

NOTICE OF REGULAR MEETING
CITY OF SOUTH PADRE ISLAND
CONVENTION AND VISITORS ADVISORY BOARD

Note: There may be one or more members of the South Padre Island City Council and the Special Events Committee attending this meeting, and if so, this statement satisfies the requirements of the open meetings act.

NOTICE IS HEREBY GIVEN THAT THE CONVENTION AND VISITORS ADVISORY BOARD OF THE CITY OF SOUTH PADRE ISLAND, TEXAS WILL HOLD A REGULAR MEETING ON:

WEDNESDAY, AUGUST 28, 2019
9:00 A.M. AT THE MUNICIPAL BUILDING,
CITY COUNCIL CHAMBERS, 2ND FLOOR
4601 PADRE BOULEVARD, SOUTH PADRE ISLAND, TEXAS

- 1) Call to order.
- 2) Pledge of Allegiance.
- 3) Public announcements and comments: *This is an opportunity for citizens to speak to the Convention and Visitors Advisory Board relating to agenda or non-agenda items. Speakers are required to address the Convention and Visitors Advisory Board at the podium and give their name before addressing their concerns. (Note: State law will not permit the Advisory Board to discuss, debate or consider items that are not on the agenda. Citizen comments may be referred to Convention and Visitors Bureau staff or may be placed on the agenda of a future Convention and Visitors Bureau Advisory Board meeting).*
- 4) Consent:
 - a. Approve meeting minutes for July 24, 2019 regular board meeting.
 - b. Approve the excused absence from Board Members Bryan Pinkerton for July 24, 2019 regular meeting.
- 5) Presentation regarding The Atkins Group Media Plan. (Caum)
- 6) Update and discussion regarding Spring Break 2020 marketing and advertising. (Hart)
- 7) Update and discussion regarding the Fall marketing & advertising push for the Rio Grande Valley and San Antonio. (Salazar/Hart)
- 8) Discussion regarding CVAB support of the ConsultEcon phased proposal for a business plan for a South Padre Island "Nature Attraction". (Flores)
- 9) Discussion and possible action to approve the following funding requests for special events: (Caum/Amaya)
 - a. Sand Castle Days
 - b. Holiday Sand Castle Village
 - c. Lighted Boat Parade
 - d. South Possibility Island Weekend
 - e. U.S. Lifeguard Association Nationals 2019
 - f. U.S. Lifeguard Association Nationals 2020
 - g. Open Water Invitational



- h. Veterans Day
- i. SPI Pride

10) Presentation and discussion regarding Director's Report. (Caum)

- Convention and Group Sales
- Special Events and Packaging
- Marketing and Communications
- Social Media
- Research and Analytics
- Director's Notes
- Spring Break Results
 - *Newsletter Analytics

11) New Business:

- Board Comments

12) Discussion and possible action concerning setting new meeting date for September 2019. (Salazar)

13) Adjournment.

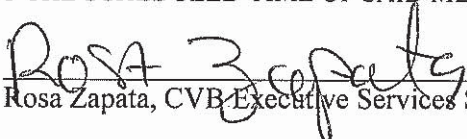
DATED THIS THE 23rd DAY OF AUGUST 2019.



Rosa Zapata, CVB Executive Services Specialist

I, THE UNDERSIGNED AUTHORITY, DO HEREBY CERTIFY THAT THE NOTICE OF MEETING FOR THE CONVENTION AND VISITORS ADVISORY BOARD OF THE CITY OF SOUTH PADRE ISLAND, TEXAS IS A TRUE AND CORRECT COPY OF SAID NOTICE AND THAT I POSTED A TRUE AND CORRECT COPY OF SAID NOTICE ON THE BULLETIN BOARD AT THE CITY HALL/MUNICIPAL BUILDING ON August 23, 2019, at/or before 5:00 P.M. AND REMAINED SO POSTED CONTINUOUSLY FOR AT LEAST 72 HOURS PRECEDING THE SCHEDULED TIME OF SAID MEETING.





Rosa Zapata, CVB Executive Services Specialist

THIS FACILITY IS WHEELCHAIR ACCESSIBLE AND ACCESSIBLE PARKING SPACES ARE AVAILABLE. REQUESTS FOR ACCOMMODATIONS OR INTERPRETIVE SERVICES MUST BE MADE 48 HOURS PRIOR TO THIS MEETING. PLEASE CONTACT BUILDING OFFICIAL DAVID TRAVIS; ADA RESPONSIBLE PARTY AT (956) 761-8103.



**CITY OF SOUTH PADRE ISLAND
ADVISORY BOARD
CONSENT AGENDA**

MEETING DATE: August 28, 2019

ITEM DESCRIPTION

NOTE: All matters listed under Consent Agenda are considered routine by the Advisory Board of the City of South Padre Island and will be enacted by one motion. There will not be separate discussion of these items, unless discussion is desired, in which case that item will be removed from the Consent Agenda and considered separately.

Items to be considered are:

- a. Approve meeting minutes for July 24, 2019 regular board meeting.
- b. Approve the excused absence from Board Members Bryan Pinkerton for July 24, 2019 regular meeting.

RECOMMENDATIONS/COMMENTS

Approve Consent Agenda

MINUTES
CITY OF SOUTH PADRE ISLAND
CONVENTION AND VISITORS ADVISORY
MEETING

WEDNESDAY, JULY 24, 2019

I. CALL TO ORDER.

The Convention and Visitors Advisory Board of the City of South Padre Island, Texas held a Meeting on Wednesday, July 24, 2019 at the South Padre Island City Council Chambers, 4601 Padre Boulevard, South Padre Island, Texas. Chairman Daniel Salazar called the meeting to order at 9:00 a.m. A quorum was present: Tom Goodman, Arnie Creinin, Pamela Romer, Chad Hart, and Bob Friedman.. Also present was Ex-Officio Jose Mulet. Absent was Bryan Pinkerton.

Staff: City Manager Randy Smith, Chief Financial Officer Rod Gimenez, CVB Director Ed Caum, Director of Marketing Research and Analytics Michael Flores, Executive Services Specialist Rosa Zapata, Office Manager/Accountant I Lori Moore, Group Business Development Director Gene Rios, Event and Sales Assistant April Romero.

II. PLEDGE OF ALLEGIANCE.

Chairman Daniel Salazar led the Pledge of Allegiance.

III. PUBLIC ANNOUNCEMENTS AND COMMENTS:

No public comments were given.

IV. Consent:

- a. Approve meeting minutes for June 26, 2019 regular board meeting.
Board Member Hart made the motion, seconded by Vice-Chairman Goodman to approve the meeting minutes. Motion carried unanimously.
- b. Approve the excused absence from Board Members Chad Hart and Bob Friedman for June 26, 2019 regular meeting.
Vice-Chairman Goodman made the motion, seconded by Chairman Salazar to approved excused absent for Board Members Hart and Friedman. Motion carried unanimously.
- c. Approve the National Tropical Weather Conference post special event report.
Vice-Chairman Goodman made the motion, seconded by Board Member Hart to approve the post Report for National Tropical Weather Conference.
- d. Approve funding request for the following:
The following items were pulled from consent agenda to be discussed separately.
 1. Ride for Rotary
Vice-Chairman Goodman made the motion, seconded by Board Member Creinin to approve \$1,500 in funding. Motion carried by those present.

2. Valley Haven Fishing Tournament

Board Member Creinin made the motion, seconded by Board Member Romer to approve \$5,000 in funding. Motion carried by those present.

3. Honor Challenge Obstacle Course Race

Board Member Hart made the motion, seconded by Board Member Friedman to approve the funding request in the amount of \$18,000. Motion carried unanimously by those present.

4. American Junior Golf Association

Board Member Friedman made the motion, seconded by Board Member Romer to approve funding request in the amount of \$10,000 for FY 2020. Motion carried unanimously.

5. South Padre Island Beach 13.1 and Relay/5k

Board Member Creinin made the motion, seconded by Board Member Hart to approve the funding request of \$4,000 for marketing and \$1,000 in-kind services. Board Member Romer abstaining from voting. Motion carried unanimously.

6. SPI Kitefest 2020

Board Member Creinin made the motion, seconded by Board Member Romer to approve the funding request in the amount of \$22,150. Motion carried unanimously by those present.

7. Sea Turtle Arts Trail

Board Member Creinin made the motion, seconded by Board Member Hart to approve the funding request of \$25,000. Motion carried unanimously by those present.

V. Discussion regarding CVB Website travel request Lead Form Refinement.

Discussion was held. Board Member Hart recommended revising the lead form. Possibly adding the fields approximate dates of travel, estimated number of guests, and preferred accommodations.

VI. Discussion regarding Newsletter Analytics.

Discussion was held. Board Member Hart requesting a heat map of the newsletter. The click through rate. Possible discussion at the next meeting.

VII. Discussion and action regarding Redawning contract.

Discussion was held. Board Member Hart recommended for RedAwning to modify their letter. Board recommended to shop for other options, revise the language on the contract, and CVB Director give an update regarding bookings at the monthly board meetings. No action taken.

VIII. Discussion and action regarding renew Rio Sports Live contract.

Presentation was given by Mr. Joe Bowling from Rio Sports Live. No action taken.

IX. Update and discussion regarding the strategic planning summit and Visitors Center reallocation.

Update was given by CVB Director Ed Caum regarding the strategic planning summit.

X. Presentation and discussion regarding Director's Report.

Convention and Group Sales report was given by Group Business Development Director Gene Rios. CVB Director Ed Caum gave a presentation regarding the Director's report.

**Convention and Group Sales
Special Events and Packaging
Marketing and Communications
Social Media
Research and Analytics
Director's Notes
Spring Break Results**

XI. NEW BUSINESS:

- Board Comments
Board Member Romer requested more information regarding regulations on conflicts of interest ruling.
Vice-Chairman Goodman reminded the importance of branding the island.

XII. DISCUSSION AND POSSIBLE ACTION CONCERNING SETTING NEW MEETING DATE FOR JUNE 2019.

New meeting date was set for Wednesday, August 24, 2019.

XIII. ADJOURNMENT.

There being no further business, Acting Chairman Salazar adjourned the workshop at 11:13 a.m.

Approved this 24th day of July, 2019.

Mr. Daniel Salazar, CVA Chairman

Attest:

Rosa Zapata, CVB Executive Services Specialist

DATED THIS THE **22nd** DAY OF **MAY 2019**.

**CITY OF SOUTH PADRE ISLAND
ADVISORY BOARD MEETING
AGENDA REQUEST FORM**

MEETING DATE: August 28, 2019

NAME & TITLE: Ed Caum, CVB Director

DEPARTMENT: South Padre Island Convention & Visitors Bureau

ITEM

Presentation regarding The Atkins Group media plan.

ITEM BACKGROUND

Presentation regarding FY 2019/20 media plan will be given by The Atkins Group.

BUDGET/FINANCIAL SUMMARY

COMPREHENSIVE PLAN GOAL

LEGAL REVIEW

Sent to Legal: YES: _____ NO: _____

Approved by Legal: YES: _____ NO: _____

Comments:

RECOMMENDATIONS/COMMENTS

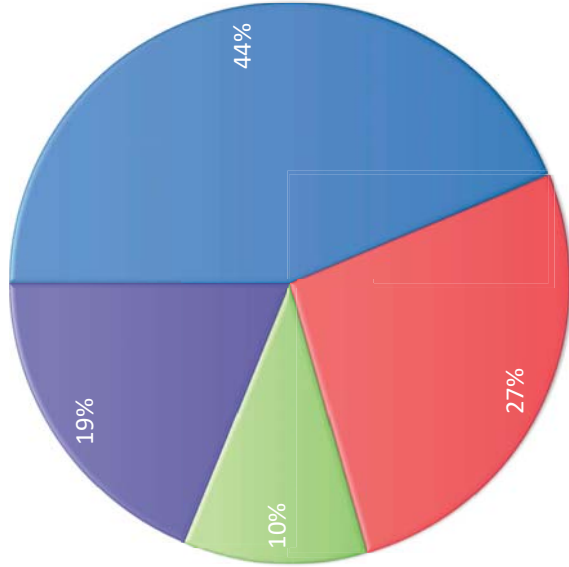
the **atkins**group

SOUTH PADRE ISLAND CVB FY19 FALL MEDIA OVERVIEW



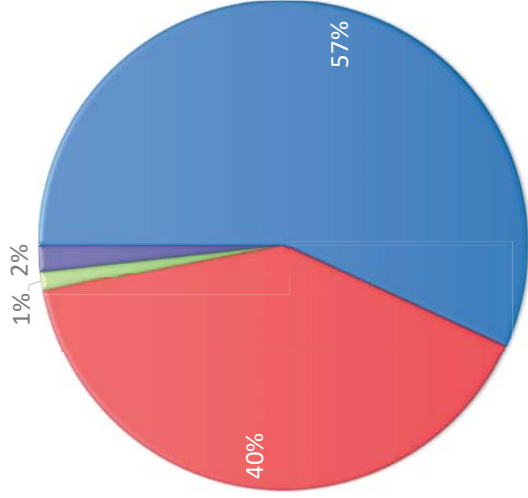
FY19: Leisure Fall Plan Overview

Targeting



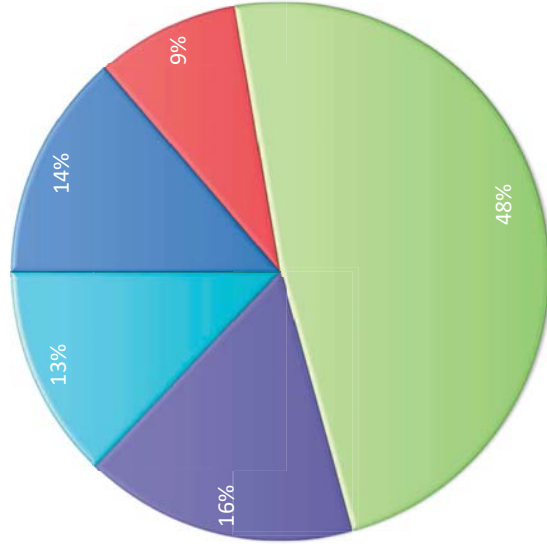
- Families w/ Young Kids (1, 1A)
- Empty Nesters (3)
- Winter Texans (4)
- Outdoor Enthusiast (7)

Media Mix



- Digital
- Print
- Radio
- Out-of-home

Market Priority



- RGV
- SA/Aus
- Texas
- Midwest
- Int'l

FY19: Creative Review



SO PERFECT. SO PADRE.

Fall is the perfect time to enjoy South Padre Island. Regardless of your travel interests — water sports, outdoor adventure, family fun, fishing & more — getting away to enjoy the Island life is exactly what you need.

Moderate temperatures and warm water coupled with light sea breezes makes for perfect vacation weather. So perfect. So Padre. Make it yours.

FALL STARTS HERE




Texas Monthly Travel Newsletter



**SO FUN.
SO PADRE**

Family adventure awaits on your own tropical island. South Padre Island. A place alive with fun, sun and endless good times. Make it yours at sopadre.com



Texas Monthly Fall Full Page

FY19: Creative Review



SO RELAXING.



Every year, visitors are drawn here by the warm sunshine and endless beaches. South Padre Island, the only tropical island in Texas, is the perfect winter escape to a beach made for strolling, fishing and catching beautiful sunsets.



sopadre.com/winter-texan

AARP Magazine Half Page

FY19: Creative Review



Texas Lakes and Bays Back Cover

Bird Watcher's Digest Full Page

FY19: Fall Plan Campaign Tracking (8/1-21)

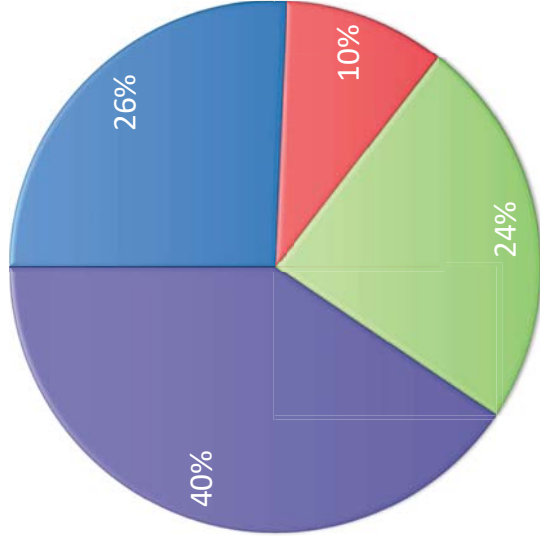


Industry CTR Benchmarks: SEM: 2.0% | Social: .78 | Device ID: .35% | Programmatic: .10%

Note figures above stated in %

FY19: Meetings Fall Plan Overview

Digital Mix



■ Search ■ Social ■ Eblasts ■ Programmatic

Fall Performance (8/1-21)



the **atkins** group

THANK YOU!

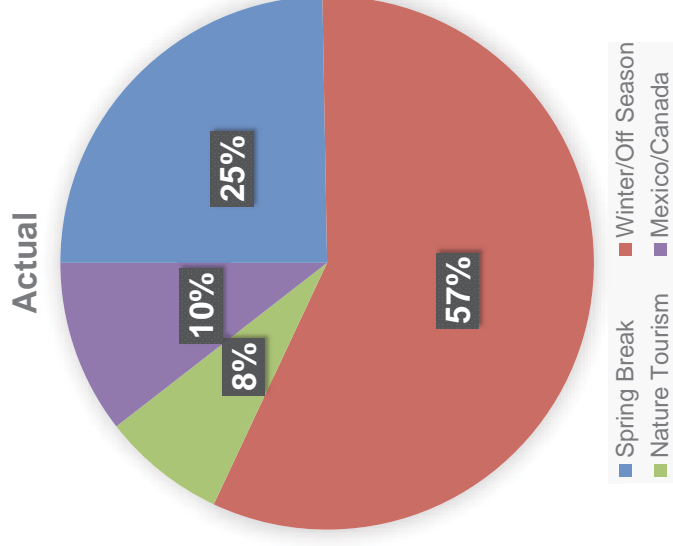
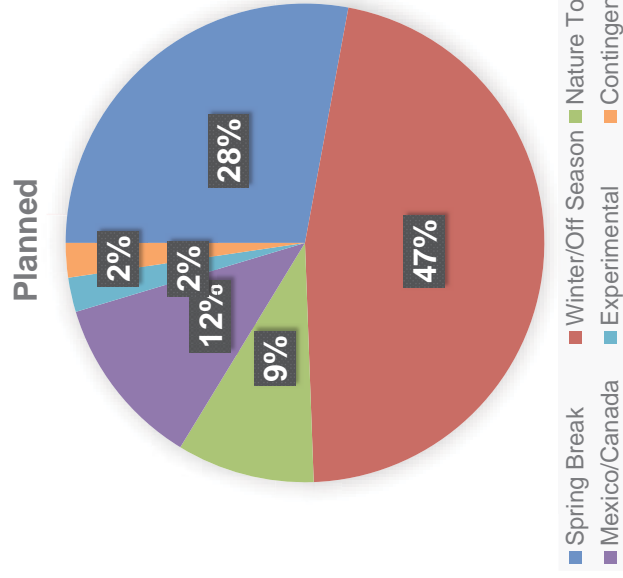


SOUTH PADRE ISLAND CVB FY20 MEDIA PLAN



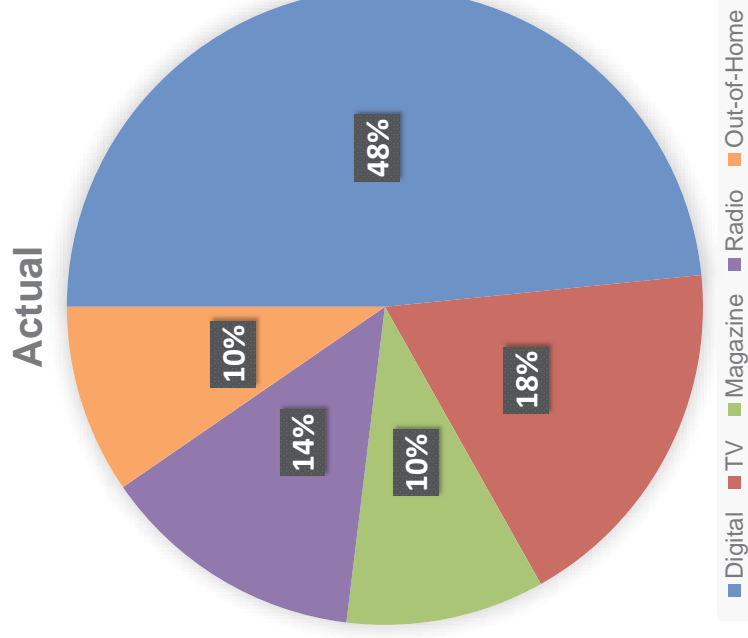
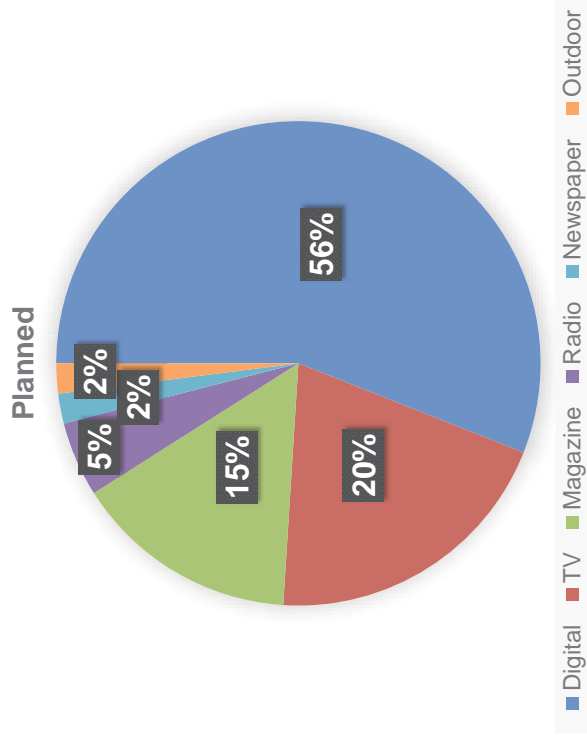
FY20: Oct-Mar Plan Overview

Targeting Mix



FY20: Oct-Mar Plan Overview

Media Mix



GEOGRAPHY

Tier I

- Base Market
- 1000+ Index
- **Upper RGV**
- **Laredo**

Tier II

- Established Markets
- 500-999 Index
- **San Antonio**
- **Austin**

Tier III

- Strength Markets
- 115-499 Index
- **15 Markets**
- **Rest of TX, OKC, Lincoln, NE**

Tier IV

- Growth Markets
- <105 Index
- **21 Markets**
- **Non-Texas**

Tier V

- Opportunity Markets
- <10 Index
- **New York, Phoenix, Seattle, SFO, Los Angeles**

GEOGRAPHY

Tier VI

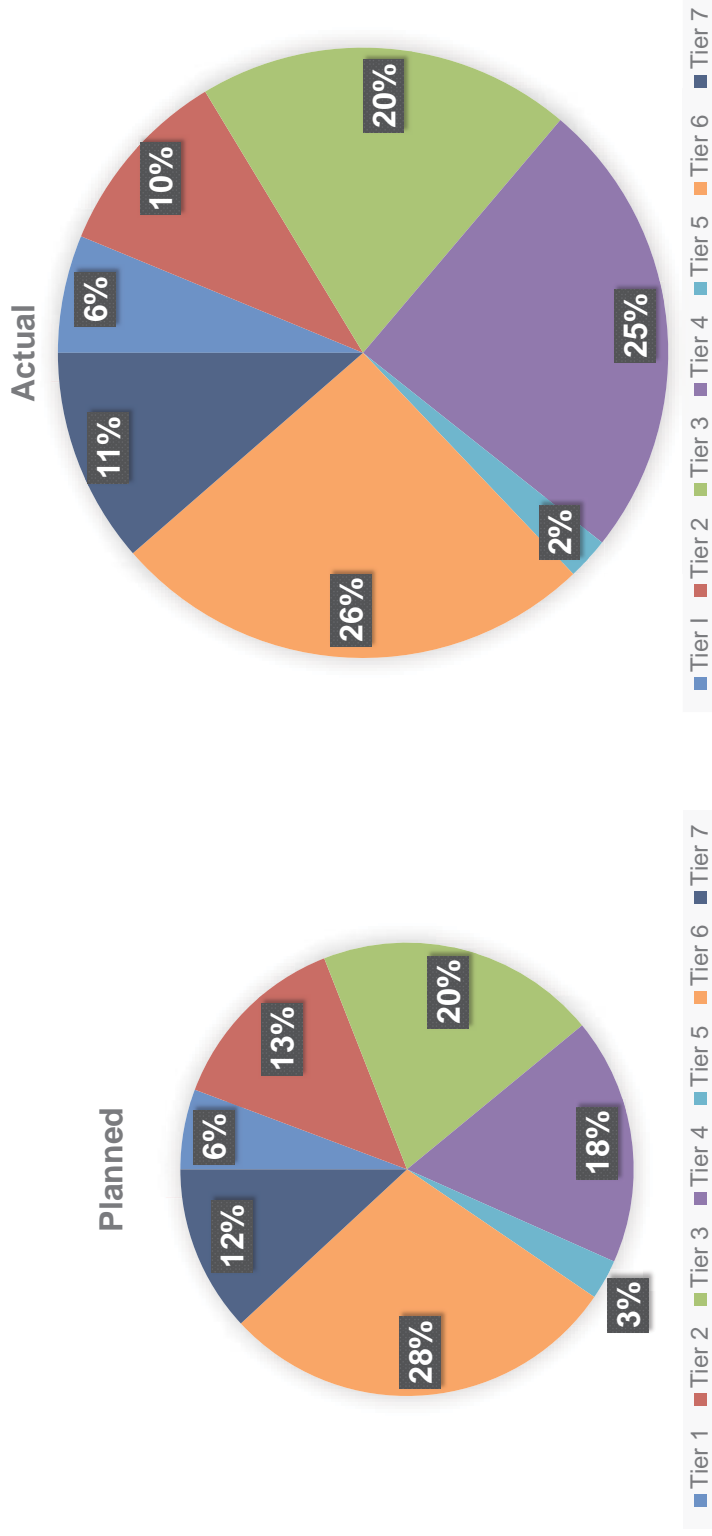
- Collegiate
- Midwest & Texas
- OK, MI, MO, KS, MN CO
- Geo areas based on roadshow list, Arrivalist data and Texas schools

Tier VII

- International
- **Mexico:** Reynosa, Tamaulipas, Garcia, Monterrey, Saltillo, San Nicolas, Guadalupe, San Pedro Garza, San Luis Potosi, Mexico City (neighborhoods)
- **Canada:** Toronto, Calgary, Vancouver, Winnipeg, Montreal
- Rationale based on Young Strategies

FY20: Oct-Mar Plan Overview

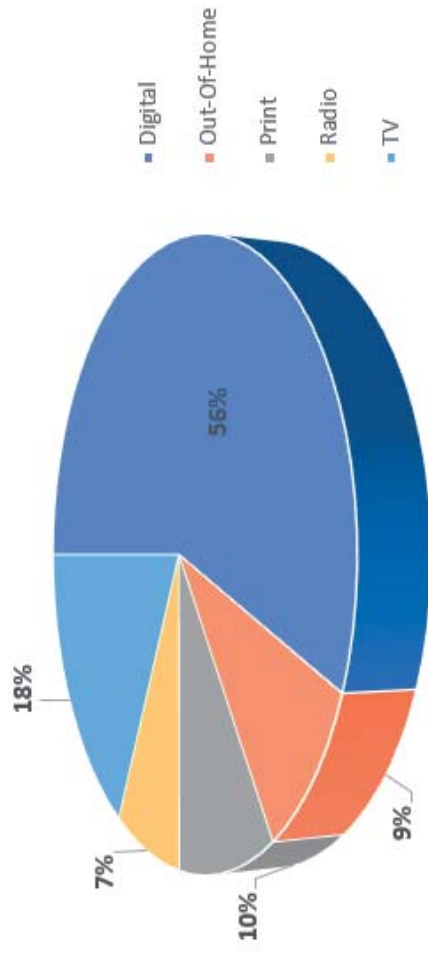
Market Allocation



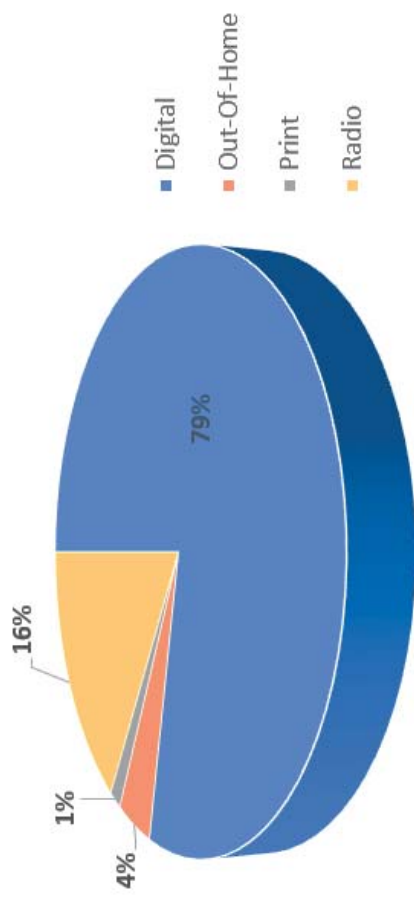
Tier 1 – RGV/Laredo; Tier 2 – San Antonio/Austin; Tier 3 – Rest of Tx (15 mkts) ; Tier 4 – Non-TX Growth (21 mkts); Tier 5 – Non-TX Opportunity (5 mkts); Tier 6 – Spring Break; Tier 7 - International

Media Mix: Winter/Off Season & Spring Break

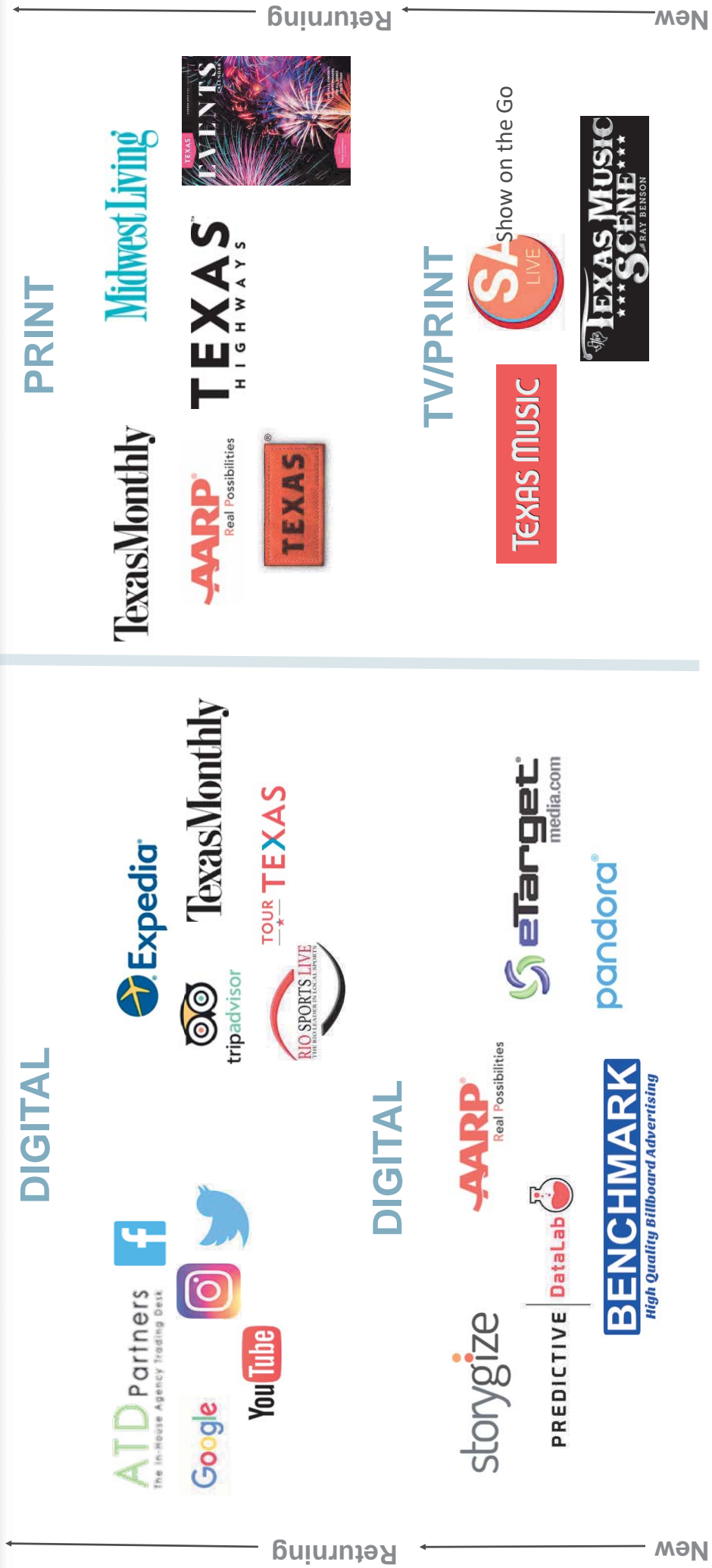
Winter/Off Season



Spring Break



Media Partners: Winter Off Season



Media Partners: Spring Break

New ← Returning



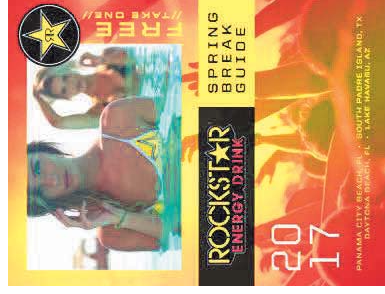
DIGITAL

ATD Partners
The In-House Agency Trading Desk

UberMedia



PRINT

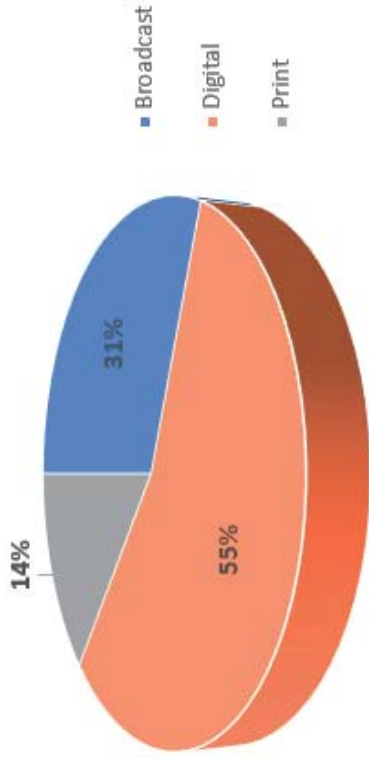


New ← Returning

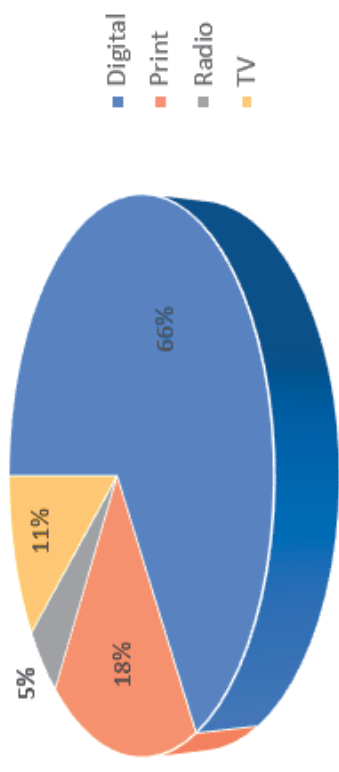
New

Media Mix (Oct-Mar): Nature Tourism & International

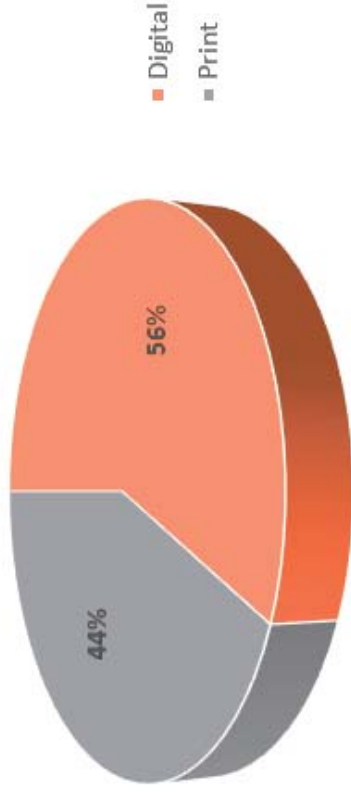
Nature Tourism



Mexico



Canada



Media Partners: Nature/Tourism

DIGITAL



PRINT



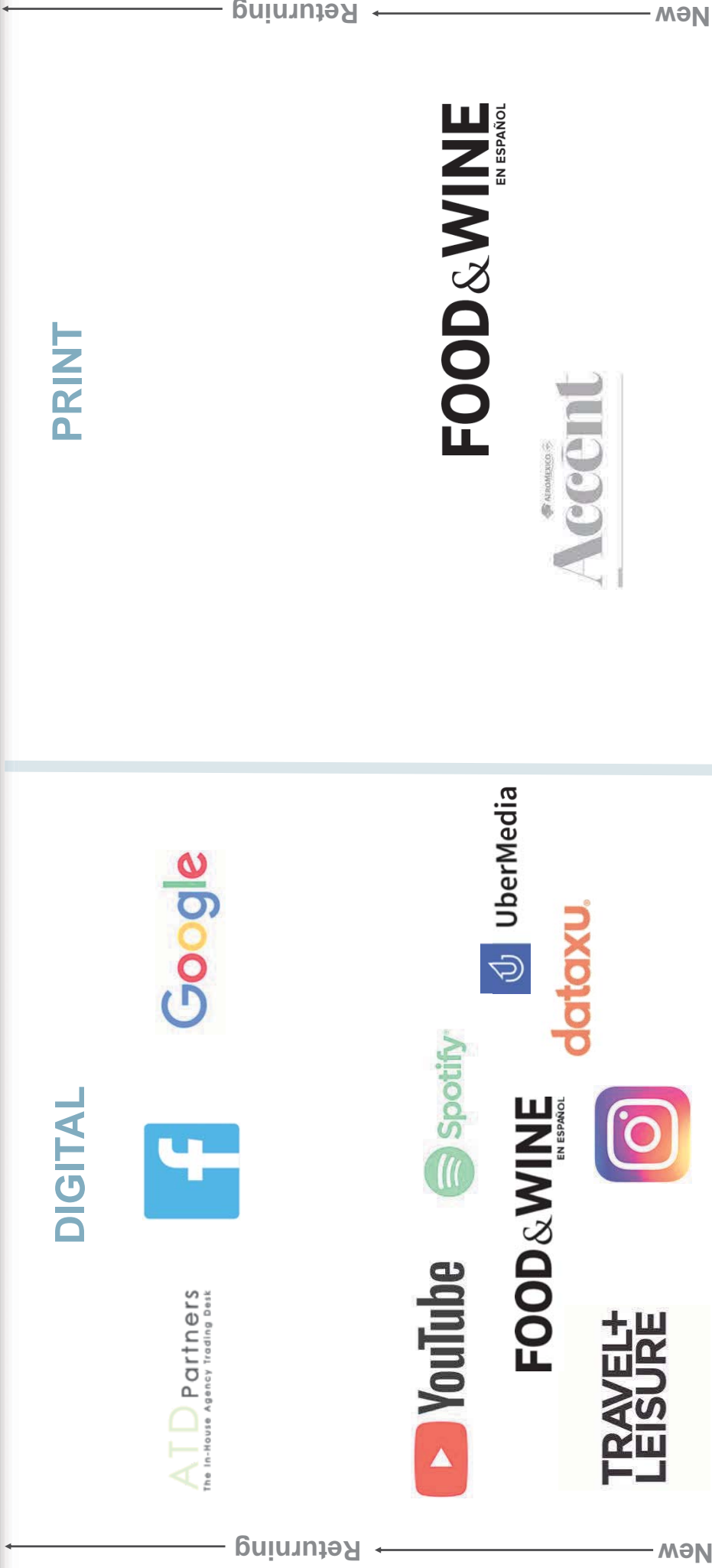
Returning

New

Returning

New

Media Partners: Mexico



Media Partners: Canada

DIGITAL

ATD Partners
The In-House Agency Trading Desk



UberMedia



CANADIAN
Traveller



PRINT

CANADIAN
Traveller



DREAMSCAPES
TRAVEL AND LIFESTYLE MAGAZINE

Returning

New

Returning

New

Spring Break Incremental

CONCEPT

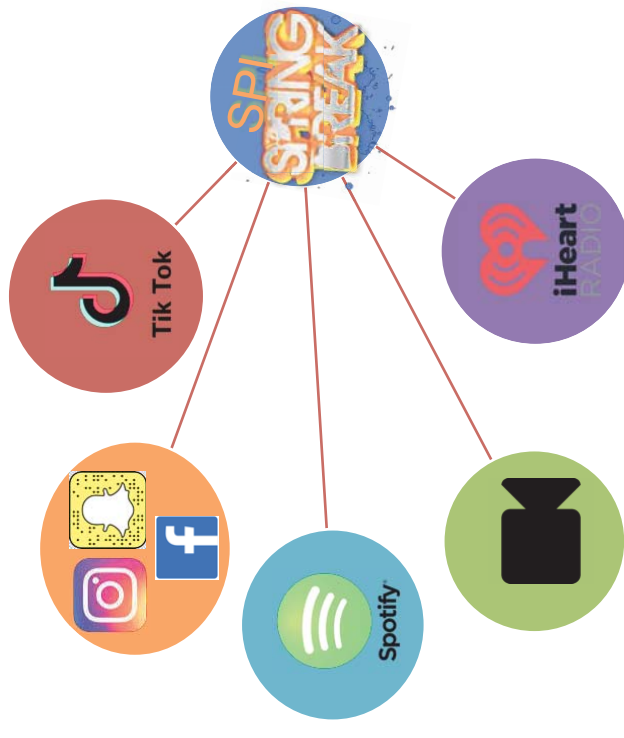
- Trip Giveaway/VIP Package
- Contest executed through media partner and mobile app Tik Tok.
- Contest executed through Tik Tok with a 50's/60's Beach Boogie Dance concept to modern music and tied to SPI Spotify playlist
- Participants pick a song from the playlist, perform a Beach Boogie dance move, and post on Tik Tok
- Top 8 videos with the most likes win the giveaway/VIP package

PRIZE PACK

- VIP Concert Pack
- 8 total trip giveaways.
- 4 each from Inertia/Isia Grand, and CMG/Clayton's/Hilton.
- Each prize will be for the winner and 3 friends. (4 total VIP passes)
- VIP access should include special event access/seating and possibly "Meet The Artist" opportunities.
- Prize package could include a room package/airfare, limo/party bus airport transportation.

MARKETING SUPPORT

- Create a Spotify Playlist
- Promote and fulfill through radio partner
- Develop "The Sounds of Spring Break" Spotify Playlist.
- Promote through social media platforms. (FB, IG, SC + Tik Tok, Spotify)
- TAG to support Inertia/CMG, and coordinate with their roadshow and city list.
- Brand video produced by TAG.
- Concept would be humorous, witty, and comical.



Fall Incremental: Midwest Enhancements

AARP.org

- AARP.org is the leading site for reaching mature affluent travelers.
- Target Great Lakes states
- Use display, video and social platforms

Storyize

- 70% of internet users would rather learn about products through content vs traditional advertising
- Contextually and key-word targeted campaigns across 156K publishers
- Display and video components

Pandora

- Mobile Welcome Interstitial through radio and streaming.
- Rich display unit that appears when the app is launched
- 1.26% click-thru benchmark for travel and tourism category

Addressable TV

- Offers ability to delivery unique executions to different streaming audiences
- Allows for relevant and impactful ad delivery
- Create customized audiences based on predictive modeling

Fall Incremental: Texas Enhancements

Texas Music Scene

- Features latest artists coming from the Texas music scene
- Syndicated across 61 markets, 18 Texas and 43 outside TX.
- Usually airs in late fringe time period
- Participation includes program sponsorship and integrated programs.

SA Live Show On the Go

- Leading lifestyle program airing on San Antonio's ABC affiliate (KSAT-TV).
- Sponsorship includes full program integration featuring several Island partners
- Sponsored program promoted across KSAT and MeTV
- Segments posted to KSAT's social, streaming and OTT platforms

Digital Bulletins

- Large format advertising offering ability to feature key events during off-season
- Run programmatically to secure efficient and targeted delivery
- Focus on top markets, Austin, Houston and DFW

Addressable TV

- Offers ability to delivery unique executions to different streaming audiences
- Allows for relevant and impactful ad delivery
- Create customized audiences based on predictive modeling

the **atkins** group

THANK YOU!



**CITY OF SOUTH PADRE ISLAND
ADVISORY BOARD MEETING
AGENDA REQUEST FORM**

MEETING DATE: August 28, 2019

NAME & TITLE: Chad Hart, Board Members

DEPARTMENT: Convention and Visitors Advisory Board

ITEM

Update and discussion regarding Spring Break 2020 marketing and advertising.

ITEM BACKGROUND

BUDGET/FINANCIAL SUMMARY

COMPREHENSIVE PLAN GOAL

LEGAL REVIEW

Sent to Legal: YES: _____ NO: x _____

Approved by Legal: YES: _____ NO: x _____

Comments:

RECOMMENDATIONS/COMMENTS

**CITY OF SOUTH PADRE ISLAND
ADVISORY BOARD MEETING
AGENDA REQUEST FORM**

MEETING DATE: August 28, 2019

NAME & TITLE: Chad Hart, Board Members

DEPARTMENT: Convention and Visitors Advisory Board

ITEM

Update and discussion regarding the Fall marketing & advertising push for the Rio Grande Valley and San Antonio.

ITEM BACKGROUND

BUDGET/FINANCIAL SUMMARY

COMPREHENSIVE PLAN GOAL

LEGAL REVIEW

Sent to Legal: YES: _____ NO: x _____

Approved by Legal: YES: _____ NO: x _____

Comments:

RECOMMENDATIONS/COMMENTS

**CITY OF SOUTH PADRE ISLAND
ADVISORY BOARD MEETING
AGENDA REQUEST FORM**

MEETING DATE: August 28, 2019

NAME & TITLE: Michael Flores, Director of Marketing Research and Analytics

DEPARTMENT: South Padre Island Convention and Visitors Bureau

ITEM

Discussion regarding CVAB support of the ConsultEcon phased proposal for a business plan for a South Padre Island "Nature Attraction".

ITEM BACKGROUND

The City Council tabled this project in December of 2018 pending an update of the CVAB and their similar RFQ. A dual split partnership between the CVAB and EDC would greatly benefit both agencies. The total cost of the project is \$52,000. The split cost at 50% will be \$26,000.

BUDGET/FINANCIAL SUMMARY

The current level of excess reserves in the Convention Centre fund is approximately \$1.8 million.

COMPREHENSIVE PLAN GOAL

LEGAL REVIEW

Sent to Legal: YES: _____ NO: x _____

Approved by Legal: YES: _____ NO: x _____

Comments:

RECOMMENDATIONS/COMMENTS

Approve funding for \$26,000.

October 17, 2018

South Padre Island Economic Development Corporation
South Padre Island Birding and Nature Center
6801 Padre Blvd
c/o Richard J. Franke
Sent via email to: richardsr@frankerealty.com

Re: Phased Proposal for a Business Plan for the South Padre Island “Nature Attraction”

Dear Mr. Franke:

ConsultEcon, Inc. is pleased to present this revised proposal to South Padre Island Economic Development Corporation and South Padre Island Birding and Nature Center to prepare a business plan for the proposed South Padre Island Nature Attraction including an aquarium and additional interpretive facilities on the same site as the current South Padre Island Birding and Nature Center. This proposal adds to our August 28 proposal additional consultant input regarding the types and scale of exhibits that would be most appealing for visitors, an outline program of spaces and an initial allowance for project capital costs. In addition to a largely indoor aquarium experience, the expansion could include an indoor butterfly garden; areas for wildlife demonstrations and talks, children’s nature center; botanical displays etc. Collectively these are referred to as a “Nature Attraction.” The business plan would be developed in three phases – Concept Development / Market Study, Operations Plan, then Economic and Fiscal Impacts Analysis. Each phase could be authorized sequentially.

This proposal includes a firm description, phased scope of services, optional tasks, fees and timing and contractual issues. Attached to this proposal we have included project qualifications in Aquariums and Nature Centers and also a review of some of our past assignments in the State of Texas.

FIRM DESCRIPTION

ConsultEcon, Inc. was established in 1991 to provide strategic economic and management advisory services to clients in visitor attractions, tourism, real estate, and community economic development. We specialize in aquariums, nature centers and other environmental and educational attractions. We have offices in Cambridge, MA and Jenkintown, PA. Our services include:

ConsultEcon, Inc.

- ◆ **Market and Financial Feasibility Studies:** Evaluation of the market support for and financial feasibility of visitor attractions and real estate development.
- ◆ **Management and Operational Analysis:** Evaluation of management and operational aspects of programs, projects, and plans; and analysis of alternative organizational models.
- ◆ **Business Plans:** Summary of the market demand, revenue potential and operating expenses of proposed development projects and investment plans.
- ◆ **Master Planning:** Evaluation of the market and operating impacts of master plan implementation to support design development and right sizing building plans.
- ◆ **Socio-Economic Impact Evaluations:** Analysis of the socio-economic impacts associated with project and program development and plan implementation.
- ◆ **Project Implementation:** Targeted strategies for achieving project and plan implementation.

How We Work

Our work in visitor attraction development typically focuses on issues related to visitation projections, facility pricing and marketing, operations, economic feasibility and project economic impacts. We work extensively with client representatives as well as architects, engineers and other related professionals on development planning and implementation. Our work sets the framework for other professionals in terms of facility use and visitation levels, seasonality of visitation, cost return trade-offs, and related issues critical to successful planning and implementation.

Industry Insight Developed Over Time

We maintain detailed industry data on an ongoing basis and call on our contacts and former clients in the attractions' industry to discuss their latest trends and emerging issues. Our substantial knowledge of market, financial and operational issues of visitor attractions nationally and internationally is the basis for our work. Our ongoing work and over 3,000 project reference files provide a vast body of information from which to draw comparable experiences, operating factors and to identify the approaches that are most effective. Our knowledge of the industry helps us to communicate effectively and efficiently with the client group, facility personnel and allied professionals. More information on ConsultEcon can be found on our website at www.consultecon.com.

Texas Experience

ConsultEcon, Inc. has completed 29 assignments for 18 development projects and plans in the State of Texas. Texas clients include the Trinity River Audubon Center in Dallas, the Texas State Aquarium in Corpus Christi, the Witte Museum and the McNay Art Museum in San Antonio, and the Museums of San Benito. Based on this experience we are familiar with the market and economic trends and attractions and tourism dynamics in South Texas, including the tourism context of South Padre Island.

Aquarium and Nature Center Experience

The firm has special expertise and experience in aquariums, nature centers, and other not-for-profit attractions focused on environmental education and interpretation.

Aquariums

We have completed over 80 assignments for new and existing aquariums, a special expertise of our practice. Our aquarium clients include those in large markets, such as the National Aquarium in Baltimore, Audubon Aquarium of the Americas in New Orleans, and the Virginia Aquarium in Virginia Beach, as well as smaller aquariums, such as the North Carolina Aquarium at Fort Fisher (Outer Banks); Mote Marine Laboratory in Sarasota, FL and the Maritime Aquarium in Norwalk, CT.

Nature Centers

Our extensive experience with avian, wildlife and other nature centers includes those that have incorporated aquarium exhibits into their visitor experience. Nature center clients have included the U.S. Fish and Wildlife Service, National Oceanographic and Atmospheric Administration, state and local Audubon Societies in Texas, Maine, New York, North Carolina, Missouri, Rhode Island, the Center for Coastal Studies in Provincetown, MA, Naples and Briggs Nature Center in Naples, FL, and the Dr. Nancy Foster Florida Keys Environmental Center in Key West, FL.

SCOPE OF SERVICES TO PREPARE BUSINESS PLAN

In order to assist you with this planning effort the work plan includes three major tasks:

- ◆ Task I: Concept Development / Market Study;
- ◆ Task II: Operating Plan; and,
- ◆ Task III: Economic and Fiscal Impacts.

Task I: SPI Nature Attraction Definition and Market Study

Task I-1. Project Initiation, and Review Project Objectives and Concept

Work in this task would focus on developing an understanding of the objectives for the SPI Nature Attraction, reviewing existing documents related to the project, facilitating a client workshop to create an expanded plan for a nature-based destination at the site; and define how the proposed attraction would be positioned in the marketplace. While in South Padre Island, we would review the proposed site as discussed in Task I-2 below; visit the Birding Center and other eco-tourism related sites in the area and conduct the project definition workshop. We will also review other changes and improvements in the local area that will affect future performance of the SPI Nature Attraction.

In this task, we will meet with you and other key project stakeholders, as appropriate, to establish more fully the context for the project.

Task I-2. Birding Center Operations Review

We will review attendance patterns, current budgets and historical operations of the South Padre Island Birding and Nature Center. As appropriate, this operating experience will inform the operating profile of the proposed SPI Nature Attraction.

Task I-3. Review Suitability of the Proposed Site

We will review the proposed site in South Padre Island for the SPI Nature Attraction from a market and economic perspective. The issues we would focus on would be:

- ◆ Market scale, especially the tourist population, seasonal residents and the resident population within a drive-time distance of the site.
- ◆ Site accessibility, visibility and traffic counts.
- ◆ Development context, parking availability, tourism infrastructure, and adjacent and nearby land uses; as well as proposed tourism development projects that are being planned for South Padre Island.
- ◆ Potential for collaborations with existing or proposed eco-tourism or other facilities.
- ◆ The site potential, from a market and operating perspective, to develop a successful and sustainable Nature Attraction.

Task I-4. Nature Attraction Project Definition Workshop

ConsultEcon will facilitate a half-day workshop that will review existing expansion plans, then identify possible additional nature-based attractions elements. These opportunities will then be evaluated for local relevance, educational and conservation benefits, popularity, uniqueness, markets served, seasonality, mutual support within the overall project, size and scale and conceptual cost among other factors. Once the preliminary project description is agreed upon, a concise written conceptual expanded project description as the “SPI Nature Attraction” will be prepared as the focus for the study and as a guide for future more detailed project planning and definition. After the market study tasks in 1.5, a refined project definition will be prepared in Task I-6.

Task I-5. Market Context

We will review the potential market segments for the proposed SPI Nature Attraction. This would include resident and visitor markets. Market segments might include:

- ◆ Local and regional residents
- ◆ Seasonal residents
- ◆ School groups
- ◆ South Padre Island tourists
- ◆ Visiting friends and relatives (VFR)

Task I-5a. Resident Market Evaluation - In this task, we will review and define the potential residential market reach for The SPI Nature Attraction, based on travel times and alternative activities. We would segment the residential market into primary, secondary and tertiary markets, as appropriate. We would analyze demographic characteristics of the markets including population, growth patterns, age profile and income. Beyond the resident market area, potential visitors will be evaluated in the tourism market analysis in the following task.

Task I-5b. Tourist Market Profile - In this task, we will review the visitor market segments to South Padre Island, including seasonal residents, beach vacationers, groups, and VFR's. Issues to be investigated may include: place of origin, length of stay, trip activities, accommodations, spending patterns, demographic characteristics and other such factors which will influence tourist response to the SPI Nature Attraction. Absent comprehensive quantitative data, we will interpolate from existing data. We will interview representatives of organizations involved in the tourism industry to better understand trends and market opportunities.

Task I-5c. Competitive Context and Regional Attractions Mix, and Future Area Trends - In this task, we will review the competitive environment for the proposed SPI Nature Attraction including both existing attractions and any proposed projects. In this task we will review, as data are available, the current mix of attractions in the area, including available data regarding attendance, admission pricing, visitor experience, programs, and other operating information.

Task I-5d. Review of Select Aquariums, Nature Centers and Butterfly Habitats - In this task, we will review several comparable Nature based attractions including aquariums, nature centers and butterfly habitats. We will focus on those with multiple experience types and/or facility size and location attributes. The particular locational and facility characteristics of the comparables will be cross-referenced to enhance the understanding and analysis of the proposed SPI Nature Attraction's definition, as applicable. A concise summary of market characteristics, annual attendance, types of exhibits, location context, facility size, and ticket prices will be prepared, as data are available. These data will be presented in summary tabular form, with a concise discussion of findings and lessons learned.

Task I-6. Refined Project Definition

Based on the nature attraction project definition workshop in Task I.4, and subsequent market research, a refined project definition will be prepared. It will include the following elements:

- ◆ a preliminary square foot program of spaces to include major indoor and outdoor areas, lobby, exhibits, retail and food service, back of house and other major spaces;
- ◆ a roster of most interesting, relevant and implementable exhibit topics and ideas to begin to describe the visitor's experience; and,

- ◆ a preliminary allowance for development costs to include: building construction, exhibits and fit-out; soft costs and pre-opening expenses. These will be based on our industry experience and typical ratios of expenses for square footages and hard costs.

Task I-7. Visitation Potential and Market Right-Sizing

Based on the findings of the previous tasks, the preliminary project definition, the client's goals and ConsultEcon's industry expertise, visitation potential estimates will be made for the SPI Nature Attraction. A recommended ticket price for the SPI Nature Attraction will be established based on its size and characteristics, the competitive context and project sponsor's goals. Based on the SPI Nature Attraction's visitation potential, preliminary physical planning guidelines will be prepared to include capacity requirements and to confirm the level of visitor services and parking required based on the SPI Nature Attraction's market potential ("right-sizing").

Task I-8. Market Study Report

We will prepare a concise Task I memorandum report of our findings based on work prepared in Tasks I-1 through I-7. We will present our findings to the client group in person or via teleconference or video conference as appropriate.

Task II: Business Plan

Task II-1. Refine Project Description

Based on Task I, as needed, we will support the client in refining the project's description as the basis for the SPI Nature Attraction's business plan.

Task II-2. Visitation Profile

The potential annual visitation to the SPI Nature Attraction will be evaluated by market segment, visitation mix (e.g. adults, children, school groups, programs, rentals, etc.). Ticket pricing issues will be explicitly included in this refined evaluation of visitation potential. A five-year visitation potential analysis reflecting early year high visitation patterns, stabilized visitation and long-term growth potential will be prepared.

Task II-3. Stable Year Earned Revenue Potential

In this task, the earned revenue potential for the SPI Nature Attraction will be evaluated. Optimum price levels will be determined based on physical capacity of the SPI Nature Attraction's program, the likely content of the visitor experience, seasonality, and the competitive context. These earned revenue projections will be input to the overall financial planning for the project. Based on our extensive experience in the attractions industry and adjusted for local conditions, we will estimate achievable per capita expenditures for admissions, associated retail / food service components of the SPI Nature Attraction, as appropriate, and develop assumptions regarding other potential sources of income i.e. education programs, events or facility rentals, upcharge opportunities, and memberships.

Task II-4. Stable Year Operating Expenses

Operating expense projections will be based on the SPI Nature Attraction's size, program, and local factors for utility costs, personnel, benefits, etc. A prototypical personnel plan will be prepared including industry based salary levels informed by local conditions, as appropriate. Optimum marketing expenditures will be estimated. The operating expense analysis will also include all relevant categories such as maintenance, insurance, cost of goods sold, supplies, administrative, etc. The experience of the existing birding and nature center may be an important data source for the operating expense analysis and will help to provide insights into how the proposed SPI Nature Attraction might be operated.

Task II-5. Operating Performance and Sensitivity Analysis

A set of five-year revenue and operating expense pro formas will be prepared for the SPI Nature Attraction. These will be presented along with detail tables and sensitivity analyses as annotated project operating pro formas along with accompanying notes and explanations. The focus of these evaluations will be on the long-term sustainability of operations. Any needs for non-earned revenues, such as gifts, grants, endowment proceeds, and other potential sources of outside support would be identified.

Task II-6. Summary Business Plan and Presentation, and Recommended Next Steps

We will prepare a concise Task II memorandum report of our findings based on work prepared in Tasks II-1 through II-5. We will present our findings to the client group in person or via teleconference or video conference as appropriate.

Task III: Economic and Fiscal Impacts

Task III-1. Visitor Spending Patterns

In this task, we would analyze available data on tourist market segments to South Padre Island, with a focus on traveler spending patterns to the extent that data are available. Data sources may include local and regional tourism organizations. Absent comprehensive quantitative data, we will interpolate from existing data. Assumptions regarding spending patterns of day-trip visitors to the SPI Nature Attraction will be made based on the available tourism data and the birding center's experience. These data would be a basis for the off-site direct spending for the economic impacts analysis.

Task III-2. Economic Impacts Due to Ongoing Operations

In this task, the ongoing annual economic impacts of operating the proposed SPI Nature Attraction will be analyzed. Impacts will apply to the defined local and regional economies. These analyses will include the direct impacts and multiplier effects for both the local and regional economies. In this task we will:

- ◆ Analyze total wages and salaries of employees.
- ◆ Analyze non-personnel operating budgets of the SPI Nature Attraction.
- ◆ Analyze the direct spending at the SPI Nature Attraction based on current attendee per capita pending estimates. Estimate net new direct off-site visitor spending and

by expenditure category. Categorize direct expenditures by sales tax status (taxable, untaxable).

- ◆ Use RIMS II multiplier techniques to estimate the indirect and induced economic activity generated annually due to visitor spending including person-years of employment, wages and salaries and total economic output. Indirect and induced impacts plus direct effects equals total impacts.

Task III-3. Fiscal Revenues Due to Ongoing Operations

In this task, the ongoing annual fiscal revenue generation due to the SPI Nature Attraction will be analyzed. These will include the direct taxes generated and those due to multiplier effects.

- ◆ Apply state and local sales and accommodations tax factors as appropriate to direct net new taxable sales that occur due to the operation of the SPI Nature Attraction.
- ◆ Apply estimates of the portions of total sales that occur in the local and regional economies. Attribute the appropriate portions of direct sales taxes to these jurisdictions and to the State as a whole.
- ◆ Apply appropriate state income tax multipliers to total direct wages and salaries from onsite operations and from employment directly supported by offsite spending to estimate total direct new state income taxes.
- ◆ Apply applicable State and local sales and income tax factors to net new employment and wages and salaries to estimate these taxes due to project multiplier effects.

Task III-4. Qualitative Assessment of Economic Benefits

A qualitative assessment will be made of the positive effects that the proposed SPI Nature Attraction has on South Padre Island, South Texas, and the State of Texas as a whole. These might include improvements to quality of life, educational benefits to regional students, environmental and conservation benefits, and publicity for the area and by serving as an anchor attraction for the area.

Task III-5. Final Draft Report

A concise final draft business plan report for the SPI Nature Attraction, incorporating work completed and refined from Task I, Task II, and Task III, will be prepared and submitted for review and comment. An executive summary suitable for separate distribution will also be included. Following a single round of review, a revised final business plan report will be issued and presented to the client group via video or conference call along with recommended next steps.

OPTIONAL TASKS

Other optional tasks could include working on additional lump-sum contracts, not-to-exceed variable hour contracts or on an hourly basis to make presentations, additional analyses and sensitivity analyses, evaluation of alternative SPI Nature Attraction development scenarios, evaluation of pre-opening costs, development cash flow analysis and other analyses that may be helpful to project planning and development.

CONTRACTUAL PROVISIONS: FEES AND TIME

The business plan can be completed in three phases or “tasks”. Task I is the Market Study, Task II is the Operations Plan, and Task III is the Economic and Fiscal Impacts Analysis. The fees for the tasks are as follows:

Task I - SPI Nature Attraction Definition and Market Study	\$31,000
Task II - Operations Plan	\$14,000
Task III - Economic and Fiscal Impacts Analysis	\$ 7,000

Up to three person-trips to South Padre Island are included at the outset of the study period and later in the study process as needed.

Direct costs such as travel, communications, report production, etc. will be billed in addition as incurred, but will not exceed 12 percent of the total study professional fee without prior client authorization. We will bill on a percentage complete basis, bi-weekly. We require a deposit of 25 percent of the professional fee of the authorized task to initiate work on the project (Task I- \$7,750; Task II- \$3,500; Task III- \$1,750). The deposit will be applied as a credit against the final invoices for each phase. Additional services will be separately contracted as required.

The time required to complete the work after contract execution and receipt of requested deposit is received is:

Task I - Market Study	7 to 9 weeks
Task II - Operations Plan	4 to 6 weeks
Task III - Economic and Fiscal Impacts Analysis	2 to 4 weeks

If multiple tasks are authorized at a given point in the process, total study period could be reduced as some of the work would be completed in parallel.

ACCEPTANCE

This proposal may be accepted by signing and returning one copy for the each study Task accepted f along with the deposit for the specified amount. The attached Standard Terms and Conditions are hereby incorporated by reference as a part of this submittal. We hope that this proposal is responsive to your needs. Should you feel any modification of the scope is desirable or have any questions, please do not hesitate to call.

We look forward to working with you and your team on this very interesting and important project.

Respectfully submitted,



Robert E. Brais
Vice President



James Stevens
Senior Associate

Task I

ACCEPTED BY:

DATE:

Task II

ACCEPTED BY:

DATE:

Task III

ACCEPTED BY:

DATE:

CONSULTECON, INC.'S STANDARD TERMS AND CONDITIONS

1. The Client's Responsibilities

1.1 The Client shall provide full information regarding the requirements for the Project. If the Project involves changes to an existing facility, the Client shall furnish accurate and complete information describing the existing conditions at the facility, including but not limited to plans, drawings, depictions, descriptions, and programs of spaces. The Consultant shall be entitled reasonably to rely upon the accuracy and completeness of the information provided in accordance with this Paragraph.

1.2 The Client shall furnish required information and shall render approvals and decisions as expeditiously as necessary for the orderly progress of the Services.

1.3 The Client shall designate a representative authorized to act in the Client's behalf with respect to the Project. The Client or such authorized representative shall examine the documents submitted by the Consultant and shall render decisions pertaining thereto promptly, to avoid delay in the progress of the Services.

1.4 The Client shall provide for the Consultant's right to enter from time to time, property owned by the Client and/or others so the Consultant may perform the Services.

1.5 The Client shall furnish all legal, accounting and insurance counseling services as may be necessary at any time for the Project including, without limitation, such legal services as the Client may require or the Consultant may reasonably request with regard to the applicability or legal interpretation of governmental laws and regulations.

1.6 If the Client observes or otherwise becomes aware of any fault or defect, or suspected fault or defect, in the Project or the Services, prompt written notice thereof shall be given by the Client to the Consultant.

1.7 The Client shall submit copies of proposed certificates or certifications, if any, to the Consultant for review and approval at least 14 days prior to the date that the Client desires the Consultant to execute them. The Client shall not request certifications that would require legal opinions or knowledge or services beyond the scope of the Agreement. All such certifications shall be limited to professional opinions rendered in accordance with generally accepted standards of professional practice.

1.7.1 The Client hereby agrees to reimburse the Consultant, without mark-up, for the reasonable costs incurred by the Consultant for legal counsel to review such proposed certificates or certifications. Such expenses, if any, will be included as a line item on the Consultant's monthly statement for Reimbursable Expenses and shall be paid by the Client within the time period specified in the Agreement.

1.8 The Client agrees to name the Consultant as an additional named insured on its Commercial General Liability (CGL) insurance policy(ies), if any, applicable to the Project and to provide the Consultant with a Certificate of Insurance evidencing compliance with this provision.

2. Confidentiality

The Consultant agrees to keep confidential and not to disclose to any person or entity, other than the Consultant's employees and consultants,

without proper consent of the Client, all data and information not previously known to and generated by the Consultant, or in the public domain, or furnished to the Consultant and marked "CONFIDENTIAL" by the Client in the course of the Consultant's performance of Services under the Agreement. These provisions shall not be interpreted to, in any way, restrict the Consultant from complying with an order to provide information or data when such order is issued by a court, administrative agency or other authority with proper jurisdiction.

3. Payments to the Consultant

3.1 The initial payment set forth in the Agreement, if any, is the minimum payment under the Agreement. It shall be credited to the last payment to become due on the Client's account.

3.2 If the Client disputes, in good faith, all or any portion of any statement from the Consultant for Services or Reimbursable Expenses, the Client shall notify the Consultant in writing within seven (7) days of receipt of the disputed statement, describing the nature of the dispute and including a reasonably detailed explanation of the reason for the dispute. The Client and the Consultant will attempt in good faith to resolve such disputes, if any. Amounts that are not in dispute shall be due and payable as provided in the Agreement.

3.3 Timely payments of amounts due for Services and Reimbursable Expenses shall constitute a condition precedent to the Consultant's continued performance of its obligations under the Agreement. If the Consultant so chooses, the Consultant may treat a failure of the Client to make timely payments to the Consultant as a suspension by the Client of the Consultant's Services. The Consultant shall notify the Client in writing if the Consultant chooses to treat late payments in the manner described herein.

4. Reimbursable Expenses

Reimbursable Expenses are in addition to the Consultant's compensation for Services and include actual expenditures made by the Consultant and the Consultant's employees in conjunction with the Services, for the expenses listed in the following Subparagraphs:

4.1 Expenses of transportation in connection with the Services (at a rate equal to current IRS guidelines for private automobile use); long distance communications; and fees paid for securing approval of authorities having jurisdiction over the Project

4.2 Travel and subsistence expenses

4.3 Expense of reproductions, postage, and handling of documents

4.4 Expense of data processing and photographic productions techniques

4.5 Expense of additional insurance coverage or limits, including professional liability insurance, requested by the Client in excess of that normally carried by the Consultant

4.6 Purchases of data and information.

5. Accounting Records

Records of Reimbursable Expenses and expenses pertaining to Services performed on the basis of time charges shall be kept and shall be

CONSULTECON, INC.'S STANDARD TERMS AND CONDITIONS

available to the Client or the Client's authorized representative at mutually convenient times.

6. Termination or Suspension of the Agreement

6.1 The Agreement may be terminated by either party upon written notice should the other party fail substantially to perform in accordance with its terms through no fault of the party initiating the termination.

6.2 If the Client suspends the Services, the Consultant shall be compensated for all Services performed prior to the receipt of written notice from the Client of such suspension, together with Reimbursable Expenses then due. If the Services are suspended for more than three months, the Consultant may at any time thereafter terminate the Agreement in accordance with Paragraph 6.1; the suspension in excess of three months constituting a failure substantially to perform by the Client.

7. Ownership and Use of Documents

All documents produced by the Consultant under the Agreement are instruments of service and the Consultant shall be considered their author and shall own and retain the copyright in them. The Client shall be entitled to own a copy of such documents and shall have a non-exclusive license to use, copy and reproduce them. Such license shall not be transferable except with the Consultant's written consent, and shall be irrevocable upon payment in full of all amounts due to the Consultant under the Agreement. The Consultant shall not be responsible for changes made in such documents by anyone other than the Consultant. The Client shall indemnify, hold harmless and defend the Consultant against all claims and liability arising out of such changes or uses by the Client in violation of the terms of the Agreement.

8. Mediation

8.1 All claims, disputes and other matters in question between the parties to the Agreement, arising out of or relating to the Agreement or the breach thereof shall be subject to mediation as a condition precedent to arbitration or the institution of legal or equitable proceedings by either party.

8.2 The Client and the Consultant shall endeavor to resolve claims, disputes and other matters in question between them by mediation which, unless otherwise mutually agreed upon by the parties shall be in accordance with the Construction Industry Mediation Rules of the American Arbitration Association then in effect. The request for mediation shall be filed in writing with the other party to the Agreement and with the American Arbitration Association. The request may be made concurrently with the filing of a demand for arbitration but, in such event, mediation shall proceed in advance of arbitration or legal or equitable proceedings, which shall be stayed pending mediation for a period of 60 days from the date of filing, unless stayed for a longer period by agreement of the parties or court order.

8.3 The parties shall share the mediator's fee and any filing fees equally. The mediation shall be conducted in Boston, Massachusetts, unless the parties mutually agree otherwise. Agreements reached in mediation shall be enforceable as settlement agreements in any court having jurisdiction thereof.

9. Miscellaneous Provisions

9.1 Unless otherwise specified, the Agreement shall be governed by the law of the Commonwealth of Massachusetts.

9.2 The person(s) signing the Agreement on behalf of the parties hereby individually warrant that they have full legal power to execute the Agreement on behalf of the respective parties and to bind and obligate the parties with respect to all provisions contained herein.

9.3 As between the parties to the Agreement: as to all acts or failures to act by either party to the Agreement, any applicable statute of limitations shall commence to run and any alleged cause of action shall be deemed to have accrued in any and all events not later than the completion of Services under the Agreement.

9.4 The Client shall only present the report(s), if any, prepared by the Consultant to third parties in their entirety. No abstracting of such report(s) shall be made by the Client without obtaining the Consultant's prior written permission.

9.5 The Consultant assumes no duty or responsibility under the Agreement that may be construed as being for the benefit of, and thereby enforceable by, anyone other than the Client. The Client shall not use report(s), if any, prepared by the Consultant in conjunction with any public or private offering of debt or equity securities without the Consultant's knowledge and prior written consent.

9.6 Unless otherwise specified, the Consultant agrees to provide the Client with one (1) draft report, to which the Client may make comments. Comments from this single round of review will be incorporated by the Consultant into the report document, as appropriate, and a final report will be issued.

9.7 This proposal is valid for 45 days from date of issuance.

10. Successors and Assigns

The Client and the Consultant, respectively, bind themselves, their partners, successors, assigns and legal representatives to the other party to the Agreement and to the partners, successors, assigns and legal representatives of such other party with respect to all covenants of the Agreement. Neither the Client nor the Consultant shall assign, sublet, or transfer any interest in this Agreement without the written consent of the other.

11. Severability of Provisions

In the event that any term or provisions of the Agreement or these Terms and Conditions is deemed by a court of competent jurisdiction to be overly broad in scope, duration or area of applicability, that court shall have the power and is hereby authorized and directed to limit such scope, duration or area of applicability, or all of them, so that such term or provision is no longer overly broad, and to enforce the same as so limited. Subject to the foregoing sentence, in the event any provision of the Agreement or these Terms and Conditions is held to be invalid or unenforceable for any reason, such invalidity or unenforceability shall attach only to such provision and shall not affect or render invalid or unenforceable any other provision of the Agreement or these Terms and Conditions.

12. Extent of Agreement

The Agreement and these Terms and Conditions represent the entire and integrated agreement between the Client and the Consultant and supersede all prior negotiations, representations, or agreements, either

CONSULTECON, INC.'S STANDARD TERMS AND CONDITIONS

written or oral, with regard to their subject matter. The Agreement and these Terms and Conditions may be amended only by written instrument signed by both the Client and the Consultant.

13. Limitation of Liability

13.1 It is understood and agreed that the Consultant can make no guarantees concerning recommendations made as part of the Services, since those recommendations must be based on facts discovered during performance of the Services and the conditions existing on the date the Services are completed and the recommendations rendered. The Consultant's compensation is neither dependent nor contingent upon specific conclusions or recommendations being made nor on the substance of the advice provided to the Client, if any, as part of the Services.

13.2 The Client and the Consultant intend that the Services in connection with the Project shall not subject the Consultant's individual employees, officers, or directors to any personal legal exposure for the risks associated with the project. Therefore, and not withstanding anything to the contrary contained in the agreement or these Terms and Conditions, the client agrees that, as the Client's sole and exclusive remedy, all claims, demands, and suits shall be directed and/or asserted only against the Consultant, a Massachusetts corporation, and not against any of the Consultant's employees, officers or directors.

13.3 Unless otherwise provided in the Agreement, the Consultant and the Consultant's consultants shall have no responsibility for the discovery, presence, handling, removal or disposal of or exposure of persons to hazardous materials in any form at the Project site, including but not limited to asbestos, asbestos products, polychlorinated biphenyl (PCB) or other toxic substances.

13.4 The Client understands and acknowledges that the Consultant and the Consultant's consultants have no authority over, or responsibility for, the means, methods, techniques, sequences or procedures of design, construction or operation selected by the Client or facility operators or for the failure, if any, of any designer, construction contractor, or facility operator to comply with the laws, rules, regulations, ordinances, codes and/or orders applicable to the construction work performed by such contractor(s). The Consultant is not responsible for the effectiveness or results of the design, development, construction or operation of the facility.

13.5 It is agreed by the Client that the Services under the Agreement are not to be used in conjunction with any public or private

offering of debt or equity securities without the Consultant's prior knowledge and written consent, such consent will not be unreasonably withheld. The Consultant shall not be responsible for any documents or offerings that it may be attached to or referenced in documents prepared by the Consultant. It is agreed that the client will indemnify and hold the Consultant harmless against any losses, claims, damages and liabilities under federal and state securities laws that may arise as a result of statements or omissions in public or private offerings of securities.

13.6 It is agreed by the Client that the report will be presented to third parties in its entirety and that no abstracting of the report will be made without first obtaining the Consultant's consent which will not be unreasonably withheld.

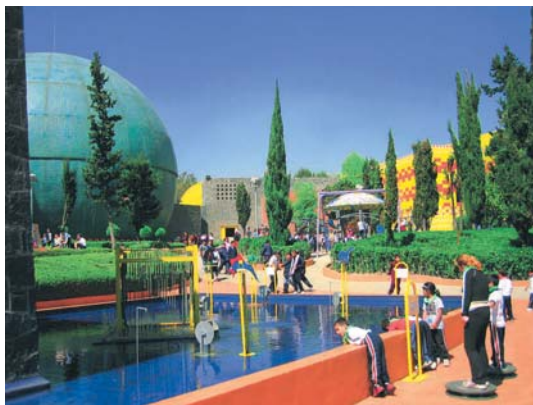
13.7 The Client and the Consultant have discussed the Client's risks, rewards and benefits associated with the Services and the Consultant's risks and total compensation for Services. The Client and the Consultant have allocated the risks such that the Client hereby agrees that, to the fullest extent permitted by law, the Consultant's total liability to the Client and all others for any and all injuries, claims, losses, costs, expenses, damages (including consequential damages), or claim expenses arising out of the Agreement or its breach, from any cause or causes shall not exceed the total amount of Fifty Thousand Dollars (\$50,000). Such causes include, but are not limited to, the Consultant's negligence, errors, omissions, strict liability, breach of contract, and breach of warranty, as well as violation of federal or state securities laws regulating statements or omissions in public and private offerings of securities.

13.8 The Client agrees to defend, indemnify and hold the Consultant harmless from all claims for liability in excess of the limits set forth in Paragraph 13.7, above, for injury or loss sustained or alleged by any person or entity, whether or not a party to the Agreement, and allegedly arising out of the Consultant's performance of Services under the Agreement.

13.9 Since it would be unfair for the Consultant to be exposed to liability for its failure to perform a service that the Client has either refused to authorize or has instructed the Consultant not to perform, the Client hereby waives all claims against the Consultant and agrees to defend, indemnify and hold the Consultant harmless from claims or liability for injury or loss allegedly arising from the Consultant's failure to perform a service that the Client has either refused to authorize or has instructed the Consultant not to perform.

ConsultEcon, Inc.

Economic and Management Consultants to the Attractions Industry



We position clients for success.

ConsultEcon, Inc. is an economic research and management consulting firm serving the museum, attractions, and tourism industry domestically and internationally. We specialize in providing consulting and advisory services for new museums and for renovations and expansion of existing museums and attractions.

Our market and economic studies have been the basis for major investments and organizational improvements in museums, attractions, and performance venues. Outcomes based on our objective project reviews include site selection, project justification, planning development strategies, operating plans, and project funding.



ConsultEcon, Inc. photo of Papalote Museo del Niño.

Our clients benefit from the breadth of our practice that includes all types of museums, aquariums, zoos, performing arts, cultural districts, heritage parks, and comprehensive master planning. We serve large and small museums, established institutions, and start-ups. The firm maintains strict standards for each assignment to ensure that our work is timely, accurate, and respected by clients, funders, professionals, and public reviewers.

- **Business Planning** - Plans for existing and new museums and attractions.
- **Feasibility Studies** - Evaluation of market support and financial feasibility.
- **Alternative Site Selection** - Evaluation of alternative sites for museums and attractions.
- **Operations Evaluation** - Evaluation of management and operations to achieve strategic solutions.
- **Economic Impacts** - Economic and fiscal impacts of museums and attractions.
- **Primary Market Research** - Visitor evaluations for program content, pricing, and interpretive approach.



ConsultEcon photo of Aquaria Vattenmuseum in Stockholm.

- **Project Reviews** - Independent project evaluations for leadership and funders.
- **Master Plans** - Site and market analysis, operating plans, and sensitivity analysis for single and multiple use sites.
- **Expansion Plans** - Analysis of potential visitation and operations impacts.
- **Pre-Opening Planning** - Development of pre-opening plans including operating expenses, programming, timing of staff hires, and cash flow.
- **Real Estate Evaluations** - Rent, valuation, and feasibility analysis for museum properties.
- **Tourism Development** - Local, regional, and statewide strategies for developing and increasing visitation.

We have a successful track record working with attraction operators.



Source: http://www.hab.gov.hk/en/policy_responsibilities/Culture/wkcd.htm

We prepared economic feasibility evaluations for five new cultural facilities to be developed as part of the **West Kowloon Cultural District** in Hong Kong, SAR.



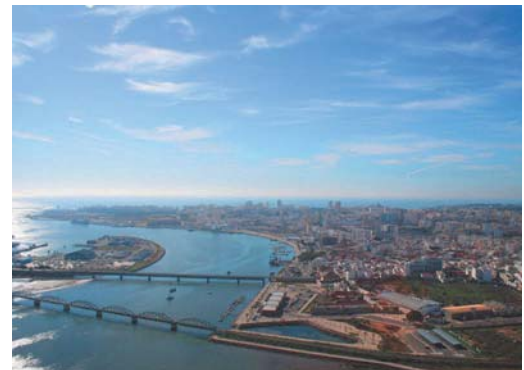
ConsultEcon photo of Oceanário de Lisboa

We worked with the **Oceanário de Lisboa** in evaluating alternative changing exhibit strategies to broaden their market reach and increase earned revenue potential.



Source: <http://www.alraidah.com.sa/sites/en/Investments/pages/KAFDProject.aspx>

We prepared a preliminary operating business plan for the **King Abdullah Financial District Science Museum and Geo-Climat Centre and Aquarium** in Riyadh, Saudi Arabia. The projects are under construction.



Courtesy of Promontorio Architects.

We prepared market and economic feasibility evaluations for a series of visitor attractions to be developed as part of the **Portimão** waterfront redevelopment plan in the Algarve, Portugal.



ConsultEcon photo of Papalote.

We prepared a feasibility study for a potential new attraction as part of the **Papalote's** larger operation in Mexico City.



ConsultEcon photo of Monterey Bay Aquarium.

For the **Monterey Bay Aquarium**, we evaluated the market potential and operational implications of expansion alternatives.

Representative ConsultEcon Projects

Business Planning

Virginia Museum of Fine Arts
Cavanaugh Flight Museum
Cherokee Heritage Museum
Desert Discovery Center
Mid-America Science Museum
Monterey Bay Aquarium
National Flight Academy
Tampa Museum of Art
Trinity River Interpretive Center

Feasibility Studies

Arizona Historical Society
at Rio Nuevo
Audubon Ark Tour Boat
Boston Marathon Museum
Center for American Music
Danville Science Center
Darwin Martin House
Figge Art Museum
International Museum of Women
Las Vegas Springs Preserve
Museum of the Cherokee Indian
Mt. Beacon Incline Railroad
Nevada Discovery Museum
Rachel Carson National
Wildlife Refuge
River Heritage Museum
Sandy Neck Beach Park
Interpretive Center
Suffolk African American
Heritage Museum
Tivoli Gardens (Copenhagen)
Toronto Aquarium
USS Saratoga Museum
Virginia Aviation Museum

Alternative Site Selection

Finger Lakes Museum
Center for Technology & Innovation
Eagles Mere Museum
H.L. Hunley Museum
Schenectady Museum

Operations Evaluation

Arvada Center for Arts
and Humanities
California Science Center
Goodspeed Opera House
Nauticus National Maritime Center
Old Cowtown Museum
Pink Palace Family of Museums
Louisiana State Museum

Economic Impacts

Miami Science Center
Taltree Arboretum and Gardens
Belmont Bay Science Center
National Museum of the
Marine Corps
Santa Cruz Museum of
Natural History
University of Arizona Science Center
Science Museum of Virginia

Primary Market Research

Health Adventure
Indianapolis Zoo and Gardens
Mystic Aquarium's Institute for
Exploration
National Aviary
Oklahoma Music Hall of Fame
Olana State Historic Site

Project Reviews

American Revolution Center
Heritage Harbor Museums
Massachusetts Museum
of Contemporary Art
Railroad Museum of New England
USS Iowa Museum

Master Plans

Canoa Ranch Heritage Park
Boston's Freedom Trail
Buffalo Zoological Gardens
Fort Adams in Newport, RI
Gettysburg National Military Park
Jamestown / Colonial National
Heritage Park
Laumeier Sculpture Park
Minnesota Zoo
National Aviary
New York Aquarium
Niagara Parks, Canada
NOAA National Marine Sanctuary
Visitor Center Strategy
Oklahoma City Zoo
Oil Region Heritage Park
Plattsburgh Barracks History Center
Red Mountain Park
Saratoga Historic Battlefield
Tucson Origins Heritage Park
U.S. Mint Museum
Virginia Aquarium and Owls
Creek Area Plan
West Kowloon Cultural District

Expansion Plans

California Academy of Sciences
California Science Center
Chicago Children's Museum
Cleveland Botanical Garden
Conservancy of Southwest Florida
John G. Shedd Aquarium
Minnesota Museum of Art
National Mississippi River
Museum and Aquarium
Museum of Discovery and Science
Norwalk Maritime Aquarium
Ohr-O'Keefe Museum of Art
Sloss Furnaces National
Historic Landmark
Texas State Aquarium
Virginia Aviation Museum
U.S. Grant Interpretive Center

Pre-Opening Planning

Sunnylands
History Museum of the Upcountry
Miami Art Museum
Jepson Center for the Arts at the
Telfair Museum of Art
Virginia Museum of Fine Arts

Real Estate Evaluations

Providence Bomes Theatre
Greylock Glen
Environmental Center
Monterey Bay Aquarium
Birmingham Railroad
Reservation Park
Waimea Falls Park, Oahu

Tourism Development

Augusta Canal National
Heritage Area
Bethlehem Landing Visitor Center
Hudson River Valley Tourism Plan
Long Island Wine Visitor Center
Motor Cities National Heritage Area
Ohio and Erie Canal
National Heritage Corridor
San Antonio Visitor Center
Seneca County (New York)
Tourism Plan
Thames River Heritage Park
Town of St. George Bermuda
Undreground Railroad Interpretive
Center at Niagara Falls
Wheeling National Heritage Area

ConsultEcon, Inc.

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ConsultEcon, Inc. (CEI) provides services to clients in the areas of strategic and management consulting, project and plan concept development, market and financial feasibility, business planning, socio-economic evaluation and project implementation.

The staff of ConsultEcon, Inc. have conducted numerous market support, financial feasibility, business plans, and economic impact evaluations for aquariums, zoos and nature centers. This work has resulted in the successful implementation of many projects in cities such as Osaka, Japan (**Kaiyukan Ring of Fire Aquarium**), Genoa, Italy (**Acquario di Genova**), Chattanooga (**Tennessee Aquarium**), and New Orleans (**Aquarium of the Americas**). CEI staff have also conducted work on many successfully developed aquariums, including projects in Lisbon, Portugal (**Oceanario de Lisboa**) and Kuwait (**Scientific Center and Aquarium**).

The firm maintains extensive Project Reference Files to assist us with our work. Much of this work has been in multi-disciplinary settings where associated professionals have worked to develop projects, or to generate process-oriented solutions to complex development problems through market, management, and implementation-oriented plans. Many of our clients' projects have been successfully implemented.

The following are typical of assignments for aquariums, zoos, environmental and nature centers.

Shedd Aquarium Expansion: Chicago, Illinois –

Performed work on major expansion for the Shedd Aquarium in Chicago that included market and financial evaluation of alternative program development. The project has been successfully implemented.



Source: ConsultEcon, Inc.

Underwater World: Singapore – Worked with representatives from the Aquarium and Haw Par Corporation to develop an economic impact statement showing the importance of a proposed new and expanded project to Singapore's economy, particularly tourist economy. CEI reviewed the site and economic impact of other aquariums to provide industry benchmarks.

Alexandria Aquarium: Alexandria, Egypt – Prepared preliminary review of the market potential of an aquarium as part of a larger mixed-use development in Alexandria.

Dubrovnik Aquarium: Dubrovnik, Croatia – Prepared a market and economic feasibility study, as well as economic impact evaluation, for a major new aquarium attraction to be developed on the Dubrovnik waterfront.

Monterey Bay Aquarium Expansion Master Plan: Monterey, California –

Prepared market projections and financial forecasts for a ten-year Aquarium master plan. CEI reviewed various approaches including reconfiguring existing exhibits and adding a new wing with new exhibit content, and evaluated the potential market support and operational implications of alternative scenarios, including staging approaches and construction impacts associated with plan implementation.



Source: Monterey Bay Aquarium.

Indianapolis Zoo Great Ape House Expansion: Indianapolis, Indiana – Assisted the Indianapolis Zoo in evaluating the site, market, operating and economic impact potential of a major Great Ape House expansion on the existing zoo operation. As part of this work, CEI assessed the current operating profile of the zoo, building on baseline information developed during earlier phases of master planning work CEI conducted for this client over a number of years. CEI reviewed comparable expansion projects on other zoos and aquariums to provide benchmarks for the proposed expansion. This project recently opened.

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Oceanario De Lisboa Privatization: Lisboa, Portugal –

The Portuguese government had prepared a tender for privatization of this national aquarium which is one of the largest and most attended of European aquariums. A variety of public and private organizations bid on the opportunity. ConsultEcon advised the team which won the competition. This work included an analysis of Oceanário De Lisboa attendance, revenue and operations compared to benchmark demographic and operating data for comparable aquariums to evaluate economic

sustainability and future opportunities.

An aquarium design team evaluated these opportunities as well

as needed aquarium reinvestment.



Source: Visit Portugal

Opportunities in operating model, marketing, visitor experience and auxiliary retail and food service were identified. These were inputs to ConsultEcon's market and economic projections which were the basis for the accepted financial bid.

Clearwater Marine Aquarium: Clearwater, Florida -

Evaluated the operating potential of the proposed expansion of Clearwater Marine Aquarium's Island Estates facility in Clearwater, Florida. This work included a site review, and a summary of current attendance patterns, seasonality, and visitor profiles and current personnel and baseline operations. A parking sufficiency analysis was prepared for the structured parking that will be developed in phases with the aquarium improvements. A review was conducted of other comparable facilities, as well as local competitive and complementary attractions. A market study of potential resident, tourist and educational markets was conducted. For the Master Plan a projection was prepared of attendance year by year as the master plan was implemented. Then, for each year full revenue by type and expanding organization personnel and operating expense budgets were prepared.

London Zoo: London, England - This project reviewed potential attendance at an enhanced London Zoo.

Milford Aquarium: Milford, Delaware – Evaluated the feasibility of a proposed aquarium in Milford, Delaware. The aquarium, proposed as a part of a large-scale, mixed-use development, will be the first large-scale public aquarium in the State, adding significant value to the existing tourism infrastructure in Coastal Delaware. The analysis included a review of the project's concept and alternative sites, a summary of aquarium success factors and benchmarking data for small- and mid-sized aquariums, a review of the competitive context for aquariums on the mid-Atlantic coast and local tourist attractions, a summary of resident market demographics and tourist market characteristics, and an economic model projecting attendance and operating characteristics of the proposed Aquarium, and an analysis of the economic impact of the Aquarium on the State and local Counties.

Crystal River Aquarium: Crystal River, Florida –

Evaluated the feasibility of developing a mid-scale, regional destination aquarium and manatee rehabilitation facility, as an extension of the One Rake at a Time initiative, an existing environmental conservation effort that arose from within the community. Working closely with community stakeholders, CEI evaluated a proposed site, and gave guidance on concept and project development from a national benchmarking perspective, as well as a local market perspective. Attendance projections and operating potential were prepared, and an analysis of economic and fiscal impacts of project development.

Albuquerque Bio Park: Albuquerque, New Mexico –

Provided input to a Master Plan that included an assessment of the current operating profile, as well as the future operating potential given an enhanced product and expanded revenue streams as part of a multi-disciplinary team. Conducted resident and tourist market analysis, review of the experience of local visitor attractions, and that of similar attractions' operations and expansion programs. Input included market appeal, attendance and ticket price impacts, revenue potential and operating costs associated with various redevelopment and expansion options and phasing considered in the planning process.

Aquarium and Zoo Qualifications

Lake Superior Zoo/Fairmount Park: Duluth, Minnesota

– Working with the City of Duluth and non-profit Zoological Society, ConsultEcon assisted in developing and evaluating alternative capital investment scenarios for improving the Zoo visitor experience and repositioning the Zoo and Park as a natural history, environmental education and adventure oriented education and recreation community and tourism destination. The Zoo and larger Park are located within 10 minutes from downtown, yet have extensive natural features. The project involved stakeholder meetings, market research, a planning workshop and evaluation of multiple scenarios.

North Carolina Aquarium at Fort Fisher: Fort Fisher, North Carolina – Retained by the North Carolina Aquarium at Fort Fisher to evaluate the potential relocation of the aquarium to a downtown location in Wilmington. CEI’s work included a review of the existing



Source: NC Aquariums

operations at the aquarium, an evaluation of the proposed downtown

site for market and development potential, an analysis of resident demographics and tourist market characteristics. A preliminary attendance projection was prepared, as well as an operating plan for the aquarium at the new proposed site, and next steps were recommended.

First Coast Aquarium: Jacksonville, Florida: - Provided market feasibility, operating business plan, and economic impacts evaluation for an aquarium in Jacksonville that is expected to be a major catalyst for waterfront development. CEI evaluated the site, competitive context, potential resident and tourist markets, preliminary attendance and aquarium right-sizing. This work helped to define the project. Next, a full feasibility study was conducted including attendance potential, visitation by type, ticket pricing, earned revenue potential, personnel plan, operating expense estimates by type and summary of fundraising requirements for operations and net income potential. Finally CEI prepared an analysis of the aquarium’s economic impacts on Jacksonville and the State of Florida as a whole.

Save the Bay Exploration Center and Aquarium: Newport, Rhode Island

– Retained by Save the Bay to evaluate the potential relocation of the Exploration Center and Aquarium from its current beachfront site to a downtown location. CEI’s work included a review of current Save the Bay operations (including both Exploration Center and other facility operations), an analysis of local resident and tourist markets to Newport, an evaluation of three downtown sites, as well as five other sites in and around Newport. An estimated attendance potential was prepared for a downtown site and next steps were recommended.

Gulf Coast Community Foundation: Punta Gorda, Florida

– Conducted market and economic potential analysis of a proposed Aquarium in Charlotte County. Work included a review of several sites, with analysis of accessibility, visibility, layout, adjacent and nearby land uses, nearby attractions, parking, public transportation, and zoning/ land-use considerations, as well as available visitor services and amenities. Area resident and tourist markets were defined, and a review of local and comparable attractions was conducted. Potential attendance and physical planning parameters were estimated, along with operating revenue and expense projections.

Mazatlán Aquarium: Mazatlan, Sinaloa, Mexico

– Evaluated the feasibility of expanding an existing major aquarium in a major vacation destination on Mexico’s west coast. The existing aquarium was built in 1980, and master plan improvements were conceptualized to help reposition and renew Mazatlán’s identity as a tourism destination. Work included an evaluation of existing operations at the Aquarium; a review of proposed master plan concepts; an analysis of market factors, including resident market demographics, tourism statistics, competitive attractions, and the cruise travel patterns in the area; and a review of comparable aquarium operations worldwide. A right-sizing analysis was conducted, and estimates of required capital investment were made to optimize development and future operations at the aquarium.

Indianapolis Zoo Master Plan: Indianapolis, Indiana –

Prepared the market, financial and economic portions of ten-year master plan for the Indianapolis Zoo. A wide array of potential investments was weighed, including new animal exhibits, participatory activities, and visitor infrastructure. Focused group sessions with area consumers provided key insights to the planning process.

Siam Ocean World: Bangkok, Thailand –

Prepared a review of historical operating performance and market assessment that informed our five-year attendance and operating analysis for the existing aquarium in Thailand. This included a review of the competitive environment for the aquarium and its planned improvements, as well as its context of being located within a shopping center.

Minnesota Zoo Master Plan: Minneapolis, Minnesota –

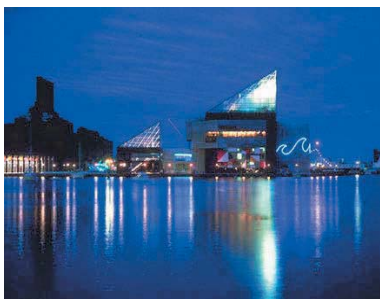
Prepared market, financial and business plan. The work included evaluating the current operating profile as well as future operating potential of the Minnesota Zoo, given an enhanced product and increased revenues. Of particular importance in this effort was the evaluation of the mix of new exhibits and infrastructure that will best serve the zoo's economic needs and mission.

Melbourne Aquarium: Melbourne, Australia –

Evaluated an expansion plan for the aquarium for their penguin exhibit, developed as part of a major expansion of the aquarium. CEI developed an assessment of the market and operating potential for the aquarium over a five-year period.

Expansion of the National Aquarium in Baltimore, Maryland –

Evaluated the operating profile, market potential and financial results of major renovations and



Source: Cambridge Seven Associates

expansion plan in the design phase for the National Aquarium in Baltimore. Key concerns included construction impacts, payback against capital expenditures, and operating efficiencies.

Texas State Aquarium Expansion: Corpus Christi, Texas –

Conducted market feasibility study of potential expansion of Texas State Aquarium with a new dolphin wing. The work included



Source: Texas State Aquarium

Aquarium baseline

analysis, a review of expansions at other comparable facilities, market segmentation, analysis of factors affecting future visitation, and economic potential.

Aquarium Feasibility Study: Toronto, Canada –

Proposed as part of a large mixed use project in downtown Toronto, included a review of project concept, site and visitor capacity, program opportunities, thematic content, and site issues, as well as financial performance.

Pacific Northwest Aquarium: Seattle, Washington –

Evaluated the feasibility of replacing existing Seattle Aquarium with this major new aquarium. Attendance potential was estimated and an operating plan created for this major new addition to the Seattle waterfront.

Busan Aquarium: Busan, South Korea –

Prepared review of historical operating performance and market assessment of aquarium that informed our five-year attendance and operating analysis for this existing aquarium in South Korea. This included a review of the competitive environment for the aquarium and its planned improvements.

Zoo New England: Boston, Massachusetts –

Reviewed the zoo's current and historical operations and interviewed key staff to identify strategic opportunities to increase attendance and revenue potential. CEI worked with the staff as part of a one-day intensive workshop.

Florida Aquarium Expansion: Tampa, Florida –

Hired as part of a team that made recommendations to improve the visitor experience and increase attendance. The Florida Aquarium had opened in 1995, and did not meet its projected level of attendance. CEI evaluated new exhibits, marketing programs, and the impact of new nearby tourist-related development on visitation.

Aquarium and Zoo Qualifications

New England Aquarium: Boston, Massachusetts – Evaluated the market support for potential expansion of current building and program. This work included primary and secondary market research, visitor projections and economic impact evaluations. The first phase of the expansion opened in January 1998.

Wonders of Wildlife Aquarium: Springfield, Missouri - Prepared a market and economic potential analysis of the Wonders of Wildlife (WOW) aquarium expansion and renovation plan, including reviewing potential earned revenue strategies and reflecting potential repositioning of WOW and its relationship with the adjacent Bass Pro Shop.

The Maritime Aquarium: Norwalk, Connecticut – Evaluated the potential cumulative physical, fiscal, and economic impacts of the Walk Bridge reconstruction project on the adjacent Aquarium. Work included an overview of market factors and potential actions to be taken by the Aquarium to mitigate the total impacts of the Federal Railroad infrastructure project.

Dubrovnik Aquarium: Dubrovnik, Croatia – Revisited a public aquarium project proposed in the city of Dubrovnik, a major Adriatic cruise tourism port. CEI reviewed the existing market and economic feasibility study for the project and worked with local authorities to re-envision the aquarium as a center of marine research and education, as well as a destination attraction to support Dubrovnik's tourism economy.

Tongass Coast Aquarium: Ketchikan, Alaska – Assisted Friends of the Aquarium in preparing a business plan for the Tongass Coast Aquarium. Built on past studies for the project, the work focused on preparing up-to-date information to guide the design process and business planning. Changes in market dynamics and the cruise industry were analyzed to inform the revised business plan.

UnderWater World: Mooloolaba, Australia – Prepared a review of historical operating performance and market assessment of the aquarium that informed our five-year attendance and operating analysis. This included a review of the competitive environment for the aquarium and its planned improvements.

Aquarium Site Evaluation, Hong Kong, SAR – Prepared a preliminary review of the proposed site for a new aquarium in Hong Kong. This work included an overview of the market context.

Buffalo Zoo Satellite Project: Buffalo, New York – Conducted a feasibility study for a potential expansion satellite facility of the Buffalo Zoo in the Niagara Falls area.

Buffalo Zoo Master Plan: Buffalo, New York – Analyzed and identified cost-effective solutions to revitalizing this historic zoo over a 12-year period. The master plan focused on rebuilding the Buffalo Zoo within its current size-constrained site.

Shanghai Chang Feng Ocean World, Shanghai, China – Prepared a review of historical operating performance and a market assessment that informed our five-year attendance and operating analysis for this existing aquarium in China. This included a review of the competitive environment for the aquarium and its planned improvements.



Source: ConsultEcon, Inc.

Ocean Sciences Center: Ft. Lauderdale, Florida – Evaluated the proposed site and market and operating potential of outreach components that were envisioned to include an aquarium, visitor center and conference facility. CEI worked collaboratively and iteratively with the design team to help identify the optimum program for each of the outreach components based on market potential.

Niagara Falls Aquarium Master Plan: Niagara Falls, New York – Prepared preliminary site, attendance and economic potential evaluation of the proposed Phase 1 of a Master Plan for the aquarium. This work included review of the current and historical aquarium operations to inform future potential, and was completed as part of an iterative and collaborative planning process with the design team to help identify the optimum program components for Phase 1 that would optimize the economic potential of the aquarium within a specified capital cost budget goal.

Oceanário de Lisboa: Lisbon, Portugal – This two-part project consisted of an evaluation of attendance potential to a proposed aquarium exhibition featuring work by a significant fashion designer. Work included a profile of resident and tourist markets in Lisbon; a review of existing tourist attractions in the area; and an overview of visitation patterns to special exhibitions in Portuguese cultural attractions. The second part of the project involved the attendance and operating potential for a new marine life breeding center and visitor aquarium in the City of Peniche, 90 minutes north of Lisbon on Portugal’s Atlantic coast. Work included a review of available markets to Peniche, including travel patterns and visitor accessibility to the city, and an overview of existing aquatic life attractions in Portugal and other cultural attractions in Portugal’s Centro region.

Tivoli Aquarium: Copenhagen, Denmark – Prepared a site review and market potential of a proposed new aquarium attraction to be developed within Tivoli Gardens and prepared preliminary sizing parameters for the project based on its market potential. CEI reviewed comparable aquarium projects in Western Europe to provide operating benchmarks for this proposed project. Our work included a review of the competitive environment for the proposed Aquarium.

Stephen Birch Aquarium at Scripps Institution of Oceanography: La Jolla, California – Provided an analysis of market and attendance data for “Benchmark Profile.” This work included local market analysis and an analysis of attendance at Scripps and comparable facilities. CEI reviewed existing aquarium data to determine current visitor patterns, trends and characteristics at the Aquarium.

Feasibility Study for Aquarium: Atlanta, Georgia – Evaluated the feasibility of the development of a major new aquarium in Atlanta. Work included alternative site analysis, market and financial feasibility and economic impacts. Primary market research was also conducted.

Aquarium at Xanadu: Meadowlands, New Jersey – Evaluated the market context for this project proposed as an integral attraction component of the Xanadu mixed use development as it related to the regional competitive context.

Maritime Aquarium Master Plan: Norwalk, Connecticut – Prepared site, attendance and economic potential analysis for the proposed Phase 1 of a Master Plan for the Aquarium, as part of a master planning team. This work included review of the current and historical aquarium operations to inform the potential of the Master Plan, and was completed as part of an iterative and collaborative planning process with the client and the design team to help identify the optimum program components for Phase 1 that would optimize the economic potential of the aquarium within a specified capital cost budget goal. This work also included sensitivity analysis of the operating potential of the aquarium with Second Wave DMR films at the IMAX Theater and without DMR films.

New Bedford Oceanarium: New Bedford, Massachusetts – Analyzed market and economic impacts, and revenue potential projections. This project involves the retrofitting of a decommissioned electric generation plant to include a million-plus gallon aquarium, focusing on worldwide ocean habitats. Initial fund-raising activities are under way.

J.L. Scott Marine Center and Aquarium: Biloxi, Mississippi – Retained by the University of Southern Mississippi Institute of Marine Sciences to evaluate the future for J.L. Scott Marine Center and Aquarium, this study evaluated a series of alternative futures for the center related to various land use programs.

Wildlife Conservation Society: New York, New York – Evaluated potential expansion plans and programs for this major institution. The project evaluated would be a major new aquarium to be located in Manhattan. Focus group consumer research was accomplished to support the market study and financial feasibility analyses.

Evaluation of Food Service Potential at the Ecotarium: Worcester, Massachusetts – Conducted an analysis of the potential for expanded food service at this wildlife and nature center. The work included an assessment of existing facilities and recommendations for expansion and improvements, as well as projections of revenue potential.

Aquarium and Zoo Qualifications

Aquarium and IMAX Theater: Hamburg, Germany – Reviewed the market potential for mixed-use development, evaluated market support factors for the project and assisted in the financial evaluations and project packaging.

Ocean Science Center and OceanQuest Learning Center: New London, Connecticut – Served as project reviewer and financial advisor to The Connecticut Development Authority for this proposed oceanography science museum and science camp.

Puerto Rico EcoCenter: San Juan, Puerto Rico – Assessed the feasibility of this proposed Aquarium and EcoCenter in San Juan. Included in the study were alternative site analysis, market potential, financial feasibility, and economic and tax impact assessments.

Avian Environmental Center: Anchorage, Alaska – Evaluated the market and financial support for an environmental center in Anchorage, Alaska, as well as resort and wilderness lodge concepts, for the Anchorage Economic Development Corporation.

South Carolina Aquarium: Charleston, South Carolina – Evaluated their attendance to date, market support, development of a marketing and pricing plan, future attendance projections, and operating strategies for the Aquarium, which opened May 2000.



Source: South Carolina Aquarium.

National Aquarium of Mexico, Mexico City, Mexico – Prepared market and economic feasibility analysis of proposed aquarium in the Azcapotzalco region of Mexico City. This work included a review of the proposed site for the aquarium as part of a larger, mixed-use leisure development at a former refinery site.

PIER Visitor Market Potential: Oceanside, California – Evaluated the visitor market potential of the proposed Pflieger Institute of Environmental Research (PIER) project, which includes research, education and visitor attraction elements. Also included was an estimate of the direct fiscal revenues the project would provide to the City of Oceanside.

Funchal Aquarium: Madeira, Portugal – Evaluated the potential to develop a new aquarium on this resort island in the Atlantic Ocean. Market and financial feasibility analysis, as well as a site review, was used to provide input to the design of the project.

Oklahoma City Zoo Master Plan: Oklahoma City, Oklahoma – Evaluated the economic potential and impacts of a 10-year Zoo Master Plan. Our work included identifying possible program elements with the best economic returns, as well as market, financial and business plans for the zoo. This included an assessment of the current operating profile as well as the future operating potential given an enhanced product and expanded revenue streams.

World of Atlantis: Houston, Texas – Evaluated the feasibility of a proposed aquarium in Houston. This work included site evaluation for several possible locations, market evaluation and financial potential.

Mystic Aquarium: Mystic, Connecticut – Evaluated market and financial feasibility for a major expansion to the Mystic Aquarium. CEI prepared financial and economic impact projections. The first phase of this project opened in the spring of 1998.



Source: Lyons-Zaremba, Inc.

Environmental Science Learning Center: Perryville, Missouri – Assessed the feasibility of and development potential for the Environmental Science Learning Center proposed for Perryville, Missouri that would feature many tigers in a sanctuary setting. The concept for the project is not a general visitor attraction, but rather, is focused on special markets to include school groups, eco-tourists and corporate meetings. CEI conducted an analysis of the site, market potential, operational issues, and economic impacts.

Living Planet Aquarium Feasibility Study: Salt Lake City, Utah – Assessed the feasibility of a new aquarium in Salt Lake City. This included site analysis, infrastructure needs, market evaluation and operating plan. Also projected were the economic benefits to Salt Lake City of a major new aquarium.

Market Feasibility for an Aquarium/Mixed Use Development: North Little Rock, Arkansas – Conducted a feasibility assessment of market potential for an aquarium on the North Little Rock waterfront. CEI provided an overview of site characteristics and other proposed real estate uses, including large format film theater, hotel, retail and restaurant development, with the intent to create a successful mixed-use environment in which the aquarium could prosper.

Steinhart Aquarium: San Francisco, California – Assisted the California Academy of Sciences in planning for revitalization of their facilities, which include the Steinhart Aquarium, Museum of Natural History, and the Morrison Planetarium. CEI evaluated a range of options for the Academy, from staying in Golden Gate Park to moving to a new site in downtown San Francisco. This evaluation included attendance and financial forecasts.

New Jersey State Aquarium Expansion: Camden, New Jersey – Analyzed alternative entertainment development programs in association with redevelopment of the Camden, New Jersey waterfront and the proposed expansion of the aquarium. Uses evaluated included IMAX-type cinema, motion simulators, 3D movies, major coral reef tank, and other entertainment and educational attractions.

Aquarium Charlotte Feasibility: Charlotte, North Carolina – Analyzed market potential and economic feasibility for a major new attraction in Charlotte. Working in conjunction with the Discovery Center, this aquarium would be developed in Uptown.

Market Support for VisionQuest Aquarium: Birmingham/Bessemer, Alabama – Assessed market potential of the proposed VisionQuest Aquarium, which is planned as a full-scale aquarium to be located north of the new VisionLand theme park.

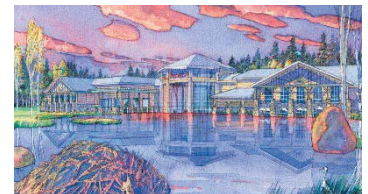
IFE at Mystic Aquarium: Mystic, Connecticut – Reviewed the impact of the Institute for Exploration (IFE) addition to the Mystic Aquarium from a visitor and financial perspective, which included preliminary pro forma operating projections. The IFE is a major expansion, offering an immersive technological approach to education.

Athens Aquarium Feasibility: Athens, Greece – Reviewed potential for an aquarium in Athens, Greece. Basic market support studies reviewed the potential for development of this project to open during the Olympics.

Aquarium Industry Overview Report – Retained by a confidential client to provide an evaluation of the aquarium industry, with particular emphasis on project metrics, development costs, visitation levels, visitor per capita revenue from admissions, retail and food sales, as well as other typical sources of income, operating expenses and net operating income. This work also described the current organization of the industry, economic state of the industry, including key issues in aquarium development and success factors.

Flint River Aquarium Feasibility Study: Albany, Georgia – Assessed the potential market support and proposed an operating plan for an attraction comprised of an aquarium, a regional interpretive center and a science museum.

Natural History Museum of the Adirondacks: Tupper Lake, New York – Evaluated market support for and financial feasibility of the project. The site for the project is in a rural community located in the center of the Adirondack Park of New York State. This project is currently being implemented.



Source: Hellmuth, Obata & Kassabaum.

Northwest Waters Aquarium: Tacoma, Washington – Evaluated the potential to develop a major aquarium along the Thea Foss Waterway in Tacoma, Washington. This work evaluated the market potential for a downtown aquarium location. The project would be developed by a civic leadership group, but operation would be by the management of the Point Defiance Zoo and Aquarium, which is currently owned by the metropolitan Park District and operated by the non-profit Zoological Society. This assignment also included alternative site analyses.

Aquarium and Zoo Qualifications

Alaska SeaLife Center: Seward, Alaska – Prepared the business plan for a proposed sea life center, marine research and marine mammal rehab and rescue facility. Funding for the project was obtained from the Exxon-Valdez settlement. The project opened in the spring of 1998.

Long Island Aquarium at Bay Shore, New York – Evaluated the feasibility of the development of an aquarium and large-format film theater in Bay Shore, Long Island. Also included in the work were an analysis of project concept, site and location characteristics, and market support. Telephone surveys of area residents provided insights into market response to the Aquarium. The report projected attendance and financial operations, along with the economic impact of the project.

North Carolina Zoo Expansion Feasibility: Asheboro, North Carolina – Evaluated an expansion program for the North Carolina Zoo that included an Earth Resources Center. Other components of the project include a conference center and hotel.

Aquarium Feasibility Study: Oberhausen, Germany – Performed a market support evaluation and financial performance projection, including a review of the site context, for a proposed aquarium in Oberhausen, Germany. This is part of a major mixed use project in an urbanized area.

Irish National Aquarium: Dublin, Ireland – Evaluated the market support and financial feasibility of an aquarium in Dublin, and evaluated the economic impact, particularly as related to overall tourism development in Ireland.

Visitor Center Study for Pelican Island, Florida – Evaluated the development of a visitor center at this historic National Wildlife Refuge. The project would showcase the natural environment and history of the National Wildlife Refuge system.

Economic Evaluation of Proposed Hudson River Aquarium: Poughkeepsie, New York – Evaluated market and financial feasibility and the economic impact of the proposed aquarium. The facility was planned as a full-scale aquarium and research center with an IMAX Theater, to be located on the Hudson River.

Kansas City Aquarium Feasibility: Kansas City, Missouri – Analyzed economic potential for an aquarium in Kansas City, including site selection, resident and tourist market analysis, comparable projects review, project sizing, and financial potential. CEI also created a development profile that recommended cost parameters, timeline and funding sources.

Aquarium Feasibility in Salvador, Brazil – Evaluated potential for an aquarium in Bahia Azul, Salvador, Brazil.

Gulf of Maine Aquarium: Portland, Maine – Served as advisors to the Gulf of Maine Development Corporation, which is proposing to develop an aquarium on the waterfront in Portland. CEI have evaluated sites and development programs, forecast attendance and prepared financial projections.

Mississippi River Museum and Aquarium Master Plan: Dubuque, Iowa – Evaluated the museum, as well as analyzed new attractions which would introduce natural landscapes and aquarium components to the facility. This project successfully opened in 2004. Since opening, CEI have worked with project management to evaluate a series of expansion projects and new initiatives including a Mississippi River tour boat.

St. Lawrence Aquarium and Ecological Center: Massena, New York – Retained by The New York Power Authority to examine the market and financial feasibility of this proposed Aquarium project in Massena, New York. In addition, CEI projected the financial impacts of project construction and operation.

Georgia Aquarium: Atlanta, Georgia – Evaluated the market support for the initial concept and location for the Georgia Aquarium.



Source: Georgia Aquarium.

Colorado Ocean Journey Aquarium: Denver, Colorado – Prepared an analysis of operations and potential rescue strategies for the aquarium and provided valuation analysis as part of the bond holders' evaluation of the Denver Aquarium and to avoid a default on Aquarium bonds.

Market Support for the St. Louis Aquarium: St. Louis, Missouri – Completed detailed feasibility study for proposed aquarium to be located in St. Louis. This project would be an adaptive reuse of the historic St. Louis Arena located adjacent to Forest Park and the St. Louis Zoo.

Tennessee Aquarium: Chattanooga, Tennessee – Provided a review of the financial projections for the aquarium expansion plan and the potential impact of competition in the market. The plan was implemented.



Source: Tennessee Aquarium

Akron Aquarium: Akron, Ohio – Provided market and financial feasibility evaluations for a major new aquarium to be developed in Akron, Ohio. This project would be a major new attraction in northeastern Ohio.

Montreal Aquarium: Montreal, Canada – Tested the market potential of developing an aquarium in Montreal. Tasks completed included site evaluations, resident and tourist market profiles, comparable projects review, analysis of factors affecting potential visitation to the proposed facility, project sizing, operating characteristics, and a profile of economic impacts.

Great Lakes Aquarium: Duluth, Minnesota – Provided evaluations for expert testimony in a court case related to the delay in opening of the Great Lakes Aquarium. This work included production of memoranda detailing timelines and circumstances of the Aquarium opening and comparisons with other comparable facilities.

Northwestern Hawaiian Islands Mokupapapa Discovery Center: Hilo, Hawaii – Evaluated the feasibility of an Ocean Discovery Center for the Northwestern Hawaiian Islands Coral Reel Ecosystem Reserve. This Center opened in Hilo in the summer of 2003.

Mote Marine Laboratory and Aquarium: Sarasota, Florida – Worked with Mote Marine Laboratory to review future operating potential of the Lab's primary outreach component, the Mote Aquarium. CEI reviewed the current and past Aquarium operation as well as the market context for potential future improvements.

Bass Fishing Hall of Fame: Scottsboro, Alabama – Prepared a market and economic feasibility analysis of the proposed Bass Fishing Hall of Fame to be located in Scottsboro, Alabama. As part of this work, CEI reviewed the site, project objectives and concept, and conducted market analysis of both resident and tourism segments, as well as freshwater sport fishing niche markets. CEI reviewed comparable projects, and provided estimates of the attendance and operating potential of the project.

Aquário de Luanda: Luanda, Angola - Evaluated the proposed site and assisted in developing a program plan. CEI also worked collaboratively and iteratively with the Portuguese and Angolan design team to help identify the optimal program components based on the market potential of the proposed Aquarium to be located as part of a mixed-use site in downtown Luanda.

Samsung Everland Aquarium: Seoul, South Korea – Provided an analysis of the economic feasibility of developing an aquarium as a major new separately ticketed attraction. This included market study, evaluation of mutual market and operating support with the theme park; evaluation of several siting options in the theme park and full revenue and expense operating pro formas.



Source: The Portico Group

Rockford Aquarium: Rockford, Illinois – Prepared a market and economic feasibility study for a proposed Aquarium in Rockford. This work included a review of several potential sites and definition of resident and visitor markets, physical planning parameters and attendance potential. In addition, the experience of local attractions and comparable projects around the country were profiled and potential economic impacts were estimated.

Virginia Aquarium and Owls Creek Area Plan – Created a baseline economic profile of the area around the Virginia Aquarium and identified potential development strategies. Based on the preferred design plan, CEI evaluated the economic potential of the master plan and quantified the increased economic activity that would occur once the plan was implemented.

Aquarium and Zoo Qualifications

Acquario di Genova Aquarium Feasibility Study: Genoa, Italy – A market support evaluation was conducted for Acquario di Genova, which was successfully developed as part of a World’s Fair, and has become a major visitor attraction in Italy.

King Abdullah Financial District Aquarium: Riyadh, Saudi Arabia – Prepared a preliminary operating business plan to guide detailed design phases and project planning for a 15,000 gross square meter aquarium in the King Abdullah Financial District in Riyadh. This included a preliminary market assessment, attendance potential, earned revenue potential, staffing plan and operating expenses.

Secrets of the Sea Aquarium: Pinellas County, Florida – Assisted the successor organization to the Pier Aquarium in St. Petersburg with evaluating alternative sites for a new marine science center and aquarium. The Pier Aquarium had to leave its former site on the St. Petersburg Pier as the pier was found to be structurally unsound. CEI analyzed key locational factors, resident and tourist market trends and the competitive context to inform the site selection process and serve as the basis for business planning. CEI developed an operating plan, analyzed the project’s potential economic impacts, and identified the development strategy to best position the organization to negotiate with multiple land owners.

ConsultEcon, Inc. (CEI) provides services to clients in the areas of strategic and management consulting, project and plan concept feasibility, economic development, market and financial feasibility evaluation, socio-economic impact evaluation and project implementation. Our practice builds on the decades of experience providing results-oriented solutions for clients by drawing on our expertise and experience in marketing, economics, management, finance and planning. The following list includes examples of assignments in Texas.

Trinity Interpretive Center: Dallas, Texas – Analyzed the potential market for the proposed Trinity Interpretive Center. The Trinity River Corridor has strong potential as an urban green way. Its location within the Great Trinity Forest provides context and educational opportunities to learn about a variety of natural habitats, as well as the River’s important role in human settlement of the region.

San Antonio Visitor Center Evaluation: San Antonio, Texas – Prepared a visitor center strategy for San Antonio that considered alternative sites and alternative visitor center types. CEI evaluated the current tourism information and reception offerings in San Antonio. A strategy was prepared that included operational location for a major gateway visitor center (along with program of spaces, visitor center offerings, and capital costs) and a recommended mobile visitor center that would take advantage of the many events and tourism related sites in and around San Antonio.

Evans & Rosedale Neighborhood Revitalization: Ft. Worth, Texas – Prepared an economic and redevelopment plan for this historic neighborhood in Ft. Worth, Texas. CEI worked with a planning team and prepared market support studies for neighborhood retail development, housing and supportive community facilities and recreational infrastructure.

Witte Museum: San Antonio Texas – For the major phased expansion and refurbishment of this natural history, science and history museum focused on south Texas, CEI evaluated phasing strategies, prepared an attendance potential analysis; and a comprehensive operating strategy. A pre-opening phasing budget and phasing the economic impacts of the new Witte museum including employment, business activity and fiscal revenues were analyzed.

Texas State Aquarium: Corpus Christi, Texas – Conducted a market feasibility study of the potential expansion of the Texas State Aquarium with a new dolphin wing. This work included Aquarium baseline analysis, a review of expansions at other facilities, market segmentation, an analysis of factors affecting future visitation, and economic potential. Subsequently CEI has prepared a feasibility study for the currently planned major expansion of the Texas State Aquarium.

McNay Art Museum: San Antonio, Texas – Prepared a Strategic Business Plan that focuses on enhancing the museum’s major exhibition capacity in its new Stieren Center for Exhibitions that opened in 2008. Important issues included ticketing approaches, exhibition policies and balanced organizational growth within the context of available operational and endowment funding. The strategic business plan was developed iteratively with McNay Art Museum leadership and in concert with the museum’s advisors and consultants.

Austin Planetarium and Science Center: Austin, Texas – Prepared a preliminary market and economic impact analysis of the proposed Austin Planetarium and Science Center to be located as part of a larger mixed-use development in Austin.

Cavanaugh Flight Museum: Addison, Texas – Conducted a study to evaluate the feasibility of the proposed expansion of the Cavanaugh Flight Museum in Addison after first providing consulting services in a charrette format. This work included site evaluation, market support, review of industry experience of comparable facilities, and attendance potential, as well as an operating plan for the expanded Museum that included revenues, operating expenses and a personnel plan. Fiscal and economic impacts were also analyzed.

Cedar Park Heritage Plan: Cedar Park, Texas – Assisted the City of Cedar Park in Heritage Tourism Planning. This work included reviewing the characteristics of existing heritage tourism sites within the community, reviewing the market context for the project, reviewing trends in heritage tourism, developing a framework for evaluating alternatives, and defining and evaluation of a preferred alternative.

Mechanical Music Museum: Duncanville, Texas – Prepared a market and feasibility study for a proposed museum based on a private collection of mechanical musical instruments. This work included an evaluation of the market context and operating potential for the project, as a basis for the City of Duncanville to make planning decisions about proceeding with the project.

Great Texas Air Museum: San Antonio, Texas – Prepared a feasibility assessment that included resident and tourist market review, aviation museum market trends, opportunities for other aviation related activities, as well as attendance potential and patterns. This work also included a museum operating plan, and economic impacts.

Dallas Maritime Museum: Dallas, Texas – The Dallas Maritime Museum is a proposed museum that would become a public attraction as a part of a large-scale mixed-use redevelopment project on the Trinity River. The primary exhibits of the new museum would be two historic ships berthed onsite: the USS Dallas, a nuclear submarine, and the USCGC Dallas, a coast guard cutter. CEI provided input into the preliminary museum plans and developed an industry review of historic ships as public attractions to identify key success factors and garner support for the new museum.

World of Atlantis: Houston, Texas – Evaluated the feasibility of a proposed aquarium in Houston. This work included site evaluation for several possible locations, market evaluation and financial potential.

San Benito Heritage Tourism Plan: San Benito, Texas – Evaluated the market and economic potential of developing a new museum and cultural center as the cornerstone of a tourism development strategy. San Benito is the home of Freddy Fender and the birthplace of Conjunto music, as well as endowed with unique natural features found in the Rio Grande Valley. As a part of this work, CEI reviewed alternative development scenarios, including the reuse of several historic buildings and new construction opportunities at other sites. A facility concept, attendance potential analysis, operating plan, and preliminary marketing and fundraising plan were prepared.

Cedar Park Visitor Center: Cedar Park, Texas – Based on a thorough review of existing tourist market segments, tourism assets, and future plans for tourism-oriented developments, CEI identified the most appropriate locations for a tourist information center in this community near Austin. In addition to the opportunity for a newly constructed building, CEI assessed the potential for mobile tourist information carts and vehicles as well as the use of computerized information kiosks. CEI presented a range of capital and operational costs associated with each alternative tourist information strategy—building, mobile, and kiosks—to enable the community to make an informed decision about which method would best serve their tourism market currently and in the future.

Conference Center/Hotel Feasibility: Austin, Texas – Analyzed the market potential for development of a hotel/conference center to be located in a former student dormitory facility. Also outlined the hotel/conference center concept, reviewed the hotel and meetings market and the local and regional competitive context, described the market potential for those uses, and evaluated the financial implications of a phased conversion.

As a service to our clients and others, we provide conference presentations, occasional research reports and project reviews on topics of interest which highlight various trends and aspects of our practice. We provide consulting services to clients in the areas of project and plan concept development, business planning, feasibility evaluation and implementation. We specialize in the fields of visitor attractions and facilities; museums, aquariums; zoos; tourism and resort development; real estate and urban development; and community planning. We welcome your comments.

KEYS TO ECONOMIC SUSTAINABILITY OF AQUARIUMS: EXAMPLES FROM THE WORLDWIDE AQUARIUM “INDUSTRY”

This paper was prepared by Mr. Thomas J. Martin, President of ConsultEcon, and Ms. Elena Kazlas, Principal of ConsultEcon, and presented by Ms. Kazlas in October 2008 at the International Aquarium Congress in Shanghai, China. It will be published in the Conference Proceedings.

Introduction

A large number of aquariums exist in many countries of the world and are established attraction types in the U.S., Europe and Asia. In some countries, like Japan, there are already exists a concentrated number of aquariums therefore limiting the potential for new aquarium projects. While in other countries, like India, new market opportunities may exist for aquariums. Overall, the economic sustainability of aquariums varies depending on their unique location, governance and competitive market environment.

Mr. Martin and Ms. Kazlas are leading experts in the economic sustainability and development of aquariums worldwide. They have combined over 50 years of experience in the aquarium “industry” and have worked on aquarium projects in North America, Europe, Asia, Australia, Middle East, South America, Central America, and Africa. ConsultEcon is the leading consultant to the aquarium industry.

No one that we are aware of has undertaken a review of the worldwide aquarium industry. This paper is a first attempt to profile the industry and review keys to economic sustainability.

Our paper is based on our work in the aquarium industry, our primary market research in the form of an online survey about potential new aquarium developments, and our internal project reference files of aquariums, zoos and other attractions worldwide. The result of our paper is a review of the future of the aquarium “industry” internationally and new markets for aquariums, including the requirements for an economically sustainable aquarium.

World Aquariums: The Current Collection

Aquarium is defined as “a building or institution in which fish or other aquatic animals or plants are kept for exhibit, study, etc.”¹ Interestingly, according to the Encyclopedia Britannica, the Chinese, who raised carp for food as early as 1000 B.C., were probably the first to breed fish with any degree of success. Their selective breeding of goldfish was later introduced to Japan, where the breeding of ornamental carp was perfected.

Aquariums can be either freestanding attractions; components of other natural history attractions such as zoos, museums or nature centers; or as part of larger marine animal theme parks. In addition, the ownership and governance of aquariums also varies, whether public/private, not-for-profit or for-profit. As the costs associated with building and operating an aquarium attraction are relatively high in comparison to other attraction types, there are many varying examples of

¹ Source: Dictionary.com.

financing models for aquariums. As aquariums are proven education, conservation, entertainment and economic development institutions in their communities, these economic development and community benefits have been the basis for substantial government funding support for many aquariums, and many aquariums are developed as public/private partnerships.

We have attempted to count the total number of aquariums worldwide. We compiled a databank from a number of sources including aquarium member organizations worldwide, other online sources and from our Project Reference Files, research and experience (see References). We have records, including our Project Reference Files, on 725 aquariums worldwide, as shown in **Table 1**, with the majority located in Western Europe, North America and Asia. However we estimate the total actual number of aquariums worldwide to be between 900 and 1,000 facilities. It is indeed an “industry” in the sense that there are people and firms with skills and expertise unique to the industry and aquariums have unique needs that have created supportive industries.

Location	Number of Aquariums	Percent of Total
Western Europe	272	38%
North America	173	24%
Asia	166	23%
Eastern Europe	40	6%
South America	34	5%
Australia/New Zealand	23	3%
Africa	9	1%
Middle East	8	1%
Total	725	100%

The international experience of aquariums indicates that there are many major aquariums that successfully serve large resident and/or tourist markets as well as many mid-sized aquariums that serve smaller resident and/or tourist markets. Stand-alone, public aquariums

were first developed as public attractions over 150 years ago at such locations as Paris (1867), Berlin (1869), Brighton, England (1872), Naples (1874), New York (1896), and Honolulu (1904). The New York Aquarium reportedly recorded over 1.6 million visitors in 1897.² The second generation of aquariums were developed in the early 20th century in San Francisco (1922), in Chicago (1929) and in Qingdao, China (1932).³ In those facilities and other early aquariums, single species of animals were typically displayed in jewel tanks. In the 1950's, a new aquarium concept emerged in the U.S. The Oceanarium, initiated by Marine Studios near St. Augustine, Florida, included exhibits with whole communities of marine animals displayed in huge tanks containing hundreds of thousands of gallons of water. The emphasis was on entertainment, with dolphins (and later, whales) performing in shows for seated audiences. The concept was so successful that it was repeated in other locations and many sea life parks were developed in the Americas, Europe and Asia. A new concept emerged in the 1960's, which was an indoor aquarium with dramatic and iconic architecture and large realistic aquatic exhibits, such as the New England Aquarium in Boston (1969). This approach was very popular, and along with outdoor sea life parks has been successfully replicated throughout the world at different physical scales and interpreting many aquatic habitats. Both types of aquariums have been very popular as they appeal to people of all ages. An important recent trend has been the re-creation of habitats that represent entire ecosystems that include land and aquatic environments and different strata of life. These include examples of the world's most important and interesting biomes. Careful planning and project execution are the hallmarks of successful aquarium projects.

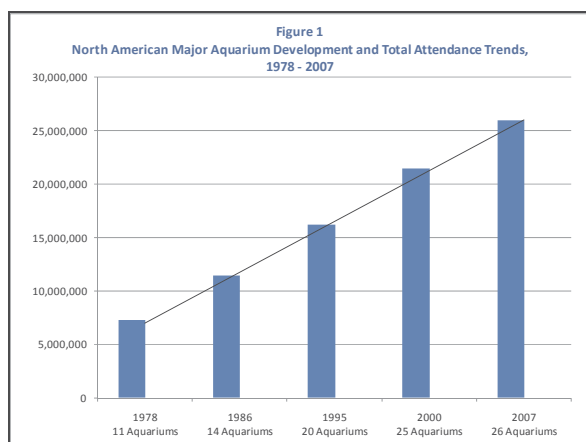
² Leighton Taylor, *Aquariums, Windows to Nature* (Prentice Hall, 1993).

³ Zhang, X et al, *Tour d'horizon des Aquariums en Chine*, Bulletin de l'Institut océanographique, Monaco, n° spécial 20, fascicule 1 (2001), English translation.

Conference Presentation

The benefits of public aquariums have been such that they have been developed throughout the world, and continue to maintain popularity with tourists and achieve high rates of repeat visitation among resident populations. These public aquariums are often a city's most high-profile visitor attraction. Aquariums have particularly "enjoyed a renaissance"⁴ in the past 30 years and have been seen as urban renewal catalysts, as both large and small cities have planned to develop or have developed aquariums not only for social value but also for economic development benefits. An example of this is the experience in North America.

Figure 1 shows the growth of major aquariums in North America and their combined annual attendance over the past 30 years. As shown in Figure 1, both the number of projects and total attendance has grown substantially over the 30-year period. Aquariums are now a well-known attraction type that many visitors have visited in the past and in locations worldwide. Aquariums are considered high value experiences to be included on a tourist's itinerary and as a special outing for area residents. Many aquariums have successfully interpreted their unique, local marine or freshwater stories, becoming a "must-see" destination in tourism settings, as a visit to the aquarium becomes part of the tourists' experience in learning about the place they are visiting.



Source: ConsultEcon, Inc.

⁴ Association of Zoos and Aquariums, *2020 Trend Report* (1999).

Overall, public aquariums have been a source of quality entertainment for many years exhibiting a variety of marine species that patrons would not otherwise be able to see and creating a unique and memorable experience. In the past few decades, aquariums have evolved into not just a source of entertainment for its visitors but also a vehicle for public education and research about aquatic environments, directly and indirectly stimulating the desire to preserve these environments.

The technology and exhibit techniques of aquariums have improved substantially in the past decades. Advanced life support systems; improved husbandry techniques; larger, unobstructed acrylic panels and tunnels for better viewing; and other improvements are available to the new generation of aquariums. However, as technological advances have improved and enhanced the visitor experience, visitor expectations have also risen.

Potential Markets

To gain further insights into the future of the industry, we surveyed about 350 people in the aquarium industry worldwide about what they saw as the top potential new markets for aquarium development, and about the location and status of new aquarium development underway. The responses were weighted to those with understanding of the English language, with 75 percent within North America and 25 percent from outside North America. There were a wide range of respondents from aquarium employees, to architects and exhibit designers, to owners and operators to aquarium suppliers and consultants. We received 85 responses, or about a 24 percent response rate.

After weighting the responses for top markets for new aquariums, the top six markets for aquarium development (in order) were China, the Middle East, North America, Southeast Asia, South America and Eastern Europe. The survey also found that there are currently about 53 new aquariums being developed worldwide. For those 51 projects for which there were responses, 55 percent are in the planning phase, 25 percent are in design, and 20 percent are under

construction as shown in **Table 2** below.

Phase of Development	No. of Aquariums	Percent of Total
In Planning	28	55%
In Design for Construction	13	25%
Under Construction	10	20%
Total	51	100%

Of the 53, 42 percent are in North America, 23 percent are in Asia, 11 percent for both the Middle East and Western Europe, 6 percent in South America, and 4 percent for both Eastern Europe and Africa as shown in **Table 3** below.

Location	No. of Aquariums	Percent of Total
North America	22	42%
Asia	12	23%
Middle East	6	11%
West. Europe	6	11%
South America	3	6%
Africa	2	4%
Eastern Europe	2	4%
Total	53	100%

Overall, our survey conclusions are that there is currently aquarium development activity in all parts of the world.

Keys to Economic Sustainability

We have identified 11 factors, or “keys to success”, that contribute to the successful aquarium. They are as follows:

1. **Established on a Sound Financial Basis** - An aquarium must be established on a sound financial basis for it to have adequate resources to accomplish the success factors above, and to achieve its goals of education and benefits to conservation in an entertaining environment. The sources of revenue for aquariums typically

comprise the following:

Earned Revenues:

- ◆ Admissions
- ◆ Memberships
- ◆ Retail
- ◆ Food Service
- ◆ Special Events and Facility Rentals
- ◆ Programs
- ◆ Miscellaneous (i.e. stroller and locker rentals, donation boxes, traveling exhibits rentals, parking, audio tour rentals)

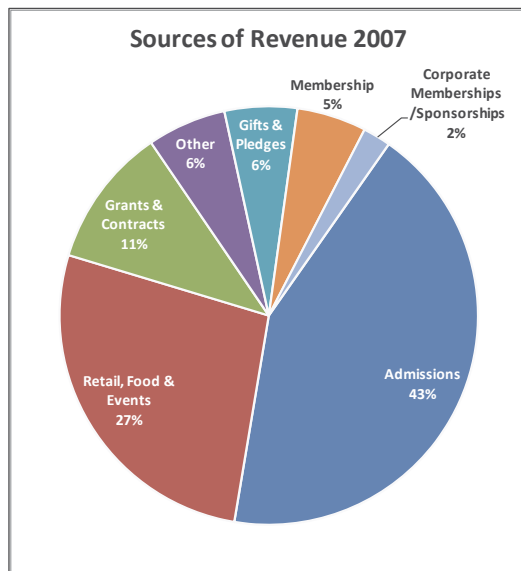
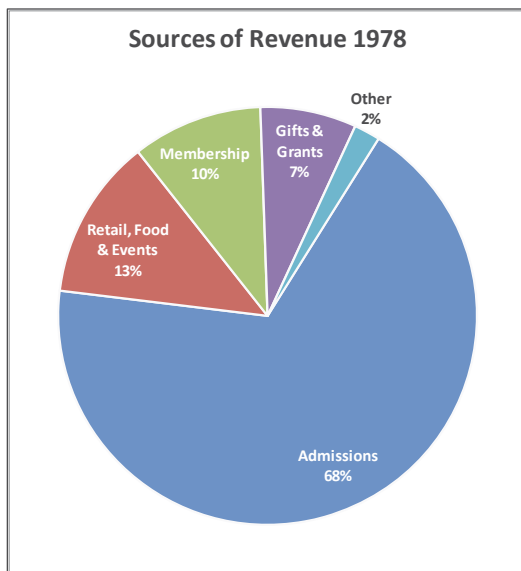
Private, non-profit aquariums, and some for-profit aquariums, have the potential for non-earned revenue which can comprise between 0 and 50 percent of total revenue for some aquariums.

Non-Earned Revenues:

- ◆ Donations
- ◆ Gifts In-Kind
- ◆ Corporate Memberships and/or Sponsorships
- ◆ Educational Programs
- ◆ Research Grants
- ◆ Interest on Operating and Replacement Reserve Account Balances
- ◆ Endowment Proceeds
- ◆ Other

Notably, over the past few decades, aquariums, like other attractions, have focused on increasing their earned revenue potential by adding such activities as unique interactive programs, facility rentals and educational programs on and off-site. The following pie charts show an example of the shift of sources of revenue for an aquarium over a 30-year period.

Conference Presentation



Aquariums have been structured in many different ways. There are a number of legal and operational distinctions between non-profit institutions and for-profit enterprises. It is important to note, however, that non-profit attractions can operate or “behave” much like commercial ventures, and for-profit ventures can embody many of the behaviors more typically associated with non-profit institutions. As such, it is instructive to view each institution on a continuum: at one end, a fully-integrated

commercial vacation destination such as Sea World; at the other end, a non-profit, low admission aquarium with a largely local visitor base. Most aquariums, clearly, fall somewhere in the middle of these two ends of the continuum, and the relative placement of each aquarium on this continuum depends on the institution’s organizational structure, the nature of the products and services offered, and the overall mission and goals of the organization. Key factors that help differentiate for-profit and non-profit aquariums include aquarium mission, extent of education and conservation activities, tax status, capital funding sources and to an extent the nature of the visitor experience. However, recent trends have shown that for-profit aquariums are expanding their educational and conservation activities through a non-profit “friends” group to gain access to public funds to support these programs, increase their attendance potential and improve their image.

2. **Good Location and Site** - Visibility, accessibility, adequate parking and an attractive site are all critical to project success. Good views from the site, supportive nearby land uses and strong connections to the water are also important determinants of the quality of a site for this public use.
3. **Critical Mass of Attraction Elements** - The aquarium (often augmented by nearby visitor attractions) must offer sufficient content to draw residents from nearby and on longer day trips, and to attract visitation from tourists to the area. Some aquariums that have struggled for attendance have not had supportive attractions and visitor infrastructure.
4. **Strong Thematic Focus** - The new generation of aquariums have tended to focus their exhibit program to create a comprehensive “story line” that is much more than the sum of its individual exhibits.
5. **Depth of Visitor Experience Offered** - The aquarium visitor currently has high expectations

of their visit, and a very rewarding experience is needed to sustain repeat attendance and to attract new visitors.

6. **Length of Stay/Attraction Content** - A length of stay and quality of aquarium content must be commensurate with ticket price.
7. **Outstanding Exhibits and Programs** - New aquarium technologies and interpretive techniques are available for the next generation of aquariums to achieve these requirements and goals.
8. **Serves Residents and Visitors** - Aquariums rely on both resident and tourist markets. The location, program and marketing must address both major audience groups and must be sensitive to the unique characteristics of these markets.
9. **Broad Audience Mix** - Exhibits and interpretation that appeal to a wide audience are needed. The audience varies in age and education, level of interest in scientific detail and in expectation for an entertainment versus learning experience.
10. **Offers Multiple Visit Opportunities** - An aquarium must develop a pattern of repeat visitation in its resident markets (and even in its travel markets if possible). Changing exhibit galleries, special programs and events, and attractive membership options are ways to build the repeat visit audience.
11. **Offers Opportunities to Spend and to Relax** - The aquarium must ensure that all of its visitors' needs are fulfilled including opportunities to purchase a souvenir, have a light meal or snack, and have a place to sit and rest during the visit.

The worldwide experience of aquariums indicates that there are many major aquariums that successfully serve large resident and/or tourist markets, as well as many mid-sized aquariums that serve smaller resident and/or tourist markets. The individual market profiles of major aquariums vary depending on their local market

context. Some have achieved deep market acceptance of local markets. Other aquariums have relied more on tourist markets. Still other aquariums maintain a balance, with visitation drawn equally from local residents and tourists. It is an important finding that aquariums can achieve success in various market contexts given quality program content, competitive pricing, strategic marketing programs and developing a sustainable operating model, in particular to offset outside forces, such as economic recession.

Examples of Future Prospects / Challenges

Examples of Future Prospects include:

- ◆ Large, untapped urban markets and tourist destinations.
- ◆ Smaller markets with potential for smaller aquariums.
- ◆ In combination with zoos, natural history museums, nature centers, other mixed-use developments or other facilities.

Examples of Future Challenges include:

- ◆ High cost associated with building new aquariums.
- ◆ General economic conditions.
- ◆ Marine mammals are popular with audiences, especially with the trend in interactive programs, but there issues regarding captivity and public perception.
- ◆ Risk from outside forces, such as being located in a tourist destination that is reliant on international air travel, or challenged economy's impact on both non-earned and earned revenue potential.

Conclusions

We are in a growth industry. Of the top 100 most populated cities in the world, those with metro populations of over 3 million, only about half currently have aquariums. In some of the larger markets there exists more than one major aquarium. For example, Shanghai has two, the Shanghai Ocean Aquarium and

Conference Presentation

Shanghai Chang Feng Ocean World.

Based on our survey, of the proposed new aquariums, over 26 percent are located in the top 100 most populated cities in the world. On the basis of

population alone, this leaves an estimated 40 percent of the most populated cities that do not yet have aquariums or that have aquariums planned. There is significant growth potential for the aquarium industry worldwide.

ConsultEcon, Inc. provides services to clients in the areas of project and plan concept development, evaluation and implementation in the fields of Visitor Attractions, and Travel, Tourism and Resort Development.

Our services in the aquarium industry include:

- ◆ **Business Planning** - Plans for existing and new aquariums and other attractions.
- ◆ **Feasibility Studies** – Evaluation of market support and financial feasibility, including sensitivity analysis.
- ◆ **Site Reviews** – Review of proposed site from market and economic development perspective, including such issues as visibility, accessibility and nearby uses.
- ◆ **Alternative Site Selection** - Evaluation of alternative sites for aquariums and attractions.
- ◆ **Operations Evaluation** - Evaluation of management and operations with strategic solutions for both non-profit and commercial operators.
- ◆ **Economic Impacts** - Economic and fiscal impacts of aquariums and attractions. This is often an important component in project funding with publicly supported projects.
- ◆ **Project Reviews** - Independent project evaluations for leadership and funders.

- ◆ **Master Plans** - Site and market analysis, operating plans, and sensitivity analysis for single and multiple use sites.
- ◆ **Expansion Plans** - Analysis of potential visitation and operations impacts.
- ◆ **Pre-Opening Planning** - Development of pre-opening plans including timing of staff hires, operating expenses, exhibit programming, animal collections, temporary holding, installation, marketing for opening, and cash flow.
- ◆ **Project Repositioning** – Strategic evaluation of marketing and operations for a project based on those project’s unique circumstances and/or related to outside forces, such as an economic recession.
- ◆ **Primary Market Research** - Visitor surveys and focus groups, pricing, and interpretive approach.
- ◆ **Real Estate Evaluations** - Rent, valuation, and feasibility analysis for aquarium, other attractions’, retail and food service properties.
- ◆ **Tourism Development** – Local and regional strategies for developing and increasing visitation.

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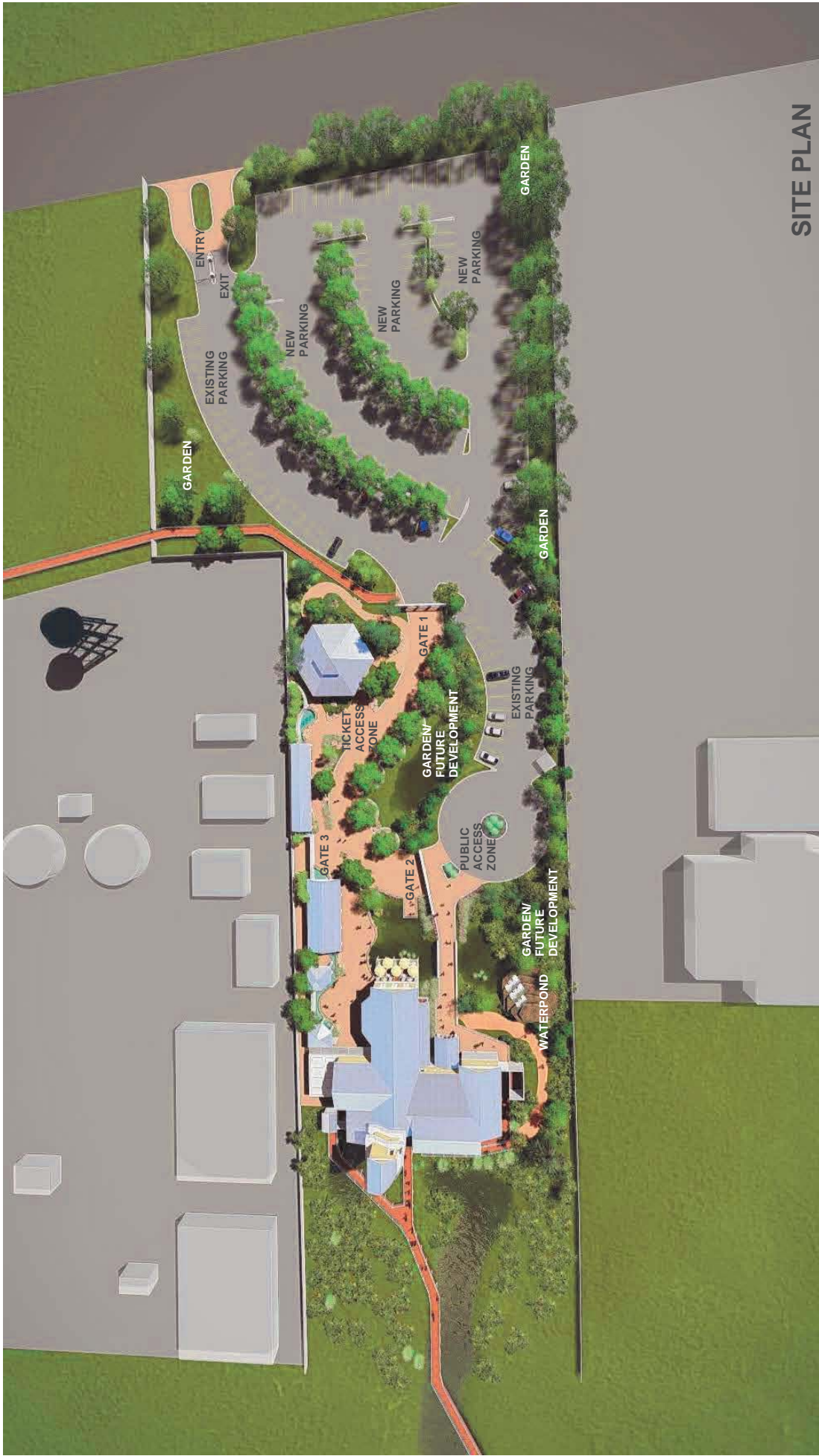


SOUTH PADRE ISLAND MARINE LIFE CENTER SCHEMATIC DESIGN

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SITE PLAN

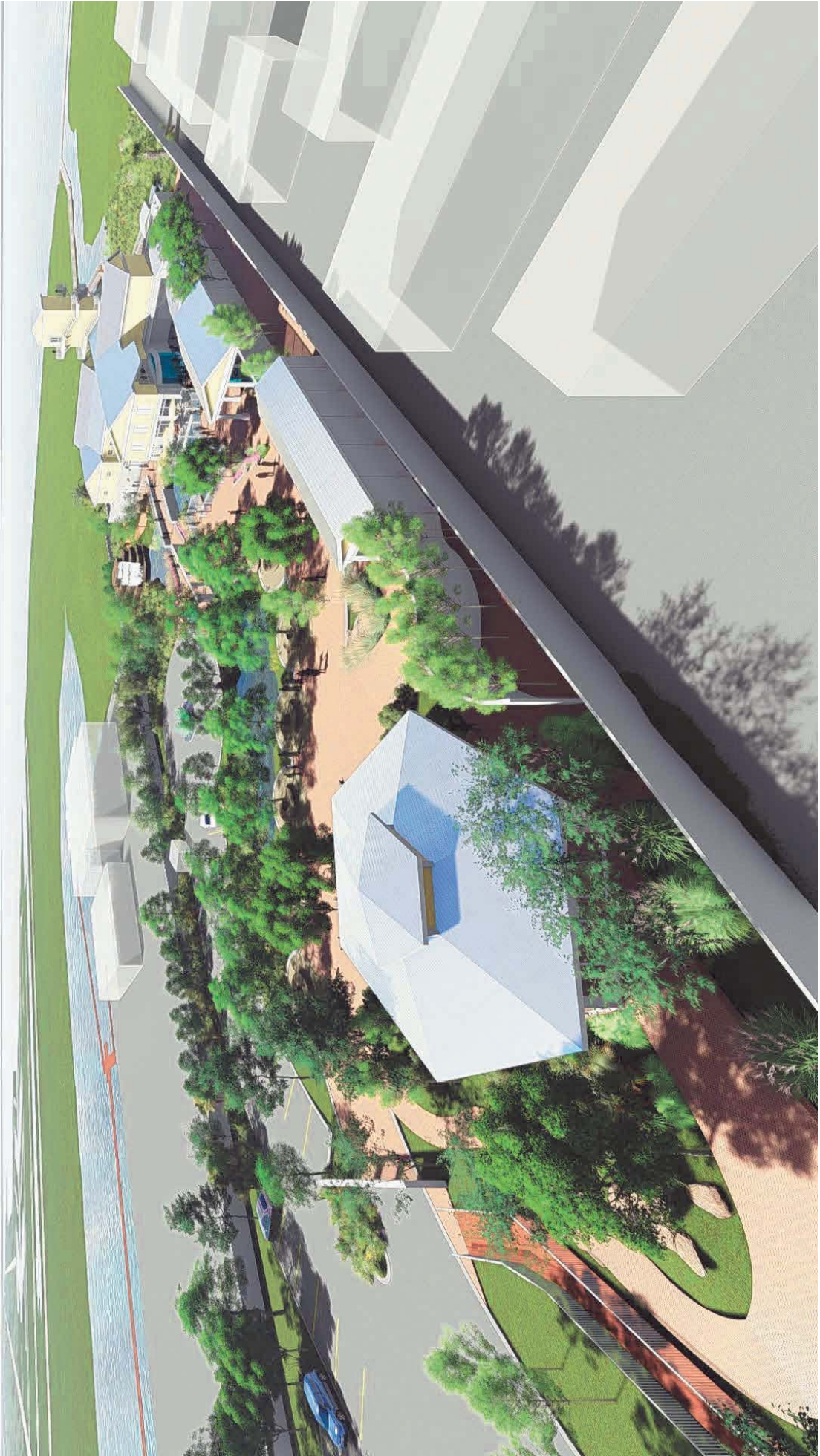


GROUND FLOOR

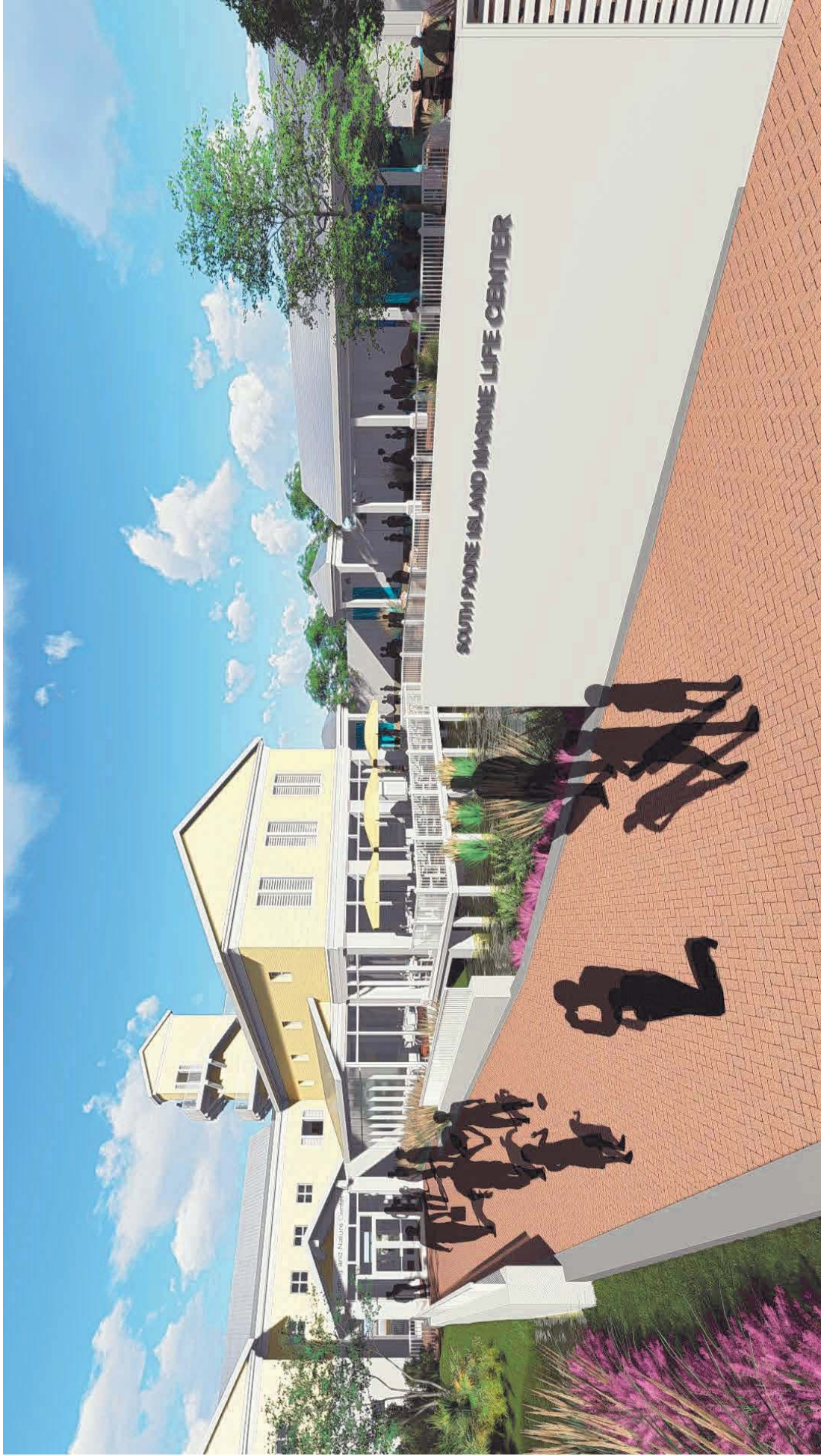


SECOND FLOOR



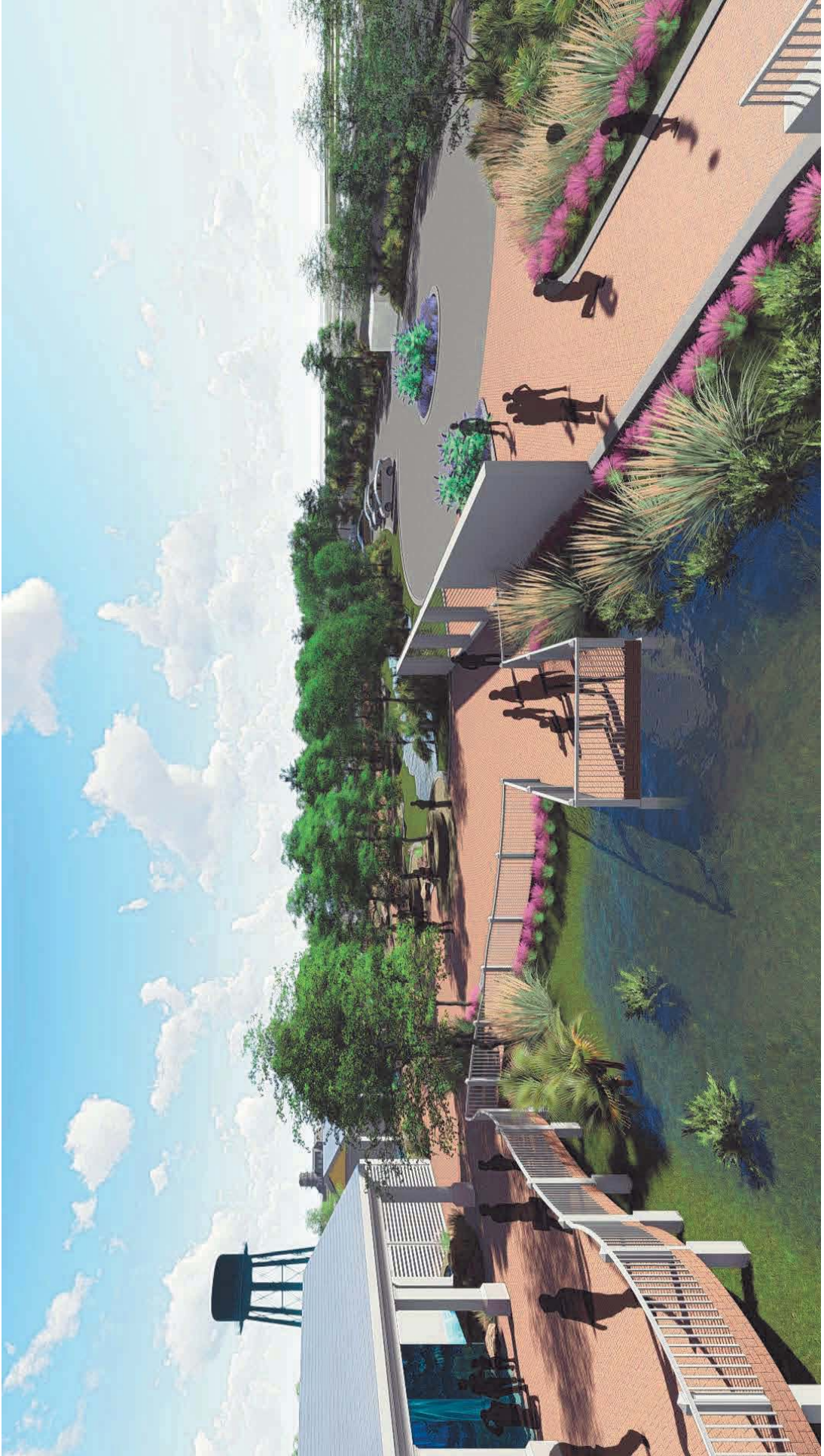










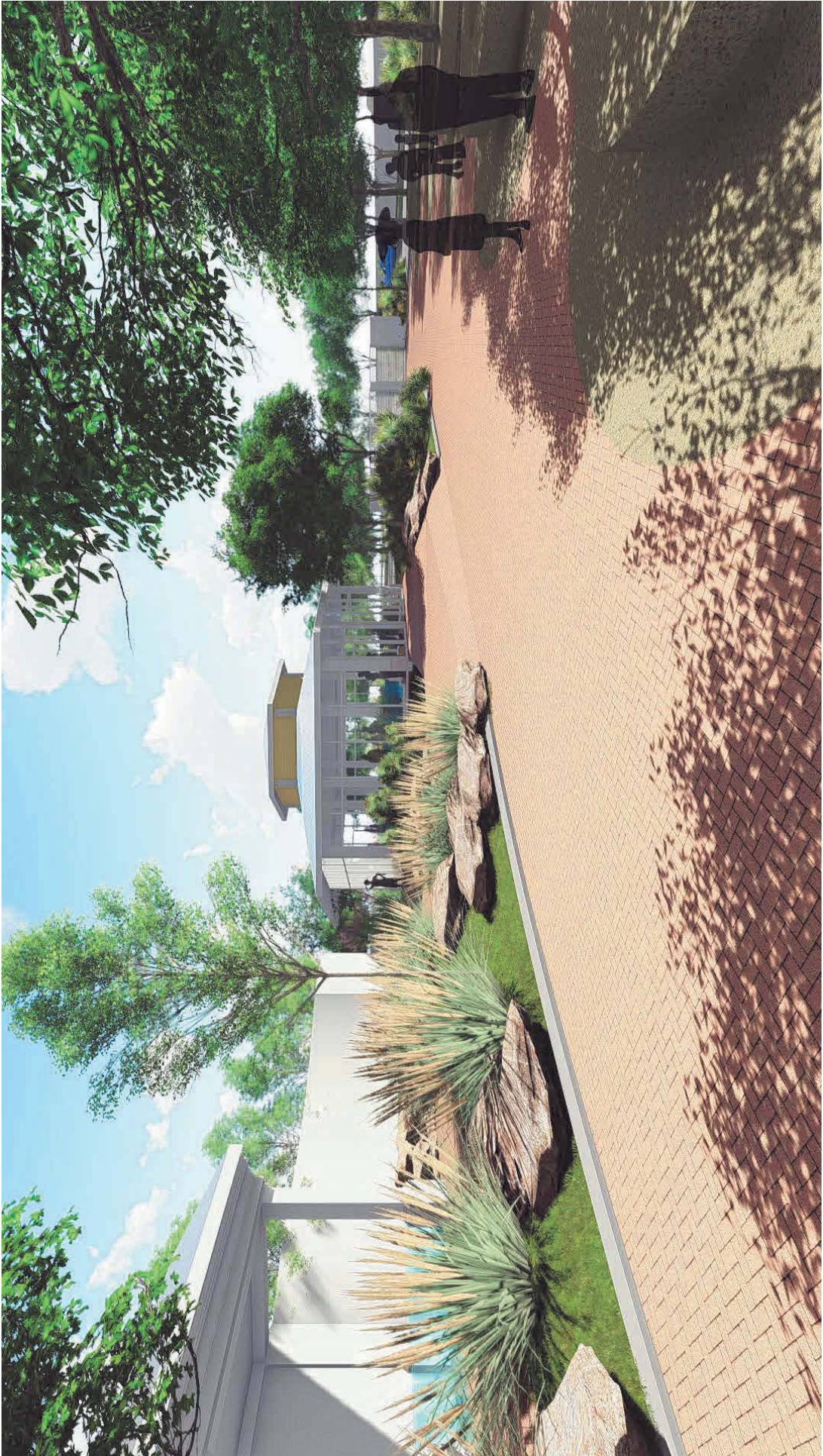














**CITY OF SOUTH PADRE ISLAND
ADVISORY BOARD MEETING
AGENDA REQUEST FORM**

MEETING DATE: August 28, 2019

NAME & TITLE: Ed Caum, CVB Director

DEPARTMENT: South Padre Island Convention and Visitors Bureau

ITEM

Discussion and possible action to approve the following funding requests for special events:

- a. Sand Castle Days
- b. Holiday Sand Castle Village
- c. Lighted Boat Parade
- d. South Possibility Island Weekend
- e. U.S. Lifeguard Association Nationals 2019
- f. U.S. Lifeguard Association Nationals 2020
- g. Open Water Invitational
- h. Veterans Day
- i. SPI Pride

ITEM BACKGROUND

BUDGET/FINANCIAL SUMMARY

COMPREHENSIVE PLAN GOAL

LEGAL REVIEW

Sent to Legal: YES: _____ NO: x _____

Approved by Legal: YES: _____ NO: x _____

Comments:

RECOMMENDATIONS/COMMENTS

**CITY OF SOUTH PADRE ISLAND
ADVISORY BOARD MEETING
AGENDA REQUEST FORM**

MEETING DATE: August 28, 2019

NAME & TITLE: Marisa Amaya, Event Development & Packaging Manager

DEPARTMENT: South Padre Island Convention and Visitors Bureau

ITEM

Discussion and possible action approve the funding request for the 2019 Sand Castle Days event.

ITEM BACKGROUND

Sand Castle Days is a free event open to the general public, which takes place in October and is in-line with our aspirational branding efforts.

The Special Events Committee approved the funding request in the amount of \$35,000 at their regular meeting held on August 21, 2019.

BUDGET/FINANCIAL SUMMARY

02-593-8099 Special Events Budget

COMPREHENSIVE PLAN GOAL

LEGAL REVIEW

Sent to Legal: YES: _____ NO: _____

Approved by Legal: YES: _____ NO: _____

Comments:

RECOMMENDATIONS/COMMENTS

Recommend the Special Events Committee approve a funding amount for this event.

APPLICATION FOR INITIAL FUNDING

Today's Date: 07/25/19

ORGANIZATION INFORMATION

Name of Organization: Clayton Brashear, Clayton's Resort

Address: 6900 Padre Blvd.

City, State, Zip: South Padre Island, TX 78597

Contact Name: Clayton Brashear Contact Email: claytonsbeachbar@aol.com

Contact Office Phone Number: 956-761-5900

Contact Cell Phone Number: 956-455-8436

Web Site Address for Event or Sponsoring Entity: sandcastledays.com

Non-Profit or For-Profit status: Non-profit Tax ID #: 467-31-8779

Entity's Creation Date: _____

Purpose of your organization:

Promote tourism

EVENT INFORMATION

Name of Event: Sandcastle Days 2019

Date(s) of Event: October 3-6, 2019

Primary Location of Event: Clayton's Resort

Amount Requested: \$35,000

Primary Purpose of Funded Activity/Facility:

Promote tourism and preserve a long established event held on South Padre Island for over 30 years.



How will the hotel tax funds be used: (please attach a list of the hotel tax funded expenditures)

Please see attached proposed budget for Sandcastle Days 2019

Percentage of Hotel Tax Support of Related Costs

48 Percentage of Total Event Costs Covered by Hotel Occupancy Tax

 Percentage of Total Annual Facility Costs Covered by Hotel Occupancy Tax for the Funded Event

24 Percentage of Annual Staff Costs Covered by Hotel Occupancy Tax for the Funded Event

If staff costs are covered, estimate percentage of time staff spends annually on the funded event(s) compared to other activities N/A %

Are you asking for any cost reductions for city facility rentals or city services, and if so, please quantify and explain:

No, however, request City provide in-kind service of sand hauling and security as in previous years.

Which Category or Categories Apply to Funding Request & Amount Requested Under Each Category:

- a) **Convention Center or Visitor Information Center:** construction, improvement, equipping, repairing, operation, and maintenance of convention center facilities or visitor information centers, or both. Amount requested under this category: \$ _____
- b) **Registration of Convention Delegates:** furnishing of facilities, personnel, and materials for the registration of convention delegates or registrants. Amount requested under this category: \$ _____
- c) **Advertising, Solicitations, Promotional programs to attract tourists and convention delegates or registrants to the municipality or its vicinity.** Amount requested under this category: \$ _____
- d) **Promotion of the Arts that Directly Enhance Tourism and the Hotel & Convention Industry:** the encouragement, promotion, improvement, and application of the arts that can be shown to have some direct impact on tourism and the hotel/convention industry. The impact may be that the art facility or event can show hotel nights that are booked due to their events or that guest at hotels attend the arts event. Eligible forms of art include instrumental and vocal music, dance, drama, folk art, creative writing, architecture, design and allied fields, painting, sculpture photography, graphic and craft arts, motion picture, radio, television, tape and sound recording, and other arts related to the presentation, performance, execution, and exhibition of these major art forms: \$ 35,000.00
- e) **Historical restoration and preservation projects or activities or advertising and conducting solicitation and promotional programs to encourage tourists and convention delegates to visit preserved historic sites or museums.** Amount requested under this category: \$ _____
- f) **Expenses including promotional expenses, directly related to a sporting event in which the majority of participants are tourists. The event must substantially increase economic activity at hotels within the city or its vicinity.** Amount requested under this category: \$ _____



How many attendees are expected to come to the sporting related event? See UTRGV Report

How many of the attendees at the sporting event are expected to be from another city/county? 80% or more

Quantify how the sporting related event will substantially increase economic activity at hotels within the city or its vicinity?

See UTRGV Economic Impact Report

Funding transportation systems for transporting tourists from hotels to and near the city to any of the following destinations: 1) the commercial center of the city; 2) a convention center in the city; 3) other hotels in or near the city; and 4) tourist attractions in or near the city. Please note that the ridership of any such transportation must be primarily tourists to qualify for hotel tax funding. Amount requested under this category: \$ _____

What sites or attractions will tourists be taken to by this transportation?

Will members of the general public (non-tourists) be riding on this transportation? _____

What percentage of the ridership will be local citizens? _____

Signage directing tourists to sights and attractions that are visited frequently by hotel guests in the municipality. Amount requested under this category: \$ _____

What tourist attractions will be the subject of the signs?

QUESTIONS FOR ALL FUNDING REQUEST CATEGORIES

How many years have you held this Event: 7 years

Expected Attendance: 20-30,000

How many people attending the Event will use South Padre Island lodging establishments? 4,100 room nts

How many nights do you anticipate the majority of the tourists will stay: 2-3

Do you reserve a room block for this event at an area hotel and if so, for how many rooms and at which hotels:

No



List other years (over the last three years) that you have hosted your Event or Project with amount of assistance given from HOT and the number of hotel rooms used:

Month/Year Held	Assistance Amount	Number of Hotel Rooms Used
October 2018	\$35,000.00	N/A
October 2017	\$35,000.00	N/A
October 2016	\$35,000.00	N/A

How will you measure the impact of your event on area hotel activity (e.g.; room block usage information, survey of hoteliers, etc.)?

Survey of hoteliers, UTRGV Economic Impact Report

Please list other organization, government entities, and grants that have offered financial support to your project: N/A

Will the event charge admission? No

Do you anticipate a net profit from the event? No

If there is a net profit, what is the anticipated amount and how will it be used?

All marketing and promotions will be coordinated through the CVA's agency, unless exempted from this requirement by the Executive Director, in which case all creative must be pre-approved by the Executive Director (or designee) and payments will be on a reimbursement basis. Please list all promotion efforts your organization is planning and the amount estimated for each media outlet:

- Newspaper: \$ 1,000
- Radio: \$
- TV: \$ 12,500
- Website, Social Media: \$ 1,000
- Other Paid Advertising: \$ 400

Anticipated Number of Press Releases to Media: 10

Anticipated Number Direct Mailings to out-of-town recipients: N/A

Other Promotions:

A link to the CVB must be included on your promotional handouts and in your website for booking hotel nights during this event. Are you able to comply? Yes No

Will you negotiate a special rate or hotel/event package to attract overnightstays?

Yes

[If we have a tour operator, we will require them to use that service.]

What other marketing initiatives are you planning to promote hotel and convention activity for this event?



What geographic areas does your event reach?
Texas

If the funding requested is related to a permanent facility (e.g. museum, visitor center):

- Expected Visitation by Tourists Monthly/Annually: _____
- Percentage of those who visit the facility who indicate they are staying at area hotels/lodging facilities: _____% (use a visitor log that asks them to check a box if they are staying at an area lodging facility)

What amount of event insurance do you have for your event and who is the carrier:
1,000,000 per occurrence/2,000,000 aggregate/ Carrier - Arch Specialty Insurance Company

[Insert South Padre Island Minimum Event Insurance Coverage Minimums and duty to list South Padre Island as an additionally insured]

Any marketing for the event must be consistent with the brand image for South Padre Island and all such marketing pieces that are funded with hotel tax must be coordinated and developed by the South Padre Island CVB marketing agency. Are you able to comply?

Yes No

Where appropriate, the CVB will require access to event participant database information that will show zip code data to measure likely impact from the funded event.

SUPPLEMENTAL INFORMATION REQUIRED WITH APPLICATION:

Along with the application, please submit the following:

- Proposed Marketing Plan for Funded Event
- Schedule of Activities or Events Relating to the Funded Project
- Complete budget for the Funded Project
- Room night projections, with back-up, for the Funded Event

Submit to complete applications to:

Marisa Amaya
Event Development Manager
C/O City of South Padre Island Convention and Visitors Bureau
7355 Padre Blvd.
South Padre Island, TX 78597
Phone: (956) 761-3834
Email: marisa@sopadre.com



South Padre Island Convention & Visitors Bureau Special Event Applicant Checklist

THIS FORM MUST BE COMPLETED BY APPLICANT

Sandcastle Days 2019

07/25/19

Name of Event

Date Submitted

- Received and understood the separate **Special Events Policy**
- Completed the **South Padre Island Hotel Tax Funding Application form**
- Enclosed a description of all planned activities (or provided in application form)
- Enclosed a sponsor list (categorized by "confirmed" and "pending")
- Enclosed a vendor/exhibitor list (categorized by "confirmed" and "pending")
- Enclosed an event map
- Enclosed security/safety plans
- Enclosed a detailed budget
- Enclosed an advertising and promotion plan
- Enclosed copies of promotional materials (if available)
- Enclosed a summary of previous special event experience of organizer(s)
- Enclosed a history of event (if previously produced)
- Indicated the type(s) of assistance requested
- Indicated the amount of financial support (if requested)

Authorized Signature

07/25/19

Date

Clayton Brashear

Print Name





(<http://sandcastledays.com/>)



Sandcastle Days Schedule of Events

[\(HTTP://SANDCASTLEDAYS.COM/\)](http://sandcastledays.com/) >
[SANDCASTLE DAYS SCHEDULE OF EVENTS \(HTTP://SANDCASTLEDAYS.COM/SCHEDULE/\)](http://sandcastledays.com/schedule/)

Sandcastle Days brings you 5 full days of family-friendly activities and art on the beach.

Sandcastle Days Mercado Open
Thursday - Sunday 10:00 am - Close

Wednesday, October 2nd

Doors Open: 9:00 am

- Masters of Sand carve as a group build Sponsors Sculptures. See them work their magic on the group sandcastle.

Thursday, October 3rd

Doors Open: 9:00 am

- Official start Masters of Sand Competition
- Join the Masters, listen to music and watch them create Unforgettable Sand Art

Friday, October 4th

Doors Open: 9:00 am

- Masters of Sand continue sculpting
- Registration Open – Amateur competition includes: Kids, Family, Groups, and Singles 1 pm – 5 pm
- T-Shirt Sales Open
- Sandcastle Days Mercado
- Live Bands on Stage At Clayton's

Saturday, October 5th

Doors Open 9:00 am

- Sandcamp – Free Sandcastle Lessons beginning at 8:00 am
- Master Sand Sculpting competition final day!
- Sandcastle Days Mercado Open 10:00 am to Close
- Children Water Slides, Bouncer & Bull Riding Open
- Amateur Registration open 8:00 am
- Amateur competition begins at 9:00 am, ends at 3:00 pm / Kids, Family, Group or Singles Castle welcome
- Unlitter Campaign 10th Annual Trashion Show "Straw Wars Theme" at 4:00 pm
- Judging for Amateur and Masters Divisions
- Awards Ceremony for Amateur and Masters Divisions at 4:30 pm
- Live Bands on Stage at Clayton's

Sunday, October 6th

Doors Open: 9:00 am

- Sandcamp – Free Sandcastle Lessons begin at 10:00 am
- Sandcastle Days Mercado
- Children Water Slides, Bouncer & Bull Riding Open
- Enjoy the Sand Monuments, Listen to music and play the day away
- Spread The Word Family Fun For All Ages
- People's Choice Awards at 3:00 pm

➤ Proudly hosted by:



[.http://claytonsbeachbar.com](http://claytonsbeachbar.com)

➤ Book your trip today!



[.http://sopadre.com/](http://sopadre.com/)



[.https://www.facebook.com/sandcastleday](https://www.facebook.com/sandcastleday)

POWERED BY THE [X THEME \(//theme.co/x/\)](http://theme.co/x/)

2019 SANDCASTLE DAYS PROPOSED BUDGET

INCOME:

CVB Sponsorship	\$	35,000.00	
Sponsorships Other	\$	7,400.00	
Vendors	\$	4,500.00	
Amateur Sand Sculptors	\$	50.00	
Total Budgeted Income:	\$		46,950.00

EVENT EXPENSES:

Advertising Digital Marketing	\$	1,000.00	
Advertising Miscellaneous	\$	400.00	
Advertising Print	\$	1,000.00	
Advertising TV	\$	12,500.00	
Total Budgeted Advertising:	\$		14,900.00
Kiddie Rides and Tents	\$		2,500.00
Materials and Supplies	\$		3,000.00
Miscellaneous	\$		1,000.00
Event MC	\$		1,000.00
Security	\$		2,200.00
T-Shirts	\$		250.00
Event Staff Management	\$	1,000.00	
Event Staff Sand Sculptors	\$	10,000.00	
Sand Sculptors Travel Expense	\$	2,500.00	
Sculptors Awards	\$	1,800.00	
Sand Slaves	\$	2,500.00	
Total Budgeted Event Staff:	\$		17,800.00
In-Kind Hotel Rooms	\$	15,000.00	
In-Kind Venue Cost	\$	12,000.00	
In-Kind Outside Food	\$	3,000.00	
Total Budgeted In-Kind Expense:	\$		30,000.00
Total Budgeted Event Expense:	\$		72,650.00

Net Profit/Loss \$ (25,700.00)

2018 SPI Sandcastle Days



Event Attendance

17,400 attendees
5,000 households
4,041 room nights
0.3% change in event day
YoY occupancy



DEMOGRAPHICS

Average age 47
Average Income:
65.7%
\$50,000 or more

\$35,000
CVB Investment

\$2,250,868
Total Spending

\$450

Weighted spending
per household

City tax share



10.5% Lodging = \$70,038
2% F&B sales tax = \$11,030
2% Other sales tax = \$ 16,138
Total = \$97,205

3.48 visitors per
household

2.2 nights spent
on SPI

Total tax ROI = 177.7%
Lodging only ROI = 100.1%



SPI Experience

NET PROMOTER SCORE
likely to recommend
South Padre Island

91.4

97.2%

Likely to
return

98.6%

Satisfied
with SPI

95.9%

Satisfied
with event

**CITY OF SOUTH PADRE ISLAND
ADVISORY BOARD MEETING
AGENDA REQUEST FORM**

MEETING DATE: August 28, 2019

NAME & TITLE: Marisa Amaya, Event Development & Packaging Manager

DEPARTMENT: South Padre Island Convention and Visitors Bureau

ITEM

Discussion and possible action to approve the funding request for the Holiday Sand Castle Village 2019.

ITEM BACKGROUND

The Holiday Sand Castle Village is a free event open to the general public which takes place over several months and is in-line with our aspirational branding efforts.

The Special Events Committee approved the funding request in the amount of \$32,000 at their regular meeting held on August 21, 2019.

BUDGET/FINANCIAL SUMMARY

02-593-8099 Special Events Budget

COMPREHENSIVE PLAN GOAL

LEGAL REVIEW

Sent to Legal: YES: _____ NO: _____

Approved by Legal: YES: _____ NO: _____

Comments:

RECOMMENDATIONS/COMMENTS

Recommend the Special Events Committee approve a funding amount for this event.

APPLICATION FOR INITIAL FUNDING

Today's Date: 07/29/19

ORGANIZATON INFORMATION

Name of Organization: Sandy Feet Sandcastle Services

Address: 117 E. Saturn, P.O. Box 2694

City, State, Zip: South Padre Island, TX 78597

Contact Name: Lucinda Wierenga Contact Email: spiandy@gmail.com

Contact Office Phone Number: 956-459-2928

Contact Cell Phone Number: 956-459-2928

Website Address for Event or Sponsoring Entity: sandyfeetsandcastleservices.com and sandfeet.com

Non-Profit or For-Profit status: For-profit Tax ID #: 385-68-6953

Entity's Creation Date: 1990

Purpose of your organization:

Help people have more fun on the beach forever.

EVENT INFORMATION

Name of Event: Holiday Sand Castle Village

Date(s) of Event: After Thanksgiving through early January 2020

Primary Location of Event: TBD by the SEC & CVAB

Amount Requested: \$32,000

Primary Purpose of Funded Activity/Facility:

Support the holiday by providing a 4-8 week long family-friendly event

How will the hotel tax funds be used: (please attach a list of the hotel tax funded expenditures?)

This request will focus on the sand castle village, building expo and materials

Percentage of Hotel Tax Support of Related Costs

100 Percentage of Total Event Costs Covered by Hotel Occupancy Tax
Percentage of Total Annual Facility Costs Covered by Hotel Occupancy Tax for the Funded Event
Percentage of Annual Staff Costs Covered by Hotel Occupancy Tax for the Funded Event

If staff costs are covered, estimate percentage of time staff spends annually on the funded event(s) compared to other activities %

Are you asking for any cost reductions for city facility rentals or city services, and if so, please quantify and explain:

We are hoping for support on cost for permitting fees.

Which Category or Categories Apply to Funding Request & Amount Requested Under Each Category:

- a) Convention Center or Visitor Information Center: construction, improvement, equipping, repairing, operation, and maintenance of convention center facilities or visitor information centers, or both. Amount requested under this category: \$
b) Registration of Convention Delegates: furnishing of facilities, personnel, and materials for the registration of convention delegates or registrants. Amount requested under this category: \$
c) Advertising, Solicitations, Promotional programs to attract tourists and convention delegates or registrants to the municipality or its vicinity. Amount requested under this category: \$
d) Promotion of the Arts that Directly Enhance Tourism and the Hotel & Convention Industry: the encouragement, promotion, improvement, and application of the arts that can be shown to have some direct impact on tourism and the hotel/convention industry. The impact may be that the art facility or event can show hotel nights that are booked due to their events or that guest at hotels attend the arts event. Eligible forms of art include instrumental and vocal music, dance, drama, folk art, creative writing, architecture, design and allied fields, painting, sculpture photography, graphic and craft arts, motion picture, radio, television, tape and sound recording, and other arts related to the presentation, performance, execution, and exhibition of these major art forms: \$ 32,000
e) Historical restoration and preservation projects or activities or advertising and conducting solicitation and promotional programs to encourage tourists and convention delegates to visit preserved historic sites or museums. Amount requested under this category: \$
f) Expenses including promotional expenses, directly related to a sporting event in which the majority of participants are tourists. The event must substantially increase economic activity at hotels within the city or its vicinity. Amount requested under this category: \$

How many attendees are expected to come to the sporting related event? _____

How many of the attendees are expected to be from more than 75 miles away? _____

Quantify how the sporting related event will substantially increase economic activity at hotels within the city or its vicinity?

- g) **Funding transportation systems for transporting tourists from hotels to and near the city to any of the following destinations: 1) the commercial center of the city; 2) a convention center in the city; 3) other hotels in or near the city; and 4) tourist attractions in or near the city. Please note that the ridership of any such transportation must be primarily tourists to qualify for hotel tax funding.** Amount requested under this category: \$ _____

What sites or attractions will tourists be taken to by this transportation?

Will members of the general public (non-tourists) be riding on this transportation?

What percentage of the ridership will be local citizens? _____

- h) **Signage directing tourists to sights and attractions that are visited frequently by hotel guests in the municipality. Amount requested under this category: \$** _____

What tourist attractions will be the subject of the signs?

QUESTIONS FOR ALL FUNDING REQUEST CATEGORIES

How many years have you held this Event? 1 _____

Expected Attendance: 10,000+ _____

How many people attending the Event will use South Padre Island lodging establishments? 100+ _____

How many nights do you anticipate the majority of the tourists will stay? 1 over multiple weekend _____

Will you reserve a room block for this Event at an area hotel(s)? Yes _____

Where and how many rooms will be blocked?

Will work with the SPI CVB to package the event with local hotels and VRMs.

List other years (over the last three years) that you have hosted your Event or Project with amount of assistance given from HOT and the number of hotel rooms used:

Month/Year Held	Assistance Amount	Number of Hotel Rooms Used
December 2018	\$20,000	
_____	_____	_____
_____	_____	_____

How will you measure the impact of your event on area hotel activity (e.g.; room block usage information, survey of hoteliers, etc.)?

The holiday sandcastle village will be open for at least a month long. We can count how many visitors with a turnstile or go pro video

Please list other organization, government entities, and grants that have offered financial support to your project: _____

Will the event charge admission? No If so, what is the cost per person? _____

Do you anticipate a net profit from the event? No

If there is a net profit, what is the anticipated amount and how will it be used?

All marketing and promotions will be coordinated through the CVA's agency, unless exempted from this requirement by the Executive Director, in which case all creative must be pre-approved by the Executive Director (or designee) and payments will be on a reimbursement basis. Please list all promotion efforts your organization is planning and the amount estimated for each media outlet:

- Newspaper: \$ 2,000.00
- Radio: \$ _____
- TV: \$ _____
- Website, Social Media: \$ 1,000.00
- Other Paid Advertising: \$ _____

Anticipated Number of Press Releases to Media: 5-10

Anticipated Number Direct Emails to out-of-town recipients: 1,000+

Other Promotions: _____

A link to the CVB must be included on your promotional handouts and in your website for booking hotel nights during this event. Are you able to comply? Yes No

Will you negotiate a special rate or hotel/event package to attract overnight stays?
Will work with the SPI CVB to package this event with local hotels and VRMs.

[If we have a tour operator, we will require them to use that service.]

What other marketing initiatives are you planning to promote hotel and convention activity for this event?

Last year, we received publicity from the Rio Grande Valley and central Texas.

SoPadre website, other social media

Who is your target audience? Families

What geographic region(s) are you marketing to?

Rio Grande Valley and central texas

If the funding requested is related to a permanent facility (e.g. museum, visitor center):

- Expected Visitation by Tourists Monthly/Annually: _____
- Percentage of those who visit the facility who indicate they are staying at area hotels/lodging facilities: _____% (use a visitor log that asks them to check a box if they are staying at an area lodging facility)

What amount of event insurance do you have for your event and who is the carrier:

Will be determined at a later date

[Insert South Padre Island Minimum Event Insurance Coverage Minimums and duty to list South Padre Island as an additionally insured]

Any marketing for the event must be consistent with the brand image for South Padre Island and all such marketing pieces that are funded with hotel tax must be coordinated and developed by the South Padre Island CVB marketing agency. Are you able to comply?

Yes No

Where appropriate, the CVB will require access to event participant database information that will show zip code data to measure likely impact from the funded event.

Submit to complete applications to:

Marisa Amaya
Event Development Manager
C/O City of South Padre Island Convention and Visitors Bureau
7355 Padre Blvd.
South Padre Island, TX 78597
Phone: (956) 761-3834
Email: marisa@sopadre.com

South Padre Island Convention & Visitors Bureau Special Event Applicant Checklist

THIS FORM MUST BE COMPLETED BY APPLICANT

Holiday Sandcastle Village
Name of Event

8/12/19
Date Submitted

- Received and understood the separate **Special Events Policy**
- Received and understood the separate **HOT Funding Guidelines**
- Completed the **South Padre Island Hotel Tax Funding Application** form
- Enclosed a description of all planned activities or schedule of events (REQUIRED)**
- Enclosed a sponsor list (categorized by "confirmed" and "pending")
- Enclosed a vendor/exhibitor list (categorized by "confirmed" and "pending")
- Enclosed an event map
- Enclosed security/safety plans
- Enclosed a complete detailed budget (REQUIRED)**
- Enclosed an advertising/marketing and promotion plan (REQUIRED)**
- Enclosed copies of promotional materials (if available)
- Enclosed a summary of previous special event experience of organizer(s)
- Enclosed a history of event (if previously produced)
- Indicated the type(s) of assistance requested
- In Room night projections, with back-up, for the Funded Event (REQUIRED)**
- Indicated the amount of financial support (if requested)

Lucinda Wierenga
Authorized Signature

8/12/19
Date

Lucinda Wierenga
Print Name

Holiday Sand Castle Village

Dec. 2019 | 6 WEEK EVENT

Vendor/ Other Expenses	Description	Budget:
OPERATIONS		
Sculptors	Sand Sculptors	\$13,500.00
Holiday SC Village	Decorations and lights	\$1,000.00
Coastal Security Services	Security	\$4,200.00
City of SPI Shoreline - Sand	8-10 Truck loads - \$200 Per TL	\$1,600.00
Art Services	Signs for Sand Castles	\$285.00
Coastal Event Rentals	40x40 tent for sand castles	\$5,710.00
Front Loader	Two Days	\$1,000.00
Pounder		\$500.00
Marketing and Advertising		\$3,000.00
Misc. Expenses	minor expenses for glue, doubleheaded nails, straps, etc. plus ice and cold drinks for the workers	\$250.00
DONATED EXPENSES		
Hotel Stays		
Meals		
Golf Carts		
Forms, hoses and hose parts	Donation from Clayton's	

Total: \$31,045.00

**CITY OF SOUTH PADRE ISLAND
ADVISORY BOARD MEETING
AGENDA REQUEST FORM**

MEETING DATE: August 28, 2019

NAME & TITLE: Marisa Amaya, Event Development & Packaging Manager

DEPARTMENT: South Padre Island Convention and Visitors Bureau

ITEM

Discussion and possible action approve the funding request for the 2019 Lighted Boat Parade.

ITEM BACKGROUND

The Holiday Boat Parade is a free event open to the general public which takes place in December and is in-line with our aspirational branding efforts.

The Special Events Committee approved the funding request in the amount of \$3,000 at their regular meeting held Tuesday, August 21, 2019.

BUDGET/FINANCIAL SUMMARY

02-593-8099 Special Events Budget

COMPREHENSIVE PLAN GOAL

LEGAL REVIEW

Sent to Legal: YES: _____ NO: _____

Approved by Legal: YES: _____ NO: _____

Comments:

RECOMMENDATIONS/COMMENTS

Recommend the approve a funding amount for this event.

APPLICATION FOR INITIAL FUNDING

Today's Date: 08/02/2019

ORGANIZATON INFORMATION

Name of Organization: South Padre Island CVB

Address: 7355 Padre Blvd.

City, State, Zip: South Padre Island, TX 78597

Contact Name: Marisa Amaya Contact Email: marisa@sopadre.com

Contact Office Phone Number: 956-761-3000

Contact Cell Phone Number: _____

Website Address for Event or Sponsoring Entity: sopadre.com

Non-Profit or For-Profit status: Non-profit Tax ID #: _____

Entity's Creation Date: 2017

Purpose of your organization:

EVENT INFORMATION

Name of Event: Lighted Boat Parade 2019

Date(s) of Event: 12/07/2019

Primary Location of Event: Entertainment District/Laguna Madre Bay

Amount Requested: \$3,000

Primary Purpose of Funded Activity/Facility:

Provide family-friendly entertainment in support of the City's Holiday program,
and to continue 30+ year long-standing tradition of the Lighted Boat Parade.

How will the hotel tax funds be used: (please attach a list of the hotel tax funded expenditures?)

To support the operations of the lighted boat parade

Percentage of Hotel Tax Support of Related Costs

100 Percentage of Total Event Costs Covered by Hotel Occupancy Tax

_____ Percentage of Total Annual Facility Costs Covered by Hotel Occupancy Tax for the Funded Event

_____ Percentage of Annual Staff Costs Covered by Hotel Occupancy Tax for the Funded Event

If staff costs are covered, estimate percentage of time staff spends annually on the funded event(s) compared to other activities _____ %

Are you asking for any cost reductions for city facility rentals or city services, and if so, please quantify and explain:

Which Category or Categories Apply to Funding Request & Amount Requested Under Each Category:

- a) **Convention Center or Visitor Information Center:** construction, improvement, equipping, repairing, operation, and maintenance of convention center facilities or visitor information centers, or both. Amount requested under this category: \$ _____
- b) **Registration of Convention Delegates:** furnishing of facilities, personnel, and materials for the registration of convention delegates or registrants. Amount requested under this category: \$ _____
- c) **Advertising, Solicitations, Promotional programs to attract tourists and convention delegates** or registrants to the municipality or its vicinity. Amount requested under this category: \$ _____
- d) **Promotion of the Arts that Directly Enhance Tourism and the Hotel & Convention Industry:** the encouragement, promotion, improvement, and application of the arts that can be shown to have some direct impact on tourism and the hotel/convention industry. The impact may be that the art facility or event can show hotel nights that are booked due to their events or that guest at hotels attend the arts event. Eligible forms of art include instrumental and vocal music, dance, drama, folk art, creative writing, architecture, design and allied fields, painting, sculpture photography, graphic and craft arts, motion picture, radio, television, tape and sound recording, and other arts related to the presentation, performance, execution, and exhibition of these major art forms: \$ 3,000
- e) **Historical restoration and preservation projects or activities or advertising and conducting solicitation and promotional programs to encourage tourists and convention delegates to visit preserved historic sites or museums.** Amount requested under this category: \$ _____
- f) **Expenses including promotional expenses, directly related to a sporting event in which the majority of participants are tourists. The event must substantially increase economic activity at hotels within the city or its vicinity.** Amount requested under this category: \$ _____

How many attendees are expected to come to the sporting related event? _____

How many of the attendees are expected to be from more than 75 miles away? _____

Quantify how the sporting related event will substantially increase economic activity at hotels within the city or its vicinity?

- g) **Funding transportation systems for transporting tourists from hotels to and near the city to any of the following destinations: 1) the commercial center of the city; 2) a convention center in the city; 3) other hotels in or near the city; and 4) tourist attractions in or near the city. Please note that the ridership of any such transportation must be primarily tourists to qualify for hotel tax funding. Amount requested under this category: \$** _____

What sites or attractions will tourists be taken to by this transportation?

Will members of the general public (non-tourists) be riding on this transportation?

What percentage of the ridership will be local citizens? _____

- h) **Signage directing tourists to sights and attractions that are visited frequently by hotel guests in the municipality. Amount requested under this category: \$** _____

What tourist attractions will be the subject of the signs?

QUESTIONS FOR ALL FUNDING REQUEST CATEGORIES

How many years have you held this Event? 2 by CVB (over 30 total)

Expected Attendance: 1,000+

How many people attending the Event will use South Padre Island lodging establishments? 100

How many nights do you anticipate the majority of the tourists will stay? 1-2

Will you reserve a room block for this Event at an area hotel(s)? Yes

Where and how many rooms will be blocked?

The South Padre Island CVB will package this event with local hotels and VRMs.

List other years (over the last three years) that you have hosted your Event or Project with amount of assistance given from HOT and the number of hotel rooms used:

Month/Year Held	Assistance Amount	Number of Hotel Rooms Used
December 2018	\$3,000	81
_____	_____	_____
_____	_____	_____

How will you measure the impact of your event on area hotel activity (e.g.; room block usage information, survey of hoteliers, etc.)?

Surveys and room block information

Please list other organization, government entities, and grants that have offered financial support to your project: _____

Will the event charge admission? No If so, what is the cost per person? _____

Do you anticipate a net profit from the event? No

If there is a net profit, what is the anticipated amount and how will it be used?

All marketing and promotions will be coordinated through the CVA's agency, unless exempted from this requirement by the Executive Director, in which case all creative must be pre-approved by the Executive Director (or designee) and payments will be on a reimbursement basis. Please list all promotion efforts your organization is planning and the amount estimated for each media outlet:

- Newspaper: \$ _____
- Radio: \$ _____
- TV: \$ _____
- Website, Social Media: \$ 200.00
- Other Paid Advertising: \$ _____

Anticipated Number of Press Releases to Media: 10

Anticipated Number Direct Emails to out-of-town recipients: 1,000

Other Promotions: LBP flyers in all CVB sponsored fishing tournaments from August to November

A link to the CVB must be included on your promotional handouts and in your website for booking hotel nights during this event. Are you able to comply? Yes No

Will you negotiate a special rate or hotel/event package to attract overnight stays?

Yes

[If we have a tour operator, we will require them to use that service.]

What other marketing initiatives are you planning to promote hotel and convention activity for this event?

SoPadre website, Facebook, Instagram, Twitter and TAG

Who is your target audience? Families

What geographic region(s) are you marketing to?

Rio Grande Valley

If the funding requested is related to a permanent facility (e.g. museum, visitor center):

- Expected Visitation by Tourists Monthly/Annually: _____
- Percentage of those who visit the facility who indicate they are staying at area hotels/lodging facilities: _____% (use a visitor log that asks them to check a box if they are staying at an area lodging facility)

What amount of event insurance do you have for your event and who is the carrier:

1,000,000

[Insert South Padre Island Minimum Event Insurance Coverage Minimums and duty to list South Padre Island as an additionally insured]

Any marketing for the event must be consistent with the brand image for South Padre Island and all such marketing pieces that are funded with hotel tax must be coordinated and developed by the South Padre Island CVB marketing agency. Are you able to comply?

Yes No

Where appropriate, the CVB will require access to event participant database information that will show zip code data to measure likely impact from the funded event.

Submit to complete applications to:

Marisa Amaya
Event Development Manager
C/O City of South Padre Island Convention and Visitors Bureau
7355 Padre Blvd.
South Padre Island, TX 78597
Phone: (956) 761-3834
Email: marisa@sopadre.com



Lighted Boat Parade-2019

2019 | 7 December

Food and Drinks	Quantity	Details	Budget
Awards Dinner (usually at Louie's Backyard)	200	Buffet dinner for captains and awards	\$1,000.00
			\$1,000.00
Other	Details		Budget
Boat Numbers	2 reflective banners for numbers 1-30		\$800.00
Social Media Marketing	Other marketing is already budgeted in		\$200.00
Commerative Token			\$500.00
Operations expenses			\$500.00
			\$2,000.00
TOTAL			\$3,000.00

Annual Christmas Lighted Boat Parade

Saturday, December 7, 2019

Schedule of Events:

- **A MUST ATTEND MEETING** prior to the event of **ALL BOAT CAPTAINS** or their designated representatives will be held at **Will and Jack's Burger Shack at 2:00 p.m.**
- Boat Numbers and instructions will be given out.
- Boats will rendezvous at **Southpoint Marina on Saturday at 5:30 p.m.**
- Parade begins at **Southpoint Marina in Port Isabel at 6:00 p.m.**
 - o Designated viewing locations throughout the route will offer public viewing.
 - o See map for visual route.
- Boats will loop/make a turn near Pirate's Landing.
- Boats will continue across the Laguna Madre Bay.
- Parade continues through the channel by the "Entertainment District".
- Judging will take place near The Greens/Jim's Pier/Painted Marlin (TBD).
- Captains will dock their boats.
- Captain's dinner and awards will take place at Louie's Backyard.

Schedule is tentative.

*In the event of inclement weather, the parade will be postponed to Saturday,
December 14, 2019.*

**CITY OF SOUTH PADRE ISLAND
ADVISORY BOARD MEETING
AGENDA REQUEST FORM**

MEETING DATE: August 28, 2019

NAME & TITLE: Marisa Amaya, Event Development & Packaging Manager

DEPARTMENT: South Padre Island Convention and Visitors Bureau

ITEM

Discussion and possible action approve the funding request for the 2019 South Possibility Island Weekend.

ITEM BACKGROUND

The 2019 South Possibility Island Weekend is a new event for the upcoming fiscal year. The funding request is in the amount of \$5,000.

The Special Events Committee denied the funding request at their regular meeting held Tuesday, August 21, 2019.

BUDGET/FINANCIAL SUMMARY

02-593-8099 Special Events Budget

COMPREHENSIVE PLAN GOAL

LEGAL REVIEW

Sent to Legal: YES: _____ NO: _____

Approved by Legal: YES: _____ NO: _____

Comments:

RECOMMENDATIONS/COMMENTS

APPLICATION FOR INITIAL FUNDING

Today's Date: 08/14/19

ORGANIZATON INFORMATION

Name of Organization: Fishing's Future

Address: 2216 Padre Blvd Suite B #26

City, State, Zip: South Padre Island, TX 78597

Contact Name: Shane Wilson Contact Email: shane@fishingsfuture.org

Contact Office Phone Number: 956-238-9476

Contact Cell Phone Number: 956-238-9476

Website Address for Event or Sponsoring Entity: fishingsfuture.org

Non-Profit or For-Profit status: Non-profit Tax ID #: 20-8782271

Entity's Creation Date: 2007

Purpose of your organization:

Reconnect kids to nature, reconnect kids to family and strengthen family relationships.

Teach Environmental Stewardship and Increase awareness for the protection, conservation

and restoration of our Nation's aquatic natural resources.

EVENT INFORMATION

Name of Event: South Possibility Island Weekend

Date(s) of Event: November 1-3, 2019

Primary Location of Event: _____

Amount Requested: \$5,000

Primary Purpose of Funded Activity/Facility:

Fishing's Future will work to open up the possibilities for families living with disabilities.

With the Capable Kids Foundation, we will provide a weekend of family-friendly fun and activities across the island.

How will the hotel tax funds be used: (please attach a list of the hotel tax funded expenditures?)

They will be used for marketing of the event, and operational costs that may arise.

Percentage of Hotel Tax Support of Related Costs

15% Percentage of Total Event Costs Covered by Hotel Occupancy Tax

0% Percentage of Total Annual Facility Costs Covered by Hotel Occupancy Tax for the Funded Event

0% Percentage of Annual Staff Costs Covered by Hotel Occupancy Tax for the Funded Event

If staff costs are covered, estimate percentage of time staff spends annually on the funded event(s) compared to other activities _____%

Are you asking for any cost reductions for city facility rentals or city services, and if so, please quantify and explain:

Yes, we will be asking the SPI Fire Department for usage of their mobi-chair floating beach wheel-chairs.

Which Category or Categories Apply to Funding Request & Amount Requested Under Each Category:

- a) **Convention Center or Visitor Information Center:** construction, improvement, equipping, repairing, operation, and maintenance of convention center facilities or visitor information centers, or both. Amount requested under this category: \$ _____
- b) **Registration of Convention Delegates:** furnishing of facilities, personnel, and materials for the registration of convention delegates or registrants. Amount requested under this category: \$ _____
- c) **Advertising, Solicitations, Promotional programs to attract tourists and convention delegates** or registrants to the municipality or its vicinity. Amount requested under this category: \$ \$5,000
- d) **Promotion of the Arts that Directly Enhance Tourism and the Hotel & Convention Industry:** the encouragement, promotion, improvement, and application of the arts that can be shown to have some direct impact on tourism and the hotel/convention industry. The impact may be that the art facility or event can show hotel nights that are booked due to their events or that guest at hotels attend the arts event. Eligible forms of art include instrumental and vocal music, dance, drama, folk art, creative writing, architecture, design and allied fields, painting, sculpture photography, graphic and craft arts, motion picture, radio, television, tape and sound recording, and other arts related to the presentation, performance, execution, and exhibition of these major art forms: \$ _____
- e) **Historical restoration and preservation projects or activities or advertising and conducting solicitation and promotional programs to encourage tourists and convention delegates to visit preserved historic sites or museums.** Amount requested under this category: \$ _____
- f) **Expenses including promotional expenses, directly related to a sporting event in which the majority of participants are tourists. The event must substantially increase economic activity at hotels within the city or its vicinity.** Amount requested under this category: \$ _____

How many attendees are expected to come to the sporting related event? _____

How many of the attendees are expected to be from more than 75 miles away? _____

Quantify how the sporting related event will substantially increase economic activity at hotels within the city or its vicinity?

- g) **Funding transportation systems for transporting tourists from hotels to and near the city to any of the following destinations: 1) the commercial center of the city; 2) a convention center in the city; 3) other hotels in or near the city; and 4) tourist attractions in or near the city. Please note that the ridership of any such transportation must be primarily tourists to qualify for hotel tax funding. Amount requested under this category: \$** _____

What sites or attractions will tourists be taken to by this transportation?

Will members of the general public (non-tourists) be riding on this transportation?

What percentage of the ridership will be local citizens? _____

- h) **Signage directing tourists to sights and attractions that are visited frequently by hotel guests in the municipality. Amount requested under this category: \$** _____

What tourist attractions will be the subject of the signs?

QUESTIONS FOR ALL FUNDING REQUEST CATEGORIES

How many years have you held this Event? 0

Expected Attendance: 1,000

How many people attending the Event will use South Padre Island lodging establishments? 25%

How many nights do you anticipate the majority of the tourists will stay? 2

Will you reserve a room block for this Event at an area hotel(s)? Yes

Where and how many rooms will be blocked?

We are working with the SPI CVB to partner with local hotels and VRMs.

List other years (over the last three years) that you have hosted your Event or Project with amount of assistance given from HOT and the number of hotel rooms used:

Month/Year Held	Assistance Amount	Number of Hotel Rooms Used
_____	_____	_____
_____	_____	_____
_____	_____	_____

How will you measure the impact of your event on area hotel activity (e.g.; room block usage information, survey of hoteliers, etc.)?

Room block information and surveys during registration.

Please list other organization, government entities, and grants that have offered financial support to your project: _____

Will the event charge admission? No If so, what is the cost per person? _____

Do you anticipate a net profit from the event? No

If there is a net profit, what is the anticipated amount and how will it be used?

N/A

All marketing and promotions will be coordinated through the CVA's agency, unless exempted from this requirement by the Executive Director, in which case all creative must be pre-approved by the Executive Director (or designee) and payments will be on a reimbursement basis. Please list all promotion efforts your organization is planning and the amount estimated for each media outlet:

- Newspaper: \$ _____
- Radio: \$ _____
- TV: \$ _____
- Website, Social Media: \$ 1,000.00
- Other Paid Advertising: \$ 1,000.00

Anticipated Number of Press Releases to Media: 5-10

Anticipated Number Direct Emails to out-of-town recipients: 1,000+

Other Promotions: _____

A link to the CVB must be included on your promotional handouts and in your website for booking hotel nights during this event. Are you able to comply? Yes No

Will you negotiate a special rate or hotel/event package to attract overnight stays?

Yes

[If we have a tour operator, we will require them to use that service.]

What other marketing initiatives are you planning to promote hotel and convention activity for this event?

Ronnie Greene, who is the host of "A Fishing Story" will be interviewing Fishing's Future in October 2019. He is broadcast on ESPN, Cabela's and World Fishing Network.

Who is your target audience? Families with disabilities

What geographic region(s) are you marketing to?

Upper Rio Grande Valley, and across the U.S. - as we have Fishing's Future Chapters located throughout the nation

If the funding requested is related to a permanent facility (e.g. museum, visitor center):

- Expected Visitation by Tourists Monthly/Annually: _____
- Percentage of those who visit the facility who indicate they are staying at area hotels/lodging facilities: _____% (use a visitor log that asks them to check a box if they are staying at an area lodging facility)

What amount of event insurance do you have for your event and who is the carrier:

TBD

[Insert South Padre Island Minimum Event Insurance Coverage Minimums and duty to list South Padre Island as an additionally insured]

Any marketing for the event must be consistent with the brand image for South Padre Island and all such marketing pieces that are funded with hotel tax must be coordinated and developed by the South Padre Island CVB marketing agency. Are you able to comply?

Yes No

Where appropriate, the CVB will require access to event participant database information that will show zip code data to measure likely impact from the funded event.

Submit to complete applications to:

Marisa Amaya
Event Development Manager
C/O City of South Padre Island Convention and Visitors Bureau
7355 Padre Blvd.
South Padre Island, TX 78597
Phone: (956) 761-3834
Email: marisa@sopadre.com



South Possibility Island Weekend

Friday, November 1st – Sunday, November 3rd

Friday, November 1st

- Check in to hotels/VRMs
- Welcome Event & Registration at Sea Turtle, Inc.

Saturday, November 2nd

9 a.m. to 12 p.m.

Family Fish Camp at The Greens
Surfing Lessons by Surfrider Foundation

Noon

Lunch at different restaurants across the island

1 p.m. to 3 p.m.

Head boats for fishing & eco tours
Sand castle lessons
SPI Birding, Nature and Alligator Sanctuary

4 p.m.

SPI Mariachi Run *(already spoke with promoter for a discount code)*

Sunday, November 3rd

- Options of Breakfast with the Turtles or Breakfast with the Pirates
- Closing Ceremony & "Thank You"

Schedule is tentative.

**CITY OF SOUTH PADRE ISLAND
ADVISORY BOARD MEETING
AGENDA REQUEST FORM**

MEETING DATE: August 28, 2019

NAME & TITLE: Marisa Amaya, Event Development & Packaging Manager

DEPARTMENT: South Padre Island Convention and Visitors Bureau

ITEM

Discussion and possible action approve the funding request for the 2019 U.S. Lifeguard Association National event.

ITEM BACKGROUND

The 2019 U.S. Lifeguard Association (USLA) request consists of the \$25,000 licensing fee required to bid and host the actual event in 2020.

The Special Events Committee approved the funding request in the amount of \$25,000 at their regular meeting held Tuesday, August 21, 2019.

BUDGET/FINANCIAL SUMMARY

02-593-8099 Special Events Budget

COMPREHENSIVE PLAN GOAL

LEGAL REVIEW

Sent to Legal: YES: _____ NO: _____

Approved by Legal: YES: _____ NO: _____

Comments:

RECOMMENDATIONS/COMMENTS

Recommend to approve the funding request.

APPLICATION FOR INITIAL FUNDING

Today's Date: 08/02/2019

ORGANIZATON INFORMATION

Name of Organization: South Padre Island CVB

Address: 7355 Padre Blvd.

City, State, Zip: South Padre Island, TX 78597

Contact Name: Marisa Amaya Contact Email: marisa@sopadre.com

Contact Office Phone Number: 956-761-3000

Contact Cell Phone Number: _____

Website Address for Event or Sponsoring Entity: sopadre.com

Non-Profit or For-Profit status: Non-profit Tax ID #: _____

Entity's Creation Date: _____

Purpose of your organization:

EVENT INFORMATION

Name of Event: 2019 Licensing Fee (U.S. Lifeguard Association Nationals 2020)

Date(s) of Event: August 4, 2020 - August 8, 2020

Primary Location of Event: Isla Grand Beach Resort

Amount Requested: \$25,000

Primary Purpose of Funded Activity/Facility:

Generate overnight stays, mid-week

How will the hotel tax funds be used: (please attach a list of the hotel tax funded expenditures?)

\$25,000 will be for the licensing fee for USLA

Percentage of Hotel Tax Support of Related Costs

100% Percentage of Total Event Costs Covered by Hotel Occupancy Tax

_____ Percentage of Total Annual Facility Costs Covered by Hotel Occupancy Tax for the Funded Event

_____ Percentage of Annual Staff Costs Covered by Hotel Occupancy Tax for the Funded Event

If staff costs are covered, estimate percentage of time staff spends annually on the funded event(s) compared to other activities _____ %

Are you asking for any cost reductions for city facility rentals or city services, and if so, please quantify and explain:

Yes - with permitting

Which Category or Categories Apply to Funding Request & Amount Requested Under Each Category:

- a) **Convention Center or Visitor Information Center:** construction, improvement, equipping, repairing, operation, and maintenance of convention center facilities or visitor information centers, or both. Amount requested under this category: \$ _____
- b) **Registration of Convention Delegates:** furnishing of facilities, personnel, and materials for the registration of convention delegates or registrants. Amount requested under this category: \$ _____
- c) **Advertising, Solicitations, Promotional programs to attract tourists and convention delegates** or registrants to the municipality or its vicinity. Amount requested under this category: \$ _____
- d) **Promotion of the Arts that Directly Enhance Tourism and the Hotel & Convention Industry:** the encouragement, promotion, improvement, and application of the arts that can be shown to have some direct impact on tourism and the hotel/convention industry. The impact may be that the art facility or event can show hotel nights that are booked due to their events or that guest at hotels attend the arts event. Eligible forms of art include instrumental and vocal music, dance, drama, folk art, creative writing, architecture, design and allied fields, painting, sculpture photography, graphic and craft arts, motion picture, radio, television, tape and sound recording, and other arts related to the presentation, performance, execution, and exhibition of these major art forms: \$ _____
- e) **Historical restoration and preservation projects or activities or advertising and conducting solicitation and promotional programs to encourage tourists and convention delegates to visit preserved historic sites or museums.** Amount requested under this category: \$ _____
- f) **Expenses including promotional expenses, directly related to a sporting event in which the majority of participants are tourists. The event must substantially increase economic activity at hotels within the city or its vicinity.** Amount requested under this category: \$ 25,000.00

How many attendees are expected to come to the sporting related event? 1,400

How many of the attendees are expected to be from more than 75 miles away? 95%

Quantify how the sporting related event will substantially increase economic activity at hotels within the city or its vicinity?

The multi-day event is typically held on the east coast or west coast. This year the event is held in central US, prompting for more attendance. Nearly all attendees must travel to compete, prompting over night stays.

- g) **Funding transportation systems for transporting tourists from hotels to and near the city to any of the following destinations: 1) the commercial center of the city; 2) a convention center in the city; 3) other hotels in or near the city; and 4) tourist attractions in or near the city. Please note that the ridership of any such transportation must be primarily tourists to qualify for hotel tax funding.** Amount requested under this category: \$ _____

What sites or attractions will tourists be taken to by this transportation?

Will members of the general public (non-tourists) be riding on this transportation?

What percentage of the ridership will be local citizens? _____

- h) **Signage directing tourists to sights and attractions that are visited frequently by hotel guests in the municipality. Amount requested under this category: \$** _____

What tourist attractions will be the subject of the signs?

QUESTIONS FOR ALL FUNDING REQUEST CATEGORIES

How many years have you held this Event? 0

Expected Attendance: 1,400

How many people attending the Event will use South Padre Island lodging establishments? 95%

How many nights do you anticipate the majority of the tourists will stay? 2-3

Will you reserve a room block for this Event at an area hotel(s)? Yes

Where and how many rooms will be blocked?

The SPI CVB has created room blocks at 3 hotels.

List other years (over the last three years) that you have hosted your Event or Project with amount of assistance given from HOT and the number of hotel rooms used:

Month/Year Held	Assistance Amount	Number of Hotel Rooms Used
N/A	N/A	N/A

How will you measure the impact of your event on area hotel activity (e.g.; room block usage information, survey of hoteliers, etc.)?

Survey and room block information

Please list other organization, government entities, and grants that have offered financial support to your project: _____

Will the event charge admission? No If so, what is the cost per person? _____

Do you anticipate a net profit from the event? No

If there is a net profit, what is the anticipated amount and how will it be used?

N/A

All marketing and promotions will be coordinated through the CVA's agency, unless exempted from this requirement by the Executive Director, in which case all creative must be pre-approved by the Executive Director (or designee) and payments will be on a reimbursement basis. Please list all promotion efforts your organization is planning and the amount estimated for each media outlet:

- Newspaper: \$ _____
- Radio: \$ _____
- TV: \$ _____
- Website, Social Media: \$ _____
- Other Paid Advertising: \$ _____

Anticipated Number of Press Releases to Media: 2

Anticipated Number Direct Emails to out-of-town recipients: 2 - through the nonprofit

Other Promotions: Attended the 2019 USLA nationals in Virginia Beach, VA

A link to the CVB must be included on your promotional handouts and in your website for booking hotel nights during this event. Are you able to comply? Yes No

Will you negotiate a special rate or hotel/event package to attract overnight stays?

Yes

[If we have a tour operator, we will require them to use that service.]

What other marketing initiatives are you planning to promote hotel and convention activity for this event?

SoPadre website, Facebook, Instagram, Twitter and TAG

Who is your target audience? Lifeguard associations and families

What geographic region(s) are you marketing to?

All lifeguard associations across the nation

If the funding requested is related to a permanent facility (e.g. museum, visitor center):

- Expected Visitation by Tourists Monthly/Annually: _____
- Percentage of those who visit the facility who indicate they are staying at area hotels/lodging facilities: _____% (use a visitor log that asks them to check a box if they are staying at an area lodging facility)

What amount of event insurance do you have for your event and who is the carrier:

\$1,000,000

[Insert South Padre Island Minimum Event Insurance Coverage Minimums and duty to list South Padre Island as an additionally insured]

Any marketing for the event must be consistent with the brand image for South Padre Island and all such marketing pieces that are funded with hotel tax must be coordinated and developed by the South Padre Island CVB marketing agency. Are you able to comply?

Yes No

Where appropriate, the CVB will require access to event participant database information that will show zip code data to measure likely impact from the funded event.

Submit to complete applications to:

Marisa Amaya
Event Development Manager
C/O City of South Padre Island Convention and Visitors Bureau
7355 Padre Blvd.
South Padre Island, TX 78597
Phone: (956) 761-3834
Email: marisa@sopadre.com

USLA

Locations	Contact Person/ Phone #	Contact Email
Isla Grand Beach Resort - Host	Sylvia Soliz	
Pearl - Overflow		
Schlitterbahn Beach Resort	Mike Bigelow	mbigelow@schlitterbahn.com
Vendor	Main Contact Person/ Phone #	Vendor Email
Coastal Event Rentals	Jaime Barbosa - 956.343.7884	jaime@coastaleventrentalsrgv.com
Rental World	Angie Wolfe - 956.501.6278	awolfe@rentalworld.com

In-Kind	Notes/Descriptions	In-Kind Costs	Expenditures
Stickers, Coupon, Bags		In-Kind	\$0.00
Towels		In-Kind	\$0.00
Promotional items		In-Kind	\$0.00
Coupons and Officials dinner		In-Kind	\$0.00
Sunscreen Samples		In-Kind	\$0.00
Officials Lunch		In-Kind	\$0.00
Permitting		In-Kind	\$0.00
Banners		In-Kind	\$0.00
Signage		In-Kind	\$0.00
Registration Rooms		In-Kind	\$0.00

Vendor/ Other Expenses	Description	Budget:	\$65,000.00
Company Name	Awards	\$	375.00
	TV's	\$	1,500.00
	Competitor Writbands	\$	675.00
	Course Flags	\$	1,100.00
	Port-a-potties	\$	600.00
	Stopwatches for officials	\$	60.00
	3000 Lanyards for Badges	\$	475.00
	Whistles for Officials	\$	160.00
	1,500 Event Programs	\$	3,600.00
	Course Set Up	\$	1,000.00
	Tent Rental	\$	20,000.00
	Bleachers	\$	6,000.00
	Miscellaneous Tools for equipment	\$	450.00
	Staff Shirts	\$	750.00
	Scoring Forms	\$	150.00
	Inflatable Buoys	\$	400.00
	Cable/Wifi	\$	500.00
	Podum for awards	\$	100.00
	Videography and generator	\$	1,600.00
	Overnight Security	\$	1,300.00
	Photography	\$	1,000.00
	Various Sponsor Shipments	\$	100.00
	Gatorade, Plastic Bins	\$	120.00
	Miscellaneous - 1 TV, snacks	\$	1,000.00
	Produce - Lifeguards	\$	400.00
	Junior Day Lunch	\$	1,100.00
	Hotel room nights for officials	\$	15,000.00
	Officials Lunch	\$	1,100.00
	Committee and Officials Break Rooms	\$	4,800.00
	Estimated Budget	\$	65,415.00
		Remaining	\$65,000.00

**CITY OF SOUTH PADRE ISLAND
ADVISORY BOARD MEETING
AGENDA REQUEST FORM**

MEETING DATE: August 28, 2019

NAME & TITLE: Marisa Amaya, Event Development & Packaging Manager

DEPARTMENT: South Padre Island Convention and Visitors Bureau

ITEM

Discussion and possible action approve the funding request for the 2020 U.S. Lifeguard Association National event.

ITEM BACKGROUND

The 2020 U.S. Lifeguard Association (USLA) request consists of the operational, marketing and logistical requirements to host the actual event in 2020.

The Special Events Committee approved the funding request in the amount of \$65,000 at their regular meeting held Tuesday, August 21, 2019.

BUDGET/FINANCIAL SUMMARY

02-593-8099 Special Events Budget

COMPREHENSIVE PLAN GOAL

LEGAL REVIEW

Sent to Legal: YES: _____ NO: _____

Approved by Legal: YES: _____ NO: _____

Comments:

RECOMMENDATIONS/COMMENTS

Recommend to approve the funding request.

APPLICATION FOR INITIAL FUNDING

Today's Date: 08/02/2019

ORGANIZATON INFORMATION

Name of Organization: South Padre Island CVB

Address: 7355 Padre Blvd.

City, State, Zip: South Padre Island, TX 78597

Contact Name: Marisa Amaya Contact Email: marisa@sopadre.com

Contact Office Phone Number: 956-761-3000

Contact Cell Phone Number: _____

Website Address for Event or Sponsoring Entity: sopadre.com

Non-Profit or For-Profit status: Non-profit Tax ID #: _____

Entity's Creation Date: _____

Purpose of your organization:

EVENT INFORMATION

Name of Event: U.S. Lifeguard Association Nationals 2020

Date(s) of Event: August 4, 2020 - August 8, 2020

Primary Location of Event: Isla Grand Beach Resort

Amount Requested: \$65,000

Primary Purpose of Funded Activity/Facility:
Generate overnight stays, mid-week

How will the hotel tax funds be used: (please attach a list of the hotel tax funded expenditures?)

This will be used for operation costs. See attached budget

Percentage of Hotel Tax Support of Related Costs

100% Percentage of Total Event Costs Covered by Hotel Occupancy Tax

_____ Percentage of Total Annual Facility Costs Covered by Hotel Occupancy Tax for the Funded Event

_____ Percentage of Annual Staff Costs Covered by Hotel Occupancy Tax for the Funded Event

If staff costs are covered, estimate percentage of time staff spends annually on the funded event(s) compared to other activities _____ %

Are you asking for any cost reductions for city facility rentals or city services, and if so, please quantify and explain:

Yes - with permitting

Which Category or Categories Apply to Funding Request & Amount Requested Under Each Category:

- a) **Convention Center or Visitor Information Center:** construction, improvement, equipping, repairing, operation, and maintenance of convention center facilities or visitor information centers, or both. Amount requested under this category: \$ _____
- b) **Registration of Convention Delegates:** furnishing of facilities, personnel, and materials for the registration of convention delegates or registrants. Amount requested under this category: \$ _____
- c) **Advertising, Solicitations, Promotional programs to attract tourists and convention delegates** or registrants to the municipality or its vicinity. Amount requested under this category: \$ _____
- d) **Promotion of the Arts that Directly Enhance Tourism and the Hotel & Convention Industry:** the encouragement, promotion, improvement, and application of the arts that can be shown to have some direct impact on tourism and the hotel/convention industry. The impact may be that the art facility or event can show hotel nights that are booked due to their events or that guest at hotels attend the arts event. Eligible forms of art include instrumental and vocal music, dance, drama, folk art, creative writing, architecture, design and allied fields, painting, sculpture photography, graphic and craft arts, motion picture, radio, television, tape and sound recording, and other arts related to the presentation, performance, execution, and exhibition of these major art forms: \$ _____
- e) **Historical restoration and preservation projects or activities or advertising and conducting solicitation and promotional programs to encourage tourists and convention delegates to visit preserved historic sites or museums.** Amount requested under this category: \$ _____
- f) **Expenses including promotional expenses, directly related to a sporting event in which the majority of participants are tourists. The event must substantially increase economic activity at hotels within the city or its vicinity.** Amount requested under this category: \$ 65,000.00

How many attendees are expected to come to the sporting related event? 1,400

How many of the attendees are expected to be from more than 75 miles away? 95%

Quantify how the sporting related event will substantially increase economic activity at hotels within the city or its vicinity?

The multi-day event is typically held on the east coast or west coast. This year the event is held in central US, prompting for more attendance. Nearly all attendees must travel to compete, prompting over night stays.

- g) **Funding transportation systems for transporting tourists from hotels to and near the city to any of the following destinations: 1) the commercial center of the city; 2) a convention center in the city; 3) other hotels in or near the city; and 4) tourist attractions in or near the city. Please note that the ridership of any such transportation must be primarily tourists to qualify for hotel tax funding.** Amount requested under this category: \$ _____

What sites or attractions will tourists be taken to by this transportation?

Will members of the general public (non-tourists) be riding on this transportation?

What percentage of the ridership will be local citizens? _____

- h) **Signage directing tourists to sights and attractions that are visited frequently by hotel guests in the municipality. Amount requested under this category: \$** _____

What tourist attractions will be the subject of the signs?

QUESTIONS FOR ALL FUNDING REQUEST CATEGORIES

How many years have you held this Event? 0

Expected Attendance: 1,400

How many people attending the Event will use South Padre Island lodging establishments? 95%

How many nights do you anticipate the majority of the tourists will stay? 2-3

Will you reserve a room block for this Event at an area hotel(s)? Yes

Where and how many rooms will be blocked?

The SPI CVB has created room blocks at 3 hotels.

List other years (over the last three years) that you have hosted your Event or Project with amount of assistance given from HOT and the number of hotel rooms used:

Month/Year Held	Assistance Amount	Number of Hotel Rooms Used
N/A	N/A	N/A
_____	_____	_____
_____	_____	_____
_____	_____	_____

How will you measure the impact of your event on area hotel activity (e.g.; room block usage information, survey of hoteliers, etc.)?

Survey and room block information

Please list other organization, government entities, and grants that have offered financial support to your project: _____

Will the event charge admission? No If so, what is the cost per person? _____

Do you anticipate a net profit from the event? No

If there is a net profit, what is the anticipated amount and how will it be used?

No

All marketing and promotions will be coordinated through the CVA's agency, unless exempted from this requirement by the Executive Director, in which case all creative must be pre-approved by the Executive Director (or designee) and payments will be on a reimbursement basis. Please list all promotion efforts your organization is planning and the amount estimated for each media outlet:

- Newspaper: \$ _____
- Radio: \$ _____
- TV: \$ _____
- Website, Social Media: \$ _____
- Other Paid Advertising: \$ _____

Anticipated Number of Press Releases to Media: 2

Anticipated Number Direct Emails to out-of-town recipients: 2 - through the nonprofit

Other Promotions: Attended the 2019 USLA nationals in Virginia Beach, VA

A link to the CVB must be included on your promotional handouts and in your website for booking hotel nights during this event. Are you able to comply? Yes No

Will you negotiate a special rate or hotel/event package to attract overnight stays?

Yes

[If we have a tour operator, we will require them to use that service.]

What other marketing initiatives are you planning to promote hotel and convention activity for this event?

SoPadre website, Facebook, Instagram, Twitter and TAG

Who is your target audience? Lifeguard associations and families

What geographic region(s) are you marketing to?

All lifeguard associations across the nation

If the funding requested is related to a permanent facility (e.g. museum, visitor center):

- Expected Visitation by Tourists Monthly/Annually: _____
- Percentage of those who visit the facility who indicate they are staying at area hotels/lodging facilities: _____% (use a visitor log that asks them to check a box if they are staying at an area lodging facility)

What amount of event insurance do you have for your event and who is the carrier:

\$1,000,000

[Insert South Padre Island Minimum Event Insurance Coverage Minimums and duty to list South Padre Island as an additionally insured]

Any marketing for the event must be consistent with the brand image for South Padre Island and all such marketing pieces that are funded with hotel tax must be coordinated and developed by the South Padre Island CVB marketing agency. Are you able to comply?

Yes No

Where appropriate, the CVB will require access to event participant database information that will show zip code data to measure likely impact from the funded event.

Submit to complete applications to:

Marisa Amaya
Event Development Manager
C/O City of South Padre Island Convention and Visitors Bureau
7355 Padre Blvd.
South Padre Island, TX 78597
Phone: (956) 761-3834
Email: marisa@sopadre.com

USLA

Locations	Contact Person/ Phone #	Contact Email
Isla Grand Beach Resort - Host	Sylvia Soliz	
Pearl - Overflow		
Schlitterbahn Beach Resort	Mike Bigelow	mbigelow@schlitterbahn.com
Vendor	Main Contact Person/ Phone #	Vendor Email
Coastal Event Rentals	Jaime Barbosa - 956.343.7884	jaime@coastaleventrentalsrgv.com
Rental World	Angie Wolfe - 956.501.6278	awolfe@rentalworld.com

In-Kind	Notes/Descriptions	In-Kind Costs	Expenditures
Stickers, Coupon, Bags		In-Kind	\$0.00
Towels		In-Kind	\$0.00
Promotional items		In-Kind	\$0.00
Coupons and Officials dinner		In-Kind	\$0.00
Sunscreen Samples		In-Kind	\$0.00
Officials Lunch		In-Kind	\$0.00
Permitting		In-Kind	\$0.00
Banners		In-Kind	\$0.00
Signage		In-Kind	\$0.00
Registration Rooms		In-Kind	\$0.00

Vendor/ Other Expenses	Description	Budget:	\$65,000.00
Company Name	Awards	\$	375.00
	TV's	\$	1,500.00
	Competitor Writbands	\$	675.00
	Course Flags	\$	1,100.00
	Port-a-potties	\$	600.00
	Stopwatches for officials	\$	60.00
	3000 Lanyards for Badges	\$	475.00
	Whistles for Officials	\$	160.00
	1,500 Event Programs	\$	3,600.00
	Course Set Up	\$	1,000.00
	Tent Rental	\$	20,000.00
	Bleachers	\$	6,000.00
	Miscellaneous Tools for equipment	\$	450.00
	Staff Shirts	\$	750.00
	Scoring Forms	\$	150.00
	Inflatable Buoys	\$	400.00
	Cable/Wifi	\$	500.00
	Podium for awards	\$	100.00
	Videography and generator	\$	1,600.00
	Overnight Security	\$	1,300.00
	Photography	\$	1,000.00
	Various Sponsor Shipments	\$	100.00
	Gatorade, Plastic Bins	\$	120.00
	Miscellaneous - 1 TV, snacks	\$	1,000.00
	Produce - Lifeguards	\$	400.00
	Junior Day Lunch	\$	1,100.00
	Hotel room nights for officials	\$	15,000.00
	Officials Lunch	\$	1,100.00
	Committee and Officials Break Rooms	\$	4,800.00
	Estimated Budget	\$	65,415.00
		Remaining	\$65,000.00

**CITY OF SOUTH PADRE ISLAND
ADVISORY BOARD MEETING
AGENDA REQUEST FORM**

MEETING DATE: August 28, 2019

NAME & TITLE: Marisa Amaya, Event Development & Packaging Manager

DEPARTMENT: South Padre Island Convention and Visitors Bureau

ITEM

Discussion and possible action to approve the funding request for the 2020 Open Water Invitational event.

ITEM BACKGROUND

The 2020 Open Water Invitational event will be a new event coming to South Padre Island next fiscal year.

The Special Events Committee approved the funding request in the amount of \$5,000 for marketing and \$5,000 for in-kind services at their regular meeting held Tuesday, August 21, 2019.

BUDGET/FINANCIAL SUMMARY

02-593-8099 Special Events Budget

COMPREHENSIVE PLAN GOAL

LEGAL REVIEW

Sent to Legal: YES: _____ NO: _____

Approved by Legal: YES: _____ NO: _____

Comments:

RECOMMENDATIONS/COMMENTS

Recommend to approve the funding request for total amount of \$10,000.

APPLICATION FOR INITIAL FUNDING

Today's Date: July 9, 2019

ORGANIZATION INFORMATION

Name of Organization: McAllen Swim Club

Address: 5111 N. 10th Street, Suite # 131

City, State, Zip: McAllen, TX 78504

Contact Name: Hector Becerra Contact Office Phone Number: 956-529-5523

Contact Cell Phone Number: (310) 985-1125

Web Site Address for Event or Sponsoring Entity www.swimmisc.org

Non-Profit or For-Profit status: Non Profit Tax ID #: 17419565381

Entity's Creation Date: 1963

Purpose of your organization:

MSC is a non-profit organization & swim club based out of McAllen TX that is
dedicated to the continued development of the sport in our area. Established in 1963, MSC has been
home to more than 6,000 participants and continues to produce many of the area's top swimming performers,
many of which compete at multiple levels each year including local district, regional, state, national & collegiate levels.

EVENT INFORMATION

Name of Events or Project: MSC Open Water Invitational

Date of Event or Project: _____

*****Proposed Dates #1: August 7-9, 2020*****

August 7, 2020 - (Athlete Check-in, Vendor/booth fair, Swim Clinic, Safety & Official's meetings)

August 8, 2020 - (Race Day, Awards Ceremony & Event Social)

August 9, 2020 - (weather delay makeup day)

*****Proposed Dates #2 August 14-16*****

****Actual event dates to be determined during CVB board review****



Primary Location of Event or Project: Pier 19, 1 Padre Blvd, SPI, TX 78597

Amount Requested: \$ 20,000

Primary Purpose of Funded Activity/Facility:

To bring to SPI the first open water competition sanctioned by USA Swimming and/or US Masters swimming.

This event will help promote open water swimming to both adults and kids of beginner to advanced competitors.

Our goal is to make this an annual event that will draw people from across Texas, neighboring USA Swimming & US Masters LSC's (Local Swim Committees) as well as participants from parts of northern Mexico.

How will the hotel tax funds be used: (please attach a list of the hotel tax funded expenditures)
See attached PDF for information

Percentage of Hotel Tax Support of Related Costs

100 Percentage of **Total Event Costs** Covered by Hotel Occupancy Tax

 Percentage of **Total Annual Facility Costs** Covered by Hotel Occupancy Tax for the Funded Event

 Percentage of **Annual Staff Costs** Covered by Hotel Occupancy Tax for the Funded Event

If staff costs are covered, estimate percentage of time staff spends annually on the funded event(s) compared to other activities %

Are you asking for any cost reductions for city facility rentals or city services, and if so, please quantify and explain:

Yes,

1) we are requesting cost reduction / financial assistance for the use of rooms at the convention center for athlete check-in, late registration, Vendor/booth fair, Pre-Swim Clinic meeting, Safety team & Official's meetings

2) Amount requested TBD



Which Category or Categories Apply to Funding Request & Amount Requested Under Each Category:

- a) **Convention Center or Visitor Information Center:** construction, improvement, equipping, repairing, operation, and maintenance of convention center facilities or visitor information centers, or both. Amount requested under this category: \$ _____
- b) **Registration of Convention Delegates:** furnishing of facilities, personnel, and materials for the registration of convention delegates or registrants. Amount requested under this category: \$ _____
- c) **Advertising, Solicitations, Promotional programs to attract tourists and convention delegates** or registrants to the municipality or its vicinity. Amount requested under this category: \$ _____
- d) **Promotion of the Arts that Directly Enhance Tourism and the Hotel & Convention Industry:** the encouragement, promotion, improvement, and application of the arts that can be shown to have some direct impact on tourism and the hotel/convention industry. The impact may be that the art facility or event can show hotel nights that are booked due to their events or that guest at hotels attend the arts event. Eligible forms of art include instrumental and vocal music, dance, drama, folk art, creative writing, architecture, design and allied fields, painting, sculpture photography, graphic and craft arts, motion picture, radio, television, tape and sound recording, and other arts related to the presentation, performance, execution, and exhibition of these major art forms: \$ _____
- e) **Historical restoration and preservation projects or activities or advertising and conducting solicitation and promotional programs to encourage tourists and convention delegates to visit preserved historic sites or museums.** Amount requested under this category: \$ _____
- f) **Expenses including promotional expenses, directly related to a sporting event in which the majority of participants are tourists. The event must substantially increase economic activity at hotels within the city or its vicinity.**
Amount requested under this category: \$ 20,000

How many attendees are expected to come to the sporting related event? Est. 60-100 (yr 1) - 250-300 (yr 5)

How many of the attendees at the sporting related event are expected to be from another city or county? Est. 70% - 80%

Quantify how the sporting related event will substantially increase economic activity at hotels within the city or its vicinity?

We plan to work with the following hotels to secure special event rates: Schlitterbahn, KOA, Holiday Inn Express, Ramada,

Hilton Garden Inn & La Quinta to accommodate our out of town competitors. By having check-in on a Friday, race day on Saturday & weather

delay makeup day, we are looking to have people book 1-2 night stays in preparation for the swim.



- g) **Funding transportation systems for transporting tourists from hotels to and near the city to any of the following destinations: 1) the commercial center of the city; 2) a convention center in the city; 3) other hotels in or near the city; and 4) tourist attractions in or near the city. Please note that the ridership of any such transportation must be primarily tourists to qualify for hotel tax funding.**

Amount requested under this category: \$ _____

What sites or attractions will tourists be taken to by this transportation?

Will members of the general public (non-tourists) be riding on this transportation? _____

What percentage of the ridership will be local citizens? _____

- h) **Signage directing tourists to sights and attractions that are visited frequently by hotel guests in the municipality.**

Amount requested under this category: \$ \$500-\$750 _____

What tourist attractions will be the subject of the signs?

Attractions will be dependent on who the CVB board wishes for us to highlight as well as any local business partners who wish to sponsor our event



QUESTIONS FOR ALL FUNDING REQUEST CATEGORIES

How many years have you held this Event or Project:

This would be the first MSC hosted open water swim. As an organization, we have two years of event experience.
In 2016 & 2017 we worked along with Open Water Planet by providing volunteers, participants, promoting event through local & regional media, & donating awards for top finishers. Our goal is to host the first & only USAS and USMS sanctioned open water event in the RGV.

Expected Attendance: Est: 60-100 (yr 1), 100-150 (yr 2), 150-200 (yr 3), 200-250 (yr. 4), & 250-300 (yr 5)

How many people attending the Event or Project will use South Padre Island lodging establishments? 70%-80%

How many nights do you anticipate the majority of the tourists will stay: 1-3 nights

Do you reserve a room block for this event at an area hotel and if so, for how many rooms and at which hotels:

Please see attached file

HOTEL / LODGING OPTIONS

List other years (over the last three years) that you have hosted your Event or Project with amount of assistance given from HOT and the number of hotel rooms used:

Month/Year Held	Assistance Amount	Number of Hotel Rooms Used

How will you measure the impact of your event on area hotel activity (e.g.; room block usage information, survey of hoteliers, etc.)?

As advised and directed by the CVB board



Please list other organization, government entities, and grants that have offered financial support to your project:

US Masters - \$500 - \$1000 in support of US Masters for sanctioned event
TYR - \$800 in credit to purchase TYR branded prizes for top winners

Will the event charge admission? Yes

Do you anticipate a net profit from the event? Yes

If there is a net profit, what is the anticipated amount and how will it be used?

****Please see attached file****

PROJECTED GROWTH & REVENUE

All marketing and promotions will be coordinated through the CVA's agency, unless exempted from this requirement by the Executive Director, in which case all creative must be pre-approved by the Executive Director (or designee) and payments will be on a reimbursement basis. Please list all promotion efforts your organization is planning and the amount estimated for each media outlet:

- Newspaper: \$ 250 (est) - To promote the event & showcase results
- Radio: \$ 250 (est) - TBD
- TV: \$ 500 (est) - TBD
- Website, Social Media: \$ 1500 (est) - Facebook, Geo-tagging (Spectrum), Online registrations
- Other Paid Advertising: \$ 500 (est) - Direct marketing to USAS & USMS members

Anticipated Number of Press Releases to Media: 2 (1 in English & 1 in Spanish)

Anticipated Number Direct Mailings to out-of-town recipients: TBD

Other Promotions:

Our main target audience will be USA Swimming & US Masters teams across the state. We'll promote at major meets, on LSC (Local Swim Committee) event calendars, Geo-tagging (Facebook & Spectrum), & local paid advertising spaces. We will also be setting up an event website to highlight sponsors & event info



A link to the CVB must be included on your promotional handouts and in your website for booking hotel nights during this event. Are you able to comply? Yes No

Will you negotiate a special rate or hotel/event package to attract overnight stays?

Yes

[If we have a tour operator, we will require them to use that service.]

What other marketing initiatives are you planning to promote hotel and convention activity for this event?

Direct links to hotel partners through our team site, event registration page & meet information packet

What geographic areas does your event reach?

USAS LSCS - West Texas, South Texas, North Texas & Gulf

USMC LSCS - West Texas, South Texas, North Texas, & Gulf

Direct team invitations to teams in Louisiana & Florida

Federacion Mexicana de Natacion - Northern Regions of Mexico (in 2021)

If the funding requested is related to a permanent facility (e.g. museum, visitor center):

- Expected Visitation by Tourists Monthly/Annually: _____
- Percentage of those who visit the facility who indicate they are staying at area hotels/lodging facilities: _____% (use a visitor log that asks them to check a box if they are staying at an area lodging facility)

What amount of event insurance do you have for your event and who is the carrier:

Our event is covered under USA Swimming as well as US Masters Swimming. All of our participants are required to be active organization members in order to participate. One Time Event forms will be available for anyone not currently registered under USMS or USAS for liability & insurance coverage. All sanctioned USAS & USMS events are covered under their respective affiliation insurance policies.

[Insert South Padre Island Minimum Event Insurance Coverage Minimums and duty to list South Padre Island as an added insured]

Any marketing for the event must be consistent with the brand image for South Padre Island and all such marketing pieces that are funded with hotel tax must be coordinated and developed by the South Padre Island CVB marketing agency. Are you able to comply?

Yes No



Where appropriate, the CVB will require access to event participant database information that will show zip code data to measure likely impact from the funded event.

SUPPLEMENTAL INFORMATION REQUIRED WITH APPLICATION:

Along with the application, please submit the following:

- Proposed Marketing Plan for Funded Event
- Schedule of Activities or Events Relating to the Funded Project
- Complete budget for the Funded Project
- Room night projections, with back-up, for the Funded Event

Submit to complete applications to:

Marisa Amaya
Event Development & Packaging Manager
Convention and Visitors Advisory Board
C/O City of South Padre Island Convention and Visitors Bureau
7355 Padre Blvd.
South Padre Island, TX 78597

Phone: (956) 761-3834
Email: marisa@sopadre.com





2020 Open Water Invitational PROJECTED GROWTH & REVENUE CHART

*Subject to change

ANTICIPATED PARTICIPANT GROWTH						
Year	Min. # of Participants	Max # of Participants	Entry Fee	Est. Min Revenue	Est. Max Revenue	AMOUNT REQUESTED
2020	60	100	\$65.00	\$3,900.00	\$6,500.00	20000
2021	100	150	\$65.00	\$6,500.00	\$9,750.00	15000
2022	150	200	\$65.00	\$9,750.00	\$13,000.00	10000
2023	200	250	\$65.00	\$13,000.00	\$16,250.00	7500
2024	250	300	\$65.00	\$16,250.00	\$19,500.00	5,000
ANTICIPATED BOOTH / VENDOR PARTICIPATION & REVENUE						
Year	Min. # of Vendors	Max # of Vendors	Booth Fee	Est. Min Revenue	Est. Max Revenue	
2020	10	20	\$150.00	\$1,500.00	\$3,000.00	
2021	20	30	\$150.00	\$3,000.00	\$4,500.00	
2022	30	40	\$150.00	\$4,500.00	\$6,000.00	
2023	40	50	\$150.00	\$6,000.00	\$7,500.00	
2024	50	60	\$150.00	\$7,500.00	\$9,000.00	



2020 MSC OPEN WATER INVITATIONAL

Youth and Adult, 800m, 1-mile & 2-mile open water races

August 7-8, 2020 : South Padre Island, TX

Weather Makeup Date: Sunday August 9, 2020

SANCTION

USAS: Sanction # (pending) US Masters Swimming: Sanction # (pending)

Held under sanction of USAS and USMS: USA Swimming, USMS, South Texas LSC, South Texas LMSC, McAllen Swim Club (MSC), Meet Director, Officials, Race organizers, Committee members, Volunteers, Pier 19, & Schlitterbahn Water Park & Resorts shall be held free and harmless from all liabilities or claims for damages arising because of injuries or death to anyone during the conduct of this event.

HOST TEAM

McAllen Swim Club: 5111 N. 10th Street Suite #131, McAllen TX 78504

P: (956) 529-5523

W: www.swimmsc.org

E: contactmsc@yahoo.com

VENDOR FAIR/ ATHLETE CHECK-IN

South Padre Island Convention Center: 7355 Padre Blvd, South Padre Island, TX 78597

P: (956) 761-3000

W: www.sopadre.com

HOST HOTEL & OVERFLOW PARKING

Schlitterbahn Waterpark & Resort: 100 Padre Blvd. South Padre Island, TX 78597

P: (855) 923-7543

W: www.schlitterbahn.com

RACE SITE

Pier 19: 1 Padre Blvd, South Padre Island, TX 78597

P: (956) 761-7437

W: www.pier19.us

WEBSITE

www.swimmsc.org/mscowi (pending)

MEET

INFORMATION

Event Director Hector Becerra

contactmsc@yahoo.com

(956) 529-5523

Meet Director: TBD

Safety Director: Melissa Lara / (1 Other - TBD)

Meet Officials: Paulina Pena / Victor Garza

Admin Officials Lorena Singh / Alicia Lopez

COURSE

DESCRIPTION

- This is an open water, saltwater bayside swim. The weather and water conditions are unpredictable; please use good judgement if you are uncertain about swimming in open water.
- The course is set; however, the race committee reserves the right to change the configuration and/or direction of each event due to race day conditions. The details of race with landmarks are attached. Any questions about the course will be addressed at the Technical & Safety meetings.
- **Wetsuit rules: Wetsuits will NOT be allowed**

**RACE DAY
CONDITIONS**

- Average water temperature is expected to be in the range of 82-85 F
- Average surf is expected to be between 1-2ft seas
- Air temperature is expected to be in the range of 80-90 F
- Wind conditions average 10-15mph with South East winds

SAFETY

Course is patrolled by lifeguards & safety craft. Individual escorts are not allowed. All swimmers must wear the provided swim cap and follow all USAS & USMS rules. Mandatory safety meetings will be held on **Friday August 7 @ 4pm at the SPI Convention Center. See attached itinirary for complete info.** The Event Safety Plan will be available on race day as well as online at: www.swimmsc.org/mscowi

ELIGIBILITY

****ACTIVE USAS or USMS MEMBERSHIP REQUIRED****

- Open to all USAS & USMS member athletes registered prior to first day of the meet. Must be registered USA Swimming or US Masters athlete to enter.
- Age on June 30, 2019 will determine age for the meet.
- All swimmers who do not complete the course during the allotted time will be escorted off the course by safety personnel to prepare for the next race

Entry Requirements

Should have participated in one or more sanctioned open water swims, duathlons (swim/run), triathlons, lake or pool swims.

- 2 mile** · Swimmers will have 1.5hr to finish the swim
- 1 mile** · Swimmers will have 1 hr to finish the swim
- 800m** · Swimmers will have 40 minutes to finish the swim

**DISABILITY
SWIMMERS**

- Athletes with a disability are welcomed and shall provide advance notice of desired accommodations to the Event Director or Meet Director by no later than **Monday August 3 @ 11:59pm CST**
- The athlete (or the athlete's coach) is also responsible for notifying the Meet Referee of any disability prior to the competition.
- Please submit your accomodation requests along with your registration form.
- Requests can also be submitted via email at: contactmsc@yahoo.com

SUBJECT LINE: Open Water Disability Request

**ATHLETE SAFETY
MEETING**

****ATHLETE MANDATORY MEETING****

Location: SPI Convention Center

Time: 4:00pm

Date: Friday August 7, 2020

***CLINIC**

Clinician: TBD

Time: 6pm

Location: Convention Center - Classroom
Schlitterbahn - Beach Access

Date: Friday August 7, 2020

****CLINIC DETAILS SUBJECT TO CHANGE****

**EVENT
INFORMATION**

2 Mile Swim

- Consists of four (4) laps (see course map)
- Athletes will perform an "in water" start.
- The course is mapped for a clockwise swim on the outside of the turn buoys (buoys to the right of swimmers) .
- The athletes will swim into a a finish lane, cross a finish line, and exit the water through a loading dock.
- Participants not completing the 3.5K within the allotted (1hr 40min) time frame will need to be escorted off the course by safety personnel to allow for start of the next event

EVENT INFORMATION
(cont.)

- Consists of two (2) laps (see course map)
- Athletes will perform an "in water" start.
- The course is mapped for a clockwise swim on the outside of the turn buoys (buoys to the right of swimmers) .
- 1 Mile Swim · The athletes will swim into a a finish lane, cross a finish line, and exit the water through a loading dock.
- Participants not completing the 1M within the allotted (1hr) time frame will need to be escorted off the course by safety personnel to allow for start of the next event
- Consists of one (1) lap (see course map)
- Athletes will perform an "in water" start.
- The course is mapped for a clockwise swim on the outside of the turn buoys (buoys to the right of swimmers) .
- 800m Swim · The athletes will swim into a a finish lane, cross a finish line, and exit the water through a loading dock.
- Participants not completing the 800m within the allotted (40min) time frame will need to be escorted off the course by safety personnel to allow for start of the next event

WARM-UP

- Session #1 · Warmup is from 7:30am-7:45am in the designated warmup area.
- Session #2 · Warmup is from 9:30am-9:45am in the designated warmup area.
- Session #3 · Warmup is from 11:00am-11:15am in the designated warmup area.

ENTRY FEES

USAS	Entry Fee: \$60 + \$1.25 STLSC Splash Fee	\$61.25
	<i>Late Entry Fee: \$70 + \$1.25 STLSC Splash Fee</i>	<i>\$71.25</i>
USMS	Entry Fee: \$60 + \$5.00 STLMSC Participant Fee	\$65.00
	<i>Late Entry Fee: \$70 + \$5.00 STLMSC Participant Fee</i>	<i>\$75.00</i>

Entry Fee includes: Event shirt, event cap, swim clinic admission & goodie bag)

RACE SCHEDULE

8:00a	8:05am	9:55am	10:00 AM	11:20 AM	11:25AM
USAS 2M	USMS 2M	USAS 1M	USMS 1M	USAS 800m	USMS 800m
<i>Cap Color:</i> <i>Yellow</i>	<i>Cap Color:</i> <i>White</i>	<i>Cap Color:</i> <i>Neon Red</i>	<i>Cap Color:</i> <i>Neon Blue</i>	<i>Cap Color:</i> <i>Neon Pink</i>	<i>Cap Color:</i> <i>Neon Green</i>

ENTRY PROCEDURE

- Make entry fee check or money order payable to: **McAllen Swim Club**
- Send payment to: **5111 N. 10th Street Suite #131, McAllen TX 78504**
- Registration forms are available through **www.swimmsc.org**
- You will receive an e-mail reply that your entries have been received.
- Available t-shirt sizes: Youth(Y): S M L Adult(A): M L XL XXL

SINGLE EVENT REGISTRATION

- **NO ON-SITE OR SAME DAY MEMBERSHIP REGISTRATION WILL BE PERMITTED****
- "One Day" USAS/STLSC Open Water Athlete Application and "One Event" STLMSC/USMS Membership registrations are available for this event, but MUST be completed prior to event day.
- See attached "One-Day" & "Single Event" forms for submission information

ENTRY DEADLINE

- Early Bird - entries must be received by **Friday July 10, 2020 @ 11:59pm CST**
- All payments and entries must be received by **Friday July 24 @ 11:59pm CST**
- Late entries will ONLY be accepted **Friday August 7 until 5pm CST** at event check-in table

**WEATHER
CONDITIONS
&
CANCELLATION
POLICY**

- In the event of hazardous weather conditions, every attempt will be made to run the event on **Sunday August 9, 2020**. All scheduled races will remain the same unless necessary changes are required upon evaluation of weather conditions.
- Hazardous conditions such as excessive wind speeds, unexpected cold front, strong currents, unusually high levels of bacteria, or any condition deemed as unsafe by the Event Director, Safety Director, Meet Director and Coast Guard will be cause for cancellation of the event.
- Key event & Safety personnel reserve the right to make the final decisions of canceling the event in light of hazardous weather conditions which could pose a threat to participant safety.
- Weather warnings & notices will be announced 3-5 days prior to race day and will be available on www.swimmsc.org

REFUNDS

- No refunds will be given, under any circumstances, for entries that are accepted.

OFFICIALS

- Volunteer Open Water Officials with certification card are welcome and encouraged to officiate. To sign-up please email Event Director @ contactmsc@yahoo.com

AWARDS

Top Female & Male USAS & USMS finishers will receive a medal & TYR prize package
all 2nd & 3rd place Female & Male USAS & USMS finishers will receive a medal

RULES

- Current USA Swimming rules will govern the Meet. Please see Part Seven of the USA Swimming Rules and Regulations for a complete list of Open Water Rules.
- Any swimmer not turning properly at the buoys will be asked to return to the buoy & perform the turn properly. Failure to do so will result in the swimmer being disqualified
- Any swimmer that is past the out of bounds marker or is in the designated NO SWIM ZONE will be asked to return to the course. Failure to do so will result in the swimmer being disqualified
- Any swimmer that is deemed in distress and must be rescued by safety personnel, will be escorted off the course and as a result will be disqualified from the remainder of the event
- 2M, 1M & 800m – Groups start in the water by USAS then USMS affiliation.
See race day schedule for more information
- All swims will be unescorted. Lifeguards, Personal Water Crafts & Coast Guard Vessel will be onsite to monitor participant safety.

**EMERGENCY
NUMBERS**

IND. SAFETY DIRECTOR:	Melissa Lara	(956) 730-2737
EVENT DIRECTOR:	Hector Becerra	(310) 985-1125
MEET DIRECTOR:	TBD	

MEDICAL INFO

- MSC OW headquarters location: *KOA, 1 Padre Blvd, South Padre Island, TX 78597*
- EMS staging point: *Pier 19, 1 Padre Blvd, South Padre Island, TX 78597*
- If transport is deemed necessary by EMS, the athlete will be taken to Harlingen Medical Center 5501 US-77, Harlingen, TX 78550; unless the athlete requests otherwise.

SAFETY PROCEDURES

1. Swimmers MUST wear their race designated cap & athlete number during the race.
2. The course will be patrolled by Coast Guard, Water Rescue Personnel, Event Lifeguards, SPI EMTs & Ambulance will be standing by at Pier 19.
3. Finger and Toe nails should be neatly trimmed and not extend past the finger/toe, in order to prevent injury to others. Race Officials may require nail trimming in order to compete.
4. No shaving is permitted at the competition site.
5. No glass containers are permitted within the facility, course or event area(s).
6. Swimmers (Under 18) must be under the supervision of a parent or coach.
7. Use of audio or visual recording devices, including a cell phone, is not permitted in changing areas, rest rooms or locker rooms.
8. Any unsportsmanlike or physical conduct during the event will be grounds for disqualification

VIDEO RECORDING

PHOTOGRAPHY AND VIDEO RECORDING:

Meet Management has the full authority to restrict any and all photography and visual recording at the event. Photography or video recording (using cameras, video cameras, iPads, cell phones, etc) is prohibited in any "Non-Camera Zones" as designated by Meet Management. Any individual failing to abide by these rules may be ejected from the facility and be subject to a Code of Conduct violation at the discretion of Meet Management.

DRONES: Operation of a drone, or any other flying apparatus, is prohibited over the venue (pools, athlete/coach areas, spectator areas and open ceiling locker rooms) any time athletes, coaches, officials and/or spectators are present.

VOLUNTEERS

- MSC will provide volunteers for event needs
- Additional volunteers are welcome and encouraged to assist.
- Please contact the Event Director or MSC @ contactmsc@yahoo.com for volunteering opportunities

DIRECTIONS

From: Port Isabel

To: Schlitterbahn Waterpark & Resort

- 1) Head East onto TX-100 E/E Queen Isabella Blvd
- 2) Continue to follow TX-100 E
- 3) Turn right onto Padre Blvd/State Park Rd 100
- 4) Turn left onto Padre Blvd
- 5) Turn right onto McCarter Rd
- 6) Turn left
- 7) Destination will be on the right

From: Port Isabel

To: Pier 19

- 1) Head East onto TX-100 E/E Queen Isabella Blvd
- 2) Continue to follow TX-100 E
- 3) Turn right onto Padre Blvd/State Park Rd 100
- 4) Turn right, destination will be on your right

PARKING

Event parking will be held at Schlitterbahn Waterpark. Please follow Schlitterbahn staff instructions when arriving. NO EVENT PARKING will be allowed inside the KOA or Pier 19 parking lot.

***** Group Code: MSC2020 *****

HOST HOTEL

Schlitterbahn Waterparks & Resorts

33261 State Park Road 100

South Padre Island, Texas 78597

Phone: (956) 772-7873

<https://www.schlitterbahn.com/south-padre-island>

**Call to reserve
your room
(956) 772-7873**

KOA - South Padre Island

1 Padre Blvd, South Padre Island, TX 78597

Phone: (956) 761-5665

www.koa.com

**Call to reserve
your room
(956) 761-5665**

LODGING

Additional hotel options

La Quinta

7000 Padre Blvd, South Padre Island, TX 78597

Phone: (956) 772-7000

www.lq.com

Ramada Hotel Resort & Suites

6200 Padre Blvd., South Padre Island, TX.78597

Phone: (956) 299-2481

<https://www.ramadaspi.com>

**Call to reserve your
room and receive
discount**

Holiday Inn Express

6502 Padre Blvd, South Padre Island, TX 78597

Phone: (956) 761-8844

www.ihg.com

MSC

2020 MSC Open Water Invitational
August 8, 2020

Course Layout



PIER 19



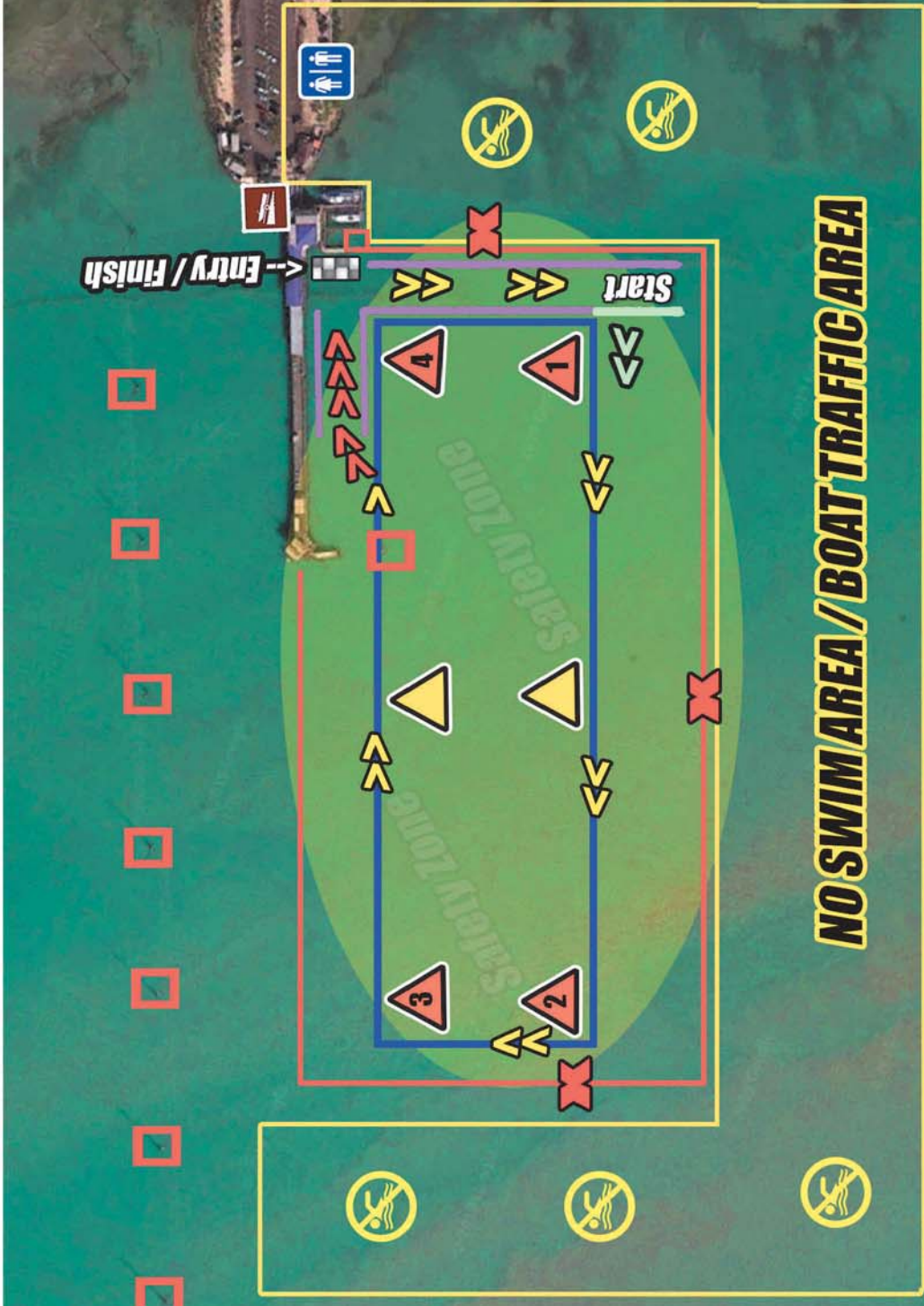
Race Distances
2M = 4 Laps
1M = 2 Laps
800m = 1 Lap

Course Markers

- Course: Blue line
- Out of Bounds: Red line with X
- No Swim Area: Yellow line
- Lane Ropes: Purple line
- Entry / Finish: Dotted line
- Ocean Pillar: Red square

Race Direction

- Race Start: Three yellow chevrons pointing right
- Race Finish: Three red chevrons pointing right
- General Dir.: Three yellow chevrons pointing right





2020 Open Water Invitational Emergency Action Plan August 7-9, 2020

MSC Event Director & Independent Safety Director have written an emergency plan that should be followed in the event of a medical emergency. All EMS personnel, lifeguards, law enforcement personnel and volunteers should be familiar with this document and their role and responsibility in an emergency. Any questions should be directed to the Safety Director (or Event Director, in the absence of a certified lifeguard.)

An emergency is the need for Emergency Medical Services (EMS) to give further medical attention and/or transport an athlete to the hospital. It is **IMPERATIVE** in these situations that coordination between lifeguards, law enforcement personnel and safety volunteers be effective. This guide is intended to delineate roles and outline protocol to be followed should an emergency occur. Situations that warrant EMS activation via 911 include but are not limited to the following:

(The situations listed below are the **MOST PROBABLE** emergent scenarios but is not all inclusive)

- An athlete has submerged
- An athlete has aspirated water
- An athlete has lost consciousness
- An athlete has severe bleeding that cannot be stopped
- An athlete is suspected of dehydration
- An athlete is suspected of hypothermia

Chain of Command

Safety Director/Meet Director

Lifeguard

Coast Guard / Law Enforcement personnel

Safety volunteers

The highest person in the chain of command present at the scene will be designated "leader". This person is responsible for deciding whether to activate EMS via 911, instructing others how to assist and will remain WITH the athlete until EMS arrives.

Once it has been decided to activate EMS, the following protocol should be followed:

1. The highest person on the chain of command will be deemed the "leader", and will stay with the athlete to monitor the athlete's condition and render necessary first aid. If possible, a second person within the chain of command should stay and assist. The Safety Director or Event Director should be notified that there is an emergency situation on the course
2. The highest person on the chain of command will make the EMS call or designate a person to call 911. EMS should be notified of the type of emergency, the condition of the athlete and directions to the exact location of the athlete. Also, EMS should be notified that the athlete will be transported via the emergency exit to EMS staging at Pier 19 parking lot
 - a. PWCs with sleds will be designated to retrieve the athlete and transport to designated Zone boat ramp for evaluation by the EMS unit staged at Pier 19
3. Phones and radios are located with the Event Director, land lifeguards, PWC dry boxes and Coast Guard water crafts.
4. Athletes will be retrieved by PWC from water rescue safety personnel and transported directly to shoreline for EMS evaluation.
5. If transport is deemed necessary by EMS, the athlete will be taken to Harlingen Medical Center 5501 US-77, Harlingen, TX 78550; unless the athlete requests otherwise.

OWS Headquarters location:

KOA Campgrounds 1 Padre Blvd, South Padre Island, TX 78597

EMS staging point:

Pier 19 parking lot: 1 Padre Blvd, South Padre Island, Texas 78597

Location of AEDs, Oxygen, and thermal blankets:

Zone #1: EMS unit staged at Pier 19

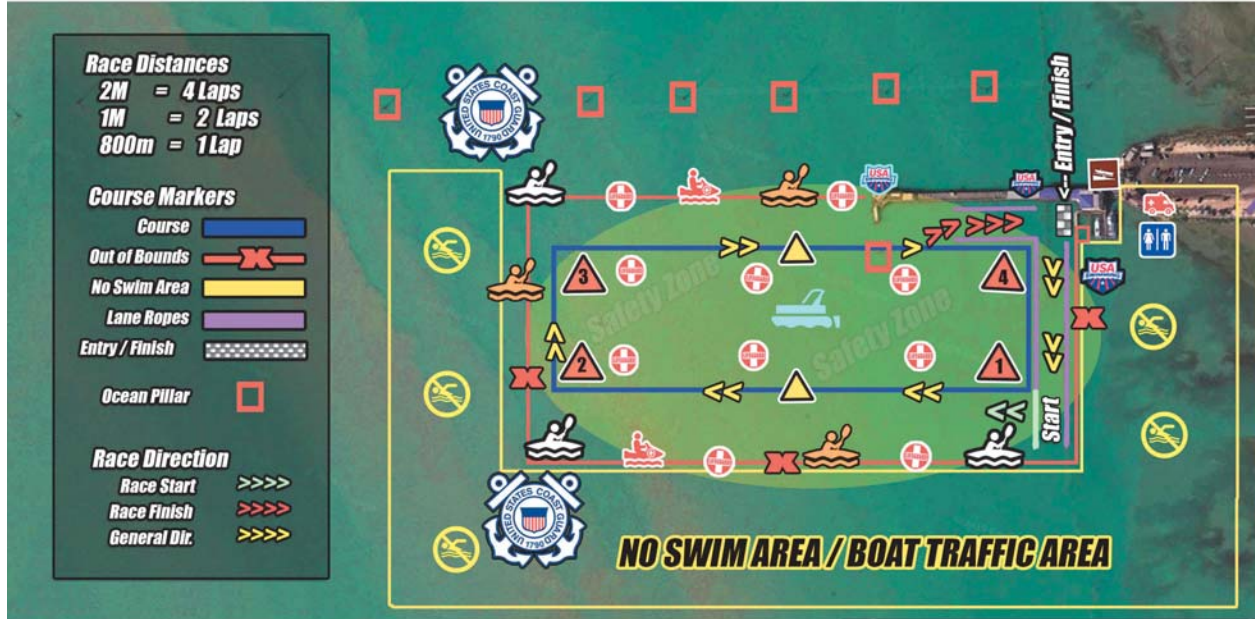


2020 MSC Open Water Invitational
August 8, 2020

Course Layout



PIER 19



MINIMUM SAFETY REQs - 11 lifeguards; 2 PWCs, 3 kayaks, 2 CG Vessels

Zone #1 – All course waters

Lifeguard rescue to PWC lifeguard sled for transport to boat ramp North of Pier 19 or South of Pier 19 (closest emergency exit available); to EMS staging point at Pier 19 parking lot

Primary AED EMS staged at Pier 19

Secondary AED Coast Guard Safety Vessel

IMPORTANT PHONE NUMBERS:

Safety Director – Melissa Lara: (956) 730-2737

Event Director – Hector D Becerra: (310) 985-1125



2020 Open Water Invitational
***Event Agenda**

**Subject to change*

Fri. Aug 7: Check-in, Tech/Safety Meeting, Clinic, & Vendor Fair

Location: SPI Convention Center

All Athlete:

Timeline

10:00am All Athlete Check-in Opens / Vendor Fair Opens
12:00pm Event Official's Meeting
1:00pm Technical Safety Meeting
4:00pm Athlete Safety Meeting (*Mandatory for all participants*)
5:00pm Athlete Check-in Close / Vendor Fair Closes
6:00pm Swim Clinic - *Subject to change*

Sat. Aug 8: Race Day & Awards Ceremony

Race Location: Pier 19

Late Check-in: Schlitterbahn

Awards: Schlitterbahn

2 Mile Swim:

Timeline

6:00am Late Check-in: Opens
7:30am Late Check-in: Closes
7:30am Warmup Opens @ Pier 19 Course / KOA
7:45am Warmup Closes
8:00am Wave 1: USAS (Yellow Caps)
8:05am Wave 2: USMS (White Caps)
9:30am 2 Mile Competition time expires

1M Swim:

Timeline

9:30am Warmup Opens @ Pier 19 Course / KOA
9:45am Warmup Closes
9:55am Wave 1: USAS (Red Caps)
10:00am Wave 2: USMS (Blue Caps)
11:00am 1 Mile Competition time expires

800m Swim:

Timeline

11:00am Warmup Opens @ Pier 19 Course / KOA
11:15am Warmup Closes
11:20am Wave 1: USAS (Pink Caps)
11:25pm Wave 2: USMS (Green Caps)

12:00pm —All Competition concludes—

1:00pm Award Ceremony – Schlitterbahn

MSC Open Water Invitational

April 7, 2019

South Padre Island, TX

EQUIPMENT & KEY PERSONNEL

Legend: (R) RENTAL (P) PURCHASED (B) BORROWED (D) DONATED

ID	COMPANY/CONTACT	ITEM(S)	\$\$	QTY	PHONE / EMAIL	DATE OUT	DATE IN
KP	Hector Becerra	EVENT DIRECTOR	\$2,500				
KP	Melissa Lara	SAFETY DIRECTOR	\$300				
KP		RACE DIRECTOR	\$300				
KP		REFEREE(S) @ \$140	\$420	1 to 3			

TOTAL \$3,520

(S) Safety Equipment

ID	COMPANY/CONTACT	ITEM(S)	\$\$	QTY	PHONE / EMAIL	DATE OUT	DATE IN
B	Jim Pig - Beach Patrol	Jet Ski	\$0	1			
B	Cameron County P&R	Jet Ski	\$0	1			
R	TBD	Jet Ski	\$300	1			
C	Gene (Need Last Name)	Lead Lifeguard	\$175	1			
C	City SPI & Cameron County	Lifeguards @ \$120/day	\$960	7			
B	Jim Pig - Beach Patrol	Rescue Tubes	\$0	7			
B	Jim Pig - Beach Patrol	First Aid Kit(s)	\$0	7			
B		Safety Boat 1 Coast Guard	\$0	1			
B		Safety Boat 2 CBP/Game Warden	\$0	1			
D	Jim Pig - Beach Patrol	AED, Oxygen Tank, Thermal Blanket	\$0	3	Land Safety Rescue		
R	City of SPI	Land Rescue 1 - Police Vehicle	\$250	3	Land Safety Rescue		
B	Cameron County P&R	Land Rescue 2 - City or County truck	\$0				

TOTAL \$1,685

Pre Race Meeting & Pre Race Clinic

ID	COMPANY/CONTACT	ITEM(S)	\$\$	QTY	PHONE / EMAIL	DATE OUT	DATE IN
D		Projector & Screen	\$0				
D	Schlitterbahn	Room Costs	\$0				
D		Podium & Mic	\$0				
D		Awards Room Area	\$0				

TOTAL \$0

Timing System / Awards

ID	COMPANY/CONTACT	ITEM(S)	\$\$	QTY	PHONE / EMAIL	DATE OUT	DATE IN
P	ASAP Printing	Winners Plaques (9x7 plaque/FC)	\$70	2	with photo slot for winners	1 - 2 Weeks	
P		TYR Awards	\$400				
P	ASAP Printing - ??	Feather Flags					
R	Comar Scaffolding - ??	Scaffolding for Finish Line			Need to support a 4x 14 ft sign (on Ware/83)		
R	Rent A World - ??	Finish Line Inflatable					

TOTAL \$470

Office Supplies Registration Materials Race Items

ID	COMPANY/CONTACT	ITEM(S)	\$\$	QTY	PHONE / EMAIL	DATE OUT	DATE IN
P	Office Depot	Clip Boards	\$35				
P	Office Depot	Pencils / Markers	\$10				
P	Office Depot	Body Markers	\$20				
P	MSC Home Print	ID Lanyards	\$30	100			
P	ASAP Printing Sol.	Wrist Bands w/ print @ \$0.40e +\$40 setup	\$195	400		7 - 10 days	
		Shirts - TBD					
P	ASAP Printing Sol.	Swag String Tote Bag @ \$2.36e +	\$650	250		10-15 days	
B	Hector Becerra	Printer	\$0				
P	Office Depot	Ink	\$100				
P	https://simplyswimcaps.com	Swim Cap I	\$650	500	Neon Green & Red w/ 500 Black Print		
	MSC / Event Director	Petty Cash	\$600				

TOTAL \$2,290

Course Needs

ID	COMPANY/CONTACT	ITEM(S)	\$\$	QTY	PHONE / EMAIL	DATE OUT	DATE IN
B	Dave Johnson	Race Bouys (Large)	\$0	5			
B		Bouy Inflation - Leaf Blower	\$0	1			
P	Home Depot	Cinder Blocks	\$10	5			
P	Home Depot	100 foot Rope @ \$15	\$80	5	100-ft-Assorted-Color-Diamond-Braid-		
R		GPS System	\$250				

P	Walmart @ \$13.50	Ozark Trail Desert Patrol 6-Gal Water Jug	\$70	5	https://www.walmart.com/ip/Ozark-Trail-Desert-Pa		
	(For Pier 19 Only)	Rope Ladders \$200	\$0	4			
	(For Pier 19 Only)	Carpet for dock \$200	\$0	1			
R		Walkies	\$600	10			
P	https://bigtimeclocks.biz	Race Clock	\$400	1	https://bigtimeclocks.biz/product/giant-8-led/		
P	https://bigtimeclocks.biz	Race Clock Stand	\$150	1			
		Starting Rope / Flags	\$15				

TOTAL \$1,575

Marketing

ID	COMPANY/CONTACT	ITEM(S)	\$\$	QTY	PHONE / EMAIL	DATE OUT	DATE IN
P	ASAP Printing	Welcome Signage - 12ft x 12 ft	\$150	1			
P	ASAP Printing	Parking Direction Signage - 4ft x 5ft	\$120	2			
P	ASAP Printing	Participant Direction Signage - 11x17in	\$80	10			
P	ASAP Printing	Finish Banner 3x20 OR 4x 12ft	\$300	1			
P	ASAP Printing	Award Backdrop Banner 8x8	\$750	2	@\$375 (Banner + Stand)	1 - 2 week delivery	
P	Tommy Balles	Video & Photo usage	\$150				
P	Rachel Francis	Landing Page Designer	\$300				
P	GoDaddy	Domain Hosting	\$200				

TOTAL \$2,050

Vehicles

ID	COMPANY/CONTACT	ITEM(S)	\$\$	QTY	PHONE / EMAIL	DATE OUT	DATE IN
R		Box Truck	\$250	1			
R		Golf Cart(s) to jetties (donated)	\$600	4			

TOTAL \$850

Lodging

ID	COMPANY/CONTACT	ITEM(S)	\$\$	QTY	PHONE / EMAIL	DATE OUT	DATE IN
R	Paulina & Ruben Pena	SPI Condo for Officials	\$300	4 Nights			

TOTAL \$300

Craft Services

ID	COMPANY/CONTACT	ITEM(S)	\$\$	QTY	PHONE / EMAIL	DATE OUT	DATE IN
	HEB	Bananas	28.3				
		Oranges	119.6				
		Water	180				
		Oat and Crunch Bar	19.8				
		Fruit/Nut Trail Mix Bar	32.7				
		Oatmeal Raisin Bar	32.7				
		Oat and Honey Bar	\$12				
		Banana Harvest Bar	\$12				
		Golden Almond Bar	\$12				
		Peanut Butter Chip Bar	\$12				

TOTAL \$461

Category Expenses

EQUIPMENT & KEY PERSONNEL	\$3,520	GRAND TOTAL	\$13,200.80
SAFETY EQUIPMENT	\$1,685		
PRE RACE SAETY MEETING	\$0		
Timing System / Awards	\$470		
Office Supplies/Registration Materials/Race Items	\$2,290		
COURSE MATERIALS	\$1,575		
MARKETING	\$2,050		
VEHICLE RENTAL	\$850		
LODGING	\$300		
CRAFT SERVICES / HOSPITALITY	\$461		

**CITY OF SOUTH PADRE ISLAND
ADVISORY BOARD MEETING
AGENDA REQUEST FORM**

MEETING DATE: August 28, 2019

NAME & TITLE: Marisa Amaya, Event Development & Packaging Manager

DEPARTMENT: South Padre Island Convention and Visitors Bureau

ITEM

Discussion and possible action approve the funding request for the 2019 Veteran’s Day event.

ITEM BACKGROUND

The 2019 Veteran’s Day event will take place at the SPICC.

The Special Events Committee approved the funding request in the amount of \$3,500 at their regular meeting held Tuesday, August 21, 2019.

BUDGET/FINANCIAL SUMMARY

02-593-8099 Special Events Budget

COMPREHENSIVE PLAN GOAL

LEGAL REVIEW

Sent to Legal: YES: _____ NO: _____

Approved by Legal: YES: _____ NO: _____

Comments:

RECOMMENDATIONS/COMMENTS

Recommend to approve the funding request.

APPLICATION FOR INITIAL FUNDING

Today's Date: 08/02/2019

ORGANIZATION INFORMATION

Name of Organization: South Padre Island CVB

Address: 7355 Padre Blvd.

City, State, Zip: South Padre Island, TX 78597

Contact Name: Michael Flores Contact Email: michael@sopadre.com

Contact Office Phone Number: 956-761-3000

Contact Cell Phone Number: _____

Website Address for Event or Sponsoring Entity: sopadre.com

Non-Profit or For-Profit status: Non-profit Tax ID #: _____

Entity's Creation Date: _____

Purpose of your organization:

EVENT INFORMATION

Name of Event: Veterans Day Celebration

Date(s) of Event: 11/09/2019

Primary Location of Event: SPI Convention Centre

Amount Requested: \$3,500

Primary Purpose of Funded Activity/Facility:

Provide family-friendly entertainment in support of the City's
Veterans Day program

How will the hotel tax funds be used: (please attach a list of the hotel tax funded expenditures?)

Guest speakers, food and beverages, musical entertainment

Percentage of Hotel Tax Support of Related Costs

100% Percentage of Total Event Costs Covered by Hotel Occupancy Tax

_____ Percentage of Total Annual Facility Costs Covered by Hotel Occupancy Tax for the Funded Event

_____ Percentage of Annual Staff Costs Covered by Hotel Occupancy Tax for the Funded Event

If staff costs are covered, estimate percentage of time staff spends annually on the funded event(s) compared to other activities _____ %

Are you asking for any cost reductions for city facility rentals or city services, and if so, please quantify and explain:

Which Category or Categories Apply to Funding Request & Amount Requested Under Each Category:

- a) **Convention Center or Visitor Information Center:** construction, improvement, equipping, repairing, operation, and maintenance of convention center facilities or visitor information centers, or both. Amount requested under this category: \$ _____
- b) **Registration of Convention Delegates:** furnishing of facilities, personnel, and materials for the registration of convention delegates or registrants. Amount requested under this category: \$ _____
- c) **Advertising, Solicitations, Promotional programs to attract tourists and convention delegates or registrants to the municipality or its vicinity.** Amount requested under this category: \$ _____
- d) **Promotion of the Arts that Directly Enhance Tourism and the Hotel & Convention Industry:** the encouragement, promotion, improvement, and application of the arts that can be shown to have some direct impact on tourism and the hotel/convention industry. The impact may be that the art facility or event can show hotel nights that are booked due to their events or that guest at hotels attend the arts event. Eligible forms of art include instrumental and vocal music, dance, drama, folk art, creative writing, architecture, design and allied fields, painting, sculpture photography, graphic and craft arts, motion picture, radio, television, tape and sound recording, and other arts related to the presentation, performance, execution, and exhibition of these major art forms: \$ 3,500.00
- e) **Historical restoration and preservation projects or activities or advertising and conducting solicitation and promotional programs to encourage tourists and convention delegates to visit preserved historic sites or museums.** Amount requested under this category: \$ _____
- f) **Expenses including promotional expenses, directly related to a sporting event in which the majority of participants are tourists. The event must substantially increase economic activity at hotels within the city or its vicinity.** Amount requested under this category: \$ _____

How many attendees are expected to come to the sporting related event? _____

How many of the attendees are expected to be from more than 75 miles away? _____

Quantify how the sporting related event will substantially increase economic activity at hotels within the city or its vicinity?

- g) **Funding transportation systems for transporting tourists from hotels to and near the city to any of the following destinations: 1) the commercial center of the city; 2) a convention center in the city; 3) other hotels in or near the city; and 4) tourist attractions in or near the city. Please note that the ridership of any such transportation must be primarily tourists to qualify for hotel tax funding.** Amount requested under this category: \$ _____

What sites or attractions will tourists be taken to by this transportation?

Will members of the general public (non-tourists) be riding on this transportation?

What percentage of the ridership will be local citizens? _____

- h) **Signage directing tourists to sights and attractions that are visited frequently by hotel guests in the municipality. Amount requested under this category: \$** _____

What tourist attractions will be the subject of the signs?

QUESTIONS FOR ALL FUNDING REQUEST CATEGORIES

How many years have you held this Event? 7

Expected Attendance: 300

How many people attending the Event will use South Padre Island lodging establishments? _____

How many nights do you anticipate the majority of the tourists will stay? _____

Will you reserve a room block for this Event at an area hotel(s)? Yes

Where and how many rooms will be blocked?

The SPI CVB will package this event with local hotels and VRMs.

List other years (over the last three years) that you have hosted your Event or Project with amount of assistance given from HOT and the number of hotel rooms used:

Month/Year Held	Assistance Amount	Number of Hotel Rooms Used
2018	\$20,000	431
_____	_____	_____
_____	_____	_____

How will you measure the impact of your event on area hotel activity (e.g.; room block usage information, survey of hoteliers, etc.)?

Survey and room block information

N/A

Please list other organization, government entities, and grants that have offered financial support to your project: N/A

Will the event charge admission? No If so, what is the cost per person? _____

Do you anticipate a net profit from the event? No

If there is a net profit, what is the anticipated amount and how will it be used?

N/A

All marketing and promotions will be coordinated through the CVA's agency, unless exempted from this requirement by the Executive Director, in which case all creative must be pre-approved by the Executive Director (or designee) and payments will be on a reimbursement basis. Please list all promotion efforts your organization is planning and the amount estimated for each media outlet:

- Newspaper: \$ _____
- Radio: \$ _____
- TV: \$ _____
- Website, Social Media: \$ 50.00
- Other Paid Advertising: \$ _____

Anticipated Number of Press Releases to Media: 1

Anticipated Number Direct Emails to out-of-town recipients: _____

Other Promotions: _____

A link to the CVB must be included on your promotional handouts and in your website for booking hotel nights during this event. Are you able to comply? Yes No

Will you negotiate a special rate or hotel/event package to attract overnight stays?

Yes

[If we have a tour operator, we will require them to use that service.]

What other marketing initiatives are you planning to promote hotel and convention activity for this event?

SoPadre website, Facebook, Instagram, Twitter and TAG

Who is your target audience? Veterans and families

What geographic region(s) are you marketing to?

RGV

If the funding requested is related to a permanent facility (e.g. museum, visitor center):

- Expected Visitation by Tourists Monthly/Annually: _____
- Percentage of those who visit the facility who indicate they are staying at area hotels/lodging facilities: _____% (use a visitor log that asks them to check a box if they are staying at an area lodging facility)

What amount of event insurance do you have for your event and who is the carrier:

\$1,000,000

[Insert South Padre Island Minimum Event Insurance Coverage Minimums and duty to list South Padre Island as an additionally insured]

Any marketing for the event must be consistent with the brand image for South Padre Island and all such marketing pieces that are funded with hotel tax must be coordinated and developed by the South Padre Island CVB marketing agency. Are you able to comply?

Yes No

Where appropriate, the CVB will require access to event participant database information that will show zip code data to measure likely impact from the funded event.

Submit to complete applications to:

Marisa Amaya
Event Development Manager
C/O City of South Padre Island Convention and Visitors Bureau
7355 Padre Blvd.
South Padre Island, TX 78597
Phone: (956) 761-3834
Email: marisa@sopadre.com



Veterans Day Program-2019

2019 | 9 November

Music/Entertainment	Details	Budget	
Pelican West	Pelican West will begin playing at 2 p.m.	\$800.00	
Lobo Del Mar Bag Pipes	Played after the Veterans recognition at 3 p.m.	\$500.00	
Guest Speak		\$500.00	
		\$1,800.00	
Food and Drinks	Quantity	Details	Budget
Sweet n Spicy Meatballs			
BBQ Sliders			
Wrap pinwheels			
Jalapeno Cheese Dip served with gourmet crackers			
Chips with Mango Salsa			
Tea, lemonade and water	200	Includes plates, forks and napkins	\$500.00
Purple heart cake	200	donated cake	\$0.00
			\$500.00
Other Supplies	Details	Budget	
Commemorative Coin	200 pieces	\$1,000.00	
Program books	200 pieces (1 page, folded, glossy, front/back)	\$200.00	
		\$1,200.00	
TOTAL		\$3,500.00	

**CITY OF SOUTH PADRE ISLAND
ADVISORY BOARD MEETING
AGENDA REQUEST FORM**

MEETING DATE: August 28, 2019

NAME & TITLE: Marisa Amaya, Event Development & Packaging Manager

DEPARTMENT: South Padre Island Convention and Visitors Bureau

ITEM

Discussion and possible action approve the funding request for the 2019 SPI Pride event.

ITEM BACKGROUND

The 2019 SPI Pride event is an inaugural LGBTQIA-based event.

The Special Events Committee approved the funding request in the amount of \$5,000 at their regular meeting held Tuesday, August 21, 2019.

BUDGET/FINANCIAL SUMMARY

02-593-8099 Special Events Budget

COMPREHENSIVE PLAN GOAL

LEGAL REVIEW

Sent to Legal: YES: _____ NO: _____

Approved by Legal: YES: _____ NO: _____

Comments:

RECOMMENDATIONS/COMMENTS

Recommend to approve the funding request.

APPLICATION FOR INITIAL FUNDING

Today's Date: 07/11/19

ORGANIZATION INFORMATION

Name of Organization: SPI Pride

Address: 120 E. Atol St.

City, State, Zip: South Padre Island, Texas 78597

Contact Name: Jay Carlson Contact Email: jaycar0499@gmail.com

Contact Office Phone Number: 956.592.8619

Contact Cell Phone Number: 956.592.8619

Web Site Address for Event or Sponsoring Entity: spipride.com

Non-Profit or For-Profit status: Profit Tax ID #: _____

Entity's Creation Date: 7/11/2019

Purpose of your organization:

A five day Gay Pride festival for the LGBT community and friends.

EVENT INFORMATION

Name of Event: SPI Pride

Date(s) of Event: October 9-13, 2019

Primary Location of Event: Upper Deck Hotel, Clayton's, Tequila Sunset, Margarita's on the Beach

Amount Requested: \$5,000.00

Primary Purpose of Funded Activity/Facility:

Advertising, Banners, Brochures, Rainbow Flags, decorations, Parade expenses, flyers



How many attendees are expected to come to the sporting related event? _____

How many of the attendees at the sporting event are expected to be from another city/county? _____

Quantify how the sporting related event will substantially increase economic activity at hotels within the city or its vicinity?

Funding transportation systems for transporting tourists from hotels to and near the city to any of the following destinations: 1) the commercial center of the city; 2) a convention center in the city; 3) other hotels in or near the city; and 4) tourist attractions in or near the city. Please note that the ridership of any such transportation must be primarily tourists to qualify for hotel tax funding. Amount requested under this category: \$ _____

What sites or attractions will tourists be taken to by this transportation?

Will members of the general public (non-tourists) be riding on this transportation? _____

What percentage of the ridership will be local citizens? _____

Signage directing tourists to sights and attractions that are visited frequently by hotel guests in the municipality. Amount requested under this category: \$ _____

What tourist attractions will be the subject of the signs?

QUESTIONS FOR ALL FUNDING REQUEST CATEGORIES

How many years have you held this Event: 0

Expected Attendance: 500 to 1,500

How many people attending the Event will use South Padre Island lodging establishments? 500 to 1,000

How many nights do you anticipate the majority of the tourists will stay: 500 to 600

Do you reserve a room block for this event at an area hotel and if so, for how many rooms and at which hotels:

Yes, Upper Deck Hotel



List other years (over the last three years) that you have hosted your Event or Project with amount of assistance given from HOT and the number of hotel rooms used:

Month/Year Held	Assistance Amount	Number of Hotel Rooms Used
_____	_____	_____
_____	_____	_____
_____	_____	_____

How will you measure the impact of your event on area hotel activity (e.g.; room block usage information, survey of hoteliers, etc.)?

Whatever has worked well for previous events. I don't think there is an easy way to determine this.

Please list other organization, government entities, and grants that have offered financial support to your project: None as of 7/31/2019

Will the event charge admission? Yes

Do you anticipate a net profit from the event? Yes

If there is a net profit, what is the anticipated amount and how will it be used?

Profit unknown. If there is a profit, it will go to the event owners Jay Carlsen and Paul Magee.

All marketing and promotions will be coordinated through the CVA's agency, unless exempted from this requirement by the Executive Director, in which case all creative must be pre-approved by the Executive Director (or designee) and payments will be on a reimbursement basis. Please list all promotion efforts your organization is planning and the amount estimated for each media outlet:

- Newspaper: \$ _____
- Radio: \$ _____
- TV: \$ _____
- Website, Social Media: \$ 3,000
- Other Paid Advertising: \$ 4,000

Anticipated Number of Press Releases to Media: 5 to 10

Anticipated Number Direct Mailings to out-of-town recipients: N/A

Other Promotions: _____

A link to the CVB must be included on your promotional handouts and in your website for booking hotel nights during this event. Are you able to comply? Yes No

Will you negotiate a special rate or hotel/event package to attract overnightstays?

No, in October the rates are so low I don't think it is fair to ask for more discounted rooms. Mainly

[If we have a tour operator, we will require them to use that service.]

What other marketing initiatives are you planning to promote hotel and convention activity for this event?



What geographic areas does your event reach?
Mainly Texas, and Oklahoma. Mexico to Monterrey.

If the funding requested is related to a permanent facility (e.g. museum, visitor center):

- Expected Visitation by Tourists Monthly/Annually: _____
- Percentage of those who visit the facility who indicate they are staying at area hotels/lodging facilities: _____% (use a visitor log that asks them to check a box if they are staying at an area lodging facility)

What amount of event insurance do you have for your event and who is the carrier:

[Insert South Padre Island Minimum Event Insurance Coverage Minimums and duty to list South Padre Island as an additionally insured]

Any marketing for the event must be consistent with the brand image for South Padre Island and all such marketing pieces that are funded with hotel tax must be coordinated and developed by the South Padre Island CVB marketing agency. Are you able to comply?

Yes No

Where appropriate, the CVB will require access to event participant database information that will show zip code data to measure likely impact from the funded event.

SUPPLEMENTAL INFORMATION REQUIRED WITH APPLICATION:

Along with the application, please submit the following:

- Proposed Marketing Plan for Funded Event
- Schedule of Activities or Events Relating to the Funded Project
- Complete budget for the Funded Project
- Room night projections, with back-up, for the Funded Event

Submit to complete applications to:

Marisa Amaya
Event Development Manager
C/O City of South Padre Island Convention and Visitors Bureau
7355 Padre Blvd.
South Padre Island, TX 78597
Phone: (956) 761-3834
Email: marisa@sopadre.com



South Padre Island Convention & Visitors Bureau Special Event Applicant Checklist

THIS FORM MUST BE COMPLETED BY APPLICANT

SPI Pride

7.11.2019

Name of Event

Date Submitted

- Received and understood the separate **Special Events Policy**
- Completed the **South Padre Island Hotel Tax Funding Application form**
- Enclosed a description of all planned activities (or provided in application form)
- Enclosed a sponsor list (categorized by "confirmed" and "pending")
- Enclosed a vendor/exhibitor list (categorized by "confirmed" and "pending")
- Enclosed an event map
- Enclosed security/safety plans
- Enclosed a detailed budget
- Enclosed an advertising and promotion plan
- Enclosed copies of promotional materials (if available)
- Enclosed a summary of previous special event experience of organizer(s)
- Enclosed a history of event (if previously produced)
- Indicated the type(s) of assistance requested
- Indicated the amount of financial support (if requested)

Authorized Signature

Date

Jay Carlsen

Print Name



Marketing Plan SPI PRIDE October 2019

\$1000.00 Face Book advertising

\$800.00 Web Page marketing

\$1000.00 Flyers & Posters

\$3000.00 Pamphlets

\$3000.00 Road Trips to: Houston, San Antonio, Dallas, Austin, McAllen promoting at local gay bars and festivals

Via Phone, Emails, Face Book, word of mouth Net working with, gay bars, and organizations / clubs (no cost)

Press releases , Channel - 4 , Channel - 5, Channel – 23, Port Isabel Press, (No Cost)

Room Night Projects SPI PRIDE October 2019

Oct 9th Wednesday 30 rooms

Oct 10th Thursday 50 rooms

Oct 11th Friday 120 rooms

Oct 12th Saturday 300 rooms

Oct 13th Sunday 50 rooms

Total Room Nights 550

SPI PRIDE October 2019

SCHEDULE ONLY

Dates **Oct 9th to 13th**

Wednesday Oct 9th

Margarita's on the Beach, pre-Party 8 to Close, Show around 9pm Mr & Ms SPI PRIDE 2019 contest 9pm, followed by Free Show

Thursday Oct 10th

Opening Pride Celebration at the Upper Deck Hotel 5 to close, Mr & Ms SPI PRIDE 2019 contest 10pm, followed by Show

Friday Oct 11th

Pool Party at the Upper Deck 12 noon to 6pm

Tequila Sunset, 8pm to close, Mr & Ms SPI PRIDE 2019 contest 9pm, followed by Show - \$20.00

Saturday Oct 12th

Pool Party at the Upper Deck 12noon to 6pm

Pride Party Cruise leaving at 6pm Sharp

Clayton's 8pm to close, Mr & Ms SPI PRIDE 2019 contest 9pm, followed by Show Plus announcement of Mr & Ms SPI PRIDE 2019

Sunday Oct 13th

Sunday Pride Brunch 9 to 1pm at Margarita's Beach Bar

Sunday Pride starting at Clayton's 12noon to 2pm for Parade assembly . Parade departs at 2pm and goes to the Entertainment District Parking Lot. Parade is a Free event, everyone welcome!

SPI PRIDE Budget

Staffing for event	\$3000.00
Road Trips to other Cities for promoting event	\$1500.00
Advertising material	\$2000.00
Promotional Giveaways	\$1000.00
Wrist Bands	\$500.00
Shuttle Service	\$1200.00
Internet Marketing	\$1000.00
Parade Expenses	\$1000.00
Entertainment Expenses	\$5000.00
Sound Equipment	\$2000.00
DJ's	1000.00
Cruise Party	\$1500.00
Total	\$20,700.00

**CITY OF SOUTH PADRE ISLAND
ADVISORY BOARD MEETING
AGENDA REQUEST FORM**

MEETING DATE: August 28, 2019

NAME & TITLE: Ed Caum, CVB Director

DEPARTMENT: South Padre Island Convention and Visitors Bureau

ITEM

Presentation and discussion of the Director’s Report

- Convention and Group Sales
- Special Events and Packaging
- Marketing and Communications
- Social Media
- Research and Analytics
- Director’s Notes
- Spring Break Results
- * Newsletter Analytics

ITEM BACKGROUND

CVA Board recommended for a monthly update to be given at the regular CVA Board Meetings.

BUDGET/FINANCIAL SUMMARY

COMPREHENSIVE PLAN GOAL

LEGAL REVIEW

Sent to Legal: YES: _____ NO: x _____

Approved by Legal: YES: _____ NO: x _____

Comments:

RECOMMENDATIONS/COMMENTS



CVB DASHBOARD

AUGUST 2019



TAX COLLECTION TIMELINES

HOT Tax is collected on the 15th of each month

30 day delay to reporting from end of month

15 day delay to collection from due date

Sales Tax is collected in Jan

45 day delay in reporting from the State of Texas to SPI

30 day delay in collection by the State

Property Tax is collected throughout the year but *primarily* in Oct, Nov, Dec & Jan

No delay in reporting

No delay in collection

Beverage Tax is collected quarterly (State Comptroller FY – begins Sep. 1)

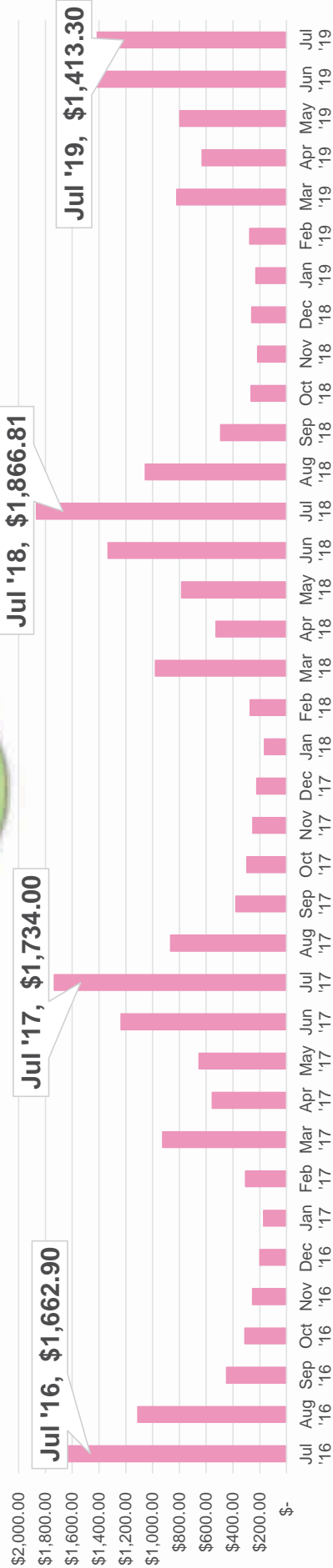
45 day delay in reporting from the end of the quarter

No delay in collection by the State of Texas

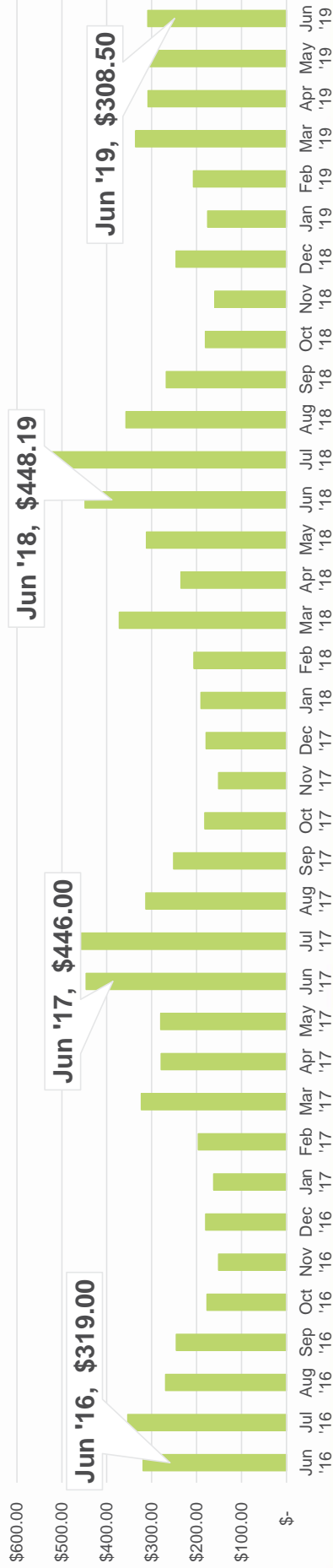
ECONOMIC IMPACT



Hotel Occupancy Tax (in 00,\$)

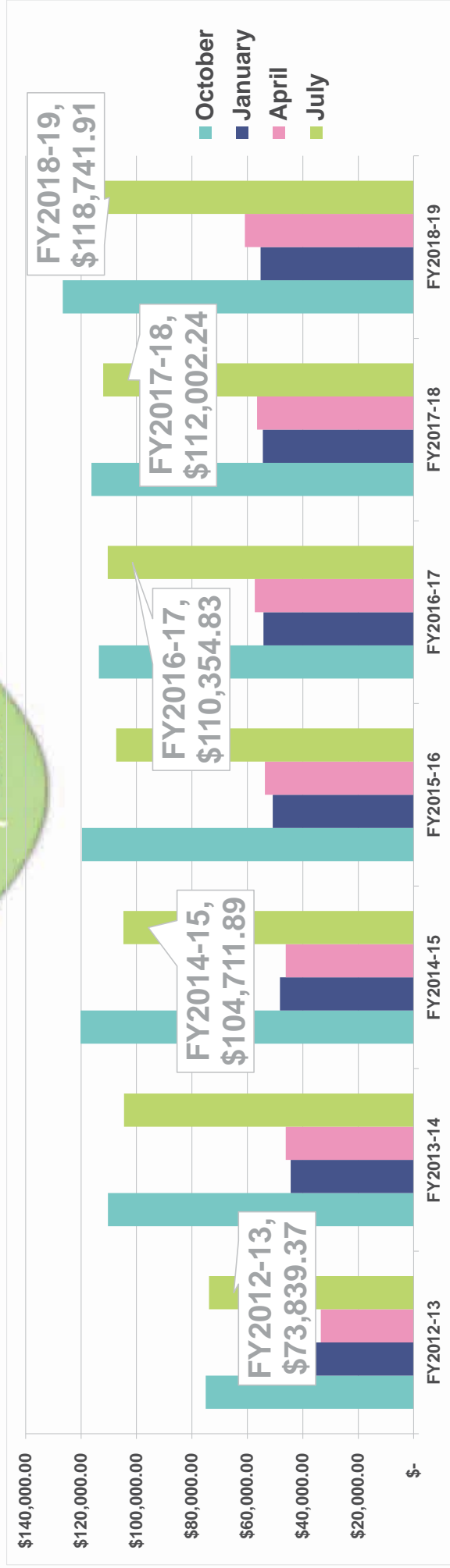


Sales Tax (in 100K,\$)



*2-month reporting delay for sales tax

Mixed Beverage Tax

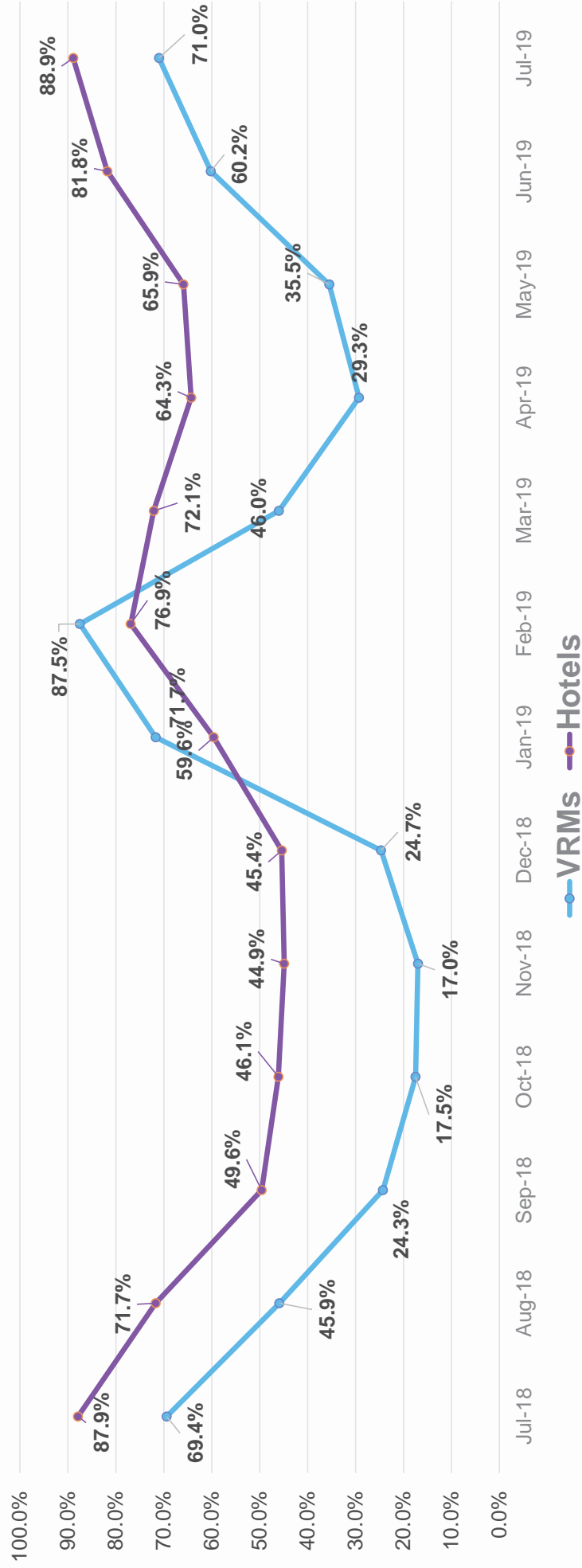


Month of Payment	Months Reported	FY 2018-19	FY 2017-18	FY 2016-17	FY 2015-16	FY 2014-15	FY 2013-14	FY 2012-13
October	Jun/ Jul/ Aug	\$126,584.28	\$116,263.73	\$113,583.54	\$119,689.50	\$120,182.68	\$110,335.73	\$75,021.74
January	Sept/ Oct/ Nov	\$55,210.97	\$54,403.20	\$54,183.63	\$50,872.08	\$48,216.13	\$44,381.48	\$36,262.66
April	Dec/ Jan/ Feb	\$60,854.30	\$56,500.33	\$57,300.10	\$53,660.35	\$46,148.41	\$46,128.34	\$33,533.70
July	Mar/ Apr/ May	\$118,741.91	\$112,002.24	\$110,354.83	\$107,354.93	\$104,711.89	\$104,505.64	\$73,839.37
Total		\$361,391.46	\$339,169.50	\$335,422.10	\$331,576.86	\$319,259.11	\$305,351.19	\$218,657.47

*Only updated/reported quarterly

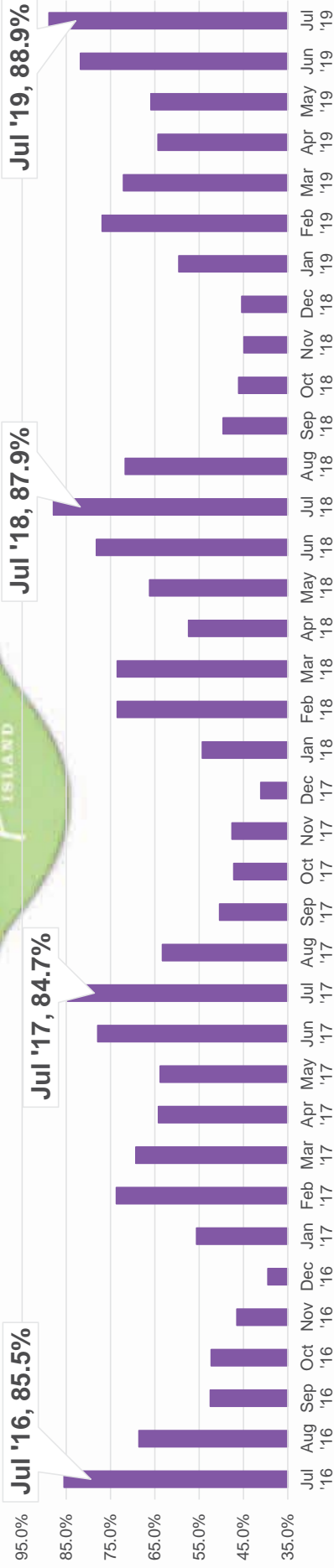


Occupancy - July '18 thru July '19 VRMs vs Hotel (STR vs. KeyData)

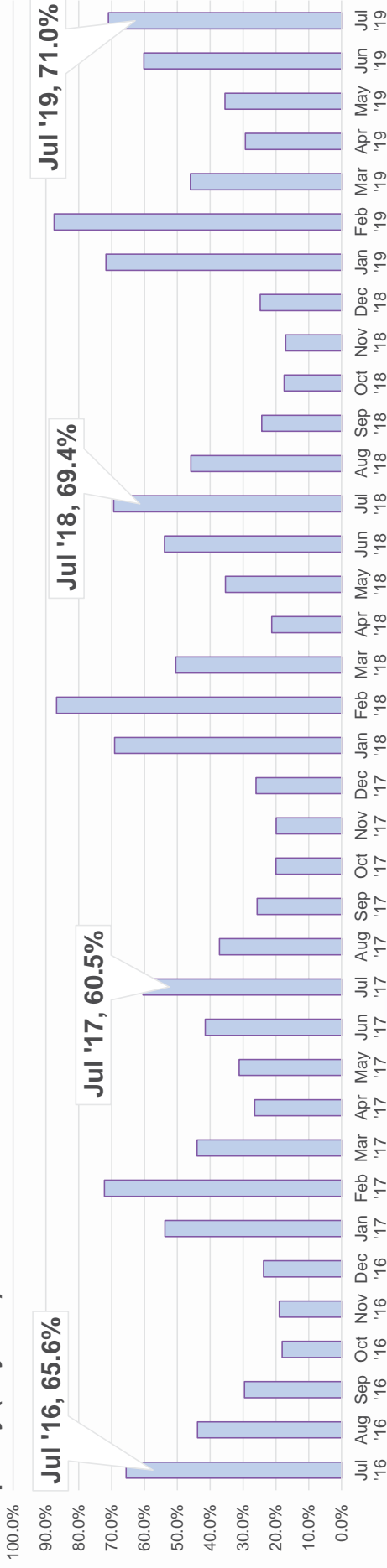


ECONOMIC IMPACT

Hotel Occupancy (STR)

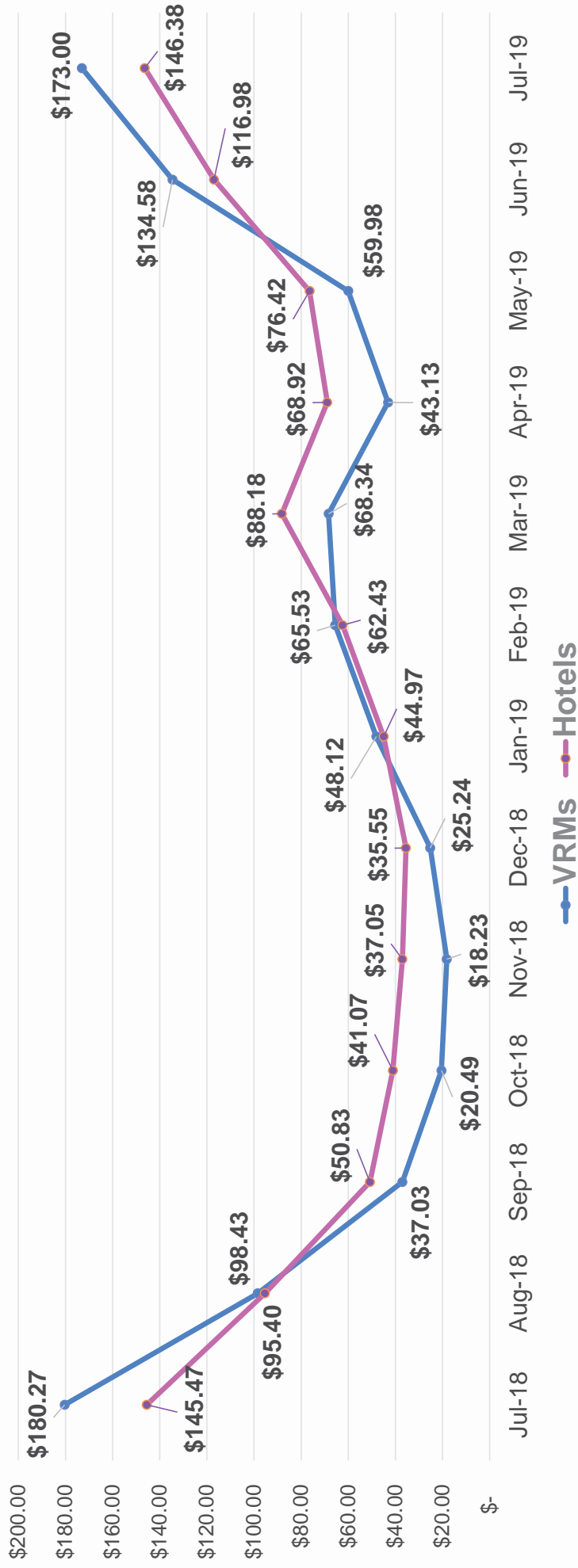


VRM Occupancy (KeyData)



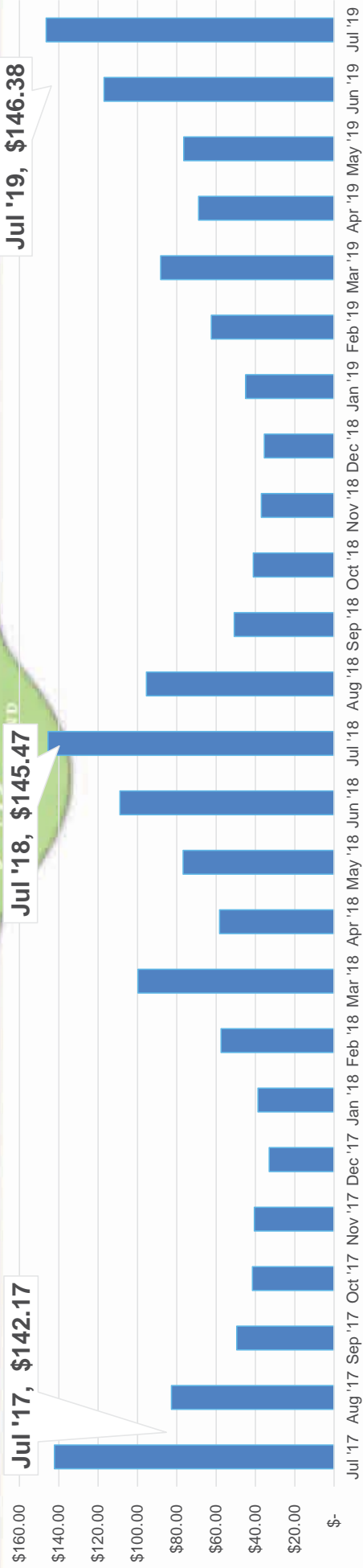


RevPAR - July '18 thru July '19 VRMs vs Hotel (STR vs. KeyData)

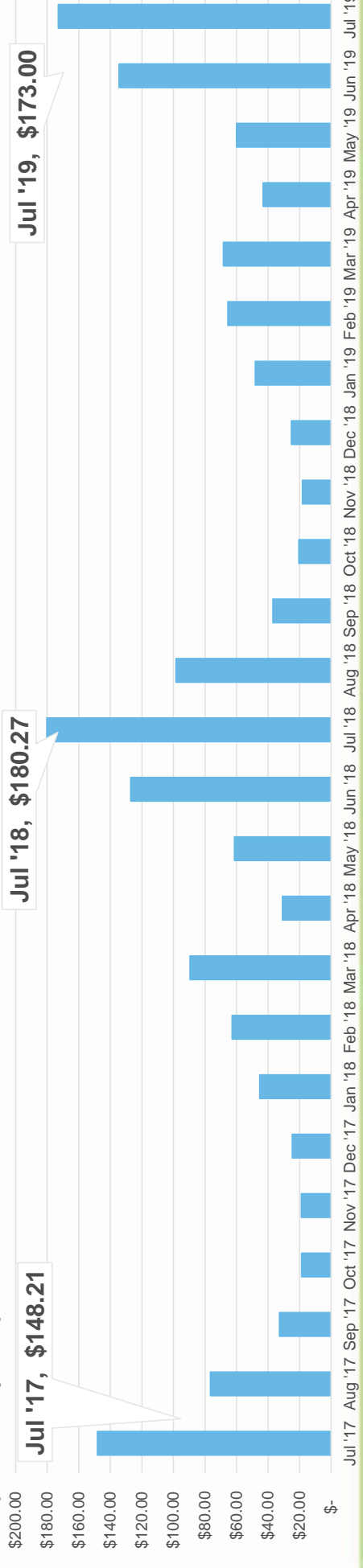


ECONOMIC IMPACT

RevPAR (Hotels-STR)

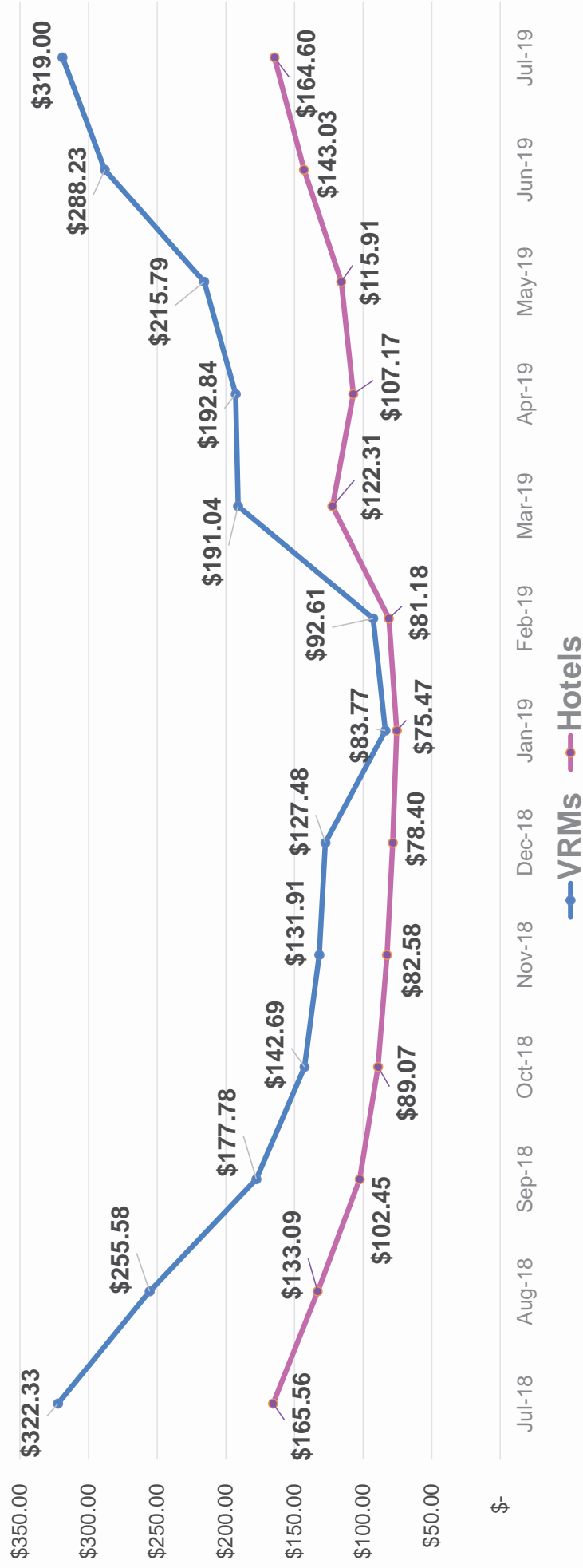


RevPAR (VRMs-KeyData)





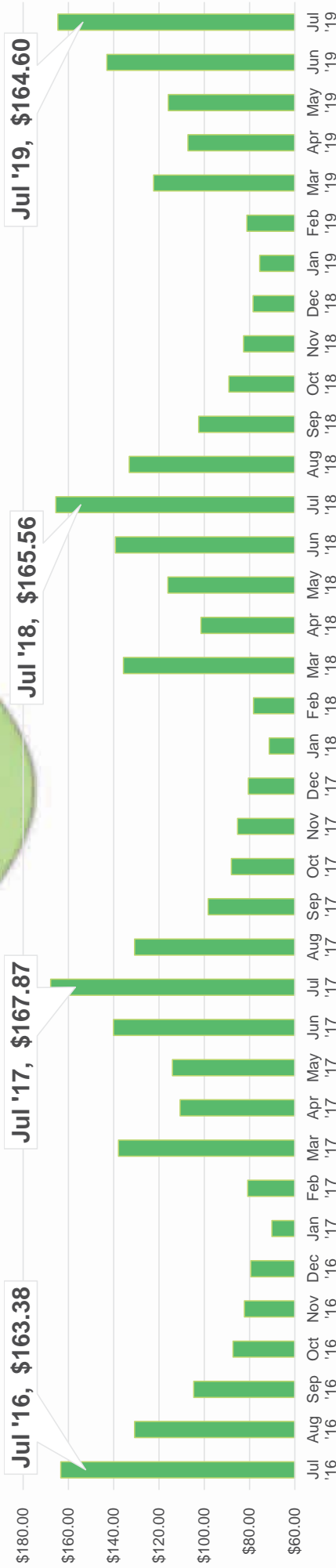
ADR - July '18 thru July '19 VRMs vs Hotel (STR vs. KeyData)



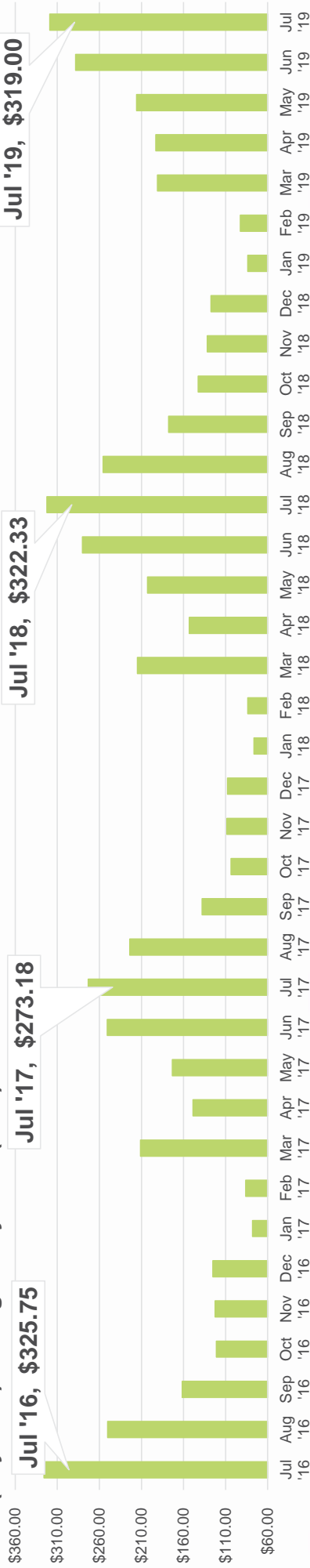
ECONOMIC IMPACT



Hotels (STR) Average Daily Rate (ADR)



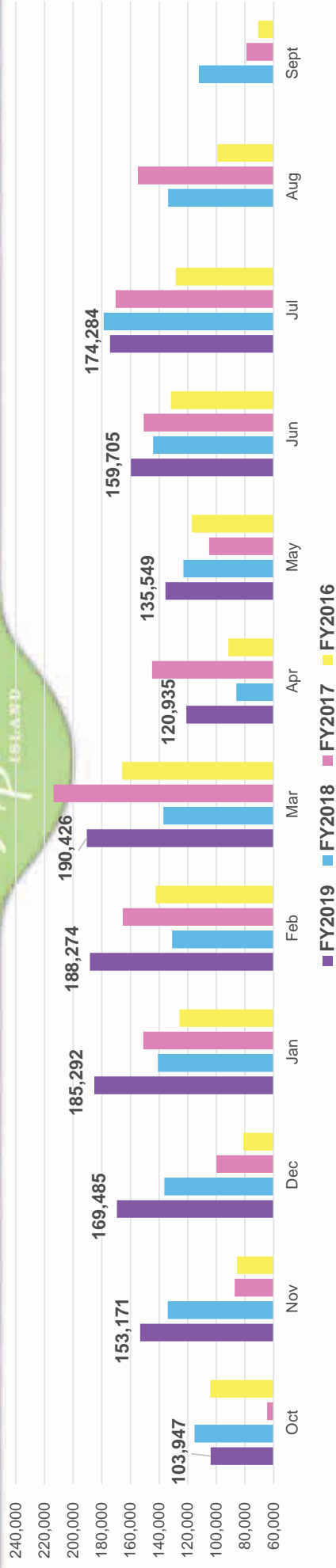
VRMs (Key Data) Average Daily Rate (ADR)



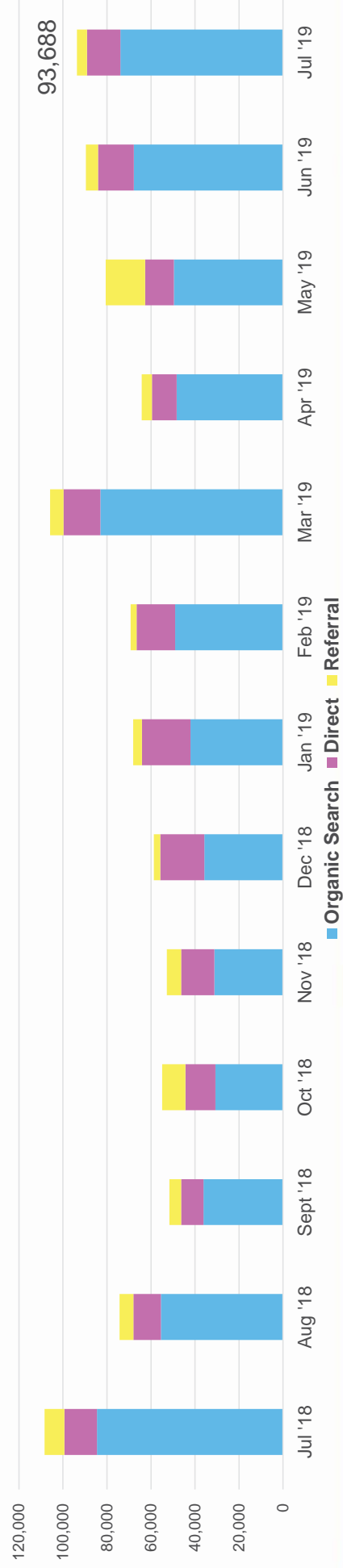
AWARENESS



Web Visits



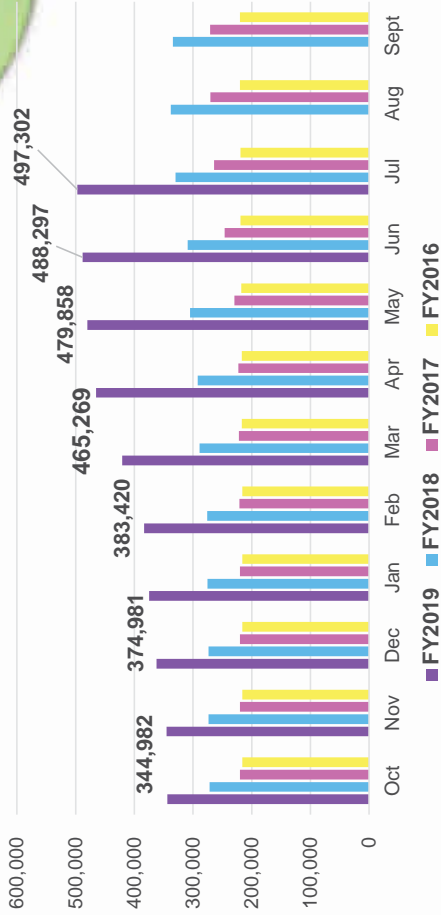
Sources of Website Traffic



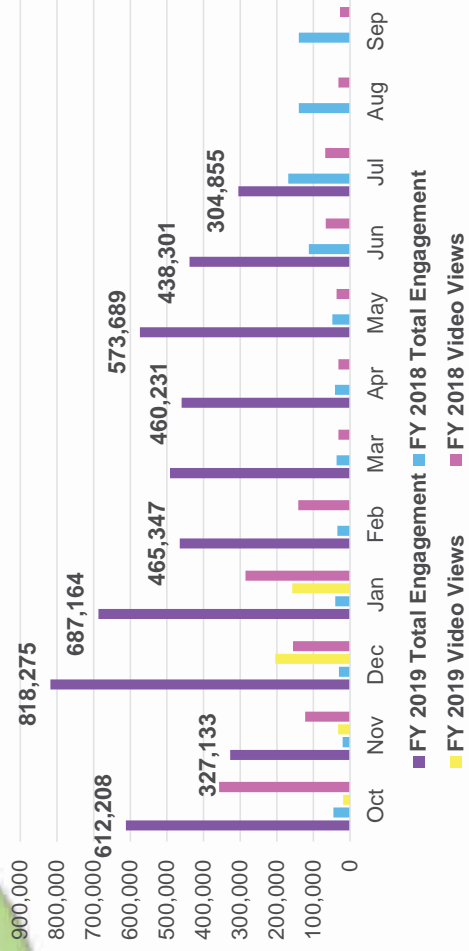
AWARENESS



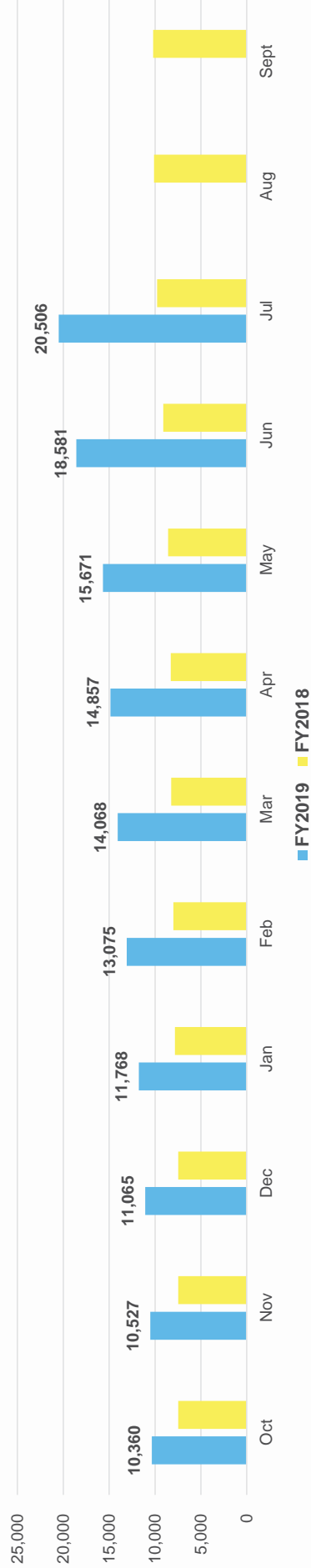
Facebook Likes/ Followers



Facebook Engagement



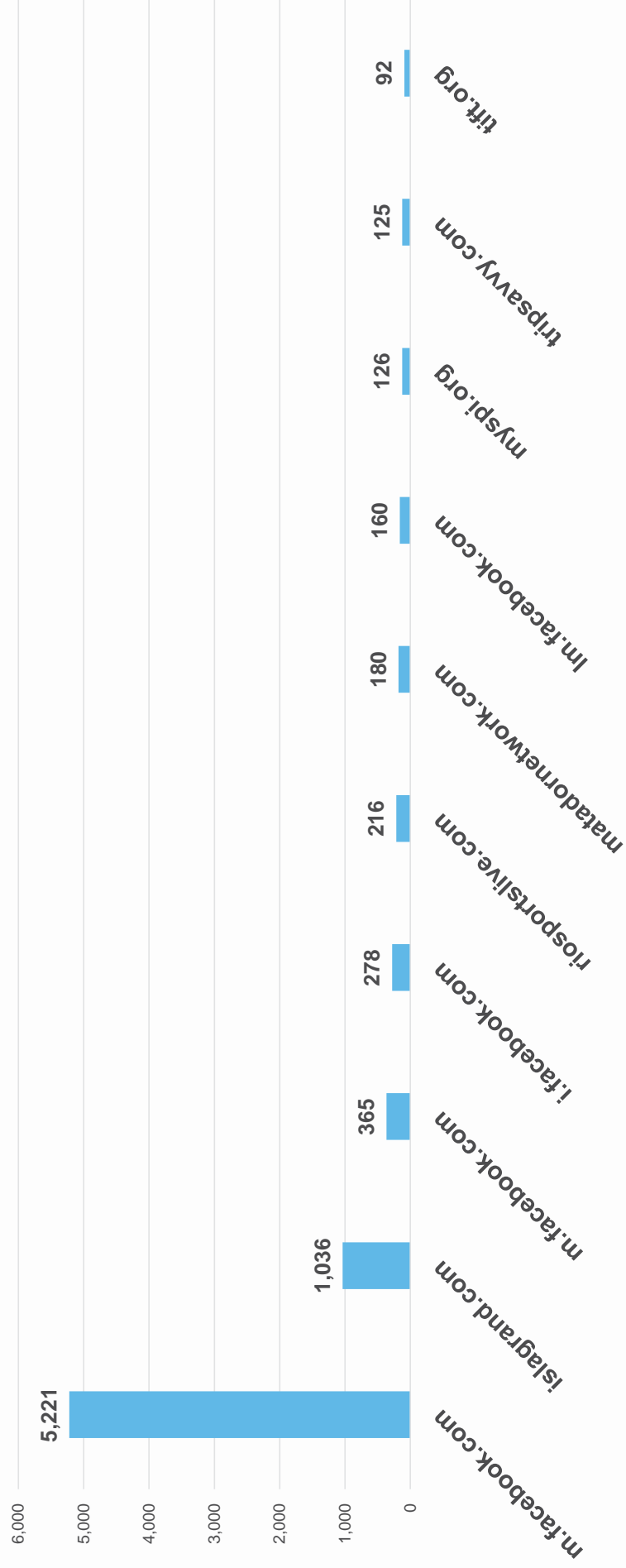
Instagram Followers



REFERRAL SOURCES



Top 10 referral sources to www.sopadre.com for the month of July 2019

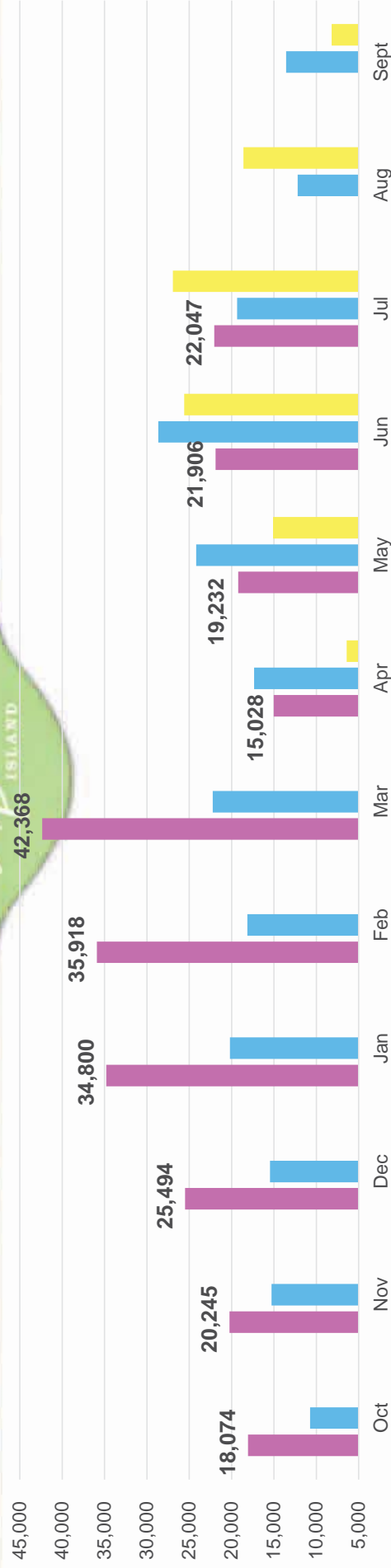


CONVERSION

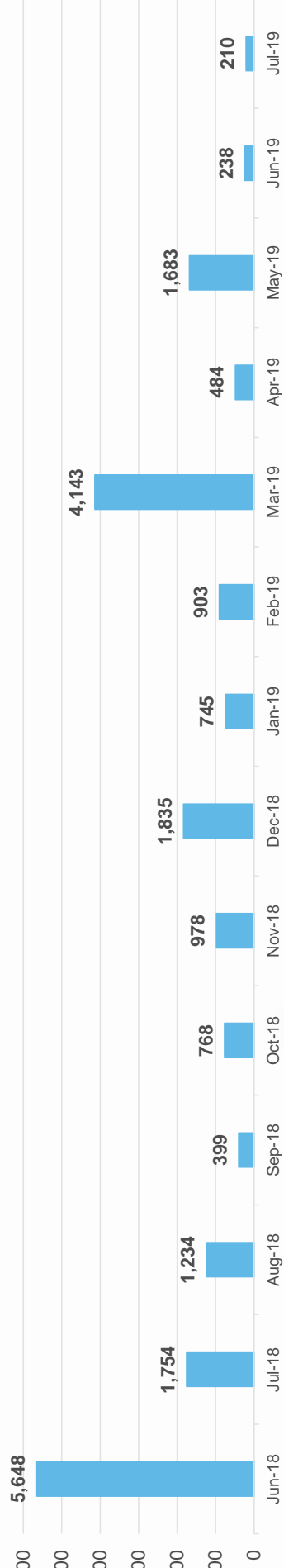
Outbound Partner Links



42,368



Visitor Guides Requests (Fulfillment House)





Convention and Group Sales

Group Sales Notes



Sales Blitzes-

- Elizabeth and our hotel partners had a 3.5 day blitz visiting clients all over the Valley. Our Christmas in July theme was a big success with clients enjoying everyone coming out to see them. We promoted Holiday pricing for our clients. Total amount of clients visited: 32
- Teri had a Sale Blitz in Austin with a few of our hotel partners that included a reception for some of our clients in the area. Teri and the hotel partners ended up with a couple of new leads from our clients that they can follow up with. The two-day blitz visited over 10 clients.
- Site visits with TNOA to finalize details for their convention in August.
- CVMA came in to finalize overflow properties for their 2020 annual conference.
- Conference Call with PRA Austin - large incentive 3rd party out of Austin for future incentive business.

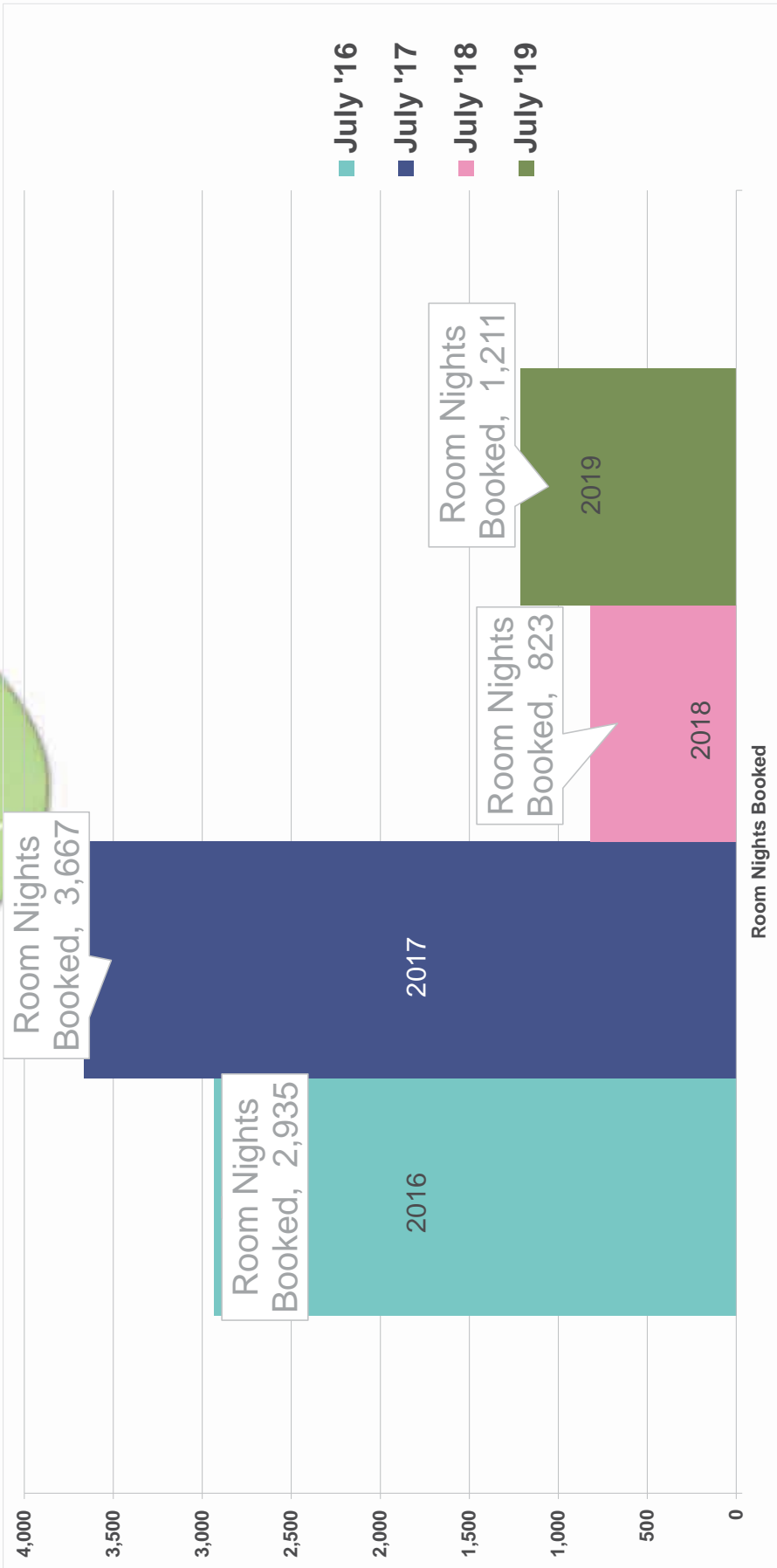
New/Returning Business Site Visits

- TCAAA Site for June 2021
- TNOA site visit
- Nat'l Insurance Crime Bureau
- Templo Bethel
- TASO
- Region One
- STCJCA 2021
- CVMA

ECONOMIC IMPACT



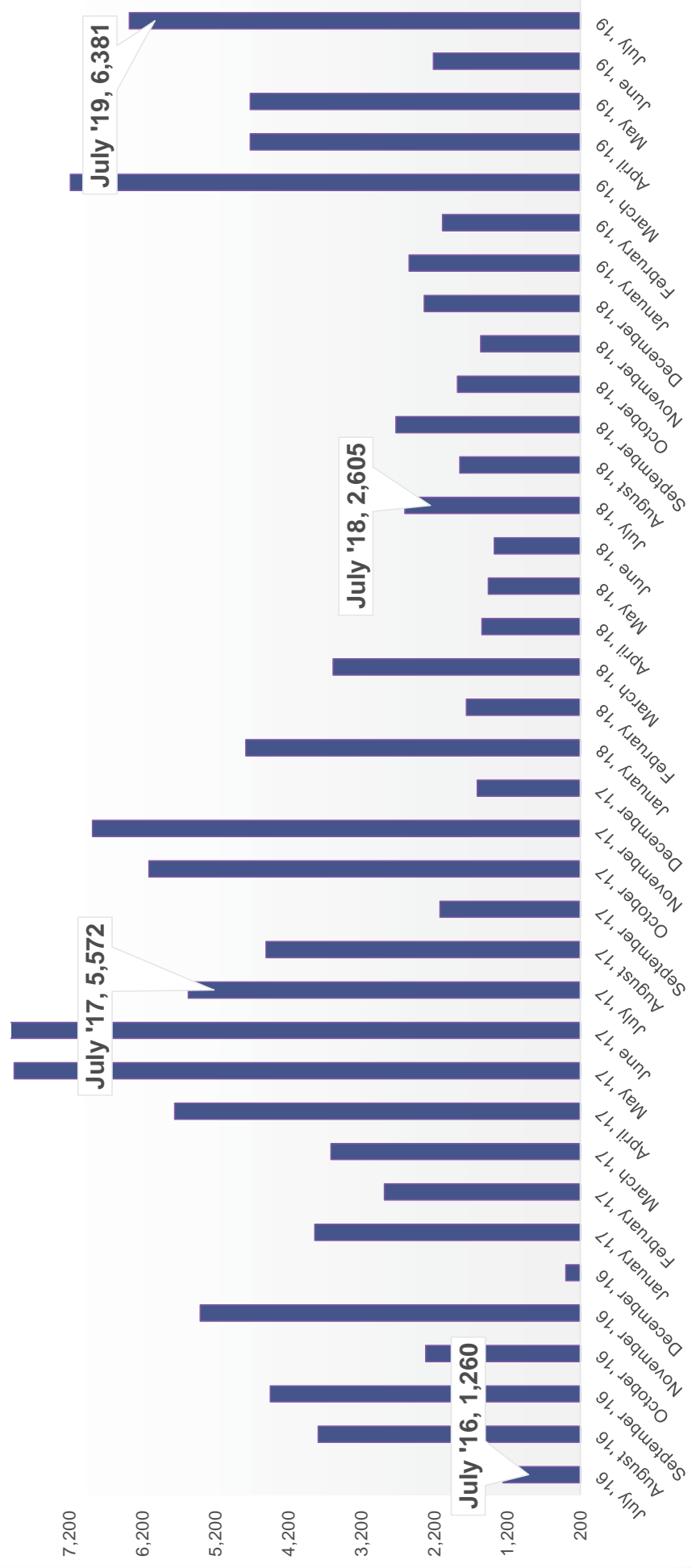
ROOM NIGHTS BOOKED – BY MONTH



CONVERSION

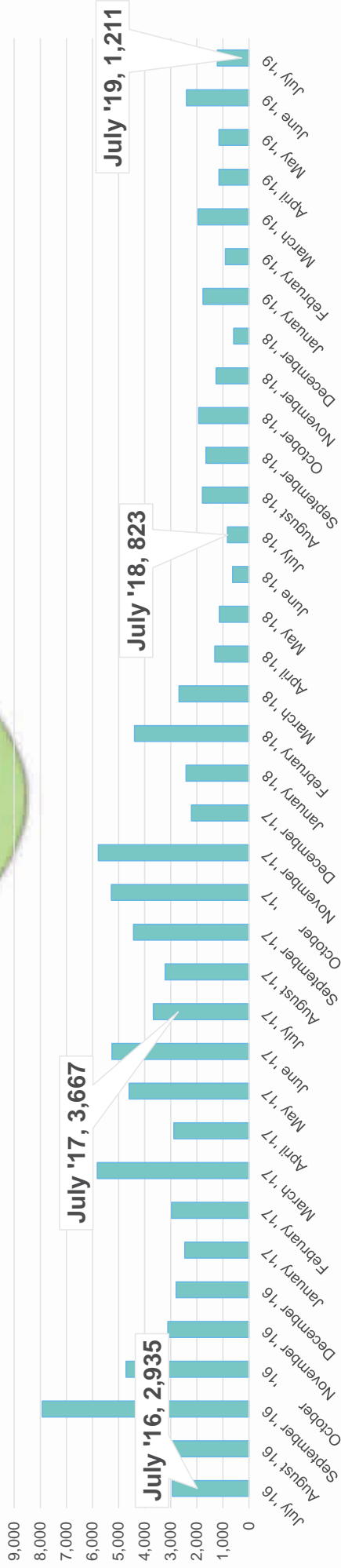


Group Leads Sent



CONVERSION

Group Business Booked



BOOKED BUSINESS

- Region One - May 2020
- SPI Annual Basketball Clinic - May 2020
- Tx A&M Agrilife - April 2020
- TX Society for Respiratory Care - April 2020
- RAV Run Adventures - November 2019
- Nat'l Insurance Crime Bureau - November 2019
- Templo Bethel - September 2019
- First Baptist Church of Edinburg - February 2020

TOTAL: 1,211



Pacing Report for Booked Business

2019	2020
<u>47,626</u> definite room nights	<u>30,496</u> definite room nights
<u>78,122</u> total booked room nights through December 2020 - Up from 74,236 in May, 2019	



Special Events Manager

CONVERSION

2019 Special Events



January

Polar Bear Dip
Longest Causeway Run/Walk
WOWE

February

SPI Kitefest
W4W Chili Cook Off

March

Spring Break Car Jam

April

National Tropical Weather Conference
SPLASH
Sand Crab Run

May

Jailbreak
Pedal to Padre
Shallow Sport Fishing Tournament

June

ProWater Cross
Dargel Fishing Tournament
Longest Causeway Run/Walk
Airshow

July

August

Texas International Fishing Tournament (TIFT)
Iron Pigs Motorcycle Club Weekend
Ladies Kingfish Tournament (LKT)
API Fishing Tournament
Fishing For Hope

September

Shallow Stalker Fishing Tournament
JJ Zapata Fishing Tournament
SPI Triathlon
Valley Haven Fishing Tournament
Wahoo Classic

October

SandCastle Ball
SandCastle Days
SPLASH
Walk For Women Fishing Tournament
Elite Redfish Championship
SPI Fishing Days
Ride for Rotary

November

Mariachi Run
SPI Beach 13.1 and Relay 5K
Honor Challenge OCR

December

Tree Lighting Ceremony
Christmas Parade
Lighted Boat Parade
Holiday Sand Castle Village
Breakfast with Santa



New Event

Special Event Manager Notes

Upcoming Fall Events

We are 90 days out from our Fall Events and working on permitting for them.

Sea Turtle Trail

We have already sent out the Call for Artists, and are working with a company that will provide the Sea Turtle structures.

Texas Festivals & Events Association

We attended the 2019 TFEA Conference in McAllen this month. TIFT won a gold place award in four categories: Best new merchandise, Best T-Shirt design, Best Hat, & Best company images. The SPI Mariachi Run won a gold award in Best Merchandise, and two bronze awards: one for the best t-shirt design and the other for best promotional poster.

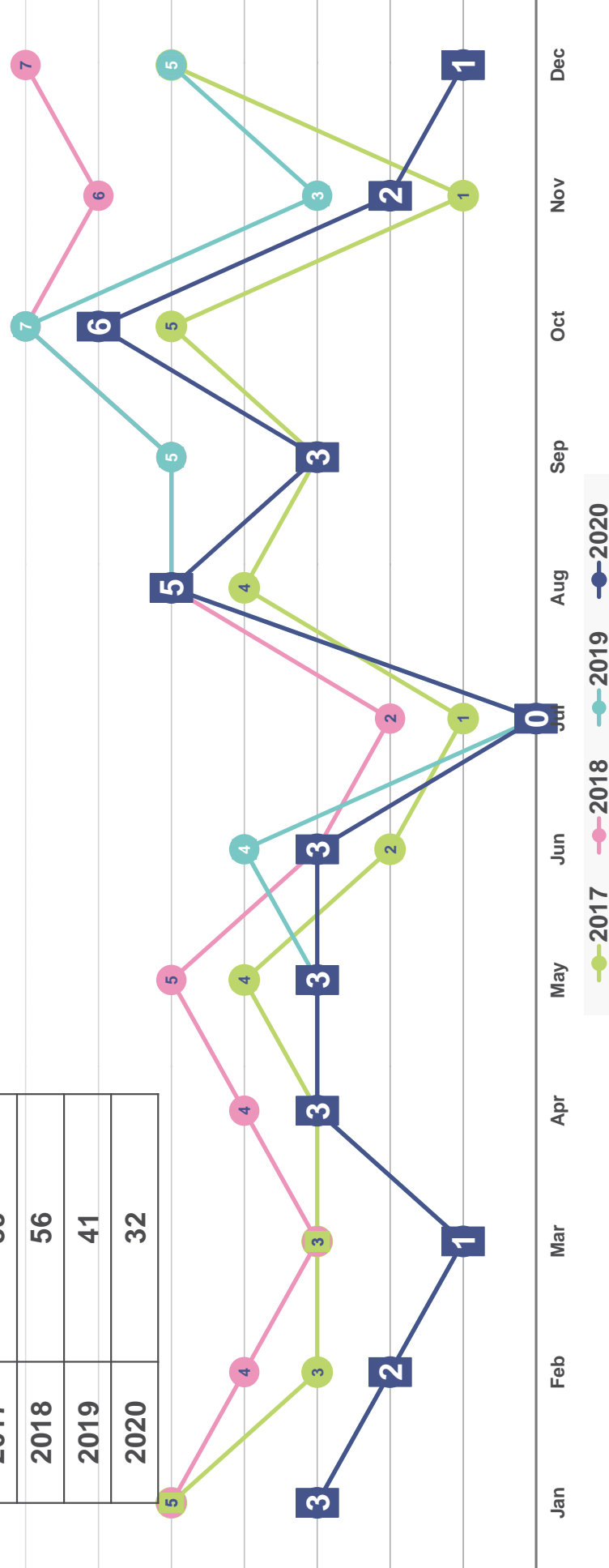
CONVERSION

Special Events



Year	Number of Events
2017	39
2018	56
2019	41
2020	32

Special Events per month from 2017 to 2020
(Sponsored Directly by SPICVB)

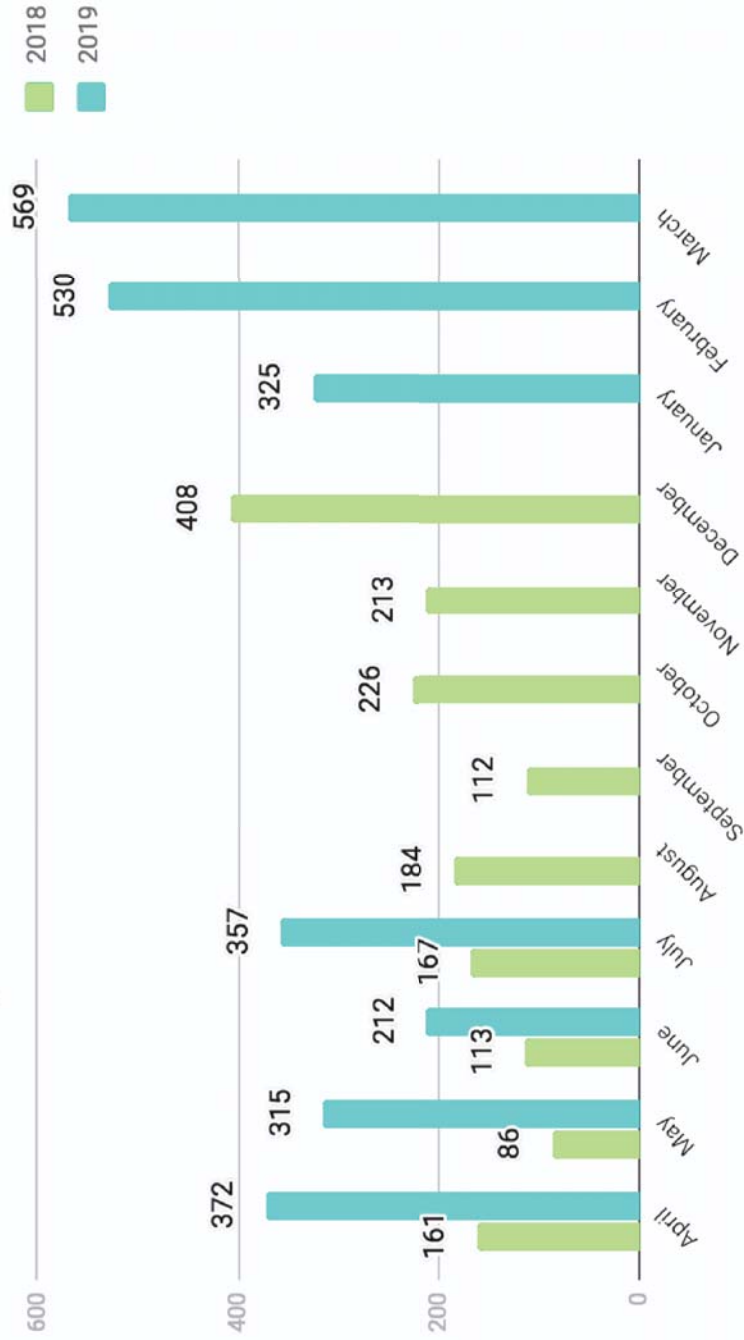




Marketing & Communications



Total Mentions By Month



357

Total Mentions

The total number of news stories for a specified time period.

1.2M

Total Reach (UVPM): 694.2M

A globally consistent baseline metric for measuring the reach of a media outlet.

\$503.0K

Total Publicity Value

A scoring system that creates an approximate value for a news article.

CISION



Activity Highlights | July 2019

Marketing & Communications




- Continuing efforts on Partner Engagement:
 - Business Listings Updates
 - Deals & Packages
 - Back to School/Labor Day
 - Newsletter
- Continued efforts on audience-specific website landing pages
- Assisting Sales team with DigitalEdge
 - Website updates to meetings/groups pages
 - Groups Sales Report Evaluation & Recommendations

Public/ Media Relations

- Hosted Summer Media FAM (July 23-26) which includes media from LA, Denver, Canada & Texas.
- Hosted additional media visiting the Island on various assignments.
 - July 25-28
 - July 28-31
- Preparations underway for upcoming fall media trips
 - August 7-13
 - September 12-15
- Continued efforts between the CVB marketing team and City Public Information Officer (PIO).



Group Stats by Profile/Page

Profile/Page	Total Fans / Followers	Fan / Follower Increase	Messages Sent	Impressions	Impressions per Message Sent	Engagements	Engagements per Message Sent	Link Clicks
 Visit South Padre @visitsouthpadre	8,572	5.67%	25	34,739	1,389.6	1,533	61.3	77
 South Pa... ical Travel Business Page	469,315	1.04%	14	5,012,679	358,048.5	46,198	1,008.6	14,657
 South Padre Island, ... @isitsouthpadreis...	19,320	3.69%	11	941,417	85,583.4	5,430	493.6	–



Top Posts by Engagement: Facebook

TOP POSTS BY ENGAGEMENT



**SOUTH PADRE ISLAND
TROPICAL TRAVEL**
7/19/2019 7:25 PM

Rare Manatee Sightings at South Padre Island | LAGUNA MADRE -- A manatee was spotted off the jetties at South Padre Island, nearlv 1,000

3,347
Engagements



**SOUTH PADRE ISLAND
TROPICAL TRAVEL**
7/19/2019 4:16 PM

Timeline Photos | Feelin' "crabby?" What if we told you that every hour is happy hour on South Padre Island? #feelgoodfriday Pier19

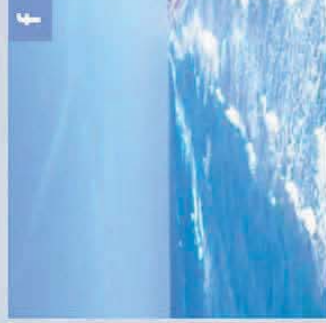
1,355
Engagements



**SOUTH PADRE ISLAND
TROPICAL TRAVEL**
7/10/2019 2:09 PM

Timeline Photos | Happy National Piña Colada Day from South Padre Island!!! @rbphotography | https://www.facebook.com/sopadre/

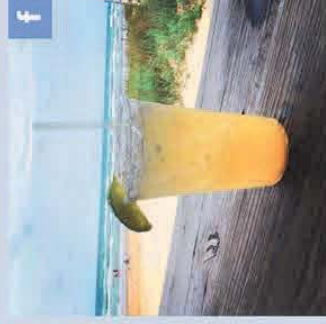
1,282
Engagements



**SOUTH PADRE ISLAND
TROPICAL TRAVEL**
7/12/2019 4:13 PM

The beach is our happy place! The beach is our happy place... @castnblasts | https://www.facebook.com/sopadre/

1,166
Engagements



**SOUTH PADRE ISLAND
TROPICAL TRAVEL**
7/5/2019 4:15 PM

Timeline Photos | Everyone should be believe in something. I believe I should be on the beach drinking a margarita. #FeelGoodFriday

1,095
Engagements



Top Posts by Engagement: Instagram

TOP POSTS BY ENGAGEMENT

	<p>SOUTH PADRE ISLAND, TEXAS 7/19/2019 5:40 PM</p> <p>Feelin' "crabby?" What if we told you that every hour is #happyhour on #SouthPadreIsland? #feeloodfriday (Location: Pier 19)</p> <p>982 Engagements</p>
	<p>SOUTH PADRE ISLAND, TEXAS 7/12/2019 1:26 PM</p> <p>The #beach is our #happyplace... @castnblasts</p> <p>912 Engagements</p>
	<p>SOUTH PADRE ISLAND, TEXAS 7/10/2019 10:54 AM</p> <p>Happy #NationalPiñataDay from #SouthPadreIsland!!! @rbdphotography #nationalpinacoladav</p> <p>714 Engagements</p>
	<p>SOUTH PADRE ISLAND, TEXAS 7/11/2019 4:01 PM</p> <p>¿Cómo se dice ceviche? @yummsam (Location: Ceviche Ceviche)</p> <p>662 Engagements</p>
	<p>SOUTH PADRE ISLAND, TEXAS 7/13/2019 2:32 PM</p> <p>Greetings from #SouthPadreIsland! @patydlf796</p> <p>625 Engagements</p>



Top Posts by Engagement: Twitter

TOP POSTS BY ENGAGEMENT



VISIT SOUTH PADRE
7/15/2019 7:01 PM

🎵 Just keep swimming, just keep swimming... 🎵 @kersten.paige #southpadreislandtx #southpadreisland #southpadre #sopadre #sopadretx #spi

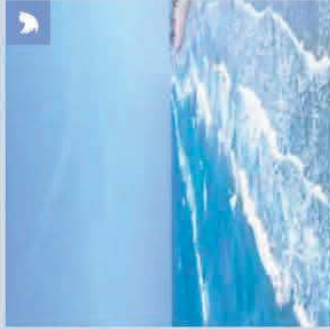
89
Engagements



VISIT SOUTH PADRE
7/23/2019 4:22 PM

#Beach more, worry less. 📷 @kirknoakersr #southpadreislandtx #southpadreisland #southpadre #sopadre #sopadretx #spi https://t.co/UJfKdJxhL

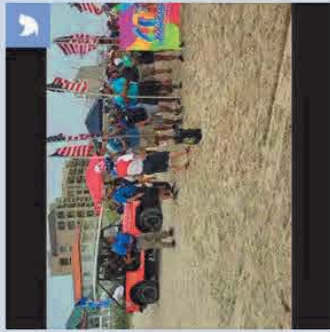
83
Engagements



VISIT SOUTH PADRE
7/12/2019 11:28 AM

The #beach is our #happyplace... 📷 @castnblasts #southpadreislandtx #southpadreisland #southpadre #sopadre #sopadretx #spi #saltlife

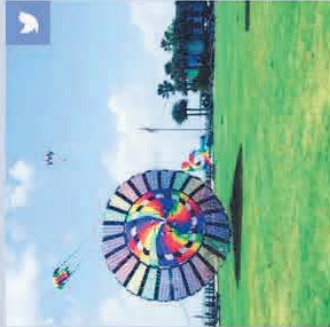
64
Engagements



VISIT SOUTH PADRE
7/4/2019 12:15 PM

So Patriotic. So Padre! Happy Fourth of July from South Padre Island! #sopadre #southpadre #spi https://t.co/1kx6zfl6i

53
Engagements



VISIT SOUTH PADRE
7/18/2019 7:06 AM

🎵 Let's go fly a kite... 📷 @kittékouple #southpadreislandtx #southpadreisland #southpadre #sopadre #sopadretx #spi #thegreens #jimsplier #kiter's

46
Engagements

CVB Director Notes



Sea Turtle Trail – South Padre Island

The Sea Turtle blanks have been ordered. The Call for Artists closes August 30th. Things are progressing on track.

Visitors Center Renovation Update

The Visitors Center has been relocated to the Multi-Modal but we are still staffing the old Visitors Center until the renovations begin for the Museum. Council approved going out for RFQ for adding and additional entrance solely for the Chamber. Council also directed the City Manager to enter into talks with the Museum.

Visitors Center Part-time Position Update

We have conducted interviews for a Part-time Visitors Center Information Counselor. and an offer is being extended. Beginning in October all Visitor Center employees will rotate working on weekends.

Director Interaction with TAG

The monthly meetings with TAG in San Antonio are working out very well. The face-to-face has been very beneficial to both parties.

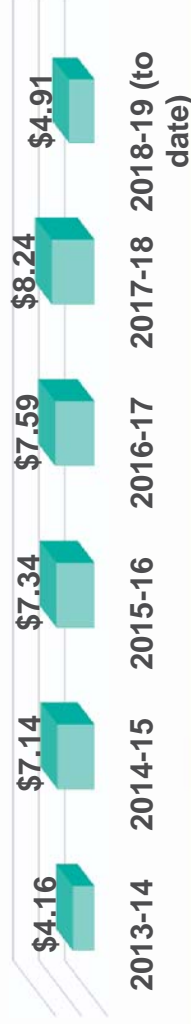
Strategic Plan

The Strategic Plan is on hold until after the new fiscal year. The Council wants the wait until the island slows down to ensure all parts will have time to participate.

Billboard Advertising

We continue to have five billboards across the RGV touting direct flights into BRO and VIA. They are also advertising special events we have scheduled on the Island. The special events change as new event dates approach.

Hotel/Motel Tax Collections (\$MM)



■ Hotel/Motel Tax Collections

**CITY OF SOUTH PADRE ISLAND
ADVISORY BOARD MEETING
AGENDA REQUEST FORM**

MEETING DATE: August 28, 2019

NAME & TITLE: Ed Caum, CVB Director

DEPARTMENT: South Padre Island Convention and Visitors Bureau

ITEM

New Business:

- Board Comments

ITEM BACKGROUND

BUDGET/FINANCIAL SUMMARY

COMPREHENSIVE PLAN GOAL

LEGAL REVIEW

Sent to Legal: YES: _____ NO: x _____

Approved by Legal: YES: _____ NO: x _____

Comments:

RECOMMENDATIONS/COMMENTS

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