An analysis of Volusia County tourism marketing

Presented to the Volusia County Council by Strategic Advisory Group, Duluth, Georgia
Daniel Fenton, Lead Consultant
January 2013

Dan Fenton Presented At 1/28/2013 tourism study Workshop at Ocean Center
Current State of the Industry

Occupancy trends

- Occupancy not trending upward
Nearly 150 participants

• County Council
• City leadership
• County administration
• Tourism board members
• Industry stakeholders
• Tourism organizations
• Key partners
  ▪ Chambers of commerce
  ▪ Hotel motel associations
• Community Leaders
• Economic Development leaders
Common themes

• Tourism is critical in creating jobs and economic vitality
• Passion
  ▪ Interest in involvement
• Centralized marketing – concerns
  ▪ Resources potentially will be redistributed
• Stakeholder communication important
  ▪ Felt uninformed
• Condition of the tourism product
  ▪ Deteriorating
  ▪ Lack of investment
• Clarity of target customer
  ▪ Lack of understanding
  ▪ Concern over current targets
Coordination and Leverage

• Lack or coordination – leverage
  ▪ City Leadership
  ▪ Chambers of Commerce
  ▪ Arts Community

• Opportunities to maximize collective resources

Examples
  ▪ Independent event calendars
  ▪ Independent hotel reservation systems
  ▪ Independent tourism promotion campaigns
  ▪ Support for tourism product development initiatives
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<th>SWOT</th>
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<td><strong>Strengths</strong></td>
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<td>The beaches</td>
<td>Community Interest</td>
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<td>Tourism’s positioning – lead industry</td>
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<td>Interested, engaged county leadership</td>
<td>New leadership: Daytona Beach, SVAA</td>
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<td>Successful events</td>
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<td><strong>Weaknesses</strong></td>
<td>Marketing efforts need focus</td>
<td>Lack of research</td>
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<td>Economic development efforts not focused on tourism</td>
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<td>Declining tourism product</td>
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<td><strong>Opportunities</strong></td>
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<td>Sell a larger experience than only the beach</td>
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Community Interest
Tourism’s positioning – lead industry
Multiple Volusia experiences
  • Eco tourism
  • Fishing
  • Boating
  • Cycling
  • Birding
Interested, engaged County leadership
New leadership: Daytona Beach, SVAA
Interested partners: Speedway, Econ Dev.
History
Daytona 500
  • Most watched auto race in the United States - top 10 U.S. sporting event every year
  • Forbes’ fourth most valuable brand
Successful events
Value Destination
Weaknesses

Marketing efforts need focus
Lack of research
Marketing decisions opinion, not research based
Lack of functional support for smaller authorities
Lack of leverage – collaboration w/ partners
  • Chambers
  • Cities
  • Speedway
Economic development efforts not focused on tourism
Underperforming, poorly functioning group sales effort
Underperforming sports sales effort
Declining tourism product
Opportunities

Focused marketing efforts with measurable results
- Sell a larger experience than only the beach
- Different broader county experiences
- Create targeted marketing
- Enhance visitor experience – smaller enhancements

Larger capital investment plan
- Fold tourism into larger economic development efforts
- CEO Alliance, Team Volusia, County Econ Dev.

Maximizing sporting opportunities
- New countywide focus on attracting sporting events

Small wonders, streetscape, beach vendors
- Improve short term opportunities

Seamless new approach to group sales
Centralize – leverage the brand
New partner involvement – collaboration
- Cities
- Chambers
- Arts community
Divided polarized industry – community
Disengaged industry stakeholders
Group sales effort – non-collaborative
Governance model
Tourism’s positioning in economic development – attracting development
Product deterioration
No viable capital plan in cities or county
Number one industry – not treated as such
Principle role of governance

• *The principal role of the authority board members, as representatives of tourism stakeholders and the Volusia County Council, is to oversee the function of the authority and ensure that it operates in the best interests of all stakeholders.*
Governance – It starts at the top

• Tourism boards are fiduciary and provide direct supervisions of the Executive Directors
• The boards approve the overall marketing plan for the authorities prior to County Council
• The effectiveness of the three authorities is strongly influenced by the effectiveness of the boards
• Members need to bring skill sets and experience that will support the success of the tourism authorities
Industry driven nomination

**CURRENT PROCESS:** Community members that are interested in serving will apply and be nominated by a particular County Council member.

**PROPOSED PROCESS:** Nominating committees vet applicants to present to the County Council.

*Districts 1 – 5, an “at-large” member and the County Chair*
Governance – Advantages to Industry Supported Process

• Responsibility of the industry to recruit possible candidates
• Opportunity to look at specific skill sets
  ▪ Marketing
  ▪ Finance
  ▪ Communications
• Ensure understanding of accountability
• Council retains final authority – welcomes input
Product Development

• Vital aspect of future growth
• New broad-based approach is needed
  ▪ Stimulate private investment
• SAG met with CEO alliance, Team Volusia, and County Economic Development
• SAG met with Chambers of Commerce
• Current Economic Development focus – other industries
• Create a structure that focuses economic development resources and talent on tourism
Tourism Development Task Force

- Volusia County Tourism – Product Development Task Force
- Need community/business leadership
- Tourism needs to be a primary economic development focus
- Not currently cited as key industry
Task Force – annual planning

• Meets quarterly
• Develops target industries for private investment
  ▪ Entertainment
  ▪ Attractions
  ▪ Hotels
  ▪ Retail
• Tourism authorities provide market research for support
• Reports on progress to tourism industry and key stakeholder
Research Driven

• Broad-based interest in understanding the “target customer”
  ▪ Opinions vary on the subject
  ▪ SAG reviewed past and current media plans
• Consensus on the need to take a closer look
• PRIZM study approved
• Thanks to everyone involved
• Strong sampling of current visitors
PRIZM

• Nationally Syndicated
  ▪ GEO codes
  ▪ Studies behavior
  ▪ Benefit of extensive annual research

• Created Sample from 70,000 records
PRIZM overall segments

PRIZM Social Summary Groups - Visitors
(n=18,807)

- Landed Gentry: 16%
- Country Comfort: 13%
- City Centers: 10%
- The Affluentials: 10%
- Middle America: 9%
- Second City Society: 9%
Top Segments

• Landed Gentry – Southeast Volusia
• Country Comfort – Halifax/Daytona
• West Volusia data not yet available
  ▪ Offer to run analysis in future
• Top segments were unique
  ▪ Supports specific focus for future marketing
• Brief overview – importance of targeting
  ▪ More data in full report
  ▪ Authorities to study report further
    • More conclusions and strategies
Characteristics

**Landed Gentry**
- Boomer generation
- College Degrees
- Have and use technology
- Boating
- Health and Exercise
- Median Household Income – $82,000

**Country Comfort**
- Upper middle class home owners
- 25 to 54
- Comfortable lifestyles
- Woodworking – crafts
- Bar hopping
- Playing golf
- Median Household Income – $56,000
Landed Gentry – Information

- Satellite Radio Subscribers
- Boating Magazines
- Audubon Magazine
- Runners World
- ABC This Week
- AARP
- Airline Magazines
- Kiplinger’s Personal Finance
- Parenting Magazines
Country Comfort – Information

- American Hunter
- Field and Stream/Bassmaster
- Fraternal Magazines
- Four Wheeler Magazine
- Parenting Magazines
- Boating magazines
- Alternative Rock Radio
- Adults Standards Radio
- Classical Radio
Opportunity to refine targets

• The understanding and agreement on growth opportunities – in the near future
  ▪ Need to market for today

• Target marketing design to raise awareness
  ▪ With call to action

• Will indicate the level of interest for each experience offered
Visitor profile study

• SAG reviewed five years visitor profiles – Halifax Daytona
• Current research that is available
• Following is analysis over a five year period
Reasons visitors chose Daytona Beach
Household income demographics

Average Household Income

- 2005: $45,401
- 2006: $48,141
- 2007: $50,932
- 2008: $48,468
- 2009: $49,135
- 2010: $47,461
Online indicators

Use internet to plan trip?

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<tr>
<th>Year</th>
<th>Percentage</th>
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<tbody>
<tr>
<td>2005</td>
<td>17.0%</td>
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<td>21.9%</td>
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<tr>
<td>2007</td>
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<tr>
<td>2008</td>
<td>27.4%</td>
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<tr>
<td>2009</td>
<td>35.0%</td>
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<tr>
<td>2010</td>
<td>41.2%</td>
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Decision making and planning

How many weeks in advance make decision

- 2005: 3.5 weeks
- 2006: 3.8 weeks
- 2007: 4.6 weeks
- 2008: 5.5 weeks
- 2009: 5.7 weeks
- 2010: 5.6 weeks
Case Study

• Popular publication: Southern Living
  ▪ Average household income of readers: $73,485

• PRIZM Study and visitor profile indicated household income between $49,000 and $62,000

• Research creates opportunity to focus
Notable outcomes

- Daytona 500 visitors more affluent than Bike Week
  - Both contain segments that come year round
- Segments vary slightly by season
  - Landed Gentry and Country Comfort are consistent
- Additional New Smyrna research in report
  - Outcome of direct marketing project
Conclusion – research driven

• Recommendation
  ▪ Marketing plans must contain research that supports the overall direction
  ▪ Boards are now focused on how the proposed direction is consistent with research
    • Market to the segments with the highest propensity to visit
  ▪ Creates information that also supports the stakeholders in their efforts
    • Participating hotels will receive their data
Leisure Marketing – Shift Resources

• Opportunity for direct “one-to-one” marketing
• SAG has worked with the authorities on products
• Current Examples
The West Volusia section of the St. Johns River boasts some of the best fishing Florida has to offer. Largemouth black bass, warmouth, bluegill, specks, stripers and catfish abound. Not only is the fishing great here, but a day out on the soothing sun dappled waters of the majestic St. Johns will refresh your spirit!

**BASS FISHING at its BEST!**

Come to West Volusia County and experience the finest freshwater fishing on the St Johns River.

Our specially priced packages pair discounted accommodations with half or full day fishing trips. Boat rental specials are available at some properties.

Don't delay in booking your trip today.
Southeast Volusia – New Smyrna

• SVAA and SAG are finalizing a direct marketing/research project that will launch soon. Accommodators and Hotel/Bed and Breakfast have participated. A targeted/research based database of 20,000+ potential new visitors will be targeted.
Halifax/Daytona

The Daytona CVB recently used this direct marketing technology to gain an understanding of potential visitor’s interest. In the process of developing a highly targeted database.
New Focus – Direct Marketing

• Use research to pinpoint target
  ▪ Example – a few million of the top two segments reside with a 200 mile radius
  ▪ Use targeted lists – market experiences directly
    • Measureable
    • Requires state of the art fulfillment
    • Test and refine experiences
  ▪ Continue other marketing vehicles
    • More emphasis on direct one-to-one
    • Media decisions based on research
  ▪ County wide experiences
    • The visitor doesn’t care about borders
Shared Services

• SAG met with executive directors and staff
  ▪ Analyzed current structure
  ▪ Reviewed duties
• SAG worked on specific programs
  ▪ One-to-one marketing
  ▪ Understanding the need for support
• Evaluated breadth of responsibility
• Singular organization was reviewed
  ▪ Could the regional focus remain?
Shared Services cont.

• Opportunity to provide centralized support
  ▪ Maintain regional decision making
• The following areas present the opportunity:
  ▪ Online support – shared content
  ▪ Experience/Package Selling
  ▪ Creative Services
  ▪ Event database/calendar
  ▪ Social Media
  ▪ Research
  ▪ Finance and Administration
  ▪ Common Software Platform
  ▪ Reporting/Measurement
Online support

- Online support – shared content
  - Singular server houses all content
  - Creates opportunity to cross promote
  - Delivers consistency in quality and technology
  - Decisions on content used remains with the authorities
Experience / Package selling

• Fulfillment and ease of purchase is important
  ▪ Internet/direct marketing – important part of future

• Singular reservation/fulfillment platform

• Marketing and product development decisions remain with the authorities

• Promotes the opportunity to include county wide experiences
Creative Services – leverage media buy

• Opportunity to have access to quality designers
• Look and feel may be different
• Evaluate opportunities to save on media buy through joint purchasing
Activity event database/calendar

- Central database for entering events
- Can sort for web portals
- Encourages cross promotion
- Educates prospective visitor on the wide range of activities
Social Media

- Takes resources to maintain activity and grow engagement
  - Challenging to create new ongoing contact
- Share content on Facebook page
- Share social media staff
- Maintain unique messaging
Research

• Currently minimal data for West Volusia and Southeast Volusia

• Create an annual joint research plan
  ▪ Ability to refine future targets

• PRIZM study creates a baseline
  ▪ Demonstrated unique characteristics
Finance and Administration

• Centralized Accounting Office
  ▪ Create standard financial statements
  ▪ Give reports to respective boards
  ▪ Create a working relationship to county finance
  ▪ Ensure consistency in procurement practices
  ▪ Clear division of duties
  ▪ Executive directors have more time to focus on marketing
Common Software – Reporting

• Institute common tourism software for the three authorities

• Supports common reporting and provides support in database management, leisure marketing, web content, accurate stakeholder information

• Standardize reporting
Reporting and Measurement

• Common Metrics – examples
  ▪ Room nights generated
    • Leisure
    • Group
  ▪ Direct spending generated
  ▪ Track targeted brand awareness/marketing efforts
    • Conversion study – common methodology
  ▪ Overall economic impact
Sample Report

- Monthly Report will inform stakeholders on key metrics and performance
- Distribution to Elected Officials and stakeholders
- Designed to inform and demonstrate accountability
Improve results – maintain decision making

- Decisions remain with the authorities
- Increased marketing effectiveness
- Consistency in reporting and metrics
- Compliance in the admin/finance areas
- Implementation
  - Determine structure for support
The opportunity to transform
Group Sales and Marketing – Ocean Center

• Broad based interest in improving results – balance goals
  ▪ Financial performance
    • Revenue
    • Reduce need for subsidy
  ▪ Economic impact
    • Room nights
    • Direct Spending
  ▪ Impetus for constructing the Ocean Center
    • Economic Generator
    • Consider deficit in terms of investment
Functionality is most important

• SAG has recommended a series of functional improvements
  ▪ Focus on functionality
  ▪ Most effective structure
• Collective mission and universal goals
• Reported Consistently
The Balance

• Economic Impact
  ▪ Direct spending
    • Hotel rooms
    • Restaurants
    • Retail
    • Job creation
  ▪ Tax generation

• Ocean Center Revenue/Fiscal Results
  ▪ Rental revenue
  ▪ Food and beverage
  ▪ Other services
Collective mission – Universal goals

• Goals should be shared by everyone involved – examples:
  • Economic impact/direct spending
  • Room night generation
  • Ocean Center revenue
  • Attendee/client satisfaction
  • Ocean Center profitability
Prioritization of events – Booking policy

• Collaborative process – Prioritization
  ▪ “Highest and best use” determined
    • Citywide conventions
    • Consumer shows
    • Social events
  ▪ Recommend Prioritization Session/Committee

• Agreement on the overall strategy
  ▪ Booking Parameters determined
  ▪ Current Booking policy needs to be refined
    • Continued lack of understanding
Current deployment – overlap exists
• Currently the Group Sales Managers are on two independent teams with no shared goals
Future – Seamless team

• Important to have all sales managers focused on common goals
• Opportunity to have a common incentive plan
• Coordinated market deployment
• Accountability to achieve agreed upon team goals
Functionality Informs Structure

• Focus on implementing new functionality
• Designed to maximize and organize resources
• Ensure accountability
• Transparency
• Agreed Upon Priorities
Singular Marketing Plan

Outline

• Industry trends – economic indicators
• Research results – ongoing activity
• List of joint sales activities
  ▪ Trade shows
  ▪ Sales mission
  ▪ Familiarization (FAM) trips
• Joint advertising plan
• Targeted market segments
• Public relations strategies
• Stakeholder communication plan
  ▪ Joint reporting
  ▪ Audience
• Online strategy
• Joint goals
• Holistic group sales and marketing budget
Deployment Plan

• What group markets will create the highest return?
  • Religious
  • State association
  • National association
  • Sports
  • Competitive arts
  • Social, military, educational, religious and fraternal markets (SMERF)
  • Corporate
    ▪ Research based – conduct meeting planner survey
    ▪ Eliminate duplication
Maximizing Marketing Channels

- Public relations
- Advertising
- Singular database
- Online marketing – singular web portal
Advertising Example

• Ocean Center Marketing
  ▪ The opportunity for collaboration
Current websites

• Currently two meeting planner sites
• Opportunity to create a singular experience
Holistic Goal Setting – Collaborative

1. Market analysis – review research
2. Production history
3. Internal review

- Sales Manager involvement – initial goal setting
- First review – Ocean Center and CVB directors of sales
- Second review – Ocean Center Director and Daytona Beach CVB CEO

- Third Review – Tourism Development Committee
- Final review and approval – HAAA and County Council
- Sales Team confirmation
Sales Incentive

• Create a plan for all sales managers
  ▪ Reward outstanding performance
  ▪ Sample

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<th>Percentage incentive compensation</th>
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<td>100 percent</td>
<td>10 percent</td>
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<tr>
<td>105 percent</td>
<td>17.5 percent</td>
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<td>110 percent</td>
<td>25 percent</td>
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<tr>
<td>115 percent</td>
<td>32.5 percent</td>
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<tr>
<td>120 percent</td>
<td>40 percent</td>
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Sales Performance Plan

• The following is an overview of a recommended approach:
  ▪ Goals are determined by calendar year.
  ▪ Uses a nine-month performance monitoring period. The nine-month period is ongoing or a rolling period of time, using three-month periods or quarters.

• Minimum sales performance goal components:
  ▪ Minimum 85 percent conversion of targeted room nights in a rolling nine-month period.
  ▪ Minimum 85 percent achievement of Ocean Center revenue goals (revenue is defined as food and beverage, facilities use, ancillary services, etc.)

• Ensures consistent performance oversight
Highest and Best Use

• Consensus in discussions – Citywide Groups
• Definition
  ▪ Using a minimum of three Volusia County hotels
  ▪ A minimum of 1,000 rooms on the “peak” night (the largest need for hotel rooms on one night during the conference or convention)
  ▪ 5,000 room nights requested or blocked
  ▪ A range of attendees from 2,000 to 5,000
• May require flexibility to compete
Citywide Conventions – Future Bookings

- This chart demonstrates the opportunity to increase future citywide convention bookings
Future Production – Reporting

• This report creates a focus on future timeframes and important soft periods that need sales focus
• Information important in determining strategy for negotiations
Impact of Proposed Plan

• Consensus – impact of increased resources
  ▪ Three to five citywide groups annually
• Joint accountability
• Functionality is the key – informs structure
• Agreed upon balance of economic impact and fiscal results
• Maximization of collective resources
• Reporting results to all stakeholders
Industry Overview – Customer Focus

A joint “best practices” paper driven by the two national associations representing convention and visitors bureaus and convention centers has this statement in the introduction:

One underlying objective that cannot be overstated: provide the destination customer with a seamless positive experience from the onset of the sales cycle through move out.

• The industry has focused on the customer experience
• Currently the customer may meet two representatives
• Recommended collaboration between Convention Centers and CVB’s
• Maximization of collective resources with a common set of goals
Importance of Events

• Important overall tourism strategy
• Create metrics for review
  – Economic impact – direct spending
  – Hotel room night generation
  – Value in overall marketing as a visitor destination
  – Attendees are a valuable year round market
  – Quality of life for residents
  – Security or safety needs
  – Event management structure
  – Cost associated with event support
• Event strategy becomes part of the annual planning
  – Funding ties to delivery of metrics
Sports Commission

• SAG spoke with community stakeholders
  ▪ Recommend shifting resources
  ▪ Create Sports Commission focused on Volusia County
  ▪ Volusia county not getting its share of sporting
  ▪ Unify all interested organizations
The Brand Dilemma

The Daytona name has been used on a wide variety of products...
Brand Equity – Daytona

How do we evolve and capitalize on the Daytona brand?

- Brand awareness
- Brand attributes & associations
- Perceived quality
- Brand loyalty
Funding

• Reviewed neighboring counties and similar destinations
  • Ft. Myers
  • Key West
  • Virginia Beach
  • Sarasota
  • St. Petersburg
  • Tampa

• Looked at many comparisons to evaluate funding levels
Marketing budget per overnight visitor

- Sarasota: $6
- St. Petersburg: $5
- Ft. Myers: $4
- Key West: $3
- Tampa: $2
- Myrtle Beach: $2
- Virginia Beach: $1
- Volusia: $0
Funding – opportunity

• Opportunity to explore options
  ▪ Industry Supported
    • More inclined to support with clear accountability
      ▪ Business Improvement Districts
  ▪ Redistribution of Bed Tax dollars
Implementation

• Short term Action – within 90 days
  ▪ Institute annual plan requirements
    • Research driven plan
    • Metrics and measurement
    • Collaboration and leverage
    • Event plan
  ▪ Creation of Tourism Product Development Task Force
  ▪ Begin implementation of group sales functionality
Summary of Recommendations (cont.)

• Medium Term – 3 to 6 months
  ▪ Implementation of new governance/nomination process
  ▪ Implementation of the holistic group sales and marketing plan
  ▪ Begin implementation of the shared service model
  ▪ Implementation of the stakeholder communications plan
  ▪ Development of initial plan by Tourism Product Development Task Force
  ▪ Report on new marketing direction – advertising authorities
  ▪ Begin Development of the Volusia County Sports Commission
Summary of Recommendations (cont.)

• Long term – 1 to 2 years
  ▪ Evaluate new funding possibilities
  ▪ Conduct brand evaluation with recommendations
Conclusion – leadership and focused implementation

• An opportunity to support the transformation of tourism in Volusia County
• Recommendations are achievable
  ▪ with leadership
• Elected officials, authority boards, industry leaders, community leaders, partner organizations, and tourism staffs have an opportunity to lead the industry in a new direction
  ▪ Not let “how” get in the way
• Implementation needs specific focus and oversight
Inaction

• Results will be similar
• Competitive position will deteriorate
• Community interest and involvement will wane further
• Economy will suffer
Action – Leadership

• The numbers will increase
• Information and engagement will increase quickly
• Accountability will be clear
• Investment will come
• The industry will transform
Questions/ Comments

• Draft Report
• Receive input
• Finalize Recommendations
Thank You

Strategic Advisory Group

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