


DESTINATION PROMOTION:

# EMPOWERING FLORIDA'S GROWTH



DESTINATIONS  
**FL**  **ORIDA**



An aerial view of a person in a bright yellow kayak paddling down a calm river. The river is surrounded by dense, lush green vegetation, including palm trees and various shrubs. The water is dark blue and reflects the surrounding greenery. The person is wearing a red shirt and a life vest, and is using a black paddle. A green rectangular box is overlaid on the upper part of the image, containing white text.

Destinations Florida serves as the single, unifying voice of Florida's destination marketing organizations and represents the interests of the state's local tourism promotion agencies working to promote their communities throughout the world.



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DESTINATION PROMOTION:

# EMPOWERING FLORIDA'S GROWTH





# ISSUE SUMMARY

Everyone agrees that tourism is important to our state. After all, tourism creates jobs and Florida's tourism industry is the key to our state's economy, both present and future. So, why do we need to keep talking about it? Florida's visitors have always contributed to a vibrant economy, putting more than one million people to work in hotels, restaurants, attractions, and other tourism-reliant companies. This paper presents how destination promotion is powering Florida's growth, in five sections:

## SECTION 1:

Tourism Makes  
the Great Life  
We Enjoy in  
Florida Possible

## SECTION 2:

Obstacles to  
Tourism  
Growth

## SECTION 3:

Common  
Misconceptions  
About Florida  
Tourism

## SECTION 4:

How Florida  
DMOs Attract  
More Visitors

## SECTION 5:

Priming the  
Pump on  
Florida's  
Economy







# EXECUTIVE SUMMARY

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Tourism is a major source of revenue for the state and local communities, and the industry is one of Florida's largest employers.

Floridians live in one of only seven states where residents do not pay a state income tax. They also enjoy a low tax base—a fact that has been touted nationwide as part of an effort to lure more businesses and residents to the Sunshine State. No state income tax and a low tax base are possible because of a healthy tourism industry that attracts visitors to the state.





According to Amy Baker, chief economist of the Florida Legislature's Office of Economic and Demographic Research (EDR), the most recent sales tax forecast relies heavily on strong tourism growth and tourism-related revenue losses pose the greatest potential risk to the state's economic outlook.

Tourism promotion is necessary to maintain the state's economic well-being and current tax structure. The revenue generated by Florida's visitors pays for programs and services utilized by residents at the state and local levels.

Without visitor spending, Florida residents would have to pay approximately \$1,500 more in state and local taxes each year just to maintain those same programs and services. The alternative would be for state and local elected officials to raise taxes on constituents in order to pay for those programs and services—or eliminate them altogether.

Even with tourism promotion, and more so without it, Florida's tourism industry faces certain obstacles and challenges that it must overcome.

An increasingly competitive business, tourism is a global industry and one that offers travelers more options than ever before. Potential visitors have many places with sunshine and beaches from which to choose. Today, Florida's tourism competitors have become more sophisticated and targeted in their marketing to showcase the options they can provide.

Another challenge to the industry lies in the misperceptions and misinformation that often follow a natural disaster, man-made disaster, viral outbreak, or violent event—all of which have occurred in Florida within the last decade. When a hurricane hits or red tide is present in a certain area of the state, tourism promotion agencies

must work overtime to battle mischaracterizations and misinformation that may dissuade potential visitors from coming to Florida.

Perhaps some of the biggest challenges Florida's tourism industry must overcome are a sense of complacency, the perception that tourism promotion is no longer necessary, and a lack of understanding about the role tourism promotion plays at the state and local levels.

We have seen the effects of shortsighted decisions to eliminate or reduce tourism promotion efforts in Colorado, Washington, and Pennsylvania, which resulted in major losses in state revenue and market share. The losses these states suffered show a direct correlation between tourism promotion efforts and state revenues.

There is a side to these losses that's not discussed: the impacts of decisions to eliminate or reduce tourism promotion on small and medium-sized destinations and their tourism-reliant businesses.

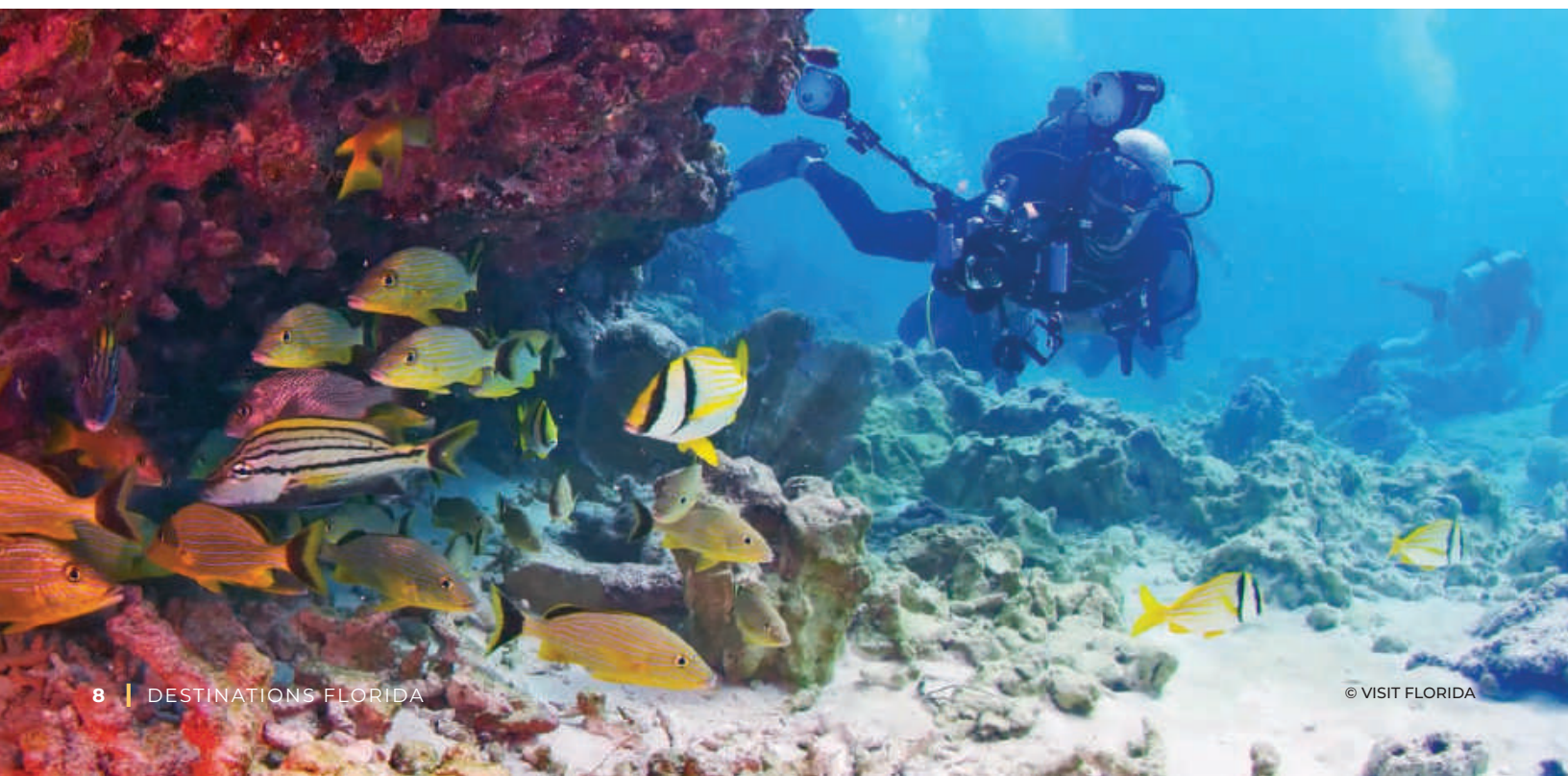
Here in Florida, we know how critical the combined efforts of state and local tourism promotion

programs are to these small and medium-sized markets and the businesses located within them.

Most small to medium-sized destinations, and their small-business partners, do not have the funding, resources, or expertise to promote themselves to potential visitors. Major metropolitan areas and large corporations may be able to, but not the majority of the small and medium-sized markets that compose most of Florida's tourism landscape.

When tourism in these areas suffer, so do the communities. Fewer visitors mean less funding to pay for critical services such as public safety, infrastructure, and education. Residents have to pay more in local taxes and there are fewer job opportunities, including those, such as hospitality, that foster employability skills attractive to employers in all industry sectors.

Any obstacles or challenges to tourism growth should be viewed as obstacles to the state's economic growth and well-being. The way to overcome those obstacles is through the support and continuation of state and local tourism promotion agencies and programs.







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Having a state tourism promotion agency, such as VISIT FLORIDA, enables the state to effectively promote the Florida brand more broadly on the national and international levels while supporting the state's small and medium-sized markets' efforts. At the same time, it is essential to conduct local tourism promotion efforts through a destination marketing organization (DMO), sometimes also called a convention and visitors bureau (CVB) or a tourist development council (TDC).

These organizations work to persuade potential visitors that their unique Florida destination is the right place for them to visit. DMOs create a brand for their destination and communicate one coherent message about that brand. Through coordination, they bring together a community's tourism-reliant businesses and use their expertise to promote their destination as a package. This is immensely important in areas of the tourism industry that are particularly fruitful to local

economies, including international visitors, convention and meeting bookings, and sports marketing.

To maintain a healthy economy, keep the tax base low, and preserve Floridians' quality of life, we must continue to invest in tourism promotion at the state and local levels.

At the state level, we must reauthorize and fully fund VISIT FLORIDA. At the local level, we must protect the funding sources of local tourism promotion agencies by not making any changes to the current permissible uses of visitor-paid Tourist Development Taxes.

Florida's sales tax forecast relies heavily on strong tourism growth, and strong tourism growth relies on effective tourism promotion. ✨



## SECTION 1



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**TOURISM MAKES  
THE GREAT LIFE WE  
ENJOY IN FLORIDA  
POSSIBLE**



Florida residents do not pay a state income tax, thanks, in part, to the sales tax revenue generated by visitors to the state. Tourism promotion helps keep the tax base low for Florida residents because the more visitors we have, the more sales tax is generated. Much of the state's services and infrastructure are made possible by the tax dollars coming in from tourism. This funding includes the sales tax on direct spending by visitors, as well as property taxes paid by restaurants, hotels, and other tourism-reliant businesses that own real property; taxes paid by businesses that come into Florida because of our low tax base; and sales tax paid by an increasing number of people who move to Florida.

According to the Florida Legislature's Office of Economic and Demographic Research (EDR) and Florida's chief economist, Amy Baker, more than \$3 billion in annual sales tax revenue is generated by visitors to the state.<sup>1</sup> These dollars help pay for programs and services provided for in our state budget. Without tourism and tourism promotion, the state would have to raise taxes on residents or reduce or cease to provide vital services. Without tourism and tourism promotion, every Florida household would have to pay an additional \$1,512 in taxes each year just to maintain the current level of services.<sup>2</sup>

Tourism also generates local tax dollars. In 2016, out-of-state visitors alone generated nearly \$5.5 billion in local tax revenues that support our communities.<sup>3</sup> Those dollars are used by local communities to fund schools and public safety, to build and maintain infrastructure projects, to protect the environment, and to support local arts and culture.

Florida needs visitor-generated sales tax revenue to maintain its current tax structure, to keep taxes low for residents, and to continue to offer existing programs and services. According to the EDR, the

most recent sales tax forecast relies heavily on strong tourism growth.<sup>4</sup> This forecast assumes that no events having significant repercussions affecting tourism will occur during the forecast window;

however, this research demonstrates that tourism-related revenue losses pose the greatest potential risk to the economic outlook. Previous economic studies of disease outbreaks and natural or man-made disasters have shown that tourism demand is very sensitive to such events.<sup>5</sup> This is particularly critical as

the state is staring down an economic forecast that includes two years of budget shortfalls following the 2020-2021 fiscal year.<sup>6</sup>

In a speech following his election to Florida House speaker-designate, Representative Chris Sprowls said, "Florida is a destination—a place where people want to be; a place where they want to visit, want to work, and want to live."<sup>7</sup> While this statement is true, visitors will not automatically come to visit the state and then decide to make it their home. In order for Florida to be a destination where people want to visit, work, and live, we must intentionally promote the many reasons why Florida is not only an exceptional place to visit, but also to live.

**\$3B**  
**ANNUAL**  
**SALES TAX**  
**REVENUE**



Florida's tourism industry is a driver of Florida's growth. Every family's relocation starts with at least one visit to Florida, bringing state and local funding with it in the form of tax revenue. Florida's tourism industry draws technology businesses to the state because the demand for new technology is an integral part of the operation of so many tourism-reliant businesses and companies. Florida's tax structure, which is made possible through a strong state tourism industry, draws more business to the state, fueling healthy competition and a vibrant free market. In order for Florida to be a leader in domestic migration, we need to maintain the current tourism-reliant tax structure and policies that are drawing visitors and potential residents to our state.

Between April 1, 2018, and April 1, 2024, population growth is expected to average 330,605 net new residents per year, representing a compound growth rate of 1.53 percent over this six-year time horizon. This means we will have approximately 900 new residents coming into Florida each day.<sup>8</sup>







© VISIT FLORIDA

More people will require more tax revenue to support services to communities and to provide more work opportunities. Having no state income tax and a low tax base makes Florida an attractive option for businesses looking to relocate or to establish themselves here. Since tourism supports this tax structure, Florida can be a strong player in the global economic development arena so that state government doesn't need to invest in controversial incentive programs that pick corporate winners and losers. More businesses moving into and starting up in the state will lead to a strong economy, as well as more and better employment options for Floridians.✱



**Tourism promotion  
makes all this possible.**



## SECTION 2



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# OBSTACLES TO TOURISM GROWTH



Even though Florida is well regarded as a premium tourism destination, we still face serious obstacles to getting visitors to come here. These obstacles fall into two main categories: competition and misinformation/misperceptions.

## COMPETITION

Travel is a global industry and it's incredibly competitive. Potential visitors have many options available to them, including other locations with beautiful beaches and year-round sunshine such as California, Mexico, and the Caribbean. Potential visitors can easily choose these other options over Florida.

About 112 million visitors come to Florida each year, and we tend to think of them as one huge market. The fact is, our visitors comprise several hundred different smaller markets that each require targeted marketing messages to attract them to come here. The demographics range from families in the Midwest who have saved for years to make their one family vacation to Florida, to New Yorkers and other snowbirds who make a trip to the Sunshine State an annual ritual to get away from their cold winters, to wealthy international visitors in South America, the United Kingdom, Europe, Asia, and the Middle East who see Florida as just one of the many beach destinations they have the opportunity to visit.

It is crucial that we have an organized tourism promotion approach for each of these markets because our competitors already do. Mexico is

trying to compete with Florida in the Midwestern family market. They are also trying to compete in the New York City winter getaway market. And they are using their beaches, their hospitality, and frankly, their less expensive pricing to lure

visitors to fly over Florida. In addition, more than 50 Caribbean destinations are all competing in the U.S. domestic market, not to mention the many attractions families can visit in and around their own communities. For example, Hershey, Pennsylvania,

promotes itself as a summer family destination, and a visit to “the place where they make chocolate” competes with a family vacation in Florida as much as the Caribbean does.

International visitors from Europe and Asia view Florida as a premium destination to visit. They have easy and economical access to nearby beaches in Spain or Turkey, for example, or they might choose an even less expensive vacation in the Middle East because the governments in those countries subsidize flights. Florida is competing internationally with the many governments that want the tax revenue and the job stimulus that come from tourists visiting their destinations, staying in hotels, and visiting their attractions.





In addition to providing incentives to visitors by subsidizing flights, these governments also subsidize tourism marketing in order to bring visitors to their communities instead of Florida.

International visitors pay more to come to Florida, and this requires coordinated and targeted marketing to specific audiences to encourage them to visit here. For example, in Brazil, as part of a coming of age ritual for their children, the family gets to go on a vacation and where the children aspire to visit determines where the family goes. Those children won't know that Florida exists

unless we tell them how wonderful it can be to take a family vacation here.

Other demographics require different messaging. For example, single travelers, couples with no children, and older couples won't respond to family vacation messaging. Sports enthusiasts are looking for sports-related reasons to visit a destination. Whatever the demographic, you can be sure that our competitors both within and outside of the United States are sending targeted messages about why those visitors should choose a competitor's location over Florida. Competition for tourists is fierce.

## MISINFORMATION/MISPERCEPTIONS

Another obstacle Florida faces in our efforts to market our state to visitors is misinformation or misperceptions that follow shootings and other violent events or natural disasters such as hurricanes, the Zika virus outbreak, red tide, green/blue algae, and oil spills. Potential visitors see sensationalized news coverage of Florida following a hurricane or other natural disaster, many times accompanied by alarming images, and are led to believe that Florida's destinations are no longer attractive travel locations or they may think an entire area of the state is no longer open for business. Here are a few examples:

### HURRICANE MICHAEL

- From a *New York Times* article: "There's no infrastructure that a tourist would want or need for this winter. There's no restaurants, the mom-and-pop shops are virtually all gone, so if I'm a tourist, as much as I love Mexico Beach, I wouldn't go there."<sup>9</sup>

### GREEN/BLUE ALGAE AND RED TIDE

- *Bloomberg Businessweek* headline: "Toxic Slime Is Ruining Florida's Gulf Coast"<sup>10</sup>
- CNN headline: "Florida's toxic algae problem and your health: 'Red tide' and 'green slime'"<sup>11</sup>

### DEEPWATER HORIZON OIL SPILL

- Reuters headline: "Florida coast suffers first impact from oil spill"; from the article: "It's pretty sad because we go here on vacation every summer, and now we won't be able to go anymore. I just can't believe it, because it used to be all just white sand," one visitor, Grace Vondohlen, said.<sup>12</sup>





© Suwannee County Tourist Development Council

When disasters occur, Florida needs to work overtime to correct misinformation in the media and the misperceptions our potential visitors might have about how bad or widespread the problem is. We can't do that without a coordinated, organized effort to communicate the facts, not only through the media, but directly to potential visitors and to the visitors already here so they know that Florida is still a great place to be. As stated earlier, economic studies show that tourism is very sensitive to news about disease outbreaks and natural and man-made disasters (see note 4), and tourism marketers have an important role to play in making sure visitors have correct and timely information to make travel decisions for themselves and their families.

People who live outside of Florida do not necessarily understand the geography of our

state. When a hurricane hits in North Florida, for example, visitors see the video of devastated coastal towns and assume all of Florida is out of consideration for their next beach vacation. Of course, Florida has hundreds of miles of coastline, and one job of tourism marketers after a hurricane is to ensure visitors know they have many options in Florida for their beach vacation. Another job is to send continual updates about the areas that were affected by a storm because our coastal towns are resilient, and many hotels, restaurants, and attractions are up and running quite quickly.

While tourism is an important economic driver in the state of Florida, two things are eroding and destroying that driver: competition and misinformation/misperceptions. These two obstacles are taking away visitors while the tourism promotion industry is trying to attract more of them. 🌟



## SECTION 3

# COMMON MISCONCEPTIONS





While most Floridians agree that visitors drive Florida's economy, some common misconceptions exist about how Florida attracts visitors and the role of communities and the state in attracting visitors to create demand for tourism-reliant jobs. In this section, we will explore lessons learned from other states.

### MISCONCEPTION #1:

#### FLORIDA DOESN'T NEED ADVERTISING. PEOPLE WILL COME NO MATTER WHAT.

Colorado experimented with this misconception, with disastrous results:

##### From *The Rise and Fall of Colorado Tourism* report:

"In 1993, Colorado became the only state to eliminate its tourism marketing function, when it cut its \$12 million promotion budget to zero. As a result, Colorado's domestic market share plunged 30 percent within two years, representing a loss of over \$1.4 billion in tourism revenue annually. Over time, the revenue loss increased to well over \$2 billion yearly. In the important summer resort segment, Colorado dropped from first place among states to 17<sup>th</sup>."<sup>13</sup>



##### From a U.S. Travel Association report:

"Visitor spending fell dramatically, creating an immediate loss in total revenues of \$1.4 billion, which increased to \$2.4 billion annually by the late 1990s; as a consequence, state and local tax receipts dropped by \$134 million between 1993 and 1997."<sup>14</sup>



Realizing the mistake it had made, in 2000, the state of Colorado opened the Colorado Tourism Office with a \$5 million annual budget. Here are the results:

**Denver Post headline in 2008: “Tourism grows in Colorado”; from the article:**

- “Colorado tourism has regained its momentum after a detour 15 years ago knocked it off track. A renewed effort to advertise the state with funds committed for that purpose has helped propel the state’s tourism industry back to its pre-detour levels.”
- “For the first time, the number of visitors to Colorado has surpassed a 1992 record set shortly before state funding for advertising was slashed.”
- “Though tourism funding was restarted in 2000, it has taken the state nearly eight years to regain the market share that was lost—both in number of trips and in tourism dollars spent in the state.”<sup>15</sup>

**The Durango Herald headline in 2016: “Increased Colorado tourism attributed to national marketing”; from the article:**

- “The Colorado Tourism Office credits its national marketing campaign for a 34.2 percent increase in overall traveler spending in 2015 and an increase in spending from visitors outside the West.”
- “This is some of the best and most positive evidence we’ve seen that increased media budgets and a concerted strategy can yield the desired results,” said Cathy Ritter, director of the Colorado Tourism Office.”<sup>16</sup>



Today it is difficult to appreciate the impact this misconception had on Colorado. Prior to 1993, however, the Colorado brand was synonymous with ski vacations, and destinations such as Aspen and Vail dominated U.S. market share. This misjudgment by Colorado lawmakers was exactly the opportunity that states like Utah needed to establish themselves as premium ski destinations, and it took Colorado years to regain its tourism footing.





Colorado is not the only state that thought “people will come no matter what.” Let’s take a look at Washington State. The following information comes from the previously cited report by the U.S. Travel Association, “What’s at Stake When Destinations Stop Marketing.”<sup>17</sup>

- In 2011, Washington completely shut down its state tourism promotion office.
- Washington’s neighbors increased their promotion budgets, including a 30 percent increase in Montana. Traveler spending in Montana grew 70 percent faster than in Washington State.
- With zero state support, the travel industry has tried to fill the void by creating the Washington Tourism Alliance (WTA)—a group formed by industry stakeholders to keep alive some critical tourism programs. The WTA’s limited budget enables it to keep up the state’s tourism website and app, as well as publish the annual visitors’ guides. Despite these efforts, Washington State’s tourism continues to fall behind that of other states in the region.

While private companies can do some good by pooling their efforts to advertise their destinations and services, WTA shows that the positive effects are limited. The simple reason is their efforts are not coordinated to benefit the entire state. The members of organizations like these do not have the viewpoint of looking beyond the benefits to their own organizations. There is only so much groups like these can do to help promote tourism to their state without public funds and a coordinated statewide vision behind them.

Pennsylvania also experimented with cutting its tourism promotion budget. Again, citing the U.S. Travel Association report:<sup>18</sup>

- Tourism funding fell from \$30 million in Fiscal Year 2008-2009 to only \$7 million in Fiscal Year 2014-2015—a 77 percent decrease.
- Between 2009 and 2014, the state lost more than \$600 million in state and local tax revenue that travelers would have generated had promotion been sustained.
- Between 2010 and 2014, national direct travel spending increased 24 percent, and state and local tax revenues increased 22 percent across all 50 states. Yet during this period, travel spending and state and local tax revenues increased by only 17 percent in Pennsylvania.
- Since 2007, overseas visitors to the United States increased by 44 percent, compared to just 19 percent in Pennsylvania.

Pennsylvania’s experience underscores what happens when a state stops prioritizing tourism promotion in its budget. The state loses money at the state level, and local tax authorities lose money at the city and/or county level.

**It may seem impossible for another brand to steal market share from Florida; nonetheless, other states and several countries are promoting themselves every day in an effort to steal visitors away from Florida. It’s crucial that Florida continues to compete to win!**

## MISCONCEPTION #2:

### IT'S SO LITTLE MONEY COMPARED TO PRIVATE ENTERPRISE; HOW COULD IT HAVE AN IMPACT?

It has been said that “in Florida’s trillion-dollar economy, a few million dollars put toward advertising a few different places cannot possibly have a direct correlation to tourism ... the types of attractions that exist here in Florida, the weather—there’s a whole series of factors. VISIT FLORIDA is probably least among them.”

The reality is that these “few million dollars” have huge impacts for small and medium-sized destinations and the tourism-reliant businesses in those destinations. In fact, according to the Florida Legislature’s chief economist, every \$1 invested in VISIT FLORIDA yields a \$2.15 return on investment to Florida’s taxpayers.<sup>19</sup>

The larger tourism players have the resources to market themselves. But the 10,000 or so smaller tourism-reliant businesses in our state, businesses that employ a large percentage of the Floridians who work within the tourism industry, do not have the resources or sometimes the requisite marketing skills to adequately promote the great services they provide to their customers. They may not be as sophisticated in negotiating deals with the various media providers around the country and around the world. They may not have as much experience using Facebook and other social media ads, and they could waste a lot of money on ads or marketing that is not going to generate visitors for their community or the state of Florida.

When we have a team of people who come together in order to promote the state of Florida and they are able to select markets, focus on audiences, and then work on a cooperative basis with members of the industry, then every stakeholder is able to grow.

The investments made for marketing are more effective and they are maximized because they are being paired with other dollars. Everyone benefits by working together versus each business working in its own silo.

State funds are especially critical for helping communities communicate and promote themselves following natural disasters or

environmental crises. Here is an example of how designated tourism promotion dollars helped Collier County keep visitors coming to Naples, Marco Island, and the Everglades in the wake of sensationalized reports about red tide on Florida’s Gulf Coast:

Using its emergency marketing funds and VISIT FLORIDA grant

dollars, the Naples, Marco Island, Everglades Convention and Visitors Bureau (the CVB) developed a campaign to overcome misinformation put out by national media about red tide on Florida’s Gulf Coast. News reports made it sound as if the entire region was suffering from the effects of red tide, with photos of dead fish featured prominently in TV, newspaper, and other reports. The CVB was able to communicate accurate, up-to-date information, and a regional grant from VISIT FLORIDA helped the area’s tourism partners to get improved listings on Google so that their customers could be better informed that they were open and welcoming visitors.

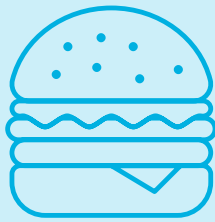
The results speak for themselves: There were no significant cancellations or drops in the Tourist Development Tax in Collier County during the red tide event.





**Here are two more examples of how destination marketing dollars were put to good use after a natural disaster:**

The Sand Dollar Café in Port St. Joe is a small local eatery in a Hurricane Michael-impacted community. This restaurant was included in a post-hurricane recovery marketing effort launched by the Gulf County Tourist Development Council (the TDC). The owner and his restaurant were included in an ad that was promoted outside of Florida, and the co-owner received a call from his friends in Atlanta to tell him they saw him and his business on TV in the Atlanta market. The ad helped the owner and his restaurant immensely. The Sand Dollar Café regained all its business in 2019 and saw a season as busy, if not busier, as before the storm. None of this could have happened without the help of the TDC because the restaurant's business comes mainly by word of mouth.



VISIT FLORIDA partners with DMOs that don't have the financial resources to market their regions on their own, especially if a region has been hit with a natural disaster. VISIT FLORIDA offers several grant opportunities, recognizing that marketing specific regions and what they have to offer is vital for local communities and in turn, all of Florida.<sup>20</sup> Here is an example:

Destination Panama City launched a post-hurricane recovery campaign, *Postcards from Panama City*, which sought to keep the region relevant to visitors while the region was recovering. The campaign was a mix of direct mail and social media, effectively using photo assets the DMO already had on hand. Since the hurricane had wiped out many of the other resources Destination Panama City needed to be successful with this campaign, the DMO received a grant from VISIT FLORIDA, which helped fund the direct mailer portion of the campaign.







© Weeki Wachee Springs State Park, Blue Spring Waters River

### **MISCONCEPTION #3: BUSINESSES CAN MARKET THEMSELVES.**

While larger companies can afford to market themselves, small and medium-sized businesses cannot. Without the assistance of state and local tourism promotion programs, small tourism-reliant businesses would not have the time, resources, or dollars to promote themselves and would lose entire sectors of customers and potential customers. Here's an example:

NJoy Spirits Distillery in Weeki Wachee is one of Florida's first craft distilleries. This very small business, owned by a husband and wife, works with a modest budget to market the distillery as an agri-tourism business, which is why the couple relies heavily on support from local and state tourism promotion efforts.

This mom and pop company didn't have the funds to purchase much-needed signage to engage visitors traveling on U.S. Highway 19. With a VISIT FLORIDA grant obtained with the help of the area's destination marketing organization, Florida's Adventure Coast, Brooksville-Weeki Wachee, NJoy Spirits Distillery was able to purchase signage to attract visitors and direct them to its location. The remaining grant dollars enabled the business owners to produce a short video to use in their tasting room, to create print brochures, and to advertise on social media.



**The results? Since NJoy Spirits Distillery received that help, visitation has quadrupled and 95 percent of visitors say they plan to return.**



#### MISCONCEPTION #4:

### THE MONEY BEING SPENT ON TOURISM DOES NOT HAVE A DIRECT CORRELATION TO INCREASED TOURISM.

It has been said that fluctuations in the funding of VISIT FLORIDA do not correlate to fluctuations in tourism to the state. But the statistics don't bear this out. When state tourism promotion funding is eliminated or decreased, market share is lost, visitors decrease, and tax funds are lost, as we have seen in the case studies of Colorado, Washington State, and Pennsylvania. When funding decreased, market share decreased. And when tourism promotion was reinstated, as it was in Colorado, for example, market share returned over time and visitation eventually reached record levels. This is the result of tourism promotion. There is a direct link between tourism promotion and a healthy tourism industry, according to Florida TaxWatch:

#### **From TaxWatch Top Issues:**

"Visitors to Florida have had periods of slower growth and reductions over the past 30 years, but as VISIT FLORIDA's budget climbed in the last 6 years, the number of visitors to the state has skyrocketed, surpassing the 100 million visitor milestone in 2015."<sup>21</sup>

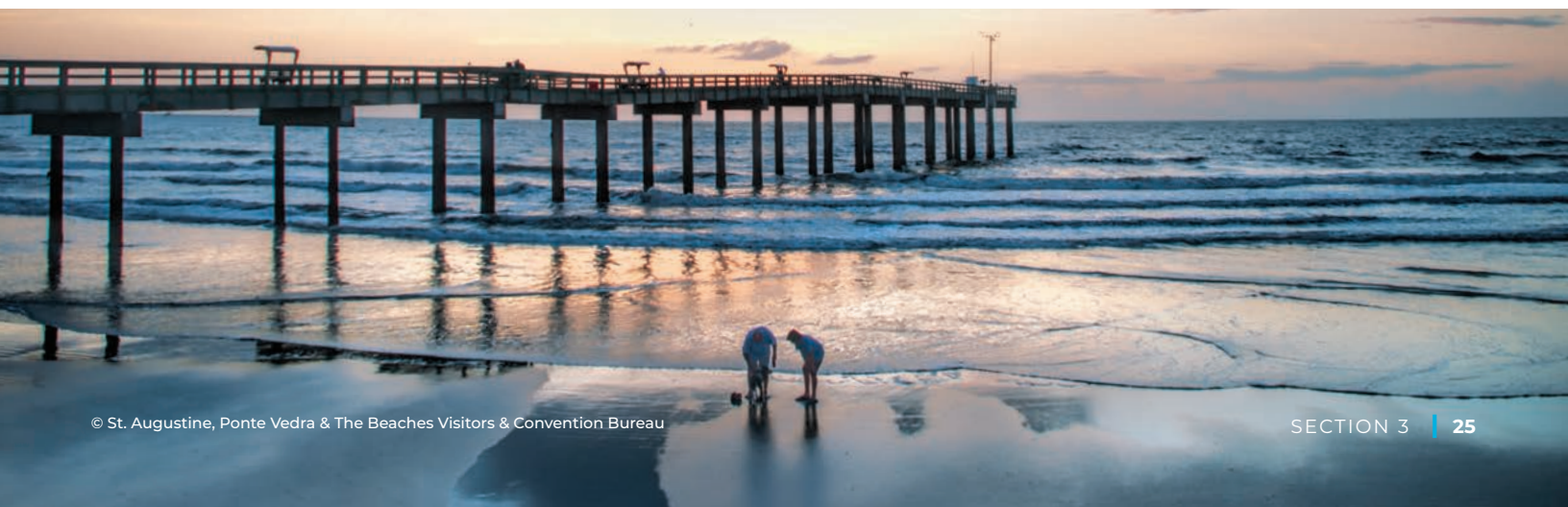
Tourism promotion also has an important environmental impact, which in turn has a direct correlation to Florida's economy. Florida House Speaker-designate Chris Sprowls recently said

that "Florida's prosperity is inextricably tied to our environment. Our beaches and our water are among our state's chief economic assets, and as the trustees of our state, we have an obligation to protect and enhance those assets."<sup>22</sup>

The sales tax revenue and the Tourist Development Tax funding generated by tourism makes a significant impact on preserving Florida's environment. For example, when Hurricane Matthew moved up the northeast coast of Florida, Jacksonville Beach lost 80 percent of its sand dunes. Not only are the dunes part of the beauty of this area, but they are also a major protection against coastal flooding. Visitors help to provide direct funding to restore beaches and sand dunes, both after storms and for regular maintenance to mediate natural erosion. If visitors aren't paying for it, then it will be the residents who must pay for it.

#### **From Florida Tourism cited by a Florida Climate Institute report:**

"It is estimated that each state dollar spent on the protection of Florida's public access beaches prevents the loss of \$8 in state taxes paid by out-of-state tourists and resident users of those beaches."<sup>23</sup>



### MISCONCEPTION #5:

**DO SOMETHING ELSE WITH MY MONEY, LIKE FUND OUR POLICE FORCES BETTER OR FUND SCHOOLS BETTER. LOW CRIME AND GOOD EDUCATION WILL BRING PEOPLE TO FLORIDA FOR THE RIGHT REASONS.**

The fact is, local taxes generated by tourism promotion support critical citizens services, including education, public safety, and infrastructure such as roads. In addition to providing people in local communities with the services they need, tourism and tourism promotion put 1.4 million people to work in Florida<sup>24</sup> and provide them with many opportunities to improve their lives. Reducing or diverting tourism

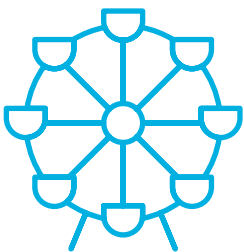
marketing funds to other uses actually eats into the source of funds for public safety, education, and infrastructure. Visitors underwrite those services, so increased tourism marketing will actually result in increased funding for community services.



### MISCONCEPTION #6:

**TOURISM IS JUST A BUNCH OF LOW-PAYING HOSPITALITY JOBS.**

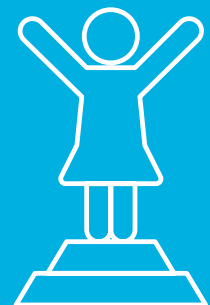
According to the Florida Chamber of Commerce and the Florida Chamber Foundation, Florida's hospitality industry helps foster the employability skills ("soft skills") attractive to most employers.<sup>25</sup>



One of the goals to improve Florida's talent pipeline delineated in the Florida Chamber Foundation's Florida 2030: The Blueprint to Secure Florida's Future is "80 percent of Florida's workforce

has essential employability skills,"<sup>26</sup> skills that many workers hone while working in the hospitality/tourism industry. And according to the U.S. Travel Association, two out of five workers that start their careers in hospitality end up earning six figures.<sup>27</sup> The tourism industry gives Florida's citizens a foot in the door, invests in their training, and then gives them the opportunity to learn the essential skills that can advance their careers.✶

**The tourism industry gives Florida's citizens a foot in the door, invests in their training, and then gives them the opportunity to learn the essential skills that can advance their careers.**









## SECTION 4



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# HOW FLORIDA DMOs ATTRACT MORE VISITORS



When it comes to tourism marketing, all marketing is local. Florida is not one large homogeneous destination. Florida offers big-city excitement and sophistication, small-town charm, beach-town relaxation and water sports, horse ranches, NASCAR racing, natural springs and rivers, hunters' and fishers' paradises, cruise ports, and the list goes on and on. Because each area of Florida is unique, each community needs its own brand of tourism promotion. That is where a DMO/CVB/TDC comes in.

## **WHAT IS A DMO/CVB/TDC AND WHY DO WE NEED THEM?**

A destination marketing organization (DMO), often called a convention and visitor bureau (CVB) or a tourist development council (TDC), is responsible for promoting a community as an attractive travel destination and for enhancing its public image as a dynamic place to live and work. Through the impact of visitors, the DMO strengthens the economic position and provides opportunities for people to work in its community.

Destination promotion is a public good for the benefit and well-being of all. It is an essential investment no community can afford to abate without causing detriment to the community's future economic and social well-being. DMOs are especially important for small or medium-sized markets that have to compete against the major metropolitan areas of our state, such as Miami and Orlando.

# A DMO PROVIDES THREE MAIN BENEFITS TO ITS DESTINATION

## 1 PROMOTION

The first benefit a DMO provides is promoting the destination. Most visitors choose the destination first, and then select the hotels and attractions they want to visit. To draw visitors, you must first market your destination—why people should come to your community, what is unique about it, and what it offers. A DMO does exactly that.

Just because one attraction can market itself, doesn't mean it can take on the task of marketing the entire region. DMOs around the state have launched marketing and advertising campaigns using traditional and social media to promote their regions. Here are some examples:

### **Punta Gorda/Englewood Beach Visitor & Convention Center's Are You Beach Ready? campaign**

was a post red tide campaign to show visitors that the region was safe and ready for visitation. Here are the campaign's results provided directly by the Punta Gorda/Englewood Beach Visitor & Convention Center:

- Attracted new visitors from the Northeast, Midwest, and Canada, and let visitors know the region was open for business and safe for visitation
- **\$1,009,357** Tourist Development Tax (TDT) in March 2019
- **5.43 percent** year-over-year increase in TDT
- Increased visitors in 2018 by **13.72 percent**

### **Visit St. Lucie's Share Your Summer social media campaign**

was created to increase off-season hotel occupancy. The DMO partnered with industry leaders to provide exclusive offers for locals to invite their friends and families via social media. In this campaign, the DMO effectively used local voices to attract new visitors to St. Lucie. Here are the results provided directly by Visit St. Lucie:

- Hotel occupancy was up **3.48 percent** in June 2017 and up **8.2 percent** in August 2017
- The impact of the campaign was felt in a community where tourism contributes more than **\$801 million in economic impact**<sup>28</sup>
- According to a 2017 Visitor Tracking & Economic Impact study by Visit St. Lucie, **94 percent** of visitors reported they will return to St. Lucie<sup>29</sup>

Both of these examples illustrate the power of the DMO to promote the destination as a whole. Other promotions might include a beach trip giveaway on a Chicago radio station during wintertime. The DMO can pull together transportation, lodging, meals, and attractions to create a complete package. A Chicago (or New York or Minneapolis) radio station won't be interested in a standalone hotel voucher. It is the DMO that can promote the entire destination and work with industry partners to provide a package that media will want to promote.



## 2 COORDINATION

Second, a DMO coordinates the many voices and messages of the tourism-reliant businesses within the community. Without a DMO promoting the destination with one coherent message, each hotel, restaurant, attraction, or other tourism-reliant company would be left to create its own messaging to describe the area's brand. The result of this would actually be no brand at all. Each description might be about the same few miles of the Florida coast or a natural camping area, but to the potential visitor it might sound like dozens of different locations. Consider what it would be like if every Publix grocery store created its own logo and branding. You wouldn't have a cohesive brand and you wouldn't know what to expect when you went there. That is why it is so important for the local DMO to serve as the community's brand ambassador to get everyone within the community on the same team in order to communicate with one voice and one message.

## 3 EXPERTISE

The third benefit the DMO offers to its community is expertise. The DMO understands who the target markets are for the community. The DMO researches and builds relationships with the important media within those markets. The DMO builds relationships with the online marketing companies and then works with local companies so they can take advantage of those relationships. The DMO is a great help to area businesses because individual companies and even their sales teams are often so busy dealing with the day-to-day that they don't have time to deal with marketing. They don't have the resources. They don't have the perspective the DMO has that allows it to understand each market and then tailor marketing messages to a specific market.



The DMO sells its community as a package—the DMO is the entity that connects visitors to the region. Tourism marketers connect local businesses, help build the destination's brand, and are the conduit to creating value. A DMO is a part of the community so it can tell that community's unique story in ways that attract visitors in various markets. Following are some examples.

## INTERNATIONAL MARKETING



In addition to domestic marketing within Florida and the United States, DMOs are instrumental in promoting their destinations to visitors from around the world. The travel

industry is a global industry. Every destination competes with every other destination on the planet. Destinations need to promote themselves specifically to potential international visitors, which represent an important sector of Florida's overall annual visitors. On average, international visitors stay longer and spend almost twice as much more per person than domestic visitors.<sup>30</sup>

- **From VISIT FLORIDA:** In 2018, overseas travelers accounted for nearly 11 million visitors to Florida—almost 10 percent of Florida's visitors that year.<sup>31</sup>
- **From the U.S. Travel Association:** "Just the failure to keep pace with global long-haul travel cost the U.S. 78 million lost visitors; \$606 billion in lost total travel and tourism output that could have supported 467,000 jobs annually; and \$37 billion in lost direct travel generated tax revenues. Imagine the economic benefits that might have accrued had the U.S. actually fought to increase market share, just as our travel competitors in Canada, Mexico, Australia and other nations did."<sup>32</sup>

**The message is clear. To be competitive, Florida needs local DMOs to leverage their expertise in marketing to potential visitors around the world.**





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## CONVENTION MARKETING

Another lucrative market that DMOs are in a position to tap for their communities is the conventions and meetings market. Large conventions can go anywhere. When Florida DMOs land them for their communities, those meetings have a tremendous economic impact, providing revenue for the tourism industry and tax revenue for the state. In Orlando, the Orange County Convention Center is known as the second largest convention facility in the United States, and attracts more than 1.4 million attendees to more than 200 conventions and events each year. According to George Aguel, president of Visit Orlando, “tourism drives the ship in the Orlando region.”<sup>33</sup>

While Florida is a highly attractive location for these large-scale events, the state has major competition from other states with equally attractive destinations and offerings, such as Nevada, California, Illinois, and New York, all vying for a meeting planner’s attention. Meeting planners are busy people. They are trying to find the best destinations and the best deals. And they are trying to decide which destination will attract the most participants. Being a peninsula at one corner of the continent, Florida is a long drive or flight from the rest of the country. For a meeting planner to say, “Yes, I want to put my meeting

in Florida,” that meeting planner must believe Florida is the location that is going to attract more attendees than any other, that there is pent-up demand among potential attendees to come to Florida. Being successful in this market requires traveling to where national organizations and associations are headquartered: Washington, D.C., New York City, Chicago, and Indianapolis (for train-industry related organizations), and competing with convention facilities either within those cities or nearby.

DMOs have team members who can promote their cities as convention destinations to meeting planners. This requires knowing what conventions are happening around the country, which meeting planners move their

events around to different cities throughout the country, which meeting planners are choosing to move their location soon, which conventions have the greatest return on investment, which ones bring the most attendees, which ones bring the most exhibitors, and which ones are going to have the greatest economic impact for the community as well as the state. DMOs are making calls on those meeting planners, giving them information about their community, and promoting their community’s resources to host a convention.

**1.4M**  
**ATTENDEES**  
**TO MORE THAN**  
**200**  
**CONVENTIONS**

One group, typically a DMO, needs to spearhead the process of obtaining a major convention for its city. It won't happen because one hotel talks to one caterer, an audio-visual company, and a facility that can accommodate a large group of people. You need a unifying organization, a DMO, to bring all the needed players together. Large events often use multiple hotels and a convention center, as well as several product and service suppliers, and it is really only the DMO that is able to pull each of the players together and create a proposal for the meeting planner to consider.

As an illustration of how this works, Discover The Palm Beaches created a campaign to bring in more conventions and events. Here is a summary:

**Discover The Palm Beaches** worked with the Palm Beach County Convention Center and hotel partners to launch an aggressive sales campaign to book conventions and events in Palm Beach County, with these results:

- **98 percent increase** in booking; highest booking year since 2014<sup>34</sup>
- **231,000 hotel nights** booked in 2018; double the 2014 number<sup>35</sup>
- **\$7 billion economic impact** in Palm Beach County, spurring the need to expand the convention center and convention center district<sup>36</sup>



© Discover The Palm Beaches

Another important role the DMO can play is to help educate residents of the community about the benefits of having a large convention in town. Rather than focusing on the inconvenience of increased traffic or longer waits at restaurants, the DMO can tout the substantial boost to the local economy, which goes back to employing people, helping the environment, and maintaining a high quality of life for the area's residents.





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## SPORTS MARKETING

Sports marketing targets a growing niche market in our state. Florida's sports industry helps welcome visitors to the state who wouldn't normally come. According to a 2017 report by the Florida Sports Foundation,<sup>37</sup> Florida's sports industry:

- Accounted for nearly **16 million non-resident visitors** to the state of Florida (15 percent of all Florida tourism)
- **Attracted \$12.1 billion** in purchases of goods and services from out-of-state buyers and visitors
- **Generated \$33 billion** in direct sales across the Florida economy
- **Generated \$57.4 billion** in total sales across the Florida economy
- Accounted for **580,000 jobs** in Florida
- **Generated \$3.3 billion** in revenues for state and local government coffers

Many local economies depend on visitors coming in specifically for sports. For example, The Beaches of Fort Myers and Sanibel's *Spring Training Promotion* includes partnerships with the Boston Red Sox and the Minnesota Twins to promote their Spring Training and brings visitors who wouldn't normally come to the region.

- **41 percent of visitors** surveyed said they were there just for Spring Training and shared they might not have come without it as an incentive
- **50 percent** said Spring Training was the primary reason for their visit
- **\$68.9 million** was spent by visitors<sup>38</sup> 🌟



## SECTION 5

# PRIMING THE PUMP ON FLORIDA'S ECONOMY





Now that we have established that tourism is good for Florida, that we need to invest in doing it, and that DMOs help attract visitors in a way that private enterprise cannot do, this is how and why lawmakers must protect the funding sources of local tourism marketing agencies and fully fund VISIT FLORIDA.

## PROTECT THE CURRENT USES OF TOURIST DEVELOPMENT TAXES

Tourist Development Taxes are how local communities support their area DMO/CVB/TDC and their own local tourism promotion efforts. Residents do not pay these taxes, but rather these taxes are paid *by visitors to attract more* visitors. Tourism promotion funding raised through Tourist Development Taxes is crucial to attracting and growing visitors throughout the state, including visitors to small and medium-sized destinations. A significant percentage of Florida's visitors are returning visitors, so ongoing promotion is necessary to keep them coming back year after year. Without funds dedicated to tourism promotion, local communities won't be able to attract new visitors, or even retain their current customer base for future stays. As we learned from the case studies of Colorado, Pennsylvania, and Washington State, when funding to promote tourism is curtailed or eliminated, tourists find other destinations to visit. Attracting fewer visitors means less work and fewer opportunities for the people who live in our communities.

It is critical to maintain the current permissible uses of Tourist Development Taxes and not view it as a pot of money that can be used for anything and everything. Lodging establishments voluntarily agreed to be taxed to promote tourism and visitation to their county. Expanding the use of this tax is a breach of that agreement. The voters approved the funding of local tourism promotion programs through Tourist Development Taxes because it provides the "seed money" necessary to stimulate the local tourism economy and keep visitors coming to the area. Diverting money away from tourism promotion, even for services such as public safety, reduces the positive economic support and opportunities visitors provide to local communities.



## FULLY FUND VISIT FLORIDA, THE STATE'S TOURISM MARKETING AGENCY

Florida needs to have a reauthorized and fully funded state tourism promotion program that serves a broader purpose than what the DMOs/CVBs/TDCs do for their local communities. VISIT FLORIDA promotes the Florida brand, one of the strongest brands in the worldwide tourism industry. Through its efforts, VISIT FLORIDA is able to focus on the larger markets that represent a significant share of Florida's visitors. This increases visitors' interest in and demand for the state versus specific destinations or activities within the state.

The tourism promotion conducted by VISIT FLORIDA has a direct impact on revenue generated for the state and the number of people the industry is able to put to work throughout the state. By joining with VISIT FLORIDA, local businesses and tourism promotion programs gain significant exposure and participate in programs they might not otherwise afford, including trade events and domestic and international advertising opportunities. This enables local dollars to go further.✱

**We've seen what happens in other states when they choose to eliminate or reduce funding for tourism promotion at the state level. They lose market share. Florida simply cannot afford to do that.**





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