

City of Pompano Beach Tourism Strategic Plan

Tourism & Destination Advisory | 2022





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Executive summary

Overview

The City of Pompano Beach (City) has renewed its interest and commitment to tourism industry businesses by refreshing a multi-year Tourism Strategic Plan (TSP). The goal of the TSP is to further the 2011 plan and create a road map to enhance the tourism product, refine the marketing strategy and determine organizational needs to execute a comprehensive tourism plan while keeping balance with the residential community.

To facilitate this process, the City engaged a third party to provide an objective look at the destination and its positioning and engage with its stakeholders to determine the path forward. JLL's Global Tourism & Destination Advisory practice facilitated this process over the course of nearly 10 months.

The planning process was conducted in four phases:

- 1. Stakeholder Engagement**
- 2. Market Study**
- 3. Priority Identification & Organizational Assessment**
- 4. Recommendation & Plan Development**

This process enabled opportunities for industry and community feedback, market research and competitive positioning research to inform the recommendations. Over 80 stakeholders participated in the TSP's development including the Tourism Committee whose leadership guided this process through monthly meetings and review sessions.



Outcomes

The TSP includes seven key priorities, each with research-based strategic direction, recommendation(s), action items and milestone timelines for achievement. The priorities are as follows:

Product Development - The recommendations for product development tie to several areas including using tools from the TSP to proactively solicit desired investment including potentially a full service upper, upscale or luxury hotel brand to be confirmed through a feasibility study. Additionally, directly linking the existing cultural amenities with programming for visitors should be strengthened to drive visitor traffic and spending into these culture assets. This also includes live music and the activation of the amphitheater.

Maintain Investment in Current Demand Drivers - These recommendations are made around Pompano Beach's existing natural resources that currently cause the visitor to choose Pompano Beach. Continued investment and care for these resources should be a top priority.

Direct Marketing - The recommendations for direct marketing is to focus tourism resources on target markets that are a fit for Pompano Beach through email and social media targeted marketing with calls to action and offers for overnight stays to increase conversion to Pompano Beach. All budget dollars for marketing should be tied to direct marketing campaigns executed by the Tourism division and leave the general awareness marketing efforts to the CVB.

Mobility & Connectivity - The recommendation for the transportation strategy is to advocate for the expansion and further enhance the existing circuit transportation product that is already in place. It is recommended that a P3 model for a multi-phased mobility and connectivity "route" is developed by the Tourism division in conjunction with the Tourism Committee, partners and City leadership.

Event Strategy - The recommendation for event strategy is to further customize and implement the event matrix in three practical applications: pre-event scoring mechanism to determine funding and sponsorship needs, post-event scoring to determine success against the KPIs, and as a tool to work with organizers to recruit new events and curate events that are a fit for Pompano Beach.

Organizational Resources - The TSP will be an effort in partnership however the ability to move implementation forward will come from the Tourism division. The Tourism division will need the resources to support the broad-based implementation of the plan and the ongoing to raise awareness and support product development.

Neighborhood Preservation & Visibility - The recommendation for neighborhood preservation & cultural tourism development is to develop a program in conjunction with the Cultural Affairs Department to identify neighborhoods and individual neighborhood assets within the Cultural Affairs portfolio to brand the community and provide visitors with a neighborhood driven experience.



Stakeholder engagement

A major goal of the TSP process was to engage local stakeholders. In identifying priorities, we needed to listen to and address industry stakeholder wants, needs and concerns for the future. Through this process, several mechanisms were used to engage stakeholders:



10 Tourism Advisory Committee meetings made up of **12** community and industry leaders



Individual interviews and follow up calls with **46** local community stakeholders



Stakeholder survey reached **120+** with **37** additional responses

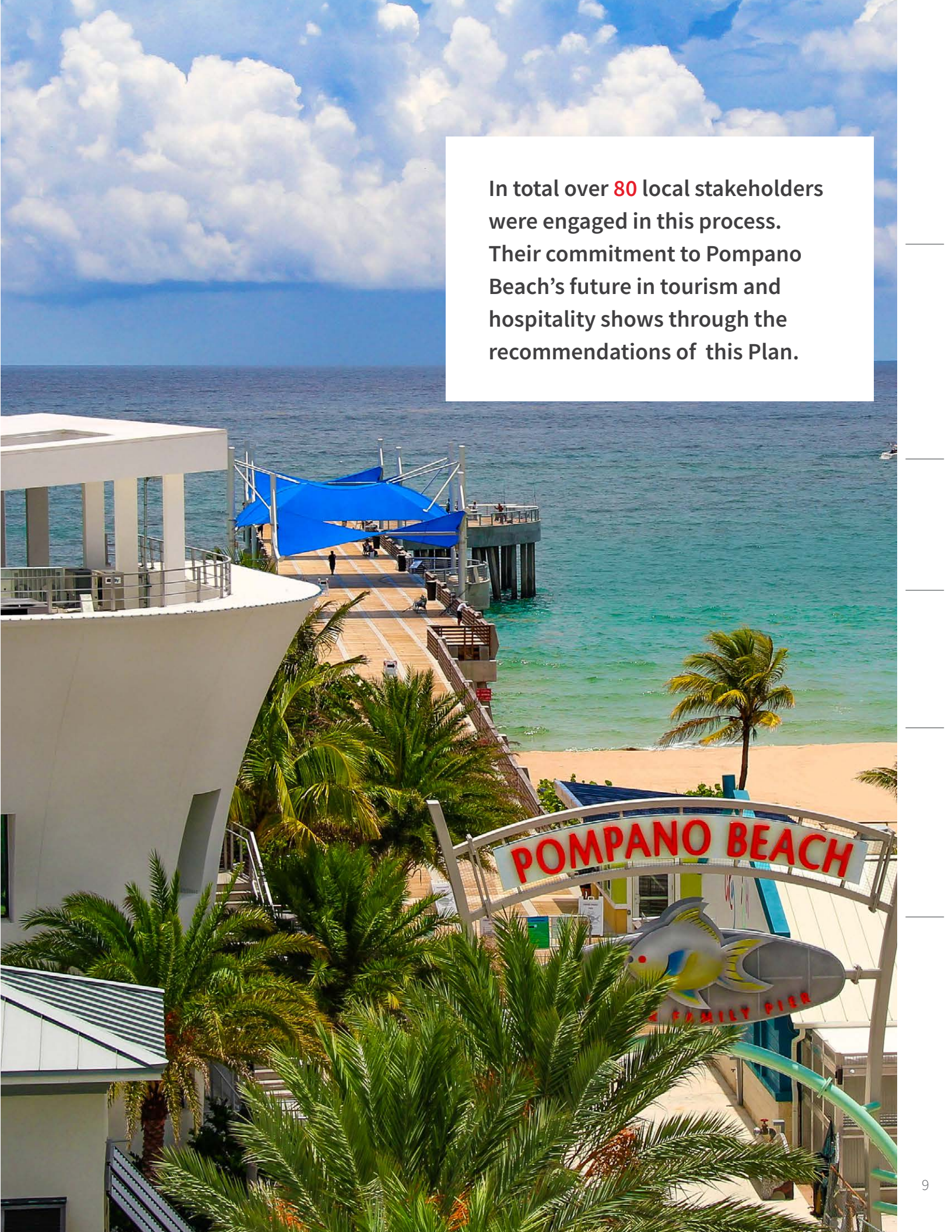


Multiple strategic sessions with the Cultural Tourism Master Plan team.

+80

Local stakeholders were engaged in this process. Their commitment to Pompano Beach's future in tourism and hospitality shows through the recommendations of this Plan.

In total over **80** local stakeholders were engaged in this process. Their commitment to Pompano Beach's future in tourism and hospitality shows through the recommendations of this Plan.



Summary of Outcomes

Stakeholder feedback provided insightful guidance and direction to become the basis of many of the priorities and recommendations of the DSP. A summary of the key themes is listed below:



Stakeholders felt strongly about Pompano Beach’s current positioning and the importance of planning for the future



The specific welcoming nature of Pompano Beach should continue to be highlighted to visitor audiences



Pompano Beach has invested in a family-friendly brand and should continue to invest in that



The tourism product is light in high quality hotels and amenities. The community wants to see greater investment in new product



The additional tourism assets and amenities lend themselves to niche audiences, i.e., diving, water sports, cultural tourism, etc. and tourism efforts should focus on targeting those segments with compatible experiences



New pipeline of hotel, economic and destination development products should be proactively pursued to achieve a long-term vision of aspirational growth



Interest in the water taxi’s expansion and ultimate success is a priority



Sports tourism remains a focus



Waterfront access is a challenge due to lack of real estate



There is room for growth in cultural arts opportunities and tourism partnerships



Off beach activations needs to be a higher priority

The TSP process leveraged this feedback to conduct significant research and validate direction for the future of the destination.

The stakeholder process and individual interviews revealed the importance of maintaining and ongoing dialogue with stakeholders. It is recommended that the stakeholder outreach conducted be considered a “kickoff” to a new stakeholder communication and engagement plan as part of the TSP’s lifespan. For example, integrating “town hall” sessions with stakeholders two times per year to supplement the stakeholder survey will likely deliver increased engagement in the future and the survey should be considered a baseline or a starting point to build from in future years. This is discussed further as a recommendation in the organizational resources of the plan.



Market study

Market Study Components

The foundation of the TSP is built on a combination of market research and validation of stakeholder engagement and participation. The market research conducted for the City of Pompano Beach Tourism Strategic Plan included the following elements:

- **Tourism Asset Review**
- **Tourism Event Assessment**
- **Lodging Market Review**
- **Visitor Segmentation Analysis**
- **Neighboring Communities Review**
- **Destination Benchmarks**
- **SWOT Analysis and Outcomes**

Each of these elements included detailed research and collaboration with the City of Pompano Beach's Tourism division and monthly engagement with the Tourism Committee.. The following are the outcomes from the Market Study:



Market Study Outcomes

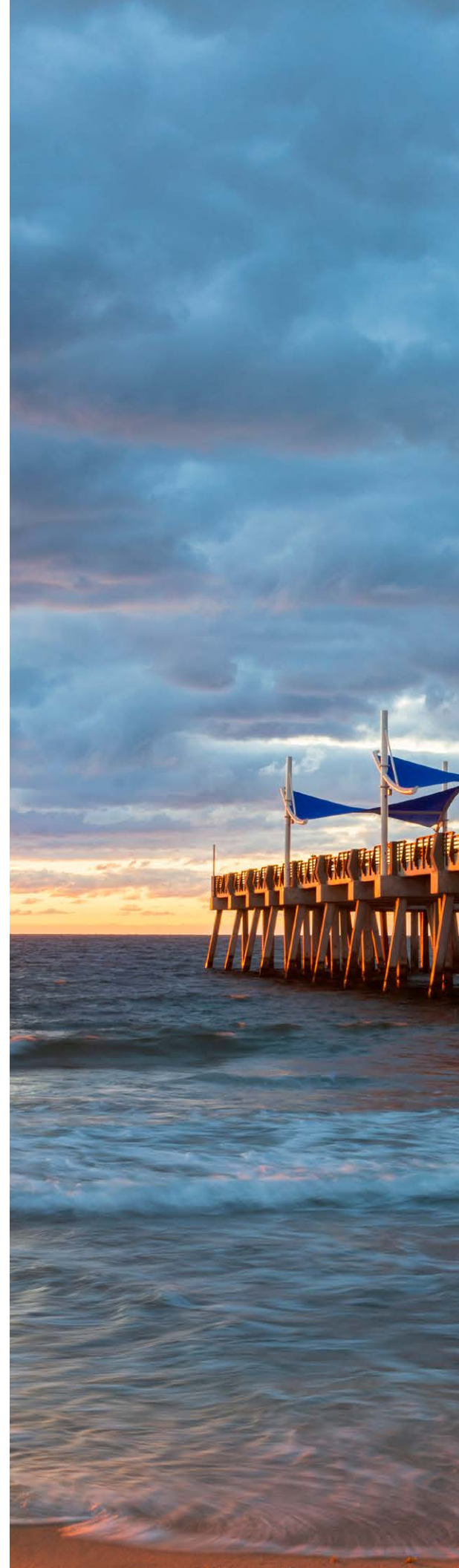
Tourism Asset Review

Pompano Beach is a destination comprised of a variety of assets and attractions. The quantity and quality of these assets as it relates to causing incremental tourism to the City was studied in detail for the TSP. The process included an inventory of these assets and an analysis of those key assets causing visitation on JLL's proprietary Demand Driver Score Card.

The Demand Driver Score Card serves to analyze the weight any individual asset has in causing the visitor stay. The analysis is a multistep assessment of destination assets. The higher the score the more likely the asset is to drive incremental visitation. The multistep process included:

- **Utilize visitor traffic and flow data to assess current demand**
- **Place individual assets on scale based on eight criteria to score**
- **Rate anything that scores 60-70 or greater as a Pompano Beach's "Attractor"**
- **Utilize the outcome to identify current and future opportunities for competitive positioning**
- **Recommend new investment or enhancement to grow assets on the scale**

The Demand Driver Score Card includes eight key criteria with a total value of 100 points. Those assets and amenities scoring above a 60 are defined as demand drivers that cause visitation, those are attractors. The visitation draw is scaled from 60-70 as a regional draw, 80-90 as a national draw and 90-100 as a global draw. Competing for leisure visitation is increasingly competitive and the Demand Driver Score Card outcomes help identify current positioning as well as opportunities for future concentration and growth. See the appendix for the full results of the Demand Driver Scorecard analysis.





This process identified that Pompano Beach has a small collection of assets scoring a 60+ on the Demand Driver Score Card with the ocean, water activities and the beach overall scoring the highest at an 84 and 83 respectively, with Shipwreck Park achieving an 81. These assets alone are attractors capable of garnering interest and visitation for the regional, state, and national audiences and even tipping potentially into the international audiences. The Pier was close to this national grouping of demand drivers with a score of 79. Additional regional attractors included the Isle Casino Racing, the Amphitheater, McNab Park, Historic District and the waterfront dining experiences. These individual assets combine to create a critical mass of things to do, which ultimately causes the visitor to choose Pompano Beach as their destination of choice.

The outcomes from this analysis also identified where there are gaps in product and supported the formulation of several priorities and subsequent recommendations on positioning Pompano Beach for growth and driving new product development for the future.

Additionally, the Demand Driver Score Card outcomes reinforced the importance of regional and instate markets as key targets for direct efforts to increase visitation in shoulder and off season time periods. It also underscored the importance of developing “experiences” that appeal to targeted audiences when addressing product gaps in the future.

Event Inventory Analysis – Signature Event Development

Events are a critical factor in any tourism plan and a dedicated event strategy can be a catalyst for putting a destination on the map. A custom developed “Event Matrix” was used to determine how Pompano Beach events performed. The TSP process included a review of the existing events that truly have a tourism potential and can be directly marketed to a specific visitor audience.

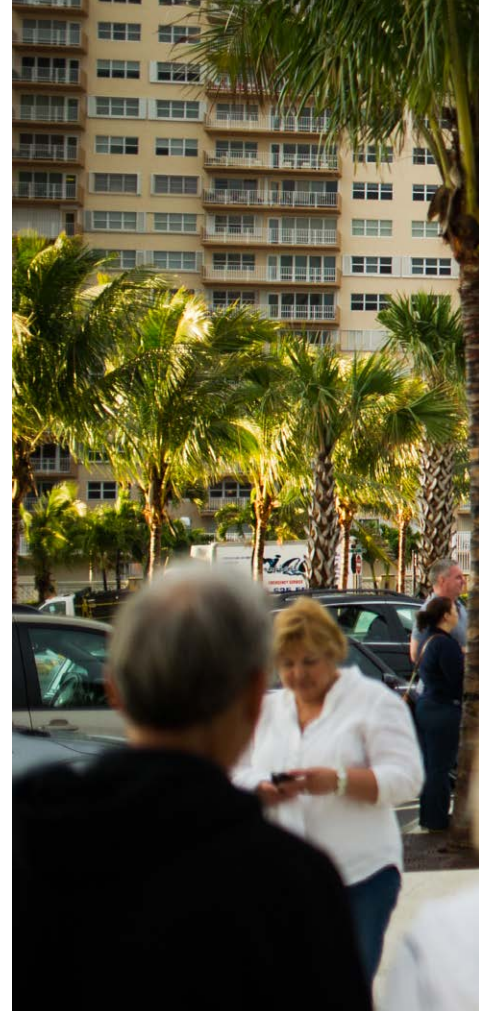
The “Event Matrix” utilizes criteria that cause events to drive visitation returns to understand the current landscape of events generating the desired outcome and position Pompano Beach Tourism division to support up and coming events to be successful. The process included:

- **Identifying key events currently serviced by Pompano Beach Tourism division**
- **Rating event on matrix using 13 criteria**
- **Identifying those events that can grow in specific areas through matrix outcomes**
- **Creating a platform to recommend steps that can be taken with interested organizers for to develop and increase overnight visitation in the future.**

The outcomes from this analysis identified that there are no events currently of this caliber, however it was determined that prior events that occurred in Pompano Beach did have this potential and this motive. The Events Strategy priority expands on this potential for the future and further details the recommendation around a dedicated events strategy.

This process also was conducted in collaboration with the Cultural Arts Master Plan. There is strong potential for the development of new “signature events” which is identified as a priority in both this plan (see Event Strategy Priority) and the Cultural Arts Master Plan.

The priorities and recommendations are further supported through this aspect of event development as well as the role Pompano Beach Tourism division plays which are expanded upon in the plan recommendations.





Lodging Market Review

The TSP process also looked closely at the hotel inventory and performance as well as the shared accommodations inventory and its impact on the lodging landscape. In total, Pompano Beach has 27 hotel/motel properties with just under 2,000 rooms. Most of that inventory offers limited service with just about half of all hotels identifying as economy class and another 11% identifying as midscale class. With about 60% of the inventory in this category most of the accommodations today are at a less desirable scale for Pompano Beach's current traveler. Only 7% of the hotels are considered upscale and there are no luxury hotel properties. Many of the limited-service properties have a small room count or are only several units. Vacation rentals are not included in the hotel inventory and are included below in shared accommodations. Similarly most timeshare properties that are not associated with a hotel brand and have minimum stay requirements will appear within the shared accommodations inventory.

Pompano Beach is currently tracked as a submarket within Broward County, however the submarket includes more than Pompano Beach and therefore skews the reporting for Pompano Beach. At the time of this report the submarket that includes Pompano Beach was the lowest performing for both Average Daily Rate (ADR) and Occupancy. However, if the report was broken out to be exclusively Pompano Beach, reporting would be more accurate. It is recommended that the City buy quarterly reports from STR if the County cannot break Pompano Beach out separately.

Additionally, Pompano Beach has over 1,100 time share units ranging from studios to 4 bedrooms accommodating up to 10 visitors per unit, this market segment is significant to the visitor spending in Pompano Beach. These time shares are part of both the hotel brand inventory as well as listed within the shared accommodation space.





Shared Accommodations

While the traditional hotel inventory sheds light on the industry's performance today, the shared accommodations industry adds another layer for consideration. The shared accommodations market in Pompano Beach (Airbnb, HomeAway, VRBO, etc.) represents another 3,353 "rooms" across 1,863 active rentals, at the time of this report. Those rentals average a \$199 ADR and a 63% occupancy rate. While not a true "apple to apples" comparison, shared accommodations achieve an ADR 42% higher than the hotel average, but occupancy is 18% less than the traditional hotel accommodations. The shared accommodations market has grown 123% since 2018. This speaks to the absorption of the new inventory that is causing the occupancy rate to drop. It should be noted that there are no statistics yet as to what percentage of time these units are being offered for rent at any time of the year.

The type of guest choosing a shared accommodation is likely a different type of traveler who needs more than a hotel can offer i.e., kitchen, multiple room types, etc. if they are traveling with a larger group and sharing in the cost therefore are more price conscious. However, it is also likely that a percentage of those guests choosing the shared accommodations in Pompano Beach are doing so because the hotel inventory does not meet their needs from a scale and amenities standpoint, further reinforcing the need for the hotel inventory to grow in the upper upscale segment.



Visitor Segmentation

Another key aspect of the market study was to determine the types of visitors choosing Pompano Beach today. Based on input from the stakeholders as well as the market research conducted by JLL, the following visitor segments were determined:

Demographics

Families with children under 12

- These visitors are beach goers looking to relax and take their kids to play and experience the water.
- These visitors are price sensitive and shop around the greater Fort Lauderdale area for a similar destination that they can afford.

Empty Nesters

- These visitors are in their third stage of life having no kids in the household and are either approaching retirement or are already retired.
- These visitors are price conscious.
- These visitors have the greatest flexibility to come during shoulder or off-season as well as the greatest ability to stay longer or return most frequently.
- These visitors want to experience the destination's scenery, arts and culture.
- These visitors are interested in traditional hotel and boutique style accommodations.

Younger Couples without children

- These visitors are younger and are either not married or recently married.
- These visitors are in the early stage of their careers and are building their income. These visitors are price conscious and are interested in the upper upscale as well as shared accommodations market for overnight stays.
- These visitors are driven by experiences. They will leverage the beach and water activities as the anchor to their stay but are often interested in local cultural activities, unique things to do and immersive experiences and active lifestyles.

Multigenerational Families with children under 12

- Similar to the above, these visitors are traveling with kids and grandparents.
- These visitors are also price conscious and need additional space and may often seek out the shared accommodations.



Niche Market – Divers

- Couples and small groups specifically interested in the diving experience at Shipwreck Park
- These visitors can range in age from 20-somethings to 60-somethings who have a passion for diving and travel to places specifically for those purposes
- These visitors are less focused on their accommodations and more interested in the multi-day dive experience
- These visitors may be price conscious because their investment is on the dive
- If flying, these visitors are likely to find cheaper airfare and spend more on the ancillary experiences before and after diving i.e., restaurants, nightlife and events.

Sports tournament attendees

- While not tied to leisure travel segmentation, the existing sports tournament market has been identified as an important segment for visitation.

Overall, these visitor segments likely have a household income of \$75,000-\$145,000. This household income is a match with Pompano’s current product mix. The recommendations contained within the priorities of this report will expand on opportunities to increase and enhance product offerings which in turn will reach a potentially higher-end visitor.



Geographics

The visitor segments coming to Pompano Beach today are primarily geographically located in the following areas:

Within the state of Florida

- Drive market to Pompano Beach coming from northern, western and central parts of the state

Northeast

- With the proximity to both the Fort Lauderdale-Hollywood International Airport (25 minutes) and the Palm Beach International Airport (50 minutes) air service into the destination is easy and affordable.
- Access to the many airports of New York, New Jersey and Pennsylvania the metro areas of the northeast are well serviced by direct flights on multiple airlines.

Southern and MidWestern States

- The southern metro areas of Atlanta, GA and Nashville, TN are also feeder markets for both fly and drive travel into Pompano Beach. Texas has also been identified as a market for Broward County.
- In addition, the midwestern states have grown as feeder markets for Broward County and is a target for Pompano Beach.

Canadian “Snow Birds”

- Affected by COVID-19 in 2020-2021, many Canadians with homes in Pompano Beach or who typically rent for several months could not visit. This travel segment is likely to return in 2022 reach pre-COVID levels by 2023. While Canadian “snow birds” are part of the mix, the Canadian market is not exclusively seasonal. With daily service from Montreal and Toronto year-round this segment should be explored further.
- Beyond these identified markets for Pompano’s Tourism Division, the Greater Fort Lauderdale CVB has data that shows broader markets that have an impact in the Fort Lauderdale area. It is also important to note that presently FLL also has flights from 37 Latin American and Caribbean Destinations. New start ups from Europe are already scheduled for summer 2022. These markets should be reevaluated and considered in the next 3-5 years as the plan progresses, but the immediate future for the Tourism Division to take action on are the primary markets listed above.

COVID-19 Digital Nomads

- With the impacts of the pandemic allowing “work from anywhere” policies to take hold of many deskbound workers, the ability to relocate and work remotely is, and will continue to, have an impact on Pompano Beach. These visitors are staying longer and behaving more like the “snowbirds” who have second homes in the destination. These visitors are looking for engaging experiences with a better day to day quality of life to live and work for 30+ days at a time.
- This trend will likely have staying power in a post-COVID world.
- While these visitors are the segments that are coming to Pompano Beach today, the priorities and recommendations of this plan will also contain strategies to increase and shift visitor profile to a higher spend and more diverse audience that could be a match for the future. The outcome of this research and the current and short-term opportunities to drive visitor demand would support a primary focus by the Tourism Division on the drive market with targeted experiences that are focused on the audiences noted above. The access via FLL is an incredibly valuable asset and should be leveraged, through the Greater Fort Lauderdale CVB.



Neighboring Communities

As part of the destination landscape, the Pompano Beach Tourism Committee wanted to study and leverage aspects of the neighboring communities to Pompano Beach. The communities included in this review were:

- **Deerfield Beach**
- **Hollywood**
- **Lauderdale by the Sea**
- **Dania Beach**
- **Ft. Lauderdale**

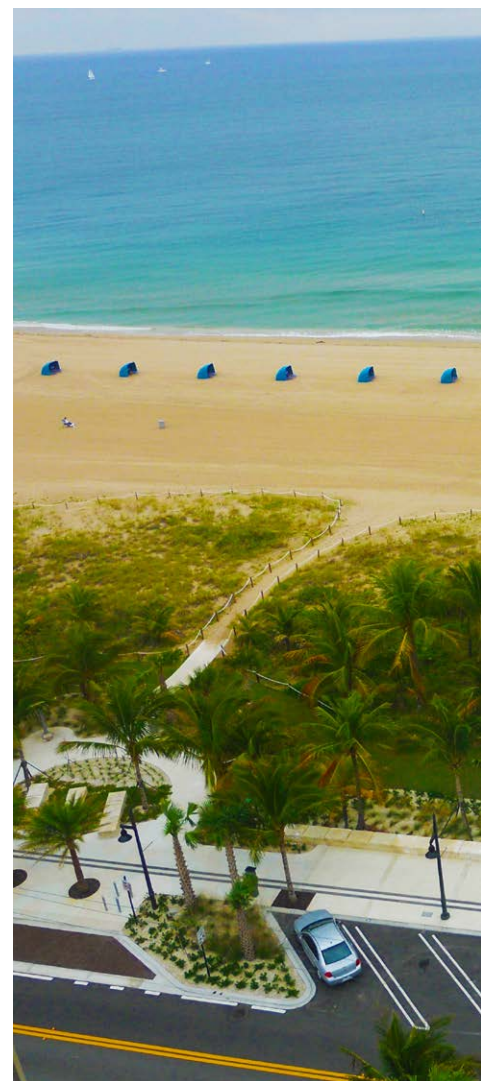
These communities have many similarities but also distinct differences from Pompano Beach including size of population and when it comes to the tourism product specifically.

For example, Deerfield Beach, only separated by a bridge to the north from Pompano, also has the same beach side amenities as Pompano Beach i.e., fishing pier and beach park, but also has its own boardwalk and watersports park. Additionally, there are some key events that draw increased visibility to Deerfield Beach like the Women's Professional Volleyball Association Tour and the Superboat Power Race. In Hollywood, which is located just south of Fort Lauderdale, the new Seminole Hard Rock Hotel & Casino is a new demand driver and is causing increased visibility overall to things like the ArtsPark at Young Circle, Downtown Mural Project and the Cinema Paradiso Art-House Theater. Both Deerfield Beach and Hollywood leverage the Fort Lauderdale location and positioning. Deerfield Beach and Hollywood both have a larger inventory of waterfront amenities, specifically restaurants, when compared to Pompano Beach.

Lauderdale by the Sea is Pompano Beach's immediate neighbor to the south. And while much smaller than Pompano Beach, Lauderdale by the Sea appears to have a very present and forward brand for visitors with signage and other branded elements welcoming visitors into the community.

The combination of amenities and brand positioning that these neighboring communities have put in place should be a point of leverage for Pompano Beach. And something as simple as branded signage should be considered as an outcome of this planning process.

In several of these neighboring communities, the city and/or tourism leadership was interested in developing joint strategies for marketing and programming. This is included as a product development priority to follow.





Benchmarks

When considering additional comparable and competitive destinations that are not Pompano Beach's neighboring communities, several tourism destinations within the state of Florida were studied. When determining which locations to study, several factors came into consideration with the primary locational item being an anchor city similar to Fort Lauderdale. Using the gulf coast of Florida as a comparable and competitive market, the Tampa, Clearwater and Sarasota areas were studied. Those cities included:

- **St. Petersburg**
- **Dunedin**
- **Palm Harbor**
- **Indian Shores**

A city like St. Petersburg has leaned into the arts and cultural product and has become known as a cultural destination with assets like the Salvador Dali Museum, Chihuly Collection at The Morean Arts Center, The James Museum of Western & Wildlife Art and The Museum of Fine Art. Additionally, the performing arts and entertainment venues include The Capitol Theater, Ruth Eckerd Hall and The Palladium Theater. These aspects of arts and culture with dedicated venues and programming combined with the waterfront location on Tampa Bay make it an ideal choice for visitors looking for beautiful views and things to do.

Similarly, the City of Dunedin, which is about 25 minutes from Tampa and borders Clearwater to the north has built up its downtown/main street area with a density of restaurants, bars and shops that leads directly to the waterfront location on the St. Joseph's sound. The City also has Honeymoon Island State Park in its borders which is One of Florida's top ranked state parks, with more than four miles of beach to explore along with a three-mile trail through one of the last remaining virgin slash pine forests. On the built environment side, Dunedin is home to the Toronto Blue Jays spring training facility and is only 10 minutes from the Philadelphia Phillies spring training facility. This combination of natural resource and critical mass of things to do have caused the destination's visibility to dramatically increase in the last 10 years.

Each of these competitive and comparable destinations have similar beach and water amenities which positions them to drive demand, however, it is the unique features of the built environment that set them apart and drive increased visitation to the localities. This reinforces the importance collaboration with the cultural community and supporting development that has been identified in the planning process.





SWOT Analysis

SWOT analysis (or SWOT matrix) is a strategic planning and strategic management technique used to help a person or organization identify strengths, weaknesses, opportunities, and threats related to business competition or project planning.

From this market study, and with feedback from stakeholders engaged in this process, a SWOT was developed. The key strengths for Pompano Beach tie to the natural resources of the beach, ocean and waterfront nature of the City, additionally its positioning and accessibility from Fort Lauderdale add significant value. In addition, through the development of this plan, the linkage with the cultural arts master plan is a strength that should be leveraged in implementation.

For weaknesses and threats, the perception of safety was continually raised as an area that needed to be addressed. And while there is an existing brand, the need to communicate that brand promise and extend the brand throughout the community with wayfinding signage specifically for visitors is an opportunity to expand on in implementation.

Strengths

- Beaches
- Location/access
- Air service access
- Outdoor recreation (including golf)
- Parks and outdoor access
- Cultural offerings
- Weather
- Pier investment
- Niche market assets
- Safe visitor areas vs. perception of overall safety
- Casino
- General aviation airport

Weaknesses

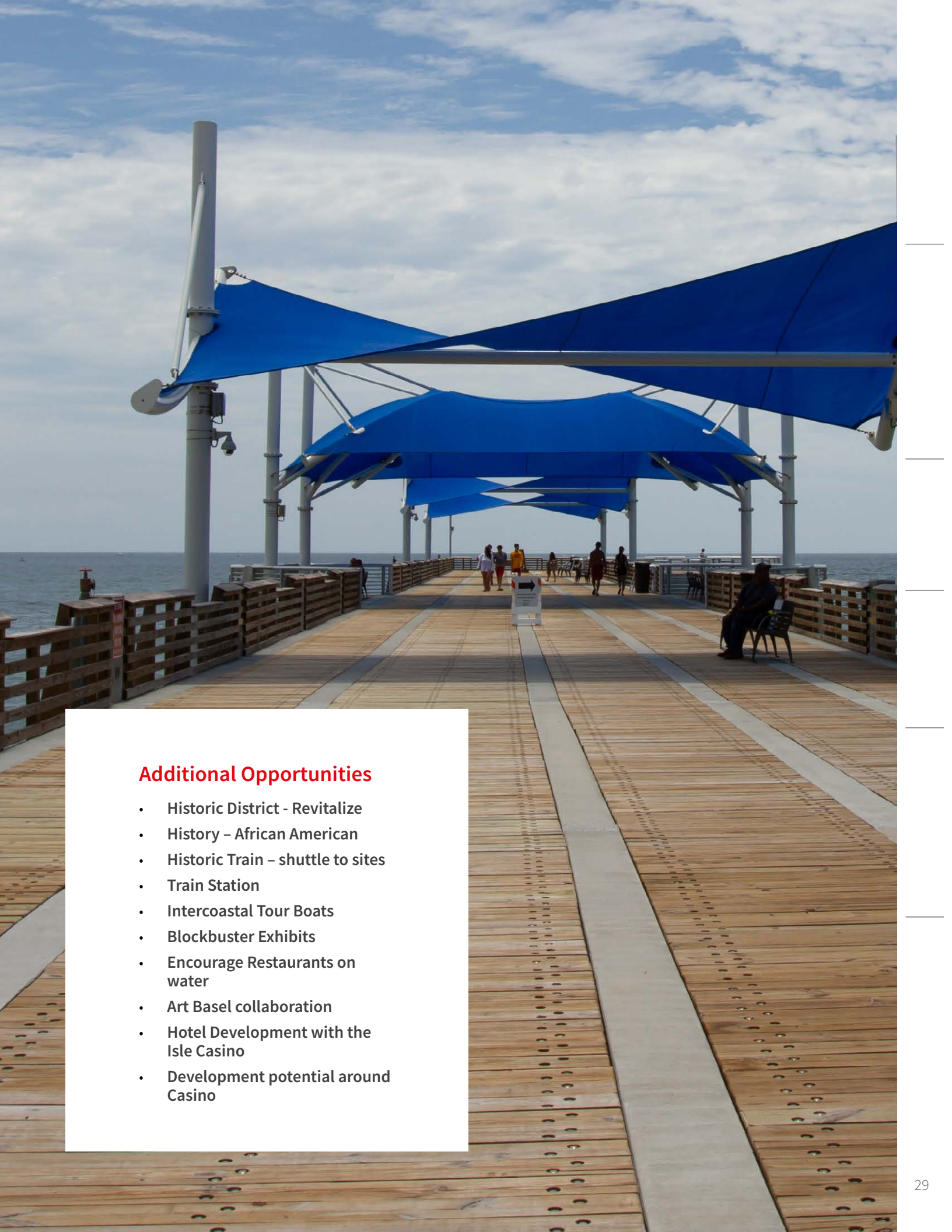
- Limited full-service hotel stock
- Lack of awareness and brand
- Overshadowed by Fort Lauderdale
- Tourism budget
- Marketing resources
- Critical mass within visitor district
- Lack of meeting space
- Lack of direct sales effort
- Tournament sports venue inventory
- Direct and focused tourism path and responsibility
- Perception of overall safety
- Traffic patterns & public safety (infrastructure, logistics)

Opportunities

- Variety in lodging options (traditional & alternative)
- Drive in market potential
- Shoulder and off-season target markets
- Leverage neighboring communities
- Leverage FLL
- Existing geographic market awareness
- Leverage cultural arts including signature events
- Entertainment venue
- Leverage enthusiast market
- New asset developments
- Old Town Untapped
- Innovation District
- Botanical Garden future product

Threats

- Off-season weather & storms
- Health crisis / plan to diversify tourism economy
- Community perceived value on tourism economy
- Alternative accommodations inventory management
- Lack of resources
- Visitor profile “slippage”



Additional Opportunities

- Historic District - Revitalize
- History – African American
- Historic Train – shuttle to sites
- Train Station
- Intercoastal Tour Boats
- Blockbuster Exhibits
- Encourage Restaurants on water
- Art Basel collaboration
- Hotel Development with the Isle Casino
- Development potential around Casino

Tourism strategic plan priorities





Priority 1: Maintain Investment in the Beach and Natural Assets that Drive Demand

Research Based Strategic Direction

Based on the existing demand for the beaches and the current visitor segments that have sought out Pompano Beach, the Tourism Committee should continue to advocate for the continued investment in those assets. The purpose of this priority is to preserve and enhance key natural resources as visitor and residential assets including the beaches, outdoor recreation (paths, trails, bikeways), water and paddle sports, fishing, piers, lagoons and parks and the amenities available at these points of interest.

Recommendation

Continue to invest and advocate for future investment in the beach as the primary asset as well as additional natural resources i.e. parks, trails, piers, etc. as important assets to enhance experience and services to drive increased visitors.

The beach is the primary reason people are discovering Pompano Beach and should remain the primary focus. In addition to beach the natural resources that make Pompano Beach great should continue to be elevated.

In addition to the natural resources, Pompano Beach also has new and improved assets for outdoor experiences. This should also include increased activation of the Amphitheater. With the investments recently made, the Tourism division should play a role in programming and development in conjunction with City Administration and the venue operator.

Additionally, the City of Pompano Beach, through its Tourism division as well as through partnerships with the CRA and other economic development aspects, should consider researching and investing in additional services to add value to the beach experience.

COVID-19 Implications

As mentioned earlier in this report, COVID-19 initially negatively impacted travel to the destination, but quickly saw a rebound due to the destination's beach access, access to the drive market and overall quality of life. Many aspects of COVID-19's revenge travel will continue in 2022 and even into 2023, however the potential impact of travel restrictions lifting and international travel returning to normal may mean that the leisure guests that ended up in Pompano Beach will have new and additional options for their vacation travel in 2023 and beyond. The City of Pompano Beach should take the time to invest in new product, see following priority, in the next 24 months as less long-term travel occurs and shorter, typical vacation trips return to normal. Pompano Beach will be competing for leisure vacation travel beyond its in-state competitors when COVID-19's travel implications fade.



Milestone action steps

The TSP has many actions that will need to be taken in order to successfully implement each of the priority areas. The following are milestone actions to be achieved in the subsequent years for implementation to achieve its goals.



2022

- Advocate for the visitor experience through maintained investment
- Continue to work with the Parks department to support beach related projects based on visitor input to improve maintenance and service development as a partner from the City



2023

- Specifically plan for tourism/visitor-facing event programming at the Amphitheater for calendar year 2023 and beyond

Priority 2: Product Development

Research Based Strategic Direction

While the beach and the areas additional natural resources are the primary reason visitors have chosen Pompano Beach, the city would benefit from investment in tourism product. The purpose of this priority is to enhance and evolve product offerings in destination assets and amenities across the entirety of the City. Based on the neighboring communities and competitive destinations studied, investment in new product will be needed to compete for leisure travel as well as capture a fair share of business and group travel to Pompano Beach. **Reference Demand Driver Score Card results in appendix.**

Recommendation

The recommendations for product development tie to several areas. The first recommendation and overarching strategy is to implement Demand Driver Score Card to proactively solicit desired investment in visitor-facing products.

The second is to work with the development community to create space for a full service upper, upscale and potentially luxury hotel brand. A feasibility study should be conducted for a full service hotel with 200+ rooms, meeting space and upscale amenities. The study should also consider the revised tourism strategy to attract new market segments .

The third is to directly link the existing cultural amenities with programming for visitors. The connection to the arts and cultural community and the existing assets should be strengthened and invested in from a programming perspective to drive visitor traffic and spending into these culture assets. This also includes live music and the activation of the amphitheater.

The fourth area of focus for product development is brand and wayfinding signage. A comprehensive signage program that envelops the destination and its key points of interest goes a long way in distinguishing one community from another and adds value to the attractiveness of a place. By comparison, Pompano Beach does not have this today and the Tourism division should be actively involved in a broader signage plan with City leadership.

Additional product focus should be given to increasing retail and waterfront restaurants as well as family-friendly attractions, as the current family market is for younger families. There is a gap in product for families with teenagers and college-age children. Future meeting space should also be a consideration as Pompano Beach does not have stand-alone meeting space for large group gatherings.

Additionally, as mentioned above in the existing assets and demand drivers priority, consideration should also be given here for programming at the Amphitheater. Today, the concerts and programming are geared toward a residential base, but programming should be invested in with the operator to bring in larger acts to attract visitors from beyond the region into Pompano Beach and cause an overnight stay.

COVID-19 Implications

The pandemic has made the pace of construction projects slow due to supply chain and overall uncertainty in decision-making, however, at the time of this report, the pandemic's effects are slowly lifting. The immediate future funding mechanisms through federal monies in the American Rescue Plan Act could have a significant impact on Pompano Beach.



Milestone action steps

The TSP has many actions that will need to be taken in order to successfully implement each of the priority areas. The following are milestone actions to be achieved in the subsequent years for implementation to achieve its goals.

2022

- Work with City department leads on areas of focus i.e. economic development, parks, culture etc.
- Advocate for development of full-service hotel inventory and potential public-private partnership funding models
- Work with cultural department on itineraries for culturally inclined target markets
- Support the signage and brand package currently in development with partner departments of City leadership

2023

- Work with economic development to attract retail to Pompano

2024

- Begin to explore and advocate for built space for new meetings and conventions to be housed in Pompano either under one roof in hotel or otherwise

Priority 3: Direct Marketing

Research Based Strategic Direction

The aspects of tourism marketing that the Pompano Beach Tourism division, and this plan, should be focused on tie to those markets that can be influenced by the division's efforts. The existing county-wide convention and visitors bureau has budget and dedicated team focused on increasing the visibility of the greater Fort Lauderdale area through several different programs. The CVBs budget and resources are focused on the larger lift enabling the Pompano Beach effort can shift to a narrower focus.

Recommendation

The recommendation here is to dedicate the majority of all marketing spend on resources to support direct marketing efforts. This direct marketing effort will keep the plan's efforts on target by refining target markets that are a fit for Pompano Beach and going to them directly through email and social media targeted marketing with calls to action and offers for overnight stays to increase conversion to Pompano Beach. Currently, the Tourism Division does this to some degree, however, the recommendation of this plan is to shift the focus to this effort entirely.

This recommendation means that appropriate budget dollars for marketing should be tied to direct marketing campaigns executed by the Tourism division and allow the general awareness marketing efforts to raise awareness of the overall area to the CVB.

The Tourism Division should acquire databases of visitors that fit the Pompano Beach target markets and segmentation over the course of this plan and develop an annual marketing calendar for direct email initiatives supported by targeted social campaigns and Google ads.

Additionally, the tourism website should be retooled to support this direct marketing approach. This will require updates for optimizing SEO, supporting transactions, overall navigation and broader strategy to support other aspects of the plan i.e., branded wayfinding signage and overall look and feel.

COVID-19 Implications

Aspects of travel that should maintain a presence in the next 18-24 months with marketing efforts should continue to reinforce cleanliness, outdoor amenities and access to outdoor recreation.



Milestone action steps

The TSP has many actions that will need to be taken in order to successfully implement each of the priority areas. The following are milestone actions to be achieved in the subsequent years for implementation to achieve its goals.

2022

- Based on plan recommendations, isolate target markets into 3-6 personas and style all advertising and marketing content to each
- Acquire visitor databases that fit Pompano Beach target markets
- Build and manage databases organically in Excel and existing Mail chimp system to segment out target marketing to personas identified
- Test initial content by persona and target market

2023

- Build CRM system to input visitor database into
- Grow database organically based on “opt-in” subscribers
- Develop marketing calendar for direct email initiatives
- Leverage owned social channels and Google ads to respective target audiences with regularity and supplement database

2024

- Build annual marketing campaigns for post COVID experiences
- Work with partners and new products to integrate new offers into annual marketing plans



Priority 4: Event Strategy – Signature Events Development

Research Based Strategic Direction

As mentioned in the Market Study section, an overarching strategy for tourism events is critical for the future of the destination and is a key factor for raising overall awareness of Pompano Beach. It was determined the existing event landscape is limited in the number of type of events that impact the tourism and hospitality sector today in Pompano. The purpose of this priority is to enhance existing events or curate new events that achieve a tourism status by scaling the events to reach target audiences. **Reference Event Matrix in appendix.**

Recommendation

The recommendation for event strategy is to further customize and implement the event matrix in three practical applications. The first application of the event matrix is as a pre-event scoring mechanism to determine tourism-related event permitting and sponsorship funding from the city. The second application is as a post-event scoring to determine the success of the event against the matrix's criteria to benefit the city. The third application is as a tool to work with organizers to recruit new events and curate events that are a fit for Pompano Beach.

This also includes a collaborative effort with the Cultural Arts Master Plan to develop new signature events.

COVID-19 Implications

While restrictions on gathering sizes may change and flex over the next six to 12 months, this event strategy should persist as a vision for the future.





Milestone action steps

The TSP has many actions that will need to be taken in order to successfully implement each of the priority areas. The following are milestone actions to be achieved in the subsequent years for implementation to achieve its goals.

2022

- Adopt Event Matrix as screening tool for City and Department folded into existing event application process
- Apply Matrix to events that are seeking support for 2022 and 2023
- Create event organizer sessions for education on event matrix process

2023

- Confirm existence or development of an event based seed funding “budget”
- Identify event organizers (if applicable) with individual events that could fit into the matrix for future seed funding
- Align event considerations with cultural plan – develop approach to finalizing signature event direction

2024

- Develop annual goals and marketing strategy to support newly funded events
- Identify event organizers with individual events that could fit into the matrix for future seed funding
- Finalize business plan with cultural partners for new signature event

2025

- Seed fund events annually with sunset on funding of three years per event to have a lasting impact
- Launch first signature event in collaboration with Cultural partners

Priority 5: Transportation & Connectivity

Research Based Strategic Direction

The existing visitor infrastructure, assets and amenities are located on the east of Pompano and tied to the beach as the anchor asset for visitors. As the destination develops and visitor interest is expanded off beach, the need for transportation solutions and increased connectivity between assets will become important. The purpose of this priority is to improve visitor connectivity and experience, improve ability to move between assets, specifically off beach for site connectivity with arts and cultural assets and improve overall pedestrian experience and walkability.

Recommendation

The recommendation for the transportation strategy is to advocate for the expansion and further enhance the existing circuit transportation product that is already in place. It is recommended that a P3 model for a multi-phased mobility and connectivity “route” is developed by the Tourism division in conjunction with the Tourism Committee, partners and City leadership. The points of interest should include at a minimum:

Phase One – downtown amenities, hotels, beaches, light house, visitor center

Phase Two & Phase Three – Arts and cultural sites (Bailey, Ali, Pompano Beach Cultural Center, amphitheater)

It is recommended that a similar model to the water taxi be examined, and ticket prices be set to encourage ridership while still achieving an affordable price point.

COVID-19 Implications

Pedestrian accessibility and the independence of the individual traveler will continue to be important in a post-COVID world and transportation and connectivity solutions should be designed with small group and individual travelers in mind.



Milestone action steps

The TSP has many actions that will need to be taken in order to successfully implement each of the priority areas. The following are milestone actions to be achieved in the subsequent years for implementation to achieve its goals.

2022

- Advocate alignment with Commission agenda
- Develop price model to support tourist stop connectivity
- Conduct in-house feasibility with City leadership and business plan for Water Taxi service.

2023

- Stay engaged to advocate for expansion east to west in multiple phases
- Partner with transportation leadership to develop reporting on overall ridership and engagement in transportation and customer satisfaction with new services

Priority 6: **Neighborhood Preservation & Cultural Tourism Development**

Research Based Strategic Direction

Pompano Beach has a rich community and distinct neighborhoods that should be preserved and invested in, with those communities realizing their share of the tourism economy. The purpose of this priority is to enhance existing neighborhoods, extend community pride and inspire visitors to experience the unique off-beach neighborhoods through a connection to the cultural tourism assets.

Recommendation

The recommendation for neighborhood preservation & cultural tourism development is to develop a program in conjunction with the Cultural Affairs Department to identify neighborhoods and individual neighborhood assets within the Cultural Affairs portfolio to brand the community and provide visitors with a neighborhood driven experience.

For this priority to be successful a strategy must be developed to work with the community through partner groups to prepare the locality to be visitor ready. Identifying points of interest on the transportation circuit and inspiring travel off-beach. Additionally, programming needs to be developed collaboratively with the Cultural Affairs department as well as City leadership to activate entertainment venues and program live music, events, etc. into these neighborhoods to initiate visitation.

COVID-19 Implications

Preparing communities to welcome visitors is a multi-step process, however with a pandemic still at large, community vaccination rates should be considered to mitigate health risks and local community spread should be monitored before promoting new programs to protect the health and safety of the local community members as well as the visitors.



Milestone action steps

The TSP has many actions that will need to be taken in order to successfully implement each of the priority areas. The following are milestone actions to be achieved in the subsequent years for implementation to achieve its goals.

2022

- Develop neighborhood communication program to drive visitors into off beach experiences (Beach, downtown, Pompano City Shopping Area)

2023

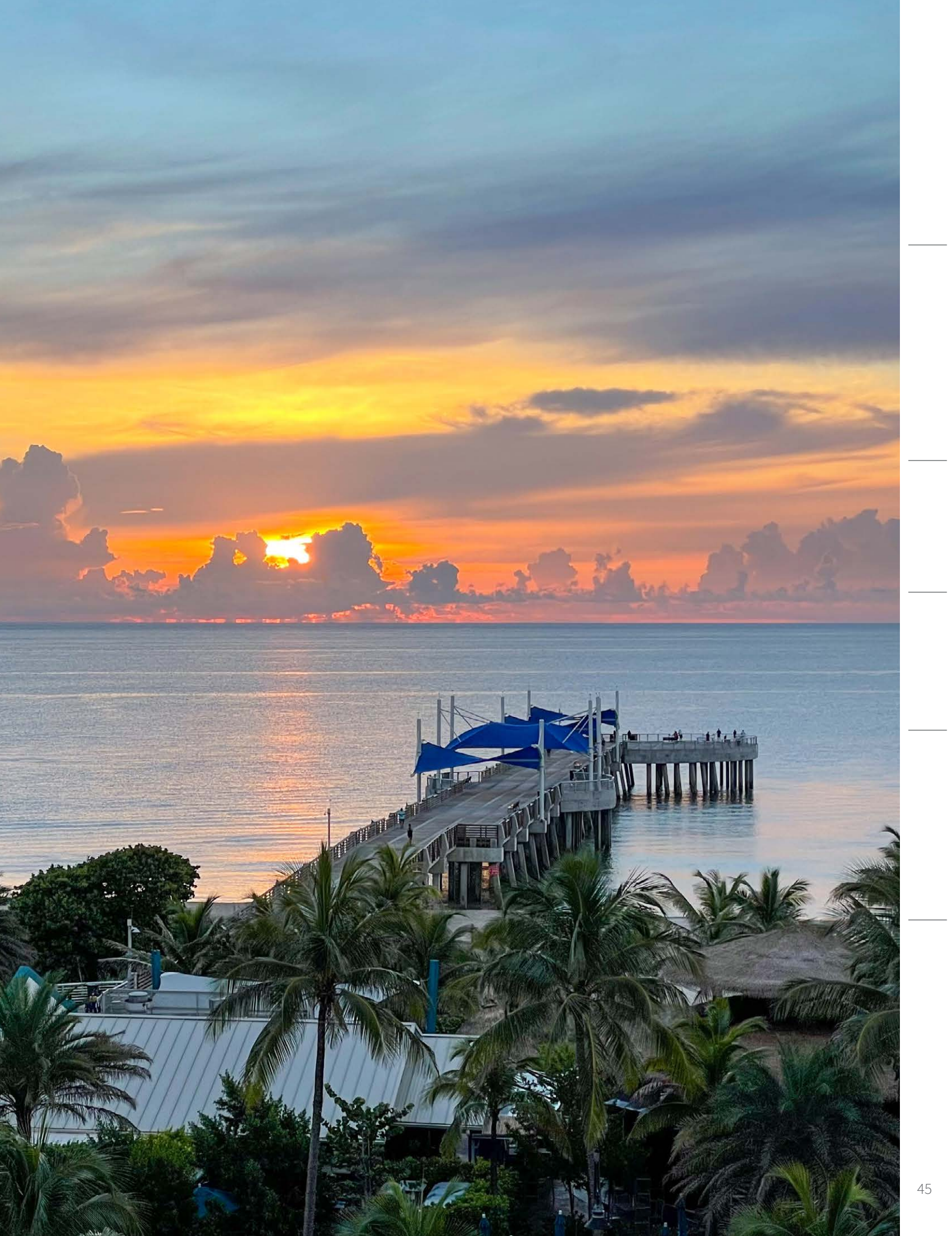
- Continue to work with the City on the naming of districts to plan for tourism growth in the longer-term plan
- Engage in development strategies including confirming short-, medium- and long-term development plans

2024

- Develop new experiences to support travel into new districts (North West Pompano, golf course, inlet, fishing fleet area, harbor, Palm Air, etc.)

Organizational resources

As a division of city government, the Pompano Beach Tourism Strategic Plan's implementation will rest primarily on the shoulders of the Tourism division. With partners both inside city government as well as external stakeholders and partner organizations, the TSP will be an effort in partnership however the ability to move implementation forward will come from the Tourism division. The Tourism division will need the resources to support the broad-based implementation of the plan and the ongoing to raise awareness and support product development. In the immediate term a portion of available American Rescue Plan Act (ARPA) funds that the City receives should consider the Tourism effort to supplement and support implementation of this plan and the organizational needs.



Current Structure

The Tourism division is housed inside of the City of Pompano Beach and is a city-led effort separate and in addition to the countywide effort at the Greater Fort Lauderdale CVB which is a destination marketing organization inside of Broward County government. The division is run by a departmental employee reporting into the City Administration and supported by “sister” departments i.e., Parks and Recreation, Marketing and Communications, Economic Development and Public Works. The division currently has one FTE supporting the tourism initiatives.

Additionally, the division has an advisory committee which developed the first strategic plan in 2011. That committee is still intact and has been an active sounding board in the development of this plan. This committee will be critical in overseeing implementation of this plan by continuing to focus on the Plan’s priorities, being a sounding board and advocacy body for the Tourism division while bringing partners to the table for execution as well as lending their individual expertise.

The Tourism division’s budget for FY2018/2019, pre-COVID, was roughly \$350,000 including personnel and sales and marketing efforts. The Fy18/19 budget includes items such as direct marketing efforts included in the Advertising section and travel included in the Marketing Special Events which consists of Trade Shows, Sales Missions, Consumer Shows, some with VISIT FLORIDA, Greater FT. Lauderdale CVB and some independent.



- 63%** Personal Services
- 7%** Admin
- 0%** Travel
- 3%** Utilities
- 14%** Advertising
- 7%** Marketing Special Events
- 0%** Office Supplies
- 1%** Special Supplies
- 4%** Publications
- 0%** Other



- 58%** Personal Services
- 6%** Admin
- 1%** Travel
- 2%** Utilities
- 20%** Direct Marketing
- 7%** Advertising
- 3%** Marketing Special Events
- 0%** Office Supplies
- 1%** Special Supplies
- 3%** Publications
- 0%** Other

Recommended Structure

The TSP's implementation will require dedicated resources and some shift in existing resources to ensure the division has the bandwidth to implement. The Tourism division's structure is sound and should remain intact within City government for the duration of this plan.

The Tourism division has an allocation for Travel as well as travel that occurs within Marketing & Special Events. It is recommended that any travel related to industry tradeshows be itemized within the "Travel" category as the TSP now has a focus on special events and that budget category will have new efforts.

It is recommended that resources be re-allocated to the direct marketing efforts. This will include budget for database acquisition, creative, collateral development, and staff time for execution. This could be done internally with a part-time hire, contractor, or outside firm. It is recommended that this position and resource be confirmed in the FY22/23 budget and planning process. It is also recommended that the budget breakdown is more specific where appropriate.

The advisory Committee, which has been integral, to the support of the tourism initiatives in the last 10 years should be further cemented as an oversight body tasked with this Plan's implementation and supporting the achievement of annual quantitative and qualitative goals.

The above chart proposes slight shifts in resources to the existing budget categories. While this does not appear to substantially shift dollars it does assume, based on the Plan's recommendations, that essentially all marketing funds are dedicated to the direct marketing efforts and that only a minimal dollar amount, if any, is set aside for traditional advertising. In the prior version, only 21% of the total budget was going to marketing and advertising. In the proposed allocation just over 30% of the total budget is recommended for marketing and advertising, with significant emphasis on the direct marketing effort, which would be entirely new. This budget also includes engaging contractors to support marketing and overall advocacy and product development efforts.

Additionally, it is recommended that the Tourism Division budget be increased to support new efforts over time. It is recommended that the budget increase by at least 30% to support the Plan's implementation.

Annual Business Plan

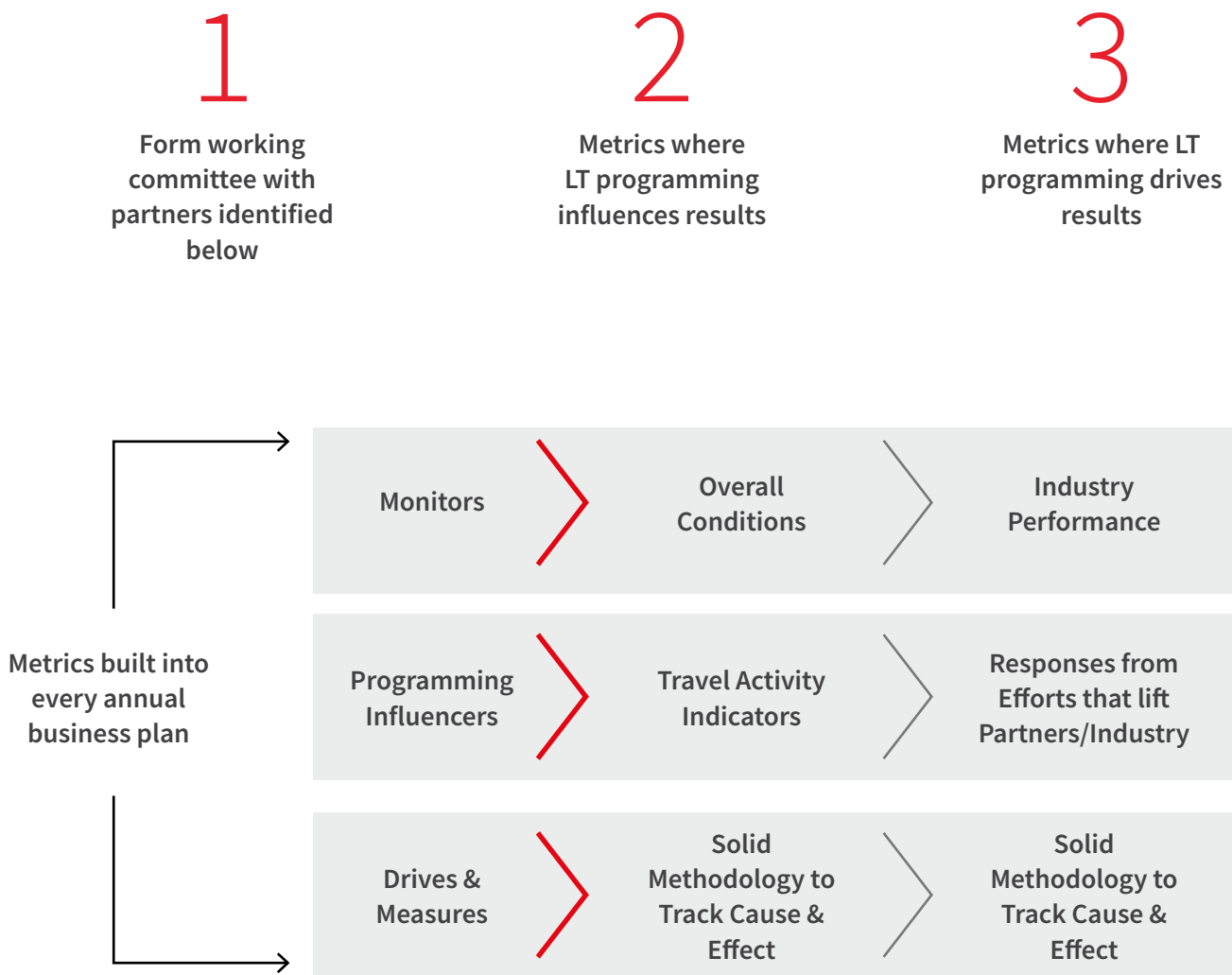
To support the budget request as well as communicate the Plan's next steps with internal and external stakeholders, it is recommended that an annual business plan be developed in conjunction with the Tourism Committee. The annual business plan should mirror the TSP with all of the elements and priorities with great detail for implementation. The annual business plan is more than a marketing plan, though it should include marketing strategies and tactics. It is recommended that the annual business plan be approved by the Tourism Committee and include the metrics outlined below associated with the industry and the TSP's success.



Metrics

The importance of metrics and measurement cannot be understated. It is recommended that this plan be measured by specific metrics for the industry’s impact in Pompano Beach. As a division of City government and not as the CVB, the division has less resources and less access to big data. It will be important that the City continue to work closely with the CVB to share data and get access to research from the CVB to impact reporting back in Pompano Beach.

It is recommended that the Tourism division break measurement and reporting out into three areas for the local industry:



Samples of these metrics in each category are below:

Monitor

- Visitation Stats – frequency annual
- Visitor Impact – frequency annual
- Tax Collection/Revenue – frequency annual
- Lodging Performance – frequency monthly

Program & Influence

- Web activity
- Social media engagement
- Travel media coverage
- Point of origin awareness

Drives

- Direct marketing campaign results
 - Campaign engagement
 - Visitor actions taken
 - Packages sold
 - Room nights booked
- Referrals to partners
- Transaction trends for partner programs

Beyond the marketing execution success, it is recommended that this plan's efforts are measured and reported on.

TSP Specific Reporting

- Priority milestones achieved – each to be detailed in an annual action plan
- Event organizers engaged
- Product gaps filled
- Asset owner/managers engaged annually
- Partner and stakeholder awareness engaged – annual stakeholder survey
- New Programs and Recommendations Fulfilled (or status of)
- Trackable overnight stay generation
- Sports tournaments secured

These tiers of reporting on metrics will be easier to digest for stakeholders as well as cleaner for the division to message out its new expanded role in the community related to the implementation of the TSP.





City & Community Synergies

It is also critically important for the division to stay engaged and get further embedded in the community for implementation to be a success.

One area of this, for example, is the Cultural Affairs Department and the plan that is currently underway. There are many aspects of overlap and synergies between tourism and culture in Pompano Beach. It is recommended that the cultural items from this plan be outlined in an annual business plan and those milestones be targeted goals of each year's annual business plan. It is further recommended that the tourism division and the Cultural Affairs department meet monthly on annual goals, strategy and programming execution. In addition, the team should develop shared metrics. An example is the impact of shared activity in driving event overnight attendance.

A second example of this is the City Administration and its overall event strategy for community, culture and tourism related events. With potential funds for event investment residing in the administrative offices, the Tourism division should work closely with City administration on the adoption and implementation of the event matrix into the existing event approval process. The Tourism division should cultivate relationships with targeted event organizers and work their concepts through the matrix in advance. It is recommended that any events identified for investment be workshopped with City Administration so the organizer can develop the event to suit the needs of Pompano Beach.

Additionally, sports tourism is critically important and a continued emphasis on supporting Parks and Recreation's efforts to improve the facilities for quality and quantity will ultimately convert incremental sports business into Pompano Beach. The tourism department should develop a plan to secure new sports tournament in collaboration with the Parks and Recreation department.

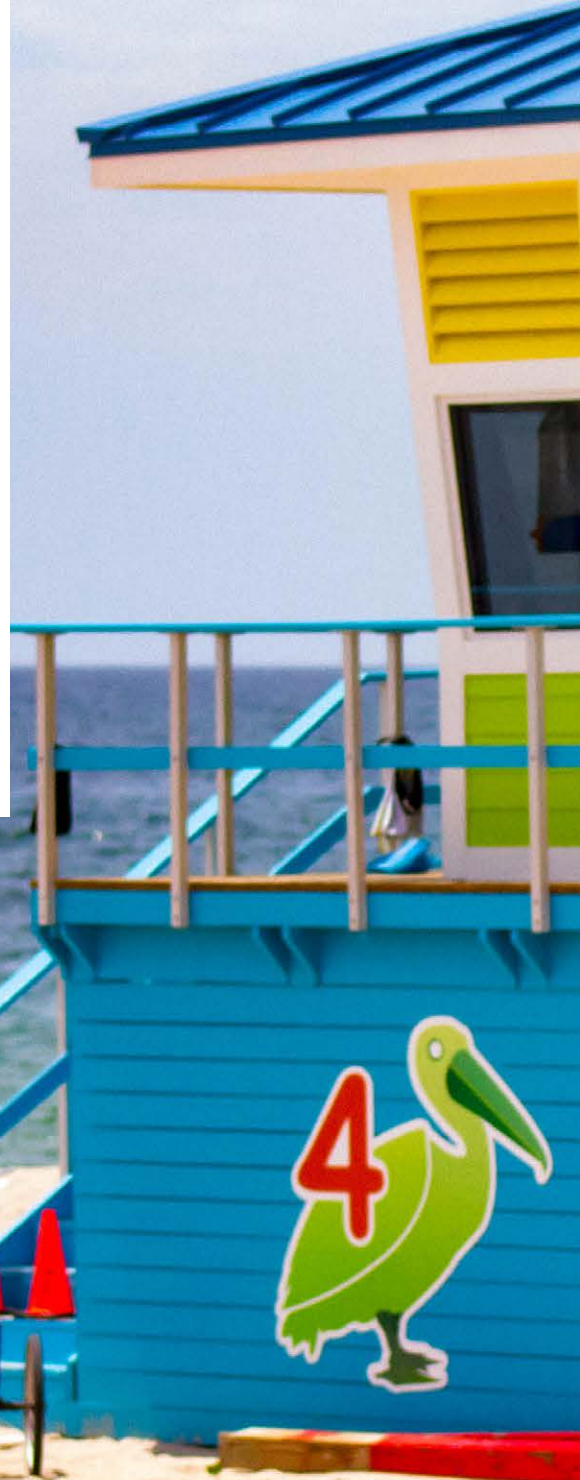
Lastly, the transportation priority and subsequent recommendations are tied directly to an overall item that is currently on the City Commission agenda. The Tourism division should be part of those discussions for future route planning to ensure that the tourism points of interest and tourism industry stakeholders are represented as the transportation plans are refined and finalized.

Conclusion

This TSP process reaffirmed the City's interest in furthering the opportunities for the tourism industry to be successful and drive increased returns. This process enabled both industry and community feedback, market research and competitive positioning research to inform the recommendations. Over 80 stakeholders participated in the TSP's development including the Tourism Committee which met monthly throughout the engagement.

With this interest and participation from committed stakeholders and City leadership, the TSP and its seven priority areas were developed and vetted thoroughly. These priorities and their subsequent recommendations will serve as a roadmap for the City's tourism efforts for the next 10 years.

Building off of the strong foundation from the 2011 plan, the City is positioned well to steward the growth of tourism for the next 10 years with the new Tourism Strategic Plan and commitment from vested stakeholders along the way.







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