

RFP 2020-BB  
Strategic Marketing Plan and Rebrand

Addendum 4  
Additional Information

See attachments below.

# Columbia County Tourist Development

## Overview (2019)

Tourist Development is an economic development component that strengthens the local economy and quality of life in a community. Columbia County Tourist Development is the marketing arm of the county that markets the area's tourist attractions and activities to increase the tax base through visitor spending which in turn bolsters the economy creating direct jobs at hotels, restaurants, services stations, and tourist attractions. Additionally, Columbia County Tourist Development Tax revenue is invested into events and youth sports venues to develop topnotch youth sports facilities. The enhanced facilities improve the quality of life for local citizens, as children of Columbia County are afforded the opportunity to play team sports at a first-class venue thanks in part to tourism.

## The Numbers

Tourist Spending in Columbia County		Tourism Business Impact	
Food & Beverage	\$45,100,000	Gross Output	\$209,800,000
Lodging	\$34,900,000	Employment	2,010 Jobs
Retail	\$20,100,000		
Recreation	\$14,900,000	Tourism-Generated Tax Revenue	
Gasoline	\$10,400,000	State	\$4,900,000
Other	\$7,100,000	Local	\$5,500,000
<b>Total Tourist Spending</b>	<b>\$132,500,000</b>	<b>Total</b>	<b>\$10,400,000</b>

Tax Revenue from tourists saves each Columbia County household **\$434.95** a year in state and local taxes.

Average Daily Traffic		Average Annual Traffic	
<b>I-75 and US 90</b>		<b>I-75 and US 90</b>	
RAMP I-75 SB TO US 90	2,600	RAMP I-75 SB TO US 90	949,000
RAMP I-75 NB TO US 90	4,000	RAMP I-75 NB TO US 90	1,460,000
RAMP US 90 TO I-75 SB	4,100	RAMP US 90 TO I-75 SB	1,496,500
RAMP US 90 TO I-75 NB	2,800	RAMP US 90 TO I-75 NB	1,022,000
<b>Total</b>	<b>13,500</b>	<b>Total</b>	<b>4,927,500</b>
<b>I-75 and SR 47</b>		<b>I-75 and SR 47</b>	
RAMP I-75 SB TO SR 47	2,100	RAMP I-75 SB TO SR 47	766,500
RAMP I-75 NB TO SR 47	1,400	RAMP I-75 NB TO SR 47	511,000
RAMP SR 47 TO I-75 SB	1,800	RAMP SR 47 TO I-75 SB	657,000
RAMP SR 47 TO I-75 NB	1,800	RAMP SR 47 TO I-75 NB	657,000
<b>Total</b>	<b>7,100</b>	<b>Total</b>	<b>2,591,500</b>

Columbia County Tourist Development has received \$92,500 in state grant awards this past year.

Columbia County TDC has awarded \$62,000 to festivals and sporting events this past year.

# Columbia County Tourist Development

## Overview (2019)

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### Current Organizational Structure

Executive Director (Paula Vann)

Oversees the marketing strategy and target markets, manages the budget and administration aspects of the department, and acts as the liaison between the Tourist Development Council and BOCC.

Sports Marketing Director (Alden Rosner)

The sales and event planning arm of the tourist development office. Promotes Columbia County as a desirable sports and event destination primarily through direct B2B sales strategies.

Marketing Project Manager (Kim Goldsmith)

Implements and manages tourist development advertising campaigns, social media, and website. Also, the project manager acts as the content manager and coordinator for print and digital media.

Office Manager (Michelle Moore)

Maintains and oversees general office functions, such as answering phones, payroll, accounts payable, filing, etc. Furthermore, this role is the hospitality liaison which delivers marketing materials and meets with each hotel and campground in Columbia County once a month.

### How do we currently market?

Columbia County Tourist Development markets county tourism through three main segments: Transient, Leisure, and Sports. These are segments targeted based on data from our hotels and campgrounds, that establishes transient and leisure travelers as our typical visitors. While sports tourism currently does not make up a large segment, the county and hospitality industry has committed to investing and cultivating Columbia County as a youth sports destination and expect this segment to grow in the coming years.

### Market Segmentation

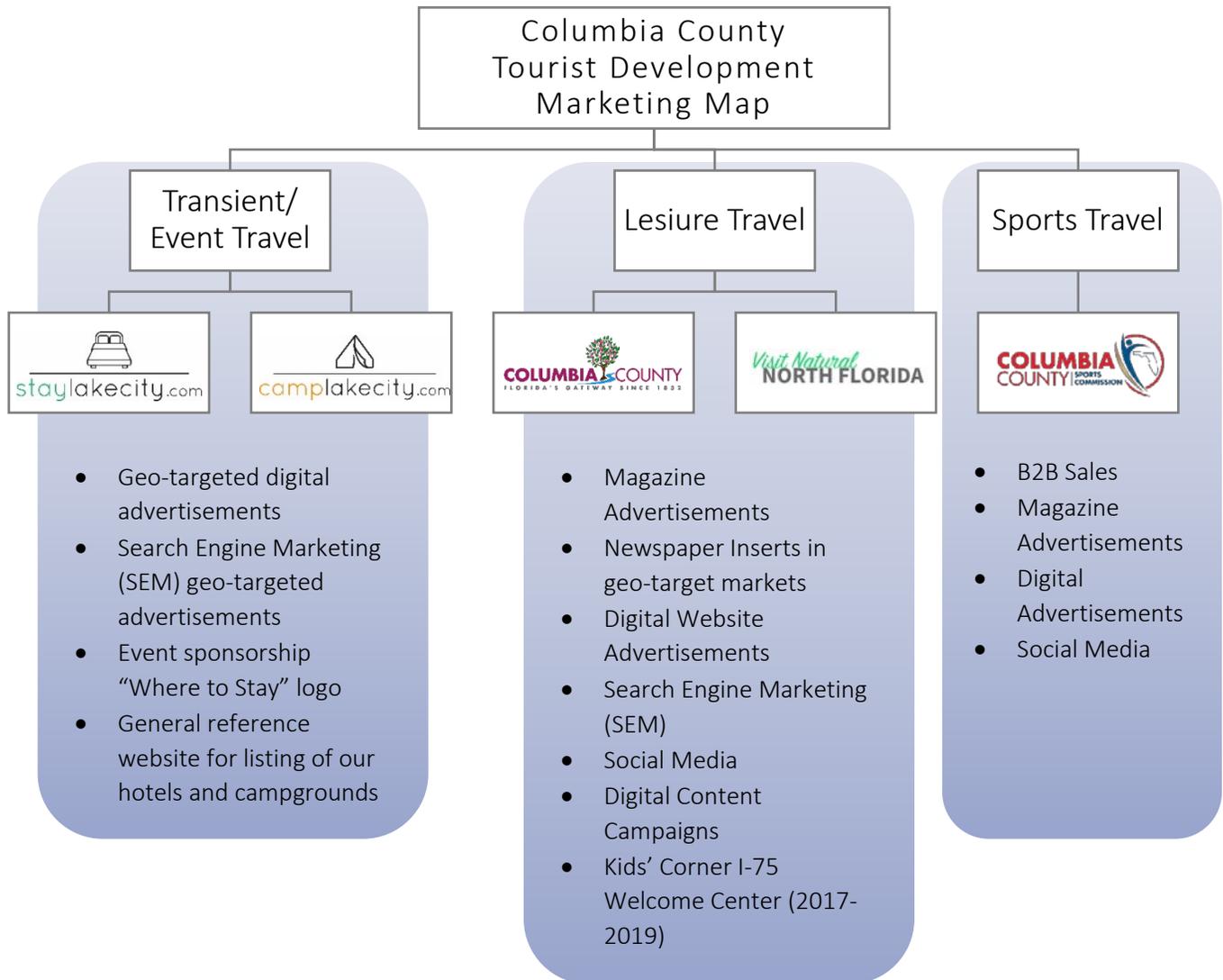
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	Hotels	Campgrounds
<b>Transient</b>	35%	18%
<b>Business</b>	29%	0%
<b>Leisure</b>	24%	74%
<b>Sports</b>	3%	4%
<b>Other</b>	9%	4%
<b>Total</b>	100%	100%

# Columbia County Tourist Development

Overview (2019)

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## Measure of Success

Currently, we cannot measure the exact number of visitors to Columbia County, but we do measure TDT revenue and website traffic from our target markets.

TDT revenue has increased **37%** (adjusted for 2016 increase) over the past four years. This is due to the implementation of a new marketing plan, restructured operations, new website, and the launch of multiple social media outlets. Moreover, the redefined marketing channels and proactive promotion efforts continue to drive traffic to Columbia County.

## Columbia County Tourist Development

### Overview (2019)

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	Total Collections	Revenue per 1%
<b>2014</b>	\$934,877	\$233,719
<b>2015</b>	\$1,002,363	\$250,591
<b>2016</b>	\$1,383,777	\$276,755
<b>2017</b>	\$1,524,914	\$304,983
<b>2018</b>	\$1,600,000	\$320,000

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Website traffic increased from an average of 500 sessions a year in 2014 to over 8,000 sessions a month in 2018.

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### Capital Investments

Per the recommendations by Huddle Up Group in the Sports marketing plan, our top priorities for capital projects over the next five years should be: Improve the existing facilities at Southside with additional lights, wi-fi, and aesthetic improvements; and invest in flat open fields for multiple sports tourism opportunities (i.e. Soccer, Lacrosse, Football, etc.) Additionally, we should solicit recommendations from a planner for additional recreational activities the county could invest in to provide entertainment during down-time between games during tournament play.

### Hotels

Columbia County is in desperate need of additional hotels. Our average daily rate now matches or surpasses that of nearby beach cities and larger urban cities. It is a basic supply and demand challenge that has a solution. More rooms will decrease the average price and make us more competitive and once again the value option for sporting events.

### Organizational Structure

#### Content Manager

There is a need for a dedicated Content Manager to generate, compile and manage print and digital content. The number one driver for this need is website and social media content. Google organically ranks your website and visibility to world by the amount, frequency, and quality of new content on your website and social media. This is a full-time task when implemented and managed effectively.

#### Sports Marketing Assistant

Given there is an increase in sporting and other events in the coming years, the Sports Marketing Director will need a support position to keep work flow efficient and the sports marketing program competitive.

# Columbia County Tourist Development

## Overview (2019)

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### TDT Revenue

Columbia County TDT revenue is expected to plateau in the next year or two, given the current number of hotel rooms. Columbia County is quickly approaching the national average for occupancy. This forecast is evidence that investment in sports tourism, hotel partnerships, and aggressive marketing strategies are vital for tourism's growth in Columbia County.



# **Florida's Suwannee River Valley**

## **Strategic Marketing Plan**

Prepared By:  
Gray Research Solutions, Inc.  
Nashville, TN

**February 2016**

<b>Table of Contents</b>	<b>Pages</b>
<b>1. Project Overview</b>	
Executive Summary	3 - 11
Study Objectives, Methodology	12
<b>2. Reconnaissance</b>	13-30
<b>3. Performance Audit and Status</b>	31-35
<b>4. Florida Visitor Profile Research</b>	36-39
<b>5. Lodging Study and STR Analysis</b>	40-49
Smith Travel Research Data for (Columbia/Hamilton/Suwanee Counties, Florida)	44-49
<b>6. Strategic Marketing Plan</b>	50-59
<b>7. Appendix A</b>	60-61
Lodging Property List	60-61

**Executive Summary**

*Strategy is a plan around which you improvise. ~Peter Drucker*

**Summary of Performance Review**

In 2010, Columbia County, Hamilton County, and Suwannee County entered into an interlocal agreement creating Florida's Suwannee River Valley Marketing Group and thereby creating a separate legal entity. The agreement states that *"the parties hereto desire to make the most efficient use of their resources and powers to cooperate for their mutual advantages to promote tourism development within the region."*

The SRVMG is run by a 6 member board, with organizational meetings convened by the Executive Director of Columbia County Tourism (Paula Vann). Offices are located within the Columbia County TDC office at 971 West Duval St. in Lake City, FL.

**SRVMG Funding**

SRVMG funding is tied to partnership participation and grants rather than lodging tax revenue. The SRVMG is funded through various sources which include the following:

- Florida Department of Economic Opportunity Grant
- Participating County Buy-ins
  - Columbia County: 72% of matching funds
  - Hamilton County: 11% of matching funds
  - Suwannee County: 17% of matching funds

	2012	2013	2014	2015	2016
<b>Florida Department of Economic Opportunity</b>	\$16,471				\$50,000
<b>Columbia County</b>	\$53,529	\$60,000	\$64,000	\$25,000	\$36,000
<b>Hamilton County</b>		\$4,000		\$4,000	\$5,500
<b>Suwannee County</b>		\$6,000	\$6,000	\$6,000	\$8,500
<b>Total Marketing Budget</b>	\$70,000	\$70,000	\$70,000	\$35,000	\$100,000

**Direct Visitor Spending/Tourism Revenues**

Total 2015 Tourism Revenues for Tourism in Suwannee River Valley (for visitors staying in hotels only):

470,989 Sold hotel nights in Suwannee River Valley (STR 2015 data)  
 x 1.8 Average party size of Visitors to North Central FL (FL 2015 Visitor Profile)  
 x \$109 Average Daily Expenditures of Visitors to N. Central FL (FL 2015 Visitor Profile)

**\$92,408,041** Direct Visitor Spending of HOTEL visitors to Suwannee River Valley

Does not account for:

- Campground visitors
- Daytrippers
- I-75/I-10 stops
- Visiting friends/relatives

**Estimated Tax Relief from Tourism in the Columbia-Hamilton-Suwannee County Region**

The table below illustrates the taxes levied on visitors to the SRV region and the number of households in each county and in total. Tourist Development taxes go to fund the TDCs in each county, and aren't included in any tax revenue calculations. In addition to the tourism development taxes (5% in Columbia County and 3% each in Hamilton and Suwannee Counties), visitors pay 6% state sales tax and 1% additional sales tax in each of the three counties.

County	Households	Tourist Development Tax	FL Sales and Use Tax	County Sales and use tax
<b>Columbia County</b>	24,941	5%	6%	1%
<b>Hamilton County</b>	4,617	3%	6%	1%
<b>Suwannee County</b>	15,963	3%	6%	1%
<b>Total Households</b>	45,521			

Since we know the estimated direct visitor expenditures in the combined three counties (\$92,408,041), we can estimate the total sales tax (state and local taxes, but NOT tourist development taxes) paid by visitors. In 2015 visitors generated nearly \$1Million in county taxes and over \$5.5Million in state taxes with a total of nearly \$6.5Million. By dividing the total taxes generated by the number of households in the three counties, we see below that because of hotel visitors in SRV (not even including the spending of campground visitors, friends and family visitors, daytrippers or stops from the interstate), **each household pays at least \$142.10 less in state and local taxes.**

	County 1% Sales Tax	State 6% Sales Tax	Total
<b>Tax revenue generated in SRV</b>	\$924,080	\$5,544,482	\$6,468,563
<b>Tax Relief per Household in SRV</b>	\$20.30	\$121.80	<b>\$142.10</b>

## **Summary of Florida and Regional Visitor Profile Research**

According to Visit Florida's 2015 *Profile of Domestic Visitors by Florida Region*,

*The North Central region had the largest percentage of visitors traveling to visit friends or relatives (37%), when compared with the other vacation regions. Travelers who visited the North Central region had the lowest average expenditures per person per day, in comparison to the other regions. Domestic travel to this region most often occurred during the spring. The Silent/ GI generation group represented 21 percent of visitors to this region, the highest percentage observed among the regions. Camping in the North Central region ranks higher as a primary activity than any other region in the state.*

### **Profile of Most Likely Visitor**

Based on the information provided by Visit Florida, and data collected from Suwannee River Region hotels and campgrounds, the following is the most likely visitor profile for the Suwannee River Region:

- Drive visitors (I-75 and I-10)
- Primary Points of Origin: GA, AL, TX, NC, NY
  - Secondary Point of Origin: LA, SC, TN, VA, OH, IL, IN
  - Outdoor Recreational Visitor Point of Origin: FL, GA, AL
- Trip Purpose: Passing Through, Business, Visiting Friends & Relatives, Event (weddings, family reunions, etc.), Outdoor Recreation
- Length of Stay: 1-3 nights
- Repeat Visitor
- Age: Majority is 55+, secondary is 30-55
- Typical Travel Party: 1-2 adults
- Seasonal: More "snowbirds" in spring and winter, more families in summer, more regional in fall.

### **Analysis: Recommended Methods for Reaching Most Likely Visitors**

Based on analysis of all available data, as well as professional experience with similar destinations, Gray Research Solutions recommends the following as best options for reaching most likely visitors:

- Website
- Mobile App (mobile version of website)
- Florida Visitor Center (I-75 and Georgia State Line): Recommend development of "showcase area" in partnership with center
- Billboards
- Visitor Guide: Placed in hotels within the 3-county region
- Tear-off maps: Placed at all regional hotels, attractions, etc.
- PR and Travel Writer Solicitation

**Summary of 2015 SRV Lodging Study**

**SRV Lodging Inventory**

The Suwannee River Valley region encompasses three (3) counties. Most of the region's hotel lodging rooms are in Lake City (Columbia County). There are currently 43 hotel/motel properties representing 2,238 rooms in the region and an additional approximately 25 campgrounds/RV parks representing 1,128 RV sites/pads.

County	# of Hotels/ Motels	# of Rooms	% of Regional Room Inventory
Columbia	28	1743	78%
Suwannee	8	279	12%
Hamilton	7	216	10%
<b>Total</b>	<b>43</b>	<b>2238</b>	<b>100%</b>

(source: SRVMG, STR)

**2015 Lodging Market Segmentation**

2015 Campgrounds (1128 RV sites)	2015 Hotels/ Motels/Inns (2238 rooms)	Annual Overall Market Mix (Segments):
32%	33%	Response Rate
<b>74%</b>	<b>24%</b>	<b>Leisure</b>
22%	7%	Leisure—Visiting Local Friends and Relatives
26%	6%	Leisure—Tourists visiting SRV area local attractions, outdoor recreation, etc.
19%		Leisure—Campers staying as part of an overall trip to Florida
4%	5%	Leisure—Hunting and Fishing
	4%	Leisure—Staying here to attend a specific event (concert, festival, etc.)
3%	2%	Individual (non-group) Sports
<b>0%</b>	<b>29%</b>	<b>Business</b>
	13%	Individual business travelers (white collar)
	16%	Blue collar workers (mineral industry, commercial, construction laborers, etc.)
<b>18%</b>	<b>35%</b>	<b>Transient</b>
18%	35%	Passing through as part of a longer trip along I-10 or I-75
<b>8%</b>	<b>12%</b>	<b>Conference/Meeting/Group</b>
	4%	Conferences/Meetings
4%	3%	Sports events (games, tournaments, etc.)
4%	5%	Weddings/reunions/family events/social events
Equestrians, snowbirds	Pipeline workers, government, cave diving	<b>Other</b>

(source: GRS 2016 Lodging Study)

**2015 Visitor Profile by Season**

	Spring	Summer	Fall	Winter
Type of Visitors	Leisure, families, festivals/events, golf, paddlers	Leisure, families, summer vacations, Disney travelers	Leisure, events, football, hunters/fishers, snowbirds	Snowbirds, leisure, holiday travelers, sports, families

**Top Ranked Priorities**

GRS asked lodging properties to rank the following customer segments in order of highest priority (1) to lowest priority (9) for future sales and marketing efforts by the Suwannee River Valley Marketing Group. Overall lodging properties preferred that the SRVMG prioritize Leisure Vacations (2.43), Nature/Outdoors Tourism (3.15) and Family Reunions (4.08).

Traveler Segments	Ranking (where 1 is highest/top priority)
Leisure/Vacations	2.43
Nature/Outdoors Tourism	3.15
Family Reunions	4.08
Conferences/Meetings	4.98
Family Vacations (children)	5.09
Weddings	5.14
Team Sports Events	6.56
Fraternal/Social Groups	6.77
Religious Groups	6.80

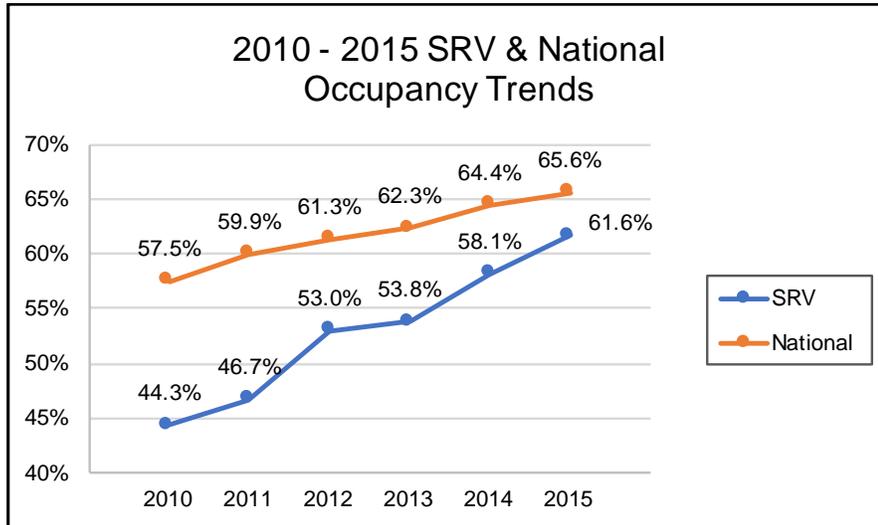
**Smith Travel Research Data**

GRS obtained lodging data from Smith Travel Research (STR) in the form of a five-year trend report for hotel/motel properties in the combined three counties of the Suwannee River Valley region (Columbia, Suwannee, Hamilton). The data reflects primarily chain-affiliated hotel/motels, all of which are located in the three-county region. It is important to note that STR continually updates their data, therefore, numbers can change on a month-to-month, and year-to-year basis. The most current numbers provided by Smith Travel Research are represented here. The STR data has a 61% monthly response rate for 2016 from the 2,090 rooms in the STR database. Therefore, this data can be considered very reliable.

Year	Occupancy	ADR	RevPAR	Supply	Demand	Revenues
2010	44.3%	\$63.31	\$28.04	848,188	375,663	\$54,826,335
2011	46.7%	\$68.43	\$31.95	830,435	387,749	\$57,752,107
2012	53.0%	\$69.42	\$36.81	802,969	425,802	\$50,933,006
2013	53.8%	\$70.96	\$38.16	802,635	431,586	\$55,335,079
2014	58.1%	\$73.95	\$42.99	799,415	464,799	\$53,848,303
2015	61.3%	\$77.89	\$47.77	767,960	470,989	\$51,342,305
2016 YTD (September)	61.6%	\$82.24	\$50.69	570,570	351,719	\$28,924,437

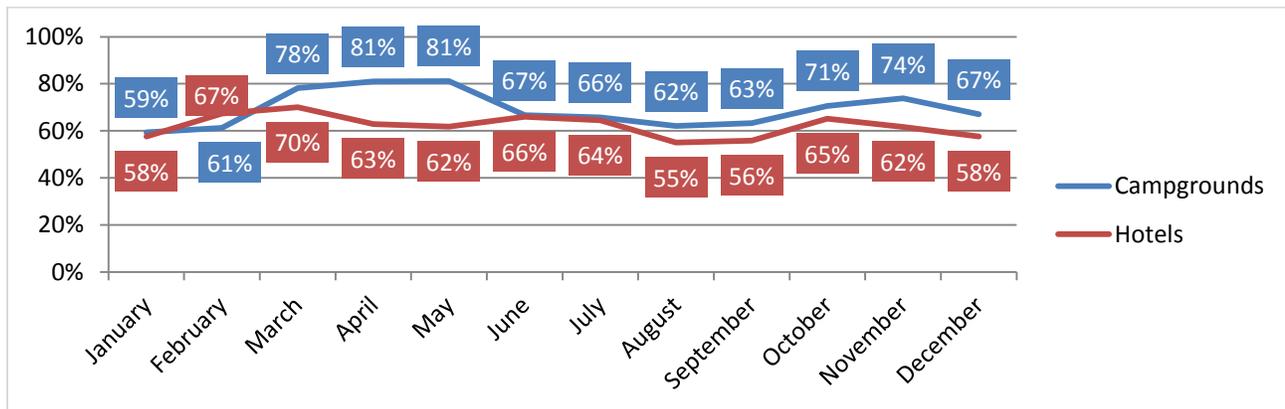
Source: Smith Travel Research - 2016 Trend

Overall, over the past five years regional occupancy has underperformed national averages, but SRV shows steady growth and a narrowing of the gap. 2015 showed the highest occupancy in at least 5 years in the region.

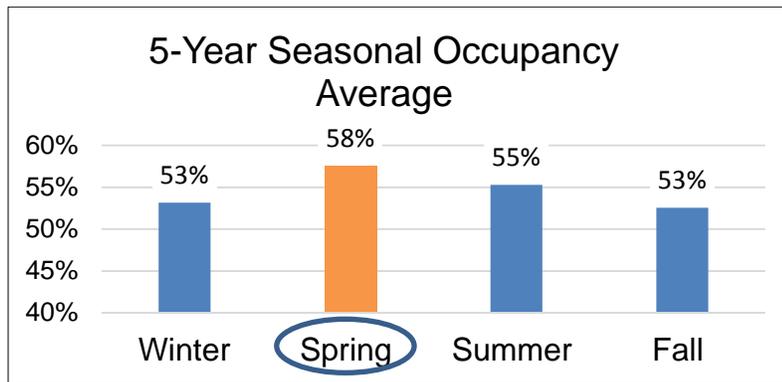


**Campground Occupancy vs. Hotel Occupancy**

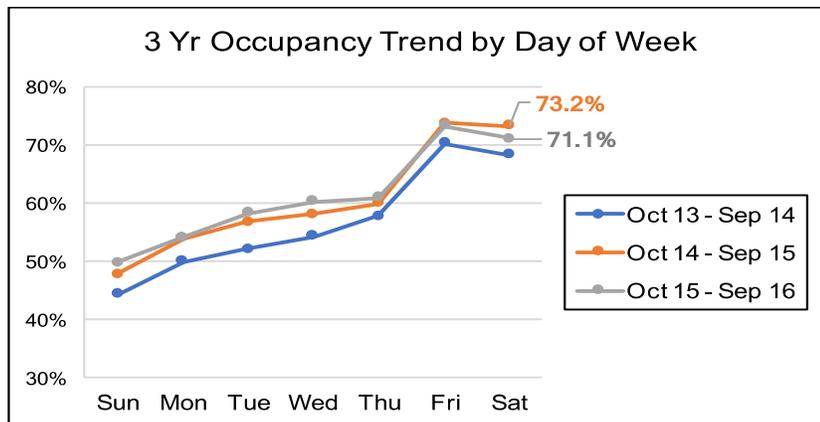
In addition to Hotel occupancy (as reported by STR), Gray Research Solutions also gathered occupancy data by month from area campgrounds. Campground occupancy is generally higher than hotel occupancy, except in January, February, June and July. Campgrounds performed considerably higher than hotels in the spring months (March, April and May).



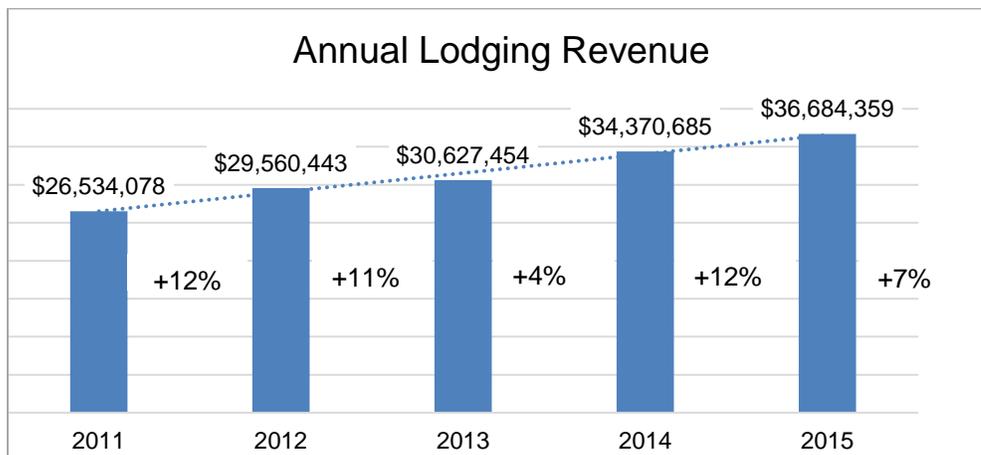
Spring is the strongest season overall.



Friday and Saturday are the strongest days of the week.

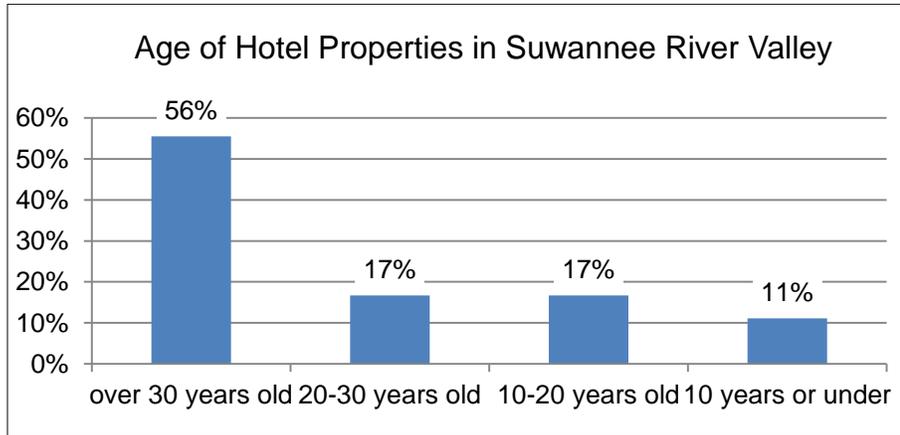


Revenue has increased by 38% in the last six years! The chart below graphically illustrates the positive pattern in lodging revenues, which show a steady increase. However, the year over year % increase isn't consistent. The year over year revenue increase in 2013 and 2015 were not as strong as in the other years.



**Age of Hotel Properties**

According to STR, over half of the SRV region's hotel properties are over 30 years old. This does have an impact on visitor impressions of an area. Properties will need to be updated to continue to attract area visitors (See full list of properties by county and age in Appendix A).



**Summary of Strategic Marketing Plan**

**Suwannee River Valley SWOT Analysis**

<p><b>Strengths</b>                  Springs, natural areas                  Camping opportunities                  Location at Florida's entrance</p>	<p><b>Weaknesses</b>                  Sense of regional place                  Signage/Wayfinding                  Lack of meeting space</p>
<p><b>Opportunities</b>                  Intercept more driving visitors from I-10 and I-75                  Travel writing and PR</p>	<p><b>Threats</b>                  Funding, participating partners                  Aging hotel properties                  Lack of awareness</p>

**Summary of Strategic Marketing Plan Priorities**

		\$ - Lower Cost, Short Term Priorities	\$\$\$ - Higher Cost, Long Term Priorities
Strategy 1	Market as a region	<ul style="list-style-type: none"> <li>All 3 counties should participate in funding to secure the EDO grant for 2018 and beyond</li> <li>Inventory attractions, list on brochures, maps and website</li> <li>Track key regional metrics</li> </ul>	<ul style="list-style-type: none"> <li>Create responsive regional website</li> <li>Potentially expand region to include neighboring counties</li> </ul>
Strategy 2	Prioritize Interstate Traffic	<ul style="list-style-type: none"> <li>Showcase area at I-75 Welcome Center</li> <li>Design one brochure featuring gem toned springs, print liberally</li> <li>Design and print regional tear-off maps, leave at hotels and welcome center</li> </ul>	<ul style="list-style-type: none"> <li>Billboards (using gem-tone spring photo)</li> </ul>
Strategy 3	Raise awareness of regional offerings	<ul style="list-style-type: none"> <li>Collect/commission "gem-tone" photos of springs, use liberally</li> <li>Attract travel writers</li> </ul>	<ul style="list-style-type: none"> <li>Create comprehensive regional visitors guide</li> <li>Hire PR firm</li> </ul>
Strategy 4	Attract more groups	<ul style="list-style-type: none"> <li>Inventory facilities for family reunions/weddings</li> <li>Create "design your own reunion" page on website</li> </ul>	<ul style="list-style-type: none"> <li>Potentially hire inventory/sales person for groups</li> </ul>

## Study Objectives

The overall objective of this study was to conduct comprehensive research and develop a strategic marketing plan to effectively position and market Florida's Suwannee River Valley as a travel and tourism destination of choice. The Suwannee River Valley Marketing Group retained Gray Research Solutions (GRS) of Nashville, TN to conduct this study.

The primary research objectives for this study were:

- Conduct a visioning process among Marketing group members to identify past, current, and future opportunities for tourism development and promotion.
- Contain a Strengths, Weaknesses, Opportunities and Threats analysis of the region.
- Identification of existing tourism attractions and infrastructure.
- Identification of future tourism attractions, facilities and infrastructure needs.
- Identification of goals and objectives to be implemented during the 5-year period of the strategic plan.
- Development of marketing and promotion strategies for the 5-year period of the strategic plan.

## Study Methodology:

Research was conducted in Suwannee River Valley from October through December 2016. The following methodology steps were implemented:

- 1. Kickoff Meeting, Visioning Session, Materials Gathering**  
Initial meetings reviewed study methodology, deliverables, lodging survey questionnaires, gathered input, etc.
- 2. Reconnaissance**  
The team visited and evaluated visitor information centers, attractions, hotels, restaurants, retail stores and amenities. Other elements evaluated included signage, gateways, wayfinding, and front line hospitality.
- 3. Performance Review and In-depth Analysis of Status**  
GRS conducted an evaluation and analysis of the SRV organizations governance and structure, mission statement, funding, budgeting, program of work, and performance measures.
- 4. Lodging Study and STR Analysis**  
A confidential survey was sent to all 36 Suwannee River Valley lodging properties. 13 hotels and 7 campgrounds responded to the survey, for a 36% response.
- 5. Florida Visitor Research Secondary Analysis**  
Available state and regional visitor information was analyzed for an understanding of the SRV's best target visitors and markets.

**Reconnaissance**

A professional Reconnaissance Team visited Florida's Suwannee River Valley region at the request of the Suwannee River Valley Marketing Group. The dates of site visitation were October 17-19, 2016.

The goal of the Reconnaissance Team was to experience Florida's Suwannee River Valley Region from the perspective of the visitor. Therefore, the team made all its schedules and arrangements using the tourism marketing materials made available by the Suwannee River Valley Marketing Group, the State Visitors Guide, the State Welcome Center's various regional materials and the internet sites for the state and the Suwannee River Valley Marketing Group. Attractions listed in these materials were located and visited. The team also explored restaurants, shopping and lodging where possible. The area was seen in excellent conditions, as the weather was seasonably warm with an occasional rain shower throughout the visit.

Dr. Larry Gustke, Ph.D., N.C. State University, retired, developed the professional method of selection, evaluation and analysis used in this process. The report does not follow any chronological order since we visited many areas more than once and tried to enter and exit the area from numerous possible routes used by visitors. It is important to note that the Suwannee Region is quite large, encompassing the following counties:

- Columbia County: 801 square miles, population approximately 70,000
- Hamilton County: 519 square miles, population approximately 15,000
- Suwannee County: 692 square miles, population approximately 42,000
- This region benefits from being the crossroads of two major Interstates in Florida, specifically I-75 (north/south with approximately 108,000 AADT (average annual daily traffic, 39.4 million annually) and I-10 (east/west 21,000 AADT, 7.7 million annually).

Thus, the Suwannee River Valley encompasses two of the heaviest traveled Interstates in the region, is located on the Georgia/Florida state line, and benefits from a state welcome center. The region literally experiences a "River of Money" flowing through everyday due to this advantageous location and resulting facilities.

The Reconnaissance Team's goal was to fairly experience the typical things that visitors encounter in the area which includes a sampling of activities, dining and lodging.

This Reconnaissance Report is the first step in a comprehensive market research and analysis. While conducting this research, great care was given to examine the attractions and amenities within the Suwannee River Valley for market potential among all segments. The RTM team made every effort to locate all the key attractions, lodging, dining, shopping and activities of interest to the traveling public.

The following is a documentation of the Reconnaissance Team's findings.

**This Reconnaissance Evaluation Includes:**

- Gateways
- Welcome/Visitor Centers
- Attractions and Amenities
- Meeting/Convention and Event Facilities
- Outdoor Recreation, and Sports Team/Tournament Event Facilities
- Shopping
- Restaurants and Dining

- Lodging and Campgrounds

### Gateways

The ancient Egyptians understood the importance of gateways. Nomadic travelers emerged from the desert and found huge avenues lined on both sides by massive golden Sphinxes leading them to huge, gated entrances into the walled cities. It was impossible to arrive at the ancient Egyptian cities without having a sense of awe at the city before you.

Most cities in modern America have lost the sense of importance for gateways. This is perhaps due to the fact that most cities in America have grown in a concentric pattern, with growth coming on the outer rings of the city. Thus, what happens over time is that the traveler basically arrives at the “back door”, prior to seeing the more impressive areas of the destination. An effective gateway announces to the traveler that they have arrived in an area and provides a sense of place. Similarly, directions to visitor information, way finding and signage are critical elements in assisting travelers and making them feel welcomed. Effective attention to these elements can result in longer guest stays and better conversion, thus greater economic impact.

### Overall Gateway Analysis

Florida's Suwannee River Valley is fortunate to be located at the Georgia/Florida state line, and thus be home to one of the **State of Florida's Welcome Centers**. States have long understood the importance of welcoming visitors as well as providing information, brochures, maps, and other tools to encourage visitation. The State Welcome Center on I-75 at the Georgia/Florida line is no exception...it is well maintained, fully stocked with great information, and has professional and eager staff to greet and serve the traveling public. The only downside to having this excellent facility is it requires the local destination to make an outstanding impression for itself in order to be noticed above all the state has to offer.

Sadly, there is no official “Gateway” to the Suwannee River Valley. While there is I-75 with its State Welcome Center, and I-10, the only way travelers know they are in the Suwannee River Valley is by noticing the location of the Suwannee River on the state map, or by the Florida Department of Transportation (DOT) brown attraction signs for Spirit of Suwannee Music Park, Stephen Foster State Park, and Suwannee River State Park. Thus, there is likely to be little awareness of a region titled **Suwannee River Valley**. Even at the Florida State Welcome Center, there is little emphasis on the region, other than in typical brochures found for each region. This needs to be remedied. One way of doing so would be to partner with the State Welcome Center to create a special section at the center showcasing information for the **Suwannee River Valley**.

### Primary Routes into Destination

As outlined on page 1 of this report section, Florida's Suwannee River Valley benefits tremendously by its location at the crossroads of I-75 and I-10. These two major arteries have a combined *daily* traffic count of nearly 130,000 vehicles, or nearly **50 million** annually. Again, this literally equates to a “River of Money” running through this region for the potential benefit of tourism development.

### Airports

Jacksonville International Airport and Tallahassee International Airport are the two dominant airports for the region. Neither are located within the region, but both are within a 1-2 hour driving distance. Both airports provide outstanding connectivity for potential visitors. Having flown into and out of both airports on numerous occasions, our Reconnaissance Team has not seen any visual displays for the Suwannee River Valley Region, or found any visitor information for this area.

**Amtrak**

As with the airports, there are significant Amtrak stations in both Tallahassee and Jacksonville. Thus, Amtrak stations should be provided visitor information for Florida's Suwannee River Valley. Ridership for Amtrak is growing, especially among seniors. This should be a part of any marketing strategy for the region.

**State Signage (Attractions, etc.)**

While driving through the Suwannee River Valley our team noticed a good number of Florida DOT brown signs for major attractions (Stephen Foster State Park, etc.) for the more significant attractions in the region. This, again, is fortunate for informing travelers about these attractions and driving visitation.

**Billboards**

Billboards **WORK** in this region due to the significant traffic volume on the two major Interstates (I-75 and I-10) and should be a key part of any marketing strategy adopted by the Suwannee River Valley Marketing Group. Hotels in the region currently are the primary tourism entities that have billboards in this Columbia-Hamilton-Suwannee Counties region.

**Signage and Wayfinding**

Since many of the attractions in the Suwannee River Valley are state parks and facilities or major attractions (such as Spirit of the Suwannee Music Park), the signage provided by the State of Florida DOT assures good wayfinding in the region. Gray Research Solutions was pleased to find this level of reliable signage for the attractions including the state parks, the historical museums, and other attractions.

**Welcome / Visitor Centers**

Travel research shows many travelers orient themselves to an area they are visiting by beginning their trip at a welcome or visitor center. These information centers are usually funded by the state or local governments and are intended to provide travel and trip planning information for the traveling public. Staffing at these information centers is usually full-time, along with some part-time or volunteer assistance. Many local visitor centers are staffed entirely by volunteers. The traveler usually forms the all-important first impression of an area while they are in the visitor center. Visitor centers should be staffed by friendly well-informed people, who enjoy using the brochures, maps and guides in stock to help the visitor plan their stay. A visitor center is a front-line sales agency that should proactively place visitors in lodging, dining, attractions and retail. This is the opportunity to make direct economic impact on an area.

**State of Florida I-75 North Welcome Center**

This facility is located 4 miles north of Jennings, Florida on I-75. It is described on page 5-2 of this report. Unfortunately for the Suwannee River Valley Region, this center does little to promote tourism direction in its immediate surrounding region. This is not the responsibility of the State. It is the responsibility of the Suwannee River Valley Marketing Group and each of the local Destination Marketing Organizations (DMOs).

Gray Research Solutions recommends seeking a specific area within this Welcome Center to showcase the Suwannee River Region. There is an in-center area just inside the main door, to the left, that would be perfect for a partnership between the State and the Suwannee River Valley Marketing Group. Here, every arriving and departing visitor would have an opportunity to see and learn more about the Suwannee River Valley and why they should visit. As this is the single most likely place to actually be able to place regional tourism information directly into the hands of visitors, this is highly recommended!

**Other Welcome Centers**

While other locations, Chamber of Commerce, Amtrak Stations, etc. were found, there were no other visitor information locations noted in the three-county region.

**Mobile Visitor Information**

A website does exist for "Florida's Suwannee River Valley" with the tagline "Your Next Adventure is Right Here." Interestingly, there is a listing of campgrounds, but not hotels. This appears to be an initial effort to develop a website for the region.

[www.suwanneerivervalley.webs.com/campgrounds.html](http://www.suwanneerivervalley.webs.com/campgrounds.html)

### **Attractions in Columbia, Hamilton and Suwannee Counties**

Typically, we find attractions listed in tourism promotion materials in alphabetical order. This is done to be “politically correct” and to give all attractions equal attention. Unfortunately, this is not in the best interest of the customer. The tourist wants to know the “attractors” or those things that are “must sees” while in the area. Other attractions are important to the visitor and should be identified, but should be described accurately and in context. Also, it is critical to include accurate hours of operation, street addresses (rather than mailing addresses) and cost of admission. Any other charges, such as parking fees, should also be noted. A suggested amount of time required for a visit to an attraction is an excellent feature. If the attraction is targeted at children or perhaps more appropriate for adults, it is good to include this in the description. Also, if an attraction is not open on the weekend, the attraction should probably not be included. Weekends are the busiest time in tourism and if an attraction is not open on weekends, those tourists who have misread the hours of operation and arrive to find a closed facility will be disappointed. Doing these things prevents customer frustration and helps the guest facilitate a visit.

Those attractions that achieve excellence usually offer:

- Excellent signage and wayfinding to the attraction.
- An orientation for each visitor to help them understand why the attraction is worthy of their time, what they will learn, see, do and/or experience and how best to spend their time at the attraction.
- Clean and accessible restrooms.
- Guided, narrated tours and interpretive experiences (or user-friendly self guide materials). Incorporating the senses (visual, hearing, touch, smell, taste) is important in creating an interactive experience. Static “read the plaque and look at the artifact” type museums or attractions suffer complaints from today’s demanding tourism customer.
- Benches, chairs and other resting spots where a weary traveler can pause for a moment’s rest.
- Suggestions from the attraction for other things to see and do in the area, as well as lodging and dining recommendations to better help the customer plan their visit.

During the reconnaissance, the team differentiates between attractors and attractions.

Attractors are the events, facilities, and “things to see and do” that motivate people to buy an airplane ticket or get off the interstate and visit a place. Attractions are “things to see and do” that compliment or supplement the major reason or purpose for travelers to visit a place. We differentiate between these because of the importance they play in attracting visitors. Our observations and impressions focus on the value and pull power of attractors and attractions.

Attractions in the three-county region range from small, historic attractions such as Hamilton County Old Jail Museum and Lake City Historical Society Museum, to the upscale hunting & fishing resort Bienville Plantation, to North Florida Speedway dirt track racing, to some of the most impressive state parks in the State of Florida that feature beautiful gem-colored springs, to the iconic Stephen Foster Folk Culture Center, and to the outstanding and unique Spirit of the Suwanee Music Park.

Gray Research Solutions firmly believes that the combination of all the attractions in the three-county region is advantageous to all. While the majority of lodging, restaurants, and shopping is found in Lake City/Columbia County, the attractions and facilities that bring people to the area are scattered throughout the region. Thus, each participant in the regional marketing effort benefits from the assets of the others. Working together they are more likely to achieve growth than individually. This “economy of scale” definitely benefits the counties with smaller tourism

marketing budgets. It might even be worthwhile to consider expanding and inviting other counties to participate in the regional tourism program.

One of the critical problems with the attractions in the region is that they are *unknown* to the approximately 108,000 cars traveling along I-75 daily (39.4 million annually) or the 21,000 vehicles traveling along I-10 daily (7.7 million annually). While the Florida Department of Transportation (DOT) provides signage along interstates for most of the major attractions in the region, this does not compel visitation as thoroughly as good marketing can accomplish. Thus, not having a regional marketing effort that *reaches* visitors along these exceptional corridors hurts the potential success of these assets. If a regional marketing effort could accomplish reaching this market, it would make a striking difference for these attractions.

Below are the specific facilities reviewed by Gray Research Solutions during our Reconnaissance:

**Columbia County: Attractions and Amenities**

- **Lake City Columbia County Historical Museum:** Historic Victorian House, closed while we were there. Looking in the windows it appears to be more of an event center than a viable tourism museum. No hours of operation were posted. No interpretation was found on the outside of the house.
- **Lake City Gateway Airport:** Corporate/charter air services. No commercial airline activity.
- **Florida Gateway College:** Approximately 7,000 students from a 5-county region (Baker, Columbia, Dixie, Gilchrist and Union Counties). Part of the Florida College System, located in Lake City. Established in 1947 as the Columbia Forestry School, became a junior college in 1961. Adopted its current name in 2008. Offers academic programs in liberal arts and sciences, occupational training and personal enrichment. Little of casual visitor interest other than perhaps events.
- **Saint Leo University – Lake City Educational Center:** Part of Saint Leo University (regional campuses in 7 states). Again, little of casual visitor interest other than perhaps events.
- **Columbia County Fairgrounds:** Banquet hall (6,786 sq. ft., capacity 499); annual County Fair (fall); Annual Rodeo; Annual Smoking Pig BBQ Fest; Primarily attended by those living in the immediate and regional area.
- **Quail Heights Country Club:** Condo rentals and “Stay and Play” packages available; Various events; 18-hole championship course; Lounge; Restaurant; Pro Shop; Banquet Room; Primary benefit for tourism is golf availability, plus as a potential venue for weddings, reunions, events.
- **Columbia County Aquatic Complex:** This is a nice outdoor facility with no indoor pool. This limits its potential for recruiting out-of-county visitor teams. Our team assumes this is primarily used by local/regional residents.
- **Southside Recreational Complex:** Large sports complex with approximately 25 fields (baseball, softball, soccer); tournament ready; good paved parking; concession and restrooms available; lighted fields; batting cages; Excellent facility for tournaments if capacity allows and recruitment (direct sales) efforts can be sustained. In discussions with tourism leaders, the primary points of origin for teams visiting this complex from out-of-region are Georgia as well as middle and south Florida. Good, user-friendly website for tournament planning.
- **Alligator Lake Recreation Area:** Recreation area with horseshoe pit, fishing, trails, lake, playgrounds, covered-picnic pavilions, etc.; Primarily used by local residents.
- **North Florida Speedway:** Dirt track and stock car racing. Typical annual calendar of events. Primary audience is local/regional.
- **Lake City Mall:** This is a nice, mid-size regional mall. Anchor tenants include Belk's and JC Penney. Others observed include TJ Maxx, Payless Shoes, Starbucks, Bath & Body Works, Kay Jewelers, Hibbett Sports Goods, Office Max, etc.
- **State Parks: Ichetucknee Springs, O'Leno State Park, Olustee Battlefield State Park:** As mentioned earlier, this region is fortunate to have unique state parks featuring gem-colored springs in nicely maintained park facilities. These parks can easily become one of the primary assets for recruiting visitors to the region. Just having one or two billboards showing the gem-colored springs would significantly help drive visitation to the region.
- **Campgrounds (information from [www.suwanneerivervalley.webs.com](http://www.suwanneerivervalley.webs.com)):**
  - **Casey Jones Campgrounds** - 185 SW Arrowhead Terrace, Lake City, FL 32024, 386-755-0471, 80 RV sites, bathhouse, flush toilets, drinking water, sanitary dump, camp store, picnic tables, recreation hall and pets allowed. <http://www.caseyjonesrvpark.com/>

- **E-Z Stop** - 181 SW Howell Street, Lake City, FL 32055, 386-752-2279, 17 RV spots with 11 pull-through 30 & 50 amp power, flush toilets, bathhouse, drinking water, picnic tables, barber shop/beauty shop, modem in office and convenience store about 500 feet from campground.
- **Itchetucknee Canoe & Cabins Campground** - 8587 Elim Church Road, Fort White, FL 32038, 386-497-2150, 866-224-2064, 14 Cabins, 16 RV sites, 17 tent or pop-up camper sites with water & electric, bathhouse, flush toilets, drinking water, tube yard, boat livery, convenience store, pavilion and no pets. <http://www.ichetuckneecanoeandcabins.net/>
- **Ichetucknee Springs Campground** - 245 SW Breckenridge Lane, Fort White, FL 32038, 386-497-2285, Bathhouse, flush toilets, drinking water and pets allowed. Our quaint tavern has two game rooms, a beautiful fireplace, pool tables, air hockey and several other games for the kids. We have a variety of food & beverages. Each campsite has a fire ring and picnic table. <http://www.ichetuckneespringscampground.com/>
- **In & Out RV Campground** - 3010 W US Hwy 90, Lake City, FL 32055, 386-752-1648, 95 Full hook up RV sites, cable available, bathhouse, flush toilets, drinking water, sanitary dump, camp store, laundry, gas, diesel, propane and pets allowed. <http://www.inandoutrvpark.com/>
- **Lake City Campground** - 4743 N US 441, Lake City, FL 32055, 386-752-9131, 40 RV sites, 12 tent sites, bathhouse, flush toilets, drinking water, sanitary dump, camp store, laundry, pool, picnic tables, recreation room, playground, fishing pond, campfires and pets permitted. <http://www.lakecitycampground.com/>
- **Lake City RV Park** - 2463 SW Main Boulevard, Lake City, FL 32025, 386-755-0110, 2 1/2 South of US 90 on US 441. 10 full RV hookups with cable and pets allowed.
- **Milton's Country Store & Campground** - 12049 N US 441, Lake City, FL 32055, 386-755-6975, Campground, groceries, restaurant, hunting & fishing supplies & license.
- **Never Dunn's Slow & Easy RV Park** - 929 SW Old Wire Road, Lake City, FL 32024, 386-755-4945, 30 full easy pull through RV hook-ups, 4 efficiency cabins, water & sewerage, laundry, animal runs, pets permitted. <http://www.neverdunn.org/>
- **Oak N Pines RV Park** - 3864 N US Hwy 441, Lake City, FL 32055, 386-752-0830, 67 RV sites, laundry facilities, bathhouse, flush toilets, drinking water, sanitary dump, cable hookups, electricity, recreation center with 24 hour modem and pets allowed. <http://www.oaksnpines.com/>
- **Ocean Pond Campground** - 24874 US Hwy 90, 386-752-2577 (Osceola Rangers District Office), 19 water and electric RV or tent campsites, 27 water only, 20 primitive, full shower and restroom, dump station, boat ramp and small pets allowed. No reservations taken, first come, first serve.
- **October Bend** - 2960 SE October Road, Lake City, FL 32025, 352-317-1326 or 386-755-6077, 14 pull through RV sites, 30 & 50 amp service, water, sewer, bathhouse, small pets allowed and no cable hook-up. Member of PassPort America. <http://www.octoberbendrv.com/>
- **O'Leno State Park** - 410 SE Oleno Park Road, High Springs, FL 32643, 386-454-1853, All sites will accommodate a tent, RV trailer or pop-up, pets are welcome overnight in all camping parks (pet rules apply), pets are not allowed in cabins or cabin areas, pets must be well behaved at all times and confined in the owner's camping unit during quiet hours, accessible picnic area, ADA accessible restroom, bank fishing, campground host, dumpstation, electric hook-ups, fish cleaning station, flushing toilet, handicap access, hot showers, laundry, picnic area, picnic shelter, tables and grills, potable water, playground, restroom, showers and nature trails. [www.floridastateparks.org/oleno](http://www.floridastateparks.org/oleno)
- **Hotels:** Listed on Smith Travel Research STR Report: 27 hotels with a total of 1,728 rooms for Lake City

- **Country Inn & Suites – 60 rooms**
- **Super 8 – 94 rooms**
- **Econo Lodge North Lake City – 61 rooms**
- **Hampton Inn & Suites – 89 rooms**
- **Fairfield Inn & Suites – 89 rooms**
- **Home2Suites – 86 rooms**
- **Motel 8 – 25 rooms**
- **Lake City Inn – 50 rooms**
- **Travel Inn – 33 rooms**
- **Roadway Inn Lake City – 44 rooms**
- **Holiday Inn & Suites Lake City – 127 rooms**
- **Quality Inn Lake City – 55 rooms**
- **Best Inn Lake City – 62 rooms**
- **America's Best Value Inn Lake City – 89 rooms**
- **Executive Suites – 68 rooms**
- **Days Inn Lake City I-75 – 117 rooms**
- **Days Inn Lake City I-10 – 62 rooms**
- **Gateway Inn Lake City – 50 rooms**
- **Ramada Limited Lake City – 64 rooms**
- **Baymont Inn & Suites Lake City – 82 rooms**
- **Comfort Suites Lake City – 94 rooms**
- **Budget Inn – 50 rooms**
- **Cypress Inn – 48 rooms**
- **Piney Woods Lodge – 28 rooms**
- **Travelodge Lake City – 52 rooms**
- **Driftwood Inn – 20 rooms**
- **Jasmine Garden Inn – 29 rooms**

**Hamilton County: Attractions and Amenities**

- **Stephen Foster Folk Culture Center State Park:** Anyone “Baby Boomer” age or older certainly knows the name Stephen Foster and most can probably sing at least a few lines of the song “Old Folks at Home” which is Florida’s State Song. The name, and the park’s location on the legendary Suwannee River make this a “must see” attraction when visiting the region. We were pleased to see the excellent condition of the grounds, the museum, the Craft Square (demonstrations), gift shop, and the 97-bell carillon. The park also offers seasonal events such as the spring Folk Festival and the Festival of Lights at Christmas, concerts, and a number of events related to the crafts facility. Visitors can camp, stay in one of five cabins, enjoy hiking and canoe trails, fish, geocache, bike, etc. It’s also a great location for weddings and family reunions.
- **Bienville Plantation:** Upscale guided hunting/fishing resort; weddings & events; 12 lakes; alligator, deer, duck, quail hunting; skeet shooting; five guest lodges (each with 5 bedrooms); main lodge for groups 30-50 people; full restaurant/food services;
- **Old Jail Museum:** Located in Jasper. Historic jail, built in 1893. Visitors can tour jail and living quarters of the sheriff and his family.
- **Hamilton Jai-Alai & Poker:** Jai-Alai was one of the earliest forms of gambling in Florida. This pari-mutuel gaming facility also offers live and simulcast betting on horse and dog racing. Well-maintained facility.
- **Town of White Springs:** This is a charming, historic riverside town with antique shops. Perfect for tourism. We noted a building with a sign that said “**Nature Heritage Tourism Center**” but it was closed and there was no information on the exterior.
- **Thomas Honey:** We saw this listed in a visitor brochure, but we could not locate the site. Later we learned it was actually in Lake City.
- **State Parks: White Springs State Park:** As mentioned earlier, this region is fortunate to have unique state parks featuring gem-colored springs in nicely maintained park facilities. These parks can easily become one of the primary assets for recruiting visitors to the region. Just having one or two billboards showing the gem-colored springs would significantly help drive visitation to the region.
- **Campgrounds (information from [www.suwanneerivervalley.webs.com](http://www.suwanneerivervalley.webs.com)):**
  - **Angies Moonshine Acres campground & Roosters Outfitters** - 10315 SE 141st Boulevard, White Springs, FL 32096, 386 397 2724 , 20 acres of wilderness camping complete with bathrooms and showers. Pets allowed. [rooster\\_thirteen@yahoo.com](mailto:rooster_thirteen@yahoo.com)
  - **Gibson Park** - 6884 SW CR 751, Jasper, FL 32052, 386-792-1631, Offers rustic camping or RV hookups, fishing, picnic tables, boating and canoeing. This campground beside the historical Suwannee River has new bathrooms with hot water. New perfect pinch boat ramps, no current and a floating boat dock for easy launch and recovery. <http://www.hcrecreation.com/gibsonpark.aspx>
  - **Jennings Outdoor Resort Campground, Inc** - 2039 Hamilton Avenue, Jennings, FL 32053, 386-938-3321, 102 paved pull through spots, 20-20-50 amp service, water, electricity, sewers, pool, playground, bathrooms, hot water, dump station and stock fishing lake. [www.jenningsoutdoorresort.com](http://www.jenningsoutdoorresort.com)
  - **Kelly's RV Park** - 142 NW Kelly Lane (US Hwy 41), White Springs, FL 32096, 386-397-2616, 58 full hook-up RV sites, bathhouse, flush toilets, drinking water, laundry, sanitary dump, camp store and pets allowed. <http://www.kellysrvpark.com/>
  - **Lee's Country Campground** - 2264 NW Thunder Street (SR 136 & I-75, exit 439), White Springs, FL 32096, 386-397-4132, 21 full hook-up RV sites, 17 water & electric, primitive tent sites, bathhouse, laundry, dump station, public phone, modem hook-up, horseshoes and pets allowed. <http://www.leescountrycampground.com/>

- **McCulley Farms Campground** - 3019 McCulley Farm Road, Jasper, FL 32052, 386-938-3011 or 386-938-1147, Home of the Withlacoochee Trail Ride. The trails here on the farm along with the 2000 acre Yellow Pine Forest are open year round. Clean bathrooms with hot showers, grill, picnic tables, and we now have over 100 covered stalls for your horses and more electric hookups included for \$20 per person each night. Day rides are also available and include a sage parking area to leave your truck/trailer with running water and bathrooms for \$5 per rider. We also have some of your basic camping needs like charcoal, ice and soft drinks. <http://www.muculleyfarms.com/>
- **Stephen Foster Folk Culture Center State Park** - White Springs, FL 32096, 386-397-2733, Offers 45 oak-shaded sites, all sites will accommodate a tent, RV, trailer or pop-up, pets are welcome overnight in all the camping parks (pet rules apply), pets are not allowed in cabins or cabin areas, pets must be well behaved at all times and confined in the in the owner's camping unit during quiet hours, accessible picnic area, ADA accessible restroom, bank fishing, campground host, dump station, electric hook-ups, fish cleaning station, flushing toilet, handicap access, hot showers, laundry, picnic area, picnic shelter, tables and grills, potable water, playground, restroom, showers and nature trails. This park is located on US 41 in White Springs. Driving directions from I-75 to SR 136 (Milepost exit 439 - old exit 84), travel east on SR 136 for 3 miles. Turn left on US 41. Park entrance is on the left. Driving Directions from I-10 to US 41 N (Milepost exit 301 - old exit 43), travel 9 miles to White Springs. Park entrance is on the left. [www.floridastateparks.org/stephenfoster](http://www.floridastateparks.org/stephenfoster)
- **Suwannee Valley Campground** - 786 NW Stephen Foster Drive, White Springs, FL 32096, 386-397-1667, 119 full hook-ups, RV pull through spots, shaded lots, primitive tents camping, drinking water, flush toilets, bathhouse, camp store, propane, shuffleboard, horseshoes, volleyball, basketball, chapel, pool, fishing & boating and pets allowed. <http://www.suwanneevalleycampground.net/>
- **Hotels:** Listed on Smith Travel Research STR Report: 1 hotel with 16 rooms in Jennings, 2 hotels with a total of 57 rooms in White Springs
  - **Jennings Inn** Jennings - 16 rooms
  - **Suwannee River Motel** White Springs – 17 rooms
  - **America's Best Value Inn** White Springs/Lake City – 40 rooms

**Suwannee County: Attractions and Amenities**

- **Suwannee County Museum:** Located in the Depot building in Live Oak; closed when we visited; Typically these museums are primarily a collection of historical artifacts from the history of the area; Since this type of museum tends to be operated by volunteers, it typically has limited hours of operation, and little interpretation that would make it of more interest to visitors.
- **Spirit of the Suwannee Music Park:** Interestingly, while working on this research project, one of our team members learned that her grandson, who lives in Boulder, Colorado, was coming for a music event at this unique facility! As its website states, this is a “one of a kind” 800-acre music park and premier campground located on the legendary Suwannee River. The park has some of the most extensive and unique camping facilities one can find *anywhere* including horse and rider camping, group camping, treehouse rentals, riverside camping, a variety of cabin rentals, etc. The park includes a craft village, a restaurant, disc golf course, pool, arcade game room, the Bat House, canoeing, and more. All this in addition to a full slate of music events.
- **Suwannee County Airport:** Small, corporate and public-use airport. No commercial air service.
- **Heritage Park and Gardens:** Former home/mansion of T.T. Scott, a local timber man who owned one of the last large sawmills in Suwannee County. He also owned the First National Bank in Live Oak. The gardens are a good example of north Florida landscape plantings. The park is a great venue for weddings, events, meetings, etc. Gardens are open every day from dawn to dusk unless otherwise reserved for a private event.
- **First Federal Sports Complex:** Adjacent to Suwannee Middle School. Approximately 5 fields, lighted, playground, covered picnic pavilions, restrooms, paved walking trail, tennis courts, skate park. No paved parking.
- **Suwannee County Fairgrounds:** In addition to typical fairgrounds, facilities for livestock and agriculture events, etc.
- **State Parks: Peacock Springs State Park; Suwannee River State Park;** All of the state parks in the Suwannee River Valley share common attributes including *gorgeous* and very popular springs, riverway connections, tubing, canoeing, etc.; We found at each well-maintained facilities, restrooms, interpreted hiking trails, picnic pavilions, etc. The parks are typically open from dawn to dusk daily and some offer camping.
- **Hotels in Suwannee County:** Listed on Smith Travel Research STR Report: 5 hotels in Live Oak with a total of 234 rooms
  - **Econo Lodge Live Oak – 52 rooms**
  - **Quality Inn Live Oak – 63 rooms**
  - **The Village Lodge Live Oak – 25 rooms**
  - **Holiday Inn Express & Suites Live Oak – 69 rooms**
  - **Sunshine Inn Live Oak – 25 rooms**
- **Campgrounds in Suwannee County:**
  - **Advent Christian Village** - 11057 CR 136, Dowling Park, FL 32060, 386-658-5100, Known primarily as a summer youth camp, Camp Suwannee is also a year round facility that serves youth and adult retreats, conferences, seminars, family events, school groups and many other organizations. Accommodating groups of up to 165 and offering excellent amenities in a peaceful atmosphere, amid the beauty of its natural surroundings, Camp Suwannee is an ideal setting for group getaways.  
<http://www.acvillage.net>
  - **River Run Campground** - 2739 US Hwy 27, Branford, FL 32008, 386-935-6553, Located near the suwannee River, Santa Fe River, Ichetucknee River and springs. 60 full hook-up sites which include water, electric & sewer, 30 primitive sites, bathroom,

laundry, playground, shelter pavilion and pets allowed. Kayak, canoe and tube rentals available. <http://www.riverruncampground.net/>

- **Sandy Point Motel & Campground** - 29685 59th Drive, Branford, FL 32008, 386-935-3824, Camp or lodge right on the Santa Fe River, which includes a boat ramp. <http://www.facebook.com/sandy-point-motel-campground>
- **Spirit of the Suwannee Music Park & Campground** 3076 95th Drive, Live Oak, FL 32060, [386-364-1683](tel:386-364-1683). Full service campground including full service restaurant country store, disc golf, inground swimming pool, full hookup sites including pull thru sites, accommodates big rigs, bathhouses, wi-fi, cable TV, horse stables, canoe outpost, boat ramps, on the beautiful Suwannee River. <http://www.musicliveshere.com>
- **Suwannee River State Park** - 20185 CR 132, Live Oak, FL 32060, 386-362-2746, Full facility camping, picnic tables, electric grill, standard at 30 campsites, restrooms, hot showers, ice available at ranger station and pets are allowed (rabies vaccination certification is required at registration). <http://www.floridastateparks.org/suwanneeriver>

### **Meeting/Convention Facilities in Columbia, Hamilton and Suwannee Counties**

As mentioned in the County listings above, while there are no typical "Convention Centers" within the region, there are a variety of small and medium scale meeting venues including university campuses, fairgrounds, country clubs, etc. Gray Research Solutions recommends developing a listing of these facilities and having that listing on the regional tourism website. That gives those selling facilities, as well as the regional tourism marketing group, a useable tool that provides consistent data for each site.

Having more meeting facilities would definitely help increase weekday occupancy, which as noted in the Lodging Report section of this report *is* a priority. However, without dedicated sales and management staff this type of investment should be entered into with caution. Many smaller destinations that have built such facilities find they are primarily only utilized by local/regional groups if there is not dedicated and professional sales staff to recruit meetings and events. Thus, Gray Research Solutions does not at this time recommend developing new meeting facilities. We do recommend first developing an inventory of existing facilities and having that listing on the regional website. Over time, a "lost business" report can be developed which documents potential business that is lost due to lack of appropriate facilities. Only when there is sufficient need documented would it be wise to invest in new facilities. Further, when the time comes to seriously consider developing new facilities, Gray Research Solutions recommends that *likely potential* meeting planners be contacted to determine *exactly* what type of facility is desired. Basically the region wants to "build to suit" likely meeting prospects so they can be relied upon for bookings.

### **Event Facilities (Weddings, Reunions, etc.)**

The three-county Suwannee River Valley region has a good supply of wedding, family reunion, and event facilities including high-end properties such as Bienville Plantation and more modestly priced options such as the state and community parks, as well as the unique Spirit of the Suwannee Music Park.

Gray Research Solutions recommends developing a user-friendly inventory of these numerous facilities and providing that information on the regional tourism website as well as the printed visitor guide.

## **Outdoor Recreation, Sports, and Team/Tournament Facilities in Columbia, Hamilton and Suwannee Counties**

### **Team Sports**

As noted under each county above, we visited a variety of parks with facilities for baseball, softball, tennis and soccer, etc. The region has adequate facilities for team sport/event recruitment. Given the Smith Travel Research data, it should be a priority to book *weekday* sports events as weekdays now have less lodging activity than weekends. As noted in the recommendations, tracking lodging activity and sharing that with sports and event recruiters may help balance out the lodging patterns.

Also, as noted in the recommendations, Gray Research Solutions does not, at this time, recommend development of new/additional sports facilities. First, we recommend developing an inventory of use for current facilities and sharing that among those who book these facilities. Once a pattern of "lost business" can be established it will lead to wise sports facility/event facility development. Similarly, if any of the regional counties/cities are interested in developing new sports facilities, it would be wise to first document *likely potential users*, then do some pre-build investigation to determine if new facilities were built, exactly what is needed. That will prevent development of facilities that suffer from little use. One wants to document *the most lucrative unmet sports/meeting needs* first before committing to building.

### **Kayaking, Canoeing, Tubing, River Sports**

The gem-colored springs, connected by tea-colored rivers makes for a unique water adventure in this region that is highly compelling. Just getting into the gem-colored springs is simply a "must do" opportunity. And, again, these springs are all managed as part of state parks, ensuring they have the parking and restroom facilities, as well as the trails, stairs, etc. to ensure safety and comfort. What an amazing asset! Additionally, our team noted several companies that provide facilitation such as tube and equipment rentals, guided trips, etc. Gray Research Solutions believes the uniqueness of these springs makes this the top visitor attraction for this region.

### **Cave Diving**

This region is identified as one of the top cave diving destinations in the *world*. This alone makes the region noteworthy. However, this is an activity that appeals to a small percentage of the general traveling public. It is highly recommended that the regional tourism marketing group work with local providers/facilitators to inventory and promote this unique activity. However, it is also important to consider the total lodging and spending driven by this relatively small segment. While it is a highly unique tourism activity, it would be good to measure the overall spending generated by this segment before investing a significant portion of the limited marketing budget.

### **Birding, wildlife watching and naturalist activities**

The Suwannee River Valley is a naturalist's paradise. The highly sought after manatees live here year-round. Turtles, racoons, alligators, and a good range of wildlife are plentiful and easily found. Additionally, everywhere we went we saw birds of all varieties and in beautiful natural settings. This is a growing visitor segment and one that the region can well claim. Again, what is needed is *orientation and facilitation*. In this case this means an inventory of where birders and nature lovers can go, park the car, and be allowed to engage in naturalist activities. It would also be great to provide a guide to common flowers, plants, wildlife to look for in the region. Getting outside in nature is an activity that is growing in popularity, especially among aging Baby Boomers – one of the largest likely visitor populations in this region.

### **Golf**

Our team noted a good variety of golf courses in the Suwannee River Valley that are available to the travelling public. When analyzing golf courses our team considers the following: availability of tee times for the traveling public, price and quality ratio, availability of packages, proximity of accommodations and dining, as well as unique aspects to the golfing experience. It must be noted that golfers prefer courses that offer a challenge, a unique setting, excellent conditions and reasonable rates. However, many golfers will pay very high fees for a unique golfing experience. The overall impression of golf in the Suwannee River Valley is that the golf product has broad appeal to the middle of the road golfer, the snow-bird retiree and the vacation golfer looking to play a new course. Many of the existing courses in the region are semi-private and include the words "Country Club" in their names which make it very difficult for the potential visitor to discern which courses are playable and which ones are not open to the public. Again, having those that are available to the public listed in the regional visitor guide and on the website is recommended.

### **Scenic Drives**

Yes, today *cows* are tourist attractions! Getting off the busy interstates, and driving the scenic backroads throughout the region is a pleasant activity that visitors enjoy. Just getting to see the landscape, the farms/pastures, the rural life, is appealing to many. This is a growing trend, especially among the increasing volume of retired Baby Boomers. They visit regions, and spend time just driving around to see the place and find little "gems." These small tourism "gems" become bragging rights on Facebook and to their friends/families back home. The visitors seek out Scenic ByWays and other enjoyable driving routes. Providing suggestions for attractive scenic driving to these visitors is recommended on any maps and/or visitor brochures and information.

### **Geocaching**

Again, this is a steadily growing visitor activity. Be sure to list any existing geocaches on the regional tourism website and visitor guide.

### **Shopping in Columbia, Hamilton and Suwannee Counties**

Nationally, shopping is the most popular activity while traveling. In fact, recent studies have shown travelers rate their vacation experience higher based on higher levels of retail spending. In other words, the more money spent shopping, the better the vacation. This is particularly the case in resort destinations. Large outlet malls have been cropping up in America to take advantage of this trend. That first rainy day of vacation delivers overflow crowds to the large malls, where vacationers accomplish back-to-school, household, gift and Christmas shopping. A full year's worth of shopping can take place in a matter of days! This is in addition to the traditional souvenir buying that remains popular for travelers. Therefore, shopping is an important attractor for a community and a major area of economic impact for the local economy.

The Suwannee River Valley region has a good, sizeable shopping mall in the Lake City Mall, plus a good volume of convenience stores throughout the area, and some scattered unique shopping such as Thomas Honey. It is recommended that an inventory of unique shopping (***homemade, artisan-made, handmade, craft, farm-grown, etc.***) be developed by regional tourism promoters and that the listing be on the regional tourism website. It would also be good if such a listing could be in the regional printed visitor guide.

### **Restaurants & Dining in Columbia, Hamilton and Suwannee Counties**

When visiting an area we always look for the unique dining experiences that would appeal to travelers. When in Maine most folks look for lobster, pineapples in Hawaii and TexMex in the

southwest. During reconnaissance, we asked local people on the street, at attractions, and at other encounter points where to find good local food. The dining spots mentioned most often when we requested recommendations were restaurants offering home cooking or chain restaurants.

It is impossible for our team to experience every restaurant in the area. We try to dine at those advertising themselves the most or are most visible to the traveling public. We also concentrate on those which receive the most recommendations from local residents and front line employees in the travel industry. Our goal is to locate the establishments most likely visited by travelers to the area.

In asking local residents to recommend a good local flavor restaurant the overwhelming majority of recommendations were for the following restaurants:

- Marion Street Deli & Pub (Lake City)
- Jessica's Bistro (Lake City)
- Shirley's Restaurant (Lake City)
- All Decked Out Café (Live Oak)
- Old Times Country Buffet (Lake City)
- Dixie Grill and Steer Room (Live Oak)
- Crossroads Grill (Jasper)

Gray Research Solutions recommends providing a list of both chain and "Local Flavor" non-chain eateries in the three-county region. The listing can be a simple name with a "descriptor line" such as "local farm-to-market cooking" or "fresh made hamburgers, sandwiches, etc." Chains, of course, do not need a descriptor listing as travelers generally know what is offered at each.

**Lodging in Columbia, Hamilton and Suwannee Counties**

When conducting reconnaissance in an area, the team always looks for lodging that would most likely appeal to the vast majority of the traveling public. Therefore, the Reconnaissance Team selects its lodging for the reconnaissance using the marketing materials provided by the local tourism promotion agency, the state and brochures found along the way in racks. Once in the area, the Reconnaissance Team looks at all available lodging properties to determine the range of lodging options available in the area. The team also looks to see if the national chain properties are well maintained and locally owned properties are adequately advertised and represented correctly in promotional materials. The Reconnaissance Team evaluates a range of lodging properties typical of the area to ensure our understanding of the experience from the visitor perspective.

**Overall**

The 3-county Suwannee River Valley Region has over 50 hotel/motel/Inn lodging properties representing approximately 2,090 lodging rooms, according to Smith Travel Research STR Report. As is typical, most commercial lodging properties are located along interstates, major roads, and other peak traffic points. Gray Research Solutions observed the range of lodging properties and found it to be a typical mix of older and newer properties, with the majority (36) being economy class lodging, along with approximately (7) mid-scale, and (7) upper mid-scale properties (STR categories). Upper midscale properties typically include Hampton Inn, Holiday Inn Express, Fairfield Inn, Home2Suites, etc. There is no upscale category lodging. The Lodging Report in this study provides more detail on the lodging industry in the region. It is fortunate that again, the steady flow of available customers generated by I-75 and I-10 keep this region supplied with good lodging.

In addition to hotels/motels, there are vacation rental agencies representing a wide range of vacation homes, primarily near the state parks and springs, as well as the towns in the region. AirBnB and other on-line vacation rentals also provide options for those seeking non-hotel lodging.

Camping is well accommodated in this region. It is exceptional to have a facility such as the 800-acre Spirit of the Suwannee Music Park, and this property alone, almost makes lodging in this region a different type of enterprise. As is often quoted on TripAdvisor, "This is one of the best music venues in the world!" It is home to music events, festivals of all types, family reunions, Festival of Lights, huge gatherings, miles of trails, as well as three miles frontage on the Suwannee River. Here one can find rental cabins, treehouses, duplexes, semi-private group camping settings, horse camping, standard camping, RV parking/camping, and outdoor gatherings of extensive variety. There is a craft village, cafes and food trucks, and activities including canoeing, disc golf, arcade games, cycling, fishing, etc.

According to knowledgeable in-area lodging professionals, weekday business needs boosting more than weekends. According to the STR Report weekend business is generally over 70%, while weekday business tends to be 40-60%. Typically this indicates the need to increase group business such as conventions/meetings, corporate training, etc. These groups typically depend upon having the right mix of corporations and facilities, such as convention centers, or major training facilities.

**Campgrounds and RV Parks in Columbia, Hamilton and Suwannee Counties**

A listing of campground and RV parks is included in this report under each of the three counties the Gray Research Solutions team visited. As is typical of this part of Florida, there is a sizeable quantity of camping and RV parking availability. Snowbirds can be counted on every year to take advantage of much of this camping availability. Similarly, retired Baby Boomers are taking to the roads of the U.S. in record numbers to travel leisurely, often camping the limit amount of time in state parks, etc. as they leisurely travel the country. Providing a listing of camping sites, along with pertinent data on each, is recommended for the regional tourism marketing group. This listing should be on the tourism website and preferably in the printed visitor guide. As with the lodging listing, a grid format is preferred by the visitor as it helps them quickly ascertain what amenities they can find in each.

## Performance Review and Status

This section provides an in-depth performance review and analysis of the SRVMG. It includes documentation and analysis of the organizations governance, mission statement, funding, staffing, budget allocations, results measures and program performance.

### Suwannee River Valley Overview

Florida's Suwannee River Valley is a group of three counties in north central Florida (Columbia, Suwannee, and Hamilton).

### Suwannee River Valley Marketing Group (SRVMG)

#### Governance

In 2010, Columbia County, Hamilton County, and Suwannee County entered into an interlocal agreement creating Florida's Suwannee River Valley Marketing Group and thereby creating a separate legal entity. The agreement states that *"the parties hereto desire to make the most efficient use of their resources and powers to cooperate for their mutual advantages to promote tourism development within the region."*

- The purpose of the agreement was to promote the natural, historic and cultural attractions of the region in order to increase the number of visitors and extend visitor stays.
- The goal is to enhance the region's economy, image and quality of life through expanded revenues and employment opportunities, while encouraging the preservation of the very resources which bring focus to the region.

#### Mission Statement

The SRVMG does not currently have an organizational mission statement. The Columbia County TDC (which handles operational processes and manages the regional effort) does have a Mission statement:

*The Columbia County Tourist Development Council (TDC) will enhance the local economy and quality of life through the benefits associated with a strong visitor industry. The tasks are to maximize the number, length of stay, and economic impact of visitors to Columbia County. Tourism is economic development. To stimulate the economy of Columbia County through the investment of Tourist Development funds in events, programs and facilities that generate and support tourism and conventions, maintain and increase visitor spending, and thereby improve this County's position in the tourist and convention industry.*

#### Offices and Staff

The SRVMG is run by a 6 member board, with organizational meetings convened by the Executive Director of Columbia County Tourism (Paula Vann). Offices are located within the Columbia County TDC office at 971 West Duval St. in Lake City, FL.

Staff members, board members and volunteers and their roles include:

- Paula Vann, Executive Director of Columbia County TDC and Sports Commission, Executive Director of Florida's Suwannee River Valley, and Columbia County Public Information Officer (Since November 2014)
  - Vann oversees the strategic direction of the tri-county marketing group, manages all finances, administrative duties, sales, advertising, promotion, and writes and administers the Florida Department of Economic Opportunity grant for Florida's Suwannee River Valley.

- Vann is a voting member of Florida's Suwannee River Valley and is currently the Finance Chair.
- These duties are in addition to her role as Executive Director of the Columbia County TDC, Columbia County Sports Commission and Public Information Officer for Columbia County.
- Greg Scott, Director Suwannee Parks and Recreation and Suwannee County Airport
  - Gregg has served as a voting board member of Florida's Suwannee River Valley since 2011. He has primarily served in an advisory capacity, however, in 2016 he assisted in the website development project.
  - Currently, Greg is board chairman.
  - This is a volunteer role and the duties listed above are in addition to his role as Director of Suwannee Parks and Recreation and Suwannee County Airport.
- Teena Peavey, Marketing Director, Spirit of the Suwannee Music Park
  - Teena has served as a voting board member of Florida's Suwannee River Valley since 2011. She has primarily served in an advisory capacity; however, she took on the marketing chair roll in 2015.
  - Teena manages the marketing committee, makes recommendations for marketing initiatives and attends tradeshow on behalf of Florida's Suwannee River Valley. Additionally, this year Teena oversaw the *Suwannee County Restaurants and Hotels Brochure*, *Things to Do in Suwannee River Valley Brochure*, Website, Phone App and Social Media Campaign.
  - This is a volunteer role and the duties and projects listed above are in addition to her role as Spirit of Suwannee Music Park Marketing Director.
- Rod Butler, General Manager, Holliday Inn and Suites Lake City
  - Rod has been a voting board member of Florida's Suwannee River Valley since 2011. He has primarily served in an advisory capacity. However, in 2016, he oversaw the billboard projects for the marketing group.
  - This is a volunteer role as his primary occupation is acting as the GM of Holliday Inn.
- Cody Gray, Marketing Manager, Columbia County TDC and Columbia County Assistant Public Information Officer (Since March 2015)
  - Cody is a voting board member for Florida's Suwannee River Valley, and assists or oversees several marketing initiatives for the tri-county marketing group. Projects include: FSRV Vacation Guide, Promotional Items, Visit Florida Welcome Center tradeshow, and hospitality staff training.
  - These duties are in addition to his role as Columbia County Marketing Manager and Assistant Public Information Officer.
- Additional Volunteers:
  - Brittney Archer, Administrative Assistant, Spirit of the Suwannee Music Park
    - a. Brittney oversaw the lead-generation campaign and attended tradeshow on behalf of FSRV in 2016.
  - Amy Conyers, Park Manager, Suwannee River Wilderness Trail
    - a. Amy oversaw the Springs Brochure and Waterproof Boat Ramp Map projects in 2016.
  - Jimmy Johnson, General Manager, Bienville Plantation
    - a. Jimmy assisted in scouting billboard locations and attended tradeshow on behalf of FSRV in 2016.

- Jennifer Miller, Assistant Park Manager for Five State Parks (Lafayette Blue Springs State Park, Peacock Springs State Park, Troy Spring State Park, Suwannee River Wilderness Trail, and Forest Capital Museum State Park)
  - a. Jennifer assisted Amy Conyers with the Springs Brochure and Waterproof Boat Ramp Map project in 2016.
- Michelle Moore, Administrative Assistant, Columbia County TDC
  - a. Michelle managed all clerical and purchasing paperwork on behalf of FSRV. Additionally, she was responsible for packing all materials and loading the van for tradeshow.
- Andrea Thomas, Park Services Specialists, Stephen Foster State Park
  - a. Andrea assists in our graphic design artwork and billboards. Additionally, she attends tradeshow to represent Florida's Suwannee River Valley.
- Carol Walker, Special Events Coordinator, Spirit of the Suwannee Music Park
  - a. Carol oversaw the Campaign Pop-ups for Hotels and Campgrounds and attended tradeshow on behalf of FSRV in 2016.

**SRVMG Funding**

SRVMG funding is tied to partnership participation and grants rather than lodging tax revenue. The SRVMG is funded through various sources which include the following:

- Florida Department of Economic Opportunity Grant
- Participating County Buy-ins
  - Columbia County: 72% of matching funds
  - Hamilton County: 11% of matching funds
  - Suwannee County: 17% of matching funds

	2012	2013	2014	2015	2016
<b>Florida Department of Economic Opportunity</b>	\$16,471				\$50,000
<b>Columbia County</b>	\$53,529	\$60,000	\$64,000	\$25,000	\$36,000
<b>Hamilton County</b>		\$4,000		\$4,000	\$5,500
<b>Suwannee County</b>		\$6,000	\$6,000	\$6,000	\$8,500
<b>Total Marketing Budget</b>	\$70,000	\$70,000	\$70,000	\$35,000	\$100,000

In 2015 no results or initiatives were tracked due to restructuring and budget.

In 2016 the SRVMG budget more than doubled based on receiving a FL EDO grant for \$50,000. The next five years of marketing efforts will depend on this important grant to maintain the budget. In order to receive the grant, all three counties must fund a portion of the marketing budget, and the SRVMG must remain a regional partnership.

The grant has allowed the SRVMG to fund this strategic plan, purchase media and advertising to raise awareness of the region, and track the following statistics:

1. Website traffic and Google analytic stats
2. Social Media Engagement
3. Visitor Counts (and visitor origin location when available) from Area Attractions
4. Bed tax Collections: Columbia, Hamilton, and Suwannee Counties

As is the standard for the tourism industry, all monies collected in lodging occupancy taxes (and the portion of same used to fund the SRVMG) should be spent only for direct sales, promotion and marketing. It is NOT recommended that destination marketing organizations fund or

“subsidize” attractions such as museums. The SRVMG board and Columbia County TDC staff have demonstrated solid fiscal responsibility for the appropriate use of SRVMG funding sources.

**SRVMG Inquiry Records and Statistics**

The primary purpose of a destination marketing organization (DMO) is to advertise the destination to generate visitors and inquiries that are “fulfilled” by mailing a package of visitor information. This effort is intended to generate increased visitation to the destination, which creates economic impact as a result. One method of measuring the impact of the DMO’s advertising efforts is to look at the number of inquiries that are generated each year. The true test of the success of the DMO’s marketing efforts comes from research that determines the number of inquiries that are “converted” to actual visits and economic impact.

GRS recommends that the SRVMG collect, document and maintain a database of inquiries to enable conversion to be measured annually.

**Direct Visitor Spending/Tourism Revenues**

Total 2015 Tourism Revenues for Tourism in Suwannee River Valley (for visitors staying in hotels only):

470,989 Sold hotel nights in Suwannee River Valley (STR 2015 data)  
 x 1.8 Average party size of Visitors to North Central FL (FL 2015 Visitor Profile)  
 x \$109 Average Daily Expenditures of Visitors to N. Central FL (FL 2015 Visitor Profile)

**\$92,408,041** Direct Visitor Spending of HOTEL visitors to Suwannee River Valley

Does not account for:

- Campground visitors
- Daytrippers
- I-75/I-10 stops
- Visiting friends/relatives

**Estimated Tax Relief from Tourism in the Columbia-Hamilton-Suwannee County Region**

The table below illustrates the taxes levied on visitors to the SRV region and the number of households in each county and in total. Tourist Development taxes go to fund the TDCs in each county, and aren't included in any tax revenue calculations. In addition to the tourism development taxes (5% in Columbia County and 3% each in Hamilton and Suwannee Counties), visitors pay 6% state sales tax and 1% additional sales tax in each of the three counties.

County	Households	Tourist Development Tax	FL Sales and Use Tax	County Sales and use tax
<b>Columbia County</b>	24,941	5%	6%	1%
<b>Hamilton County</b>	4,617	3%	6%	1%
<b>Suwannee County</b>	15,963	3%	6%	1%
<b>Total Households</b>	45,521			

Since we know the estimated direct visitor expenditures in the combined three counties (\$92,408,041), we can estimate the total sales tax (state and local taxes, but NOT tourist development taxes) paid by visitors. In 2015 visitors generated nearly \$1Million in county taxes and over \$5.5Million in state taxes with a total of nearly \$6.5Million. By dividing the total taxes generated by the number of households in the three counties, we see below that because of hotel visitors in SRV (not even including the spending of campground visitors, friends and family visitors, daytrippers or stops from the interstate), **each household pays at least \$142.10 less in state and local taxes.**

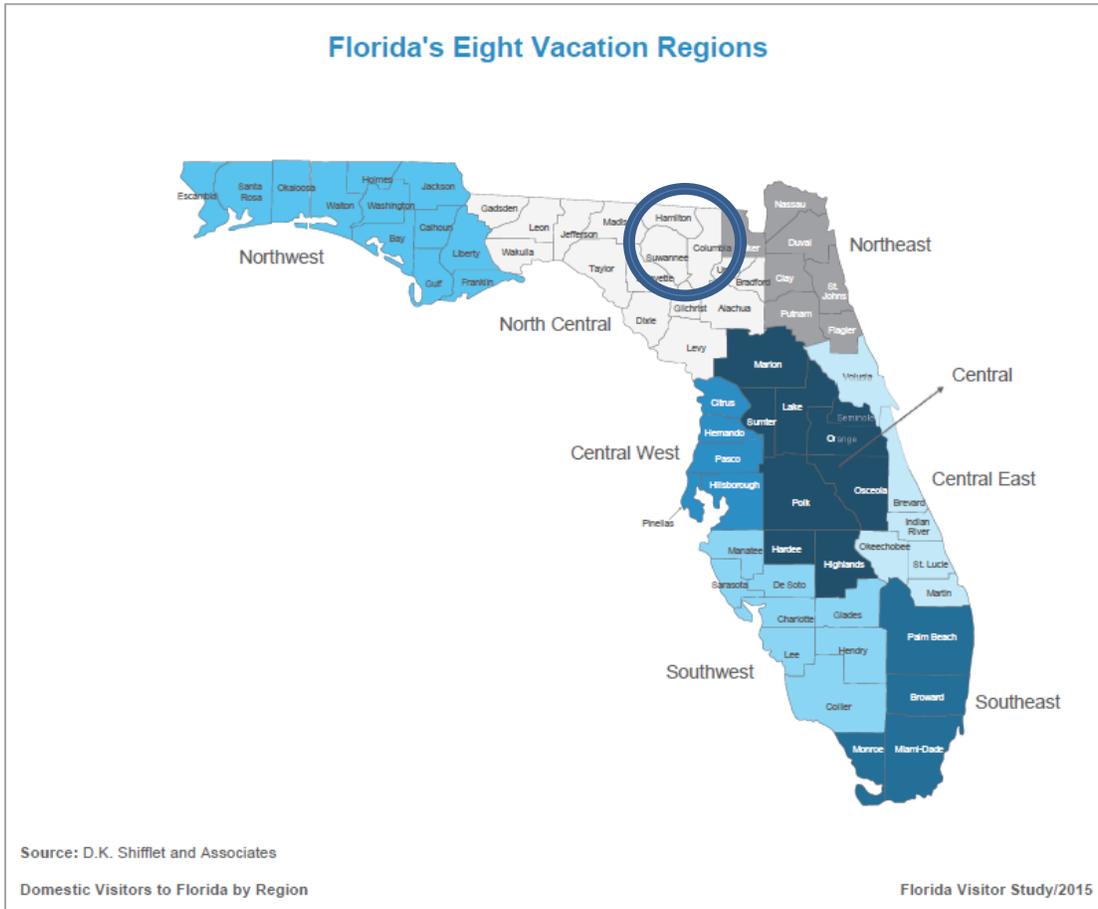
	County 1% Sales Tax	State 6% sales tax	Total
<b>Tax revenue generated in SRV</b>	\$924,080	\$5,544,482	\$6,468,563
<b>Tax Relief per Household in SRV</b>	\$20.30	\$121.80	\$142.10

**Florida Visitor Profile Research**

Visit Florida provides its partners with Visitor information, helpfully divided by region. The three counties that make up Suwannee River Valley are in the North Central Vacation Region of Florida.

Overall, in the state as a whole:

- 85.7% of Florida's visitors are domestic travelers
- 1.9 million visitors come to Florida on any given day
- 105 Million visitors to Florida in 2015
- Tourism had a state-wide economic impact of \$89.1B in 2015



According to Visit Florida's 2015 *Profile of Domestic Visitors by Florida Region*,

*The North Central region had the largest percentage of visitors traveling to visit friends or relatives (37%), when compared with the other vacation regions. Travelers who visited the North Central region had the lowest average expenditures per person per day, in comparison to the other regions. Domestic travel to this region most often occurred during the spring. The Silent/ GI generation group represented 21 percent of visitors to this region, the highest percentage observed among the regions. Camping in the North Central region ranks higher as a primary activity than any other region in the state.*

Visitors to the North Central Region (summarized in the chart below):

- Average party size: 1.8 visitors
- Average expenditures: \$109 per person per day
- 2% of Florida's visitors come to the North Central Region of Florida, or 2.1 Million per year
- North Central Region had the highest percentage of visitors traveling to visit friends and relatives (37%), and the lowest average daily expenditures.
- Strongest visitation season for the North Central Region is Spring.
- Camping in the North Central Region ranks higher as a primary activity than any other region in the state.
- Median Traveler Age: 54 (51% of North Central Region travelers are 55+)
- Average Stay: 1-3 nights (77% of travelers)

Source: Visit Florida Visitor Study, 2015

### North Central Vacation Region

The North Central Vacation Region is made up of the following counties: Alachua, Bradford, Columbia, Dixie, Gadsden, Gilchrist, Hamilton, Jefferson, Lafayette, Leon, Levy, Madison, Suwannee, Taylor, Union, and Wakulla. The North Central Vacation Region is home to Florida's capital and many natural attractions.

Age of Adult Traveler	
18-34 Years Old	18%
35-54 Years Old	31%
55+ Years Old	51%
Average Age	53.0
Median Age	54.0

Household Income	
Under \$50,000	46%
\$50,000 - \$74,999	16%
\$75,000 - \$99,999	10%
\$100,000 - \$149,999	15%
Over \$150,000	14%
Average HH Income	\$85,700
Median HH Income	\$54,100

Top Origin States	
Ohio	13%
Georgia	12%
Tennessee	11%
Illinois	9%

Type of Transportation	
Air	14%
Non-Air	86%

Accommodations	
Paid	56%
Hotel Paid	42%
Non-Hotel Paid	14%
Non-Paid	44%

Seasonality	
Winter (Dec - Feb)	23%
Spring (Mar - May)	37%
Summer (Jun - Aug)	27%
Fall (Sep - Nov)	13%

Purpose of Trip	
Leisure	95%
Visit Friends/Relatives	37%
Vacation/Getaway Weekend	26%
Other Leisure	32%
Business	5%
Transient Business	3%
Group Meetings	2%

Average Expenditures (per person per day)	
including transportation	\$109
excluding transportation	\$65

Length of Stay	
1-3 nights	77%
4-7 nights	18%
8+ nights**	5%
Average	2.7 nights
Median	2.0 nights

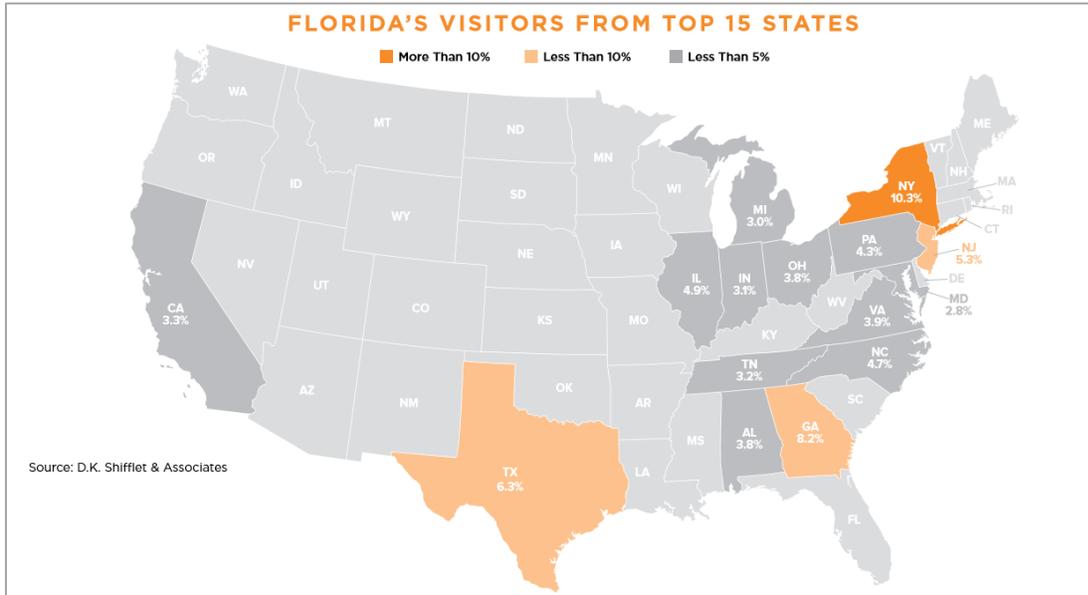
Travel Party Composition	
One Adult	45%
Couples*	37%
Families	8%
Other	10%
Average Number on Trip	1.8
Median Number on Trip	1.1

Top Activities (multiple response)	
Visit Friends/Relatives	36%
Culinary/Dining Experience	23%
Shopping	20%
Parks (national/state)	18%
Camping	14%
Beach/Waterfront	13%

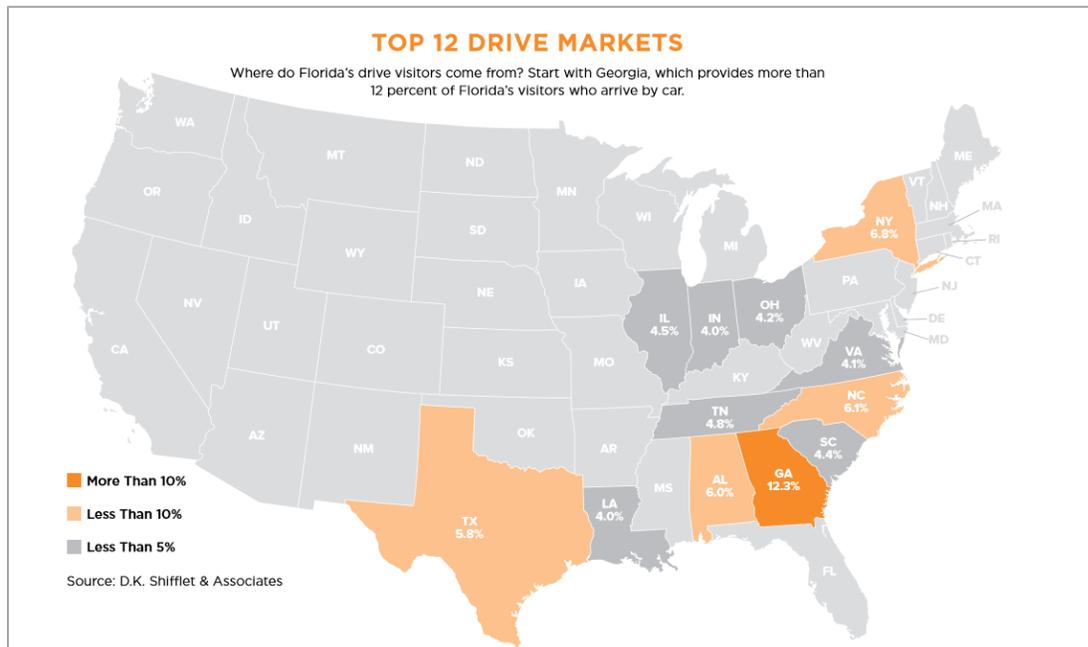
Note: Totals may not add up due to rounding  
 \*A couple is defined as one male and one female  
 \*\*Based on a small sample size  
 Source: D.K. Shiffet and Associates

Domestic Visitors to Florida by Region Florida Visitor Study/2015

As referenced in the maps below, Florida's top visitor states of origin are New York, Georgia, and Texas.



However the state's top drive markets are Georgia, Alabama, North Carolina, New York, and Texas. Because of the SRV regions location at the confluence of I-10 and I-75, GRS recommends prioritizing drive markets over fly markets.



**Profile of Most Likely Visitor**

Based on the information provided by Visit Florida, and data collected from Suwannee River Region hotels and campgrounds, the following is the most likely visitor profile for the Suwannee River Region:

**Most Likely Visitor Profile:**

- Drive visitors (I-75 and I-10)
- Primary Points of Origin: GA, AL, TX, NC, NY
  - Secondary Point of Origin: LA, SC, TN, VA, OH, IL, IN
  - Outdoor Recreational Visitor Point of Origin: FL, GA, AL
- Trip Purpose: Passing Through, Business, Visiting Friends & Relatives, Event (weddings, family reunions, etc.), Outdoor Recreation
- Length of Stay: 1-3 nights
- Repeat Visitor
- Age: Majority is 55+, secondary is 30-55
- Typical Travel Party: 1-2 adults
- Seasonal: More "snowbirds" in spring and winter, more families in summer, more regional in fall.

**Analysis: Recommended Methods for Reaching Most Likely Visitors**

Based on analysis of all available data, as well as professional experience with similar destinations, Gray Research Solutions recommends the following as best options for reaching most likely visitors:

- Website
- Mobile App (mobile version of website)
- Florida Visitor Center (I-75 and Georgia State Line): Recommend development of "showcase area" in partnership with center
- Billboards
- Visitor Guide: Placed in hotels within the 3-county region
- Tear-off maps: Placed at all regional hotels, attractions, etc.
- PR and Travel Writer Solicitation

**Lodging Study and STR Analysis**

Gray Research Solutions (GRS) conducted a survey of the hotel/motel/inn and campground/RV Park properties located in the Suwannee River Valley Region at the request of the Suwannee River Valley Marketing Group (SRVMG). A one-page questionnaire was written by GRS, approved by SRVMG and sent to lodging properties in Columbia, Hamilton and Suwannee Counties to determine the following for the 2015 calendar year: percentage of occupancy driven by five (5) primary market segments, walk-in reservations, travel party information, top leisure feeder markets, percentage of taxable revenue and a priority ranking of future target market segments. The lodging survey was conducted during the months of October through December 2016.

**Summary of Lodging Statistics and Survey Findings**

- Leisure visitors account for 24% of hotel guests, and 74% of campground guests in the Suwannee River Valley.
- Transient visitors account for 35% of hotel guests, and 18% of campground guests.
- Business travelers comprise 29% of hotel guests and 0% of campground guests.
- Conference/Meeting guests comprise 12% of hotel guests and 8% of campground guests.
- For both campgrounds and hotels, spring is the busiest travel season followed by fall.
- Hoteliers report an average of 33% of travel parties are walk-ins without advance reservations.
- For hotels the average yearly occupancy has increased around 32% since 2011, from a high of 47% occupancy in 2011 to a high of 61% in 2015.
- 70% of hotel visitors and 47% of campground visitors are adults traveling WITHOUT children.
- Campground visitors tend to travel in a party of 3.33 and stay for an average of 10 days.

**SRV Lodging Inventory**

The Suwannee River Valley region encompasses three (3) counties. Most of the region's hotel lodging rooms are in Lake City (Columbia County). There are currently 43 hotel/motel properties representing 2,238 rooms in the region and approximately 25 campgrounds/RV parks representing 1,128 RV sites/pads.

County	# of Hotels/ Motels	# of Rooms	% of Regional Room Inventory
Columbia	28	1743	78%
Suwannee	8	279	12%
Hamilton	7	216	10%
<b>Total</b>	<b>43</b>	<b>2238</b>	<b>100%</b>

(source: SRVMG, STR)

In addition to hotel/motel rooms, 25 campgrounds and RV parks are available throughout the region (figures below are for RV sites only; many campgrounds offered "unlimited" primitive campsites).

- Columbia (10 RV sites)
- Suwannee (7 RV sites)
- Hamilton (8 RV sites)

(source: SRVMG)

Lodging Property Type	Total Lodging Properties	Rooms/Sites
<b>Hotels/Motels/Inns</b>	43	2238
<b>Campgrounds*</b>	25	1128

\* Campground counts include RV sites (not primitive camping) (source: SRVMG, STR)

**Market Segmentation**

When marketing tourism to a destination it is critical to have an understanding of the different customer segments that drive occupancy in local lodging properties. This data provides an understanding of the categories that drive the greatest economic impact for the area and the most lodging tax that funds the SRVMG marketing budget. The chart below reveals the overall market segmentation as reported by the fourteen (14) hotel/motel properties (730 rooms) and eight (8) campgrounds (361 RV sites) that participated in the study. Most lodging properties do not track the primary trip purpose of all of their guests, so this data is based upon the management team at each property interpreting the data they have on hand and their close personal knowledge of their customer mix.

**2015 Lodging Market Segmentation**

2015 Campgrounds (1128 RV sites)	2015 Hotels/Motels/Inns (2238 rooms)	Annual Overall Market Mix (Segments):
32%	33%	Response Rate
<b>74%</b>	<b>24%</b>	<b>Leisure</b>
22%	7%	Leisure—Visiting Local Friends and Relatives
26%	6%	Leisure—Tourists visiting SRV area local attractions, outdoor recreation, etc.
19%		Leisure—Campers staying as part of an overall trip to Florida
4%	5%	Leisure—Hunting and Fishing
	4%	Leisure—Staying here to attend a specific event (concert, festival, etc.)
3%	2%	Individual (non-group) Sports
<b>0%</b>	<b>29%</b>	<b>Business</b>
	13%	Individual business travelers (white collar)
	16%	Blue collar workers (mineral industry, commercial, construction laborers, etc.)
<b>18%</b>	<b>35%</b>	<b>Transient</b>
18%	35%	Passing through as part of a longer trip along I-10 or I-75
<b>8%</b>	<b>12%</b>	<b>Conference/Meeting/Group</b>
	4%	Conferences/Meetings
4%	3%	Sports events (games, tournaments, etc.)
4%	5%	Weddings/reunions/family events/social events
Equestrians, snowbirds	Pipeline workers, government, cave diving	<b>Other</b>

(source: GRS 2016 Lodging Study)

The leisure segment occupies the majority of lodging available in SRV, with a 2015 average of 74% for campgrounds and 24% for hotels. When combined this total includes the following (in rank order): tourists visiting the local attractions and outdoor recreation, visiting local friends and relatives, campers staying as part of an overall trip to FL, hunting and fishing, staying here to attend an event and individual sports.

The next largest segment is transient, making up 18% of campground visitors and 35% of hotel visitors. These are tourists passing through as part of a longer trip along I-10 or I-75. Business travelers make up 29% of hotel nights, and conference/meeting/group make up 8% of campgrounds and 12% of hotels.

From 2015 to 2016 (YTD through Oct 2016), hotels saw a 1% decrease in transients and tourists visiting local attractions, and a 1% increase in blue collar workers (e.g. pipeline workers). Campgrounds saw a 1% increase in weddings/reunions and a 1% decrease in individual sports.

### Walk-in Lodging

GRS asked hotel properties to report the percentage of their overall occupancy that walks in the door without a prior reservation. Overall about 33% of visitors to SRV hotels are walk-ins. This also indicates that two-thirds of travelers to the area plan their lodging PRIOR to their trip.

### Top Ranked Leisure Feeder Markets

Overall, top feeder markets for leisure travel include (in rank order):

City of Origin	# of mentions
<b>Jacksonville</b>	10
<b>Atlanta</b>	9
<b>Tallahassee</b>	9
<b>Valdosta</b>	8
<b>Gainesville</b>	7
<b>Orlando</b>	6
<b>Tampa</b>	5
<b>Chicago</b>	3
<b>Columbia</b>	2
<b>Macon</b>	2
Miami	1
Cape Canaveral	1
Daytona Beach	1
Canada/Quebec	1
"FL cities"	1
Northern states"	1

**Lodging Visitor Profile**

GRS asked lodging properties to provide the typical traveler type as well as typical length of stay and percentage of guests that were adults traveling with children.

On average:

- 70% of hotel visitors and 47% of campground visitors are adults traveling WITHOUT children.
- Campground visitors tend to travel in a party of 3.33 and stay for an average of 10 days.
- 4% of hotel rooms are non-taxable (typically government travel).

**2015 Visitor Profile by Season**

	Spring	Summer	Fall	Winter
<b>Type of Visitors</b>	Leisure, families, festivals/events, golf, paddlers	Leisure, families, summer vacations, Disney travelers	Leisure, events, football, hunters/fishers, snowbirds	Snowbirds, leisure, holiday travelers, sports, families

**Top Ranked Priorities**

GRS asked lodging properties to rank the following customer segments in order of highest priority (1) to lowest priority (9) for future sales and marketing efforts by the Suwannee River Valley Marketing Group. Overall lodging properties preferred that the SRVMG prioritize Leisure Vacations (2.43), Nature/Outdoors Tourism (3.15) and Family Reunions (4.08).

Traveler Segments	Ranking (where 1 is highest/top priority)
<b>Leisure/Vacations</b>	2.43
<b>Nature/Outdoors Tourism</b>	3.15
<b>Family Reunions</b>	4.08
<b>Conferences/Meetings</b>	4.98
<b>Family Vacations (children)</b>	5.09
<b>Weddings</b>	5.14
<b>Team Sports Events</b>	6.56
<b>Fraternal/Social Groups</b>	6.77
<b>Religious Groups</b>	6.80

**Smith Travel Research Data**

GRS obtained lodging data from Smith Travel Research (STR) in the form of a five-year trend report for hotel/motel properties in the combined three counties of the Suwannee River Valley region (Columbia, Suwannee, Hamilton). The data reflects primarily chain-affiliated hotel/motels, all of which are located in the three-county region. It is important to note that STR continually updates their data, therefore, numbers can change on a month-to-month, and year-to-year basis. The most current numbers provided by Smith Travel Research are represented here. The STR data has a 61% monthly response rate for 2016 from the 2,090 rooms in the STR database. Therefore, this data can be considered very reliable.

Year	Occupancy	ADR	RevPAR	Supply	Demand	Revenues
2010	44.3%	\$63.31	\$28.04	848,188	375,663	\$54,826,335
2011	46.7%	\$68.43	\$31.95	830,435	387,749	\$57,752,107
2012	53.0%	\$69.42	\$36.81	802,969	425,802	\$50,933,006
2013	53.8%	\$70.96	\$38.16	802,635	431,586	\$55,335,079
2014	58.1%	\$73.95	\$42.99	799,415	464,799	\$53,848,303
2015	61.3%	\$77.89	\$47.77	767,960	470,989	\$51,342,305
2016 YTD (September)	61.6%	\$82.24	\$50.69	570,570	351,719	\$28,924,437

Source: Smith Travel Research - 2016 Trend

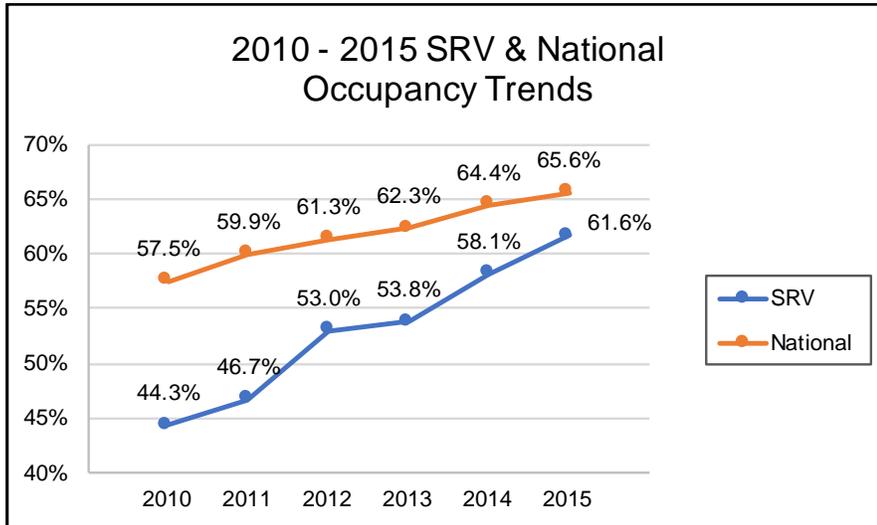
**Annual Occupancy**

Suwannee River Valley and Statista national annual occupancy percentages are listed below as a point of reference to the rest of the nation.

Year	SRV	National	Compared
2010	44.3%	57.5%	-13.2%
2011	46.7%	59.9%	-13.2%
2012	53.0%	61.3%	-8.3%
2013	53.8%	62.3%	-8.5%
2014	58.1%	64.4%	-6.3%
2015	61.6%	65.6%	-4.0%

Source: Statista - Hotel occupancy rate of the United States

Overall, over the past five years regional occupancy has underperformed national averages, but SRV shows steady growth and a narrowing of the gap. 2015 showed the highest occupancy in at least 5 years in the region.



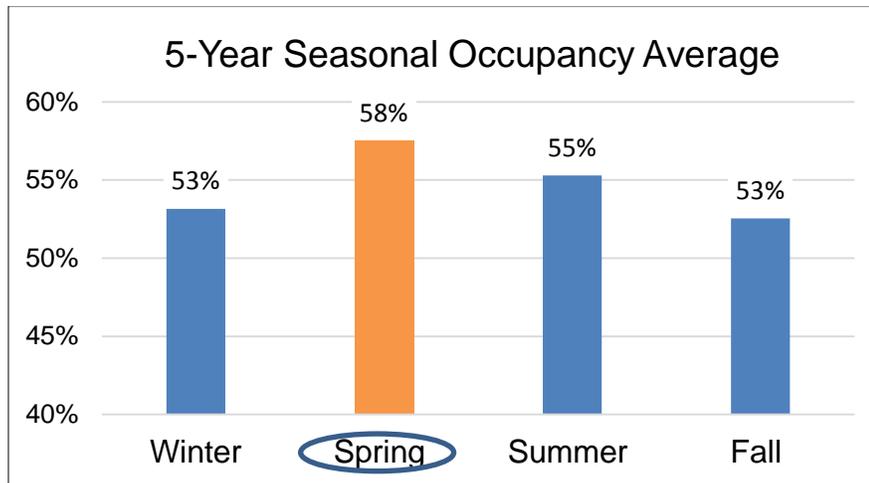
**Monthly and Seasonal Occupancy**

The table below shows the annual and monthly average occupancy rates for the SRV hotel/motel lodging market. The blue numbers indicate the lowest occupancy each year while the orange numbers indicate the highest.

	2011	2012	2013	2014	2015
January	44.4	46.8	53.5	53.9	58.5
February	44.5	47.4	53.4	54.1	58.8
March	44.6	48.2	53.7	54.1	59.2
April	44.7	49.0	53.5	54.2	59.7
May	45.1	49.6	53.5	54.8	59.7
June	45.4	49.8	53.7	55.1	59.8
July	45.5	50.8	53.3	55.7	60.0
August	45.5	51.7	53.3	56.3	60.1
September	45.8	52.0	53.4	56.8	60.5
October	46.1	52.4	53.5	57.3	60.9
November	46.5	52.6	53.9	57.5	61.1
December	46.7	53.0	53.8	58.1	61.3

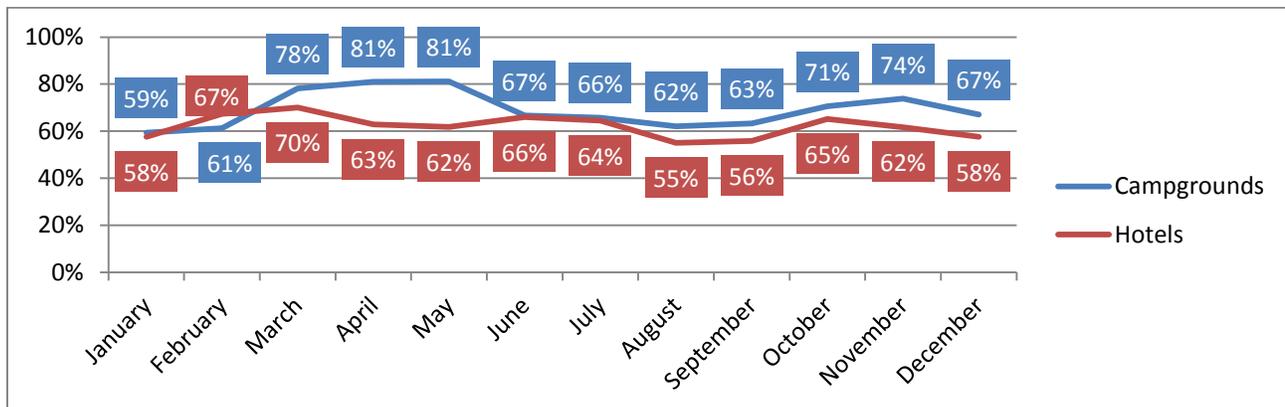
Source: Smith Travel Research - 2016 Trend

The five-year trend above consistently shows the highest occupancy month (December) is followed by the lowest month (January). However, when looking at the 5-year trend by season, Spring (March, April and May) is the strongest season.



**Campground Occupancy vs. Hotel Occupancy**

In addition to Hotel occupancy (as reported by STR), Gray Research Solutions also gathered occupancy data by month from area campgrounds. Campground occupancy is generally higher than hotel occupancy, except in January, February, June and July. Campgrounds performed considerably higher than hotels in the spring months (March, April and May).

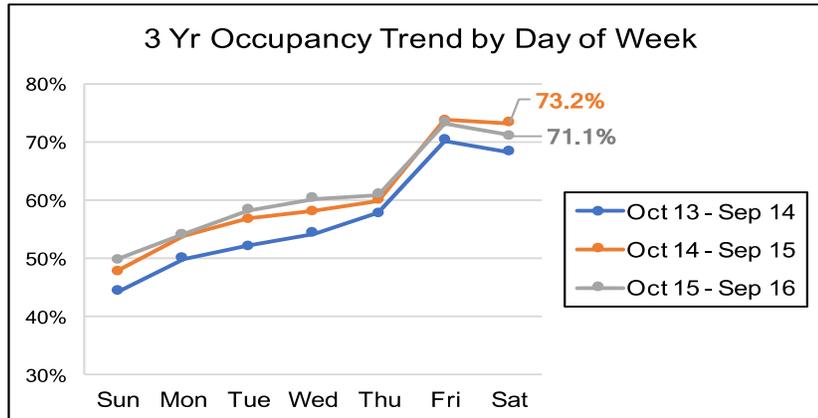


**Occupancy by Day of the Week**

Smith Travel Research (STR) records the average occupancy by day of the week from the Suwannee River Valley hotel properties that report to STR.

Three Year Occupancy (%)							
	Sun	Mon	Tue	Wed	Thu	Fri	Sat
Oct 13 - Sep 14	44.3	50.0	52.2	54.4	57.8	70.3	68.3
Oct 14 - Sep 15	47.9	54.0	56.9	58.2	59.9	73.7	73.2
Oct 15 - Sep 16	49.8	54.9	58.3	60.3	61.4	73.2	71.5

The chart below graphically illustrates that Friday and Saturday are consistently the strongest days of the week in the region. 2016 saw a slight increase in Sunday, Tuesday and Wednesday stays and a slight decrease in Saturday night stays. The SRVMG has an opportunity to benefit lodging and the local travel economy by selling the nights of the week with the lowest occupancy. This will require focused, strategic thinking by the SRVMG, as these are traditionally the most difficult nights of the week to fill.



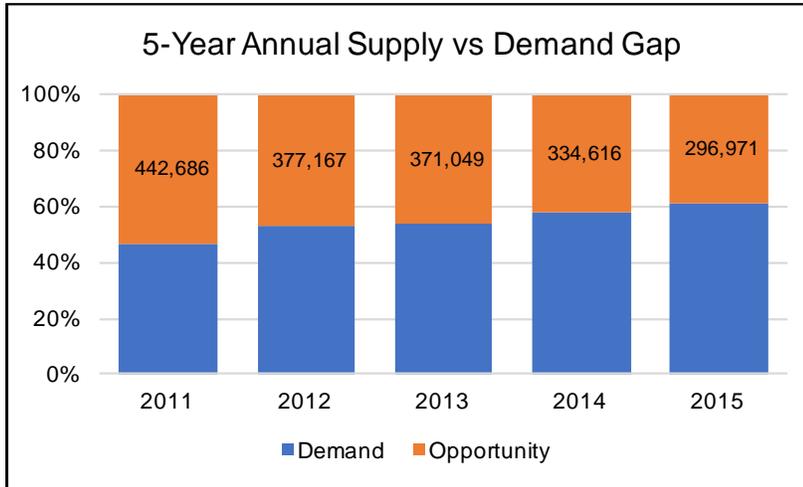
**Lodging Supply and Demand**

As previously shown, SRV performs below the national average on occupancy (reflected in rooms demand). However the gap between rooms available (Supply) and the rooms occupied (Demand) has decreased from 53% in 2011 of the total rooms available, down to 39% in 2015, indicating a favorable trend.

SRV Hotel/Motel Supply & Demand

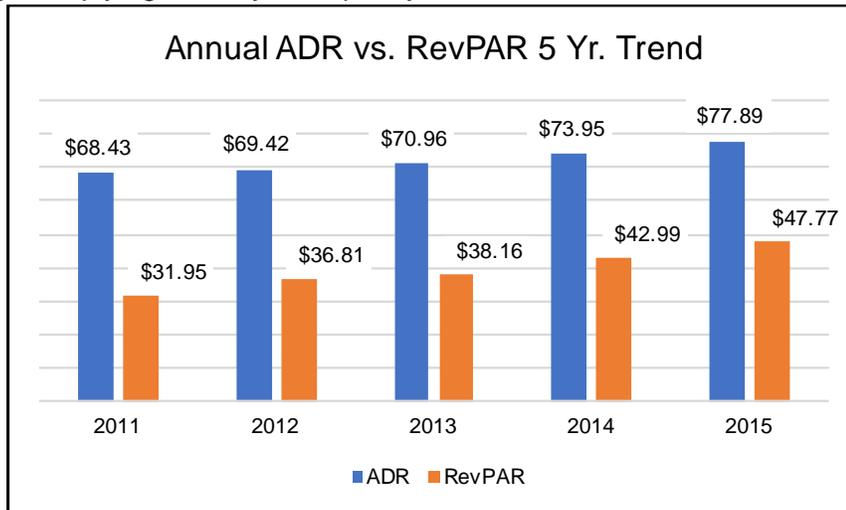
Year	Supply	Demand
2015	767,960	470,989
2014	799,415	464,799
2013	802,635	431,586
2012	802,969	425,802
2011	830,435	387,749

Source: Smith Travel Research - 2016 Trend



**Average Daily Rate (ADR) and RevPar**

In addition to the improving supply and demand numbers seen above, ADR (Average Daily Rate) for hotels/motels in SRV has had a steady increase since 2010. RevPar (Revenue Per Available Room) has increased as well. This means that hotels were able to increase rates while demand for rooms was also increasing, and is great news for the SRV region. The lodging industry tracks RevPAR as a key indicator of lodging success and profitability. RevPAR is calculated by multiplying ADR by Occupancy rates.



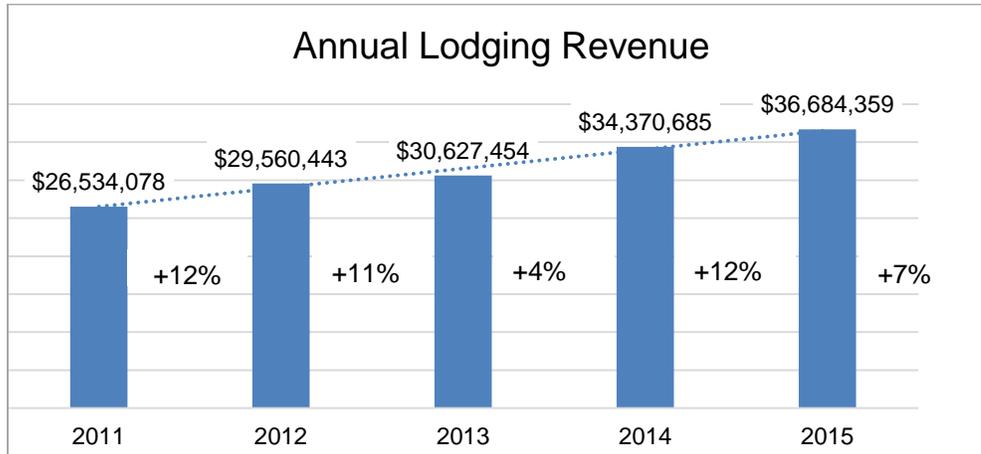
**Lodging Room Revenue**

Smith Travel Research reports the total annual lodging revenue for each year in the table below.

Year	Revenue
2011	\$26,534,078
2012	\$29,560,443
2013	\$30,627,454
2014	\$34,370,685
2015	\$36,684,359

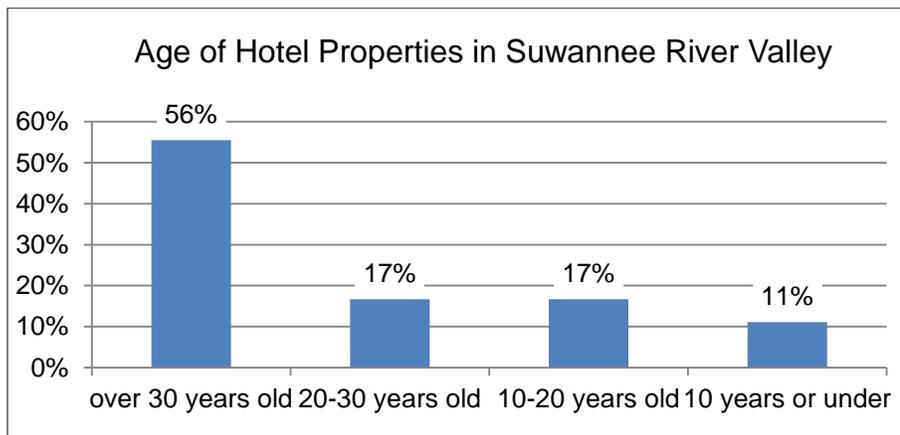
Source: Smith Travel Research - 2016 Trend

Revenue has increased by 38% in the last six years! The chart below graphically illustrates the positive pattern in lodging revenues, which show a steady increase. However, the year over year % increase isn't consistent. The year over year revenue increase in 2013 and 2015 were not as strong as in the other years.



**Age of Hotel Properties**

According to STR, over half of the SRV region's hotel properties are over 30 years old. This does have an impact on visitor impressions of an area. Properties will need to be updated to continue to attract area visitors (See full list of properties by county and age in Appendix A).



**Strategic Marketing Plan Based on Research**

**SWOT Analysis**

<p><b>Strengths</b>                  Springs, natural areas                  Camping opportunities                  Location at Florida's entrance</p>	<p><b>Weaknesses</b>                  Sense of regional place                  Signage/Wayfinding                  Lack of meeting space</p>
<p><b>Opportunities</b>                  Intercept more driving visitors from I-10 and I-75                  Travel writing and PR</p>	<p><b>Threats</b>                  Funding, participating partners                  Aging hotel properties                  Lack of awareness</p>

The Suwannee River Valley Region's strengths include beautiful springs and natural areas. Particularly surprising and unexpected are the beautiful "gemstone-toned" natural springs and the opportunities for outdoor recreation. The region's location at Florida's entrance and at the crossroads of major interstates I-10 and I-75 are also a major strength. Unlike other destinations that have to convince visitors to come their way, potential visitors to SRV are already there and just need to be convinced to pull off the interstate.

Weaknesses include a sense of place and wayfinding. Visitors might be right on top of beautiful spring areas and not know. In addition a lack of meeting space is a weakness. Meetings are a great way to boost weekday traffic, which is sorely needed in SRV.

Opportunities include intercepting more drive visitors from interstates (billboards are a big opportunity here, ideally featuring a beautiful photograph of an area gemstone colored spring for shock value). Also, the area's natural resources and assets lend themselves perfectly to travel writing and public relations. GRS recommends hiring a PR company to manage content and attract travel writers to the area.

Threats to the SRVMG include funding challenges. As previously mentioned, there is a very large difference between a \$36,000 marketing budget and a \$100,000 marketing budget. GRS strongly recommends that all three counties come together in 2018 to again secure the grant in order to create and maintain momentum for the next 5 (five) years. Other threats include aging hotel properties. As mentioned, over 50% of the hotel properties in SRV are over 30 years old which does impact visitor perceptions of an area. SRV needs to establish goals for attaining a **preferred mix of lodging** and create a partnership between the SRVMG, economic development, and Hamilton, Suwannee and Columbia county leaders to continuously monitor exiting lodging, and recruit new, non-economy properties. Finally, a general lack of awareness of the area and its offerings are likely limiting leisure visitors and groups from taking advantage. Thus, many of our recommendations center around raising awareness of the area.

**Marketing Plan Summary**

The following is a summary table of recommended strategies and tactics for marketing the SRV region in the next 5 (five) years. Recommendations are listed as priorities if the SRVMG has a small budget (\$) and if it has a large budget (\$\$\$). Currently (2017) the region has seen its budget reduced from \$100,000 to \$36,000 (funded only by the Columbia County TDC). Much more is possible with the previous budget of \$100,000, but that requires the three counties in the region to all participate in the Marketing Group in order to secure the EDO grant. GRS highly recommends this course of action; in fact our #1 strategy is to work together to ensure the Group is well funded.

		\$ - Lower Cost, Short Term Priorities	\$\$\$ - Higher Cost, Long Term Priorities
<b>Strategy 1</b>	<b>Market as a region</b>	<ul style="list-style-type: none"> <li>All 3 counties should participate in funding to secure the EDO grant for 2018 and beyond</li> <li>Inventory attractions, list on brochures, maps and website</li> <li>Track key regional metrics</li> </ul>	<ul style="list-style-type: none"> <li>Create responsive regional website</li> <li>Potentially expand region to include neighboring counties</li> </ul>
<b>Strategy 2</b>	<b>Prioritize Interstate Traffic</b>	<ul style="list-style-type: none"> <li>Showcase area at I-75 Welcome Center</li> <li>Design one brochure featuring gem toned springs, print liberally</li> <li>Design and print regional tear-off maps, leave at hotels and welcome center</li> </ul>	<ul style="list-style-type: none"> <li>Billboards (using gem-tone spring photo)</li> </ul>
<b>Strategy 3</b>	<b>Raise awareness of regional offerings</b>	<ul style="list-style-type: none"> <li>Collect/commission "gem-tone" photos of springs, use liberally</li> <li>Attract travel writers</li> </ul>	<ul style="list-style-type: none"> <li>Create comprehensive regional visitors guide</li> <li>Hire PR firm</li> </ul>
<b>Strategy 4</b>	<b>Attract more groups</b>	<ul style="list-style-type: none"> <li>Inventory facilities for family reunions/weddings</li> <li>Create "design your own reunion" page on website</li> </ul>	<ul style="list-style-type: none"> <li>Potentially hire inventory/sales person for groups</li> </ul>

## Strategy 01: Market as a Region

**Stronger Region with 3 Counties:** The Suwannee River Valley Region is stronger for having three counties together. While Suwannee County has the most lodging, the attractions, outdoor recreation, scenery, and other amenities in Hamilton and Columbia County make it a much richer product. This is literally a case of “The rising tide lifts all ships.”

Gray Research Solutions firmly believes that the combination of all the attractions in the three-county region is advantageous to all. While the majority of lodging, restaurants, and shopping is found in Lake City/Columbia County, the attractions and facilities that bring people to the area are scattered throughout the region. Thus, each participant in the regional marketing effort benefits from the assets of the others. Working together they are more likely to achieve growth than individually. This “economy of scale” definitely benefits the counties with smaller tourism marketing budgets. It might even be worthwhile to consider expanding and inviting other counties to participate in the regional tourism program.

One of the critical problems with the attractions in the region is that they are unknown to the approximately 108,000 cars traveling along I-75 daily (39.4 million annually) or the 21,000 vehicles traveling along I-10 daily (7.7 million annually). Thus, not having a regional marketing effort that reaches visitors along these exceptional corridors hurts the potential success of these assets. If a regional marketing effort could accomplish reaching this market, it would make a striking difference for these attractions.

**Regional Marketing Priorities:** Regional marketing initiatives should be considered in the following order, which are explained more fully in the following pages.

- Regional Map (printed on glued-edge pads for tear-off – placed at hotels, attractions, etc.)
- Regional Tourism Website
- Regional Visitor Guide (distributed at Welcome Centers, hotels, attractions, etc.)
- Billboards
- Special Showcase Area at I-75 Welcome Center
- PR – Travel Writer Recruitment
- Direct Sales (sports, meetings/events)

### **Marketing Ideas:**

- *Florida's String of Pearls: Visit the Gemstone-Colored Wonders of Florida*
- Affordable & Relaxing: Target “Baby Boomer Gypsies” by putting together a list of affordable/good potential longer-term lodging (maybe their own brochure/website) and a list of activities.

### **Lower Cost/Short Term Priority (\$):**

1. As mentioned previously, the participation of all three counties in the regional effort is critical. Not only does the larger region make more sense from the visitor perspective, but only by cooperating will the region be able to secure the EDO grant funding necessary to market effectively.
2. An inventory of regional attractions should be gathered for its use in brochures, maps, visitors guides, and the website.
  - Feature attracTORS, or the “must sees”, first.

- Include accurate hours of information, street addresses (rather than mailing addresses), and cost of admission.
- Be sure to include:
  - Places where **birders and nature lovers** can go, park the car, and be allowed to engage in naturalist activities.
  - **Golf courses** that are PLAYABLE to the traveling public
  - Suggestions for attractive **scenic driving routes**
  - **Geocaching courses**
  - **UNIQUE Shopping opportunities** (homemade, artisan-made, handmade, craft, farm-grown, etc.)
  - **LOCAL FLAVOR** non-chain eateries in the region. The listing can be a simple name with a “descriptor line” such as “local farm-to-market cooking” or “fresh made hamburgers, sandwiches, etc.”
  - **Camping sites** along with pertinent data on each. a grid format is preferred by the visitor as it helps them quickly ascertain what amenities they can find in each.

**3. Track key metrics and share with community and opinion leaders regularly to showcase success of tourism in the area and track marketing efforts.**

- Gather/document and maintain database of inquirers to the region (leisure visitors, wedding/reunion visitors, etc)
- Monthly occupancy tax collections
- Monthly Smith Travel Research (STR) report on region

**Higher Cost/Long Term Priority (\$\$\$):**

- With a larger budget, within the next five (5) years GRS recommends developing a responsive regional website.
- Because of the commonalities of many of the counties in the North Central Region of Florida (as defined by Visit FL), the SRVMG may consider expanding the current three county region to include neighboring counties.

## Strategy 02: Prioritize Interstate Traffic

The Suwannee River Valley encompasses two of the heaviest traveled Interstates in the region, is located on the Georgia/Florida state line, and benefits from a state welcome center. The I-75 and I-10 have a combined daily traffic count of nearly 130,000 vehicles, or nearly 50 million annually. Thus the region literally experiences a "River of Money" flowing through everyday due to this advantageous location and resulting facilities.

Florida's Suwannee River Valley is fortunate to be located at the Georgia/Florida state line, and thus be home to one of the State of Florida's Welcome Centers. The State Welcome Center on I-75 at the Georgia/Florida line is well maintained, fully stocked with great information, and has professional and eager staff to greet and serve the traveling public. The only downside to having this excellent facility is it requires the local destination to make an outstanding impression for itself in order to be noticed above all the state has to offer.

Currently at the Florida State Welcome Center, there is little emphasis on the region, other than in typical brochures found for each region. This needs to be remedied. One way of doing so would be to partner with the State Welcome Center to create a special section at the center showcasing information for the Suwannee River Valley.

### **Lower Cost/Short Term Priority (\$):**

- **Partner with State of Florida Welcome Center at I-75 to Create a Special Section** within the I-75 Welcome Center to focus on marketing the Suwannee River Valley. The area just inside the main door, on the left, would be perfect.
- **Design and Print Tear-Off, Glued Regional Tourism Maps**
  - Produce the regional map for the visitor guide and the website, then reproduce a 8" x 14" version of the map on glued-edge pads of 100 each. These "tear-off" maps can be distributed to hotels, restaurants, attractions, etc. and will likely become the **number one tourism marketing tool for the region**. As on the existing map in the visitor guide, attractions and major facilities would be marked with numbered icons. Across the bottom and the reverse side would be a listing of the attractions by number. Each listing would include the name, street address (for GPS) and a descriptor line.
- Design one regional brochure featuring photo(s) of gem-colored springs and print liberally.
- Make sure **Amtrak Stations** throughout the region have information on the Suwannee River Valley.

### **Higher Cost/Long Term Priority (\$\$\$):**

- **Billboards:** Billboards WORK in this region due to the significant traffic volume on the two major Interstates (I-75 and I-10) and should be a key part of any marketing strategy adopted by the Suwannee River Valley Marketing Group. Encourage placement of billboards along I-75 and I-10, perhaps helping develop co-op programs between lodging-dining-attractions-etc. Show photos of the gemstone-colored springs and list major attractions and Exit numbers.

## Strategy 03: Raise Awareness of Regional Offerings

### **Use Gem-Colored Springs as a Hook**

The gem-colored springs, connected by tea-colored rivers makes for a unique water adventure in this region that is highly compelling. Just getting into the gem-colored springs is simply a “must do” opportunity. And, again, these springs are all managed as part of state parks, ensuring they have the parking and restroom facilities, as well as the trails, stairs, etc. to ensure safety and comfort. What an amazing asset! Gray Research Solutions believes the uniqueness of these springs makes this the top visitor attraction for this region.

### **Lower Cost/Short Term Priority (\$):**

- Collect and/or commission high quality photos of gem-colored springs and use them liberally in marketing efforts.
- Continue to attract travel writers; conduct FAM tours and offer experiences of springs, tubing, etc.

### **Higher Cost/Long Term Priority (\$\$\$):**

- Create Comprehensive Regional Visitors Guide, utilizing photos and inventories of attractions.
  - **Format for Regional Visitor Guide:** A comprehensive regional visitor guide is critically needed. This is one of the top priorities for the regional group to maintain. This should be placed at I-75 Welcome Center, Amtrak stations, and at all regional hotels/lodging and attractions. Ideally this would correspond with a mobile app.
  - **Recommendations for Regional Visitor Guide:**
    - **Front Panel:** Recommended Headline:  
Florida's Suwannee River Valley  
Lake City Live Oak Jasper  
I-75 and I-10 corridor  
[www.SUWANNEEVALLEY.org](http://www.SUWANNEEVALLEY.org)

Include compelling photo showcasing the gemstone-colored springs

- **Inside Fold:** Top 10 Things to See and Do (plus compelling photos)
- **Table of Contents**
- **Local Dining**
- **Local & Unique Shopping**
- **Things to See and Do, Outdoor Recreation, Historic Sites** (state parks, attractions, museums, historic sites)
- **Weddings, Family Reunions, Events**
- **Sports & Tournament Facilities**
- **Calendar of Events**
- **Area Map**

Overall, we recommend less narrative and more listings & “descriptor lines.” The grid format for lodging, camping/RV is excellent and exactly what visitors prefer as it allows them to easily scan and find the type of lodging they seek. Gray Research Solutions thinks the size of the existing piece can be reduced with effective use of listings and

“descriptor lines” rather than the existing more extensive copywriting. Let the name-descriptor lines-photos do the work.

- Hire a PR firm to boost travel writing and articles on special experiences in the region.

## Strategy 04: Attract More Groups

The Suwannee River Valley is perfect for family reunions and weddings. Abundant lodging, outdoors, entertainment, shopping, dining, are all available. It is easy to get to the region, and around the region. While there are no typical "Convention Centers" within the region (and building one is not currently recommended), there are a variety of small and medium scale meeting venues including university campuses, fairgrounds, country clubs, etc. Event facilities including high-end properties such as Bienville Plantation and more modestly priced options such as the state and community parks, as well as the unique Spirit of the Suwannee Music Park, make small family gatherings an ideal target audience.

Gray Research Solutions recommends developing a listing of these facilities and having that listing on the regional tourism website. That gives those selling facilities, as well as the regional tourism marketing group, a useable tool that provides consistent data for each site. Target within Florida-Georgia-Alabama first. Make sure regional website makes it easy to put together your own family reunion. Use PR to induce growth.

### **Lower Cost/Short Term Priority (\$):**

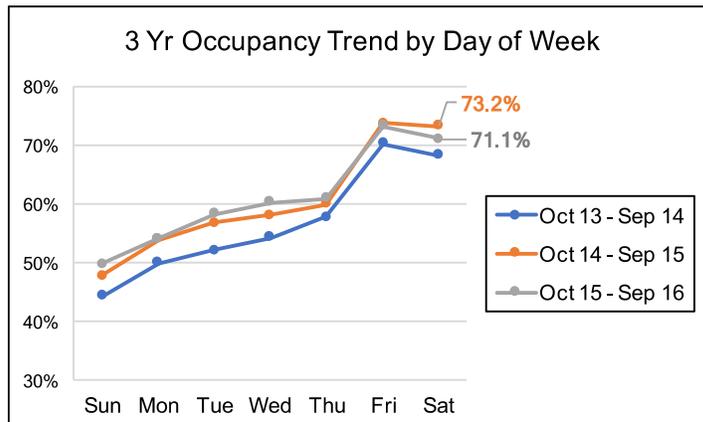
- An inventory of facilities and rentable space for reunions and weddings should be gathered for its use in brochures, maps, visitors guides, and the website.
- Create "Design your own reunion" page on website

### **Higher Cost/Long Term Priority (\$\$\$):**

- Within the next five years and with a larger budget, consider hiring a staff person to maintain inventories, sell groups, and help plan group gatherings such as family reunions and weddings.

## Other Recommendations

- Boost Weekday Visitation:** According to the Smith Travel Research STR Report for the region, weekend day business is typically over 70%, while weekday business is considerably lower. Strategies for growing **weekday** business are the greatest priority.



- When targeting sports groups, prioritize weekday events (over weekend events)
  - Consider developing facilities to build weekday lodging:
    - Sports
    - Convention/Meetings
    - Corporate training
    - Police/Public safety training
    - Animal shows/events
- Annual State Park Visitation Report: Partner with regional State Parks and Develop an Annual Report of Visitation at the Parks in the region from standard State Park data:** The State Parks in the region maintain annual reports of visitation. It would be good to partner with these parks and prepare an annual report that documents the totals for each park in order to provide clarity on growth in visitation.
- Sports Tourism:** There are existing facilities that already allow for recruitment of Sports visitors. The challenge may be in having sufficient paid staff that can focus on recruitment and servicing of these groups. First step would be to have a study conducted to look at what sports groups are coming now, and determine what the most lucrative unmet sports need is on a regional basis. Developing facilities and sales staff for good potential would be wise.
- Convention/Meeting Recruitment:** Unfortunately, there is little in the way of meeting/convention facilities. This could be a significant market with the number of rooms in this region (1,700). This would also definitely grow weekday visitation, which is a priority. Gray Research Solutions recommends developing first developing an inventory of existing facilities that can be utilized, and then determining what business is currently being “turned away” due to lack of sufficient facilities. This “lost business” should be analyzed to determine feasibility of developing additional facilities. If additional facilities are developed, bear in mind this effort would also require having

sales and service staff. Accurate accounting of lost business and perhaps interviews with potential customer groups can determine the feasibility of building any new facilities.

**Appendix A: Full list of Hotel Properties in Suwannee River Valley**

**Properties Reported by STR**

Name of Establishment	County	Open Date	Class	Room Count STR	% of TOTAL Room Inventory
<b><u>Unknown (135 rooms)</u></b>					<b>6%</b>
Driftwood Inn	Columbia		Economy Class	20	
Gateway Inn Lake City	Columbia		Economy Class	50	
Sunshine Inn	Suwannee		Economy Class	25	
Americas Best Value Inn White Springs Lake City	Hamilton		Economy Class	40	
<b><u>Over 30 years old (926 rooms)</u></b>					<b>44%</b>
The Village Lodge	Suwannee	Jun 1904	Economy Class	25	
Suwannee River Motel	Hamilton	Jun 1950	Economy Class	17	
Ramada Limited Lake City	Columbia	Jun 1964	Midscale Class	64	
Econo Lodge North Lake City	Columbia	Jun 1965	Economy Class	61	
Piney Woods Lodge	Columbia	Jun 1968	Economy Class	28	
Super 8 Lake City	Columbia	Jun 1968	Economy Class	94	
Jasmine Garden Inn	Columbia	Jun 1969	Economy Class	29	
Motel 8	Columbia	Feb 1970	Economy Class	25	
Budget Inn	Columbia	Jun 1970	Economy Class	50	
Days Inn Lake City I 75	Columbia	Oct 1973	Economy Class	117	
Baymont Inn & Suites Lake City	Columbia	Jun 1978	Midscale Class	82	
Cypress Inn	Columbia	Jun 1979	Economy Class	48	
Travel Inn	Columbia	Jun 1983	Economy Class	33	
Rodeway Inn Lake City	Columbia	Jun 1983	Economy Class	44	
Executive Suites	Columbia	Jun 1983	Midscale Class	68	
Americas Best Value Inn Lake City	Columbia	Jun 1983	Economy Class	89	
Econo Lodge Live Oak	Suwannee	May 1987	Economy Class	52	
<b><u>10-30 years old (760 rooms)</u></b>					<b>36%</b>
Seven Oaks Inn	Hamilton	Sep 1988	Economy Class	55	
Jennings Inn	Hamilton	Jun 1990	Economy Class	16	
Lake City Inn	Columbia	Sep 1990	Economy Class	50	
Travelodge Lake City	Columbia	Dec 1990	Economy Class	52	
Quality Inn Live Oak	Suwannee	Feb 1992	Midscale Class	63	
Days Inn Lake City I 10	Columbia	Jan 1998	Economy Class	62	
Best Inn Lake City	Columbia	Apr 1998	Economy Class	62	
Quality Inn Lake City	Columbia	Oct 1999	Midscale Class	55	
Country Inn & Suites Lake City	Columbia	Jan 2001	Upper Midscale Class	60	
Holiday Inn Express & Suites Live Oak	Suwannee	Jul 2001	Upper Midscale Class	69	
Holiday Inn & Suites Lake City	Columbia	Aug 2004	Upper Midscale Class	127	
Hampton Inn Suites Lake City	Columbia	Apr 2006	Upper Midscale	89	

Florida's Suwannee River Valley

				Class	
<b>Under 10 years old (269 rooms)</b>					<b>13%</b>
<b>Fairfield Inn &amp; Suites Lake City</b>	Columbia	May 2008	Upper Midscale Class	89	
<b>Comfort Suites Lake City</b>	Columbia	Jan 2009	Upper Midscale Class	94	
<b>Home2 Suites Lake City</b>	Columbia	Jan 2016	Upper Midscale Class	86	
<b>36 Properties</b>	<b>TOTAL</b>			<b>2090</b>	

Source: 2016 STR Five-Year Trend Report- Suwannee River Valley, FL

Name of Establishment – Listed as CLOSED on STR	County	STR Class
<b>Quality Inn Lake City</b>	Columbia	Midscale Class
<b>Howard Johnson Jennings</b>	Hamilton	Economy Class
<b>Scottish Inn Jasper</b>	Hamilton	Economy Class
<b>Independent White Springs Inn</b>	Hamilton	Economy Class
<b>Scottish Inn Lake City</b>	Columbia	Economy Class
<b>Budget Inn</b>	Columbia	Economy Class
<b>Road Master</b>	Hamilton	Economy Class
<b>Colonial House Inn</b>	Hamilton	Economy Class
<b>Red Carpet Inn Lake City</b>	Columbia	Economy Class
<b>Red Roof Inn Lake City</b>	Columbia	Economy Class
<b>Cabot Lodge Lake City</b>	Columbia	Midscale Class
<b>Independent A 1 Inn</b>	Columbia	Economy Class
<b>American Inn</b>	Columbia	Economy Class
<b>Independent Royal Inn</b>	Suwannee	Economy Class

In addition, the SRVMG listed seven (7) properties that were not listed in the STR report.

Name of Establishment	City & State	County	Rooms
<b>American Inns</b>	Jasper, FL	Hamilton	32
<b>Budget Inn</b>	Jasper, FL	Hamilton	50
<b>Quail Heights Lodge</b>	Lake City, FL	Columbia	15
<b>Royal Inn</b>	Live Oak, FL	Suwannee	25
<b>Smoakhouse Ranch Bed and Breakfast</b>	Branford, FL	Suwannee	4
<b>Steamboat Dive Inn</b>	Branford, FL	Suwannee	16
<b>White Springs Bed &amp; Breakfast</b>	White Springs, FL	Hamilton	6



**Columbia County Sports Commission**

**Sports Tourism/Marketing  
Strategic Planning Project**

**Final Report Submitted: April 7, 2017**

April 7, 2017

Paula Vann  
Executive Director  
Columbia County Tourist Development Council  
P.O. Box 1847  
Lake City, Florida 32056

Dear Paula,

Thank you for your efforts on our recent work in Columbia County. Your team has been quite helpful and very responsive throughout this process. The groundwork we have set with your stakeholders will serve as a tremendous foundation for future sports tourism, event, and venue development efforts in the region.

Enclosed is the report detailing our findings. The report includes a SWOT analysis of the sports tourism efforts of the Columbia County Tourist Development Council/Sports Commission, as well as recommendations for future sports tourism development. Both the SWOT analysis and the recommendations are built on a “Powers of Three” format (three main points, and in most cases, no more than three action items for each).

Please let me know if you have questions about the enclosed recommendations leading up to our community meetings in May. We are looking forward to our follow-up discussions and final presentations.

Thank you again for all your support throughout this process!

Yours in Sport,

A handwritten signature in blue ink, appearing to read 'Jon Schmieder', with a stylized flourish at the end.

Jon Schmieder  
Founder + CEO  
Huddle Up Group, LLC

**Columbia County Sports Commission  
Sports Tourism/Marketing – Strategic Planning Project  
SWOT Analysis**

It is the opinion of the Huddle Up Group (“Consultant”) that there is an opportunity to continue to expand the sports tourism work of the Columbia County Sports Commission (“CCSC”). Through our extensive phone interviews, conversations with several events rights holders, and our knowledge of Columbia County and national marketplace, we believe there is room for the CCSC to deliver additional overnight stays to the destination through sports. An expanded sports tourism effort would lead to increased economic development, and will positively impact the community over time. In a market the size of Columbia County, with its numerous positive attributes and the current absence of a convention center, it is critical that grass roots sports tourism and events continue to be a top priority. Below is a SWOT analysis constructed by the Huddle Up Group. Each SWOT item features three key issues with no more than three action items for each (“Powers of Three”).

Strengths

1. Community Leadership – It was clear to the Consultant Team that Columbia County’s sports and tourism leaders work well together. Every person we encountered had a community-first mindset, which makes positive change in sports tourism (and other areas) viable for the future. The community leaders we interviewed were unanimously supportive of an expanded sports tourism program. In addition, there are also sports industry leaders in the area that are connected regionally and nationally (example: USSSA leadership) as well as a solid foundation of local promoters that can build locally owned events (examples: Florida Gateway Community College, Half Mile Timing, Suwannee Bicycle Association). The key for the CCSC will be to find ways to continue to partner with, and enhance the existing efforts of, these sports event leaders.
2. Destination Offering – Columbia County offers rights holders an inviting community that is event friendly to conduct regional and national championships. Lake City’s location near Interstates 10 and 75 offers convenience to the drive market, and its proximity among several larger cities (examples: Jacksonville, Orlando, Gainesville, Tallahassee) allow for teams throughout Florida to easily travel to Columbia County. The weather in the region is a positive attribute for tournament organizers as are the number of quality venues (baseball/softball) that are clustered in one location.
3. Facilities I – The Consultant Team found the venues in the area that are used to host grass roots participant driven tournaments to be quite a bit better than anticipated. There are more quality baseball and softball fields (25) at one venue (Southside Sports Complex) than in most markets two to three-times Columbia County’s size. The Southside Sports Complex offers up a multitude of fields to host both local community play and competitive tournaments at the same time. The Fort White Sporting Complex is a solid

overflow venue for the larger baseball and softball tournaments and could serve as the host site for smaller events. Alligator Lake offers several courses ideal for varying lengths of cross country races.

### Weaknesses

1. Facilities II – While the Southside venue has the ability to be a differentiator for the Lake City area, there are some issues regarding this facility and additional venues in the region as it relates to their use for regional and national tournaments. These issues include, but are not limited to, the following:
  - a. Lack of Indoor Facilities – Columbia County lacks a significant indoor space to use in attracting sports tournaments. This can be overcome with the enhancement/expansion of the existing outdoor facilities, so long as those improvements are made with a vision to grow tourism during shoulder and off-peak seasons (November to March).
  - b. Limited Multi-Use Fields – Lake City and the surrounding area have a very limited inventory of flat multi-use fields. In addition, the fields that do exist are largely controlled by the local soccer association and are difficult to book for non-soccer activities such as lacrosse, ultimate, field hockey, tackle and flag football, etc.
  - c. Infrastructure – Several of the existing venues in the region need upgrades. Some fields at the Southside facility are in need of permanent lighting. The Fort White Sporting Complex is soon to get permanent bathrooms, but could also use some additional parking lot work, enhanced spectator seating, as well as lighting on some fields not currently illuminated. The multi-sport fields at Southside are limited in number, and lack much of the basic infrastructure needed to host larger regional and nationally sanctioned tournaments.
  - d. Accessibility – The current management model for some of the venues in Columbia County can be a hindrance to hosting outside tournaments and events. Specifically, the user contracts with some of the community groups could be interpreted to give the club final say in the scheduling of the venue. While the Consultant Team believes the County has the final say under the current agreements, precedent has been set that the managing clubs hold that power. These clubs are often so busy with their own local programming, that they deem the venues inaccessible for the CCSC to use in hosting championships. A strategic discussion with each of the venue owners and managers in the region should be had to find spots in the calendar where both the host venues and the hospitality community could benefit.

- e. Calendars – Currently the CCSC does not have the same level of access to all area venue calendars. The CCSC staff is tasked with booking events that drive increased tourism revenues in off-peak and shoulder seasons. In order to achieve maximum impact, the CCSC sales staff needs to be able to consistently review where the community’s venues have open dates and then attempt to book new events in those open windows. Some form of a regularly shared venue calendar/process would be advantageous for the CCSC sports staff going forward.
2. Staffing – The CCSC/TDA staff position dedicated to sports tourism sales and marketing is currently vacant. In the challenging sports tourism marketplace, and with numerous sports commissions in Florida (27) competing for this business, it is imperative the CCSC to fill this staffing gap in the near future.
3. Hotels – The existing hotel inventory can present issues on two fronts: (1) of the 1,600 available rooms, approximately 800 are rooms that are suitable for visiting tournament teams, and (2) in situations where the County is hosting multiple events at the same time a significant compression can occur, driving rates far above the level that traveling teams are used to paying. Additional hotels that are coming on line will help with these issues, particularly those that are of a select or full-service quality.

### Opportunities

1. Community Engagement – Through an enhanced sports tourism program, the CCSC will have a tremendous opportunity to continue to grow its connection to the community. Specifically, the CCSC can use this revamped sports tourism initiative to galvanize area leaders in the following ways:
  - a. Education – Sports tourism has had a positive impact on the Columbia County marketplace for many years. The Consultant believes there is a great need for both internal and external education on the historical value of sports tourism to the area. In the mind of the Consultant, the CCSC staff, hospitality community, and community leaders could all use a primer on the overall impact sports related business brings to the area, and how an expanded sports marketing effort will benefit Columbia County in the future.
  - b. Stakeholder Engagement – Many high-level decision makers in the region are engaged in the community and are knowledgeable of the CCSC’s work, yet they can’t quite articulate the historical and annual impact of the CCSC’s efforts. By leading a collective conversation around sports tourism that will focus community leaders on the building blocks for success (examples: national sports marketing, event creation, and venue development/enhancement), the CCSC will be able to better engage the corporate community and elected officials in the region.

- c. Expanded Partnerships – From information gathered through the research process, the Consultant believes there is significant support to expanding the sports tourism effort in Columbia County. This includes an increased engagement of the County Commissioners, the Lake City Mayor’s Office, City of Lake City, Chamber of Commerce, Florida Gateway College, and the hospitality community at large. Increased collaboration focused on venue enrichment/development with these stakeholders will lead to positive results in economic development through the hosting of more sports tournaments and special events.
  2. Events – Additional strides can be made in the area of locally driven events, including activation on the following opportunities:
    - a. Diversification – Baseball and softball accounts for the vast majority of overnight stays relating to the sports market. The enhancement of the area’s venue inventory (in the form of new multi-purpose fields as an example), along with the re-launch of intercollegiate athletics at Florida Gateway College, offer the CCSC an opportunity to create and grow locally developed events (see below). These events could diversify the dependence on the bat and ball sports to drive a majority of overnight stays in Columbia County.
    - b. Addition of Special Events – Currently, the CCSC does not have a staff member responsible for special events such as concerts and festivals. As sports marketing and event management is similar to that of a concert or festival, several DMOs have merged the sports market with the “events” market. The Consultant suggests that the CCSC explore the inclusion of special events under the sports umbrella.
    - c. Created/Owned Events – Discussions with several local stakeholders uncovered opportunities to partner on locally created events that would in turn, deliver upon the mission of the CCSC. Currently, a vast majority of Columbia County’s sports tourism is delivered through softball and baseball tournaments. There are opportunities to work with more of the area’s sports clubs (examples: soccer, lacrosse, and football). Created (or locally “incubated”) events are becoming more and more popular among DMOs and sports commissions as a way to build a long-term presence that fill the calendar needs of the local hospitality industry, and drive business to the area year over year. Created events allow the managing entity (such as a local promoter in partnership with a CVB) to control not only where they fall on the calendar to maximize their impact, but also to take advantage of the profits from successful events.
  3. Increased Collaboration – There are several groups across Columbia County that are looking to enhance their community and sports venue offering. Marrying the efforts of the CCSC with Columbia County Parks & Recreation and Florida Gateway College

would provide the County a big-picture road map, that is inclusive of all stakeholders in the region. In a community with the population size of Columbia County, and with the existing venue and human capital in place, a county-wide venue and programs master plan would benefit the entire region in a profound way.

### Threats

1. **Regional Competition** – There are several competitors in the area that are well established in the regional and national sports tourism space (see Appendix D). The high level of competition from Jacksonville, Gainesville, Tallahassee, and the Greater Orlando area, make it more difficult each day for the CCSC to remain relevant. While Columbia County may not want to be like these communities, their presence in the sports tourism space will require the CCSC to pick its proverbial spots and be smart about what its focus areas become. In addition, there is an expanding national trend of small and mid-market DMOs increasing their bed tax percentage and/or using other tourism-related funds (such as food & beverage taxes) to build sports venues (see Appendix B). As this bed tax activation trend is in its infant stages, the Consultant believes that no conclusions on the trend’s success or failure can be accurately drawn at this time. However, the use of tourism generated funding sources for venue enrichment and development is a strategy that should be considered by Columbia County in the future.
2. **Hotel/Restaurant Inventory** – Several respondents stated that the lack of “usable” hotel rooms and restaurant options could be detrimental to the long-term viability of sports tourism in the area. While there were some differing opinions on this topic, there were far more concerns raised than dissenting opinions.
3. **Human Capital** – The sports manager/director position at the CCSC has been vacant for some time. In order to effectively compete in the sports market, a dedicated and experienced sports tourism professional needs to be working on behalf of Columbia County. The Consultant Team believes this position should be filled as soon as possible.

### **SWOT Executive Summary**

In the opinion of the Consultant Team, Columbia County has done a good job historically of driving overnight stays to the area. This is largely in spite of a limited tournament-friendly venue inventory beyond that of Southside. There is an opportunity to continue to build upon its sports tourism success by expanding the CCSC’s effort to include more constituents across the community. Through this community-wide effort, Columbia County will realize increased economic activity for the region through additional overnight stays via sports tournaments and related events. Throughout the research for this project, it was evident to the Consultant Team that community leaders are largely supportive of an expanded sports tourism effort, and would use their time and political capital to support such an initiative.

In the eyes of the Consultant, the risk in continuing down the current path would be akin to marketing a truly unique destination like that of the “Joneses.” In the sports tourism and events marketplace, many cities have had success through a basic sales and marketing plan and an undifferentiating venue mix. For a community to “keep up with the Joneses” in this space, one would normally attend 1-2 major sports tourism conferences, hand out informational brochures, make a few follow-up phone calls, and field every RFP that hits their inbox. This reactive type of game plan is the most widely accepted way to play in this space. It is also often times the most ineffective and misguided use of the limited resources a community has available to them. A more strategic, resource efficient approach is required to have long-term success in the hyper-competitive sports tourism industry. That includes an evaluation on whether resources should be spent on human capital (staff), marketing (sales), or even venue enhancement and development. There are more options that need to be considered today, than in the “old-school” sports tourism model of the past.

In the opinion of the Consultant Team, an improved venue mix and the hiring of an experienced sports director, would enable the CCSC to have the assets to sell itself against its competitive set, and to continue its positive impact on the local community. Given the proper resources, the CCSC and its sports department could provide a significant impact to the local economy year over year, and could also enrich the lives of local community user groups as well. By sharpening its overall outreach effort, and strategically filling venue gaps, the CCSC and its partners will enhance community ROI in the sports tourism market, which will drive significant economic development to the region.

By strategically engaging the community’s leaders, the Columbia County TDC will build a strong environment for hosting regional and national tournaments, as well as concerts and special event-type programs. It is critical that the CCSC not only deliver on the recommendations set forth here, but also to create opportunities to draw the community together (examples: enable local promoters to grow their events and to create new ones, educate area civic groups and leaders on the value of sports tourism in Columbia County, offer the hospitality community meaningful engagement opportunities in this effort). The perception must be that the Columbia County TDC and Sports Commission is leading a sports tourism and marketing effort that is inclusive of all stakeholders in the region, and is enriching all of Columbia County in a meaningful way.

**Columbia County Sports Commission  
Sports Tourism/Marketing – Strategic Planning Project  
Synopsis and Recommendations**

The sports tourism industry has grown consistently over the past twenty years. Studies show that the grass roots portion of this market is worth more than \$9 billion annually to the domestic economy. Whether you use the National Recreation and Parks Association spending estimate (\$85 per person per day), the 2011 National Association of Sports Commissions (NASC) study (\$208 per person per day), or the Destination Marketing Association International (DMAI) economic impact calculator, the value of this niche market is palpable for many small and mid-sized markets.

Add to this industry growth, the increase in popularity of soccer\*, lacrosse, and additional emerging sports (examples: Bicycle Moto Cross or BMX, pickleball, quidditch, rugby, and ultimate), the opportunity for the continuing expansion of economic development through sports tourism is tangible.

Throughout the research process, it became apparent to the Consultant that there is an opportunity for Columbia County to enhance its presence in the sports tourism and events space. The key moving forward is for community stakeholders to work together in building and managing an expanded sports tourism and marketing program, and to focus political capital on enhancing the venue inventory in the region. This unified effort will drive economic development to the Columbia County region on a recurring basis from one year to the next. Through the execution of a strategic and targeted game plan, Columbia County will enhance its position regionally as a player in the sports tourism and events industry.

\* - ESPN's 2014 Luker Poll showed Major League Soccer (MLS) to be on par with Major League Baseball (MLB) on at least one affinity demographic. Survey respondents aged 12-24 ranked soccer as their second favorite sport, trailing only the National Football League (note: the survey did distinguish between college and professional football, with college football ranking behind soccer in this age group). In addition, while total attendance of MLS games is much lower due to the number of contests, the average attendance for MLS games in 2013 eclipsed that of Major League Baseball (MLB) and National Hockey League (NHL) games.

Methodology

The Huddle Up Group, LLC (“Consultant”) conducted an audit on the current sports tourism work of the Columbia County Sports Commission (“CCSC”). The audit included in-person meetings with multiple community groups and phone interviews with 17 key stakeholders, including the CCSC staff, community leaders, venue managers, athletic administrators, event owners, and additional targets that were identified by the CCSC. The Consultants reviewed several historical documents including marketing budgets, a sports venue guide, and the tax

returns of the Columbia TDC. The Consultant Team also visited six (6) existing venues, as well as two (2) sites proposed for a new multi-sport field complex as well as a potential tennis facility.

The audit was led by Huddle Up Group Founder + CEO, Jon Schmieder, and Huddle Up Group Principal, Gary Alexander. The audit focused on three themes: (1) national best practices for sports tourism and events within a similar organizational structure, (2) identification of new business models/opportunities that would enhance Columbia County's sports tourism results, and (3) estimated financial implications for each recommendation. Discussions were held around national best practices in the three theme areas and focus was given to applications for the CCSC. The intent of this process was to create community support for the CCSC's increased sports tourism and venue enrichment effort by giving local stakeholders a voice, to foster a teamwork mentality for Columbia County, and for the TDC/CCSC to serve as the leader of this united effort.

The Consultant took the results from the phone and in-person interviews, as well as the initial site visit in Columbia County, then overlaid national best practices to develop and deliver the enclosed recommendations. These recommendations are intended to spark a dialog within the Columbia County leadership hierarchy in order to build a framework for next steps on an expanded sports tourism and marketing program. The enclosed game plan includes recommendations for three (3) primary focus areas and two (2) secondary concepts for future consideration. The primary areas can happen in the short-term, regardless of new resource acquisition. In addition, within the primary focus areas, each recommendation has an estimated annual cost associated with that action. The secondary recommendations are every bit as critical as the primary ones, however will likely take more time and strategic planning to bring to fruition. Costs for activation are noted at the end of each recommendation.

#### Primary Recommendation Areas

1. Organizational Structure
2. Messaging and Marketing Platforms
3. Event Solicitation Concepts

#### Secondary Recommendation Areas

1. Venue Development/Enrichment/Usage
2. Funding Model

### **Primary Recommendations**

#### Primary Recommendation #1: Organizational Structure

There is great opportunity for the CCSC to increase its regional and national presence in the sports tourism and events space. In order to expand in a meaningful way, the Consultant

recommends two (2) action items aimed to strengthen the foundation of the CCSC's sports tourism effort. These recommendations are noted below with their anticipated activation costs in parentheses:

1. Staffing – Currently there is no staffing support for the TDC's sports tourism program. It is imperative that the TDC hire an experienced sports tourism professional to take the role of sports director of the CCSC. Having an experienced leader with a sports tourism background is essential in that servicing meeting groups is vastly different than the requirements for supporting sporting events. Sports groups require several execution elements that a meeting normally would not, such as volunteer recruitment and support, media assistance, sponsorship facilitation, team and VIP transportation, reception planning and hosting, and venue scheduling/management. The best convention and visitors bureaus (CVBs) and sports commissions are able to effectively manage everything “outside the lines” so their clients can concentrate on the competition itself (“inside the lines”). Many destination marketing organizations (DMOs) simply place the responsibility for sports to a SMERF (Social, Military, Educational, Religious, Fraternal) sales person and believe that by doing so they are “in” the sports market. This is a band-aid approach that often leads to event rights holders crossing those markets off of their list as potential host destinations for their championships. A proven professional with the knowledge and experience within the sports tourism market is essential for any community to succeed, which is as true in Columbia County as it would be in any other destination. In addition, the Consultants recommend the title of the leading staff member for the sports department be a “Director” level, and that use of the word “sales” is avoided. The word “sales” conveys a “heads in beds” focus to sports event rights holders. Rights holders want to know that the communities they partner with on their events know how to support sporting events and will do everything they can on game day to deliver the best end product for their athletes, their families, and fans.

(Activation Cost for a Director of Sports: \$60,000 - \$75,000 plus benefits, depending on experience.)

2. Leverage Community Support – The Consultants believe the current sports advisory group, although loosely defined, could be a valuable asset long-term for the CCSC. In the future, the group should be expanded to include leaders who have a great passion for continuing the sports tradition in the community, including the hospitality industry, Florida Gateway College Athletics Department, parks and recreation leaders, and community user groups. To continue the positive momentum, it is imperative for the CCSC sports staff to give these community leaders meaningful roles including ownership of specific tasks and programs going forward (example: allow advisory members to lead the “6&6” program outlined below). This high-level of community engagement should also be a top marketing message used in selling the community to event rights holders.

(Activation Cost: Nominal).

## Primary Recommendation #2: Messaging and Marketing Platforms

Throughout the research process, the Consultants encountered instances where stakeholders (both internal and external) were unsure of the historical importance of sports tourism in Columbia County. While this is very common in markets the size of Columbia County, there is a significant amount of education that needs to take place in the future. The Consultant recommends four (4) action items to help improve the CCSC's sports market messaging to both internal and external stakeholders:

1. Local Communications – CCSC area stakeholders, the local media, and the hospitality community at large in Columbia County all need an increased education on the value sports tourism brings to the area. To deliver upon this message, the Consultant Team recommends the CCSC undertake the following actions:
  - a. Value Proposition – Create an education campaign to roll out both internally and externally. This monthly road show would be presented in a 60-minute coffee workshop format. The CCSC staff would partner with an outside stakeholder to present on the value of sports tourism to the region, and the work of the CCSC in the sports and events marketplace. The first of these meetings each year should be held with the TDC staff and board (internal) to ensure the TDC family is singing from the same “song sheet.” Additional presentations should be made to various community groups (examples: chamber leadership, civic clubs, high school athletic directors, hoteliers, restaurant association, etc.). It is important to reiterate that the CCSC staff utilize outside supporters (example: an advisory board member) as partners in these meetings in order to give the presentation community (or third party) validation.
  - b. Create Corporate/Hospitality “Forums” – Where the education campaign noted above is aimed at community groups, the CCSC should also develop a channel to educate and engage the corporate and hospitality community in Columbia County. The Consultants recommend the creation of a quarterly “6&6 Lunch”. These lunches employ six existing stakeholders (example: an advisory board member) to each invite one guest from the business community (six stakeholders, six guests, “6 & 6”) to attend an informative luncheon on the importance of sports tourism and the work of the CCSC in this area.
  - c. Measurements – In order to create and deliver the educational outreach programs outlined above, the CCSC must be able to message the success of its efforts. This would require the Commission to be able to accurately measure the economic impact of its activities (through past data captures, or via the NASC or DMAI impact models), and also be able to effectively capture room night totals from events it hosts (through live data captures, or the use of a standardized formula based on participant numbers). In addition, the CCSC should attempt to gather

some historical data on what the sports department has generated to date. This historical tracking should be updated from one year to the next and used in external communications where appropriate.

(Activation costs for items A & B: Nominal food and beverage costs if Value-In-Kind sponsors cannot be identified).

(Activation costs for item C: Nominal, as the CCSC already has access to the NASC and/or DMAI economic impact models).

2. Targeted (National) Outreach – The sports sales efforts of the CCSC have in the past included several industry conferences, and a select number of sales trips and FAMs in association with a state sports tourism alliance (Florida Sports Foundation). In the future, the Columbia County Sports Commission should conduct sales trips and familiarization tours (FAMs) on its own accord where financially viable, and include in each program local leaders and/or elected officials. The CCSC should budget for these added outreach events as well as the costs of travel for the leaders/electeds. The sports industry is all about relationships. Columbia County will be better served to develop these relationships in one-on-one environments, rather than via busy trade shows, jointly marketed sales trips, or FAMs.

(Activation Costs: \$5,000 per added outreach event, inclusive of costs for a community stakeholder, VIP, or elected official to attend. Two added outreach events would require \$10,000 in added budget support).

3. Strategic Partnerships – There is great opportunity for the CCSC to build bridges in the Columbia County community. More specifically, there is a need for the newly expanded sports tourism effort to bring area sports groups into the fold. Relationships can be enhanced with the various venue managers, Florida Gateway College leaders, and the various parks departments among others. There is opportunity to recognize the past work of these community leaders through an annual community awards event of some type. The end goal is for the Columbia County Sports Commission to be viewed as the "go to" organization when its partners need help to host an event.

(Activation Costs: \$2,500 - \$5,000 for an annual event or program to recognize the contributors to sports and events tourism in Columbia County).

4. Trumpet Successes – In all cases where the CCSC is involved in the production of an event, the organization should make it a priority to issue a press release on the community impact of the event. This release should be sent out via traditional and also new media outlets. The information should include economic impact data derived from the aforementioned NASC or DMAI tools. It is important that in this process that the Sports Commission steer clear of the perception of taking credit for the event in total, and

that the event rights holder be included in the promotion process throughout.

(Activation Costs: Nominal).

### Primary Recommendation #3: Event Solicitation Concepts

During the research and analysis for this project, several areas of opportunity presented themselves relating to the sales and servicing of events. Two (2) such concepts are outlined below:

1. **Venue Booking Policies** – The CCSC should strive to have “favored nation status” at all parks and recreation facilities, scholastic venues, as well as at private facilities. While this is easy to state on paper, it is often tougher to achieve due to differing priorities between the venue manager and the CCSC. In some cases, this is also difficult to achieve where there is “territorialism” between various community constituents. If the CCSC were able to assist financially with the enrichment or expansion of area venues (beyond the current \$300,000 annual contribution to parks and recreation), there would be opportunity to request this favored nation status in the future. In addition, a transparent (shared) calendar at all venues is critical for the Sports Commission to add value to venue managers over time. This calendar would include the parks facilities, privately run venues, high school and college facilities, and additional locations with sports friendly spaces. In addition, the current booking rights contractually afforded to some of the area’s sports clubs need to be revisited in their entirety. It is the opinion of the Consultant Team that control of the calendar in these contracts still rests with the parks department, however precedent has been set that gives scheduling control to the sports clubs themselves. In order to be effective in the sports tourism space, a well-balanced use (between community user groups and tournament play) of all venues is critical. With that in mind, the Consultants recommend these agreements be revisited as soon as possible, and in the case where the TDC is investing in venue improvements, they should have control of those venues 18-months and further out (similar to how a CVB would block out key dates in their convention facilities).

(Activation Costs: A significant venue improvement fund could be used to leverage the event calendars controlled by area venue leaders, see below).

2. **Empower Local Promoters** – Columbia County has a strong foundation of event promoters whose work supports the mission of the CCSC. These locally based event professionals offer the Commission a tremendous resource to build annual sports and event properties, and thusly increase economic development. By offering support to these locally incubated programs (beyond the current \$15,000 event grant funds currently in place), the CCSC can build a solid annual cache of events that will allow it to then pick and choose where to participate in competitive bids for additional regional and national tournaments. The TDC and Sports Commission staff needs to engage in a progressive

dialog with area sports/events leaders on the expansion of their existing franchises, and also the creation of new events within the successful structures that already exist (examples: replicating events like the USSSA tournaments, Half Mile cross country run, and the Suwannee Bicycle Association races, rather than bidding against other cities for events through the usual RFP process). Growth of existing events and the creation of new properties will likely lead to opportunities to expand into multiple championships over additional weekends across all sports. Where the CCSC can help build recurring community “owned” events and championships, Columbia County won’t have to rely as much on bid-in events to fulfill its tourism mission.

(Activation Costs: \$10,000 - \$20,000 per year to serve as seed money for new/created events).

### Secondary Recommendation #1: Venue Development/Enrichment/Usage

As the refocused Sports Commission matures, the Consultant Team recommends the CCSC and its leadership group expand its sports tourism work in three (3) additional areas as outlined here:

1. Infrastructure Challenges – In order to be a valued community partner over the long haul, the CCSC needs to be able to offer support for future venue expansion. Creating a venue improvement fund (see below), and/or finding consistent ways to support area venues and their events will allow the CCSC to grow its impact in Columbia County for not only tourism, but also for community user groups.

(Activation Costs: Nominal in this phase).

2. Sports Venue Improvement Fund – For the Sports Commission to positively impact Columbia County’s grass roots sports events community, the Commission must identify a funding mechanism for venue enhancement projects. This would include special projects needed to consistently land major regional and national tournaments for the area. All venues that are used to host regional and national tournaments should provide permanent restrooms and concession facilities, television ready lighting, adequate parking on site, a championship field, wifi coverage, a tournament office to serve as an operational headquarters, and adequate power locations to accommodate television or new media style broadcasts. In addition, it is recommended that the addition of artificial turf fields to the multi-sport field facilities (which would help “non-traditional sports” such as lacrosse/rugby/ultimate). In the case of turf additions at the multi-purpose fields, such upgrades would assist with field wear and weather related issues. Adding artificial turf would greatly enhance the flexibility of the County’s venue mix for both community user groups and also tournament play. The Consultant Team believes the top priorities for the improvement of the outdoor facility offering should be: (1) providing adequate lighting and infrastructure for the current facilities/fields in the region, (2) expansion of the multi-use flat-field facilities, and (3) addition of turf fields. Numerous cities are increasing

their bed tax rate and/or using a food and beverage tax to put towards the construction and/or operation of new sports facilities (Examples: Evansville, Shreveport, Spokane, Appleton, Tulsa, Eau Claire, Fort Wayne, Ashland, Millville, etc.). See Appendix B for additional details on this topic.

(Activation Costs: \$50,000 - \$100,000 per year in addition to the current \$300,000 parks and recreation contribution).

3. Multi-Purpose Fields – The Consultant Team offers up one conditional recommendation related to multi-sport fields. Should the existing agreement with the soccer club be amended to give control of the schedule outside of 18 months to the CCSC, the Consultant Team recommends that a study be conducted to evaluate the impact of a new multi-sport (flat field) complex. The existing flat field inventory in the County is lacking, however without control of the calendar to secure key weekends for tournament play, there is no reason for the TDC/CCSC to invest in new infrastructure either financially or politically. The upside is that a new facility for soccer, lacrosse, ultimate, football, and additional sports could open up land at the existing Southside complex for a much needed softball pinwheel. However, without a change in how these facilities are booked, this recommendation is moot.

(Activation Costs: \$15,000 - \$20,000 for a study on the economic impact of a new multi-sport flat field complex in Columbia County).

4. New Multi-Purpose Venue – The three recommendations made above are the key items at this point in the County’s progression to attract more sports tourism dollars. Once those three projects have been explored, the Consultant Team offers up one stretch goal for community consideration. The Consultant Team believes that the County should investigate further the concept of a new multi-purpose indoor venue. The region is void of any significant indoor space that could drive additional overnight stays through sports, meetings, and conventions. A well placed multi-purpose facility (situated near infrastructure that provides for a tournament and meeting friendly destination such as hotels, restaurants, and retail outlets) would be beneficial to most all areas of the tourism market, and could also provide a venue for community use such as consumer trade shows, civic group meetings, graduation ceremonies, and the like. Noted previously, the ability to increase tourism in shoulder and off-peak seasons is predicated on having suitable, and available, venues. The Consultant team recommends that the CCSC and its local champions evaluate the potential development of a new indoor facility to host sporting events as well as meetings and community activities. This project could take on many different shapes, including the development of an entirely new facility, or the repurposing of an existing building. An indoor facility offering would allow for Columbia County to host numerous events in the fastest growing indoor sports, and to diversify beyond baseball and softball. The growing sports opportunities could include:

- Mixed Martial Arts (MMA) – Core participation in MMA competitions is up 77% over the past three years, totaling over 1.29 million athletes.
- Pickleball – USA Pickleball’s membership has grown four-fold in the past three years.
- Cheer and Dance – 1.6 million core participants engaging in the sport at least 13 times per year.
- Additional Growth – Boxing and roller hockey also offer a significant growth market in the indoor sports space, rising in core participation 41.4% and 39.5% since 2012, respectively.

An indoor option would also allow for the hosting of many of the larger more traditional and established sports competitions, including:

- Basketball – 15.636 million people in the United States are considered core basketball players, participating in the sport 13 or more days per year.
- Volleyball – Has a core audience of nearly 3.6 million people.
- Indoor Soccer – 2.656 million core athletes participating 13 or more times a year.
- Archery – Core athlete participation (26 or more days per year) in Archery is up 8.1%.\*

\* – The statistics noted above were obtained from the 2016 Sports & Fitness Industry Association’s annual sports participation report. The study measures participation changes over 1, 3, and 5-year changes.

While the development (or redevelopment) and construction of such a facility are outside the scope of this project, basic multi-use facilities can be brought to market for between \$125 (basic build out) and \$185 (higher end product) per square foot, depending on varying market factors. These estimates do not include land acquisition, nor any additional city services that may be needed such as sewage, electrical, right of ways, etc. Assuming a mid-tier build out at a \$150 per square foot price point, a new 100,000 square foot building on city or county owned land would cost \$15,000,000 to construct. The Consultant Team recommends that a deeper dive feasibility study be conducted which includes the anticipated ideal size of a new multi-us facility, potential costs and timeline of construction, an evaluation of potential sites, as well as the economic impacts of the new venue including projected direct visitor spending models, events that can be attracted

with a new multi-purpose venue, and projected sales/hotel tax collections. In addition, the study should address various management models and the financial implications of each option. While it is outside the scope of this study, the national best practice of indoor multi-use facilities in markets similar to Columbia County seems to fall in the 100,000-square-foot category (in order to house eight basketball courts that can convert to 16 volleyball courts in one location).

(Activation Costs: Multi-purpose venue feasibility study \$40,000-\$50,000. New venue development \$15,000,000).

### Secondary Recommendation #2: Funding Model

A strong opportunity in the sports tourism and events space lies ahead in Columbia County, if and when a funding source can be identified to enhance the CCSC's current venue mix and sports development program. The Consultant Team would recommend that the TDC's existing reserves (estimated at \$1.6M) be used as "challenge" funds to attract additional public and private investment to drive the projects outlined above. The daily activities of the CCSC are funded through an allocation from the TDC, however capital projects will need a model to boost their priority in the community. The Consultant Team believes leveraging current reserves and future revenues is a model that should be pursued.

As noted previously in this report, numerous communities across the country are putting tourism based funding (tax collections) into bricks and mortar facilities. Currently, Columbia County is generating enough funds (through bed tax collections of 5%) to not only cover their annual marketing objectives, but to also reinvest some of these funds into capital projects to enhance the community's tourism revenues over the long-term.

Note: A summary of all recommended activation costs can be found in Appendix E.

### **Conclusion**

Columbia County has made a significant investment in the sports tourism marketplace over the past several years. There is additional opportunity to build upon the area's historical success in developing regional grass roots events, creating new event inventory, and hosting regional and national championships. In order to further enhance the impact of sports tourism on Columbia County, the CCSC needs to focus its efforts on three (3) overarching objectives:

1. Create a culture of sports tourism development, rather than purely sports sales.
2. Enhance the region's venue "tool kit" by improving the existing facilities.
3. Once the above items are achieved, explore the addition of multi-use venues, first outdoor, then indoor.

While the TDC is in good financial health, its sports marketing budget for the CCSC is still underfunded against its competitive set. In order to be effective, the Columbia County Sports Commission needs to be creative in how it promotes the destination, and in how it empowers its local event promoters to build a foundation for long-term success.

Specifically, the Columbia County Sports Commission (as a division of the TDC) should focus its resources on three (3) initiatives (or “Pillars” as outline in Appendix F). Each Pillar has a specific target audience, as well as tactics to achieve the Sports Commission’s goals for each area. The Pillars are meant to be simple and also clarifying, so both internal and external stakeholders can easily understand the mission of the Columbia County Sports Commission. The Pillars include the following three (3) focus areas:

1. Events – This two-pronged approach would include pursuing the traditional bid-in events with rights holders and National Governing Bodies (NGBs), as well as incubating and creating events with the area’s local promoters. As the Sports Commission’s expanded efforts take root and new (local) events are developed, there will be less of a need to focus on competitive bid processes to drive overnight stays. Both the traditional bid-in events as well as creating events that drive overnight stays will deliver on the CCSC’s tourism mission.
2. Venue Enhancement – Providing a revenue stream (challenge grants against cash reserves) and a master plan to enhance the area’s existing venues, to develop new facilities that positively impact tourism for the area, and that serve as assets for the region’s community user groups.
3. Community Engagement – Messaging the mission of the CCSC, the historical success of the organization to various stakeholder groups in a meaningful way.

The unprecedented growth of the sports tourism industry (see Appendix C) shows the high level of market sustainability that support the expansion of economic development in this space for Columbia County. The recommendations suggested here will not only positively impact the region’s tourism profile, it will positively affect the citizens and community user groups on a day-to-day basis.

Throughout this project subjects expressed a desire for community leaders to work together. There is a great deal of support for the CCSC to expand its reach in the sports tourism space. With that in mind, there is an opportunity for the CCSC to be the connection point for the community in the area of sports tourism through the development of new event and venue products. This investment will, in turn, help drive economic development year over year.

As in any new project, there are numerous variables that would need to be considered in evaluating the ROI and risk in expanding the CCSC’s tourism program, including the addition of new venue assets. It is the experience of the Consultant Team that the communities who

consider the overall impact on their tax base as a whole, will have more success than those that measure success purely by room nights or bed tax collections. That is, the cities that take into account the entirety of the community impact and total economic activity that is generated by a sports tourism marketing program, generally display a higher level of collaboration than those that simply measure heads in beds and sales tax totals.

In the eyes of the Consultant, the puzzle pieces exist in Columbia County to build upon the CCSC's past success and to compete in this highly competitive industry. The only question would be to what extent this sports development effort can be financially inclusive in order to better benefit the entire region. The Consultant Team believes it is within the power of Columbia County and its stakeholders to capture more opportunities in the sports tourism market, while also enriching the lives of its citizens. This community-wide effort will lead the area towards a "regionalism" mentality by connecting the tourism and business communities in an ongoing and proactive manner.

Final report submitted to Columbia County on April 7, 2017.

## Appendix A – Competitive Set Analysis

DMOs across the country are investing tourism related dollars (in the form of bed/occupancy or restaurant taxes) in facilities to attract incremental tourism dollars. These facilities can be in the form of grass roots sports parks or gymnasiums, convention centers, or multi-use indoor venues. In evaluating the gaps in Columbia County, multi-use spaces (both indoor and outdoor) are severely lacking. Adding multi-purpose facilities would allow the TDC/CCSC to drive additional visitation to the county, especially during shoulder and off-peak tourism seasons.

While the TDC is on secure financial ground, below is a snapshot of regional competitors that are active in the sports tourism market. Note the level of financial and also human capital investment of this competitive set. While some of these markets are larger in population, the ratio of their investment in sports tourism are far beyond that of Columbia County.

Destination	Sports Marketing Budget	Population	Structure	Staff Size	Measurement Matrices
Polk County Sports Marketing	\$ 1,787,200	623,009	Blended	7	Economic impact
Palm Beach County Sports Commission	\$ 692,760	1,372,000	Stand Alone	9	Room nights, event bids, site visits, funding of events, host/support events, TV coverage
Leon County	\$ 480,000	281,845	Blended	2	Room nights, # visitors, # events, # of local teams, direct spending
Pensacola/Escambia County	\$ 460,000	305,817	Stand Alone	6	Room nights, economic impact, seasonal impact, image enhancement
Lake City/Columbia County	\$ 336,500	67,543	Blended	1	N/A
Daytona Beach/Volusia County	\$ 130,000	494,593	Blended	2	Prospects, leads, definite business

**Note:** Lake City/Columbia County’s \$336,500 sports marketing budget includes a \$300,000 payment to the parks and recreation department, in essence leaving only \$36,500 with which to market the destination.

## Appendix B – Trends in Sports Facility Funding

The most common funding source for new facilities is a general fund allocation from the city/county where the facility is located as well as a land contribution for the venue to be constructed (again donated by the city or county). Although the level of success is yet to be determined, several communities around the country have already, or are in the process of, raising their bed tax collection rate to fund sports-related facility development, including:

- Evansville (IN) recently opened a new \$15 million multi-use outdoor sports complex that is entirely funded by bed tax dollars. The future management of this facility will also be funded by bed tax dollars and it is run by the CVB itself.
- Spokane (WA) is in the process of bonding \$25 million against future bed tax collections to construct a new athletic field house.
- Shreveport (LA) recently passed a bed tax increase for the expansion of their sports commission's national marketing program. This new tax also supports the Independence Bowl (venue enhancements) and the regional airport (incentives for new airline routes). This combined effort between three of Shreveport's leading agencies shows the economic development impact that sports tourism can have on a mid- or small-size market.
- Fox Cities (Appleton, WI) recently raised their bed tax rate from 6% to 10% to build a convention center, a new large (hardwood) indoor sports complex, and to renovate three existing sports facilities used to attract regional and national tournaments.
- Rockford (IL) having already finished a significant expansion of its outdoor sports venues, used bed tax dollars to bond \$10 million towards a new indoor facility. The Downtown Sports Complex carried a price tag of \$24 million and opened in late 2016.
- Placer Valley (CA) is allocating funds from an increased bed tax as well as a new hotel assessment to construct and manage a \$35 million multi-use all turf sports complex. The venue will be managed by the area tourism bureau and is slated to open in 2017.
- Pasco (FL), in partnership with the Florida Sports Foundation, is in the process of developing a new sports complex on 120 acres of county-owned property. Pasco County is investing \$11 million to the project, including \$8.5 million in tourist tax funds and \$2.5 million in unrestricted bond proceeds.
- In January 2016, Warren County (OH) raised the lodging tax one (1) percent to finance a \$10 million, 20 field sports complex. The rate hike increased the county hotel occupancy tax from 3% to 4%. The tax will be used over 20 years to pay off debt the Warren County Convention & Visitors Bureau will take on to pay for the complex.

## Appendix B (Continued) – Trends in Sports Facility Funding

In addition to the hotel tax examples noted on the previous page, several communities have implemented a food and beverage tax for the purpose of developing or enhancing sports facilities.

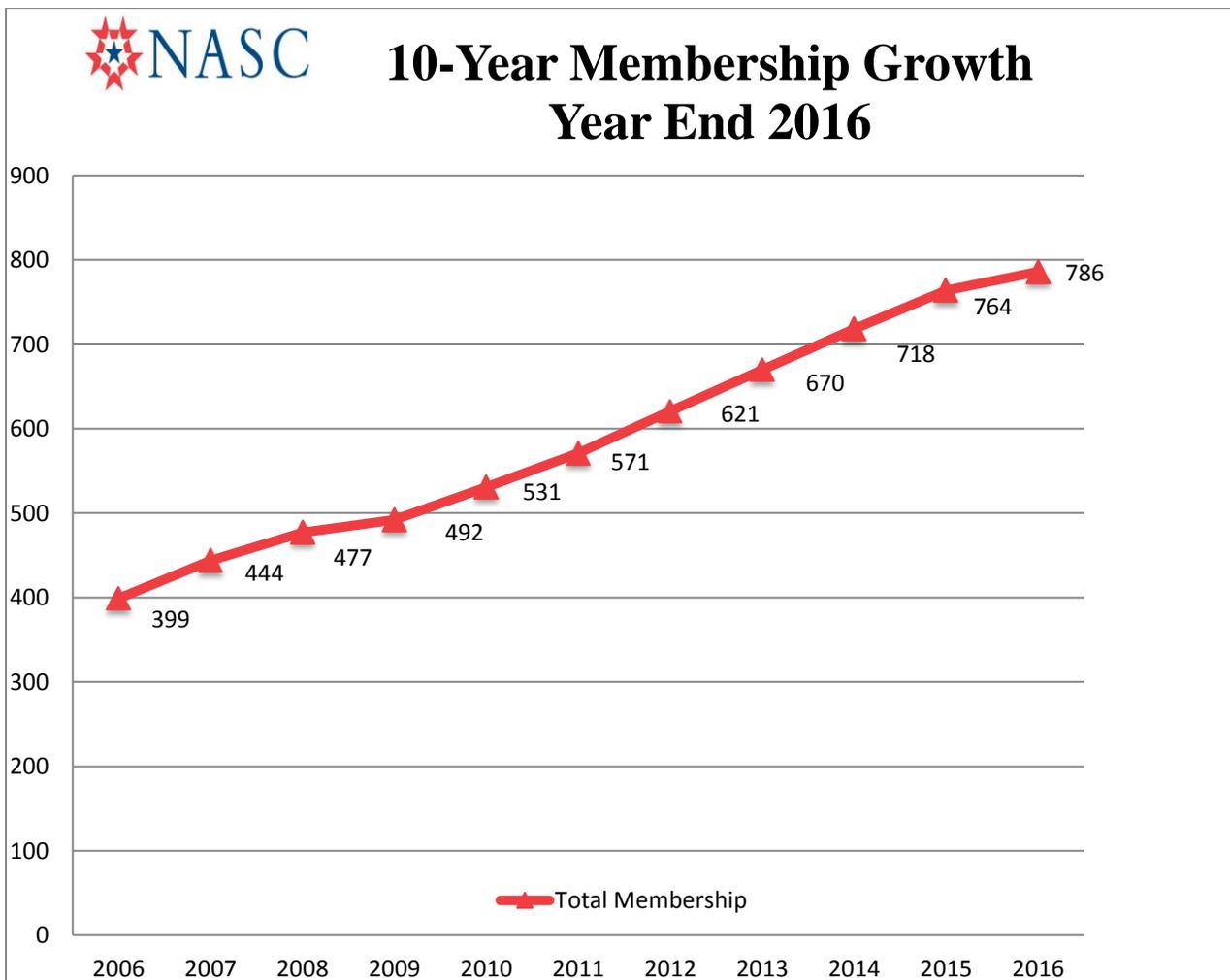
- For the past 30 years, Fort Wayne (IN) has implemented a 1% food and beverage tax that is used for capital projects. This program has funded several new buildings at the site of the Allen County War Memorial Coliseum arena, including a 100,000 square foot expo center and 5,000 seat baseball stadium. These funds have also been used to renovate the arena's ice floor, to add 2,500 seats and meeting rooms to the arena. Currently the program is used to by the City's Capital Improvement Board to finish the financing of major capital projects such as a new hotel in downtown next to the convention center, building an industrial building to retain a major employer, and helping to build a parking garage to attract a major mortgage company to downtown. The fund generates \$7.5 million per year and is currently being considered to help finance a new arena downtown.
- Ashland (OR) employs a 5% food and beverage tax which garners nearly \$4.5 million a year. 20% of these funds are allocated to the acquisition and preservation of open spaces for parks and recreation. 80% of the funds are used to retire debt for a recently completed community-wide waterway enhancement.
- Historically, King County (WA) has used intermittent funding from food and beverage taxes to build stadiums such as the King Dome. While this program is not active today, it has been a tool the Greater Seattle area has used in the past for venue development to entice professional sports teams to the area. Similarly, the State of Florida has a professional league stadium venue development program that is also funded by temporary food and beverage taxes, when needed. Finally, Milwaukee used a food and beverage tax to build Miller Park, home of Major League baseball's Milwaukee Brewers.
- In 2007, the State of New Jersey created the "Sports and Entertainment District Urban Revitalization Act." This legislation authorizes a municipality to establish a sports and entertainment district within that municipality. The act authorizes the establishment of one or more new local taxes and dedicates the revenue from some or all of those taxes to financing projects in the sports and entertainment district. Under this legislation, the community of Millville levied a 2% local food and beverage tax to fund the Millville Sports and Entertainment District, and in turn, the development of the New Jersey Motorsports Park, a 500 acre sports and entertainment destination that hosts numerous events including NASCAR racing.

It should be noted that different States have different regulations regarding the use of bed tax funds. The cases outlined above are not exhaustive, and should be viewed only as examples for further discussion.

## Appendix C – National Association of Sports Commissions (NASC) Membership

Sports tourism has grown exponentially over the past two decades. The nature of the industry is that it is relatively “immune” to market factors such as troubled economies, war, high unemployment, 9/11, or similar factors. Studies by the NASC show that the grass roots sports tourism industry is worth over \$9 billion and that there are more events today, with more participants competing in those events, than ever before.

Projections indicate that the grass roots sports tourism industry (exclusive of mega events like the Superbowl, Final Fours, etc.) is growing at a pace of 12-14% per year, with more growth anticipated in the coming decade. Below is a chart outlining the growth of membership organizations within the NASC, which is a direct correlation to the growth of the sports tourism industry as a whole.

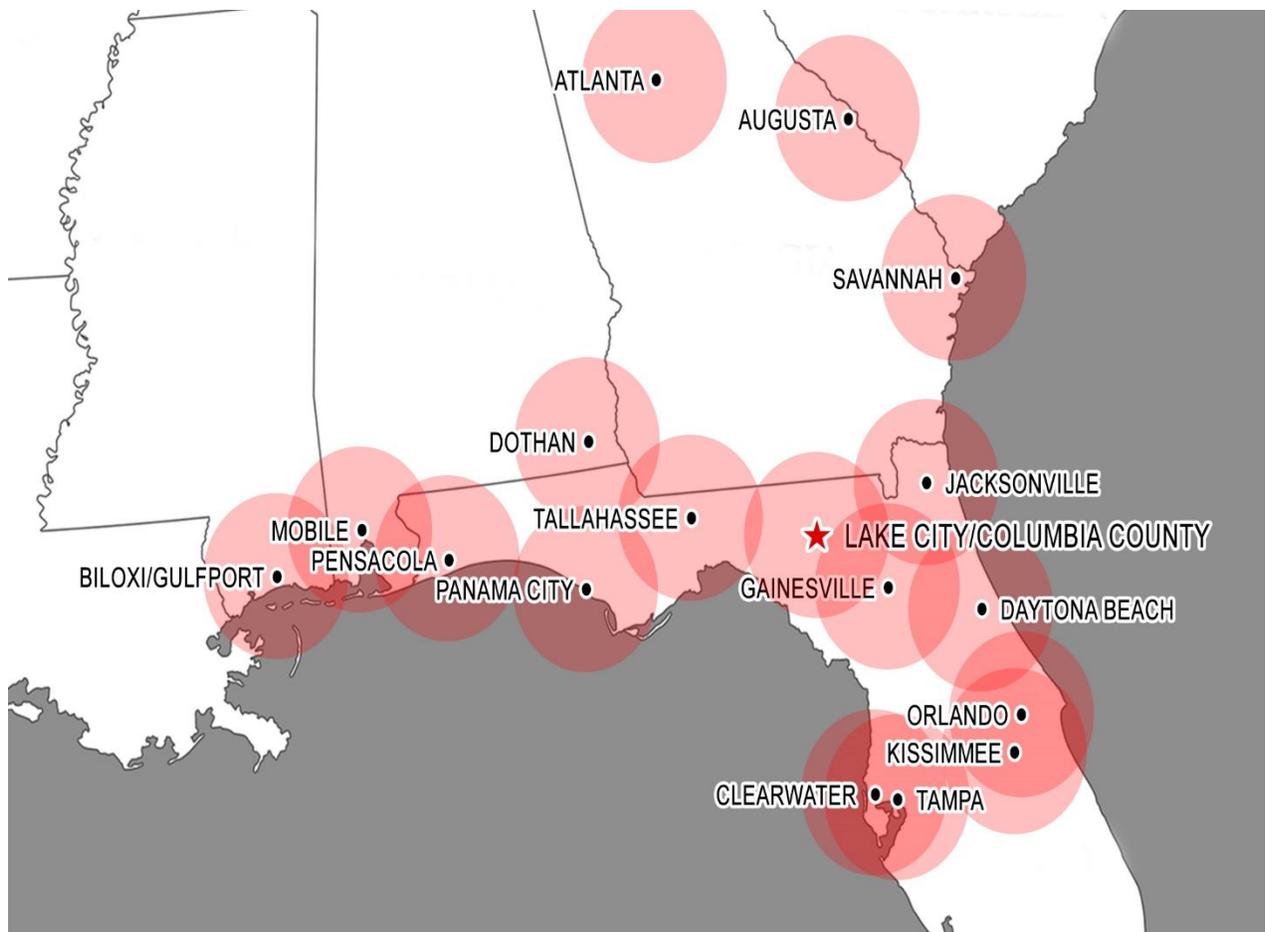


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## Appendix D – Regional Competition Analysis

The sports tourism and events industry is as competitive today as it has ever been. Numerous destinations market themselves in this niche industry in the form of a DMO, sports commission, city, or through an alternative organization.

Below is a visual representation of the various entities in Columbia County's region that are active in the sports tourism and events space. The circles surrounding each city represent a 100-mile drive market for local and regional events. While tournaments often attract teams from as far away as a full day's drive, this graphic shows the significant level of competition in this industry and the high level geographic overlap amongst these communities.



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**Appendix E – Columbia County Sports Commission  
Summary of Activation Costs (Primary Recommendations)**

Director of Sports	\$60,000 - \$75,000
Targeted (National) Outreach	\$5,000 - \$10,000
Strategic Partnerships	\$2,500 - \$5,000
Local Promoter Support	\$10,000 - \$20,000
<b>Gross Total</b>	<b><u>\$77,500 - \$110,000</u></b>
Current/Traditional Sports Marketing Activities	\$36,500
<b>Net Total (Projected Annual Budget)</b>	<b><u>\$114,000 - \$146,500</u></b>

**Venue Development Concepts\*  
Summary of Activation Costs (Secondary Recommendations)**

Venue Improvement Fund	\$50,000 - \$100,000
Multi-Sport (Flat Field) Feasibility Study	\$15,000 - \$20,000
Multi-Purpose Venue (Indoor) Feasibility Study	\$40,000 - \$50,000
<b>Gross Total (No Multi-Purpose Venue Constructed)</b>	<b><u>\$105,000 - \$170,000</u></b>

\* - Note the assumptions made for a new Multi-Purpose venue within the body of this report. This is a broad-brush estimate that should be studied in more depth. The Consultant Team makes no guarantees or representations about the final cost of construction of a new Multi-Purpose venue in Columbia County.

**Appendix F – Columbia County Sports Commission  
5-Year Strategic Mission Pillars**

In the future, Columbia County’s enhanced sports tourism effort should sharpen its focus on three (3) key mission areas, or “Pillars.” Each Pillar is driven by a different audience, all focused on increasing overnight stays in Columbia County. This refined focus will help the TDC/CCSC enhance its messaging and will deliver directly on the organization’s mission. The recommended Pillars are below along with their driving audiences/factors.

<b>Columbia County Sports Commission 5-Year Strategic Mission Pillars</b>			
<b>Pillar</b>	Events Bid/Created/Owned	Venue Enhancement	Community Engagement
<b>Audience</b>	Tourism Economic Development Rights Holders/NGBs Local Promoters	Hospitality Leaders Elected Officials Economic Development	C-Level Community Leaders Local Media Non-Profit Civic Groups Hospitality Community
<b>Tactics</b>	RFPs & Event Bids Grants/Incubator Program Grow existing events 10%/Yr. Create one new event/Yr.	Retained Earnings Venue Development Fund Feasibility Studies New Multi-Sport Venue(s)	“6&6” Lunches Economic Impact Releases Corporate Support/Recognition National Outreach

## Columbia County Tourist Development 2019-2020 TDC Advertising

Madden	SEM 12-month/Story Telling	\$ 72,000.00
Connect	Social Media 12 months (\$6,000 for boosted posts)	\$ 30,000.00
How to Do Florida	TV	\$ 24,500.00
Socratik	SEO	\$ 24,000.00
Vacation Guide	Print and Digital Guide	\$ 12,000.00
Madden	Retargeting - Spring/Fall	\$ 10,000.00
Website (#Get Social)	Hosting/Updates	\$ 10,000.00
Promo Items		\$ 10,000.00
Visit Florida	Kids Corner I-75 Welcome Center	\$ 8,000.00
Local	Local Education/Advertising	\$ 3,125.00
Visit Florida	Map (Columbia, Gainesville, Gilchrist)	\$ 3,000.00
Visit Florida Visitor Guide	1/6 Page Ad (Columbia, Gilchrist, Hamilton, Madison, Taylor, Monticello)	\$ 1,383.00
Paddle Florida	Website Advertisement	\$ 500.00
Misc.		\$ 4,000.00
<b>Total</b>		<b>\$ 212,508.00</b>