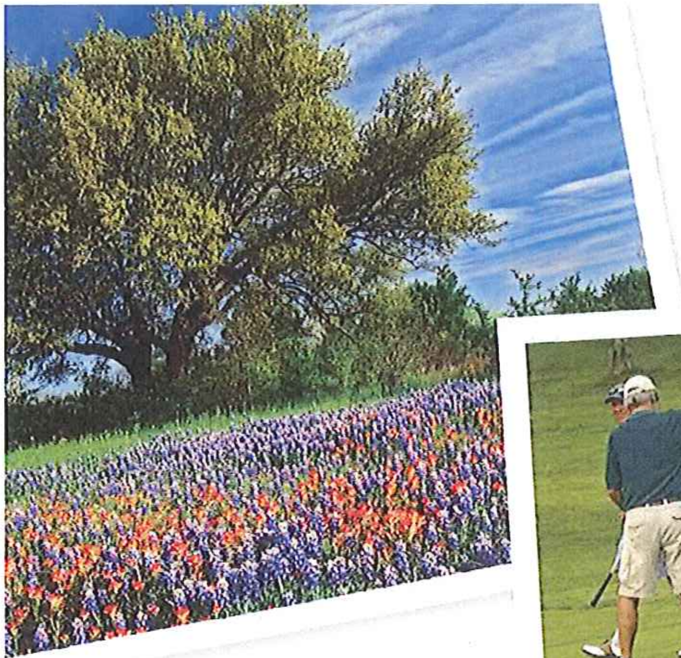

business or pleasure } BOTH

2011 Sumter County

Tourism Plan

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05/06/2011

TOURISM PLANNING ANALYSIS AND REPORT

Visit Sumter

Sumter County is relatively unknown as a tourist destination. It has good geographical positioning and some attractive visitor facilities and events, but it is in a formative stage of developing its tourism potential.

Sumter County is a beautiful natural landscape of lakes, rivers, forests, parks, farms and preserves close to the urban corridor of interstate 75, US 301 and the Florida Turnpike with only one hour drives from either the Metro Orlando or the Metro Tampa-St. Petersburg-Clearwater areas. This significant geographic location coupled with its features and activities offers a market opportunity to draw visitors from the regional area. The County does have a strong international market attraction in The Villages and some national identity of pride and remembrance in The Florida National Cemetery, but the immediate best opportunity to increase visitors and overnight lodging will be primarily in developing all aspects of the regional marketplace.

"Travel, which was once neither a necessity or an adventure, has become very largely a commodity" -- Jan Moris

Sumter County has four major product categories to draw visitors from the regional market:

A rich natural environment with close proximity to major urban areas: From the mysteries of Green Swamp to the big bass of Lake Panasoffkee to long winding scenic roads, Sumter County offers all the potential ecotourism possibilities. Fishing, kayaking and canoeing, biking, walking/hiking, camping, bird watching, sightseeing, hunting and other outdoor activities are all within one hour drives from major State population centers such as Tampa/St. Petersburg/Clearwater and Orlando.

A special place in American history: Important facilities/events such as the Florida National Cemetery and Dade Battlefield Park offer some rich historical/cultural visitor attractions.

An active collection of working farms and cattle ranches: Sumter County offers urban visitors direct connections to "down home Florida" agricultural experiences and a wide variety of homegrown and home raised products... come and taste Sumter's finest beef and Sumter's sweetest produce.

A group of unique and interesting cities: Experience down-home Webster, site of one of the oldest cattle auctions and largest continuous flea markets in the country, or The Villages, one of the most successful planned retirement community in the United States filled with premier golf courses, outstanding daily events, and diverse retail and restaurant offerings. The Villages already has wide and effective marketing outreach. Any opportunities to partner with The Villages (in careful coordination with their corporate objectives) can be a great benefit in building tourism. Likewise, identifying and promoting events and facilities in the other unique cities can significantly increase "day trippers" and "overnight stay" visitors.

Findings:

Tourism is currently in a formative stage in the Sumter County economy. It has great visitor potential, but requires a strong and coordinated plan of action. Short-term progressive actions of building a strong website; launching an interactive calendar of events; promoting current events and facilities, partnering among the tourist stakeholders and encouraging/assisting in the construction of new events combine to form a solid basic strategy.

Tourism can play a much stronger role in the Sumter County economy. In the highly competitive market of Florida, tourism success results through active promotion, strong events and quality supportive facilities.

Good initial success can occur as outlined above, but mid-term and long-range success will require thoughtful and continual improvement of both programs and facilities. For example, Lake Panasoffkee is a tremendous fishing resource with active and effective lodges and guides, but needs better public access, signage and facilities to grow and sustain fishing. Likewise, research demonstrates a growing and sophisticated interest in purchasing natural produce and its products, but as of today, produce growers of Sumter County don't have a "canning kitchen" that a cooperative group could use to increase their product sales and give visitors another reason to stop. Thoughtful utilization of "bed tax income" could present partial funding solutions for some of the long-term capital requirements of tourism assets.

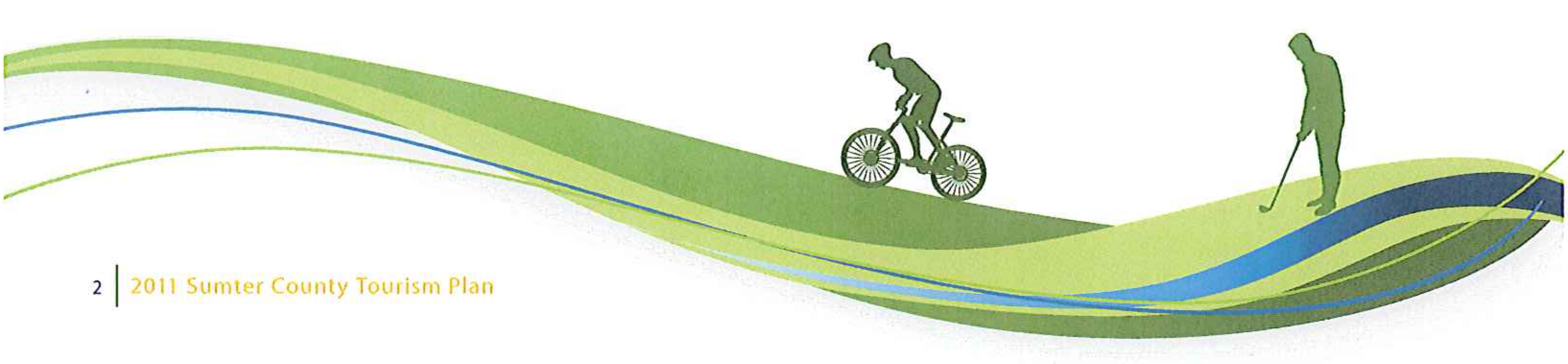
Tourism strategy should first focus on existing events and facilities. The Villages has an international identity and draws visitors from all over the world. Its wide variety of excellent events and superbly maintained facilities draw both in-County and regional visitors for both day and overnight visits. The future opening of their third town center will only increase this visitor appeal. To build on the appeal and identity of this "playground for adults", the tourism strategy should focus on co-promoting events that fit their corporate goals and developing collateral events and facilities in other parts of the County. For example, the Sumter County Fair has a variety of events but could attract higher attendance with a strong advertising and promotion partner.

Increased collateral events not only improve the overall appeal of the County as a tourism destination, but will also slowly build an increase in overnight stays. The sequence of action is to increase the total number of visitors. Initially this will increase bed sales by a small margin but may provide exposure to subsequent visits allowing consideration for hotel construction.

Tourism grows by building on your history, anticipating the future and connecting your partners. Residents that choose to live in Sumter County strongly respect nature and love their agrarian neighbors. Visitors will come for the same experiences.

Ecotourism and agritourism are two of the fastest-growing segments of the Florida marketplace. Sumter County has a unique opportunity to blend these segments with other facilities and attractions to build a successful regional visitor program. A future anecdotal story would have a family visiting Sumter County from Tampa to attend a special event at the County Fairgrounds coupled with an equestrian show in Bushnell. They would then travel a scenic byway to The Villages area where they would obtain lodging for the night, shop at local retailers, enjoy the free entertainment of a town square and select dinner from a wide variety of restaurants. This now happens incidentally, but a combined and coordinated effort (we recommend a marketing technique labeled "JoyPacs" which combine admission, lodging and dining discounts) will establish a pattern of visitation. New proposed major events such as the Chamber of Commerce's "Beef and Boogie" enhance this approach and also highlight a substantial business component of the area.

Every stakeholder we talked to throughout Sumter County is ready to work jointly and cooperatively together to build and communicate this attractive "JoyPac" approach. They believe that the history, culture, festivals, special events and recreational facilities of the area, highlighted by ecotourism and agritourism programs, enhance the unique draw of The Villages and combine as a successful formula for tourism growth.



STRATEGIC PLAN FOR TOURISM

"The secret is not in planning the Festival, it is getting people to come" - Frederick Nietzsche

Tourism strategic planning evolves from two distinct methods. One method considers the physical, social, environmental, and economic elements of the community. Therefore, the interplay of transportation, recreation, land-use and comprehensive plan development all contribute to a tourism strategy. The second method considers tourism as a business in which the community plans the feasibility, markets product offerings, and promotes strategic options to bring visitors to the area. This 2011 Sumter County Tourism Plan embraces both methods.

- **Define goals and objectives**
- **Review the current situation**
- **Identify market targets**
- **Establish high priority options**
- **Recommend 2011 budget and implementation schedule**
- **Monitor/evaluation/feedback program**

Define Goals and Objectives

Who are we?

Recently, the Sumter County Chamber of Commerce held its annual member dinner. The prime entertainer for the evening was a comedian from the Leesburg area who spent several moments of his opening routine joking how difficult it was for him to travel to the dinner that night "because he had no idea where Sumter County was located." These supposedly humorous remarks highlight the key challenge that Sumter County faces in becoming an improved tourist destination: we must communicate to local and state members of the tourist industry, connect to local residents/businesses and outreach to potential visitors.

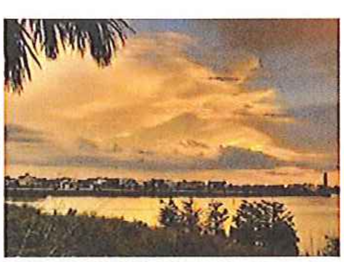
Our primary goal is to increase the number of visitors and the number of nights they spend in Sumter County. This can be accomplished by focusing on increasing visits, which attract tourism related businesses such as lodging, restaurants, recreational facilities and special festival events.

Review the Current Situation

Where are we?

Sumter County is an unlikely but dynamic combination. It is beautiful landscape with lakes, rivers, numerous parks and preserves bisected by winding tree shaded roads traversing farm and cattle raising properties. It is also a unique collection of communities including The Villages, Wildwood, Bushnell, Coleman, Webster and Center Hill. The communities are both diverse and charming, from the quaint historic County Seat of Bushnell to the large micro-urban success of the planned retirement community of The Villages.

Sumter County is uniquely positioned at the major intersection of road and rail in North Central Florida. Its long frontage on Interstate 75, US 301 and the Florida Turnpike bring thousands of potential visitors passing through each day. Sumter County is equidistant from Orlando and Tampa, about one hour's drive from each. Highway access within Sumter County is convenient and direct. Since more than 36% of all in-state Florida pleasure trips aim for the theme park mecca of Orlando, with Tampa/St. Petersburg drawing another 13% and the City of Jacksonville an additional 8%, Sumter County is geographically well-positioned in



the heart of Florida tourism. According to statistics from Visit Florida in their current Destination Marketing Plan, Sumter County has the target market of approximately 2 million visitors annually. Being well located is certainly a starting point of advantage, but the fierce competition of Orlando's theme parks and Tampa Bay's beaches mean Sumter County must create a special and unique appeal in the most competitive tourism market in the country.

The tourism industry everywhere feels the negative impacts of unemployment, lower home values and business uncertainty. Visit Florida, the state's tourism marketing arm, reports that Floridians took 1 million fewer in-state pleasure trips during 2009 – 10, representing 1.8% decline. Even with the difficult economy, out-of-state visitors show an increase of .06% during the last quarter. This small improvement is encouraging especially considering the difficulties of the down economy coupled with the negative publicity of the Gulf oil spill in 2010. More encouragingly, Visit Florida further reports that over 20% of all in-state travelers originate from the West Coast region, including Tampa – St. Petersburg – Clearwater and Sarasota, 22% from South Florida, 10% Jacksonville and another 8% from Orlando. This positive data, coupled with the difficulty in the economy means that short-term (one day, overnight, weekend) pleasure trips to Sumter County should be our primary target market. Sumter County should shape its tourism target toward the regional market for instate travelers while still recognizing the potential of drawing some out-of-state travelers with the major national/international identity of The Villages coupled with major interstate road systems that bring out-of-state travelers past our front door.

Identify The Target Markets

E5solutions devoted more than ten months to listening, researching and analyzing data and input in preparing the 2010 Strategic Economic Development Plan which was unanimously adopted by the Sumter County Board of County Commissioners. This plan involved wide input from individuals, businesses, cities, civic and business organizations including more than 40 personalized presentations and a broad gauge survey. Information gathered for the important strategic economic plan is the initial foundation for the analysis and recommendations contained in this Sumter Strategic Plan for Tourism.

To further gain and refine information, input from members of the Tourist Development Council, members of the Board of County Commissioners, open and individual meetings with visitor industry representatives and an e-mail survey produced new significant insights.

The stakeholders meeting of November 8 produced a list of the core assets for attracting tourists including: the natural setting of the County seasoned by a diverse and unique group of cities; the State fish hatchery; the Florida National Cemetery; birding and biking trails; agritourism events and facilities; ecotourism events and facilities; equestrian events and facilities; Dade Battlefield Park; farms and ranches; the Green Swamp and other preserves; The Villages; the County Fairgrounds and the new potential of medical tourism (these priorities of core assets parallel the primary activities noted in Visit Florida's visitor study. see appendix a). The same group identified current liabilities including lack of promotion, lack of focus, lack of in-County signage, lack of billboards on I-75, lack of accommodations, and a lack of unity across the County. One universally agreed action was the need for a master calendar of tourism related events.

Summary of this input and analysis strongly suggests Sumter County should focus on a regional market attracting day trips from up to 150 mile radius, pass-through travelers, overnight trips of one or two nights (most likely weekends) and extended overnight vacation trips. This conclusion is bolstered by research of Visit Florida demonstrating 83% of in-state travelers have lengths of stay between one and three nights.

What, or who, is an in-state tourist? Florida in-state Tourists are as diverse as our population in general. No single message reaches or attracts the attention of every potential visitor to Sumter County. According to research reported by Visit Florida, the State's official tourism agency, the average Florida in-state tourist visitor is a couple (2.7 persons); they will spend two nights (2.6 nights) in a hotel or bed & breakfast; they are between 18 and 64 years of age (avg. 45 years); they have a household income of \$85,640; they will spend \$102 per day per person; came primarily to shop, go to a theme park and sight-see; and came from an regional area from Sarasota in the South to Jacksonville in the North. Our marketing message needs to segment into niche promotions that interest smaller, targeted demographic groups with varied interests and expectations such as freshwater fishing enthusiasts, families searching for equestrian competitions or history buffs of the Seminole Indian wars.

The first step in increasing tourism is to target the day visitor. As the number and frequency of day visitors increases, the need and demand for overnight lodging will slowly grow.

Strengths of the Sumter County Tourism Market

1) Beautiful natural environment with lakes, rivers, forests, national preserves, State, County and local parks connected by long winding roads through scenic farms and ranches. This natural and agrarian landscape presents many opportunities for ecotourism and agritourism events and activities.

Ecotourism: data indicators

Ecotourism is on a steady and rapid growth pattern. According to the International Ecotourism Society Study of 2006, the rate of ecotourism is growing three times faster than general tourism and enjoys a 34% annual increase in visit related expenditures since the 1990s. The mere act of visiting a park even has strong economic impact. The 2009 Nature Conservancy report determined that "for every thousand people attending a State Park, the total direct economic impact on the local economy is more than \$43,400."

All the subsets of ecotourism that fit Sumter County have high potential value. In the Study (I 2006 USC) hunters, anglers and wildlife watchers spent \$120 billion annually on wildlife recreational spending.

A) Birdwatching has a strong draw appeal to high income households. The Pullis La Roche study confirms that more than one quarter of the individuals who live in households earning hundred thousand dollars or more annually participate in bird watching. The 2006 Florida Wildlife Summary reports 4,240,000 nonresidents and residents in Florida spent more than 16,551,000 days wildlife watching, with trip related expenditures totaling \$887,942,000 per annum and an average participant expenditure of \$720.

B) Hunting and related activities also demonstrate strong tourism numbers in Florida. More than 3,769,000 days were spent in active hunting in Florida with total expenditures racking up \$377,394,000 per annum, according to the 2006 Florida Wildlife Study. The trip average expenditure per hunter was \$1442.

Strengths of the Sumter County Tourism Market Continued...

C) Fishing has the largest potential draw on tourists from all ecotourism subsets. Per annum, more than 2,767,000 anglers spent more than 46,311,000 days searching for that "trophydream fish" in Florida. According to the Florida Wildlife Study, they spent a total of $4,308,583,000 per annum, with an average expenditure per angler of $1,536.

The true power of ecotourism is clear when more visitors came to Florida's State parks than its Theme parks (Visit Florida 2009 marketing report).

Agritourism: Data Indicators

Tourism and agriculture are the top two industries in Florida. Agritourism may be the best method to use and combine the strengths of both industries. Agritourism outlines an approach of using the farm or ranch to attract visitors for the purpose of education, recreation or active involvement in farm. This approach may help sustain the important rural culture of Sumter County.

The University of Florida extension identifies the Cornell University Telephone Study that found more than half the farms that hosted tourism activities had at "least 1500 visitors per year. 28% had 1500 - 5000 visitors per year and 22% had more than 7000 visitors per year." The highest percentage of visitors were children and young families.

Agritourism activities can also benefit related environmental and wildlife activities as indicated in the Giuliano and Thomas study of 2005 which found that bird watching, wildlife viewing, wildlife photography and fishing were all enhanced by agritourism activities. Agritourism activities may be quite varied from eco-safaris, day and overnight experiences on working farms, herb farms,regional cooking instruction, hay mazes and water-based recreational activities.

According to the economic impacts of agritourism in the University of Florida study of South Miami-Dade County, in the state of Vermont annual income agritourism increased more than 80% between 2000 and 2002, which generates an additional $8900 per year per farm annually. In San Diego, California, the popular Flower Fields of Carlsbad drew over $600,000 in admissions with direct expenditures by visitors totaling $2.3 million in Carlsbad and $7.7 million in San Diego County

The University of Florida study of Metro Dade County suggests that if only 1% of their visitors were associated with agritourism, the total revenue would be $139 million or the equivalent of total spending by 113,000 visitors. This assumption is plausible considering that 2% or 226,000 of these tourists visited the Everglades in 2005.

Since each dollar spent by tourists has the potential to generate another $1.40 (multiplier 2.40), the total economic impact on the local economy would be $336 million and would generate an additional 4000 full-time jobs and about $21 million in indirect business taxes to state and local governments."

2) Home to The Villages, the most successful and attractive planned retirement community in the United States with extensive and dynamic shopping (at the level of 30%, shopping represents the highest ranked primary activity of in-state tourists – see appendix a). This is both a national and international identifier.

3) Home to the Webster flea market: one of the oldest and largest continuous flea markets in the United States (30% shopping represents highest ranked primary activity of in-state tourists – see appendix a).

4) Home to the Florida National Cemetery: donated by the people of Sumter County after the Civil War to provide an honorable resting place for both Union and Confederate soldiers. It is now one of the largest and most visited national military cemeteries in United States. (sightseeing activities such as this draw 18% of in-state tourist-see appendix a)

5) Great geographical positioning with outstanding highway systems including Interstate 75 along the western border, further enhanced by US 301 and the Florida Turnpike. Sumter County is not only geographically well-positioned at the apex of Central Florida, but already has an excellent road transportation system in place for access, egress and easy movement throughout the County.

6) Good out-of-state visitor geographic positioning: at the northern apex of the Central Florida triangle, about a one hour drive from both the theme parks mecca of Orlando and the lovely beaches of St.Petersburg, Clearwater and Sarasota. The majority of out-of-state visitors pass through the 100 mile radius of Sumter County.

7) Good in-state geographic positioning. Within a 150 mile radius of Sumter County, there are approximately 8.21 million residents seeking economical, short-trip recreational activities. Sumter County, with the right mix of events, facilities and marketing, can become a successful regional destination.

8) Sumter County cities have unique and creative diversity to draw in-state tourists with the multiple set of interests. There is the urban micro design of The Villages which is already a major regional draw for families and seniors. The City of Wildwood, with its central geographic position and active events such as the Saturday Grower's Market, is an attraction which will mushroom when The Villages newest downtown area, Brownwood, opens for business. The City of Bushnell, steeped in history and agrarian activities has long and deep cultural roots with such gems as the Dade Battlefield Florida Park, close proximity to Florida National Cemetery and an emerging downtown. The City of Webster offers the charm and history of its nationally famous flea market and its unique heritage as the home of the Cattlemen's Association. Center Hill is developing a strong agrarian reputation for its farms and ranches enhanced by the current expansion of the Central Beef processing plant with collateral new businesses. Not only are the cities distinct and unique, but they have worked collectively on countywide issues that provide a solid foundation on which to build a unified and distinctive tourism approach. (All of these activities fit in the tourist sightseeing category, which is third-highest among primary activities for in – state tourism see appendix a)

9) The TDC along with strong leadership on the Board of County Commissioners, seek the benefits of tourism to provide a higher quality of life for residents, attract new businesses related to tourism, enhance revenues for existing businesses and create a stronger market identity for the County which will assist in recruitment of other new businesses.

10) An existing foundation of events and activities. The actual inventory of events currently offered in Sumter County offers substantial opportunities to increase visitors by sharp and focused addition of marketing and promotion.

11) A slowly improving national economy supported and enhanced by a local economy of fiscal conservatism, strong capacity and financial stability.

12) Stakeholders committed to building new and strong partnerships, connecting the dots and building a consistent and integrated visitor strategy of events and facilities coupled with strong marketing. The new alliance of agricultural groups offers an exciting new starting point on all the aspects of agritourism.

WEAKNESSES OF THE SUMTER COUNTY TOURISM MARKET

Sumter County's attractions/facilities/events are relatively unknown at the regional or statewide levels. A recent meeting with a senior commercial bank lender located in Leesburg provided insight to this weakness. Even though he had been in the marketplace for more than 20 years, almost every tourism/business asset of Sumter County was unknown to him. He became animated and excited in his bank playing a stronger role in Sumter County's future after he became acquainted with the facts. Sharing the sweet secrets of Sumter County with new visitors will be a multi-year effort, but once they become knowledgeable about the tourism attractors, visitations will increase.

Sumter County's restrooms, picnic facilities, parking areas, unifying signage, docks, play areas etc., need to be upgraded and expanded to meet standards of regional competitors. A beautiful lakeside picnic location will draw new visitors to Sumter County for a first-time visit, but properly designed, clean and accessible support facilities will bring them back again and again. For example, all major league baseball facilities that upgraded the appearance and cleanliness of women's restrooms experience 20% or more increases in attendance by women (research demonstrated that major league baseball facilities needed to offer twice the restroom facilities per capita for women as for men to meet customer expectations of availability, cleanliness and attractiveness).

Visitors have experienced the high-level of facility design and maintenance evidenced at Walt Disney World © and The Villages. These same visitors have also seen sophisticated facilities in surrounding regional counties and cities. Those experiences raise the expectation for visitors of all facilities and programs. This does not suggest that a dockside fishing facility must be a theme park, but it punctuates the need to offer all visitors well above average experiences to build visitation. Sumter County has a variety of unique areas, facilities and programs that can draw visitation with a strong and continuous marketing program. Once you draw them to visit, everything from the cleanliness of the restroom to the friendliness of the service station attendant contribute to whether or not that individual will be a return visitor.

Sumter County has both attractive facilities and events, but they are not linked or connected in a visitor friendly way to either make navigation around the County easy or to encourage visitors to move from one attraction to another. Today, Sumter County's tourist attractions and facilities have grown without the benefit of an overarching view of what might work best long-term. Sumter County needs a "recreation, open space and tourism facilities" physical plan for mid-range and long-term execution. The County and its cities have terrific natural features and attractions, but need a shared plan/program to minimize long-term costs, maximize cooperation and maximize resident and visitor satisfaction. For example, there are strong beginnings of bike paths in the County. How will they link up to each other and to the other natural features that would enhance tourism visitations? Such is the need to connect the CSX Van Fleet and Withlacoochee State trails at the Green Swamp.

The same is true for the initial plannings of a scenic highway program. A high-level recreation open space and facility plan coordinates and targets long-term capital improvements that will not only dramatically increase the quality of life within the County, attract business and residential investment, but also build memorable tourist visitations. This planning/investment will also help attract new tourism based businesses and new lodgings.

Sumter County currently has a shortage of adequate lodging accommodations to support growth as a visitor destination. More and higher grade lodging experiences will bring more people to visit the county for multi-day visits and thus experience more of Sumter County. Additional hotel rooms will result in a higher tax base which can then be reinvested into marketing of tourism. The result is a virtuous cycle of business and private enterprise benefiting both the tourist industry and the residents of Sumter County. The first step in attracting new lodging construction is simply building total visitor traffic, both day and overnight visitors.

Sumter County needs a wider distribution of restaurants to support increased visitation. The Villages offers a wide variety of style and price levels of restaurants but the availability of restaurants in mid and south county is quite limited.

Sumter County lacks a coordinated tourism signage package, the locations and designations of which should be integrated into a published tourism brochure and website.

RECOMMENDATIONS: POLICIES AND STRATEGIES

Focus on the geographic area within a 150 miles radius of Sumter County. Public relations, promotions and advertising should predominately target this regional area.

Establish a compelling, intuitive and interactive **website** containing current information about events and activities, stakeholder facilities, transportation, unique visitation possibilities (such as the bicycle trail through the green swamp), a single telephone number and e-mail address for additional information, an updated visitor newsletter, visitor reviews and comments and special discounts, admission reductions and **JoyPac** values and incentives.

Create and communicate a highly refined and well-promoted calendar of events:

As we visited with many facilities throughout the County, we were excited to find many events offered, but concern that there was no strong communication base. The first step is setting up both a mechanism and vehicle to capture all events and activities within the County during the year and post them on the calendar centrally located on the website. The Villages each day, each week, and each month, markets its own internal events with full-page marketing pieces in The Villages Daily Sun. The Villages does a superb job in connecting and communicating its events and facilities to its customers. Sumter County can embrace their example to set priorities and benchmarks for the more difficult task of communication to potential regional and statewide visitors who do not know about the treasures of Sumter County.

Advertising/promotion: We will consider prime advertising spots within the defined regional market area and develop favorable rate programs that utilize the best newspaper and magazine connectors for advertising outreach. Radio outreach will also be evaluated. Paid advertising works, but we will also work to develop public relations pieces that appear in regional newspapers through articles, columns and pictorial features. For cost benefit and outreach leverage, web-based advertising should have primary focus.

Sumter County should **initially focus on the first of its four major product categories, a rich natural environment with close proximity to major urban areas** outlined on page 1 in this plan. Within that product category, **fishing as a tourism** activity offers the strongest attraction: a) as a state, Florida is number one in attracting tourists anglers at 885,000 per year; b) Florida is number one in achieving the highest value of direct angling sales among all states of $1 billion per year; and c) as a general recreational draw, fishing is number two only to golf as an outdoor activity in Florida that attracts tourism. The angling "product" reinforces an important part of Sumter County's identity as a natural paradise and provides a low-cost, high-value vacation experience that data shows already attracts visitors from nearby states of Georgia and Alabama."Record catch" photos and trophies reinforce the promise of a better and bigger vacation experience. This attraction can best be enhanced through a managed resource and stocking program combined with unique fishing tournament opportunities.

www.visitsumtercounty.com

Our first priority of expenditure is to **market and communicate Sumter County's existing facilities and events** prior to investing new dollars in new events. The first priority should be the promotion of current events and attractions such as the growing number of activities year round at the County Fairgrounds, local fishing tournaments and the already wildly successful events of The Villages. Sumter County has many significant events whose draw can increase regionally through effective promotion/advertising. Within this first priority, current capital plans to build a combination state-of-the-art indoor shooting/outdoor skeet facility fits well within the outdoor recreation and sport activities theme that would attract tourists from the target market of 100 miles. Furthermore, thoughtful expansion of this area with other outdoor recreational, hunting and sporting activities could give Sumter County a long-term signature tourist attraction in a "Sportsman's Park" experience.

The second priority of expenditure should be to **encourage and support local groups, nonprofit organizations and businesses to present new events.** "Encouragement" is most effectively provided by delivering technical assistance in event production and "support" is most effectively delivered by providing strong promotion and advertising of tourism-based events and facilities. Several new major regional events and other concepts are currently under consideration by the Sumter County Chamber of Commerce, The Villages, fishing guides and lodges and the newly formed Agricultural Alliance.

The third priority of expenditure should be on conducting a full County **open space and recreational review** and establishing a long-term sequential capital budget (Such a planning analysis would cost between $50,000-$100,000). For example, the current effort to formulate a scenic highway program needs to embrace locations for both major current and planned tourism facilities/programs. A simple but important example of this need is the installation of a uniform system of identification signs to assist residents and visitors in finding tourism programs and facilities.

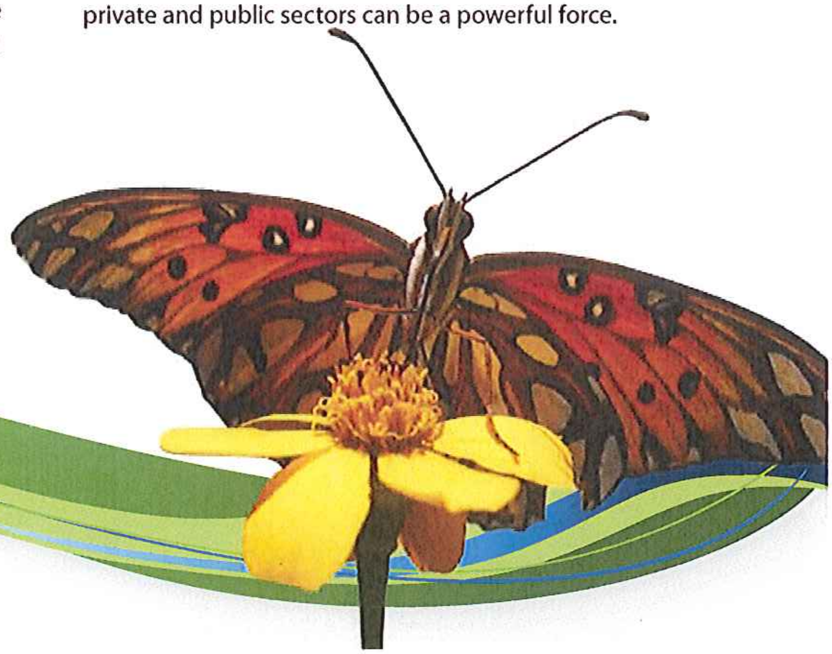
As the Lakeland Ledger stated this January 2, 2011 editorial "Florida's green assets are eminently marketable, but still will require continued public investment to preserve, protect and expand those assets. Turning Florida's green into gold is not alchemy, but rather basic business sense."

Sumter County should update, **print and distribute a comprehensive brochure of events, facilities, partners, contact information,** web information and calendar information. If the installation of a tourist signage package can occur in the next six months, the printing of this brochure should be coordinated with that event. If the installation of a tourist signage package will take longer than six months, an initial smaller printing of a brochure should be done immediately.

Sumter County should **begin outreaching to the national lodging industry** to initially educate and eventually attract new lodging facilities.

Sumter County should **review some of its current tourism policies** such as not permitting the co-promotion of tourism events with private-sector partners. Thoughtful co-promotion better leverages existing funds to attract the most visitors per dollar spent. The current policy document is well-crafted, but needs to reflect changes in ideas approved for action in the 2010 Strategic Economic Development Plan.

Sumter County should focus its primary responsibility on developing, monitoring and **improving the core campaign to market and grow existing events and facilities** by focusing its attention on tourism industry communication, County communication and the purchasing and placement of advertisement to promote visitation. The local partners can focus on the nuts and bolts of producing events and the County can focus on how to best advertise and communicate these potential events and facilities to new and returning visitors. The combination of private and public sectors can be a powerful force.



Recommendations: Start-up Program

Step 1:

- Create and deliver logo, branding and theme for Sumter County Marketing Tourism Campaign
- Trademark "Visit Sumter" branding
- Build database of tourism stakeholders/businesses
- Create and launch tourism newsletter for industry
- Introductory press release and electronic media releases
-

Step 2:

- Design and architect the interactive tourism website application, including an administrative back-end utility for content management and calendar of events
- Deliver fish stocking program and first tournament program, including/costs/dates
- Deliver specific plan for 2011 – 2012 tournament fishing program in cooperation with local stakeholders

Step 3:

- Creation of website user interface and development of database back-end for content management and managing the calendar of events
- Deliver Search Engine Optimization and internet marketing plan
- Create draft "recreational and open space" RFQ deliverables
- Comprehensive tourism brochure

Step 4:

- Populate calender database with tourism related events data
- Launch finalized tourism website
- Draft review/recommendations on the Sumter County tourism grant guidelines

Step 5:

- Deliver final documents of recommendations on Tourist Grant Guidelines and RFQ for "recreational and open space" plan
- Deliver full marketing plan and program for October 1, 2011-September 30, 2012, including augmented marketing mix and broader media coverage
- Deliver at least three specific new tourism outreach programs for 2011 – 2012 created in cooperation with local stakeholders
- Deliver plan for Sumter County agritourism related marketing initiative in cooperation with agribusiness stakeholders, to be produced within the 2011-2012 fiscal year
- Follow-Up Tourism Survey

RECOMMENDED 2011-2012 BUDGET:

Action steps and deliverables

Tourism is Florida's largest industry.

Central Florida is the most successful regional destination in the state. This success does not come easily or inexpensively. The Orlando Convention and Visitors Bureau spends more than $55 million a year to achieve its sparkling results. Our other surrounding counties also have aggressive tourism budgets ranging from $600,000 in Citrus County to $8,842,113 in Polk County. To gain and maintain a successful destination program, Sumter County faces the dual challenges of overcoming current low recognition/identity among existing tourists and limited long-term resources to gain initial market penetration and drive annual visitation growth. Sumter County has been successful in other highly competitive regional issues by embracing new, innovative but cost-conscious alternatives. We recommend a similar approach in launching the tourism program.

Sumter County's funding source for tourism promotion is the tourist development tax (also known as the "bed tax") which currently levies a 2% tax on lodging (see appendix). The tourist development tax has annually garnered between $298,813 – $354,124 for the years from 2005 to 2010. During this period, the Sumter County Tourist Development Council has advised and the Sumter County Board of County Commissioners has limited marketing expenditure until a Strategic Tourism Plan could be developed and approved. This conservative approach has had the positive result of building the fund reserve to approximately $1,010,417.

The input, recommendations and approval of this plan through the Tourist Development Council and finally to the Sumter County Board of County Commissioners can be achieved by June of this year. It is anticipated, the 2% tourist tax will generate approximately $321,502 for the 2010 – 2011 budget year, based on current trends and average revenues over the previous 5 years. To be fiscally conservative and program aggressive, E5 solutions recommendation outlines a program and expenditure plan to maintain expenditures within this year's revenue stream, but execute those expenditures to occur in the final months of the current budget year to gain an accelerated launch. The initial program recommendations would be funded from current year revenues -except for the fish stocking program which would be funded from the tourist tax reserve.

Most budgeting processes build their expenses against anticipated revenues of the coming fiscal year. Due to the current state of the economy we recommend future tourism budgets be built around achieved revenues for the previous year. In other words, recommended expenses in the budget year 2011 – 2012 would be based upon actual revenues achieved in budget year 2010 – 2011. Furthermore, we recommend each annual budget contain a 10% contingency to cover unexpected expenses and/or allow program adjustments during the annual cycle. As the Plan gains solid footing, it may then be more prudent to consider expenditures of reserves and/or adding to the percentage of the tourist tax.

Prove the plan first, gain the support and partnership of stakeholders and then consider more aggressive capital and promotional expenditures.

Finally, the recently amended policy to guide tourism expenditures is well-crafted, but should be reviewed against some of the suggested strategies in this Plan. The TDC and the Board of County Commissioners may wish to consider additional policy changes to best leverage resources. For example, tourism programs throughout the state of Florida permit and seek co-promotional partnerships with private sector ventures. This can often be the best way to leverage public dollars to gain the fastest growth in tourism at the overall lowest costs. Under the current policy structure, such opportunities are prohibited. Reviewing this policy could also allow a stronger partnership philosophy.

Whenever possible, the TDC should focus on reviewing and recommending mid and long-term goals to the Board of County Commissioners and recommending strong advertising and promotional support to local events and activities that increase visitation. Certainly, some dollars should be invested in worthwhile startup programs, but the best long-term return on investment assigns the cost of producing events to the primary responsibility of sponsoring local organizations, promoters and tourism facilities. The TDC can best assist them and the County by recommending a strong, coordinated and fully integrated promotion and marketing program.

Program Costs

E5solutions has performed a competitive analysis of the tourism programs and budgets of surrounding counties. By comparing the budgets of those surrounding counties, we have arrived at a comparative budget projection.

Collectively, the per capita tourism expenditure averaged $6.26. Extrapolating from that average, (based on Sumter County's population projection for 2011 of 98,222) projected annual expenditure for tourism activities/promotion in Sumter County could be $614,958 . We are initially recommending a more conservative approach including an accelerated launch budget of $240,397 for the term of June 2011 – September 2011 with future annual budgets structured from the previous years earned tourist tax revenues. After launching this program, evaluating the results and identifying future specific targets needs, future budget options could be more aggressive.

In addition to the competitive budget analysis, we also underwent a cost-based analysis, estimating the comprehensive cost of executing all the elements within the recommended programs (cited in the Recommendations section of this report). The total cost of producing all the elements outlined in this plan, which are triggered within the first 5 months of the Plan's inception, is estimated to be $240,397. This approach sets a strong foundtion, jump-starts the program and still stays well within earned revenues from FY 2009 – 2010.

As research in this plan demonstrates, major tourism efforts within Sumter County are just beginning. Such a strategic position is reinforced by comparison of tourism promotion expenditures by our regional competitors. Even with these two compelling reasons, this plan recommends a more conservative approach until a strong and integrated foundation is built.

Working closely with the county and industry stakeholders, an additional action plan for the 2011-2012 fiscal year could be delivered in September 2011. This longer-term action plan will build on the foundation put in place during the first 5 months start-up phase and incorporate the next phase of tourism development, including augmentation of the marketing mix with additional media production services, (such as promotional videos and expanded internet and social media marketing) as well as increased media buys across all channels to enhance regional promotional coverage.

Tourism Budget Comparison (adjacent counties)

County	Pop	Total $	Personnel	Operations	Personnel %	$ Per Capita
Marion	328,547	975,000	204,000	771,000	21%	2.97
Lake	312,119	1,890,000	635,000	1,255,000	34%	6.06
Polk	583,403	8,842,113	2,084,722	6,757,391	24%	15.16
Pasco	471,709	737,000	76,052	660,948	10%	1.56
Hernando	171,233	618,000	151,835	466,165	25%	3.61
Citrus	140,357	1,153,000	137,000	1,016,000	12%	8.21

Monitoring/Evaluation/Feedback:

In the advertising industry, there is an adage that 50% of all marketing and promotion dollars are effective, but the management difficulty is determining which 50%. Even with that adage, there are some fundamental monitoring actions that help program administrators and policymakers measure the effectiveness of this program:

1. Monitor collection amounts of the tourist tax revenues and compare/contrast those revenues to previous months and years.

2. Collect and report actual attendance at cosponsored events.

3. Monitor the number of daily "website hits", "click-throughs" and keyword appearances on search engines.

4. Monitor, collect and value any public relations articles or columns appearing in the print or electronic media.

5. Monitor stakeholders attendance report at Sumter County facilities and events and compare/contrast to previous periods.

6. Monitor those collateral reported revenues such as "sales of freshwater fishing licenses" in Sumter County and within a 100 mile radius.

7. Report results from any "coupon partner offers" for discounts on lodging, meals or admissions that are co-promoted.

To ensure ongoing communication with the industry and policymakers, we recommend a semiannual status report on the tourist program to the Board of County Commissioners, an annual "State of Tourism" forum for stakeholders, a monthly report on deliverables to the County Administrator/Board of County Commissioners, a monthly tourism newsletter and other timely communication press releases/alerts.

IN-STATE TRAVEL

- SNAPSHOT
- TRENDS 2005-2009
- RESIDENT TRAVEL PATTERNS

SNAPSHOT

In 2009, Floridians took nearly 17 million leisure trips in-state, spending an estimated $5.8 billion in the course of their travels. Estimates of value are based on data from VISIT FLORIDA's 2008 Florida Visitor Study, which shows that, on average, in-state leisure travelers (excluding those traveling for business or visiting friends and family) spend $102 per day for an average of 2.6 nights.

TRENDS 2005-2009

Plummeting home values and unemployment levels that exceeded the U.S. average contributed to a challenging 2009 economic climate for Florida. As a result of the economic squeeze and its psychological impact, Floridians took one million fewer pleasure trips in-state or out-of-state in 2009. Travel by Floridians within the state also suffered, showing a 1.8 percent decline, remaining roughly flat.

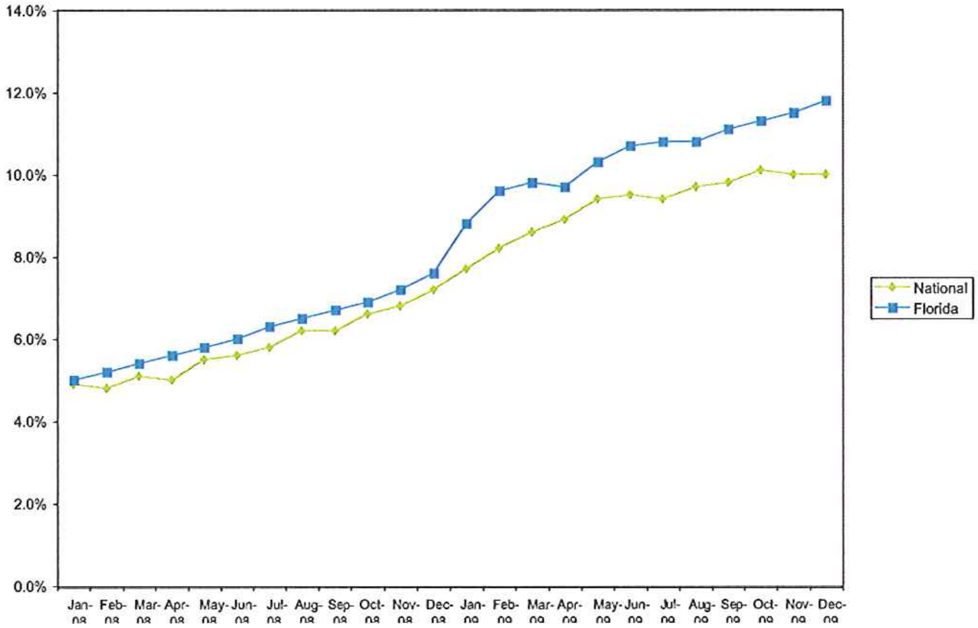
Pleasure Trips by Florida Residents

Calendar Year: January to December (in Thousands of Person-Trips)

Year	Residents Taking Pleasure Trips			Residents Taking Trips In-State		
	% on Trip	Est. Person-Trips	% Chg	% on Trip	Est. Person-Trips	% Chg
2005	17.7%	36,952	8.3%	36.0%	13,303	-1.3%
2006	16.9%	36,078	-2.4%	35.9%	12,952	-2.6%
2007	18.3%	39,725	10.1%	35.0%	13,904	7.3%
2008	21.2%	46,431	16.9%	36.8%	17,087	22.9%
2009	20.6%	45,308	-2.9%	37.0%	16,764	-1.8%

Source: VISIT FLORIDA (2005-2007 data based on data from the Consumer Attitude Survey of the University of Florida, BEBR; 2008-2009 data based on a consumer survey conducted by A New View Research d/b/a beSatisfied.

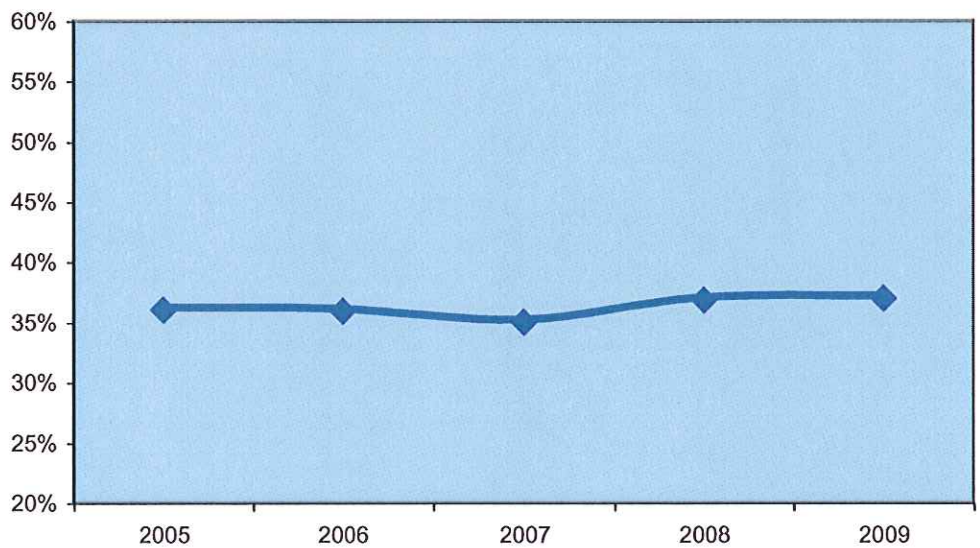
Unemployment Rate



Source: Bureau of Labor Statistics

Percentage of In-State Pleasure-Trips by Floridians

Calendar Years 2005-2009



Source: VISIT FLORIDA (2005-2007 data based on data from the Consumer Attitude Survey of the University of Florida, BEBR; 2008-2009 data based on a consumer survey conducted by A New View Research d/b/a beSatisfied.

The Opportunity Ahead

Though Florida has been successfully selling the sunshine to Americans for nearly a hundred years, we have been less focused on selling Florida travel to our own residents. In recent years, the percentage of in-state residents taking leisure trips in Florida has remained relatively flat, varying between a low of 35 percent in 2007 and a high of 37 percent in 2009.

Current conservative consumer spending trends and the increasing appeal of nearby destinations have influenced resident travel in many states. Pennsylvania, for example, increased its share of Philadelphia vacationers by 6.3 percentage points between 2007 and 2008. In the same period, Texas gained 7 percentage points of Dallas residents' travel, and Connecticut gained 6.9 percentage points of Hartford residents' travel. Given the depth and breadth of our vacation product, and the current consumer focus on conservative spending, Florida travel for Floridians is a growth opportunity.

RESIDENT TRAVEL PATTERNS IN-STATE

Based on 2008 research focused on in-state resident travel for pleasure, excluding travel to visit friends and family.

Based on 2008 research, Florida residents who took a pleasure trip within the state usually spend an average of one to two nights away from home (32 percent and 33 percent, respectively). The average length of stay for Floridians who take a leisure trip in-state is 2.6 nights and the average travel party size is 2.7 people. Residents traveling in-state tend to be couples (38 percent), but are followed very closely by families traveling together (37 percent). As a comparison, only 23 percent of residents taking out-of-state leisure trips are families.

The most common type of accommodation residents stayed in when traveling around the state is a hotel/motel paid (64 percent), followed by non-paid accommodations (23 percent) and a non-hotel/motel paid (14 percent). Average expenditures per person per day for residents traveling within the state are $102.

Impact on Florida Regions

In-state travel is especially important to Orlando, which is the destination for 36 percent of all in-state pleasure trips. Tampa-St. Petersburg-Clearwater draws 13 percent of in-state travel, while Jacksonville draws 8 percent. In-state travel is also important to less developed and more rural areas, with destinations in non-metropolitan service areas (MSA) attracting 8 percent of in-state leisure trips.

Origin Markets for Resident Leisure Travelers

One-fifth, or 20 percent, of all in state travelers come from the West Central region which includes Tampa-St. Petersburg, Clearwater and Sarasota-Bradenton. Slightly more (22 percent) come from South Florida (Fort Lauderdale-Pompano Beach, Miami-Miami Beach-Kendall and West Palm Beach-Boca Raton). Jacksonville residents comprise 10 percent of the state's travelers, and Orlando provides 8 percent.

Detailed Profile of Resident Travel Patterns

From VISIT FLORIDA'S 2008 Florida Visitor Study

Transportation	
Non-Air	98%
Air	2%

Length of Stay	
1 night	32%
2 nights	33%
3 nights	18%
4 nights	7%
5 to 7 nights	8%
8+ nights	3%
Median	**2.0 nights**
Average	**2.6 nights**

Party Size[1]	
Couples[3]	38%
Families	37%
One Adult	12%
Three or more adults	8%
Two males or two females	5%
Median Persons	**2.0**
Average Persons	**2.7**

Average Expenditures	
(per person per day)	$102

Primary Activities[1,2]	
Shopping	30%
Theme/Amusement Park	25%
Touring/Sightseeing	18%
Beach/Waterfront	17%
Night Life	10%
Parks: national, state +	7%
Visit Historic Site	5%
Hunt, Fish	5%
Camping	5%
Festival, Craft Fair +	5%
Watch Sports Event	5%
Concert, Play, Dance	4%
Boat/Sail	4%
Museum, Art Exhibit	4%
Other Adventure Sports	3%
Gamble	3%
Group Tour	3%
Nature/Culture -- Eco-travel	3%
Hike, Bike +	2%
Shows: boat, auto, antique +	2%
Look at Real Estate	2%
Play Golf	2%

Accommodation Type[1]	
Hotel/B&B	63%
Home/Apt/Condo (not mine)	18%
Condo/Timeshare	5%
Other	15%

Age of Adult Traveler	
18 - 34 Years Old	33%
35 - 49 Years Old	32%
50 - 64 Years Old	21%
65+ Years Old	14%
Median Age	**42.0**
Average Age	**45.0**

Household Income	
Under $50,000	25%
$50,000 - $74,999	26%
$75,000 - $99,999	16%
$100,000 and over	32%
Average HH Income	**$ 85,640**

Top Destination MSAs in state[1]	
Orlando, FL	36%
Tampa-St. Petersburg-Clearwater, FL	13%
Not in an MSA	8%
Jacksonville, FL	8%
Deltona-Daytona Beach-Ormond Beach, F	5%
Miami-Miami Beach-Kendall, FL	4%
Fort Lauderdale-Pompano Beach, FL	3%
Naples-Marco Island, FL	3%
Gainesville, FL	3%
Palm Bay-Melbourne-Titusville, FL	2%

Origin MSAs of Floridians Traveling In-State[1]	
Tampa-St. Petersburg-Clearwater, FL	16%
Jacksonville, FL	10%
Fort Lauderdale-Pompano Beach, FL	8%
Orlando, FL	8%
Miami-Miami Beach-Kendall, FL	7%
West Palm Beach-Boca Raton, FL	7%
Not in an MSA	6%
Cape Coral-Fort Myers, FL	5%
Deltona-Daytona Beach-Ormond Beach, F	5%
Sarasota-Bradenton-Venice, FL	4%

[1]Based on CY 2007-2008 data to procure a large enough sample size.

[2] Multiple responses are allowed.

[3] A couple is defined as one male and one female.

Source: D.K Shifflet & Associates

In 2008, VISIT FLORIDA switched vendors for in-state data from the University of Florida to A New View Research d/b/a beSatisfied. As a result, profile data of Floridians who travel within the state is not comparable with previous years' data. In order to garner a large enough sample size for some variables, more than one year was combined. This has been noted when it occurred. The profile was created based on residents that took an overnight leisure trip (defined as leisure, but does not include visiting friends or relatives).

INSIGHTS

IN-STATE

- Responding to a tougher local economy than many parts of the country, Floridians traveled less overall in 2008. Not surprisingly, in-state travel by Floridians remained relatively flat. Given the significant growth in regional drive travel in other parts of the country – and in Florida prior to the most recent economic challenges – in-state travel may be an opportunity for significant growth as Florida comes out of the recession.

- Survey data related to Floridian attitudes about tourism suggest a relationship between awareness about the impact of tourism and in-state resident travel. In a VISIT FLORIDA survey conducted in 2008, residents who traveled in-state were more likely to agree or strongly agree with a statement that tourism was responsible for some of their household income (34.5 percent) than residents overall (30.5 percent). There may be potential to increase in-state travel by increasing resident awareness of the beneficial economic impact of tourism.

- In-state resident travel patterns reveal two additional opportunities: resident interest in traveling as a family and interest in traveling to non-MSA areas. Residents already are predisposed to these patterns and both help complement the travel patterns of non-resident drive travelers to the state.

County Tax Rates for Tourist Development and Discretionary Taxes

*Please note that counties who self-administer their Tourist Development Tax are not required to report rate changes to the Florida Department of Revenue, therefore, their information may not be accurate. We apologize for any inconvenience this may cause. In addition, the Tourist Development rates below do not include any applicable Tourist Impact Tax or Convention Development Tax.

		Tourist Development			Discretionary				
County #	County	Rate	Start	Self-Admin*	Rate	Start	Expire(d)	.5% School	County
11	ALACHUA	3.0%	6/87	7/01	0.25%	1/05	12/11		ALACHUA
11	ALACHUA				0.5%	1/09	12/10		ALACHUA
12	BAKER	2.0%	5/00	5/00	1.0%	1/94	NONE		BAKER
13	BAY	5.0%	3/86	1/94					BAY
14	BRADFORD	4.0%	11/90		1.0%	3/93	NONE		BRADFORD
15	BREVARD	5.0%	12/86	10/92					BREVARD
16	BROWARD	5.0%	12/80	3/94					BROWARD
17	CALHOUN				1.0%	1/93	NONE	1/09-12/18	CALHOUN
18	CHARLOTTE	5.0%	4/84	9/90	1.0%	4/95	12/14		CHARLOTTE
19	CITRUS	3.0%	12/86						CITRUS
20	CLAY	3.0%	1/89	1/89	1.0%	2/90	12/19		CLAY
21	COLLIER	4.0%	1/93	1/93					COLLIER
22	COLUMBIA	3.0%	12/84		1.0%	8/94	NONE		COLUMBIA
23	DADE	3.0%	12/78	4/88	0.5%	1/92	NONE		DADE
23	DADE				0.5%	1/03	NONE		DADE
24	DESOTO				1.0%	1/88	NONE		DESOTO
25	DIXIE				1.0%	4/90	12/29		DIXIE
26	DUVAL	4.0%	1/79	12/90	0.5%	1/89	NONE		DUVAL
26	DUVAL				0.5%	1/01	12/30		DUVAL
27	ESCAMBIA	4.0%	12/80	6/89	1.0%	6/92	12/17	1/98-12/17	ESCAMBIA
28	FLAGLER	3.0%	12/86		0.5%	1/03	12/12	1/03-12/12	FLAGLER
29	FRANKLIN	2.0%	1/05		1.0%	1/08	NONE		FRANKLIN
30	GADSDEN	2.0%	1/03		1.0%	1/88	NONE		GADSDEN
30	GADSDEN				0.5%	1/09	12/38		GADSDEN
31	GILCHRIST	2.0%	1/07		1.0%	10/92	NONE		GILCHRIST
32	GLADES	2.0%	1/09		1.0%	2/92	12/21		GLADES
33	GULF	4.0%	1/99	6/01	1.0%	1/06	NONE		GULF
34	HAMILTON	3.0%	11/96		1.0%	7/90	12/19		HAMILTON
35	HARDEE				1.0%	1/90	NONE		HARDEE
36	HENDRY	3.0%	2/03		1.0%	1/88	NONE		HENDRY
37	HERNANDO	3.0%	1/93	1/93				1/05-12/14	HERNANDO
38	HIGHLANDS	2.0%	1/03		1.0%	11/89	10/19		HIGHLANDS
39	HILLSBOROUGH	5.0%	10/78	1/92	0.5%	10/01	NONE		HILLSBOROUGH
39	HILLSBOROUGH				0.5%	12/96	11/26		HILLSBOROUGH
40	HOLMES	2.0%	1/05		1.0%	10/95	12/13		HOLMES
41	INDIAN RIVER	4.0%	4/87	10/00	1.0%	6/89	12/19		INDIAN RIVER
42	JACKSON	4.0%	1/99		1.0%	6/95	12/25	7/96-12/15	JACKSON
43	JEFFERSON	2.0%	2/07		1.0%	6/88	NONE		JEFFERSON
44	LAFAYETTE				1.0%	9/91	NONE		LAFAYETTE
45	LAKE	4.0%	12/84	11/98	1.0%	1/88	12/17		LAKE
46	LEE	5.0%	11/82	5/88					LEE
47	LEON	5.0%	5/88	10/94	1.0%	12/89	12/19	1/03-12/12	LEON
48	LEVY	2.0%	1/03		1.0%	10/92	NONE		LEVY
49	LIBERTY				1.0%	11/92	NONE		LIBERTY
50	MADISON	3.0%	1/99		1.0%	8/89	NONE		MADISON
50	MADISON				0.5%	1/07	NONE		MADISON
51	MANATEE	5.0%	1/81	10/89				1/03-12/17	MANATEE
52	MARION	2.0%	1/05	4/08					MARION
53	MARTIN	4.0%	11/02	11/02	0.5%	1/07	12/11		MARTIN
54	MONROE	4.0%	12/81	1/91	1.0%	11/89	12/18	1/96-12/15	MONROE
55	NASSAU	3.0%	1/89	5/89	1.0%	3/96	NONE		NASSAU
56	OKALOOSA	5.0%	11/89	7/92					OKALOOSA
57	OKEECHOBEE	3.0%	1/93		1.0%	10/95	NONE		OKEECHOBEE
58	ORANGE	6.0%	5/78	1/92				1/03-12/15	ORANGE
59	OSCEOLA	6.0%	12/77	5/92	1.0%	9/90	8/25		OSCEOLA
60	PALM BEACH	5.0%	10/82	1/93				1/05-12/10	PALM BEACH
61	PASCO	2.0%	1/91		1.0%	1/05	12/14		PASCO
62	PINELLAS	5.0%	11/78	10/90	1.0%	2/90	12/19		PINELLAS
63	POLK	5.0%	12/86	1/94	0.5%	1/05	12/19	1/04-12/18	POLK
64	PUTNAM	4.0%	1/93	4/99	1.0%	1/03	12/17		PUTNAM
65	ST JOHNS	4.0%	12/86	8/88					ST JOHNS
66	ST LUCIE	5.0%	11/84	5/91				7/96-12/26	ST LUCIE
67	SANTA ROSA	4.0%	1/92	5/94				10/98-12/18	SANTA ROSA
68	SARASOTA	4.0%	11/88	6/92	1.0%	9/89	12/24		SARASOTA
69	SEMINOLE	5.0%	1/89	9/93	1.0%	1/02	12/11		SEMINOLE
70	SUMTER	2.0%	1/05		1.0%	1/93	NONE		SUMTER
71	SUWANNEE	2.0%	1/91	11/01	1.0%	1/88	NONE		SUWANNEE
72	TAYLOR	3.0%	12/98	7/06	1.0%	8/89	12/29		TAYLOR
73	UNION				1.0%	2/93	NONE		UNION
74	VOLUSIA	3.0%	5/78	4/90				1/02-12/16	VOLUSIA
75	WAKULLA	2.0%	4/95		1.0%	1/88	12/17		WAKULLA
76	WALTON	4.5%	10/86	10/91	1.0%	2/95	NONE		WALTON
77	WASHINGTON	3.0%	1/01		1.0%	11/93	NONE		WASHINGTON