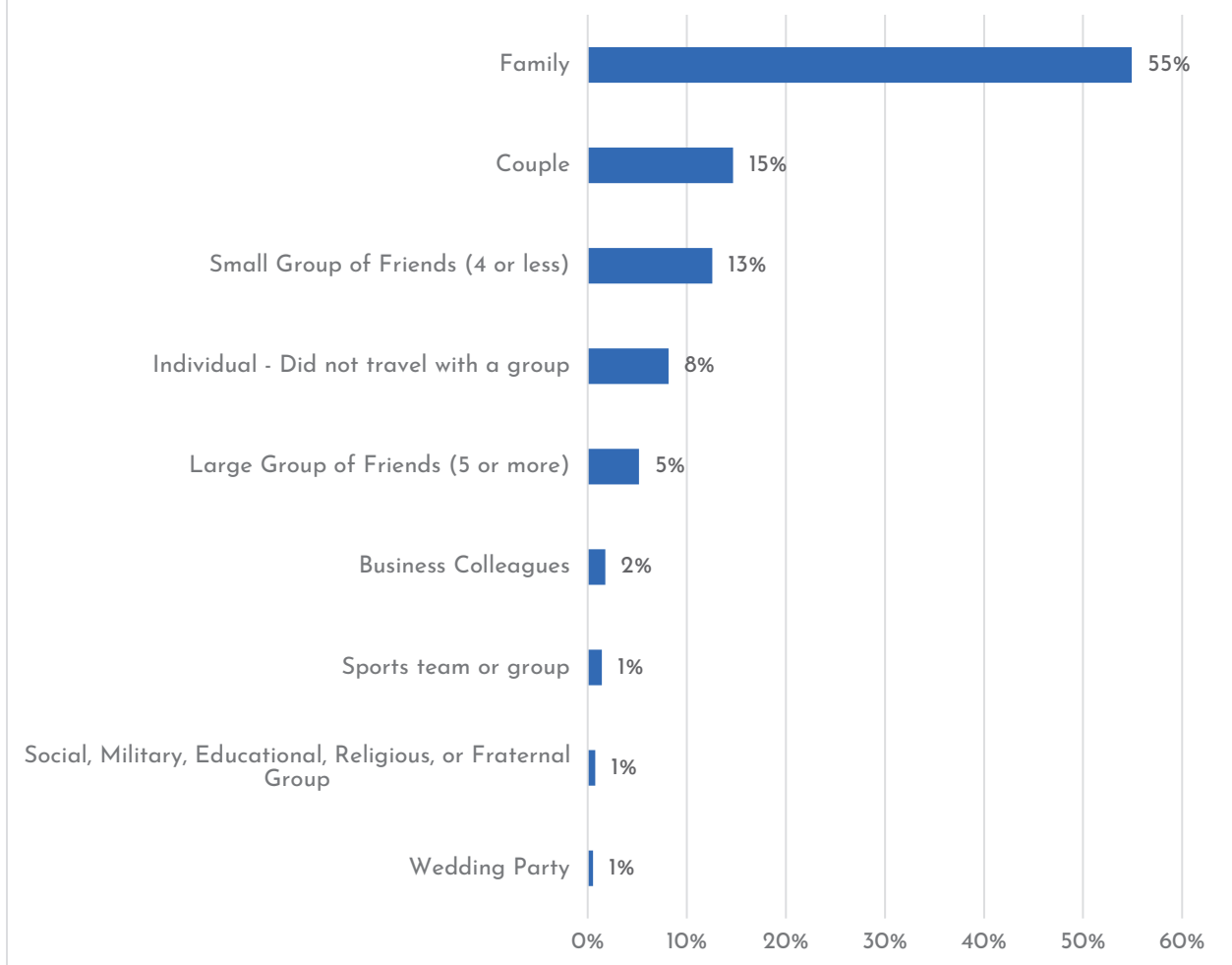
Those who had visited Central Florida were then asked what their primary reason was visiting the region. They were provided four different choices: Enjoy attractions offered in Central Florida, visit friends or relatives, business trip, and recommended by a friend, family, or colleague.

A majority of those surveyed (58%) reported visiting some part of Central Florida to enjoy the attractions offered in the region. More than a third (38%) stated they came primarily to visit a friend or family member. Only 4% reported visiting the area primarily for either business trip (2%) or due to the recommendation of a friend, family member, or colleague (2%).



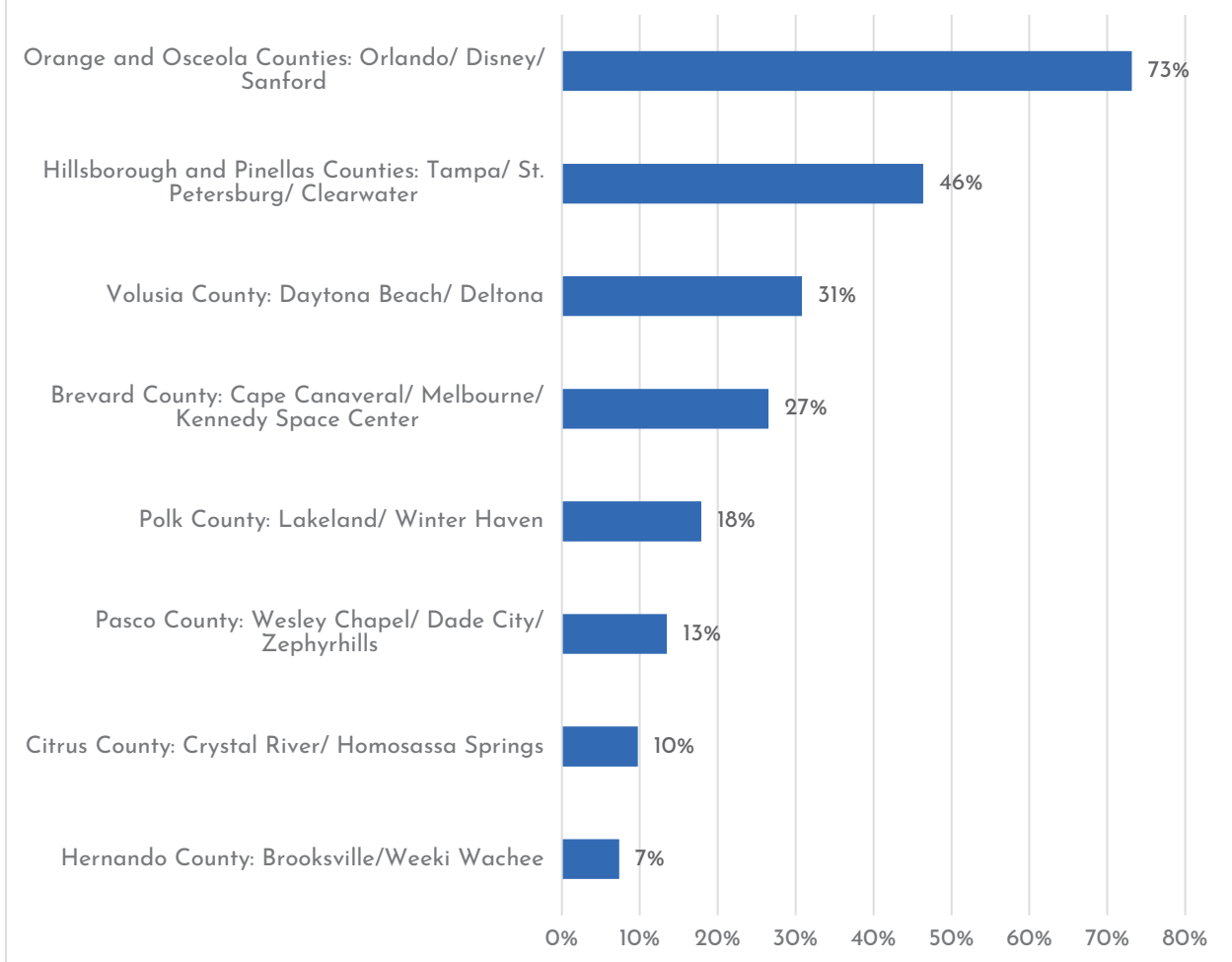
These respondents were then asked how many times they had visited Central Florida during this period. About a fourth of the respondents (23%) reported only visiting the area once during this period. A plurality visited the region 2 to 3 times. About a third (35%) stated they had visited the area 4 or more times in the last 5 years. This suggests that a large segment of the sample visit the region, on average, once a year or more.

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



Next, they were asked what type of group they were with during their most recent visit to Central Florida. A majority of respondents (55%) said they visited the area with family. Only 8% of the sample stated they visited the area alone. About an eighth of the sample came as part of a couple (15%) or with a small group of friends (13%), which was defined as four people or less. This shows that people coming to the region are coming in various, small groups. These travelers may then look for multiple different amenities and activities to meet different desires for a trip. Furthermore, these group may be looking for cost-effective options given the number of people in these groups.

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

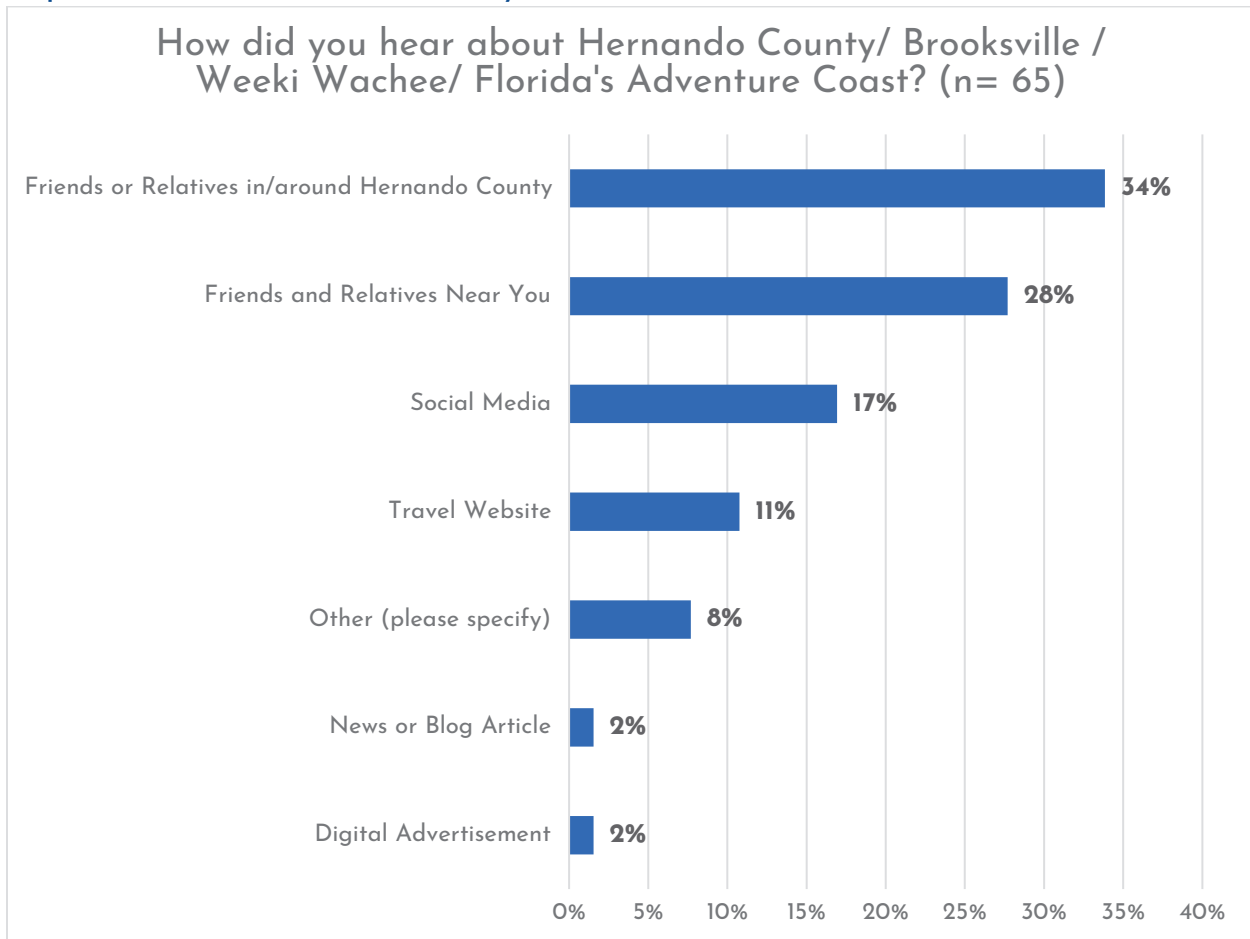


Respondents answered which areas of Central Florida they visited in the last 5 years. They selected all that applied. Responses included the name of counties in Central Florida as well as notable cities and attractions in the area. For example, for Orange and Osceola counties, respondents were prompted with cities like Orlando and Sanford, as well as Disney. Not surprisingly, about 3 in 4 respondents (73%) reported visiting Orange and Osceola counties in the last 5 years. Of all the Central Florida counties asked about, small percentage of the sample (7% of respondents) reported visiting Hernando County in the last 5 years.

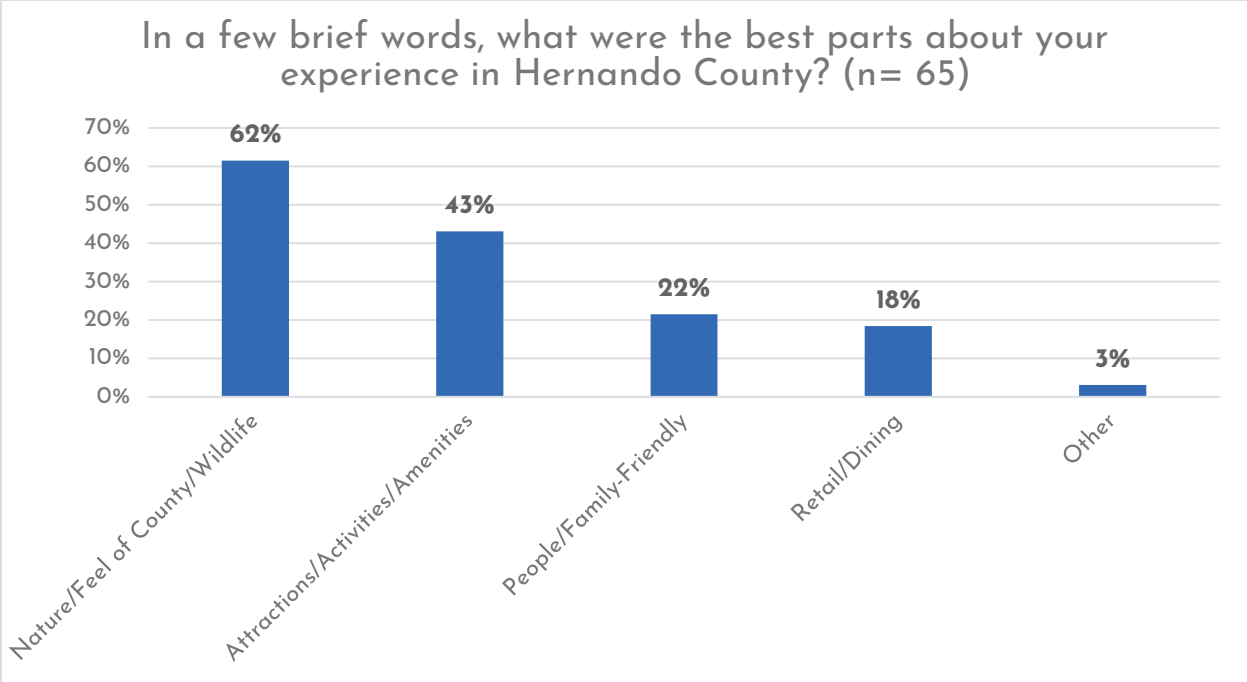
Those who reported visiting Hernando County in the last five years were then directed to answer questions about their visit and experience in the county.

Those who did not report visiting Hernando County in the last 5 years were directed to the section of questions about their familiarity with Hernando County and their level of interest in the various attractions and amenities offered in the county.

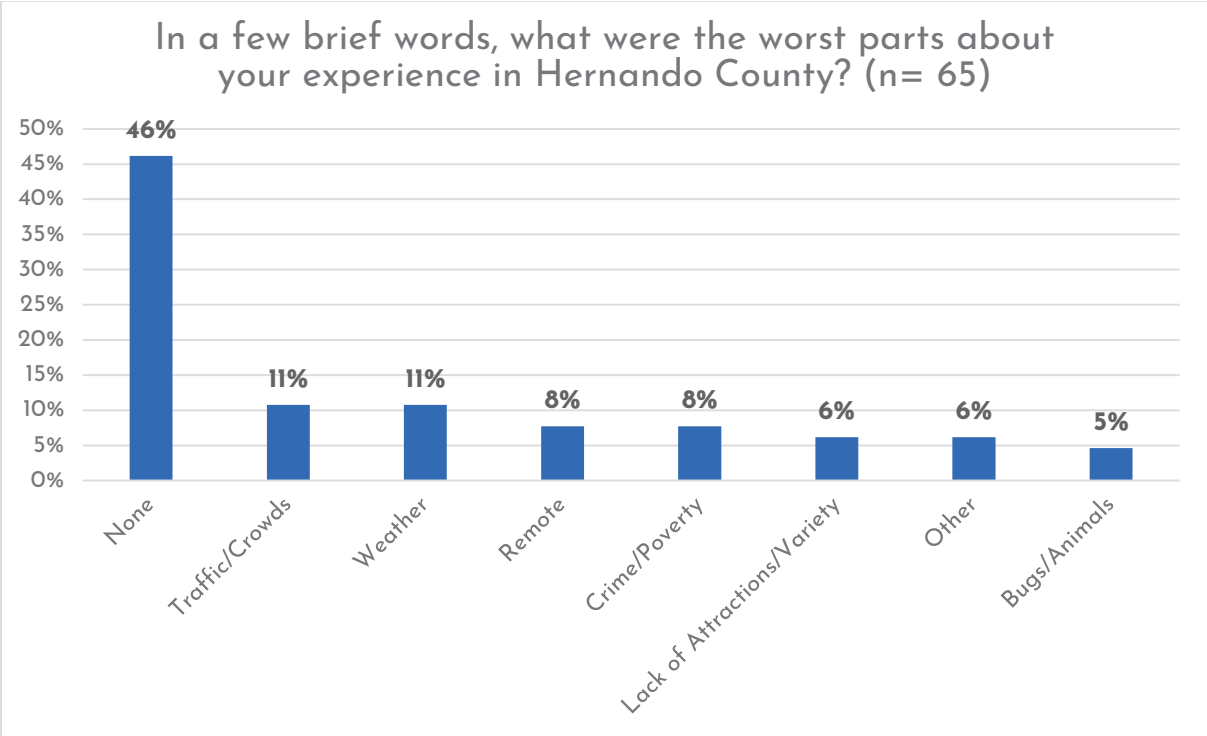
## Experiences in Hernando County



Respondents who reported visiting Hernando County were first asked how they had heard about the area. Around a third (34%) of respondents stated they had heard about the county from friends or relatives that lived in or near Hernando County. More than a fourth (28%) said they had heard about the county from friends or relatives that lived near the respondent. This shows that most of those who had visited the county heard about it through word-of-mouth instead of some third-party source or advertisement.

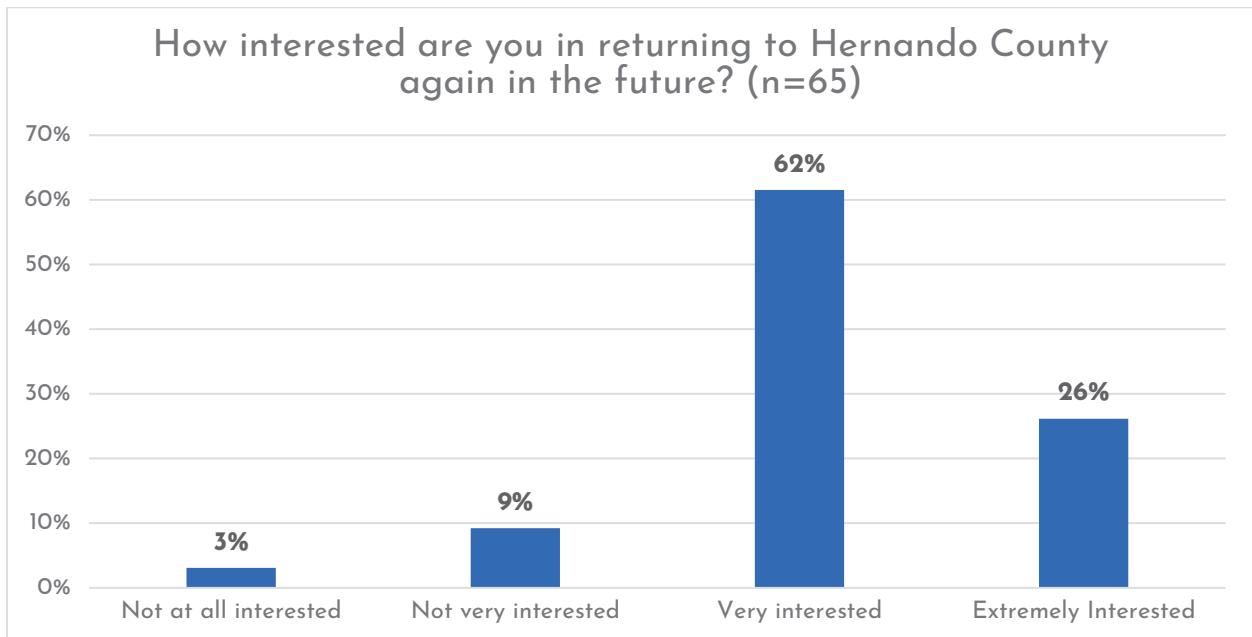


Respondents were then provided an open-ended question that allowed them to discuss the best parts about their experiences in the county. A majority of respondents mentioned the natural aspects of the county. This included their feelings of the county, like quiet, lively, and comfort, as well as the wildlife in the county, such as manatees and alligators. More than 4 in 10 respondents wrote something about the attractions, amenities, or activities offered in the county. This includes responses such as kayaking and the Weeki Wachee Mermaids.



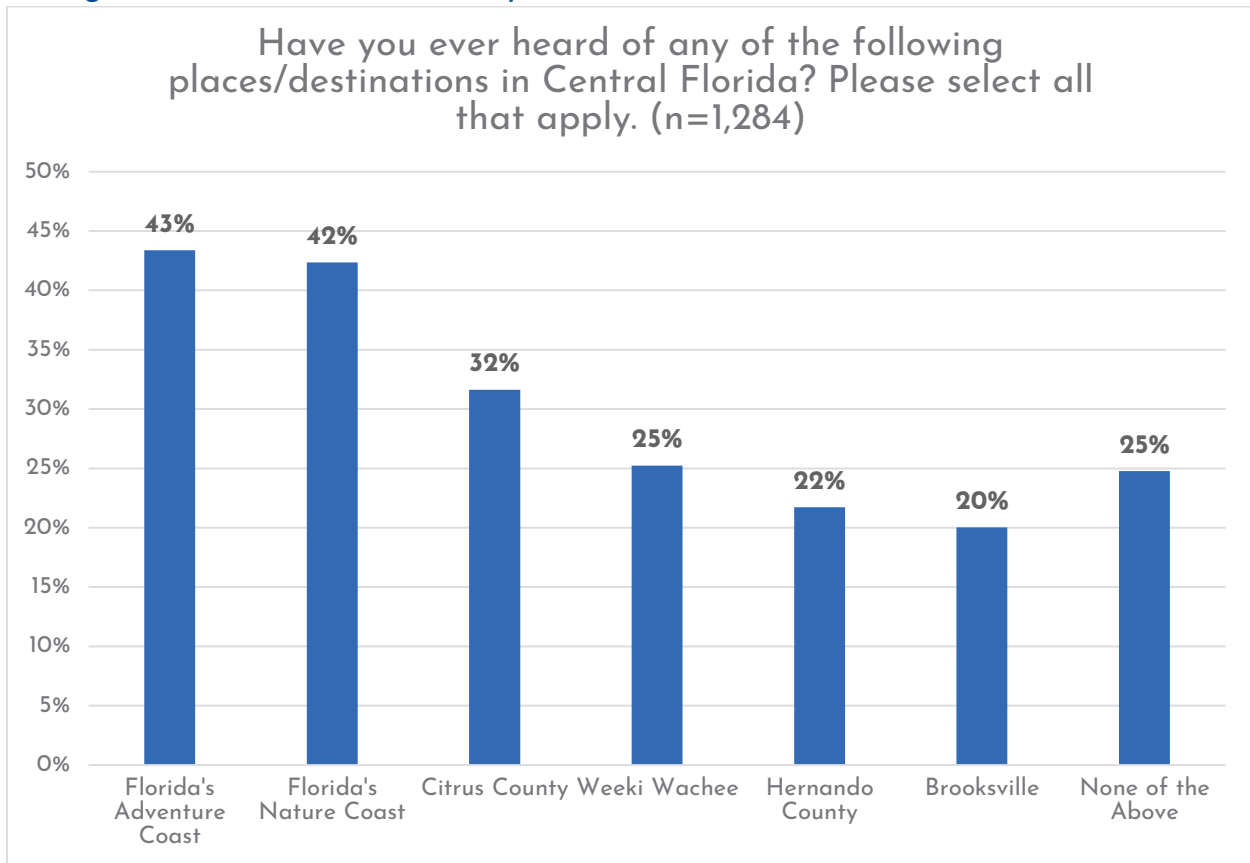


They were then asked about their worst parts of their experience in Hernando County. Nearly half of all respondents (46%) did not report any negative experiences from their time in the county. Of those that reported some negative experience, the largest share of responses was related to traffic and crowdedness of places (11%) and the weather (11%). This is a positive sign that most respondents did not name any bad experience during their time in Hernando County. In addition, complaints about the weather or bugs are not necessarily indictments on the quality of attractions and amenities offered in the county. From this perspective, even fewer visitors in our sample had issues directly related to their experiences with attractions and people in the county.



Finally, these respondents were asked about their interest in returning to Hernando County again in the future. Of this group, 88% expressed some level of interest in returning to the county at a future date. This offers more evidence that visitors to the county are typically satisfied with their experience and are open to returning to the county for leisure activities.

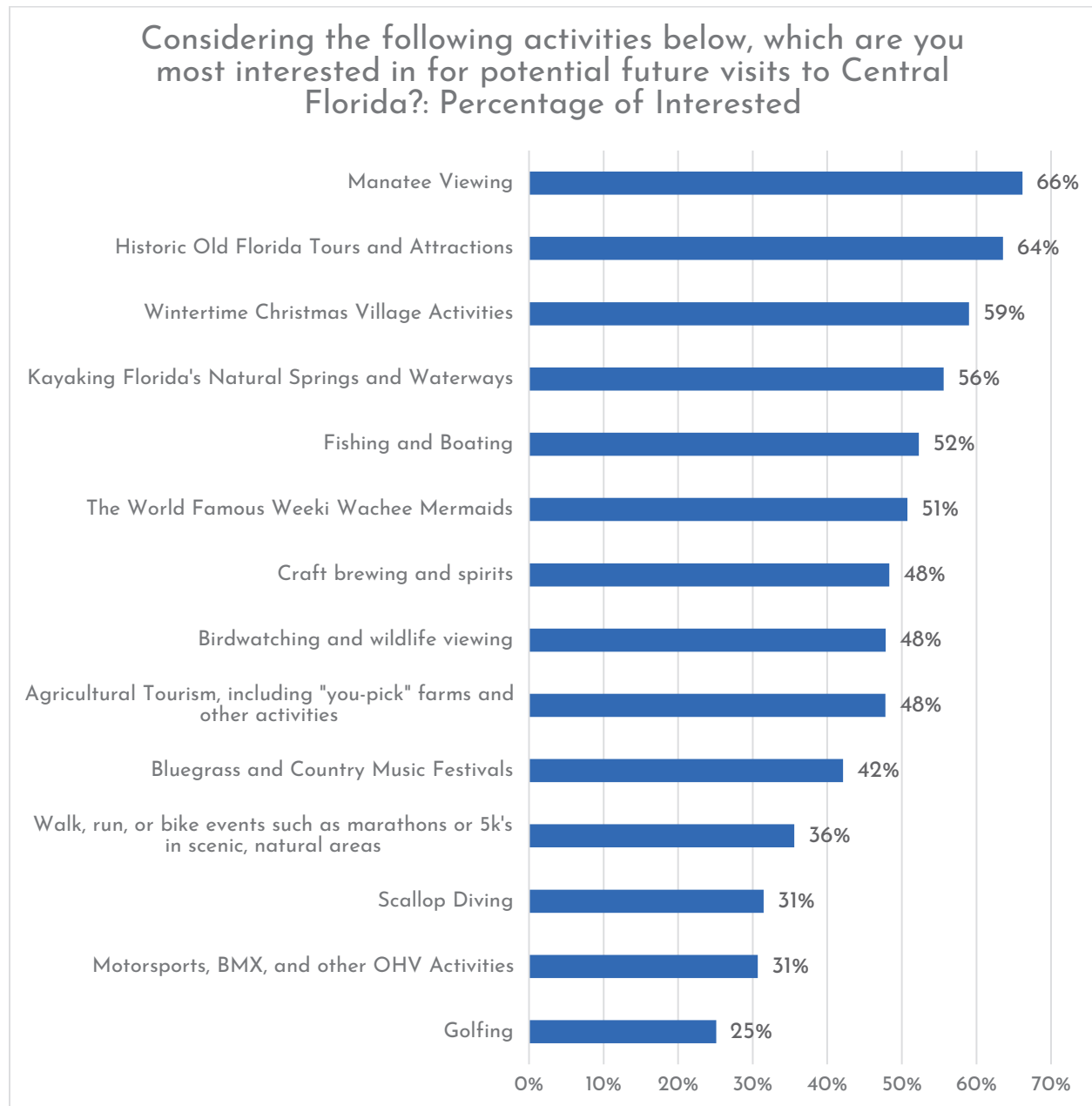
## Recognition of Hernando County



All respondents were asked which of the county names they had heard. Respondents were able to select all names they had heard. Overall, one in four respondents had not heard of any of the names provided. Interestingly, about 4 in 10 respondents report having heard about Florida's Adventure Coast before.

However, it should be noted that these respondents may not be familiar with the location of Hernando County. While Citrus County was included in the list to act as a type of quasi-control, this section of questions does not directly reference what names these areas are associated. The lower percentages from Hernando County, Brooksville, and Weeki Wachee may imply that people are familiar with the name of Florida's Adventure Coast from third-party sources or advertisements, they do not know the exact location or what is included in Florida's Adventure Coast.

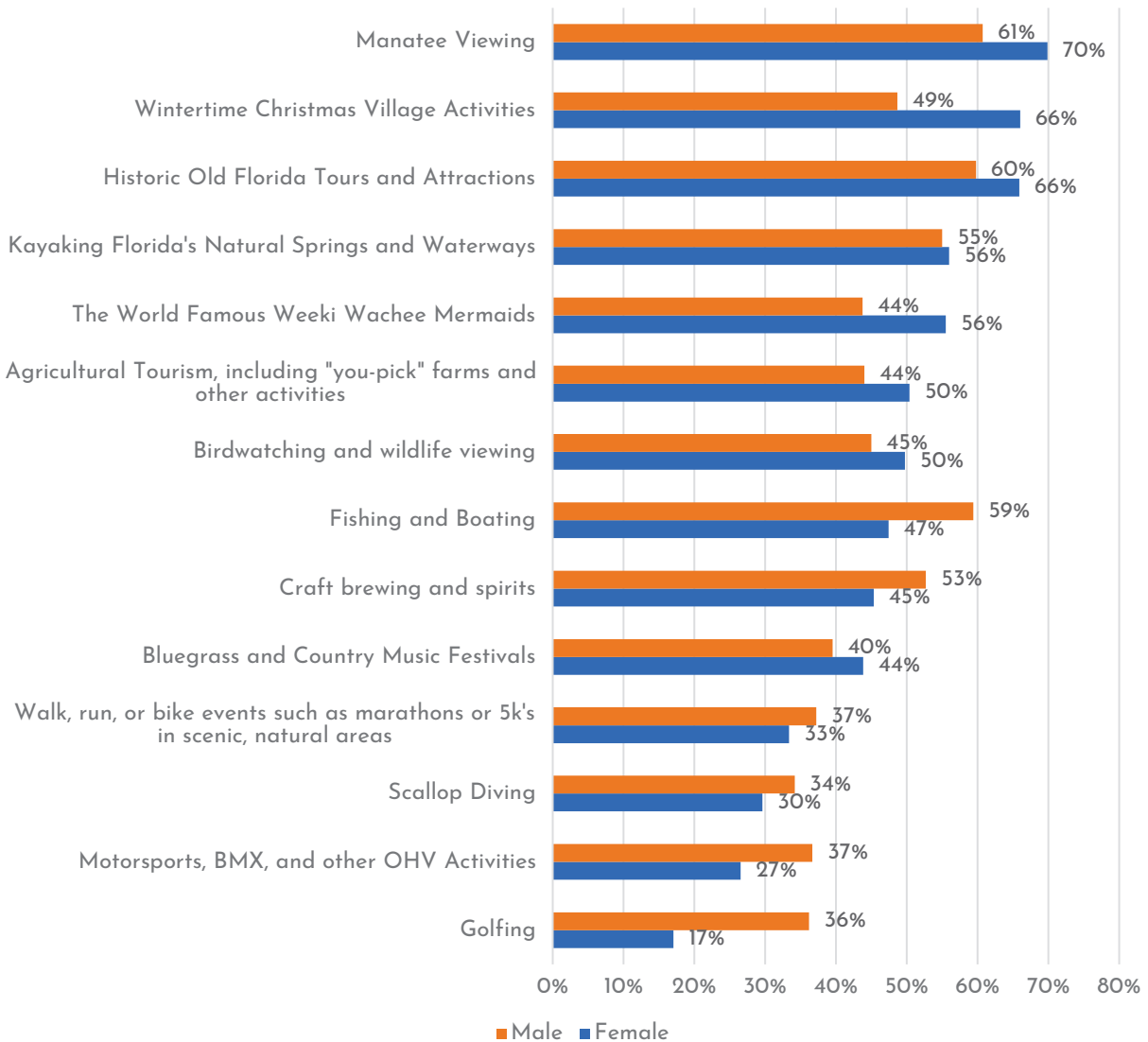
## Interest in Amenities and Activities



Respondents then answered how interested in they were in a series of activities and attractions offered in Hernando County. However, as shown in the graph above, the question asked generally about Central Florida. This means that those interested represent potential target audiences for Hernando County's tourism and what is most attractive to out-of-market visitors.

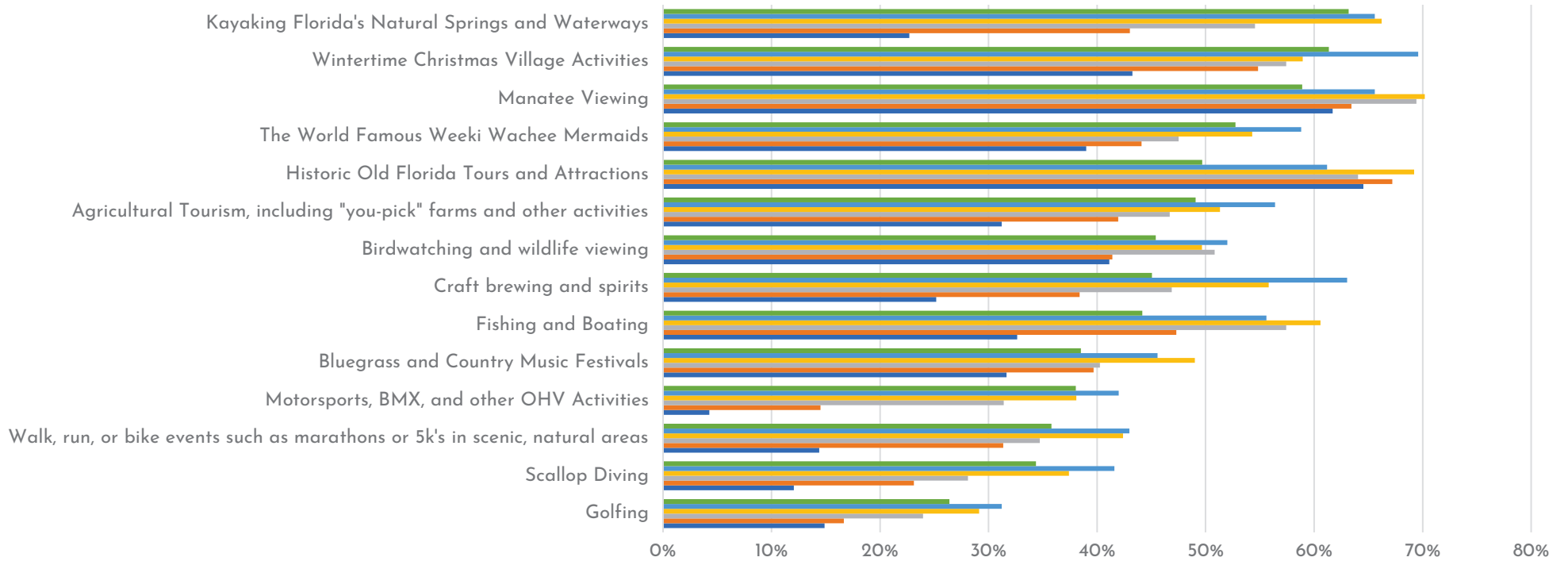
About 2 in every 3 respondents were interested in manatee viewing (66%) and Old Florida tours and attractions (64%). Nearly or more than half of the sample expressed some level of interest in 9 of 14 activities gauged in the survey. These findings show that even if respondents have not visited Hernando County, they do express noticeable levels of general interest in several of the activities and attractions offered in the county. Those close to or above the 50% threshold, moreover, are more attractive to a wider audience and offer the best avenues to attract new visitors to the county.

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



Looking and interest in amenities and attractions based on gender, we see some differences between those who identified as female and those who identified as male. Notably, female respondents were likely to express some level of interest in manatee viewing, wintertime Christmas Village activities, and the Weeki Wachee Mermaids. Male respondents, on the other hand, expressed more interest in fishing and boating, craft brewing and spirits, motorsports, and golfing. Overall, female respondents were more likely to express greater interest in more leisure activities whereas male respondents were more interested in active adventure activities.

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



	Golfing	Scallop Diving	Walk, run, or bike events such as marathons or 5k's in scenic, natural areas	Motorsport s, BMX, and other OHV Activities	Bluegrass and Country Music Festivals	Fishing and Boating	Craft brewing and spirits	Birdwatchin g and wildlife viewing	Agricultural Tourism, including "you-pick" farms and other activities	Historic Old Florida Tours and Attractions	The World Famous Weeki Wachee Mermaids	Manatee Viewing	Wintertime Christmas Village Activities	Kayaking Florida's Natural Springs and Waterways
■ 18-24	26%	34%	36%	38%	39%	44%	45%	45%	49%	50%	53%	59%	61%	63%
■ 25-34	31%	42%	43%	42%	46%	56%	63%	52%	56%	61%	59%	66%	70%	66%
■ 35-44	29%	37%	42%	38%	49%	61%	56%	50%	51%	69%	54%	70%	59%	66%
■ 45-54	24%	28%	35%	31%	40%	57%	47%	51%	47%	64%	48%	69%	57%	55%
■ 55-64	17%	23%	31%	15%	40%	47%	38%	41%	42%	67%	44%	63%	55%	43%
■ 65+	15%	12%	14%	4%	32%	33%	25%	41%	31%	65%	39%	62%	43%	23%

■ 18-24 ■ 25-34 ■ 35-44 ■ 45-54 ■ 55-64 ■ 65+

When examining levels of interest based on age, we also see some differences. First, respondents between the ages of 25 and 44 generally expressed the greatest level of interest in all the amenities and attractions offered in the county. This may be due to a greater desire to travel amongst this group, more disposable income to travel or enjoy activities, or the presence (or absence) of children in the home. Second, the oldest age group, respondents 65 years of age and older, typically expressed the least amount of interest in all activities. This may be due to a lack of ability to travel due to being on a fixed income or the lack of desire to travel, in general. The only activity that gained more interest as respondents got older was interest in historic old Florida tours and attractions.

<b>Considering the following activities below, which are you most interested in for potential future visits to Central Florida?</b>						
<b>Percentage of Interested by Income</b>						
	<b>Under \$25,000</b>	<b>Between \$25,000 and \$49,999</b>	<b>Between \$50,000 and \$74,999</b>	<b>Between \$75,000 and \$99,999</b>	<b>Between \$100,000 and \$149,999</b>	<b>Over \$150,000</b>
<b>Wintertime Christmas Village Activities</b>	63%	57%	60%	58%	57%	57%
<b>Historic Old Florida Tours and Attractions</b>	63%	62%	67%	67%	60%	55%
<b>Manatee Viewing</b>	60%	66%	70%	61%	66%	72%
<b>Kayaking Florida's Natural Springs and Waterways</b>	52%	54%	58%	53%	56%	64%
<b>The World Famous Weekly Wachee Mermaids</b>	51%	58%	50%	51%	39%	47%
<b>Fishing and Boating</b>	48%	52%	54%	56%	54%	44%
<b>Birdwatching and wildlife viewing</b>	46%	50%	52%	49%	45%	33%
<b>Agricultural Tourism, including "you-pick" farms and other activities</b>	46%	51%	53%	47%	41%	36%
<b>Craft brewing and spirits</b>	46%	51%	49%	47%	49%	43%
<b>Bluegrass and Country Music Festivals</b>	44%	42%	43%	45%	40%	33%
<b>Walk, run, or bike events such as marathons or 5k's in scenic, natural areas</b>	33%	36%	38%	36%	34%	36%
<b>Motorsports, BMX, and other OHV Activities</b>	30%	33%	31%	33%	27%	19%
<b>Scallop Diving</b>	28%	28%	36%	32%	33%	33%
<b>Golfing</b>	19%	20%	27%	30%	31%	27%

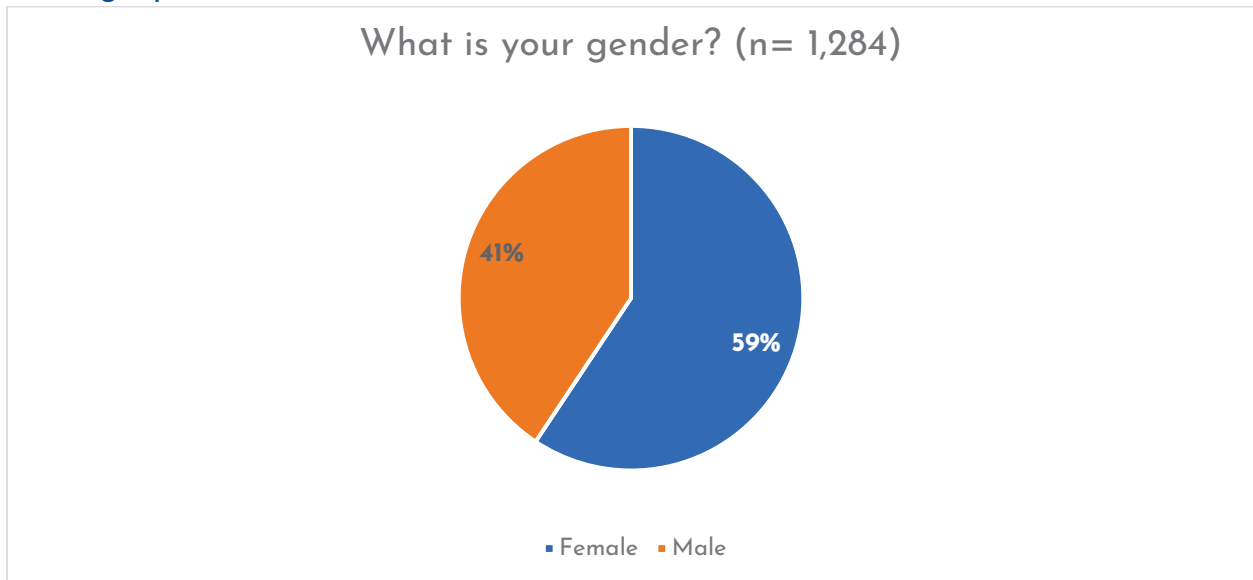
When looking at interest levels based on income, we see most idiosyncratic patterns that only hold for a few activities. There is similar interest, regardless of income, for "walk, run, and bike events" and "wintertime Christmas Village activities." However, households making less than \$100,000 express the most interest in motorsports and "historic old Florida tours and attractions." One finding that was expected but is notable to point out is the correlation between income and interest in golf. As household income increases amongst the sample, respondents are more likely to express interest in golfing. This is important since Florida is well known for the variety of golf courses across the state. Hernando County is home to 16 different

golf courses, including the Cabot Citrus Golf Club, currently under renovation. This course was ranked as one of the top 50 golf courses in the state of Florida by Golf Digest. This attraction offers an opportunity to attract a dedicated and lucrative clientele to the county.

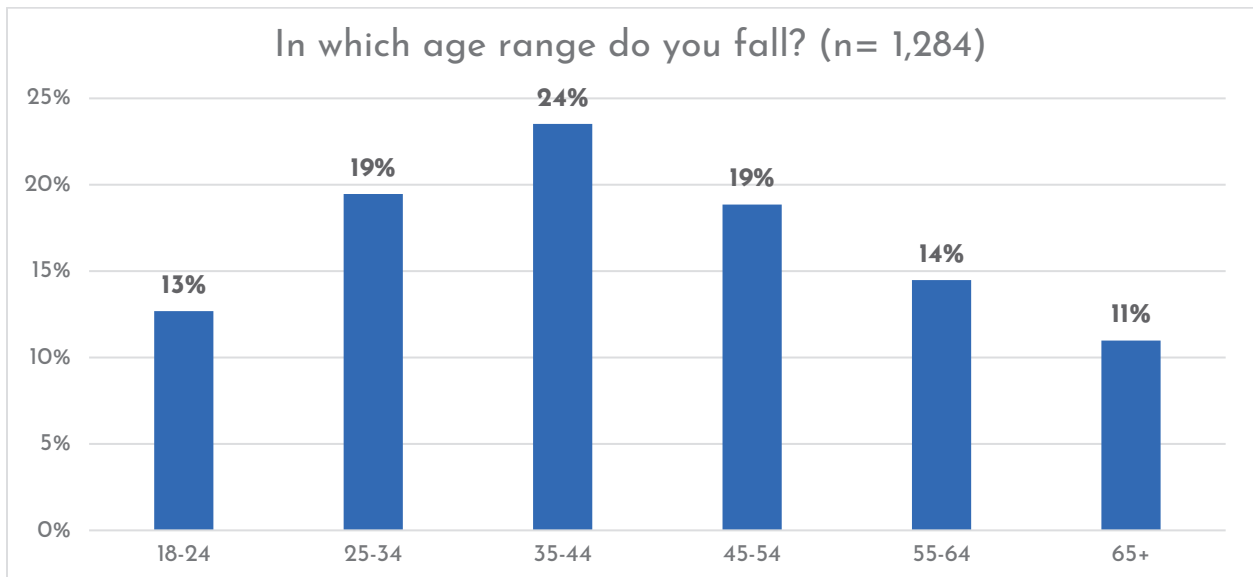
<b>Considering the following activities below, which are you most interested in for potential future visits to Central Florida?</b>				
<b>Percentage of Interested by Race and Ethnicity</b>				
	<b>White or Caucasian</b>	<b>Black or African American</b>	<b>Hispanic or Latino</b>	<b>Other race</b>
<b>Kayaking Florida's Natural Springs and Waterways</b>	53%	61%	59%	66%
<b>The World Famous Weeki Wachee Mermaids</b>	48%	58%	48%	60%
<b>Scallop Diving</b>	29%	35%	37%	44%
<b>Manatee Viewing</b>	69%	58%	63%	64%
<b>Fishing and Boating</b>	51%	55%	55%	54%
<b>Wintertime Christmas Village Activities</b>	57%	63%	65%	67%
<b>Motorsports, BMX, and other OHV Activities</b>	25%	45%	44%	42%
<b>Bluegrass and Country Music Festivals</b>	40%	44%	47%	56%
<b>Historic Old Florida Tours and Attractions</b>	65%	61%	57%	66%
<b>Walk, run, or bike events such as marathons or 5k's in scenic, natural areas</b>	31%	47%	48%	41%
<b>Birdwatching and wildlife viewing</b>	46%	48%	56%	54%
<b>Golfing</b>	23%	29%	30%	29%
<b>Agricultural Tourism, including "you-pick" farms and other activities</b>	44%	52%	59%	60%
<b>Craft brewing and spirits</b>	45%	58%	56%	55%

Regarding levels of interest based on race, we see that non-white respondents generally expressed more interest in most activities. White respondents expressed more interest in manatee viewing and historic old Florida tours and attractions.

## Demographics

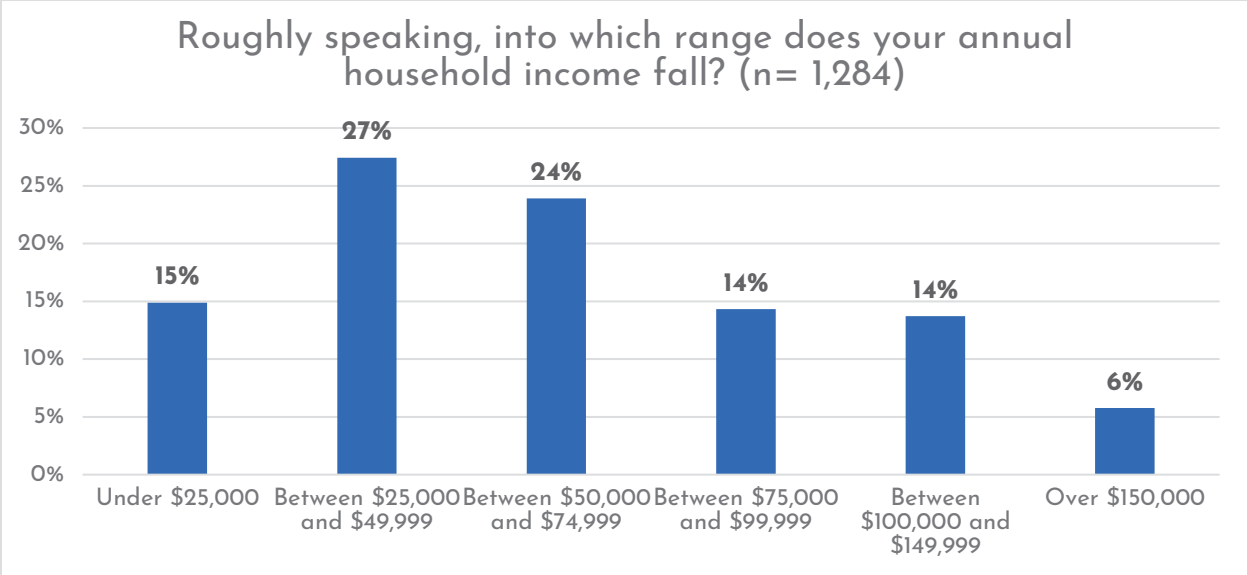


A majority of the online sample identified as female (59%). This is not surprising, as those who identify as female are generally more likely to respond to online surveys.

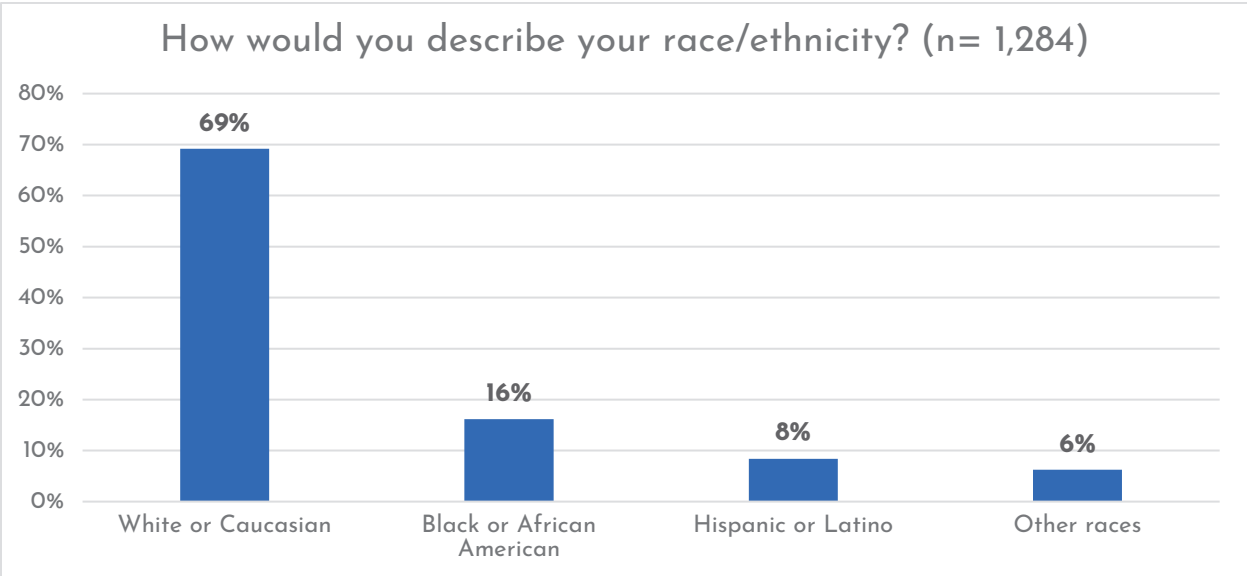


Regarding age, the sample was nicely distributed across age groups. The sample represents a large amount for all age groups and demonstrates a relatively normal distribution of age.





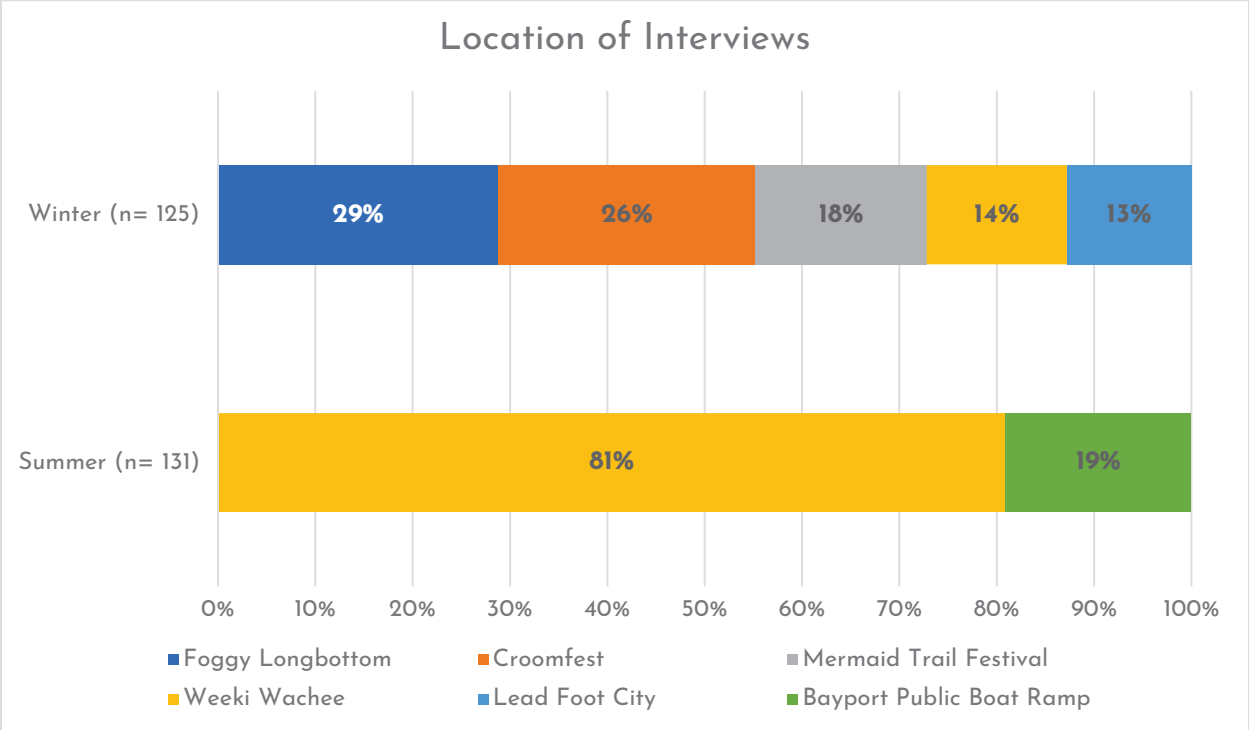
The income range of the sample was also relatively normally distributed. In addition, most of the sample would be categorized as either working class or middle class (between \$25,000 and \$99,999).



Finally, a majority of the sample identified their race and ethnicity as white. While not surprising, it is a positive sign that a large percentage of the sample identified as either Black or Hispanic respondents. This helps indicate that the sample reached a broad, racially and ethnically diverse group.

# Brand Perception Survey (Dispatch) Findings

To assess the perception of the county from out-of-market visitors, a brand perception survey was conducted. Out-of-market visitors were interviewed through in-person intercepts and various attractions and events held in Hernando County. We conducted two different sets of dispatch interviews: one during summer months (July and August 2022) and a second during winter months (January and February 2023). Interviewing during these different times was done to gather insights from visitors who take part in the various activities hosted in the county and to capture potential seasonality differences in perceptions of Hernando County. For each set of interviews, we targeted at least 125 respondents. In total, we obtained 131 summer dispatch interviews and 125 winter dispatch interviews.



In the summer, we conducted dispatch interviews at two different locations, the Weeki Wachee Spring Kayak Entrance and Bayport Public Boat Ramp. Of these interviews, 81% were completed at Weeki Wachee Springs and the remaining 19% were conducted at Bayport Public Boat Ramp. We did spend one day at the Hernando Beach Public Boat Ramp, but we were not able to conduct any interviews due to a lack of interest or because users were residents of Hernando County.

During the winter, we wanted to make sure that we did not gather too many interviews from any one location. Prior to entering the field, we decided not to gather more than 40 interviews from any one event. In the end, we conducted dispatch interviews at 5 different locations: 1) Lead Foot City (13%), 2) Foggy Longbottom Folk Festival (29%), 3) Weeki Wachee Spring Kayak Entrance (14%), Croomfest (26%), and the Mermaid Trail Festival (18%).

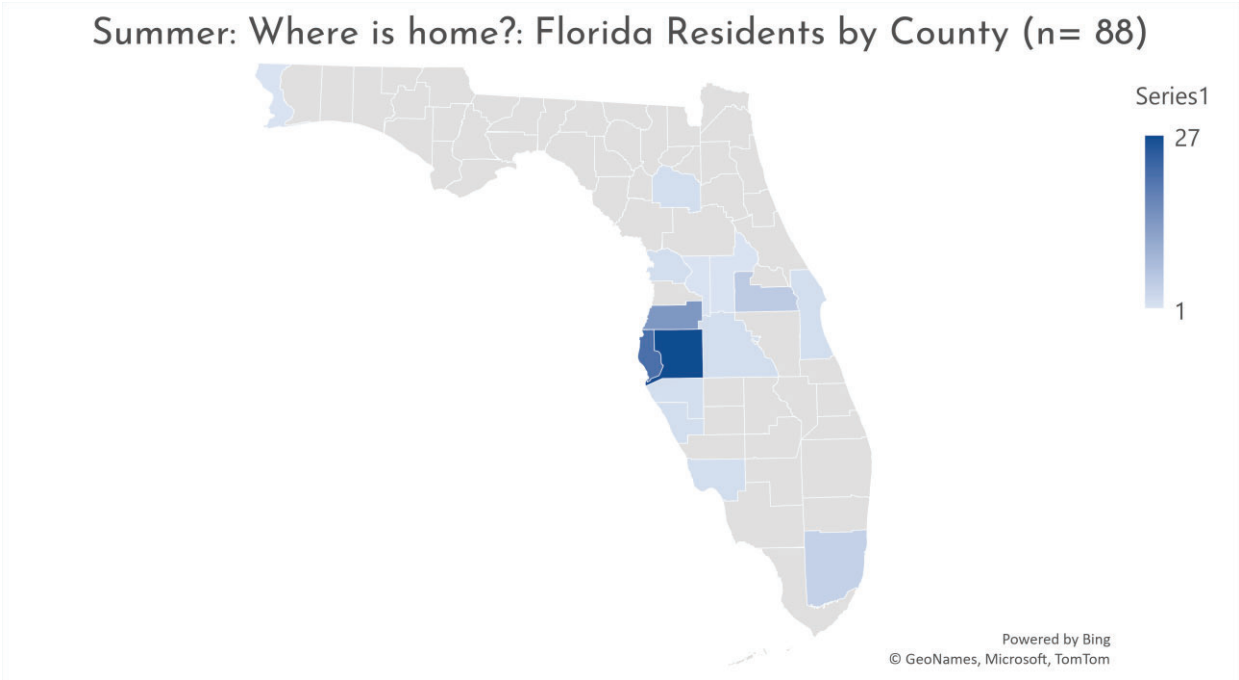
In the interview, we asked respondents 6 different questions. Most questions were used in both summer and winter dispatches with one change made between the two. In the summer, we asked respondents if the COVID-19 pandemic had any effect on their traveling to Hernando County over the last 5 years. In the winter, we asked respondents if they were staying overnight or driving home after the event.

Summer Dispatches (n= 131)		
Where is home?	Frequency	Percentage
Florida	88	67%
Missouri	4	3%
Ohio	3	2%
Georgia	3	2%
Pennsylvania	3	2%
Virginia	3	2%
California	3	2%
Oklahoma	2	2%
Texas	2	2%
Kentucky	2	2%
Minnesota	2	2%
China	1	1%
Indiana	1	1%
Alabama	1	1%
Michigan	1	1%
Ireland	1	1%
Connecticut	1	1%
Norway	1	1%
France	1	1%
Illinois	1	1%
Nevada	1	1%
Tennessee	1	1%
New Jersey	1	1%
Thailand	1	1%
New York	1	1%
Maryland	1	1%
North Carolina	1	1%

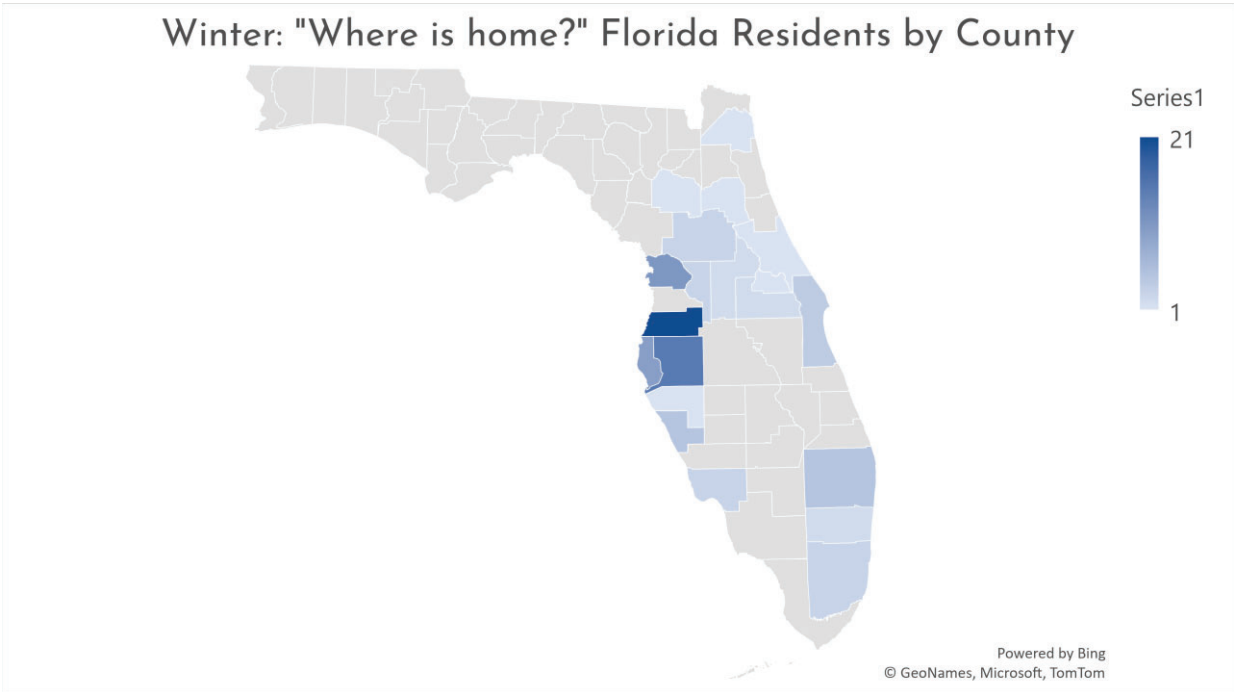
First, we asked respondents where they lived. In the summer, respondents came from 23 different states and 4 countries outside of the United States. In the winter, respondents came from 16 different states and 4 countries from outside of the United States. In both the summer (67%) and winter (76%), a supermajority of respondents came from different parts of Florida. In the summer, most out-of-state respondents came from Southern states (16 respondents) followed by visitors from Midwestern states (12 respondents). A smaller number of respondents came from states in the Northeast (6 respondents) and Western states (4 respondents).

Winter Dispatches (n= 125)		
State	Count of State	Percentage
Florida	95	76%
New York	4	3%
Pennsylvania	3	2%
Ontario	2	2%
Ohio	2	2%
Maryland	2	2%
Alaska	2	2%
Wisconsin	2	2%
Indiana	1	1%
Massachusetts	1	1%
Amsterdam	1	1%
Colorado	1	1%
Illinois	1	1%
Minnesota	1	1%
Oregon	1	1%
New Jersey	1	1%
Utah	1	1%
Costa Rica	1	1%
Nova Scotia	1	1%
Michigan	1	1%
The Bahamas	1	1%

In the winter, respondents from Northeastern states made up the majority of out-of-state visitors. Only two respondents were from Southern states. A similar number of respondents came from Western states in the winter as in the summer.

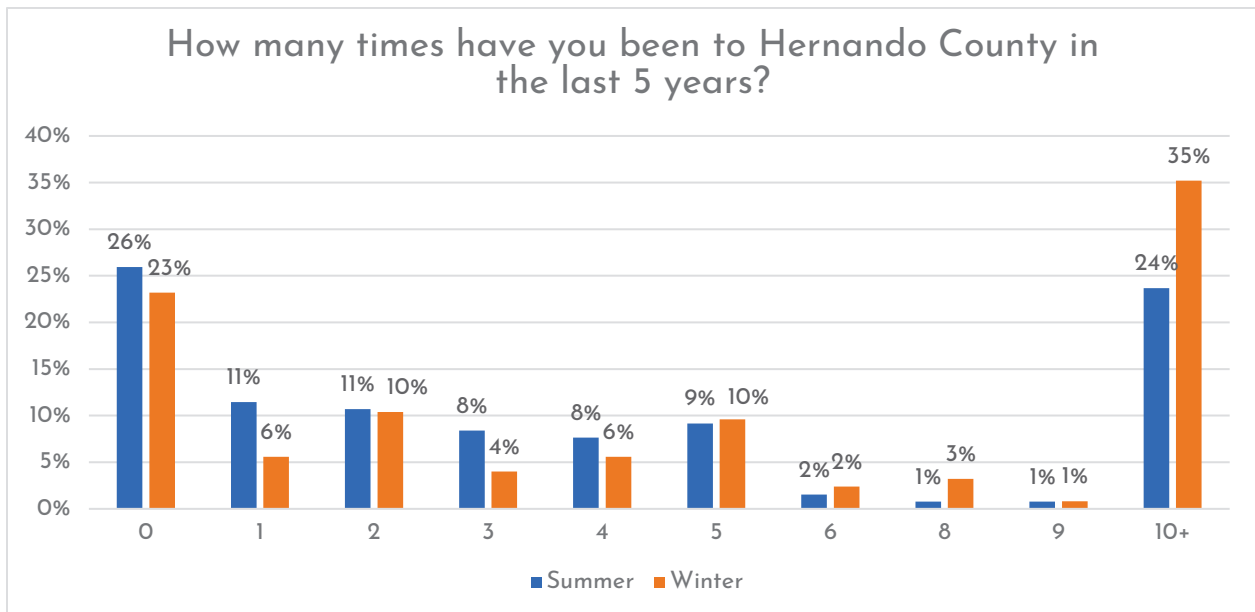


For Florida residents, we wanted to see where in the state that visitors lived. In the summer, 73% of Florida respondents came from either Hillsborough, Pinellas, Citrus or Pasco counties. That means that a large majority of visitors came from counties that were within a short drive of Hernando County. In turn, these visitors were likely visiting the county on a day trip instead of staying in the county overnight.



In the winter, 60% of respondents came from either Pasco, Hillsborough, Citrus, or Pinellas counties. As shown in the map respondents from Florida came from across the state more in the winter than in the summer. For example, while some respondents were from Miami-Dade County in the summer, we had respondents from the three large South Florida counties

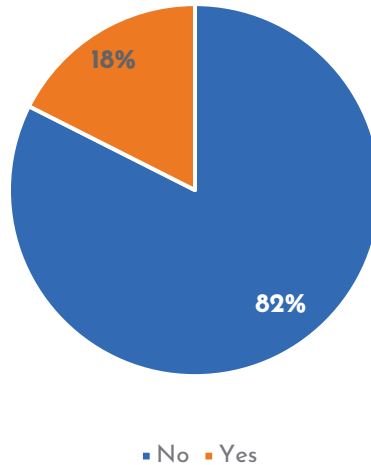
(Broward, Palm Beach, and Miami-Dade) in the winter. Additionally, there was a greater representation of Central Florida and Northern Florida counties in the winter than the summer. This may suggest that the events and activities in Hernando County in the winter may be unique to the area and are not replicated in other parts of the state as well.



The next question asked respondents how often they visited Hernando County in the last 5 years. In both the summer (52%) and the winter (61%), a majority of respondents reported visiting the county at 3 times or more in the last 5 years. This is a good sign that visitors are satisfied enough with their visits to the county that they want to visit multiple times. A similar number of visitors in the summer (26%) and winter (23%) were visiting Hernando County for the first time. This shows that the county, regardless of the time of year, continues to draw in new visitors from across the state.

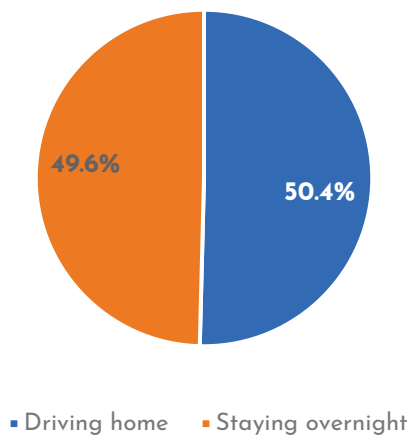
A notable difference between our summer respondents and winter respondents were those who visited the county 10 times or more in the last 5 years. Winter respondents were markedly more likely to report having visited the county 10 times or more than summer respondents. This is another indicator of the draw of events, activities, and attractions offered in the winter that draw people back to the county more than summer attractions.

Summer: Did COVID-19 have any impact on how often you visited Hernando County in the last few years?  
(n= 131)

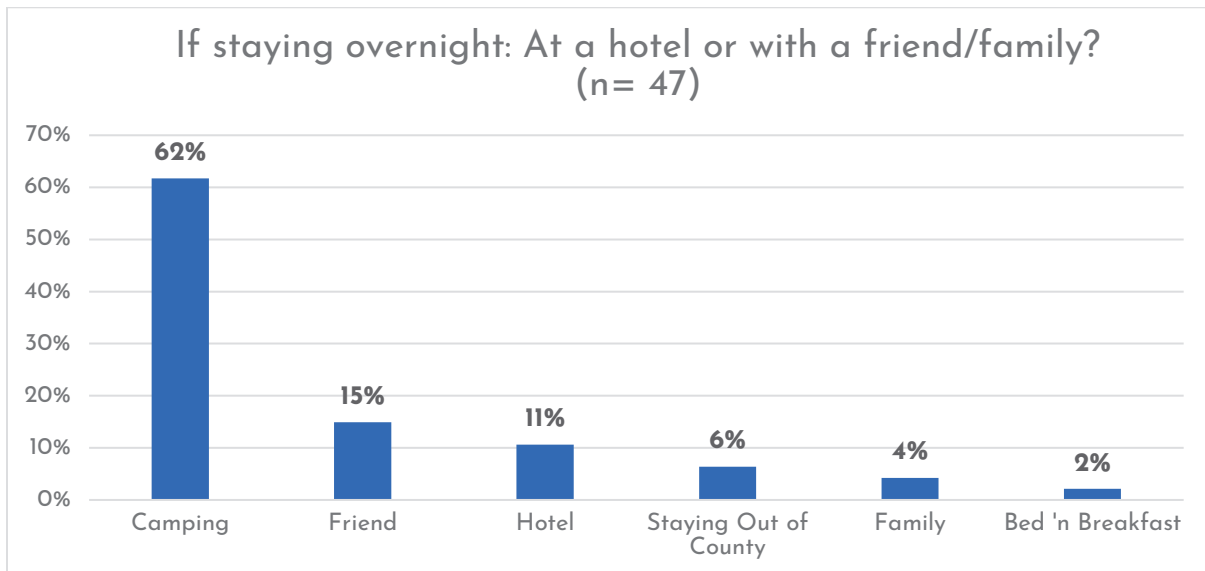


In the summer, a large majority (82%) of respondents mentioned that COVID-19 did not impact them visiting the county. Of the respondents that reported that COVID-19 did impact them traveling to the county, we probed further about the impact on their travel to Hernando County. Responses fell into three different groups. First, some respondents reported that their destination was closed for some time, deterring them from traveling to the county. Second, other respondents noted that travel during 2020 was impacted, but that was the only year and they returned in 2021. Only one respondent explicitly noted that they did not travel in 2020 and 2021. Finally, the remaining respondents noted they, in general, stayed at home more or traveled less. These small groups show that COVID had some impact on tourism to Hernando County, but this impact was mostly isolated in 2020.

Winter: Are you staying overnight in the County or do you plan on driving home after the event?  
(n= 125)



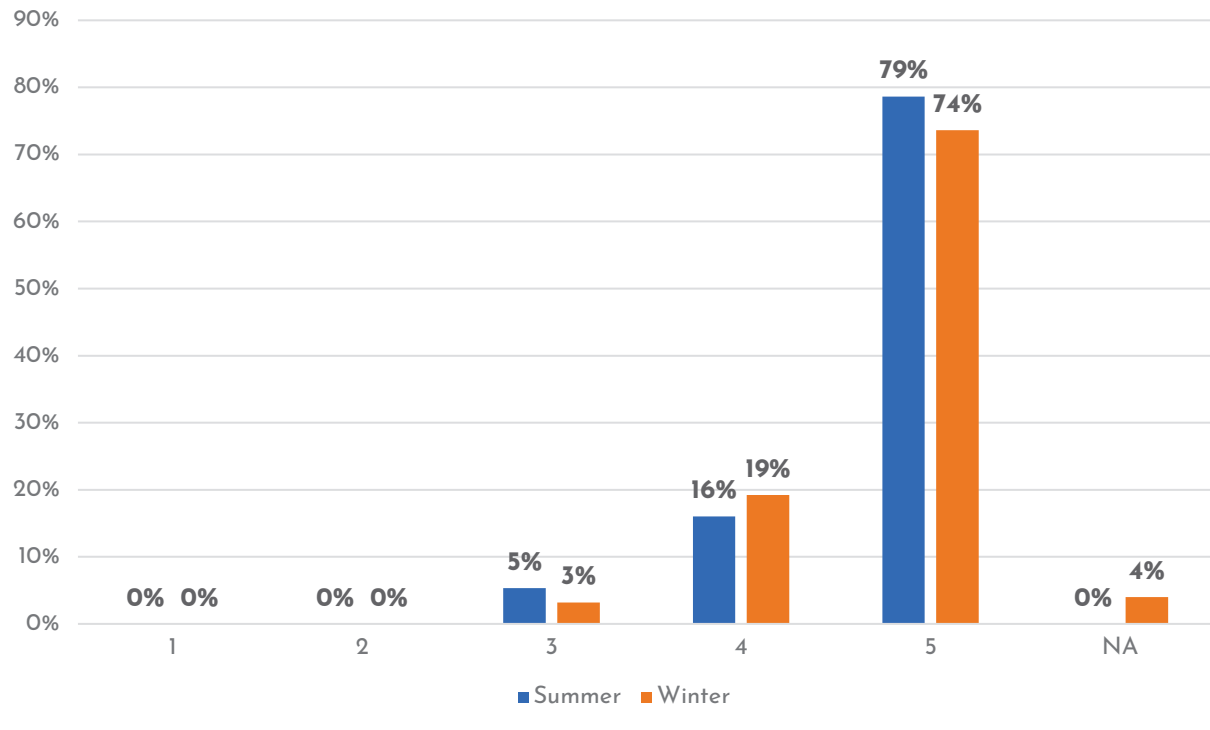
Due to the findings from the summer dispatch responses, the COVID-19 question was not asked during winter dispatches. Instead, respondents were asked if they were staying overnight in the county or were planning on driving home after their event. Just over half of respondents (50.4%) reported they were driving home after the event. The other half (49.6%) who reported they were staying overnight were then asked if they were staying with a friend or family member or were staying in a hotel.



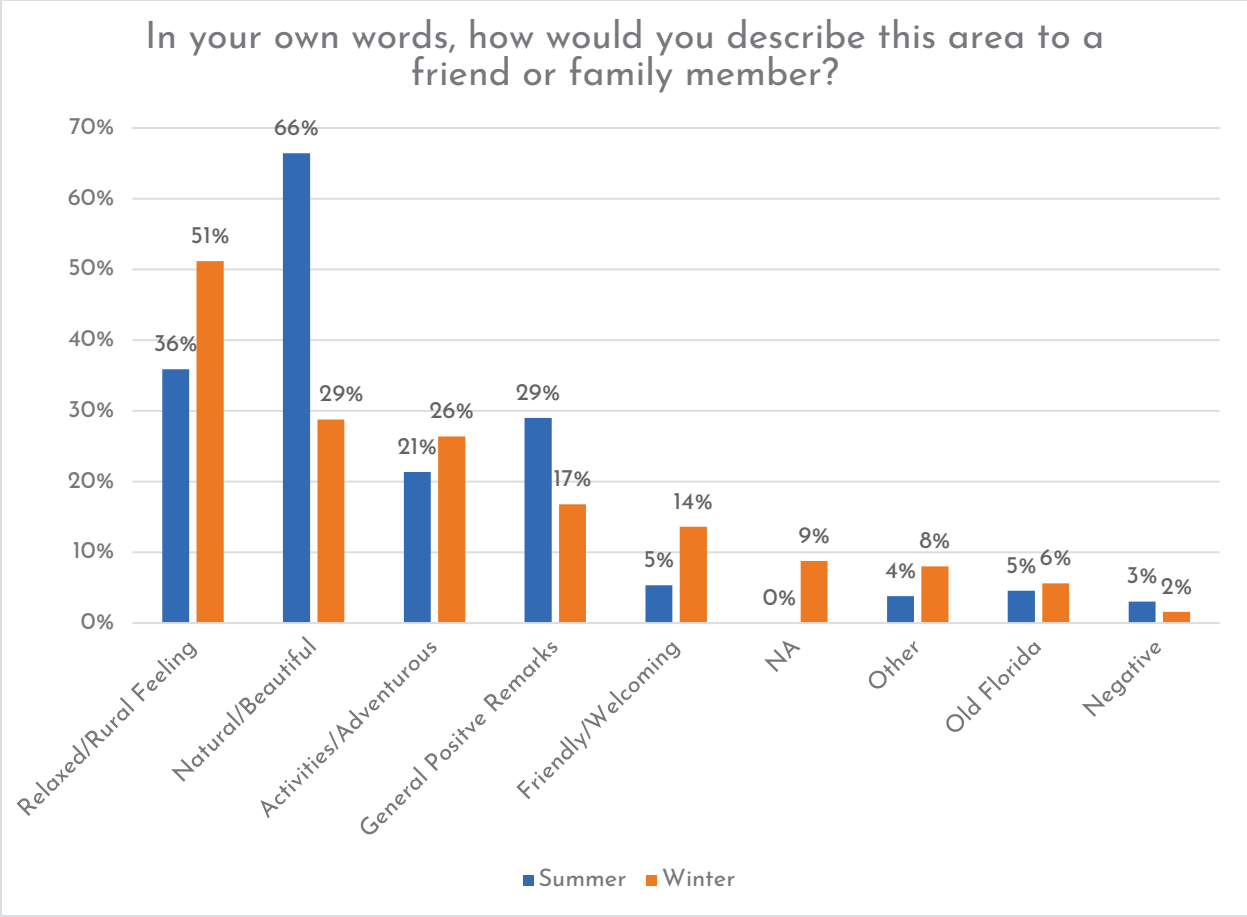
Of the 62 respondents who reported they were staying overnight, 47 provided a response to this question. Of those 47 respondents, 62% indicated they were camping in the county. Most of these responses came from attendees of the Foggy Longbottom Folk Festival or Croomfest. Regarding Foggy Longbottom, the event was held at a location that was part of a co-operation that allowed members to stay on site in an RV for free for the weekend. In regard to Croomfest, this was the first year that the event was held over several days. This led many attendees to also camp in the Withlacoochee State Park or a nearby campsite. However, some attendees to Croomfest who were staying overnight were lodging in a county hotel. Yet, as the data indicate, only about 1 in 10 overnight respondents were staying in a county hotel, so this was not a widely used option amongst our sample.



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?



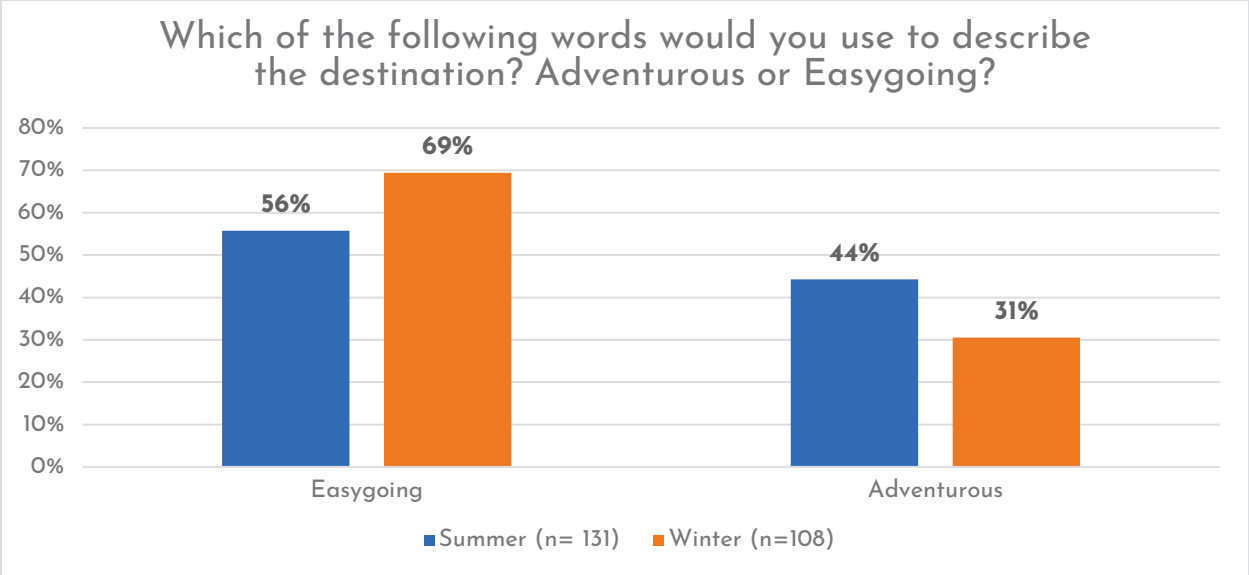
Respondents were then asked their level of satisfaction with their experiences in Hernando County. They were provided a 5-point scale with 1 being “very dissatisfied” and 5 being “very satisfied.” Responses for summer and winter dispatches were nearly identical with summer respondents more likely to indicate that they were “very satisfied” with their experiences in the county. Overall, 95% of summer respondents were satisfied, to some degree, with their experiences in the county. In contrast, 93% of winter respondents reported some degree of satisfaction with their experiences in the county. During the winter, 4% of respondents did not indicate their level of satisfaction whereas all summer respondents reported their level of satisfaction.



Next, respondents were asked an unaided question about how they would describe Hernando County to a friend or family member. Responses fell into 9 different categories: 1) Relaxed/Rural feeling, 2) Natural/Beautiful, 3) Activities/Adventurous, 4) General positive remarks, 5) Friendly/Welcoming, 6) Old Florida, 7) negative responses, 8) Other, and 9) NA/Did not answer.

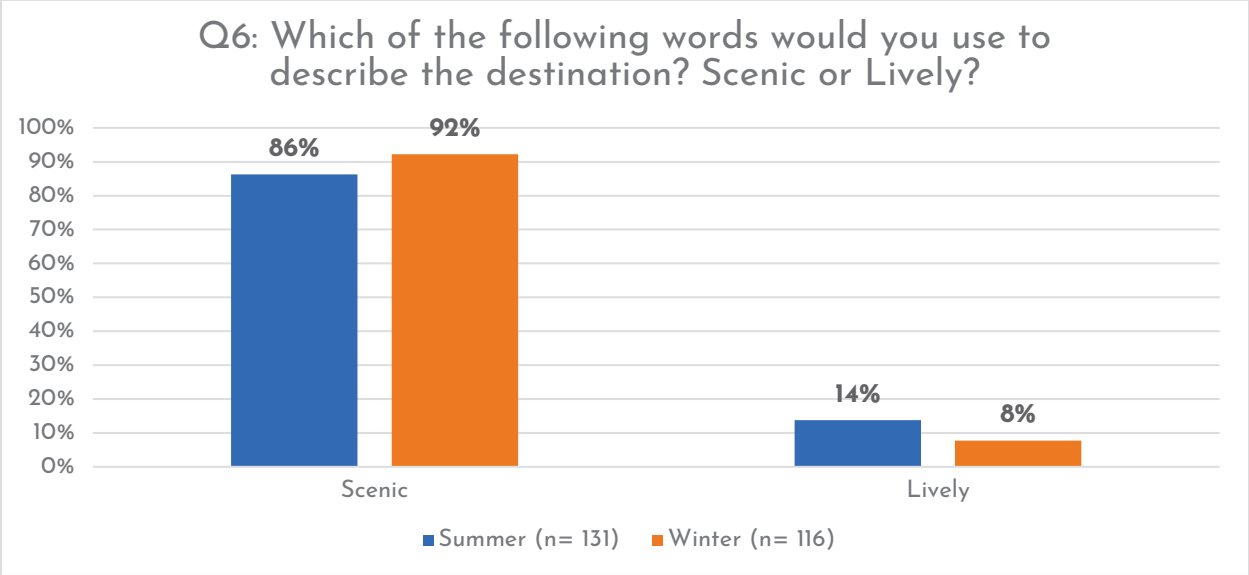
Respondents in the summer were significantly more likely to express sentiments about the nature and beauty of the county whereas respondents in the winter expressed more sentiments about the relaxed and rural feel of Hernando County. Respondents expressed that Hernando County represented 'Old Florida' at similar levels in both the summer and winter. Negative responses were low in both the summer and winter. Levels of negative responses were also nearly identical between summer and winter. This indicates that those visiting the county are very satisfied with their experiences in the county with only a few exceptions. In addition, the time of year shows some effect on how visitors describe the county. Summer visitors clearly reference the natural aspects of the county more. This makes sense given the locations of interviews and the draws to the county during the summer. Winter visitors expressed sentiments about the rural and relaxed feeling of the county. This may also be influenced by the location of the interviews. Yet, this also could be viewed as a representation of why respondents chose to visit the county. At Croomfest, for example, several interviewees referred to the activities and the feelings of adventure. However, they also expressed that the activity was something they do to relax and get out of a city environment. These anecdotal accounts help elucidate some of the differences seen between summer and winter descriptions of the county.

At the end of the survey, respondents were asked a series of three questions that made them describe the area one way. These three words associations tested different perspectives of how visitors may view the county.

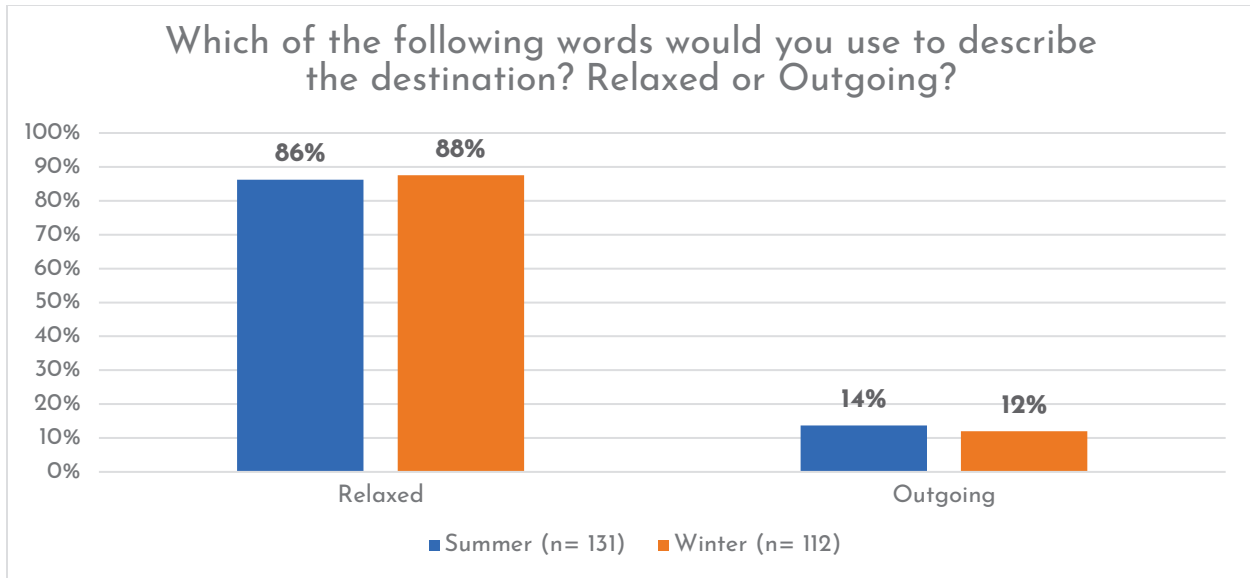


The first sub-question asked respondents if the destination was more “adventurous” or more “easygoing.” Winter respondents were more likely to describe the destination as “easygoing.” Conversely, summer respondents were more likely to describe their destination as “adventurous.” This may indicate a difference in seasonality in the county, as people may view the county as more of an escape.

Unlike the first word association sub-question, respondents were very clear on their view of the county and the destination in the second and third sub-questions.



The second word association questioned respondents if they felt the destination was more “scenic” or “lively.” A vast majority of both summer (86%) and winter (92%) respondents described their destination as more “scenic” than “lively.” Only 14% of summer respondents and 8% of winter respondents stated the destination was more “lively.” This provides further evidence that out-of-market visitors clearly think about the natural aspects of the county when visiting events and attractions hosted in Hernando County.



Finally, the third word association sub-question probed whether respondents viewed their destination in Hernando County as “relaxed” or “outgoing.” Respondents in both the summer (86%) and winter (88%) provided nearly identical levels of response that they viewed their destination as more “relaxed.” A little more than 10% of both the summer (14%) and winter (12%) sample believed the destination was more “outgoing.”

### Concluding Thoughts

In conclusion, visitors to Hernando County during the summer and winter mostly came from other parts of Florida. While a majority of these visitors came from surrounding counties, visitors from several counties across the state were interviewed during this process. This shows that Hernando County has a good reputation across the state that draws visitors in from all parts of Florida.

Visitors from across the United States also came to visit Hernando County. These out-of-state respondents were not only at Weeki Wachee, one of the most recognizable parts of the county. Rather, they attended various events and festivals held in the county. During the summer, more states were represented. This was not surprising, however, given the reputation that outdoor activities have in Florida and travel patterns for most people in the United States. However, there was a good representation of out-of-state visitors during the winter. These findings provide further evidence that the Midwest and Northeast draw in visitors year-round to Hernando County.

COVID-19 had little effect on travel to the county for summer visitors. In addition, about half those that did travel to the county in the winter stayed overnight, but most opted to camp or stay with friends and family. This means that while people may stay for extended periods of time in the county, these groups largely are not staying in hotels located in the county. Some visitors stayed in other counties and made the drive up to Hernando County specifically for their event or festival.

A majority of visitors interviewed during both time periods had visited the counties 3 times or more over the last 5 years. Likewise, satisfaction levels were high for both summer and winter visitors. More than 9 in 10 respondents reported some level of satisfaction with their experiences in the county. These figures show that visitors to Hernando County are quite satisfied with their experiences in the county and make it a point to come back and experience events and attractions offered in the county.

When respondents were asked to describe the county, their responses fell into similar categories, regardless of time period. The time period, however, may have impacted the frequency of certain responses. Summer visitors were much more aware of the natural aspects of the county. Winter visitors focused more on the relaxed feeling and rural setting of the county.

Finally, respondents were somewhat mixed on whether the county was more "adventurous" or "easygoing." Yet, these same people were clear about their feelings that their destinations were more "scenic" and "relaxed" compared to "lively" and "outgoing," respectively.

## Concluding Thoughts

The findings from the various research methods revealed seasonality to tourism, the perception of tourism in Hernando County, and its competitive edge in the market.

First, there are notable seasonal trends in some of the data methods. TDT data indicates seasonality in Hernando County's tourism. Hernando County appears to see the most visitors during the late summer months and throughout the winter months. This helps show the need to drive tourism, especially in off-peak seasons. This may help alleviate issues mentioned about the crowdedness of the Weeki Wachee River at various times and drive new groups to the area. Traffic to [floridasadventurecoast.com](http://floridasadventurecoast.com) also indicates seasonality in various ways. First, traffic to the site is not steadily growing, instead changing based on the time of year. This is further seen in the top pages over the course of 2022. Views for scalloping and fishing peaked during the summer while views on the attractions page saw peaks in the winter.

Second, both stakeholders and visitors to the county expressed similar sentiments that Hernando County has a more laid-back nature to its amenities and attractions. Stakeholders were clear that they rarely use the "Florida's Adventure Coast" terminology when referring to the area and visitors during dispatch interviews perceived the county as more easygoing, scenic, and relaxed. However, some data indicate a familiarity with the brand. In the brand perception panel, 43% of respondents were familiar with "Florida's Adventure Coast." This is a positive sign about awareness of the brand, but this does not indicate the perception of the area as adventurous itself. Furthermore, during the dispatch interview process, several people who were torn on whether the county was more "easygoing" or "adventurous" mentioned that the activity itself may be adventurous, but they used their activity as a form of escapism and a way to relax.

Lastly, the data reveals some of the strengths of the county, interest in attractions, and challenges to tourism. Based on data provided by STR, Hernando County's tourism industry saw a similar decline following the COVID-19 pandemic and a subsequent rebound as many of its competitor counties. However, the pattern of recovery differed depending on the metric. For the average daily rate, Hernando County was similar to Lake and Pasco counties and lower than Citrus and Charlotte. However, it had a higher ADR than Columbia County. For occupancy percentage, Hernando was similar to Charlotte and better than Citrus and Columbia but lagged behind Pasco and Lake. Lastly, revenue per available room was similar to Citrus and Lake and better than Columbia, but worse than Pasco and Charlotte. These data reveal that Hernando remains competitive but needs to continue to improve these to remain a good alternative to these other, rural counties. Moreover, data throughout 2022 will help to further evaluate these trends and see how competitive county tourism remained through 2022.

Stakeholders and visitors were clear that the natural aspects of the county, such as the various state parks and wildlife, were the greatest strength for tourism. However, a lack of dining and lodging options coupled with limited attractions may deter longer stays in the county or result in people staying in other parts of the region and only spending a short amount of time in Hernando County. While Hernando County has strong natural attractions, an analysis of competitor counties reveals that Citrus County boasts all the same attractions. The geographic closeness of the county makes it a direct competitor for the same tourists. Hernando County should still boast about the natural elements, as indicated by stakeholders and visitors, but must also find other markets to outperform them. One potential market is golf. A quarter of panel respondents expressed some level of interest in golfing in Central Florida. Hernando County is home to 16 different golf courses, one of which was ranked as a top golf course in the state of Florida. Citrus County, on the other hand, had fewer golf courses and none were ranked. This is one potential way to stand out from Citrus County and drive tourism to other parts of Hernando County. Though other counties across the state most some of the same amenities and attractions as Hernando County, only Citrus County advertises the exact same opportunities. It will be imperative to determine where Hernando County can stand out from Citrus County to help further tourism and development.

## Next Steps

### Stakeholder Workshop

On February 28, a stakeholder workshop for key stakeholders in Hernando County tourism was held at Florida's Adventure Coast's building. The meeting took place after regular business hours to encourage participation. During this meeting, some of the results of this research were presented followed by several different workshop activities to gather more insights from stakeholders about tourism in Hernando County. Insights gathered from this workshop will be incorporated into the 5-year strategic plan for the organization.

### Strategic Planning Workshop

On March 16, an all-day strategic planning workshop will take place in Hernando County with members of Hernando County's tourism office. This workshop is an opportunity to present the results of this research and have discussions with those who work each day to maintain and improve tourism in Hernando County.

Following both workshops, feedback will be synthesized along with the research findings into a 5-year strategic plan for the organization.

### Feedback and Revisions

Feedback provided from this foundational summary will be incorporated into the 5-year strategic plan, as well as this document prior to the project's completion. Revisions to this document and drafts of the strategic plan will also be made before the delivery of the final strategic planning document.

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