Developing Coastal Tourism as an Economic Driver:
Strategies & Recommendations for Brazoria, Chambers, Galveston and Matagorda Counties, Texas
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International Economic Development Council

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PROJECT OVERVIEW

The International Economic Development Council (IEDC) was retained by the U.S. Economic Development Administration (EDA) (a bureau within the U.S. Department of Commerce) to provide technical assistance in economic development to Texas and Louisiana communities impacted by Hurricane Ike.

IEDC, with input from the Gulf Coast Economic Development District, identified a four-county region in southeast Texas (part of the greater Houston-Galveston region) as an area in need of this technical assistance, specifically regarding its coastal tourism industry:

» Brazoria County
» Chambers County
» Galveston County
» Matagorda County

An IEDC team of experts began assisting the region by conducting a four-day visit to the area. During the visit, which took place in May of 2011, the team visited all four counties on a two-day tour to evaluate the region’s many tourism assets; met with over 2 dozen stakeholders throughout the four counties, and held a half-day workshop to lead regional stakeholders through the process of prioritizing their next steps for galvanizing a regional effort around the development of a regional coastal tourism strategy.

This report is the culmination of the IEDC team’s findings. It provides an overview of the key opportunities and challenges, and offers key action steps the community should consider to further develop the regional coastal tourism industry. IEDC worked in partnership with the Houston-Galveston Area Council (H-GAC) for this project.

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OPPORTUNITIES

The four-county region has an abundance of recreational tourism assets that if developed and aligned could join the region together as a premier tourism destination.

This section of the report tries to define the primary regional opportunities that offer some prospect of improving the overall outlook of the coastal tourism industry in Brazoria, Chambers, Galveston and Matagorda Counties.

Opportunity // Growth of the Houston Metropolitan Region

The region’s population is expected to grow to roughly the size of the current (2010 Census data) population of Los Angeles County by 2035 – 9,000,000+. This increase in population implies that it’s likely many more residents in the region will seek local recreational and tourism opportunities, especially along the beaches of the Gulf of Mexico and the shorelines and open water of Galveston Bay. The four-county coastal region has the potential to capture this increased demand.

Growth of the Four-County Region

According to population projections from the Houston-Galveston Area Council (H-GAC)\(^2\), there’s an expected addition of 315,000+ residents in the four-county region by 2035. The majority of this projected population growth is expected to concentrate in Brazoria County (as the closest suburban area to Houston of the four-county region) and Galveston County – though Chambers County is expected to have the fastest population growth rate of the four counties at 53.4%.

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1 The population of Los Angeles County is 9,818,605 (US Census 2010) while the projected population of the Houston-Galveston region (as defined by the Houston-Galveston Area Council’s (H-GAC) 13-county scope) is projected to be 9,128,171 by 2035 (or 93% of Los Angeles County’s 2010 population). Houston-Galveston Area Council (H-GAC), Preliminary Regional Demographic Forecast data, accessed at: http://www.h-gac.com/community/socioeconomic/forecasts/2040/2040.aspx.

Changes to the demographic composition of Texas (as demonstrated in the preliminary figures from the 2010 Census) will put pressure on Texas tourism industry to change how the state looks at its visitor markets both now and in the future. In particular, the rapid and sizeable growth of the Hispanic population (see Figure B below) in Texas demands that the four counties begin looking to accommodate this emerging market in future tourism development. In effect, the four counties must begin to ask themselves questions such as: “What does the four-county region have that will appeal to the Hispanic population demographic?” and “What do the four counties have that appeals to the aging Caucasian Baby Boomer demographic?”

**Growth of Hispanic Population**

The estimated Hispanic population growth rate in the greater Houston region from 2010 to 2035 (83.8%) is expected to **almost double the growth rates of any other demographic group** in the Houston-Galveston region. Specifically, the Hispanic population growth rate in the region in this timeframe is estimated to be:

- 1.9 times the Black or African-American population growth rate \((83.8\% \text{ vs. } 44.9\%)\)
- 2.6 times the White or Caucasian population growth rate \((83.8\% \text{ vs. } 32.3\%)\)
- 1.9 times the population growth rate of all other demographic groups \((83.8\% \text{ vs. } 44.5\%)\)

This estimate implies that the population growth in the absolute number of additional Hispanic population in the region \((+1,821,956)\) during this timeframe is expected to be approximately:

- 2.4 times the size of the additional White or Caucasian population \((+1,821,956 \text{ vs. } +754,672)\)
- 4.1 times the size of the additional Black or African American population \((+1,821,956 \text{ vs. } +448,649)\)
- 10.0 times the size of the additional population of other demographic groups \((+1,821,956 \text{ vs. } +182,653)\)

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While predicting the **exact** impact on tourism of these different levels of growth among diverse populations and demographics isn’t necessarily possible, it certainly still worth considering future research on tourist profiles regarding the distinct tourism and spending habits of these demographic groups as they continue to grow in the region. Consideration of shifting demographics and Latino heritage is currently being explored at the national level, with potential additions to the national park system and enhancement of current park offerings (please reference recent Washington Post 2011 article).

**Figure B. Expected Population Growth in the Houston-Galveston Region by Race**

![Figure B](http://www.h-gac.com/community/socioeconomic/forecasts/2040/2040.aspx)

**Figure C. Expected Population Growth in the Houston-Galveston Region by Race**

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The broad term “coastal tourism” implies several different types of tourism niches — namely nature tourism, recreational tourism and even some forms of historical and heritage tourism.

The four-county region is ripe with nature-tourism opportunities with birding as the most cited shared asset. Among others, there are a couple of nationally prominent areas for birdwatchers — Houston Audubon Society’s Louis Smith Bird Sanctuary on High Island and Bolivar Flats near Port Bolivar. These areas offer migrating birds an initial place to descend and rest when they reach North America from their native homes in Central and South America. The four-counties and the greater Houston-Galveston region is also home to tens of thousands of native shore birds.

Other coastal tourism opportunities include fishing, boating (both powered and non-powered), hiking, walking, bicycling, nature-oriented festivals, agri-tourism, camping etc. There are also other nature-tourism opportunities within the four counties that are more disparate.

Understanding Tourism Assets to Inform Tourism Marketing

One regional stakeholder described Houston-Galveston area nature tourism assets as an “acquired taste” — meaning that while there are opportunities for leveraging these natural assets for tourism, they aren’t prototypical scenes of picturesque landscapes or breathtaking views from mountain tops that a more traditional tourist might immediately recognize as something they might be willing to spend time and money to see. In other words, as stated by one of the stakeholders in the region, the beauty of a salt marsh is akin to cilantro — you either like it or you hate it. With that said, acquired tastes are acquired for a reason, usually through direct or indirect marketing and promotion to make these tastes palatable and approachable to the average person / tourist.

The foundations for nature related tourism in the region certainly exist, whether in the form of universally appreciated views and recreation on the beautiful beaches of all four counties, or in the form of relatively untouched estuaries and wildlife preserves.

As discussed by many stakeholders in the final workshop of IEDC’s site visit to the region, it will likely be a necessary first step for the group to begin mapping the region’s nature tourism assets (among other tourism assets) to identify what opportunities currently exist to then begin developing an understanding of how the group might actually put some of these assets to work as part of a broader nature tourism package in the region. This will also likely need to incorporate other types of tourism assets in the region (whether historical, cultural, recreational, architectural, etc.). The asset mapping process should be defined, as much as possible, prior to the experience. A guide to this asset mapping process is included in the “Short-Term Strategies” section of this report.


There exists an underdeveloped and underexplored opportunity for the four counties to “brand” their agricultural and seafood products. There also exists a parallel opportunity to develop a cachet for farm-to-market dining experiences in the four-county region’s locally owned and operated restaurants.

In Galveston County, for example, there are several interesting nascent developments related to local foods and agricultural branding opportunities. In Galveston (city) there are several novel, trendy companies and stores (e.g. juice bars, oyster bars, cafes, etc.) that now complement some of the re-opened and reestablished coffee shops and boutique retail stores downtown. In Chambers County and on Bolivar Peninsula (Galveston County), there are fishing...
communities trying to develop opportunities to re-brand and market Galveston Bay Oysters. This is part of a broader local food movement — a higher paying market — in the region in which these ventures are exploring the potential to earn increased revenue from fewer or smaller harvests while coupling sustainability and the recovery process.6

Given the prominence of fishing and agricultural communities in all four counties, there’s a legitimate opportunity to convert a local foods movement into a functioning stream of tourism dollars and activities.

**OPPORTUNITY // HISTORICAL TOURISM**

There are several historical tourism niches on which the region could capitalize. These include: the region’s agricultural history, military history, and pirate and coastal history.

**Agricultural History**

In its background research prior to the site visit the IEDC Team’s learned of some of the key components of the region’s agricultural history. These interesting agricultural historical elements were reiterated by a few stakeholders during the visit. One example mentioned was Bolivar Peninsula (Galveston County) which was once hailed as the “breadbasket” of Galveston and the “watermelon capital” of Texas.7 These built-in historical identities hold the potential to be somehow coupled with the region’s efforts to brand and develop its agriculture and local foods movements and help tie together the region’s agri-tourism and historical tourism efforts.

**Military History – Fort Travis**

Additionally, Bolivar Peninsula is home to Fort Travis, a fort that, by all appearances appeared to be in a state of stagnation or disrepair. It is not difficult to imagine this historic outpost, steeped in Texas history including Jane Long, the Mother of Texas who flew a petticoat flag and could load and fire a cannon — and its namesake being that of Alamo hero Colonel William B. Travis — as piece of a broader network of the four-county region’s historic tourism assets.

**Pirate History – Jean Laffite**

Moreover, the region’s historical identity also incorporates pirates that shaped the region’s past. The pirate Jean Laffite is rumored to have held parties on for his entire pirate crew from Galveston Island on Bolivar Peninsula. And at least one former pirate, Laffite’s cabin boy, Charles Cronea, made his home at Highland, where he is buried.

**Coastal History – Bolivar Lighthouse**

Another important man-made feature on Bolivar Peninsula is the Bolivar Lighthouse, which currently appeared to be in a state of disrepair. The lighthouse (an iconic symbol of the peninsula and the region’s coastal history) was erected in 1872 but retired in 1933 and is now privately owned (i.e. not open to visitors and potential tourists). The lighthouse even withstood the forces of a couple of the worst storms ever witnessed along the Texas Gulf Coast — the hurricanes of 1900 and 1915, and Hurricane Ike in 2008. It isn’t difficult to imagine something like the Bolivar Lighthouse as a gem in the coastal region’s tourism package in which its rich history of resilience in the face of hurricanes and disasters

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7 Bolivar Chamber of Commerce, accessed at: www.bolivarchamber.org/BolivarPeninsula.aspx
standing as a remarkable living monument and testament to the spirit of the region’s ability to bravely face disaster and continue to stand proudly thereafter.

**OPPORTUNITY // REGION’S CONNECTION TO UNIVERSITIES**

The four-county region’s connection to universities (e.g. National Recreation Area) needs to be leveraged and exploited to help with developing a respectable tourism product and to assist with defining the region, branding it, marketing it and identifying resources for infrastructure and way-finding. Early programs to work with ranchers and an agri-tourism program are scratching the surface. Another example of this type of university collaboration is the Bolivar Peninsula Habitat Development Site — 17-acre tract —developed by Texas A&M University and the US Army Corps of Engineers.6

**University Connections**

The regions’ connection to universities is evident. The University of Texas Medical Branch on Galveston Island is the county’s largest employer (12,000+ employees)7. Other institutions of higher learning in Galveston County include Galveston College (community college) and Texas A&M University at Galveston (a branch of Texas A&M University with approximately 1,850 students). The region is currently working with researchers at Rice University to look into the feasibility of getting a federal “National Recreation Area” designation (see below). Other examples of university collaborations in the region include a study by a researcher from Texas A&M University8 that evaluated the impacts of Hurricane Ike on coastal tourism in the region after having been severely damaged.

These university connections should be kept in mind as potential opportunities for collaboration throughout the process of developing a formal coastal tourism strategy (e.g. coastal tourism asset mapping, future feasibility studies, etc.). Specific groups to consider are:

- Department of Recreation, Parks and Tourism Sciences (at Texas A&M University)
- Texas AgriLIFE Extension Service — Nature Tourism (at Texas A&M University)
- National Extension Tourism (headquartered at Texas A&M University)
- Rice University
- University of Houston
- Art Institute of Houston

For a detailed list of relevant tourism-related university resources, programs, etc. in the Houston-Galveston region, please see Appendix C.

**University Collaborations: National Recreation Area (NRA) Concept**

Area nature tourism groups (e.g. Houston Wilderness, etc.) are collaborating with Rice University on a concept paper (currently unpublished) that examines the region’s potential to achieve federal designation as a National Recreation Area9. This type of collaboration is considerably valuable as the expertise of regional universities can enhance

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8 Bolivar Chamber of Commerce, accessed at [www.bolivarchamber.org/BolivarPeninsula.aspx](http://www.bolivarchamber.org/BolivarPeninsula.aspx)
10 Woosnam, Dr. Kyle M., Texas A&M University, Department of Recreation, Park & Tourism Sciences. (January 2010). 2009 Galveston County Visitor Study Results. College Station, TX.
11 For further information on the National Recreation (NRA) concept please see the “Long-Term Strategies” section of this report.
regional stakeholders’ knowledge of specific regional tourism industries and lend credibility to tourism opportunities through academic analyses and studies.

**OPPORTUNITY // STATE OR NATIONAL SCENIC BYWAY**

Once underway with a regional tourism development effort, a State or National Scenic Byway may be considered as a vehicle to create a common footprint and synergy among counties and communities. The process requires leadership and cooperation but once achieved and designated, this would provide the region with another set of marketing channels through the state and federal websites.

The Coastal Tourism Task Force should consider conducting more research on what exists in the region in terms of national scenic byways and the process to achieve this type of distinction for some of Texas and the regions roadways. Texas is one of only four states in the US (other than Hawaii, Nebraska and Rhode Island) that does not have a national scenic byway (i.e. no scenic byways that are part of the America’s Byways program).

This is significant in the fact that there could be dollars being left on the table so to speak, as installing interpretive signage and scenic pullovers to existing roads involves considerably fewer capital costs than new roads do. In other words, the attraction itself is already built (the roadways). They just have not, to date, been leveraged to attract additional tourism dollars.

Though the precise figure for the economic impact of a national scenic highway varies due to a number of factors (e.g. geographic location, how the impact is measured, length of the byway, the local tourism market area, mix of traffic / transit, quality and quantity of opportunities for visitor spending, etc.) there’s less debate that a scenic highway does in fact generate economic activity.

The National Scenic Byway Resource Center’s (NSBRC) Economic Development Research Group compiled 21 studies conducted to date on the economic impact of scenic byways by designation12. The review looked at each study and broadly focused on the economic impacts of scenic byways along with related economic impact studies regarding tourism, national parks and highways.

This review reports as fact that these studies demonstrate that scenic byways can and do have significant economic impacts on communities. They create employment and generate sales that reach millions of dollars on the higher end of the scale. Such impacts come in different shapes and sizes, but stem largely from a byway’s direct effect on visitor attraction and spending. Scenic byways can serve as engines for economic development and new business activities.

Some studies focused on assessing a road’s economic significance with others focusing on the incremental economic impact. For national scenic byways, economic significance is the proportion of a local economy that “directly or indirectly receives money as a result of all scenic byway travelers”13. By comparison, studies on the economic impact of a new scenic byway designation focus on the incremental increase in visitors and associated increased economic activity beyond that which occurred before the scenic route was officially designated.

Though summary statistics on the economic case for national scenic byway designation are diverse (likely resulting from inconsistent study methodologies employed to estimate per-trip spending for a scenic byway and road activity

12 Quantifying the Economic Impacts of Scenic Byway Designation, accessed at: www.seagrant.sunysb.edu/seawaytrail/tracking/BywayEconImpact.pdf
and impact measurement tools), virtually all studies point to the conclusion that national scenic byway designation does in fact improve the economic situation for the localities through which scenic byways run, and that the question is not if, but how much of an impact they create. Below are a few select figures that support this broad conclusion.

- 19 — 33 Jobs per $1,000,000 of Visitor Spending
- $74,000 — $1,450,000,000 in “Total” Business Sales due to Scenic Byway
- ROUGHLY 5¢ — 8¢ State and Local Tax Receipts per $1 Visitor Spending
- 3.4% — 20% Increase in Annual Traffic
- $65,000 Extra Visitor Spending with 1% Increase in Vehicle Miles Traveled
- $104 Visitor Group Spending per Trip
- $50 — $188 Visitor Group Spending per Day
- $32,500 Annual, Visitor Spending per mile

An appendix with more detailed information on what constitutes a national scenic byway and how this designation is achieved is included in Appendix D.

**OPPORTUNITY  // CRUISE TERMINALS**

**Galveston Cruise Terminal**

The Galveston Cruise Terminal is the primary cruise terminal in the region. The ships that sail out of the Port of Galveston include Carnival Cruise Line (Carnival Ecstasy and Carnival Conquest) and Royal Caribbean International (Voyager of the Seas). In addition to existing cruise lines upgrading to larger ships in 2011 and 2011, the Disney Magic will cruise out of Galveston starting in 2012. The Galveston Cruise terminal should continue to be leveraged to recruit growth in tourism and related industries.

**Bayport Cruise Terminal**

The Bayport Cruise Terminal is operated by the Port of Houston and located on the western shore of Galveston Bay. Drawing consistent cruise line business to the Bayport terminal, located nearly 20 miles inland from the Gulf of Mexico, has been an on-going challenge. The perceived challenge or shortcoming with the facility is that the facility requires added expense of time and fuel (or in other words money) to cruise ships that have other relatively nearby cruise terminals from which to choose (e.g. Galveston). The pros for the facility are that, for potential cruise passengers, it's conveniently located near two major airports, meaning reduced travel time to actually get to the Bayport Cruise Terminal.

While discussions with a number of cruise brands are ongoing, re-envisioning the Bayport terminal provides some interesting opportunities. While the IEDC Technical Assistance team did not have the opportunity to tour the facilities, it is clear that the expanse may also lend itself to a convention center / arena or event center with either an attached or adjacent hotel or vital transportation linkages to premium hotels in the area.
CHALLENGES

THE OVERALL CHALLENGE IS TO ALIGN MULTI-COUNTY STAKEHOLDERS TOWARD A SHARED VISION OF COASTAL TOURISM DEVELOPMENT.

CHALLENGE // IKE DAMAGE AND AFTERMATH

In September 2008, the Galveston area was hit by Hurricane Ike. The Category 2 storm caused an estimated $11 billion in damages across the state of Texas. Over the next 18 months, the Galveston community spent considerable time and funds recovering from the hurricane and reestablishing itself as a business and tourism destination. Galveston is still a community in recovery. A significant portion of Galveston’s infrastructure was flooded by Hurricane Ike. According to economic development stakeholders, the extensive damage and the significant amount of post-hurricane rebuilding have stretched Galveston County’s capacity and resources. Improved coordination and capacity development, and better planning, could help address some of these issues. The Bolivar Peninsula remains the most impacted area from Hurricane Ike and presents the greatest challenge for recovery.

CHALLENGE // DISASTER FATIGUE

Many residents and businesses have expressed disaster fatigue from the series of natural and man-made disasters that have impacted the region over the past several years. Impacted businesses, economic development organizations, and chambers of commerce that support local businesses/industries are still navigating uncharted territory en route to long-term recovery. Across the board, resources are stretched and long-term planning is often eclipsed by the struggle to meet immediate organizational and service needs.

However, this can also be viewed as an opportunity in that after having experienced several consecutive disasters, the region has developed considerable resiliency. Further the region has built up experience in post-disaster response, in terms of infrastructure, economic development and social services delivery.

CHALLENGE // INDEPENDENT WORKING NATURE OF THE COUNTIES

The local culture lends itself to a “can do it” spirit which has culminated in very resilient communities in the wake of multiple disasters, as noted above. However, this same culture has at times also prevented jurisdictions from working collaboratively, especially across county boundaries, where they may have been historically competing for the same funds or have had disincentives to working together.

CHALLENGE // LACK OF CROSS-COUNTY UNDERSTANDING OF TOURISM ASSETS WITHIN REGION

The independent working nature of the respective counties may also lend itself to a disconnect of cross-county understanding about the various tourism assets found throughout the region. All four counties hold assets in various areas that are considered part of coastal tourism, including: beach and coastal recreation; nature tourism; heritage/historical tourism; and festivals and events.

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While most stakeholders said that they were aware of the various assets found throughout the county that they work or live in, many also noted they were unaware of the vast array of assets found throughout the other counties in the study region. Failure to communicate and promote to one another is costing them “backyard” marketing opportunities which at the very least could contribute to increased day spending and at best helps build word-of-mouth reputation and social media buzz. Consistent communication in simple forms must be a priority.

**CHALLENGE // LACK OF COMMON VISION AND BRAND FOR REGION’S TOURISM**

The aforementioned lack of understanding for the region's many tourism assets could be hindering the region from forming a collective identity that sends a signal that it’s aligned and ready for coastal tourists. Stakeholders are not currently on the same page in terms of what the region collectively has to offer to tourists and how it could move forward to brand itself through a common vision.

**CHALLENGE // LACK OF WAY-FINDING**

The study region is lacking easily accessible highways, roads and trails into some of the area's most promising destinations for tourism. Signage and way-finding through all four counties is woefully lacking and must be a priority. All the attractions and activities were difficult to find even with maps and a GPS system. A visitor to the area would likely be disappointed at best and confounded at worst. Additional forms of wayfinding and signage can help create a sense of connectedness and ease of use for visitors.

**CHALLENGE // LACK OF TOURISM SERVICES AND AMENITIES**

Some areas are also lacking for basic conveniences like shopping and dining which may complicate the region's efforts to market themselves as a region for tourism. With few exceptions (Galveston, and the Bay Area) the hotel and motel products are underdeveloped and ill-equipped to handle increased tourism into the four counties. The current products are tired looking and look to target a budget-oriented tourist segment. While the lodging expectations for the avid nature-based traveler can be met with a budget hotel, it must be clean, comfortable and close to dining and shopping. The less avid nature traveler will expect this as a bare minimum and will likely expect an even higher standard of accommodation.

**CHALLENGE // LACK OF UNDERSTANDING AND DATA ON TOURIST TYPES AND PROFILES**

There is a general lack of understanding for three key types of data that are key in developing and tourism industry, 1) Who visits each county? (e.g., Baby Boomers and retirees, young outdoor adventurers.); and 2) Where do current tourists come from? 3,) Why are they visiting the area?

While there have been studies conducted to capture this type of data specific to Galveston, there is a lacking for detailed information for more rural parts of the study region. As a result, local stakeholders rely on anecdotal or ad hoc information and data that is too often skewed or obscured by the occasional foreign visitor for promoting their various assets.

**CHALLENGE // IMPACT OF INDUSTRY PRESENCE (OIL, CHEMICALS, ETC.) ON TOURISM APPEAL**

The petro-chemical industry has been present in the region for over a century and composes a large part of the region’s economic and job base. These industries and their supporting infrastructure dominate the skyline and landscape in and around all four counties. While this represents a local economic strength, nature travelers rarely
appreciate the connection between these industries and their natural pursuits. Persuading the uninitiated nature traveler to the nuances of the benevolent relationship between these industries and the quality of the air, water and soil will be a serious undertaking. Questions about water quality were an issue raised by several people which can define the type of water-based experiences that are enjoyed along the coast. Visitors will want answers to questions, such as “Is the water just murky or is it dirty?” There is a big difference and visitors need to know it.

**CHALLENGE // LACK OF FORMAL AND ATTRACTIVE “GATEWAYS”**

All the communities within the four county area have some gateway challenges, and none of the communities are distinguished or branded in a memorable way. The traveler rarely knows when he/she has arrived in a community, or where it begins and where it ends and what it offers. While Galveston serves as the largest city in the study region, it too lacks a strong gateway letting visitors know that they have arrived in what would be considered the main “hub” of the coastal region.

**CHALLENGE // LACK OF FUNDING**

The global recession has dramatically decreased government revenues across the board, including the federal, state and local levels. While the region has been somewhat buffered by the presence of the oil industry, the state’s tourism budget has been declining which has had a trickle-down effect to the local level. This leaves a critical gap where funding is needed for tourism infrastructure (e.g. signage and wayfinding, basic amenities, public restrooms, etc.) expected by tourists.

**CHALLENGE // LACK OF AVAILABLE AND AFFORDABLE HOUSING IN PARTS OF THE REGION**

The region has been hit with multiple hurricanes in recent years, leading the destruction of affordable housing stock that will more than likely not be rebuilt due to the high probability of future storms. Insurance availability and cost contribute to lack of affordability issues. This lack of affordable housing stock negatively impacts the return or pursuit of tourism industry employees necessary to operate tourism-related amenities.

**CHALLENGE // LACK OF LOCAL, EDUCATED REGIONAL TOURISM “AMBASSADORS”**

Tourism ambassadors serve as advocates for the region’s many assets and help to spread the word about the importance of tourism and the benefits conveyed by a strong tourism industry, including the economic impact on state and local tax revenue and jobs. Tourism ambassadors can be trained about the region and be provided a range of materials including speaking points, graphics and data about the region not only to educate tourists but also local residents on what the region has to offer. Additionally, frontline employees in hotels, restaurants, attractions and all visitor contact points must be trained and coached to deliver the visitor experience. This is an on-going, never-ending task but vitally important to the character of the visitor experience.

**CHALLENGE // LACK OF EASILY ACCESSIBLE OUTFITTERS IN COUNTIES AND ALONG THE COAST**

Stakeholders have noted that despite a vast array of water and nature-based tourism opportunities, there isn’t a noticeable supply of outfitters within the study region to provide guide and tours to visitors. This may be solely an economic issue, in which case local cities and counties need to address incentive or subsidy programs, or it may be a lack of knowledge as to the need and opportunity.
**Challenge // No Certification for Outfitters and Guides**

Stakeholders have noted that while there are some guides and outfitters throughout the region who provide services such as guided kayak tours and fishing outings, there is no formally recognized certification program for them.

**Challenge // Geographic and Travel Distances between Counties’ Tourism Assets**

The coastal tourism study area is large and spread out, which can make it difficult for visitors to easily traverse between various points of interest. The travel time between the birding and nature experiences and the existing accommodations is problematic. Birding takes place at dawn and sunset. This has birders on the road very early and very late on quiet, unlit roads.

For example, the travel time from Winnie to Palacios can vary drastically based on the geographic route. The inland route via Houston is 168 miles and takes about 3 hours. The coastal route via Galveston, Freeport, Brazoria, and Bay City is 176 miles yet takes about 4 hours and 40 minutes. While the Houston route is much shorter, the coastal route provides far greater scenic and coastal tourism opportunities.

**Challenge // Some Counties’ Tourism Assets Stronger than Others**

While some assets are at a point that they can be marketed and easily accessed by visitors, others are more difficult to find or are without needed accommodation and nearby dining options needed to keep visitors for multi-day trips. This is compounded by the challenges posed from the aforementioned geographic and travel distances between counties’ various tourism assets.

**Challenge // No Formal Champion to Organize Cross-County Tourism Strategy**

While stakeholders are motivated and interested to move forward on further developing their assets and coordination efforts in order to drive forward a coastal tourism strategy that would benefit the entire region, there is no official “champion” organization for this effort. As such, a newly formed regional task force to coordinate responses to address the above challenges and opportunities should be considered. A structure for such a coalition is offered below in the short-term strategies.
SHORT-TERM STRATEGIES

SHORT-TERM STRATEGY // FORM REGIONAL TOURISM TASK FORCE AND TOURISM STRATEGY

Champions from each county who can take ownership of carrying the process of developing a tourism strategy forward should be identified. These champions would come together in a task force that will lay the groundwork, do the homework and generally agree upon objectives, goals, strategies and tactics to move a regional coastal tourism strategy forward. Such champions will also serve as liaisons between their communities and the task force. During the IEDC site visit the Houston-Galveston Area Council (HGAC), the Gulf Coast Economic Development District (GCEDD) and the Greater Houston Partnership (GHP), were identified as potential partners that could serve as coordinators in spurring the formation of the regional task force. While these two economic development organizations can serve as a collective coordinating body, other champions from within each county should also be identified. The Gulf Coast Economic Development District will establish and lead the Coastal Tourism Task Force in late 2011, and incorporate coastal tourism as a regional initiative in its Comprehensive Economic Development Strategy in 2012.

It’s worth noting that the proper role for regional partners is one of *coordinator* to spur the formal development of the Regional Task Force. Once formed, the various individual champions that will form the Regional Tourism Task Force should be the collective *champion* of the effort. It remains for the counties and participants involved in the process to determine and further craft the mission and vision of the task force as well as identify the appropriate organizational structure and frequency that the group should meet. These are important questions that will need to balance the challenges of scheduling. Bringing the right people to the table that have the capacity and clout to implement likely changes that will result from the group’s strategy will be critical to the task force’s ability to succeed. As such, this issue will likely need to be addressed early in the process of the group’s formation such that expectations are correctly set. This transparency may also help stave off any early confusion or suspicion that someone else is working behind the scenes to channel the group’s thinking.

SHORT-TERM STRATEGY // DEVELOP A LIST OF TOURISM ASSETS

The development of a comprehensive list of tourism assets within each county will serve as a critical first step to educating all of the stakeholders on what the collective assets of the region are and where synergies could align. Based on IEDC’s site visit, the greatest common threads found were in coastal or Gulf of Mexico water experiences and in nature-based tourism.

This process can seem straightforward, but there are several key issues to address regarding the most appropriate and efficient way to conduct any kind of asset mapping while avoiding the twin challenges of complacency or bitter feelings among those partners that will be necessary to achieve the task. The following describes a useful framework for organizing and implementing a successful tourism asset mapping process, with step-by-step considerations.
Creating a Tourism Asset Inventory Database

Consider Size and Scope

Before a tourism asset inventory is undertaken, the breadth of the inventory should be considered. This will largely depend on the size of the region that is to be analyzed. Smaller geographic areas may need to consider including a wider range of relevant tourism-related assets in order to get an adequate representation of their area’s offerings.

Ten Tourism Themes

The project’s initial goal should be to classify the types of venues and events into a few general tourism themes. Each theme should include several “type designations” that help to further classify the venue or event. These basic categories will help ensure efficient cataloguing and make searching the inventory more efficient.

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<th>THEMES OF TOURISM ASSETS</th>
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<td>AGRICULTURAL</td>
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<td>Agricultural Festivals</td>
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<td>Gardens and Greenhouses</td>
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<td>CULTURAL</td>
<td>Arts and Crafts Events</td>
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<td>Arts / Cultural Organizations</td>
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<td>Railroad History</td>
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<td>LODGING</td>
<td>Hotels</td>
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<td>Motels</td>
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NATURAL ASSETS
- Campgrounds
- Bed and Breakfasts
- Trails
- Parks
- Nature Preserves
- Natural Resource Areas
- Beaches

RECREATION
- Recreational Retail / Service
- Fishing Access
- Golf Courses / Driving Ranges
- Sports and Recreation Facilities
- Playgrounds
- Fishing Services
- Recreational Events
- Boating Access
- Equestrian Facilities
- Sports Organizations

SHOPPING / RETAIL
- Antiques
- Art Supplies
- Gift Shops
- Second-Hand Stores
- Convenience Stores
- Specialty Retail Stores

TOURISM RELATED
- Nightlife
- Automobile Shows
- Bingo
- Community Events
- Movie Theaters
- Tourism Organizations
- Holiday Events
- Proposed Developments
- Businesses of Interest

Once the basic inventory has been assembled, it will serve as a solid foundation for many years. Of course, the inventory should be modified, updated, and added to as new area businesses, events, and other tourism-related resources enter the community.

Regular communication with community leaders and stakeholders is essential in order to gain input regarding new tourism themes. These recommendations and ideas should be put aside for future consideration in case the tourism niche further develops. Speaking with locals is also important because they are often the only people with detailed information about lesser known historical sites and structures. Once the task force has been made aware of their existence, it can develop information on them later.
Detailed Data Collection

As the task force becomes aware of tourism-related assets, it should begin collecting attribute data whenever possible. The following categories of information are recommended:

**Contact Information**
- Business or Organization Name
- Location (Including Any Particular Town Affiliation), Physical Address, Mailing Address, Telephone Number, Fax Number, Website Address, and Email Address
- Type of Organization (Commercial, Governmental, Public, Individual Artist/Performer/Vendor, or Nonprofit)
- Contact Information for Business Owners, Site Managers, and Event Coordinators

**Descriptive Information**
- Narrative Description
- Year Founded (for Businesses, Organizations, and Events)
- Year Constructed (if a Historic Structure)

**Operational Information**
- Event Date and Schedule Description
- Hours of Operation
- Admission Fees
- Parking Capacity
- Disability Accessibility

**Performance Data**
- Annual Attendance
- Number of Paid Staff
- Number of Volunteers

**Digital Information**
- GPS Coordinates
- Image/Photo (one per entry) with Photo Credits

**Database Administrative Information**
- Administrative Notes
- Image or Photo Token (Checkbox)
- GPS Coordinates Collected (Checkbox)

Gathering this information early will enhance the task force’s later planning efforts while also ensuring that the region is prepared to assist potential tourists in planning their trips. In addition, this data will allow the task force to accurately gauge current tourism activity, trends, and venue performance. The region’s tourism websites, brochures, and other media may also benefit from access to this data.
Collecting and Entering Data

Community Stakeholder Involvement

The community of stakeholders are the task force's most important resource, as their input is invaluable. The task force should work with tourism stakeholders such as government officials, community leaders, private sector representatives, and other interested citizens. This wide range of participants ensures that the inventory will be diverse.

The task force should consider reaching out to these stakeholders through initial meetings and brainstorming sessions, and, when possible, follow up on these meetings with telephone and/or personal interviews.

Creating the Inventory Database

The effective management of such a large amount of data requires using sophisticated software like Microsoft Access “to store, organize, and analyze the inventory data.” The program allows for data to be analyzed and displayed in multiple ways. It is flexible in that it can return answers to many different search combinations and specific user requests. However, successful management of Microsoft Access might require an organization to seek out technical training for its IT staff member(s).

Utilizing the Asset Inventory

Following these guidelines will allow for successful data collection. This, in turn, will enable the task force to better understand the region’s tourism assets. This knowledge will give the task force the ability to create statistical models, interactive maps, and better marketing materials. A well developed tourism asset inventory will provide an excellent foundation for tourism promotion and enhance the task force and the region’s ability to market itself.

SHORT-TERM STRATEGY // PLAN A REGIONAL ½ OR FULL-DAY WORKSHOP

A regional half or full-day workshop\(^{15}\) could serve as vehicle to get the buy-in of the region to move forward collaboratively on developing a regional tourism strategy. The list of tourism assets could be presented at this meeting and feedback could be provided to ensure all of the assets are being captured accurately.

Meeting Preparation

During IEDC's Technical Assistance visit, the importance of getting more, and a good mix, of regional stakeholders was stressed over and over. While there are no hard and fast rules as to when to bring various stakeholders into the planning process, it is worth putting thought into who should be at the table and when. This will be an important aspect to address in the workshop as the answer to these questions have the potential to greatly affect the outcome of the any regional tourism initiatives.

The workshop meeting could then also serve as a platform for discussing next steps in fulfilling the group’s mission. For example, are there missing pieces to the list of assets? How could the group use this information as a basis for future marketing and promotion of the region?

\(^{15}\) Planned several months in advance to include various stakeholders from the task force area
**Short-Term Strategy  //  BRANDING**

Either at the workshop or during a later event, the task force would benefit from an independent branding contractor to lead them through the challenging process of identifying a brand and brand promise for the region.

Hiring an independent branding consultant or contractor could help provide the framework for future regional collaboration based on the regional tourism asset mapping / assessment. It would also help to align the group’s disparate interests and county tourism assets into a meaningful vision of what the region should prioritize as the primary thrust of its tourism pitch to the outside world (both within the Houston region, Texas, the US and internationally).

Though a decision on ground rules prior to this type of branding exercise doesn’t necessarily need to be decreed before such a proposed workshop, it could prove useful to establish some guidelines as to what the group will accept regarding any potential branding suggestions. The group should consider questions like “Should the group require an absolute consensus on any implementing any branding suggestions?” “What are the potential “deal breakers” for any branding exercise?” For example, is it acceptable to include the names “Houston” or “Galveston” in potential branding, or does the group anticipate a complete neutrality regarding geographic names?

**SHORT-TERM STRATEGY  //  DEVELOP A TOURISM BASELINE**

**REGIONAL TOURISM TASK FORCE SHOULD USE THE RECENT CHAMBERS COUNTY RECONNAISSANCE REPORT ON TOURISM AS A BASELINE FOR WHAT COUNTIES NEED TO BECOME TOURISM READY**

The first step taken in the report was to hire an objective, outside visitor to conduct a tour of the county and to denote what assets there are to see and how easy or difficult it was to connect, find, and arrive at those assets as well as denote the quality of what those assets had to offer.

A similar-type of honest, objective analysis of each county’s tourism assets would serve to inform any future endeavors conducted by the task force. Each county along with particular individual communities within the counties that have strong existing tourism assets should begin the process of creating a tourism profile for themselves. This can begin with a SWOT (strengths, weaknesses, opportunities, and threats) analysis of each tourism asset. Stakeholders should begin by listing the strengths, weaknesses, opportunities and threats of the particular assets within their communities. Challenges and resources or training required to improve the destination should also be denoted. A list of proposals which would improve asset along with organizations or individuals which have agreed work towards implementing such improvements should be recorded. A work plan can be developed and made public so as to raise intra and inter county awareness about various tourism assets. This effort would have the tangential benefit of providing credibility to the task force when approaching other future stakeholders.

**SHORT-TERM STRATEGY  //  DEVELOP TASK FORCE SUB-GROUPS**

**Develop Task Force Sub-Groups to Focus on Each Core Area of the Overall Mission (e.g. Marketing and Communication | Nature-Tourism | Heritage Tourism)**

In the final workshop of the IEDC’s site visit, participants were asked to break up into three main groups: marketing and communication; nature-tourism; and heritage tourism. Each group was asked to evaluate possible next steps and priorities along with timelines for short-term and long-term strategies. While these areas seemed like a natural place to begin the process of evaluating what can be done to develop a regional coastal tourism strategy, certainly there
are other categories that could be identified as priority areas by the future task force. As these additional priority areas are identified, there will likely need to be some “translation” of these priorities into functional task force sub-groups that will become the drivers or champions of these focused subsets of priority areas.

There are a few points of consideration regarding the creation of such sub-committees.

**Additional Task Force Sub-Group Topic / Priority Areas**

Sub-Committees could be as broad or narrowly defined as the task force would prefer. As the task force moves forward with these types of task force sub-groups, it is worth keeping in mind that there may be additional task force sub-groups that could arise to address common concerns and challenges across each of these topical areas. For example, financing will likely be a continual challenge for each of the aforementioned priority areas, and as such, it may be worth considering developing a tourism finance sub-committee to begin focusing on the challenges of finding funding for any type of tourism project in the region. Government affairs will also, at some point become a likely a priority and will perhaps tie-in to many of the other sub-committees.

**Task Force Sub-Group Relationships**

It is worth considering how these task force sub-groups will interact and to whom they will ultimately report. Likewise, as these groups are being created it should be determined what their specific function will be. For example, are they simply to strategize and organize specific strategic efforts or are they responsible for implementation of these strategies? What will be the relationship between sub-committees and the overall task force? Will these sub-committees report directly to the task force to review and recommend policies, processes, and next steps to the task force, or are they expected to go further than brainstorming to become vehicles of actual implementation efforts?

**SHORT-TERM STRATEGY // COORDINATE ECONOMIC DEVELOPMENT AND TOURISM PLANS**

All of the counties have credible plans for economic development and tourism. Coordination within the region would assist in the implementation of these plans.

**Understand Your Regional Partners’ Goals**

Members of the task force could begin building a foundation for partnership by familiarizing themselves with what exactly it is that each county wants to achieve in its overall economic development efforts. Knowing where each county and its related entities are coming from will not only inform regional efforts, but will, through the process of information sharing, create an initial sense of collaboration among the partners at the table. How can the tourism goals of Matagorda County, a largely rural but growing county, intersect and mesh with the tourism goals of Galveston County, a more urban coastal setting for tourism, particularly in the context of both these counties’ overall economic development goals? Members of the task force can begin familiarizing themselves with the economic development efforts and goals of each county by reading one another’s strategic economic development and tourism plans (brief summaries of the major economic development and tourism plans are listed in Appendix E).
SHORT-TERM STRATEGY // NATIONAL RECREATION AREA DESIGNATION

A National Recreation Area is a Congressional designation to land and water with significant outdoor recreation potential. There are 18 NRAs in the US — including two in Texas — and most place emphasis on water-based recreation and range in geographic size, contiguity, ownership structure, governing institutions and functions.

Some NRAs are stand-alone while others are clusters of non-contiguous lands and structures (e.g. Golden Gate NRA). The National Park Service (NPS) provides a coordinating presence but may own little or none of the NRA lands. The National Park Service can however forge customized management partnerships in which state and local governments, nonprofit organizations and private landowners choose to play a formal role.

A Galveston Bay National Recreation Area is envisioned as a totally voluntary public-private partnership involving federal, state and local governments, non-governmental entities, and private businesses / parties / enterprises.

Potential Economic Benefits of National Recreation Area (NRA) Designation

National Recreation Areas enjoy an enhanced stature among the universe of recreational designations. NRAs are part of the national system of parks (includes Yellowstone’s Old Faithful and the Grand Canyon). NRAs are chosen for unique recreational potential and are recognized and valued by tourists from the US and the world. Visits to these national parks, recreation areas, and monuments reach 275,000,000+ each year. In 2005, the National Park System generated some $12,000,000,000 in revenues from visitation fees and associated sales in parks and their surrounding communities.

National Recreation Area for the Upper Texas Coast

The Upper Texas Coast isn’t currently marketed effectively to outdoor recreation enthusiasts and as a consequence fails to capture a fair share of this group’s considerable spending — $280,000,000,000+ in the US16. In terms of sales outdoor recreation retail exceeds automobile and light truck manufacturing, pharmaceutical manufacturing, power generation, legal services and motion picture sectors. This direct expenditure of $280,000,000,000 amounts to $730,000,000,000+ in indirect economic benefits.

Of all the subsets of the outdoor recreation industry, wildlife viewing generates 66,000,000 participants — 70% of whom are birders. Birding alone generates $82,000,000,000 in indirect economic benefits — including 671,000 jobs and $11,000,000,000 in local, state and federal tax revenue. One of the fastest growing outdoor sports in the US is recreational kayaking, growing by 7% (from 2008 – 2009).

If Galveston Bay could attain a National Recreation Area (NRA) designation — and the corresponding enhanced tourism stature that comes with this designation — there would likely be more visitors attracted to the region from beyond the Houston-Galveston region’s boundaries. The Golden Gate National Recreation Area, for example, is located within an area whose population is roughly 7.4 million, and attracts 14,000,000+ visitors annually. Similarly, the Gulf Islands National Seashore (Florida Panhandle) is in a geographic area with a population of around 800,000 but attracts 2,000,000+ visitors annually. In part, this owes to these destinations’ National Recreation Area status which effectively packages and promotes the recreational resources of these areas as a whole to the US. For the four-county Galveston Bay region, there’s an increased tourism appeal arising from the featuring of unique characteristics of each of the four counties, each with a complete assortment of tourism activities.

16 Rice University (SSPEED Center) & Houston Wilderness, Concept Paper (unpublished) titled “A National Recreation Area for Galveston Bay: Economic Prosperity and Flood Control Based on Natural Assets. February 1, 2011."
Figure D. Study Area of Proposed National Recreation Area (NRA)
MEDIUM TO LONG-TERM RECOMMENDATIONS

The overall goal of the Task Force will be to determine what types of efforts are important to developing the region’s coastal tourism and prioritize those efforts.

Medium-term Strategy // Identify Financing and Funding Mechanisms

Overall funding for this effort will be a challenge in light of state, county and municipal budget cuts. Alternative and creative financing mechanisms will need to be explored.

An immediate solution could be to combine portions of economic development marketing funds with tourism marketing funds to create a targeted public relations strategy to highlight the region’s many coastal tourism assets. While some communities something close to this structure might already be in place, in others it’s more desperately needed to be able to support coastal tourism efforts.

Additionally, a medium to long-term solution could come in the form of adding a hotels or meals tax in the places within the study region where there aren’t currently any. As well as a mechanism to direct existing tourism taxes towards funding a regional coastal tourism task force. The private sector would ideally work with area legislators to introduce such legislation. A legislative advocacy committee, formed internally to the future regional task force, could include county representatives, local chambers, and tourism-driven businesses. This could be done by developing a public education plan along with supporting materials including benefits, alternatives, and a clear purpose.

Tourism Business Improvement Districts (TBID)

Tourism Business Improvement Districts (TBID) are designed to help counter the downward trend for government spending on tourism. A TBID’s goal is to create a funding source that cannot be allocated for other purposes. TBID’s are created by local lodging operators to specifically fund tourism promotion efforts. The formation of TBIDs is creating a sizable impact on tourism promotion efforts. In a typical TBID process, local lodging operators agree to self-assess and request local governments to collect the funds and channel these funds toward an official identified tourism promotion organization (e.g. Visitors and Convention Bureaus). Many communities are developing plans to implement TBIDs in order to hedge against likely future budget cuts that threaten tourism-based economies.

Who Uses Tourism Improvement Districts?

TBIDs are re-aligning the tourism industry’s marketing funding strategies in two ways. First, organizations that currently exist in the tourism promotion industry are utilizing TBIDs to in an effort to guarantee and secure future funding streams and improve overall marketing budgets. Second, funding from TBID allows destinations who have previously been inactive regarding the promotion of their destination to create Destination Marketing Organizations (DMOs) and begin marketing their locality.

How will this novel source of tourism funding impact communities? One likely result is that tourism destinations will become more competitive from increased competition. Destinations that utilize this novel sustainable stream of revenue and enhance their overall tourism funding are likely to have a distinct long-term competitive advantage compared to those funded solely by a Transient Occupancy Tax. TBID formulas are typically pegged to growth. With additional sales of room nights sold, additional revenue for tourism is generated.
**Medium-Term Strategy // Develop Tourism Profiles**

Based on the outcomes from the short-term activities, destinations and organizations should be advised to create and sustain an active profile on Trip Advisor, Yelp, and Google Businesses and Google Maps. Many visitors now plan trips well in advance using free online tools that provide reviews, rankings, and detailed information on destinations, events, accommodations, etc. The value to these products for tourists is that they can read information about a place based on the independent reviews of previous visitors to gauge their own interest in that place. The value for a place or destination trying to attract visitors is that they can read honest, critical feedback to understand visitors’ true opinions of a place — which can feed improvements or solidify a destination’s positive reputation.

These tools can be double-edged swords: if a place or destination lacks an experience that a visitor desires, that place’s profile will likely receive negative feedback that will then presumably affect the decisions of future travelers on whether or not to visit that place. However, positive feedback will provide solid reinforcement to a place as a being a desirable destination to visit, prompting future visitors to take note. Evaluating and monitoring a place or destination’s “performance” on these sites is critical to understanding what is making the place or destination attractive or unattractive to future visitors.

**Examples**

- TripAdvisor profile for “Bay City Tourism”
- Yelp search results for Galveston “Arts and Entertainment”
- Google Maps’ search results for “Brazosport Hotels”

**Medium-Term Strategy // Develop a Regional Signage Plan**

A regional sign plan, (wayfinding) needs to be developed, adopted by the region, funded and implemented. Thousands of visitors travel annually to the study region. Some are tourists visiting hot spots such as Galveston and looking for commercial destinations and services, while others are full and part-time residents seeking recreational opportunities. However, some of the local assets with the most potential for tourism demand are not located on the main thoroughfares. Virtually no regional signage system exists and signs are dated, insufficient and not coordinated. Well-designed signage helps put visitors at ease when they enter a community and provides for a more memorable and enjoyable experience.

A wayfinding task force of 2-3 representatives from each county should be created. Their role is to kick off the process and coordinate the process from start to finish. Funding will be a challenge given the current state of local and state budgets, and the task for will need to explore creative funding mechanisms for signage. Some signs might be eligible for preservation grants (see text box on Preserve America). Steps the task force should take include:

- Identify existing signage inventory
- Conduct a gap analysis: what signs are missing (ranked in priority of need)  
- Evaluate if zoning ordinances will need to be changed to accommodate the needs of new way finding signs
- Evaluate fabrication/installation bids and make a recommendation to the coastal tourism marketing committee as well as receive buy in from the county governments
- Reconvene annually to assess progress and make additional recommendations and/or amendments
LONG-TERM STRATEGY // REGIONAL EVENT SCHEDULE

Region-wide festival, birding, and historical event scheduling and coordination would be a plus and allow for joint marketing and support, as well as regional brand development. Having one place that future visitors can visit online that summarizes the region’s many events can serve as a platform to build the region’s reputation and brand. This is an easy to implement yet high impact effort. The region already produces several very interesting festivals that can be leveraged to attract extended stays and increased numbers of tourism to the region. Additionally, cross-marketing and cross-pollinating at every event begins to build awareness and is much more affordable than direct advertising.

LONG-TERM STRATEGY // COORDINATED REGIONAL MARKETING

Marketing the four-county region must be a coordinated, integrated and multi-channeled effort. The overall goal should be to develop and disseminate messaging that will help target markets to “connect the dots” on what the four-county region has to offer. To the region’s advantage, there are already regional marketing efforts in place that could be piggy backed. For example, the upcoming Regional Visitors’ Center being developed at the Houston Airport could be an easy first target. Also, featuring tourism stories and opportunities in less conventional sources that will reach Houston as well as farther-reaching markets is a low cost, minimal effort with high outputs. For example, HGAC has offered to include tourism marketing pieces in their newsletter.

The small, medium and large iconic images that define the four counties must be collected and prepared for marketing. The exceptional destinations and experiences, meaning those things that surprise, and the distinguishing products and features must be catalogued. Further, the target markets and common denominators must be agreed upon; the target market cities and regions must be selected; and expertise must be contracted to develop a plan.

LONG-TERM STRATEGY // AGRI-TOURISM AND LOCAL FOODS MOVEMENTS

Other Resources and Ideas

There are a number of resources and ideas in the region that could help inform or spark an organized effort to develop a local food movement and corresponding agricultural branding of the Houston-Galveston region and the four counties. Some of these resources and ideas might include:

— REGIONAL LOCAL FOOD PRODUCTION EXPERTISE

There are area experts that could provide insight into best practices for developing profitable local food production. The Texas Agrilife Extension Service has local and regional staff that can provide a regional view of constraints and opportunities for local food production and supply in the Houston region.

— HOUSTON FOOD POLICY COUNCIL WORKGROUP

The Houston Food Policy Council Workgroup is working to increase the availability of locally grown found within the Houston metro region. While focusing on the metro area, the effort is developing a strong regional emphasis as the understanding of the regional food system increase. The mission of the Houston Food Policy Workgroup / Council is to “nurture the growth of a sustainable local food system, accessible to all, through education, collaboration, communication and creation of a food policy council for the Houston region.”

As such, the Food Policy Council and corresponding workgroup could serve as an excellent early stage partner to a local foods movement. It’s a volunteer-based organization (open to the public) and generally
includes representation from local leaders of many diverse organizations working on food issues in the Houston region. The organization meets to discuss and encourage local food production and consumption and has begun to initiating projects to working towards its stated mission. The group depends on various areas of member expertise, and includes representation form H-GAC and the GCEDD.

— FARMERS MARKETS and LOCAL SEAFOOD

The Houston-Galveston area is fortunate to be in a climate in which it could exist without importing much food. The city and surrounding areas have a year-round growing season, balanced rainfall and large amounts of fertile land. Galveston Bay has a highly productive ecosystem with fish, shrimp and oysters.

Farmer’s Markets are blossoming across the region from over six markets within Houston to several markets in the region’s suburban and small cities. The region also supports Community Supported Agriculture (CSAs) establishments for vegetables and meat products, a few wineries, and a growing number of niche producers to meet the region’s diverse cultural culinary needs. Blue Heron Farm, Gundermann Farms, Haak Winery, and Home Sweet Farm, are three examples of active participants in local food production. Urban Harvest is a prime example of a local non-profit that is increasing the production of local food via community gardens and education of citizens and farmers on growing techniques. The Houston-Galveston region could begin to explore the idea of expanding farmers’ markets and their accessibility via grant programs for agricultural start-ups and the idea of creating an infrastructure program for these markets.

Galveston Bay is one of the most productive estuaries in the nation and is a prime shrimping, oyster and blue crab fishery. There is a large potential of branding local seafood and leveraging local food and tourism opportunities that run the gamut from catching the seafood to preparation and cooking classes.
Stakeholders have noted the need to develop a strong regional map that depicts all of the study region’s many coastal tourism assets which visitors can use as an informational and navigational guide. Good examples to draw from that were mentioned by stakeholders included the Texas Trails and Texas Birding Maps.

The below map from Loudoun County, Virginia is a good example of a printable (non interactive) map that showcases the region’s tourism attractions, which in this case are specific to farms and wineries. The map is clear and easy to navigate when printed and also has space on the page for descriptions of the various destinations.

Loudoun’s 2011 Spring Farm Tour
May 21 & 22
10 AM – 4 PM

Get to know Loudoun’s rural community by spending a weekend in the county during the Spring Farm Tour May 21-22. Their visit again and again, throughout the spring and summer. Field fresh fruits, vegetables, flowers and plants, grown by farmers you know and trust, are sold throughout the growing season directly on the farm and at area Farmers Markets. Purchasing farm-fresh products from Loudoun farmers is an investment in your community, and helps preserve Loudoun’s rich agricultural heritage!

For up-to-date Farm Tour information, visit www.loudounfarms.org
An interactive, internet-based map should also be considered for development in the long term. The State of Maryland’s official tourism website is an excellently detailed one-stop shop for prospective tourists. The site provides a wide array of services and information that helps to empower users and encourage individual’s that are planning vacations. Therefore, it can serve as an excellent model for other tourism asset mapping projects. After loading the page, the user is presented with an interactive map of Maryland.

Users can view a standard map, a satellite map, or a map that has been broken into five regions. Each map is overlaid with icons representing “significant historical events, local culture, and renowned national treasures.”

The user will quickly notice the many different search possibilities that are provided. Above the map are links that include: Places to See, Things to Do, Places to Stay, and Places to Eat. To left of the map are six categories:

- Heritage Areas and Historic Places
- Scenic Byways and Driving Tours
- Arts, Culture, and Entertainment
- Parks, Waterways, and Trails
- Farm Fun and Locally Grown, and
- Information Centers.

In addition, users can simply choose to search the state’s database by hotel or restaurant name. For instance, searching for “Sheraton” would return the location of each Sheraton hotel in the state.
For example, if the user selects *Places to Eat*, a new page will open that asks the user to specify one (or more) region(s) and one (or more) different types of cuisine. These checkboxes can be coupled with a keyword to further refine the search.

**LONG-TERM STRATEGY** // **IDENTIFY OTHER PARTNERS TO SUPPORT AND SUSTAIN EFFORT**

While the local petro chemical industries can often be viewed as an unsightly distraction to nature-based tourists, there are exciting opportunities for collaboration between the industry and coastal tourism in the study region. For example, these corporations could be approached to help sponsor and fund events and programs that define regional relationships in positive ways. A partnership could be formed to create “legacy” events to clean-up, improve or enhance a nature-based tourism asset.

In addition to support from local industries, a State or National Scenic Byway may be considered as an obvious vehicle to create a common and agreed upon footprint and synergy among the counties and communities. This process requires leadership and cooperation, but once achieved and designated this would provide the region with another set of marketing channels through the state and federal websites.
The Greater Houston Partnership should also be viewed as a key ally as it has stated its intention to ramp up its tourism initiative. This needs to be explored as to their intentions, capacity and objectives. This could potentially be a valuable resource and partnership to move this initiative along.

Further, the region’s connection to A&M and Rice University (National Recreation Area) needs to be leveraged and exploited not only to help with developing a respectable tourism product but to assist with defining the region, branding it, marketing it and identifying resources for infrastructure and wayfinding. Early programs to work with ranchers and an agri-tourism program are scratching the surface.

Lastly, Voluntourism is a logical target market given the heavy-lifting of recovery still to be done in the four-county region in the wake of Hurricane Ike and the Deepwater Horizon oil spill. An inventory of every project desired or needed by every community and county would identify potential “legacy” projects that could be marketed as voluntourism opportunities. Experiential travel in all its forms is growing stronger in all market segments and across all demographics and lifestyles. The four counties have an opportunity to leverage their authentic experiences, and great needs, to lure visitors and continue re-building. A local area foundation or consortium of non-profits could be engaged to coordinate these opportunities.

**LONG-TERM STRATEGY / DEvelope local entrepreneurship support programs**

The counties in the study area do not appear to have robust entrepreneurial support programs which could help small businesses (e.g. outfitters, restaurants, etc.) get started and thus further develop the region’s tourism assets to attract multi-day visitors. Each county or city within the counties, to the extent they are not already developing within the counties, to the extent they are not already developing them, should begin this effort in the medium term and continue it into the long term program a part of their tourism and economic development strategy.

Entrepreneurship programs can start small by drawing on already existing programs, and then expand over time as financial and programmatic resources grow. The standard approach should include a region-wide mentorship program, the identification of potential funders in the region (e.g. Angel Investors, Venture Capitalists, and alternative financing including SBDCs) as well as the identification of incubators. As a starting point, the economic development organizations from throughout the region should collectively identify what entrepreneurship and business start-up assets and resources they have to currently offer. A six-pronged assessment tool can be found in the appendix of this report and offers an entrepreneurship assessment checklist. An additional resource, [www.youreconomy.org](http://www.youreconomy.org), tracks establishments (by phase of growth) on an annual basis.

The Rural Policy Research Center conducted an evaluation of the Appalachian Regional Commission’s (ARC) Entrepreneurship Initiative (1997-2005) and highlighted best practices that they found within the Initiative. These include:

- Successful entrepreneurship initiatives had sparkplugs or local champions who provided leadership for these efforts.
- Local capacity was a key to success. When strong organizations with existing capacity were already in place, ARC investments had a catalytic effect.
- Program self-sufficiency (sustainability) and success went hand in hand.
- Entrepreneurship development was recognized to be a long-term process.
- Successful projects altered their goals and approaches as conditions warranted.

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17 Appalachian Regional Commission. [http://www.arc.gov/images/programs/entrep/CreatinganEntrepreneurialAppalachianRegion.pdf](http://www.arc.gov/images/programs/entrep/CreatinganEntrepreneurialAppalachianRegion.pdf)
Partnerships and collaborations were important to success. Successful projects marshaled resources by forming partnerships and collaborating with other organizations to share resources and build capacity. They leveraged assets and avoided duplication of efforts. These partnerships also facilitated networking among service providers, creating a better environment for entrepreneurs.

Successful projects celebrated and shared the story of their success. Many projects engaged the media to help build community support as well as to publicize their activities as part of a broader marketing campaign.

Building a broader base of support for entrepreneurship investments requires continued efforts to “make the case” to local leaders.
## Timeline of Strategies

### PROPOSED TIMELINE

| Strategy | YEAR ONE | | | | | | YEAR TWO | | | | | | YEAR THREE | | | |
|----------|----------|---|---|---|---|---|---|---|---|---|---|---|---|---|---|---|---|
| Form Regional Tourism Task Force & Tourism Strategy | 3 Months | | | | | | | | | | | |
| Develop a List of Tourism Assets | 3 Months | | | | | | | | | | | |
| Develop a Tourism Baseline | 6 Months | | | | | | | | | | | |
| Develop Task Force Sub-Groups | 3 Months | | | | | | | | | | | |
| Branding Initiative | 3 Months | | | | | | | | | | | |
| Plan a Regional 1/2 or Full-Day Workshop | 3 Months | | | | | | | | | | | |
| Coordinate Economic Development & Tourism Plans | 9 Months | | | | | | | | | | | |
| Identify Financing & Funding Mechanisms | | 9 Months | | | | | | | | | | |
| Develop Tourism Profiles | | 6 Months | | | | | | | | | | |
| Coordinate Event Schedules | | 9 Months | | | | | | | | | | |
| Coordinate Regional Marketing | | 6 Months | | | | | | | | | | |
| Develop Four-County Tourism Asset Marketing Map | | 6 Months | | | | | | | | | | |
| Develop a Regional Signage Plan | | | | | | | | 12 Months | | | | | | | |
| Develop Local Entrepreneurship Support Programs | | | | | | | | | | 12 Months | | | | | |
| Identify Other Partners to Support & Sustain Effort | | | | | | | | | | | | 12 Months | | | | |
APPENDIX

A. Qualitative Assessment by Economic Development Organizations (EDOs) for Developing an Entrepreneurial Ecosystem

COMMUNITY ENTREPRENEURSHIP ASSESSMENT CHECKLIST

Use this checklist to assess what services are currently provided in your community. This assessment should be supplemented with information from the tables that follow, which capture more detailed information about each of the services provided. This checklist and the tables that follow must be completed by the EDO and other institutional players in the community.

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Entrepreneurship Support Services

**BUSINESS PLANNING**
- Mentoring
- Industry networks
- Technical assistance
- Competitive intelligence
- Marketing
- New market development (including exports)
- Technology transfer, commercialization and licensing programs
- E-commerce
- Management skills
- Specialized space (e.g., wet labs)
- Capital Access
- Financial literacy
- Microfinance
- Seed finance
- Revolving loan funds
- Venture capital
- SBICs
- Other equity
- SBA loans
- Angels
- Government-backed
- Other debt
- CDFIs
- Other financial institutions Business Services
- Legal
- Accounting
- Human resources
- Information technology
- Intellectual property
- Health and safety
- Environmental/regulated
- Energy efficiency

**EDUCATION AND TRAINING**
- K-12 entrepreneurship education
- Post-secondary entrepreneurship education
- Kauffman FasTrac training or similar
- Internships

**COMMUNITY**
- Community groups sponsoring entrepreneurship efforts
- Chamber of commerce with entrepreneurship programming
- CDC or other neighborhood groups with entrepreneurship programming
- Business plan competitions
- Entrepreneurship celebrations
- Sufficient and positive media coverage of entrepreneurship
**ENTREPRENEURSHIP SUPPORT SERVICES ASSET MAP**

For the following services, identify who is able to offer each service, to whom it is offered, any costs involved, and if available, some assessment of service quality. Also note where gaps exist.

<table>
<thead>
<tr>
<th>Entrepreneurship Support Service</th>
<th>Who Offers This Service? (note if it is not available in the community)</th>
<th>What Type of Entrepreneur Does It Support? (e.g. lifestyle, growth)</th>
<th>Service Costs</th>
<th>Quality Assessment (if available)</th>
</tr>
</thead>
<tbody>
<tr>
<td>Business Planning</td>
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<tr>
<td>Industry Networks</td>
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<tr>
<td>Technical Assistance</td>
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<tr>
<td>Market Intelligence</td>
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<tr>
<td>Marketing</td>
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<tr>
<td>New Market Development (including exports)</td>
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<td></td>
<td></td>
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<tr>
<td>Technology Transfer, Commercialization and Licensing Programs</td>
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<tr>
<td>E-Commerce</td>
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<tr>
<td>Management</td>
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<tr>
<td>Specialized Space (e.g. wet labs)</td>
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</tbody>
</table>
**Capital Access Asset Map**

For the following services, identify who is able to offer each service, to whom it is offered, any costs involved, and if available, some assessment of service quality. Also note where gaps exist.

<table>
<thead>
<tr>
<th>Capital Access Asset / Service</th>
<th>Who Offers This Service? (note if it is not available in the community)</th>
<th>What Type of Entrepreneur Does It Support? (e.g. lifestyle, growth)</th>
<th>Service Costs</th>
<th>Quality Assessment (if available)</th>
</tr>
</thead>
<tbody>
<tr>
<td>Financial Literacy</td>
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<tr>
<td>Microfinance</td>
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<tr>
<td>Seed Finance</td>
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<tr>
<td>Revolving Loan Funds</td>
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<tr>
<td>Venture Capitalists</td>
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<tr>
<td>Angels</td>
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<tr>
<td>SBICs</td>
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<tr>
<td>Other Equity</td>
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<tr>
<td>SBA Loans</td>
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<tr>
<td>Other Financial Institutions</td>
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<tr>
<td>Government-Backed</td>
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<td>Other Debt</td>
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<tr>
<td>CDFIs</td>
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<tr>
<td>Other Financial</td>
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</tbody>
</table>
**Business Services Asset Map**

For the following services, identify who is able to offer each service, to whom it is offered, any costs involved, and if available, some assessment of service quality. Also note where gaps exist.

<table>
<thead>
<tr>
<th>Business Service</th>
<th>Who Offers This Service? (note if it is not available in the community)</th>
<th>What Type of Entrepreneur Does It Support? (e.g. lifestyle, growth)</th>
<th>Service Costs</th>
<th>Quality Assessment (if available)</th>
</tr>
</thead>
<tbody>
<tr>
<td>Legal</td>
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<tr>
<td>Accounting</td>
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<tr>
<td>Human Resources</td>
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<tr>
<td>Information Technology</td>
<td></td>
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<tr>
<td>Intellectual Property</td>
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<tr>
<td>Health and Safety</td>
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<tr>
<td>Environmental / Regulatory</td>
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<tr>
<td>Energy Efficiency</td>
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</tbody>
</table>
**EDUCATION AND TRAINING ASSET MAP**

For the following services, identify who is able to offer each service, to whom it is offered, any costs involved, and if available, some assessment of service quality. Also note where gaps exist.

<table>
<thead>
<tr>
<th>Education and Training Asset / Service</th>
<th>Who Offers This Service? (note if it is not available in the community)</th>
<th>What Type of Entrepreneur Does It Support? (e.g. lifestyle, growth)</th>
<th>Service Costs</th>
<th>Quality Assessment (if available)</th>
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</thead>
<tbody>
<tr>
<td>K–12 Entrepreneur Education</td>
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<tr>
<td>Post-Secondary Entrepreneurship Education</td>
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<tr>
<td>Entrepreneurship Training such as Kauffman FastTrac or Other Similar</td>
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<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Internships</td>
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</tbody>
</table>
# Community Asset Map

For the following services, identify who is able to offer each service, to whom is offered, any costs involved, and if available, some assessment of service quality. Also note where gaps exist.

<table>
<thead>
<tr>
<th>Community Asset / Service</th>
<th>Who Offers This Service? (note if it is not available in the community)</th>
<th>What Type of Entrepreneur Does It Support? (e.g. lifestyle, growth)</th>
<th>Service Costs</th>
<th>Quality Assessment (if available)</th>
</tr>
</thead>
<tbody>
<tr>
<td>Community Groups with Entrepreneurship Efforts</td>
<td></td>
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<tr>
<td>Chamber of Commerce with Entrepreneurship Programming</td>
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<tr>
<td>Neighborhood Groups (CDC) with Entrepreneurship Programming</td>
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<tr>
<td>Business Plan Competitions</td>
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<tr>
<td>Entrepreneurship Celebrations</td>
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<tr>
<td>Media Coverage of Entrepreneurship</td>
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</tr>
</tbody>
</table>
Entrepreneurship Resources for Community Leaders

Association for Enterprise Opportunity (www.microenterpriseworks.org)

U.S. Department of Treasury, CDFI Fund (www.cdfifund.gov)

CFED (www.cfed.org)

Coleman Foundation (www.colemanfoundation.org)

Community Development Venture Capital Alliance (www.cdvca.org)

Consortium for Entrepreneurship Education (www.entre-ed.org)

EntreWorks Consulting (www.entreworks.net)

Heartland Center for Leadership Development (www.heartlandcenter.info)

Kauffman Foundation (www.kauffman.org)

National Business Incubation Association (www.nbia.org)

National Dialogue on Entrepreneurship (www.publicforuminstitute.org/nde)

National Association of Seed and Venture Funds (www.nasvf.org)

RUPRI Center for Rural Entrepreneurship (www.energizingentrepreneurs.org)
B. Target Market Characteristics\(^\text{19}\)

**BIRDERS**

**BIRDERS ARE THOSE WHO PARTICIPATE IN BIRD WATCHING, RECORDING BIRD SPECIES OR BIRDCALLS AND/OR PHOTOGRAPHING BIRDS AS A HOBBY OR AVOCATION.**

The American Birding Association and the U.S. Fish and Wildlife Service estimate that there are 48 to 50 million bird watchers in the United States, of which 20 million travel away from home for birding. Of that 20 million, almost 7 million traveled to another state to bird watch. Birders contributed over $36 million to the U.S. economy in 2006.

**Who They Are:** The age range for birders is evenly divided with 23% falling in the 35 to 44 year range, 25% in the 45 to 54 year range and 27% in the 55 plus age range, accounting for 75% of those pursuing this interest. Likewise, their income levels are also divided with 22% at $30,000 to $49,000, 27% at $50,000 to $74,000 and 29% at $75,000 or more. With regard to education, about 51% of birders have some college education or are college graduates. Birders are fairly evenly split between females (with 54%) and males (with 46%). American Caucasians pursued birding to a greater degree than Hispanics, African Americans, Asians or other segments of the U.S. population accounting for more than 70% of birders. Birding is recognized as the second-fastest growing outdoor activity behind gardening, showing approximately an 8% growth year after year, which correlates with the Baby Boomer population moving toward semi-retirement or retirement and spending more leisure time in pursuit of travel for their interests.

**Where They Are:** Birders tend to live across the entire country and are willing to travel to their bird watching destinations. One third (33%) of birders live in the southern tier states, 27% live in the mid-western states and 21% live in the western states. Kansas, Nebraska, Missouri, Colorado and Oklahoma rank in the mid-range of birding participation with 21% to 30% of the bird watching population. Montana ranks highest at 40%. Birders ranked waterfowl, birds of prey and songbirds as the most observed birds in their away-from-home travel at 77%, 71% and 69%, respectively.

**Preferences and Characteristics:** Survey information from Travel Industry Association tells us that birders are inclined to drive their own vehicles to sites; stay in mid-to-upscale hotel properties, boutiques or B&Bs; and eat casually at mid-range restaurants but also treat themselves to fine dining. Preferred experiences range from enthusiastically trekking into the tough woodlands, marshes and mudflats in pursuit of bird sightings to a more laid-back and refined birding experience on trails and manicured footpaths. Grandparents and middle-aged parents are sharing their interest with children and grandchildren and many see this as an opportunity for generational growth within this category. Birders read birding and travel magazines online and in publications, are active in their communities and belong to birding networks or clubs, avidly sharing their sightings and experiences with other birders and friends and family.

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\(^{19}\) DiMario and Associates
**Nature Travelers**

**Nature Travelers are leisure travelers who plan trips for the purpose of seeking and enjoying natural assets and scenic attractions while hiking, fishing, bird watching, enjoying foliage and/or seasonal changes, lakes, mountains and natural resources.**

Generally, this category transcends all age ranges. More than 70 million people, (31% of Americans) ages 16 and up have fed, observed or expressed an interest in experiencing wildlife and nature in some form either on a dedicated trip for that purpose or in conjunction with another trip purpose. Of these 70 million, 32% enjoyed some aspect of nature travel on a trip away from home and spent more than $13 billion.

**Who They Are:** Roughly half of the Nature Traveler category falls between the ages of 35 and 54, and the population is split relatively equally between males and females with 46% male and 54% female. 89% of the Nature Traveler group earned a high school diploma, while only 33% of them have a college degree. Nearly half of these travelers have a household income of more than $40,000, 24% of which have incomes of more than $75,000. The average amount that each person in this market spent on wildlife watching in 2001 was $738. Of these travelers, 64% come from an urban environment and seek the idyllic getaway of natural landscape.

**Where They Are:** 61% of nature travelers come from the Northeast or Southeast regions of the United States with a much lower portion coming from the Midwest and Southwest. Many of these travelers come from cities/urban areas.

**Preferences and Characteristics:** These travelers are likely to explore destination-specific nature studies, participate in eco-tourism, volun-tourism and geo-tourism activities and are generally socially conscious in their decision-making. They appreciate walking tours and observation areas and lookouts from which to experience the scope of the destination. 68% of nature travelers visit woodlands, 63% lakes and streams and 57% brush lands/fields and prairies. 64% of nature travelers participate in wildlife observation, and when examining wildlife, 85% of nature travelers enjoy watching birds and 71% watch land mammals. 82% of these travelers enjoy the activity of feeding wildlife.

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**Soft Adventure-Seekers**

**Soft Adventure Seekers are those whose travel preferences include activities that balance mild physical activity with sufficient downtime to recharge. These travelers seek off-the-beaten path experiences and unspoiled or natural environments.**

Ranging in age from 16 to 80, these travelers seek to renew and re-energize, relax and reflect in a variety of environments using hiking, backpacking, camping, biking, fishing, kayaking, rowing, low-impact hill climbing, horseback riding and geo-caching as vehicles. The younger travelers, with family or friends, tend to pursue a higher degree of physical activity and a more rustic experience. While they require very little in terms of infrastructure and amenities, it is estimated that their spending is a quarter of that generated by young adults, Baby Boomers and active seniors in these same destinations. However, these age groups have higher expectations for easily accessible and affordable infrastructure and soft adventure services like bicycle, kayak and boat rentals and the availability of upscale hotels, dining and shopping amenities at the end of their day. Experiential travel (total immersion experiences like a shadow day at Cheyenne Bottoms), geo-tourism and ecotourism are also enjoyed by those seeking a soft adventure experience.

**Who They Are:** Flat land or moderate hikers are typically in the mid-30’s age range (18-24 with 28% and 34% in the 25-44 age group). Adventure hikers skew to a younger demographic. Males and females are evenly split at
51% and 48%, respectively. Of those hiking or enjoying a slightly more strenuous activity than walking, 69% have a college degree or more. 55% of those who enjoy hiking (or kayaking) are married or involved in a serious relationship. Race, ethnicity and income mirrors park visitors.

Where They Are: Like the wildlife refuge and parks visitors, those who hike are evenly distributed across the country, and there are hiking clubs established in most states.

Preferences and Characteristics: By definition, those seeking a soft adventure are going to look for a way to build on the experience or see it from another vantage point. These hikers (and leisure kayakers) are interested in enjoying the environment in a variety of ways and can include hiking, backpacking, camping, biking, fishing, kayaking, rowing, low-impact hill climbing, horseback riding and geo-caching as vehicles. Those who hike as a primary purpose for visiting require very little in terms of infrastructure and amenities but it is estimated that their spending is a quarter of that generated by those who travel for other purposes and hike as one activity among many. Travelers who hike but travel to the destination for a different primary purpose have higher expectations for easily accessible and affordable accommodations and services like cycling, kayaking and boat rentals. Experiential travel (total immersion experiences like a shadow day at Cheyenne Bottoms), geo-tourism and ecotourism are also enjoyed by those seeking a soft adventure experience. While hikers and kayakers will enjoy their sport alone, most prefer to travel as couples, with friends or in small groups.
C. Tourism Related Connections to Regional Universities

TEXAS A&M UNIVERSITY | DEPARTMENT OF RECREATION, PARKS AND TOURISM SCIENCES

— Texas AgriLIFE Extension Service (Nature Tourism)
  — Provides educational programs for public, private businesses, landowners and community leaders
  — South Texas Nature Tourism Extension Program (contact: Miles Phillips, Extension Specialist – Ecotourism)
    ▪ Nature Tourism: Business Planning and Formation
    ▪ Nature Tourism: Workshops and Training
    ▪ Nature Tourism: Marketing and Market
    ▪ Nature Tourism: Liability / Insurance
    ▪ Nature Tourism: Financial Projection Tools
    ▪ Nature Tourism: Guides and Guide Training

— National Extension Tourism (NET) at Texas A&M University
  — Mission: Enhance Extension tourism programs nationally by providing relevant information, useful resources and networking opportunities for Extension professionals, et al. working in broad area of tourism and recreation

UNIVERSITY OF HOUSTON

— Undergraduate Degrees and Specialty Programs
  — Hotel and Restaurant Management – Catering Management
  — Hotel and Restaurant Management – Country Club Management
  — Hotel and Restaurant Management – Event Management
  — Hotel and Restaurant Management – Gaming and Casino Management
  — Hotel and Restaurant Management – International Hospitality Management
  — Hotel and Restaurant Management – Lodging Management
  — Hotel and Restaurant Management – Restaurant Management
  — Hotel and Restaurant Management – Sales and Marketing Management
  — Hotel and Restaurant Management – Spa Management
  — Hotel and Restaurant Management – Tourism Management
  — Hotel and Restaurant Management – Wine and Spirits Management

— Graduate Degree Offerings
  — Joint Master of Science in Hospitality Management and MBA
  — Joint Master of Science in Hospitality Management and MBA
  — Master of Science in Hospitality Management
D. National Scenic Byways

**NATIONAL SCENIC BYWAY**

- National Scenic Byways are nationally known roads noted for their archeological, cultural, historic, natural, recreational, and/or scenic qualities (as recognized by US Department of Transportation)
- Program established by Congress in 1991 to preserve and protect the US’s scenic (but often less-frequented) roadways and tourism and economic development promotion
- National Scenic Byway program is administered by Federal Highway Administration

**ALL-AMERICAN ROADS**

- The most scenic roadways in the National Scenic Byway program are designated All-American Roads
- Designation indicates these roadways have features not existing elsewhere in US and they’re, themselves, considered tourist destinations
- There are 120 National Scenic Byways and 31 All-American Roads across 46 states20 (as of late 2010)

**DESIGNATION REQUIREMENTS**

- National Scenic Byways require a formal nomination process
- They also must already be designated as a scenic byway by the state to be nominated for National Scenic Byway designation21
- To be eligible for National Scenic Byway designation a roadway must meet at least 1 of 6 “intrinsic qualities” criteria for a scenic byway
- To achieve designation as an All-American Road a road has to meet at least 2 of the 6 criteria / qualities

**6 “INTRINSIC QUALITIES” CRITERIA**

- **Scenic Quality**
  - Enhanced visual attraction from views of natural and manmade components of a scenic byway corridor’s visual environment
  - “Strikingly distinct” landscape characteristics that offer enriching and notable visual experiences
- **Natural Quality**
  - Features in visual environment that are in a relatively undisturbed state
  - These features predate humans arrival (e.g. geological formations, fossils, landform, water bodies, vegetation and wildlife)
  - Evidence of human activity is allowable but natural features must reveal minimal environmental disturbances by humans
- **Historic Quality**
  - Historic legacies that are distinctly associated with a landscape’s physical elements — natural or manmade — that are historically significant and educate visitors and encourage appreciation for historic elements
  - Historic elements reflect actions of people (e.g. buildings, settlement patterns, etc.)

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20 All states except Hawaii, Nebraska, Rhode Island and Texas

21 Though there are exceptions for roads meeting all criteria & requirements for national designation but don’t meet State or designation criteria
— Cultural Quality
  — Evidence of distinct groups of people and their customs / traditions
  — Cultural features include crafts, music, dance, rituals, festivals, speech, food, special events or vernacular architecture

— Archeological Quality
  — Characteristics that are physical evidence of historic or prehistoric human life or activity
  — A corridor’s archeological interest (identified through ruins, artifacts, structural remains, etc.) has scientific significance and educate visitors while encouraging an appreciation for its history

— Recreational Quality
  — Outdoor recreational activities associated with (and dependent on) natural and cultural elements of corridor’s landscape
  — Recreational activities offer opportunities for both active and passive experiences and include skiing, rafting, boating, fishing and hiking
  — Driving the road itself may qualify as a positive recreational experience
  — Recreational activities may be seasonal, but quality and importance of these activities as seasonal operations must be well recognized

CORRIDOR MANAGEMENT PLAN (NATIONAL SCENIC BYWAY)

— A well-developed "corridor management plan" is required (with community involvement)
— It should provide for preservation and improvement of a byway’s “intrinsic qualities” and tourism and economic development promotion
— The plan must include:
  — Map that depicts corridor boundaries and the location of the different intrinsic qualities and land uses in / along the corridor
  — Proposed strategy to maintain and improve upon the corridor’s intrinsic qualities
  — Proposed strategy to illustrate how current development could be improved and new development accommodated while conserving the corridor’s intrinsic qualities
  — Review of roadway’s safety / accident record that considers potentially correctable faults in road design, maintenance, or operation
  — Wayfinding / Signage plan to illustrate a State will insure the roadway is supports visitor experiences (e.g. number and placement of signs)
  — Narrative detailing how a National Scenic Byway will be positioned for future marketing

CORRIDOR MANAGEMENT PLAN (ALL-AMERICAN ROADS)

— Corridor management plans for All-American Roads require:
  — Narrative for how an All-American Road will be promoted and marketed to draw visitors (especially international tourists)
  — Plan to encourage and accommodate increased tourism (if projected)
  — Demonstration of adequate level of tourist necessities — roadway, lodging and dining facilities, rest areas, et al. — for no. of visitors induced by byway’s designation as “All-American Road”
  — Plan for insuring multi-lingual information demands / needs

— The final step is when the highway (or highways) is approved for designation by the Secretary of Transportation.
E. Economic Development Plans and Reports (Tourism-Related Excerpts)

GULF COAST ECONOMIC DEVELOPMENT DISTRICT REGIONAL INDUSTRY CLUSTER ANALYSIS

IDENTIFIED CLUSTERS – The GCEDD region was found to be specialized in 7 clusters

- Biomedical / Biotechnical
- Business and Financial Services
- Chemical / Chem. Based Products
- Energy
- Fabricated Metal Product Manufacturing,
- Machinery Manufacturing
- Transportation and Logistics

BOLIVAR BLUEPRINT

BACKGROUND

- Bolivar Peninsula businesses are relatively small and generally service-oriented
- ≈ 97% of business establishments on the Peninsula have < 20 employees
- Most are dependent on seasonal rental / tourism market which peaks during summer months
- Of nearly 100 different businesses on Peninsula prior to Ike, almost all severely damaged or destroyed
- According to Bolivar Chamber of Commerce ≈ 35% of businesses had reopened by April 2009
- ≈ 65% of Peninsula homes were summer or rental properties and not occupied year round (2000 Census)
- With ≈ 3,600 structures destroyed or damaged, the Peninsula’s rental vacation industry has been decimated
- In Q1 and Q2 of 2008 hotel occupancy activity on Peninsula increased 13% (over same periods in 2007)
- During the last ½ of the year, rental activity on Bolivar Peninsula decreased by 67%
- During the Q4, there were no rentals
- Due to the effects of Ike the Peninsula’s rental activity for all of 2008 was down ≈ 14% (from 2007)

GOALS

- Blueprint vision describes what stakeholders would like to see the Peninsula become in recovering from Ike
- Rebuilt Peninsula will be resilient, affordable and safe place to live, visit and enjoy nature and recreation
- Will be built with respect for environment and sustainable land use, infrastructure and community services
- As part of its tourism-related economic goals, providing opportunities for ecotourism is a priority
- Re-establish tourism economy by providing better access, clean beaches, safety and affordable housing
- Create comprehensive, diverse parks and recreation opportunities (e.g. ecotourism) for residents and tourists
- Explore federal, state and private funding to improve ballparks and public restrooms at Gregory Park
- Master plan for all Peninsula parks to address educational programming and environmental protection
- Support Beach Parking Sticker Program using revenues to enhance and maintain beaches
- Utilize small areas of beach to develop pocket parks with public restrooms, showers and access to beach
- Develop and implement beach and bay use management plan to address access, vehicles, vendors, dune stabilization and wetlands protection
STRATEGIES AND ISSUES TO ADDRESS FOR PARKS, RECREATION AND TOURISM

ISSUE | LACK OF OPPORTUNITIES FOR ECO-TOURISM

— Approach #1 – Educate public on land holdings and sanctuaries (e.g., protection is good for business)
— Approach #2 – Dedicate additional wetlands and work with Chamber of Commerce and economic development agencies to market ecotourism
— Approach #3 – (a) Create comprehensive wetlands / open space policy and develop plan to attract more visitors, (b) examine opportunities to establish accessible State park on Bolivar Peninsula, and (c) research opportunities to develop ecolodging

ISSUE | DAMAGED PUBLIC PARKS

— Approach #1 – Restore parks to pre-disaster conditions
— Approach #2 – Establish improvement projects for ball fields and public facilities at Gregory Park
— Approach #3 – Expand park maintenance and services

ISSUE | LACK OF PUBLIC AMENITIES AT BEACHES

— Approach #1 – Increase land area available for beach / dunes system through disaster HMGP and other mitigation program buyout opportunities
— Approach #2 – Work with Galveston Co. Parks to update Galveston Co. Parks Master Plan and include requests for planning, design and implementation of beach access, parking, and support facilities
— Approach #3 – (a) Create Peninsula parks and beach use master plan to include comprehensive improvements, access management vendor management and centralized attractions, (b) identify funding, e.g., parking sticker program, for implementing plan and (c) expand development of Fort Travis for educational opportunities and provide services / facilities for recreational vehicle parking / camping

ISSUE | FISHING PIERS

— Approach #1 – Leave fishing amenities “as is” and encourage investment in sport fishing and new piers
— Approach #2 – Fund and construct fishing piers on both Gulf and Bay sides of Bolivar Peninsula
— Approach #3 – Study and implement improvements to attract fishing visitors (e.g., piers and jetties)

ISSUE | IMPLEMENT CURRENT GALVESTON COUNTY PARKS, RECREATION AND OPEN SPACE MASTER PLAN

— Approach #1 – Establish county-wide outreach program about assets on Bolivar Peninsula
— Approach #2 – Seek funding to implement plan elements
— Approach #3 – Incorporate Bolivar Peninsula Parks and Beaches component into 5-year Galveston County Master Plan to include new facilities. Establish local revenue stream to re-invest into community and fund elements of this revised plan
CHAMBERS COUNTY GREENPRINT FOR GROWTH AND CONSERVATION

GOALS

— One of the tourism-related goals of the Greenprint for Growth and Conservation is to increase public access for nature-based recreation
— Variety of potential publicly accessible nature-based recreation activities were mapped during the process

— Fishing Access
— Birding Sites
— Hiking Trails
— Canoe and Kayak Access
— Power Boat Access
— Parks and Playgrounds
— Biking Trails
— Equestrian Trails

ADDITIONAL RECREATION OPPORTUNITIES

County residents iterated a desire for broader recreational opportunities and many project opportunities were noted

— Create County–Wide Parks and Recreation Master Plan
— Establish Program of Park Fees and / or Set-Asides for New Development
— Create More Public Trails — such as:
— Lake Anahuac to Wallisville
— Along Main Canal to Four Corners
— Streets of old Wallisville
— Boardwalk from Fort Anahuac to Anahuac Harbor
— Re-build Fort Anahuac
— Dredge Channels for Recreational Vessels (and Beneficial Uses of Dredge Material)

MATAGORDA COUNTY STRATEGIC PLAN FOR ECONOMIC GROWTH (2005 – 2010)

Economic Development Expectations

— Matagorda Co. can influence only a limited number of factors involved in business location and tourist destination decisions — business or tourist determines their own set of decision criteria
— For a tourist, facilities needed would be a choice of accommodations, restaurants, recreation and entertainment activities, shopping, interesting features and a welcoming attitude

Strategic Plan Focus

— Need to expand number of visitor accommodations, retail support businesses, recreation and entertainment activities and special interest features to attract and keep more visitors in Matagorda County longer
— Co. recognizes private sector will have to create much of needed tourism infrastructure to grow these areas

Caveats to Matagorda County Economic Development

— New businesses and tourists will benefit many, but they may also be perceived as a threat by some
— New businesses may create more competition, or they may be seen as offering more opportunities
More tourists may be seen as bringing more retail, restaurant and entertainment options or as causing more traffic and water activity congestion

Economic Development Goals

- County hasn’t benefited from rapid job and economic growth occurring in Houston area
- Traditional seafood, petroleum production, agriculture and industrial bases are under economic pressures from foreign trade competition, resources depletion, low product prices and increased production costs
- County must use its underutilized natural assets to diversify from its traditional economic bases
- It should produce new tourism infrastructure to accommodate more visitors
- Target marketing should attract more visitors and more activities should be created to entice longer stays
2009 – 2011 COMPREHENSIVE ECONOMIC DEVELOPMENT STRATEGY

- Galveston is revitalizing its central business district to attract new businesses and encourage tourism
- Similar activities at various scales in Bay City, Columbus, Conroe, Dayton, El Campo and Huntsville, etc.
- These efforts are being supported by EDA grants as well as by funding from other programs
- Other major sources of funding include the US Department of Housing and Urban Development, Texas Community Development Program (administered by Texas Office of Rural Community Affairs), US Small Business Administration, Governor’s Office of Economic Development and Tourism, US Department of Agriculture – Rural Development (formerly Farmers Home Administration)

COUNTY NEEDS / ISSUES*

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