

**SUMTER COUNTY BOARD OF COMMISSIONERS
EXECUTIVE SUMMARY**

SUBJECT: 2011 Sumter County Tourism Plan

REQUESTED ACTION: Adoption of the Plan

Work Session (Report Only) **DATE OF MEETING:** 6/14/2011

Regular Meeting Special Meeting

CONTRACT: N/A

Effective Date: _____

Managing Division / Dept: _____

Vendor/Entity: _____

Termination Date: _____

BUDGET IMPACT:

Annual

Capital

N/A

FUNDING SOURCE: _____

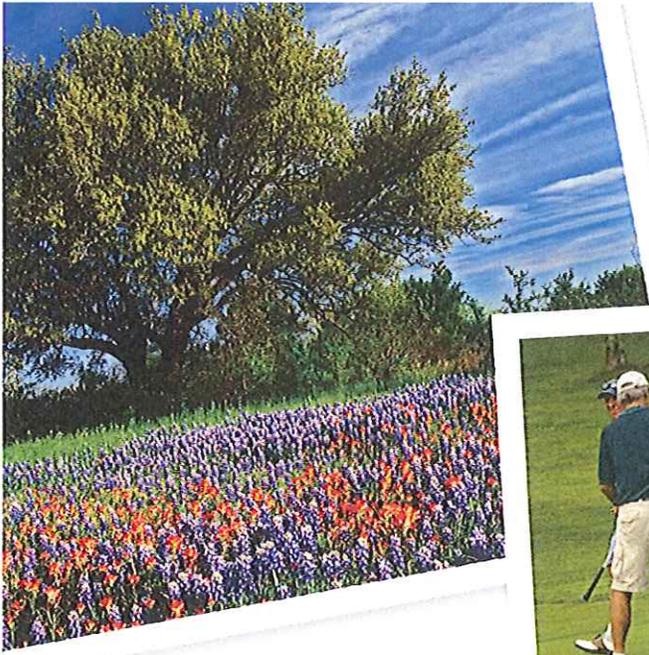
EXPENDITURE ACCOUNT: _____

HISTORY/FACTS/ISSUES:

The adoption of the tourism plan will conclude the work activities of E5 Solutions, Inc. related to this project.

As noted within the document, the sources utilized to directly support the recommendations and conclusions are clearly annotated. The legal opinions expressed related to tourist development tax dollars within the document are intentionally vague since E5 Solutions, Inc. is not the legal advisor to the BOCC; however, as you will note in the memorandum provided by the County Attorney that a yes answer comes with many caveats.

Although the BOCC is not receiving a recommendation from the Tourist Development Council (TDC) related to the final review of this plan, it will be provided to the TDC for the next step of recommending priority use of the tourist development tax dollars with this plan as a supporting document for the same. Please note that the draft plan was presented to the TDC albeit a quorum was not present for that meeting as well as discussion of the same at the subsequent meeting. The points and concerns presented at those TDC meeting were received and therefore staff views those were addressed in the attached document for adoption.



business } or } BOTH
pleasure }

2011 Sumter County Tourism Plan



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06/06/2011

TOURISM PLANNING ANALYSIS AND REPORT

Visit Sumter

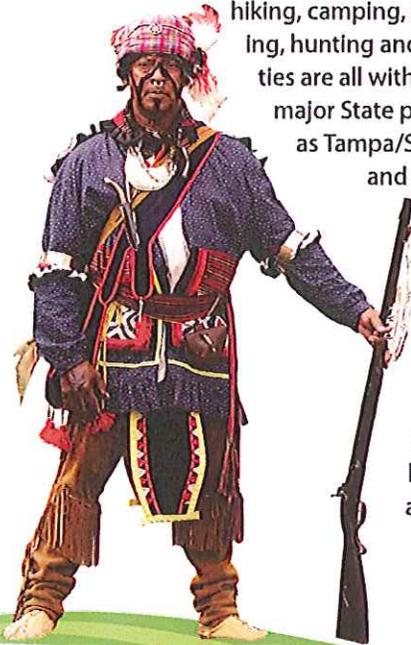
Sumter County is relatively unknown as a tourist destination. It has good geographical positioning and some attractive visitor facilities and events, but it is in a formative stage of developing its tourism potential.

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 Morris

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, 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, 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. 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 shop. 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.

Additional 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 Festival" will 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 and consists of the following sections:

- Define Goals and Objectives
- Review the Current Situation
- Identify Target Markets
- Strengths of the Sumter County Tourism Market
- Weaknesses of the Sumter County Tourism Market
- Competing and Complementary Regional Visitor Attractions
- Recommendations: Policies and Strategies/Programs
- Program Priorities
- Suggested 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 a beautiful landscape with lakes, rivers, numerous parks and preserves bisected by winding tree shaded roads traversing farms and cattle ranches. 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 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 out-of-state 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 2009–2010, 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 in-state 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. 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 2011 Sumter County Tourism Plan.

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. 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; 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.

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

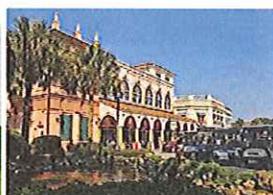
Ecotourism is in a steady and rapid growth pattern. According to a study by the **International Ecotourism Society (2006)**, the rate of ecotourism is growing three times faster than general tourism and enjoys a 34% annual increase in visit-related expenditures since the 1990s. The mere act of visiting 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, 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 (2006)** confirms that more than one quarter of the individuals who live in households earning \$100,000 or more annually participate in bird watching.

b. Hunting and related activities also demonstrate good tourism numbers in Florida. More than 3,769,000 days were spent in active hunting in Florida with total expenditures racking up \$381,496,000 per annum according to the **2006 Florida Wildlife Study**. The trip average expenditure per hunter was \$1,442 with annual expenditures in the state, totaling \$377,394,000. According to the same study, hunters and anglers in Florida total 5.9 million, with more than \$8.1 billion in overall wildlife associated expenditures.

The true power of ecotourism is clear when more visitors came to Florida's State parks than its theme parks (**Visit Florida 2010-2011 Marketing Plan**).



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, and active involvement in the farm. This approach may help sustain the important rural culture of Sumter County.

The University of Florida extension identifies the **Cornell University Telephone Study (2008)** that found more than half the farms that hosted tourism activities had at "least 1500 visitors per year. 28% of the farms 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 from 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 University of Florida study, **Potential Impacts of Agritourism in South Miami-Dade County (2006)** the state of Vermont annual income from agritourism increased more than 80% per year between 2000 and 2002, which generated 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 UF study also 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, according to **2010-2011 Destination Marketing Plan**. 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. (again, shopping represents the highest ranked primary activity of in-state tourists, at 30%)

4) Home to the Florida National Cemetery: one of the largest and most visited national military cemeteries in United States. (sightseeing activities such as this draw 18% of in-state tourists according to the **2010-2011 Visit Florida Destination Marketing Plan**.)



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 150 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 Cattleman'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. 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 according to Visit Florida)

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 some 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

1) 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.

2) 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.

3) 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 fa-

cilities 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 Bike Trail and Withlacoochee State Bike 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.

4) 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.

5) 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.

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

7) Sumter County has disconnected stakeholders. There is very little communication to or among the lodging, restaurant, event or facilities industry groups.

Competing and Complementary Regional Visitor Attractions

In reviewing and analyzing the current economic climate and its effect on leisure travel and visitor volume, it is valid to conclude that it could be better. The plummeting home values and sales regionally and nationally, and the high unemployment levels, combine to challenge upward tourism volume.

Visit Florida, the State's tourism marketing corporation, reports in its **2010-2011 Visit Florida Destination Marketing Plan** that Floridians took one million fewer pleasure trips in-state or out-of-state in 2009, and travel by Floridians within the state suffered, showing a 1.8% decline, remaining roughly flat. That said, the most recent counts for 2010's third quarter report Florida's visitors topped 18.9 million, an actual increase of 0.6% above the same quarter of '09. This small improvement is encouraging, especially as it came in spite of the Gulf oil spill publicity, combined with the overall faltering economy.

Current Travel/Tourism Trends

In-State Traveler Destinations Leisure travel trends in Florida reflect no major surprises, but are meaningful when considering future tourism development for Sumter County. In-state traveler analysis shows 36% of all Florida in-state pleasure trips aim for Orlando, with Tampa-St. Petersburg-Clearwater drawing 13% and Jacksonville, 8%. Encouragement for Sumter promotion planning is the fact that another 8% of all Florida in-state pleasure trips are attracted to more rural, less-developed areas.

In-State traveler Origins

More encouraging facts come from **Visit Florida's 2008 Florida Visitors Survey**, as their analysis says that one-fifth, or 20% of all in-state travelers originate from the West Central region including Tampa-St. Petersburg-Clearwater and Sarasota-Bradenton, with 22% from South Florida (Ft. Lauderdale-Pompano Beach, Miami-Miami Beach-Kendall and West Palm Beach-Boca Raton), Jacksonville sending 10 percent, and Orlando providing another 8%. Overall, this is positive data when targeting future short term (day, overnight, weekend) pleasure trips

to Sumter. Of interest, Visit Florida cites a reduced focus in past years on selling Florida travel to our own Florida residents. In-state residents taking leisure trips within Florida has remained relatively flat in recent years, varying between a low of 35% and a high of 37% in 2009. This presents a potential strong marketing opportunity for Sumter County visitation, especially when considering today's economy and the economy of shorter, in-state trips.

The Competition

In preparing a tourism marketing plan featuring the visitor advantages of Sumter County, it is important to consider the competition, those adjacent attractions, features and events that may compete for attention. Here is a diverse, non-comprehensive list of points of interest surrounding Sumter County, in no particular order. For current planning purposes, an approximately 150 mile radius is applied.

Sumter County Visitor Competition - A Non-Comprehensive List of Attractions, Events and Parks - *(All trademarks are the property of their respective companies).*

Discovery Cove, Busch Gardens, Wild Adventures Park, Blizzard Beach Downtown Disney, Lion Country Safari, Cirque du Soleil, Animal Kingdom, Epcot, Skydive Space Center, Big Toho Airboat Rides Spa World, LegoLand, Blue Spring State Park, Winter Home to Indian Manatees, Rock Springs, Harry P. Leu Gardens, Lake Rowena Tower Gardens, Bok Sanctuary, Lake Wales, Fantasy of Flight, Smart Department Store, Lake Buena Vista Factory Stores, Bargain World, Frank Lloyd Wright Architecture, Cattle Ranching & Cow Camp at Lake Kissimmee St. Park, Polk County Historical Museum with Native American Life and Cracker Culture, Florida Air Museum at Sun & Fun, Polk Museum of Art, Polk Theater, Water Ski Hall of Fame, Florida EcoSafaris, Busch Gardens Africa, UCF, UF and USF football and basketball, Central Florida Zoological Park, Jungle Adventures, Brevard Zoo, Silver Springs, Gatorland, Green Meadows Petting Farm, Manatee Rescue, Penguin Encounter, Pets Ahoy, Weeki Wachee Springs Water Park, Morse Museum of American Art, Flea World & Fun World, HolyLand Experience, Kart World, Lowry Park Zoo, Horse World Riding Stable, Museum of African American Art, Museum of Science & Industry, Showcase of Citrus, Dali Museum, Holocaust Museum,

Tampa Bay Downs horseracing, Leesburg Bike Fest, Gen James A. Van Fleet State Park, Ocala Historic District, Appleton Museum of Art, Ocala National Forest, Wild Waters Waterpark, Don Garlits Museum of Drag Racing, Ocala Carriage & Tours, Discovery Center, Dudley Farm State Park, Marjorie Rawlings State Park, Mill Creek Farm, Haile Homestead, The Gainesville Swamp, Buccaneers Football & Stadium, Archer Railroad Museum, Tropicana Field, Florida Museum of Natural History, Florida Carriage Museum & Resort, Mt. Dora Museums, events and heritage, Uncle Donald's Farm, Tavares Sea Plane Base & Rides, Citrus Tower & Showcase of Citrus, A Hitch 'n Time Carriages, multiple assorted discount and outlet shopping venues, and beach communities of Pinellas County.

Competition demands energetic Sumter marketing:

This full range of diverse competitive activity surrounding Sumter County demands, to be successful, Sumter visitor promotion be creative, head-turning and eye-opening. A basic, relaxed visitor marketing campaign will likely not capture the attention and motivate regional leisure travelers in this competitive marketplace. Sumter is conveniently positioned in the state, yet also is directly adjacent to Florida's most popular tourist destinations including Orlando attractions and the beach communities of Tampa Bay.

Recommendations: Policies, Strategies and Programs

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 **web-site** 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 basis. 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: The County should 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 should also be evaluated. Paid advertising works, but the county 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 one (1) of 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
- c) as a general recreational draw, fishing is number two only to golf as an outdoor activity in Florida that attracts tourism.

Source: 2010-2011 Visit Florida Destination Marketing Plan

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.

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 150 miles. Furthermore, expanding the concept to include other ecotourism activities and programs such as fishing, hiking, wildlife watching, boating, archery would strengthen the visitor draw significantly and 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 in its 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.

Priority Programs

The following are the suggested top-priority tourism initiatives:

- Fishing
- Birding/Wildlife Watching
- Agritourism
- Historical/Local Sightseeing

Sumter Fishing

According to the **2006** numbers from the **US Fish and Wildlife Service**, anglers spent over \$5 billion on equipment, nearly \$15 billion on fishing trips, and some \$20 billion on boats, trucks, licenses and other fishing related products and services – including \$290 million on ice alone!

Obviously, recreational fishing is big business. **The American Sportfishing Association** reports in its 2008 report that fishing in the USA generates more than \$125 billion in economic output and sustains more than 1 million jobs in America and 80,000 in Florida. If sport fishing were a Corporation, it would rank above Target, Sears and, Johnson and Johnson on the Fortune 500 list of largest American companies

In Florida, according to the **2006 National Survey of Fishing, Hunting and Wildlife of the US Fish and Wildlife Service**, 2,767,000 residents and nonresidents expended over \$4.3 billion of the nation's total \$125 billion on fishing trips and equipment, averaging \$1,536 per angler, with each devoting an average of 17 days per year practicing their Florida sport. This data makes fishing in Florida the most attractive tourism segment in ecotourism based both on overall participation and financial expenditures.

The Florida Fish and Wildlife Conservation Commission (FWCC) website reports, Florida fishing is ranked number one nationally in overall economic impact; nonresident economic output; number of anglers; nonresident anglers; retail sales; fishing dependent jobs; and salaries and wages.

Sumter County, with 56 fishable lakes, rivers and ponds according to fishingworks.com, the number one sport fish is the Florida Largemouth Bass. The bass is genetically unique to Florida, known to grow bigger and faster here than in the North. High-value of access to Largemouth Bass tracks the dedicated Bass angler, who fishes an average of 15 million days per year, outranking its Marine competition, redfish at 6 million days per year. The FWCC reports Bass anglers spent approximately 1.25 billion fishing in Florida.

Visit Florida currently lists eight other counties as the prime areas for tourism visitation for fishing in the state of Florida. Sumter County has excellent natural resources, more than 8 million residents within 150 miles and the major tourist access road through Florida (Interstate 75) at its doorstep, but to produce a long-term sustainable tourism fishing program success, it must enhance the quality of the fishing stocking and biological management, enhance the quality of support facilities, enhance countywide signage, create unique fishing events and packages, and promote and market the product.

The Sumter County visitor industry currently hosts 4-8 competitive bass fishing tournaments annually, and with augmented promotional support has potential to attract hundreds of additional anglers and participating family groups. Competitive fishing tournaments not only attract local and national anglers, but also attract regional and national publicity, including coverage by such as ESPN TV and newspaper and magazine columnists.

Fishing as an industry is not only a dynamic economic benefit to our Sumter County communities, but it is an ecological, quality-of-life issue. Anglers have a vested interest in maintaining fish habitat and water quality. A healthy natural environment and improved quality of life for all residents and visitors is a collateral advantage of recreational fishing in Sumter County. Furthermore, executives of The Villages indicate their annual resident interest survey lists "recreational fishing" as the activity with the highest priority response. Whenever a proposed tourism activity also meets resident desire, the activity has a double return on investment.

Tourism Program Evaluation: Fishing Correlation Checklist

1) Is the fishing tourism program supported by national data? - Yes

- a. 2006 US Fish and Wildlife Service reports last year that anglers spent \$5 billion on equipment, nearly \$15 billion on fishing trips, \$20 billion on boats, trucks, licenses and other related products and services.
- b. American Sportfishing Association notes that more than 1 million jobs in America and 80,000 jobs in Florida are supported by recreational fishing.
- c. American Sportfishing Association reports that if sport fishing were a corporation on the stock exchange, it would rank above Target, Sears, and Johnson & Johnson.

2) Is the fishing tourism program supported by statewide data? - Yes

- a. In the 2006 US Fish and Wildlife Service report, in Florida, 2,767,000 residents and nonresidents spent more than \$4.3 billion on fishing trips and equipment, averaging \$1536 per angler and the average angler in Florida spent more than 17 days per year practicing their sport.

3) Does Sumter County have the resources/facilities to support a fishing tourism program? - Yes

- a. According to fishingworks.com Sumter County has 56 fishable lakes, rivers and ponds. Not all of the public fishing areas have full angler access and modern support facilities. Both ongoing biologic maintenance and stocking programs are needed to enhance the number and size of available sport fish species. Sumter County enjoys many long-term fishing businesses, fishing camps and professional guides. Sumter County has a strong regional tourist base of more than 8 million residents within 150 miles.

4) Would a Sumter County fishing tourism program support the sale of hotel rooms and collateral local business? - Yes

- a. 2006 U.S. Fish and Wildlife Service report that anglers in Florida spent \$4.3 billion on fishing trips and equipment. Of all the ecotourism activities, fishing has the highest number of participants and the highest level of statewide spending.

5) Would either operating or capital expenditures on a Sumter County fishing tourism program meet the state requirements for tourist tax expenditures and County policies? - Yes

6) Does Sumter County have a current competitive edge in fishing tourism programs? - No

- a. Visit Florida currently lists eight other counties as the prime areas for tourism visitation for fishing in the state of Florida. Sumter County has excellent natural resources, more than 8 million residents within 150 miles and the major tourist access road through Florida (Interstate 75) at its doorstep, but to produce a long-term sustainable tourism fishing program success, it must enhance the quality of the fishing stocking and biological management, enhance the quality of support facilities, enhance countywide signage, create unique fishing events and packages, and promote and market the product.

7) Is a tourism fishing program consistent with Sumter County's strategic economic development plan? - Yes

- a. It is a high core priority of future development that the open space, rural and recreational opportunities of Sumter County always be protected and improved.

8) Is there evidence of existing business and residents support for the fishing tourism program? - Yes

- a. As reported in other parts of this Tourism Plan, the fishing program received strong positive recommendations by the Tourist Development Council, the Board of County Commissioners, the stakeholders focus group which met on November 8, 2010, the survey of stakeholders and input from the Chamber of Commerce and The Villages resident survey.



Birding/Wildlife Watching

Bird and Wildlife watching has strong draw and appeal to high income households. **The Pullis La Roche Study (2006)** confirms that more than one quarter of the individuals who live in households earning one hundred thousand dollars or more annually, participate in bird watching.

The **US Fish and Wildlife Service National Survey of Fishing, Hunting, and Wildlife-Associated Recreation (2006)** reveals that 19.8 million US residents traveled away from home to view birds, and over 71 million Americans spent nearly \$45 billion (in retail sales) on observing, feeding, or watching wildlife in the US in 2006.

Using a broader definition of Birding, the **National Survey on Recreation and the Environment, NSRE (2007)** states that people who view, photograph, study, identify, or otherwise take interest in wild birds in the outdoors, no matter how often, or whether it was the primary activity, 81.1 million Americans participate in birding; roughly 35.4% of the population.

The 2006 Florida Wildlife Study reports 4,240,000 residents and non-residents in Florida spent more than 16,551,000 days wildlife watching, with trip-related expenditures totaling \$887,942,000 per year, and an average participant expenditure of \$720.

Furthermore, according to the **2006 National Survey of Fishing, Hunting, and Wildlife-Associated Recreation**, \$299,255,610 was spent in Florida on lodging alone, (\$62,955,541 by residents and another \$236,300,069 by nonresidents), with an additional \$265,920,896 spent on food.

Birding and wildlife watching fits a variety of travel budgets and requires minimal equipment, primarily the best affordable pair of binoculars. Watchers choose sites that are rich in bird and other wildlife. Parks and water based features are ideal, with lakes, rivers and forests abundant in Sumter County.

Neighboring Titusville is called the "Capital of the Birding Nation," where more than 4,500 "birders" participated in the 2011 Titusville six-day Space Coast Birding and Wildlife Festival. A recent study reported their festival brought an economic impact of more than \$950,000. This success is the basis for more, new eco-festivals, such as the Florida Scrub Jay Festival and the Titusville Sea Turtle Festival.

Sumter County's popular Great Florida Birding Trail begins at the Great Green Swamp, site of the Richloam State Fish Hatchery. Sumter County eco-experiences at this site would put a unique spotlight on local eco-tourism offerings and nature-based experiences. Lake Panasoffkee's 25 miles of shoreline is another ideal site for birding festivals. These "EcoAdvantages" are significant economic benefits that also attract outdoor writers and media representatives looking to feature Sumter's nature themed, bird and wildlife visitor attractions.



Tourism Program Evaluation: Birding/Wildlife Correlation Checklist

1) Is the birding/wildlife watching tourism program supported by national data? - Yes

- a. 19.8 Million US residents traveled away from home to view birds
- b. 71 million Americans spent nearly \$45 billion (in retail sales) on observing, feeding, or watching wildlife in the US in 2006

2) Is the birding/wildlife watching tourism program supported by statewide data? - Yes

- a. The 2006 Florida Wildlife Study reports 4,240,000 residents and non-residents in Florida spent more than 16,551,000 days wildlife watching
- b. Florida ranks as the second highest state (after California) in the number of people participating in wildlife viewing recreation
- c. In 2006, 746,000 nonresident wildlife viewers in Florida brought \$653 million into the state economy

3) Does Sumter County have the resources/facilities to support a birding/wildlife watching tourism program? - Yes

- a. Sumter County's popular Great Florida Birding Trail begins at the Great Green Swamp, site of the Richloam State Fish Hatchery
- b. Lake Panasoffkee's 25 miles of shoreline is another ideal site for birding festivals

4) Would a Sumter County birding/wildlife watching tourism program support the sale of hotel rooms and collateral local business? - Yes

- a. The 2006 Florida Wildlife Study reports 4,240,000 residents and non-residents in Florida had trip-related expenditures totaling \$887,942,000 per year, with an average participant expenditure of \$720
- b. According to the 2006 National Survey of Fishing, Hunting, and Wildlife-Associated Recreation, \$299,255,610 was spent in Florida on lodging alone; \$62,955,541 by residents and another \$236,300,069 by nonresidents, with an additional \$265,920,896 spent on food.

5) Would operating or capital expenditures on a Sumter County birding/wildlife watching tourism program meet the state requirements for tourist tax expenditures and County policies? - Yes

6) Does Sumter County have a current competitive edge in birding/wildlife watching tourism programs? - No

- a. Neighboring Titusville is called the "Capital of the Birding Nation," where more than 4,500 "birders" participated in the 2011 Titusville six-day Space Coast Birding and Wildlife Festival

7) Is a tourism birding/wildlife watching program consistent with Sumter County's strategic economic development plan? - Yes

- a. Ecotourism is a core strategy of the approved Sumter County Economic Development Plan.

8) Is there evidence of existing businesses' and residents' support for the birding/wildlife watching tourism program? - Yes

Agritourism

Sumter County is the location of 837 farms with 160,000 acres of delicious product production worth more than \$35 million annually. Here you'll share more than 35,000 cows, 2,300 horses, and a thousand goats. (Sumter has nearly 400 full-time and 470 part-time farmers. The opportunities to taste, to select, to learn how it's grown, to take home the best, is all right here in Sumter County - Sumter, where thoroughbred farming began - "The Stringbean Capital of the World," "The Cabbage Capital," and "the Cucumber Capital of the World."

Sumter farms produce more than 35 different fruits and vegetables, such as sweet corn, grapes, blueberries, watermelons, pecans, avocados, carrots, lettuce and cucumbers.

Tourism and agriculture are the top two industries in Florida. Agritourism may be the best opportunity to combine the strengths of both industries. Florida is agriculture based, 24 million acres, with 47,500 individual farms averaging 195 acres per farm. Agritourism outlines an approach of using the farm or ranch to attract visitors for the purpose of education, recreation, or active involvement in farm life.

The University of Florida extension identifies that the **Cornell University Telephone Study (2008)** found more than half the farms that hosted tourism activities at least "1500 visitors per year., 28% had 1500-- 5000 visitors per year and 20% had more than 7000 visitors per year." The highest percentage of visitors were children and young families (a specific target market for tourism attraction).

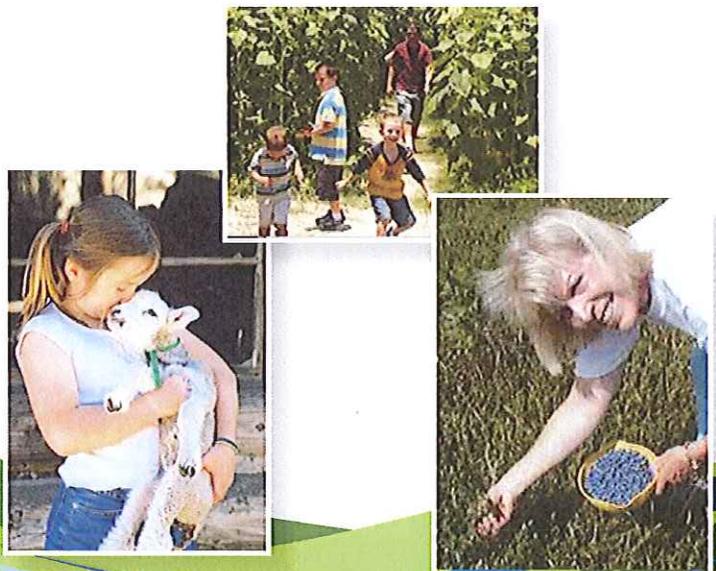
Agritourism activities can also benefit related environmental and wildlife activities as indicated in the **Guiliano and Thomas Study of 2005** which found that bird watching, wildlife viewing, wildlife photography and

fishing were all enhanced by agritourism activities. Agritourism activities may be quite varied from-eco-safaris, day and overnight experiences on working farms, herb farming, regional cooking instruction, hay mazes and water-based recreational activities.

According the economic impacts of agritourism in the **University of Florida Study, Potential Impacts of Agritourism in South Miami-Dade County (2006)**, the state of Vermont annual income in 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 also 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 visit the Everglades in 2005. Since each dollar spent by tourists has 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 indirect business taxes to state and local governments.

With all the positive news surrounding the popularity and success of agritourism, and given the newly emerging direction of the county and the Agricultural Alliance, Sumter County is in a prime position to capitalize on this market.



Tourism Program Evaluation: Agritourism Correlation Checklist

1) Is the agritourism program supported by national data? – Yes

- a. According to the USDA (“Measuring the Economic Impact of Agritourism on Farms”), 23,350 farms had \$566 million in income from agritourism and recreational services in 2007
- b. According to the USDA, agritourism income for farms is the fastest-growing “new cash crop”. For example, agritourism in Illinois grew from \$2.8 million in 2002 to \$11.8 million in 2007. Agritourism in Minnesota grew from \$1.9 million in 2002 to \$7.8 million in 2007. Finally, agritourism in Wisconsin grew from \$1.9 million in 2002 to \$6.9 million in 2007.
- c. On a per farm basis, agritourism and recreational service income in Illinois grew from \$6000 per farm in 2002 to \$17,500 per farm in 2007. In Minnesota, income grew from \$4900 per farm in 2002 to \$21,500 in 2007 per farm. Finally, in Wisconsin, income grew from \$3800 per farm in 2002 to \$12,000 per farm in 2007.
- d. According to the National Survey on Recreation and the Environment 2004, “every year 63 million Americans travel an average of 80 miles to visit agritourism farms and are spending between \$5-\$50 per person in farm recreational activities (this travel average correlates well with our regional target of a 150 miles radius with more than 8 million residents)

2) Is the agritourism program supported by statewide data? - Yes

- a. The University of Florida 2010 study summarizes “given Florida’s proven success with tourism, favorable climate, abundant wildlife, and the diversity of farming products, Florida farms make great candidates for agritourism operations. It is time to bring Florida two economic engines (tourism and agriculture) together. In order to increase the value of farms and expanded array of recreational experience offered in Florida, many agricultural and tourism professionals are touting agritourism as one alternative for small and medium farming operations to generate additional income.”
- b. Agritourism is just emerging in Florida with the previous cited USDA survey indicating that average incomes for participating farms in Florida per year are currently less than \$2000 per farm. However, the distinct success in Florida as America’s largest travel destination with more than 90 million visits per year (and with more than 8 million residents within the 150 mile regional target market), the opportunity for growth and success is extremely strong. The juxtaposition of Sumter County being only 60 min. from the Orlando theme parks concentration offers an attractive one or two day “different experience” in agritourism for the theme park visitors.

3) Does Sumter County have the resources/facilities to support an agritourism program? - Yes

- a. Sumter County is home to 837 farms/ranches with more than 160,000 acres producing more than 35 different fruits, vegetables and cattle products that generate more than \$35 million in annual sales.

4) Would a Sumter County agritourism program support the sale of hotel rooms and collateral local business? - Yes

- a. Low hotel room sales initially but high level of support of collateral local business (see expenditure numbers previously cited)
- b. The USDA reports that the majority of agritourism visitors are day trip explorers that are 65% female, 35% male with an average of two children. 38% of these tourists visit a farm market 2 – 6 times per year, 37% of these tourists are between the ages of 35 – 49, are the principal food buyers for their households, and are moderate to high income urban families and mature/senior couples who enjoy spending quality time with family/partner. This data has extremely high correlation for-day trip visitors within the 150 mile regional target market and within Sumter County itself.
- c. Metro Dade County has had some positive results in growing the bed and breakfast part of agritourism by some relaxing of County ordinances plus offering encouragement for startup wineries and microbreweries to re-create the “Napa Valley experience”

5) Would either operating or capital expenditures on a Sumter County agritourism program meet the state requirements for tourist tax expenditures and County policies? - Yes

6) Does Sumter County have a current competitive edge in agritourism programs? - Yes

- a. The Sumter County’s Board of County Commissioners working in partnership with the newly formed Sumter County Agricultural Alliance offers the right organizational platform to capture this important emerging tourism market.
- b. Sumter County has 837 farms/ranches with more than 35 different fruits, vegetables and meat products strategically located within 150 miles of more than 8 million residents and 60 min. from the Orlando theme Park destination (which draws more out-of-state tourists than any other location in the United States). Interstate 75, the major south-bound highway for tourists borders the western boundary of Sumter County.
- c. Agritourism is also a strong connector to other tourism and related business market segments (such as fishing, kayaking, bird watching, hiking, swimming, camping, stargazing)

7) Is an agritourism program consistent with Sumter County’s Strategic Economic Development Plan? - Yes

- a. Approved in June of 2010, one of the two highest priorities is to “become an agricultural business and research cluster” to support and grow the agricultural industry within Sumter County.

8) Is there evidence of existing business and residents support for the agritourism program? - Yes

- a. As reported in other parts of the Tourism Plan, agritourism received positive recommendations by the Board of County Commissioners, the stakeholder’s focus group which met on November 8, 2010, the survey of stakeholders and input from the Chamber of Commerce. Most importantly, the newly formed Sumter County Agricultural Alliance has gathered together representation of all segments (of the 867 farms/ranches which represents more than \$35 million of annual product), and is working in partnership with Sumter County Board of County Commissioners.

Historical Sites

Sumter County has a special place in American History. We have several locations which assist us in remembering our heroes. Two such locations are the Florida National Cemetery, which honors our veterans, and Dade Battlefield Park. They both offer rich historical and cultural visitor attractions. Sumter celebrates its culture and history through a variety of public annual events. This is significant because according to Visit Florida 18% of tourists consider "sightseeing" or "touring" their primary activity. The Cemetery and Park produce annual events which bring returning tourists. Such annual events are significant because according to **Visit Florida's 2008 Florida Visitors Study** 84% of tourists are "frequent repeat visitors" who visit on an annual basis. As such, the more repeated events (Battlefield Reenactments or Memorial Day Ceremonies) the more likely tourists will revisit Sumter. There is also a derivative benefit since not only do they support the event but also contribute to secondary economies such as restaurants, hotels, and retail stores.

Cities: Seeing the Sights and Joining the Festivals

Sumter County has several unique communities. One may experience the old and new Florida in Sumter. Visit down-home Webster, site of one of the oldest cattle auctions and largest continuous flea markets in the country. Webster, like other communities, bring us back to how Sumter was decades ago during a time of a slower pace. Or visit The Villages, one of the most successful planned retirement communities 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 opportunity 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 who also attend a

festival and/or shop. Such shopping opportunities have significance in Tourism Planning. According to **Visit Florida's 2008 Florida Visitors Study** "shopping" is the number one (#1) primary activity of the typical in-state tourist. 30% of tourists have stated shopping as their primary purpose.

Sumter has unique communities which offer tourists an opportunity to browse, eat and shop. Sumter has several festivals or events for the Tourist to consider. For example, the Sumter County Farmers Market and Webster Flea Market. The Webster flea market is one of the oldest and most successful flea markets in the United States. Promotion and advertising assistance can help build on its past history of success, and expand its success throughout southern Sumter County.

There are also other festivals and events on the drawing board. For example, The Sumter County Chamber of Commerce is currently planning the first annual "Sumter County 2011 Beef & Boogie" which is the perfect Festival activity. It contains food, music, good times and showcasing opportunity of the cattle industry. This new Festival has the potential to become a mainstay festival activity drawing Sumter tourists for many years to come. Its initial success and rate of growth could both be increased by investment dollars to assist in advertising and promotion

Additionally, The Villages is now considering producing events with regional impact. Their current local activities and events are varied, exceptionally well produced and strongly promoted. If they decide to produce new regional events such as a "Renaissance Fair" or "Dragon boat races", they would be great opportunities to increase tourism through appropriate co-promotion.



**Recommended 2011-2012 Budget:
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,

e5solutions' 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.

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	593,403	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

Recommendations: Start-up Activities

Step 1:

- Create and deliver logo, branding and theme for Sumter County Tourism Marketing 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 calendar 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

Sources:

American Sportfishing Association Report (2008)
Cornell University Agritourism Telephone Study (2008)
The Counties of Marion, Lake, Polk, Pasco, Hernando and Citrus
D.K. Shifflet & Associates
Florida Department of Agriculture
Florida Fish and Wildlife Conservation Commission
 Economic Benefits of Wildlife-Viewing Recreation in Florida (2006)
 Florida Wildlife Study (2006)
Guiliano Thomas Study (2005)
International Ecotourism Society (2006)
The Orlando Convention and Visitors Bureau
Pullis LaRoche Study (2006)
U.S. Fish and Wildlife Service
 National Survey of Fishing, Hunting, and Wildlife-Associated Recreation (2006)
 National Survey on Recreation and the Environment, (2004 & 2007)
University of Florida
 Potential Impacts of Agritourism in South Miami-Dade County (2006)
USDA "Measuring the Economic Impact of Agritourism on Farms"
Visit Florida
 2010-2011 Destination Marketing Plan
 2008 Florida Visitors Study