

PASCO COUNTY
FACILITY NEEDS ASSESSMENT
NOVEMBER 2011

*Conducted by the Florida Sports Foundation as an Industry Partner service for the
Pasco County Sports Commission.*



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Introduction

In July 2011, the Florida Sports Foundation began work on a request by the Pasco County Sports Commission (PCSC), to conduct a facility needs assessment of Pasco County. The purpose of this study is to assist PCSC in providing a strategic assessment of the current inventory of competition quality sport facilities and to identify the County's needs for sport venues that would generate economic impact through the development of sport tourism in the area. This study is not intended to analyze the area's need for community sport facilities that service recreational or scholastic programming. However, the recommendations in this report may provide opportunities to serve the community's needs as a secondary benefit. In addition, the contents of this report may reference projects or land use in consideration, but does not serve as a feasibility study for the use of any property or real estate.

The Florida Sports Foundation worked in partnership with PCSC to identify facilities that can best serve as viable venues that would attract statewide, regional and national sport events, producing significant economic impact (major events) for Pasco County. The Foundation categorized these facilities based on common industry standards for event rights holders seeking communities in which to host major events. In addition, facility availability and cost associated with rental and use were taken into consideration. Foundation staff visited select locations and identified key facility owners and sport leaders in the community with whom to conduct interviews. Taking the results of this process and analyzing it against current industry trends, the Florida Sports Foundation is presenting this report identifying key strategic areas of consideration for investment in Pasco County's sport facility inventory.



Industry of Sport Tourism

In July 2005, the Florida Sports Foundation commissioned a report through the Washington Economic Group, Inc., to study the economic impact of sport in Florida. The study found that sport and recreation activities contribute to the economic development of Florida in two critical areas: (1) generator of economic output (gross state product, labor income, employment & fiscal revenues) (2) provider of benefits such as improving quality of life, providing an attraction for overnight visitors and facilitation of the recruitment, retention and expansion of business enterprises.

In 2005, this report found that the total economic impact of sport and recreation in Florida was an estimated \$32 billion, supporting 434,000 employment positions and providing for \$12.9 billion in annual labor compensation. Sport and recreation contributed \$20 billion in gross state product to the Florida economy and produces \$2.1 billion in revenues to state and local governments.

At the time of the report, there were 18 sports commissions in Florida, which did not include PCSC. The study reported that the economic impact of events sponsored by the 18 sports commissions is an estimated \$668 million, supporting 9,700 positions. Labor compensation generated from these events was \$245 million and contributed \$48 million in revenue for state and local governments.

Since that time, the number of sports commissions in Florida has increased to 21, creating more competition to attract major events to communities in the state. In 2010, the 21 sports commissions in Florida generated an estimated \$1.19 billion of economic impact. In addition, there are almost 400 active sports commissions in the U.S., competing to attract business to their communities. The market place will only continue to grow and become more competitive in the years to come, as more



communities begin to realize the positive impact of sport tourism. In Florida alone, the Florida Sports Foundation is aware of three (3) new areas considering the development of sports commissions, two of which are already actively seeking to attract sporting events to their communities.

In the 2010-2011 fiscal year, the Florida Sports Foundation awarded 46 grants to events which attracted out of state visitors. These 46 grants totaled \$366,000 and produced an estimated \$108,098,454 in out of state economic impact alone, attracting almost 200,000 out of state visitors, thus yielding a \$295 return on investment.

In the 2010-2011 fiscal year, PCSC was directly involved with sporting events that attracted 30,703 visitors to the area, generating 7,664 room nights and \$7,837,545 in economic impact. With an investment of \$78,490 for the FY 2010-2011 PCSC event sponsorships budget, PCSC is producing almost a \$100 return on investment for Pasco County. Therefore, for every \$1 spent on sports marketing, Pasco County is receiving almost \$100 in economic impact, which is within the average ROI range for small market, local sporting event grant programs. *Note: It is common for ROI to fluctuate from event to event and year to year, depending upon several market factors.*

Many communities have been making significant investments in building and developing new facilities or upgrading existing facilities to stay competitive in the market place. While historically a sports commission has been limited to marketing facilities that have been in existence for recreation purposes or private enterprise, there has been a significant movement to develop venues with the primary purpose of attracting events to the area, serving as a contributor to the local economy. One example is the Lake Myrtle Sports Complex in Polk County, Florida. With the departure of the Cleveland Indians in 2009, the Winter Haven/Auburndale area was prepared to see a significant decline in Spring Training tourism.



This dilemma and the increasing demand for new venues in the area sparked the development of the Lake Myrtle Sports Complex. Once a community park with three multi-purpose fields, Lake Myrtle Sports Complex was developed into a mega sports complex. Boasting five regulation (collegiate) baseball fields, 11 multi-purpose (soccer) fields, and 11 youth baseball fields as the beginning phases, the park also houses the Florida Sports Hall of Fame, Polk County Sports Marketing headquarters and the Florida Youth Soccer Association headquarters. When proposed, the facility was estimated to generate \$60 million in economic impact by hosting 75 events annually.

Such sport initiatives are being developed or considered in communities throughout Florida and the Nation. Leon County is currently conducting a feasibility study to build a tourism driven sport complex based upon a similar FSF facility needs assessment, the community of Lakewood Ranch (Sarasota/Manatee Counties) has constructed a 22 multi-purpose field (soccer) complex with plans to include baseball and softball fields, City of Newberry (Alachua County) is partnering with Nations Baseball to develop a 16 field baseball complex, the City of Newberry has also partnered with Easton to construct a regional Archery training and competition facility and Jonesville (Alachua County) has recently built a sports complex with four (4) Baseball fields, six (6) multi-purpose fields and 14 lit clay Tennis courts and one (1) tournament standard court. These are just some of the new sport facility initiatives currently happening throughout Florida. Pasco County's assessment of its facility inventory and long term-planning for investment in sport tourism is an important consideration to remain competitive in the market. Pasco County has a few community partners / facility owners willing to assist in its sport marketing efforts. City of New Port Richey Parks and Recreation Department, Little Everglades Ranch, Pasco County Parks and Recreation and Saddlebrook Resort, among others have supported PCSC for many years, offering their facilities when available. However, while gathering

research for this report, the Foundation found several trends in which can be counterproductive to Pasco County's sport tourism efforts.

In conducting interviews, it was determined that very few public facilities in Pasco County have been constructed for the primary purpose of attracting events to the area nor consider this to be a primary function of their operations. Most facilities have been developed for the purpose of providing local programming or service. In fact, the availability of several Pasco County Parks and Recreation facilities is contingent upon approval from the sport associations operating at the respective parks. One can observe the impact of this process, since there are very few PCSC assisted events held at County Parks, except for the sport of Lacrosse. In addition, many of the private facilities have their own business models and objectives that do not place a priority on hosting events for PCSC. It is the opinion of the Foundation that the community should consider developing more facilities with the primary purpose of attracting major events to the area, making local programming a secondary function.

Recommendations

Based upon research conducted of Pasco County's facility inventory, the Foundation has identified several strategic areas of consideration that would assist Pasco County Sports Commission's efforts of attracting major sporting events and broaden its current market. These recommendations have been presented on the following pages, categorized by facility type. Though these recommendations have been divided into sections for the purposes of this report, the Foundation is not suggesting that the facilities be considered as projects in separate venues / locations. If the opportunity is available to pursue the development of these facilities, there would certainly be benefits in considering sharing

resources and infrastructure by planning each recommendation as phases of an overall major sport complex plan.

Baseball and Softball Fields

For the purposes of this report, Softball fields are defined as competition quality diamonds with clay infields and grass outfields. It is recommended that Pasco County develop a Softball complex with a minimum of eight (8) fields. Special consideration should be made to fence line distances (using maximum fence distance for slow pitch, with portable fence system to adjust for all age divisions of slow and fast pitch play), lights, support facilities (scorer’s tower, administrative/meeting space, restrooms/locker rooms, officials changing room, etc...), parking, equipment (scoreboards, bracket boards, portable mounds), shaded spectator areas, batting cages and dugouts. If planned properly, such a facility can also host youth Baseball events with the use of portable mounds.

Currently, Pasco County has over 40 Softball fields of varying sizes including two (2) collegiate stadium fields. Only two multi-field competition level Softball complexes (each with three (3) fields) exist, leaving the remaining fields divided amongst 22 other venues scattered throughout Pasco County. Unfortunately, the current number of fields in one location is not adequate to attract major Softball events to the area. Though the County has many auxiliary complexes, most event rights holders view the use of multiple facilities as a negative for administrative as well as athlete experience. In addition to opening Pasco County to the Softball market, the development of such a facility would also help to attract youth Baseball events. Pasco is not lacking in Baseball fields, however the use of these facilities are limited due to local league scheduling and consent.

Pasco County benefits geographically since it is centrally located in the state, easily accessible and in close proximity to large population concentrations such as the Tampa Bay and Orlando metropolitan areas. However, its neighboring counties of Hillsborough and Polk are very active and large sport tourism markets, creating a highly competitive situation for PCSC.

In Polk County, the most popular multi-field Softball complexes are Diamondplex (5 fields), Auburndale Sports Complex (4 fields). In Hillsborough County, the larger Softball facilities are Ed Radice Sports Complex (5 fields), Greco Softball Complex (4 fields) and Plant City Stadium / Randy Larson Four Plex (5 fields). Therefore, a Softball complex of this size and design would become a contender for major tournaments.

One outstanding facility of this type in Florida is Brian Piccolo Park in Broward County. This County owned facility boasts 8 clay Softball fields, six adequate for adult slow pitch play and two of which have shorter fences for fast pitch softball or little league baseball. This 175 acre park also includes a world class Velodrome, Cricket stadium and passive areas for picnics, fishing and other activities.

Listed on the following page, is a small sampling of national and regional events that could be pursued with a Softball facility with a minimum of eight (8) full-size softball fields.



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Sport/Event	Organization Name	City	Year	Economic Impact	Room Nights
NJCAA Division III	National Junior College Athletic Association	N/A	2013	N/A	N/A
NAIA National Championship	National Association of Intercollegiate Athletics	N/A	2013	\$ 729,300	750-1050
NAIA National Championship	National Association of Intercollegiate Athletics	N/A	2014	\$ 729,300	750-1050
NFCA Leadoff Classic	National Fastpitch Coaches Association	Panama City Beach	2008	\$ 363,888	1,560
NFCA Leadoff Classic	National Fastpitch Coaches Association	Panama City Beach	2009	\$ 449,752	860
United Southern Girls Fastpitch World Series	United Southern	Pensacola	2008	\$ 1,402,048	2,098
United Southern Girls Fastpitch World Series	United Southern	Pensacola	2009	\$ 1,560,440	2,926
Senior Softball USA Tournament of Champions	Senior Softball USA	Polk County	2008	\$ 961,248	2,400
SPA Women's Spring Nationals	Softball Players Association	Pensacola	2009	\$ 205,276	288
ISA Girls Fastpitch World Series	Independent Softball Association	Brevard County	2009	\$ 3,432,690	2,700
USSSA Military World	USSSA	Panama City Beach	2009	\$ 850,818	1,512
USSSA Military Extravaganza	USSSA	Panama City Beach	2010	\$ 3,664,915	11,000
ISF Youth Softball World Cup	International Softball Federation	Tampa	2011	\$ 1,505,672	2,260
USF Softball Series	University of South Florida	St. Petersburg	2011	\$ 1,055,340	3,705
NSA Girls Fastpitch World Series	National Softball Association	Tallahassee	2011	\$ 2,033,350	4,125
USSSA Black American World Tournament	USSSA	Tallahassee	2011	\$ 756,906	1,552
Triple Crown College Showcase	Triple Crown	Fort Lauderdale	2011	\$ 2,910,325	7,231
USSSA AA World Series	USSSA	Pensacola	2008	\$ 1,764,112	3,734
USSSA AA World Series	USSSA	Pensacola	2009	\$ 1,829,807	4,228
Florida Half Century State Championships	Florida Half Century Amateur Softball Association	Various	2010	\$880,000	2,000

Gymnasiums & Multi-purpose Indoor Space

For the purposes of this report, Gymnasiums have been categorized as a facility with acceptable flooring, ceiling height, scoreboards, nets and lighting to conduct Basketball and Volleyball (Note: Gymnasiums can also host a number of other sports such as Badminton, Cheerleading, Gymnastics, Martial Arts, Table Tennis, Wrestling, etc... depending on facility design and with the addition of sport specific flooring, lines or equipment). The Foundation has used a regulation high school or collegiate size Basketball court as the standard when referencing the number of courts a gymnasium has, understanding that a regulation Basketball court can host multiple Badminton, Pickleball, Volleyball and other sport competition areas.

Multi-purpose indoor space refers to an indoor area such as a convention or civic center that can accommodate indoor sports with the installation of flooring, competition surface or sport specific

equipment. Like Gymnasiums, Multi-purpose indoor spaces can conduct sports such as Badminton, Basketball, Cheerleading, Gymnastics, Martial Arts, Table Tennis, Volleyball and Wrestling, depending on facility specifications.

The Foundation has identified a need for competition quality gymnasiums in Pasco County and would recommend the development of a facility with a minimum of three (3) courts. There are several individual gymnasiums throughout the County, which could serve as auxiliary facilities for a major tournament. However the two facilities that could be considered main competition venues are St. Leo University (2-3 courts) and New Port Richey Recreation & Aquatic Center (2 courts). With St. Leo University's gymnasium being shared with their athletic and student programs, the facility is currently over utilized, leaving New Port Richey Recreation & Aquatic Center as the more likely candidate to serve as a main tournament facility.

The flexibility that a multi-purpose gymnasium can provide when designed properly is a return-friendly investment in terms of sport tourism. The more courts included, the greater the space to conduct larger events or multiple events in one location. Careful consideration does need to be made to including spectator seating areas, court dividers, equipment, locker rooms and auxiliary meeting space. In addition, a multi-purpose gymnasium can also serve as a multi-purpose indoor space for certain types of events, helping to relieve the dependency on Saddlebrook Resort for the majority of events requiring indoor multi-purpose space.

Again, looking at Pasco County's neighbors, Polk County's largest gymnasium facility is at Florida Southern College (3 courts) and Hillsborough County's University of South Florida boasts a recreation center with 4 courts in addition to the courts found at the Sun Dome.

However, accessibility to each of these facilities is limited to athletic / recreation programming and cost. Reviewing Pasco County's facility inventory, there is a market in the area for a field

house complex with a minimum of three (3) courts. On a statewide scale, there is a market for a larger field house complex with a minimum of six (6) courts in Florida. A large field house would be unique to the state, since most large multi-court facilities are typically not accessible and those that are, are mostly three (3) court facilities.

Two excellent examples of three (3) court multi-purpose gymnasiums in Florida are the Coral Springs Gymnasium in Broward County, and the Estero Recreation Center in Lee County. The Coral Springs Gymnasium is owned/operated by City of Coral Springs, while the Estero Recreation Center is owned/operated by Lee County. Both facilities are utilized for regular recreation programming, but are accessible to outside events. In fact, the Coral Springs Gymnasium has included special events as a large part of their business plan over the years.

Two other considerations are the construction of new schools and partnering with St. Leo University. Lee County is a great case study of Parks & Recreation and Public Schools working together to construct facilities. Lee County's Veterans Recreation Center and Wa-ka-hatchee Recreation Center are examples of multi-court facilities that are shared between a school and a recreation center. The negative drawback to constructing school/recreation combined facilities is the constraints that school regulations can place on hosting outside events, especially during school hours. When interviewing St. Leo University staff, it was discovered that the current burden placed on the gymnasium due to athletic and student use would eventually yield the need of another facility. This could create an opportunity for a University/County shared facility, understanding that regular student activities could inhibit facility use for outside events.

A multi-purpose field house complex also allows flexibility in adding meeting space and specialty sport facilities such as a fitness center, racquetball courts and more that can generate

year round revenue to support operational costs. Listed below, is a small sampling of national and regional events that could be pursued with a competition level multi-court field house.

Sport/Event	Organization	Location	Year	Economic Impact	Room Nights
Women's & Men's Basketball Nat'l Champ	AAU	Cocoa	2008	\$ 57,760	777
AAU, Division II, (10U & 11U) Nat'l Basketball Championship	AAU	Cocoa	2008	\$ 2,437,776	4,566
AAU, Division I, (11U) Nat'l Basketball Championship	AAU	Cocoa	2008	\$ 2,981,328	3,942
29th Annual N. American Chinese Basketball Championships	NACBA	Broward County	2009	\$ 4,670,552	11,064
AAU Girls Basketball 12U Div II National Championships	AAU	Lee County	2009	\$ 1,105,650	2,280
AAU Div II Girls 13U Basketball National Championships	AAU	Cocoa	2009	\$ 1,628,328	1,890
AAU Div I Boys 11U Basketball Nat'l Championships	AAU	Cocoa	2009	\$ 2,604,025	1,582
AAU Div II Boys 11U Basketball Nat'l Championships	AAU	Cocoa	2009	\$ 1,051,888	2,030
AAU Division I Boys (11U) Basketball National Championship	AAU	Cocoa	2010	\$ 2,240,140	1,491
AAU Boys (11U) Division II Basketball National Championship	AAU	Cocoa	2010	\$ 1,181,349	2,051
USA Gymnastics Presidential Classic	USA Gymnastics	Broward County	2008	\$ 6,178,040	9,168
USA Gymnastics Women's Jr. Olympics Nat'l Championships	USA Gymnastics	Central Florida	2008	\$ 853,632	2,706
USA Gymnastics Region 8 Prep Optional Gymnastics Championships	USA Gymnastics	Panama City	2009	\$ 677,202	1,470
Acrobatic Gymnastics Jr. Olympic Nat'l Championships	USA Gymnastics	Central Florida	2010	\$ 1,055,818	2,290
Pan American Judo Confederation - Pan American Judo Championships	PAJC	Miami-Dade	2008	\$ 439,584	880
US Open Jr. Judo Championships & Training Camp	USA Judo	Broward County	2008	\$ 2,103,908	5,625
US Open Junior Judo Championships	USA Judo	Broward County	2009	\$ 1,971,170	5,870
US Open Junior Judo Championship	USA Judo	Broward County	2010	\$ 1,937,678	5,630
USA Judo Youth & Scholastic Championships	USA Judo	N/A	N/A	N/A	400-500
USA Judo Senior National Championships	USA Judo	N/A	N/A	N/A	500-600
USA Judo National Presidents Cup	USA Judo	N/A	N/A	N/A	250
USA Judo Junior Olympics	USA Judo	N/A	N/A	N/A	700-900
USA Judo US Open	USA Judo	N/A	N/A	N/A	500-600
Florida Citrus Cup	FCC	Miami-Dade	2008	\$ 235,080	188
AAU Karate Jr./Sr. National Championships	AAU	Broward County	2009	\$ 3,840,608	5,544
USA Karate do Nat'l Championships	USA Karate	Broward County	2009	\$ 9,528,594	27,726
USA Taekwondo National Qualifier	USA Taekwondo	Central Florida	2008	\$ 203,832	1,176
AAU Taekwondo Team Trials	AAU	Broward County	2008	\$ 421,116	1,436
USA Taekwondo National Qualifier	USA Taekwondo	Central Florida	2009	\$ 96,507	920
AAU National Taekwondo Championships	AAU	Broward County	2009	\$ 5,917,446	17,538
AAU Taekwondo Team Trials	AAU	Broward County	2009	\$ 478,344	1,720
AAU Taekwondo Nationals	AAU	Broward County	2010	\$ 6,012,834	17,682

Sport/Event	Organization	Location	Year	Economic Impact	Room Nights
USA Taekwondo Jr. Olympics & Sr. Nationals	USA Taekwondo	Central Florida	2010	\$ 4,447,852	11,964
NORCECA Boys Youth Volleyball Championships	NORCECA	Miami-Dade	2008	\$ 305,216	4,920
USA Volleyball Girls Junior Olympic Championships	USA Volleyball	Miami-Dade	2009	\$ 33,819,870	39,976
USA Volleyball High Performance Championships	USA Volleyball	Broward County	2009	\$ 1,862,792	14,498
Women's VIII Pan American Cup Championships	NORCECA	Miami-Dade	2009	\$ 874,000	625
National Collegiate Volleyball Championships	NCAA	N/A	2012 & 2013	\$ 6,006,000	3,500
Rocky Mountain Nationals; Games of Rome	RMN	Central Florida	2008	\$ 31,616	338
USA Powerlifting Masters Nationals	USA Powerlifting	Miami-Dade	2008	\$ 208,392	504
3rd IBSA World Bench Press & 6th IBSA World Powerlifting Championships	IBSA	Miami-Dade	2008	\$ 133,152	246

Other Comments & Recommendations

While conducting facility analysis and community interviews, the Foundation has developed a few additional comments / recommendations for consideration.

- 1) In touring Pasco County, it was noticed that the area is in need of a competition level long course aquatic complex. At this time, New Port Richey Recreation & Aquatic Center serves the local needs for swimming competition. Understanding that developing a profitable aquatic facility is a challenge, the Foundation is not recommending that Pasco County undergo such a venture at this time. However, if the opportunity ever arises to partner in the development of an aquatic facility, close attention should be made to design a facility with a 50 meter pool, an appropriate number of lanes for competition and warm-up, appropriate depth to accommodate various aquatic sports and a warm-up pool or diving well.
- 2) Pasco County has done an outstanding job of promoting itself as an eco-tourist destination and has carried that over into sport. Special attention should be made to the passive parks, especially those in the coastal area to development some eco-friendly sport facilities such as Beach Volleyball courts, competitive paddling courses or adventure racing courses. These

are sports that are growing in popularity and can produce a fair amount of exposure and tourism.

- 3) Another consideration is the development of suitable hotel properties in close proximity to competition venues. Pasco County has just over 3,000 hotel/motel rooms divided amongst 37 properties (800 rooms are at one property), many of which are not in close proximity to current facilities. In addition, most unrated properties or properties under 3 diamonds are deemed unacceptable by the average rights holder. Pasco’s ability to develop new hotel properties will play as significant of a roll on the potential growth of sport tourism as the development of new facilities

Conclusion

Sport in Florida is a major industry and has significant impact on tourism in communities investing in this market. With 21 Sports Commissions in Florida and many more nationwide, sport tourism is becoming more competitive each year as communities are beginning to realize their potential in using sport to drive their economic development efforts, especially in today’s economy. In addition to investing in marketing and attracting events, several areas are also looking to increase their inventory of competition facilities.

The Pasco County area has several multi-purpose recreation facilities and specialty facilities, some mentioned in this report. Many outstanding facilities were not specifically mentioned in this report, since the focus of the study is to conduct a needs assessment. The overall inventory of sport facilities in the community is fair for a smaller Florida market, but PCSC has done an outstanding job in exploiting its strengths in eco-tourism and local sport interests. A common trend found is that most County owned



facilities are only available based upon local league schedules. Other non-County facilities have found business models that do not always include hosting events for PCSC. Compounded with a minimal number of hotel/motel rooms available in close proximity to venues, these factors can present challenges to promoting the area as a sport tourism destination.

The Florida Sports Foundation recommends that Pasco County consider investing in a competition facility(s) with the primary purpose of hosting events that drive tourism to the community, while strategically balancing its current facility inventory. In no particular order or consideration of priorities, the recommendations were as follows.

Facility Type	Description	Estimated Acreage/Square Ft.
Baseball/Softball Fields	Multi-field sport complex with no less than 8 clay adult Softball fields with proper dimensions to host slow pitch softball, fast pitch softball or youth baseball.	45 – 55 Acres
Multi-court Gymnasium	Multi-purpose gymnasium with no less than three (3) regulation basketball courts and lining for other sports.	35,000-40,000 square feet

The Foundation is prepared to assist Pasco County, as an industry partner of the Foundation, in conducting any additional research needed while considering any of these recommendations. Any questions regarding this report can be directed to the Florida Sports Foundation, Attn: Stephen V. Rodriguez, 2930 Kerry Forest Parkway, Suite 101, Tallahassee, Florida 32309, 850-488-8347.