

PASCO COUNTY, FL



Sports Tourism Strategic Plan and Feasibility Report



INTRODUCTION

THIS SECTION PROVIDES AN OVERVIEW OF THE PROJECT AND SCOPE OF WORK



In July 2014, the Sports Facilities Advisory was contracted by Pasco County to complete a County-wide sports asset and sports tourism study. The goal of this study is to provide the County with a set of recommendations as to how to utilize its multiple recreation and sports facilities to create a destination to recruit youth and adult sports leagues, tournaments, and other events designed to increase sports and tourism.

The goal for this project is to provide Pasco County with specific recommendations and support services to enhance sports tourism and economic development/jobs creation through sports tourism-related initiatives.



The Sports Facilities Advisory and The Sports Facilities Management are the leading providers of feasibility analysis, new facility planning, and management services related to youth and amateur sports complexes.

Since opening in 2003, the firms have served a portfolio totaling more than \$4 billion in public and private sport and recreation complexes. The firms are most well known for helping communities turn ideas into action that results in new facility developments. Between 2013 and 2014, SFA|SFM will oversee the opening of more than 1.5 million square feet of indoor facilities and 600 acres of outdoor complexes. During this same period, SFA|SFM client facilities will host more than 15 million visitors.

For more background on SFA|SFM, visit www.sportadvisory.com.



This document provides:

- An overview of the scope of work
- An outline of the major steps within the research phase
- An overview of the market as it relates to local and regional populations and facilities
- A summary of the community engagement process with key stakeholders and the public at large
- An identification of success factors for sports tourism
- A set of market insights related to those success factors
- An optimization strategy and set of recommendations for the development of a successful sports tourism program



Scope of Work Overview

- Phase I
 - Market Study
 - Market Analysis
 - Regional Facilities Audit
 - Strategic Plan
 - Feasibility Report, Growth, and Optimization Plan
- Phase II
 - Community Needs/Demand Analysis
 - Public Participation



The Study Process

- Strategy meeting with County tourism experts
- Facility site tours
- County market and asset tour
- Fly-over of the County
- Interviews with County council members
- Interviews with County staff
- Interviews with key stakeholders, sports leagues/club representatives, and community members
- An online survey resulting in over 800 completed surveys



Following the delivery of this report, SFA|SFM representatives will engage in dialogue, questions and answers, and final updates to this report. This will result in an implementation plan that will then be overseen by County officials and SFA|SFM.

In the two years following the delivery of this report, SFA|SFM will provide consulting and other services to support the fulfillment of the final recommendations.



MARKET OVERVIEW

THIS SECTION PROVIDES AN OVERVIEW OF MARKET FACTORS



Comparative Demographics/Socioeconomics

	Total Population		Population Density		Pop. Growth 2014-2019	
	Total	Regional Rank	Total	Regional Rank	Total	Regional Rank
Citrus	138,116	10	220	9	6.30%	1
Hardee	28,522	12	45	12	0.30%	12
Hernando	174,137	9	356	6	8.70%	5
Hillsborough	1,301,314	1	1,210	3	7.60%	9
Lake	307,178	7	265	8	11.40%	3
Manatee	343,522	6	450	5	7.90%	7
Orange	1,246,329	2	1,242	2	8.70%	6
Osceola	301,259	8	200	10	13.50%	1
Pasco	474,565	5	620	4	9.70%	4
Pinellas	928,779	3	3,187	1	1.30%	11
Polk	623,795	4	310	7	7.70%	8
Sumter	107,948	11	186	11	12.20%	2



Comparative Demographics/Socioeconomics

	Med. Household Income		Median Age		% Under 20 Years Old	
	Total	Regional Rank	Total	Regional Rank	Total	Regional Rank
Citrus	\$35,989	11	55.0	11	17.12%	11
Hardee	\$33,611	12	33.1	1	30.30%	1
Hernando	\$40,851	10	48.4	10	21.28%	9
Hillsborough	\$47,480	1	36.6	4	25.99%	4
Lake	\$45,340	3	46.2	7	22.34%	7
Manatee	\$45,468	2	46.3	8	22.07%	8
Orange	\$44,380	5	34.1	2	26.29%	3
Osceola	\$41,186	9	35.7	3	28.47%	2
Pasco	\$41,941	7	44.2	6	22.75%	6
Pinellas	\$43,953	6	46.9	9	19.33%	10
Polk	\$41,420	8	40.2	5	24.14%	5
Sumter	\$44,950	4	64.2	12	9.39%	12



Existing County Field Inventory

Complex	Location	Size (Acres)	Long Fields	Diamond Fields
Wesley Chapel Park District*	Wesley Chapel	144	10	7
Samuel W. Pasco Recreation Complex	Zephyrhills	102	4	4
Land O' Lakes Rec Center*	Land O' Lakes	78	8	10
Burks Memorial Park	Dade City	60	2	8
Mitchell Park	New Port Richey	52	4	3
Veterans Memorial Park	Hudson	49	3	3
Engle Memorial Park	Hudson	40	2	2
Harrill Rec Center	Holiday	38	4	6
Elsie Logan Memorial Park	Spring Hill	28	1	4
San Antonio Sports Complex	San Antonio	13		3
Oak Ridge Park	New Port Richey	12		2
Pinehill Park	Port Richey	10		4

* - Potential host site for field-based sports tourism events



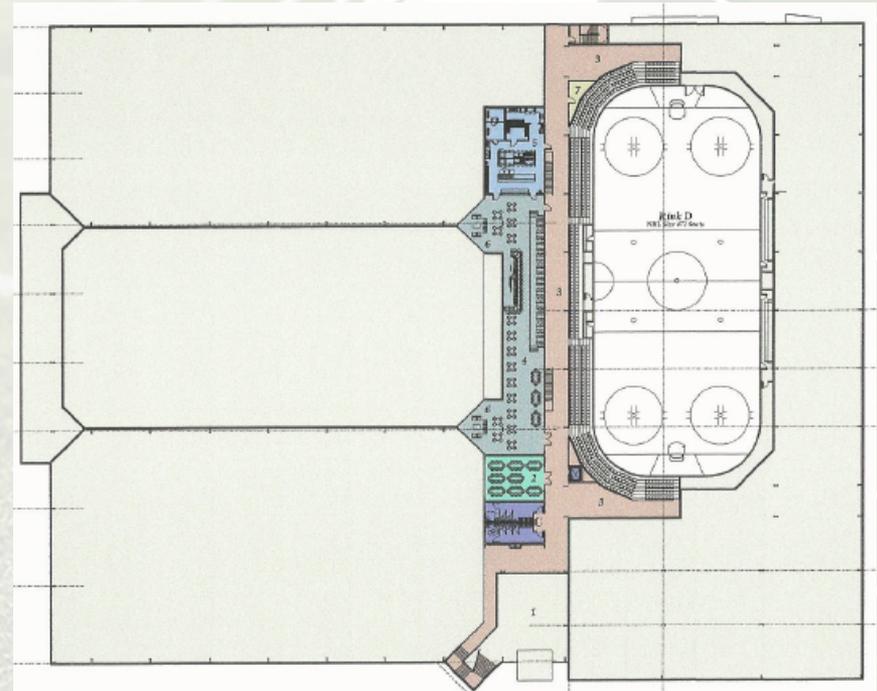
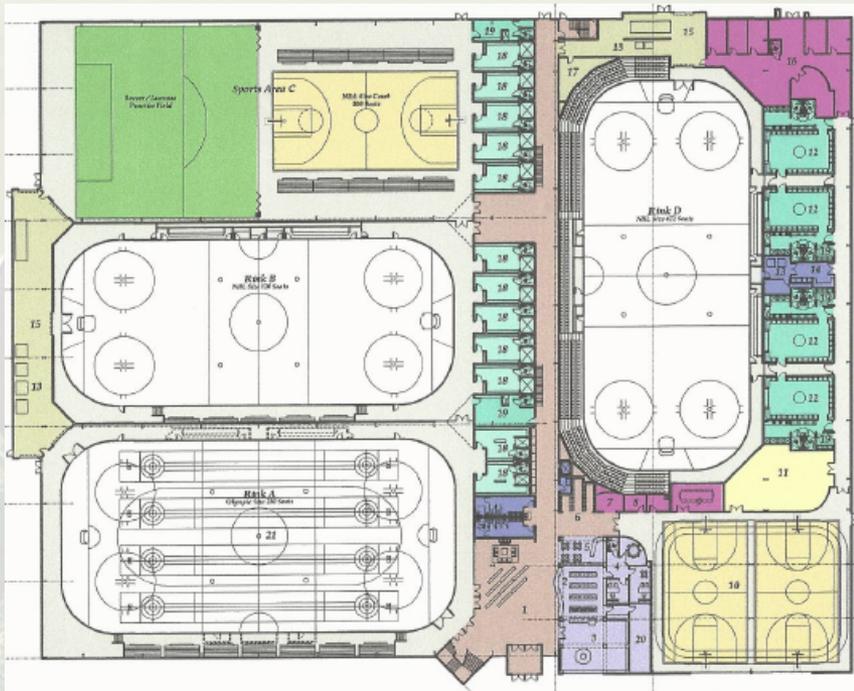
Potential Future Sports Tourism Inventory

- Wiregrass Sports Complex



Potential Future Sports Tourism Inventory

- Cypress Creek Ice Sports Complex



COMMUNITY ENGAGEMENT

THIS SECTION PROVIDES AN OVERVIEW OF THE RESULTS OF SFA|SFM'S STAKEHOLDER INTERVIEWS AND PUBLIC PARTICIPATION SURVEY



Key Stakeholders

- SFA|SFM conducted 31 key stakeholder meetings in one-on-one and small group sessions, including representation from:
 - County Commission
 - County Tourism
 - County Parks & Rec.
 - County Administration
 - County Planning
 - County Development
 - County Legal
 - City Chambers
 - Lodging
 - Leagues
 - Events
 - Citizens' Interests



Stakeholder Insights

- Opportunities for improvement revolve around:
 - Affordability
 - Alternative/non-traditional sports activities
 - Location/accessibility
 - Unique geographic features
- Challenges revolve around:
 - Lack of brand and market position/awareness
 - Lack of cohesion across the County
 - Lack of control over existing sports inventory
 - Lack of inventory/infrastructure to host events



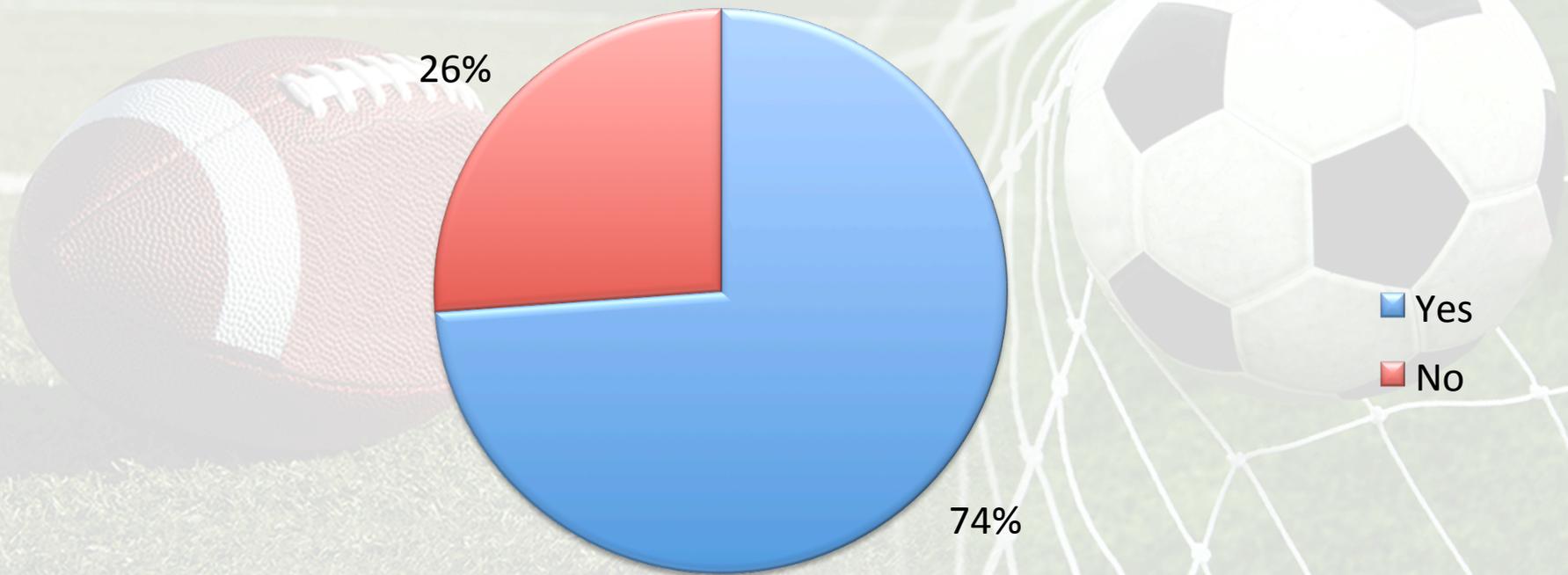
Public Participation Survey

- SFA | SFM and Pasco County developed a public survey to determine:
 - Level of support for sports tourism program development
 - Level of support for new sports facilities
 - Participation in youth and adult travel sports
 - Facility usage within Pasco County
 - Facility usage outside of Pasco County
- 820 Pasco County residents participated in the survey



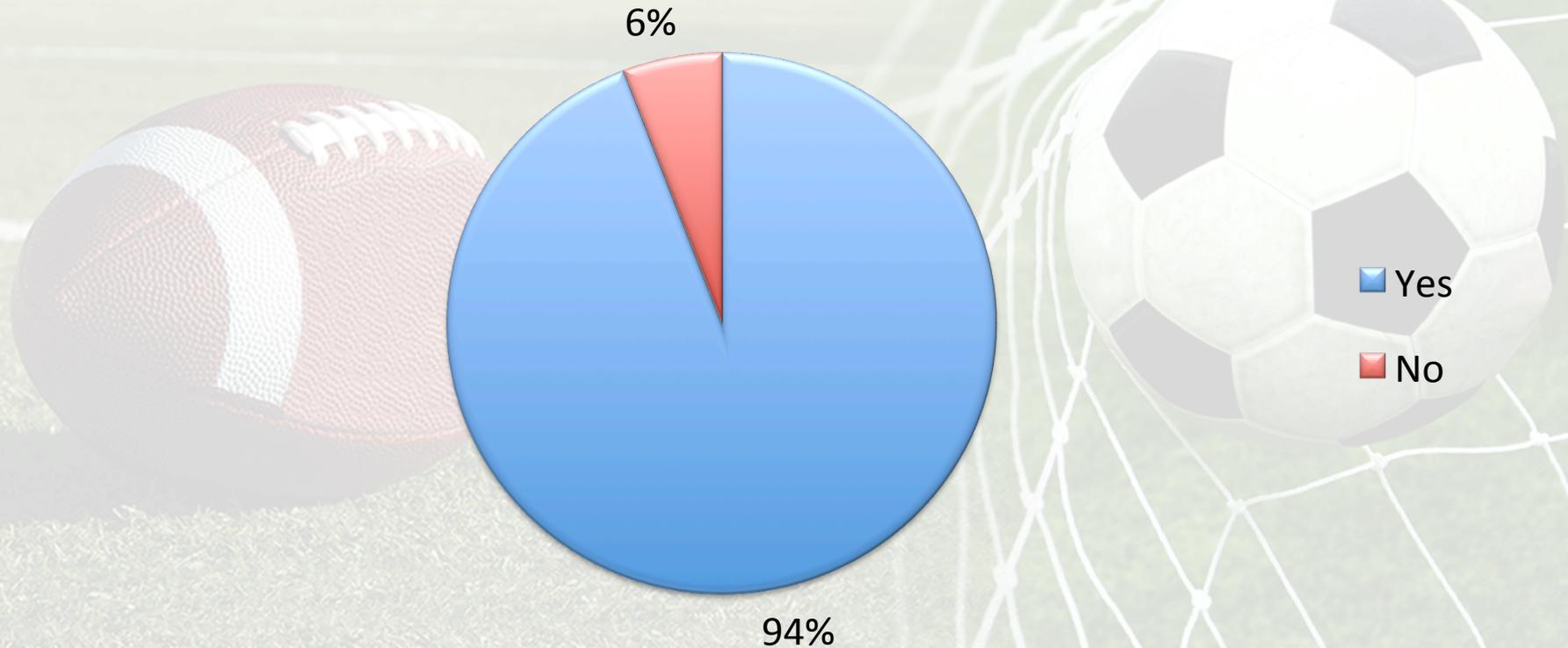
Public Participation Survey Highlights

Support for Sports Tourism Program Development



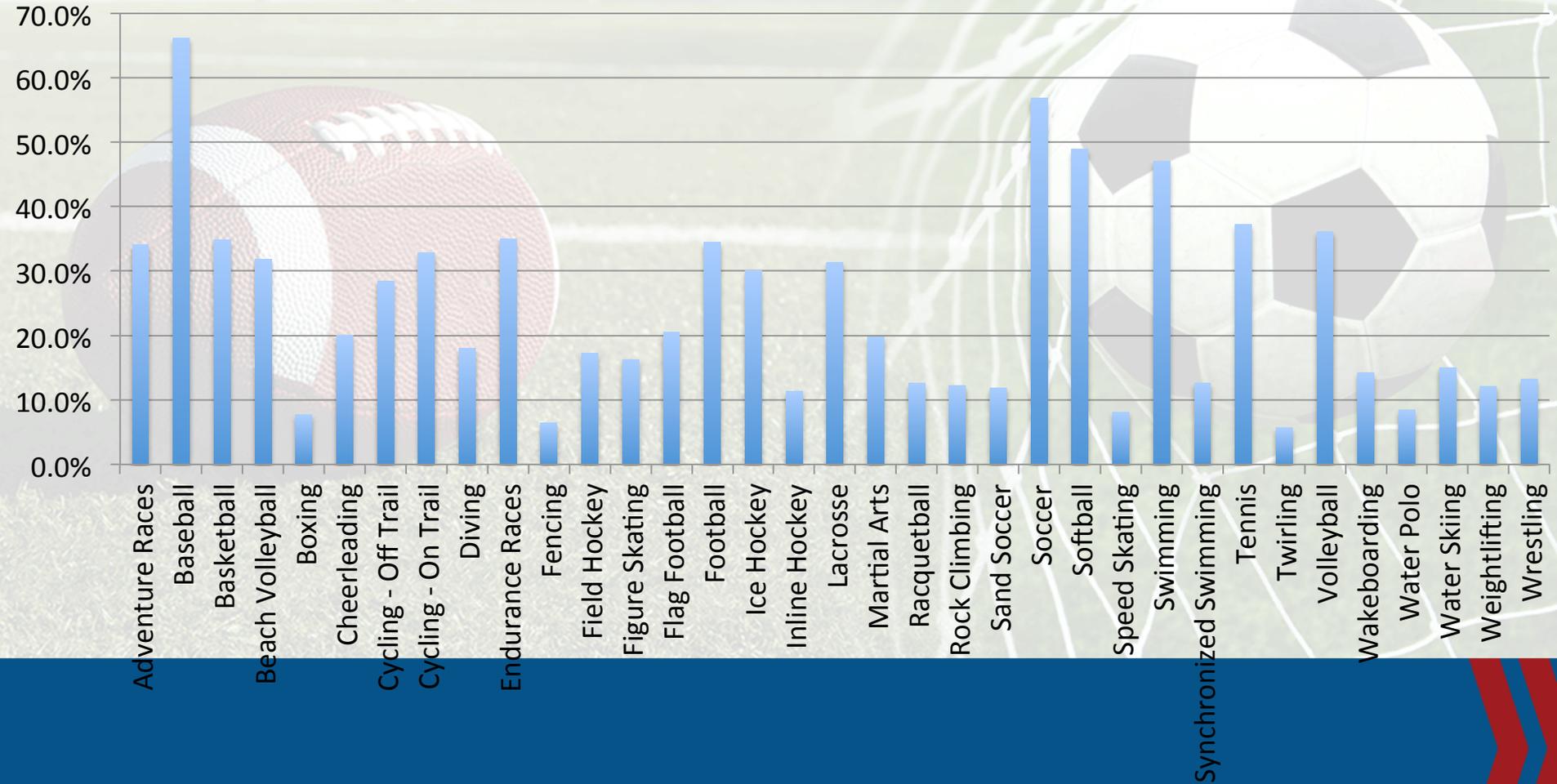
Public Participation Survey Highlights

Support for Development of New Facilities



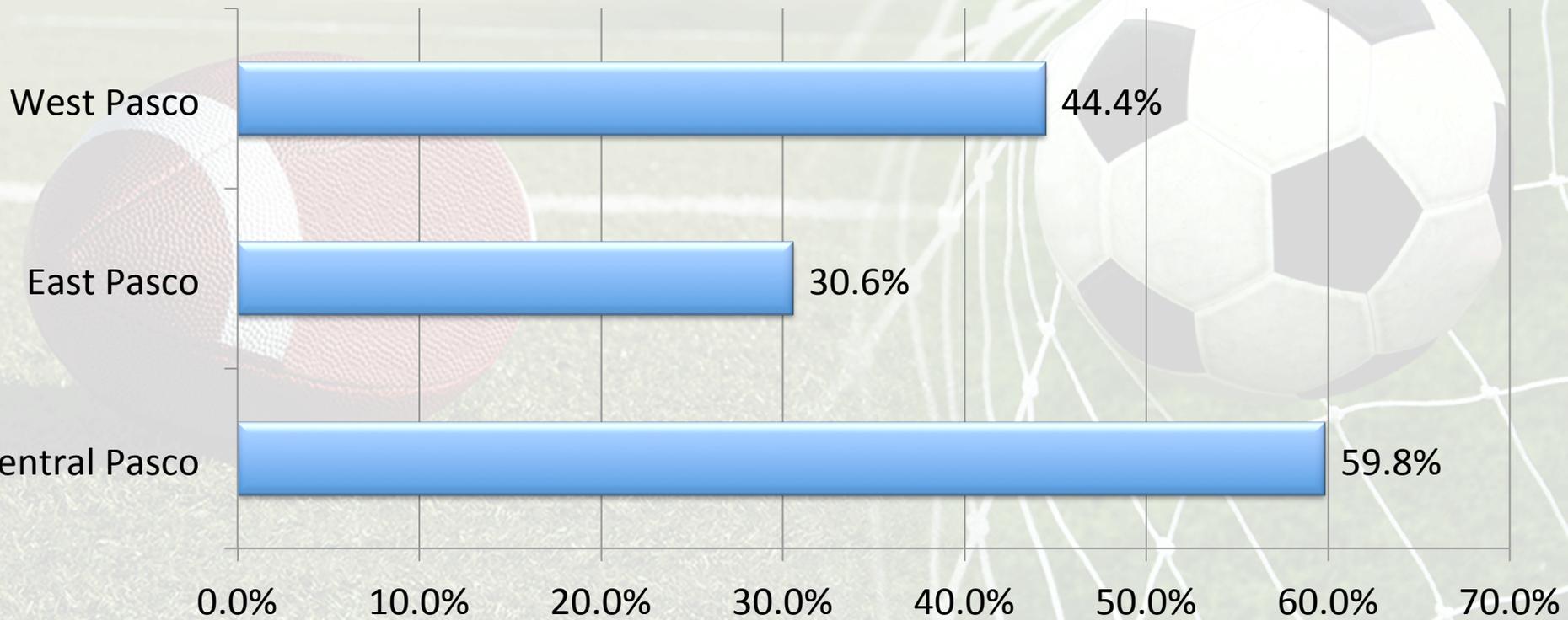
Public Participation Survey Highlights

Support by Type of New Facility



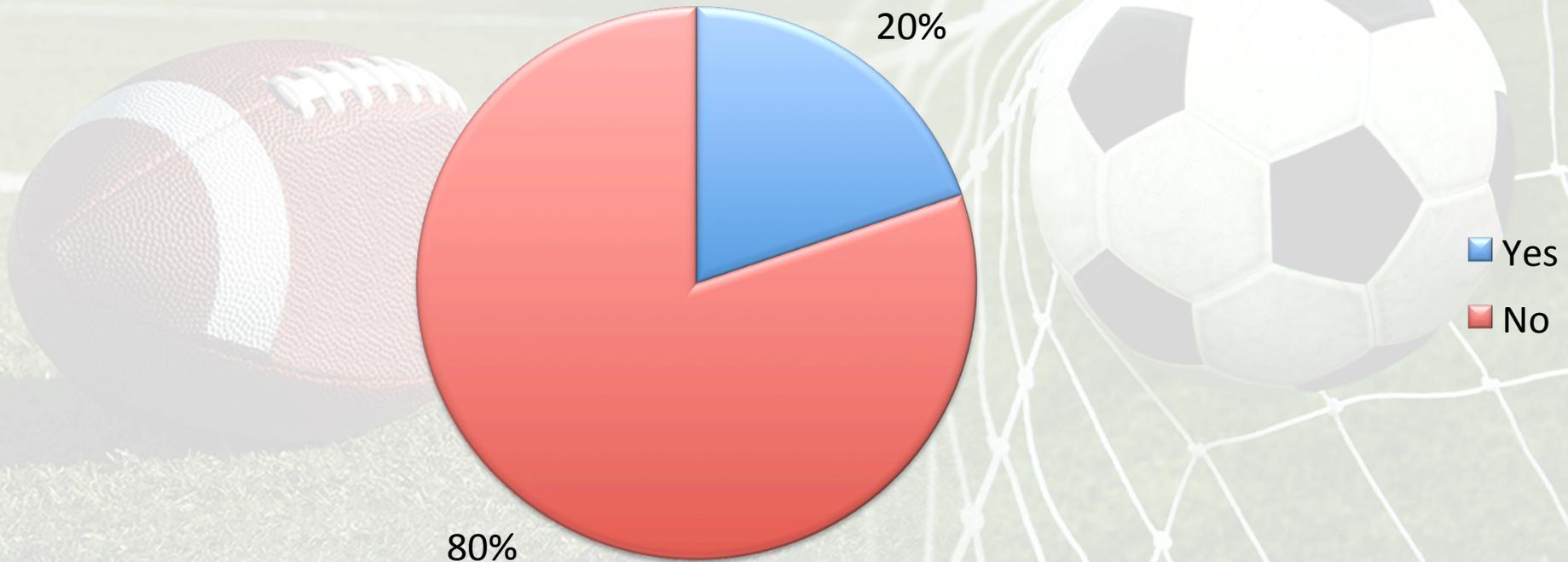
Public Participation Survey Highlights

Location of New Facility



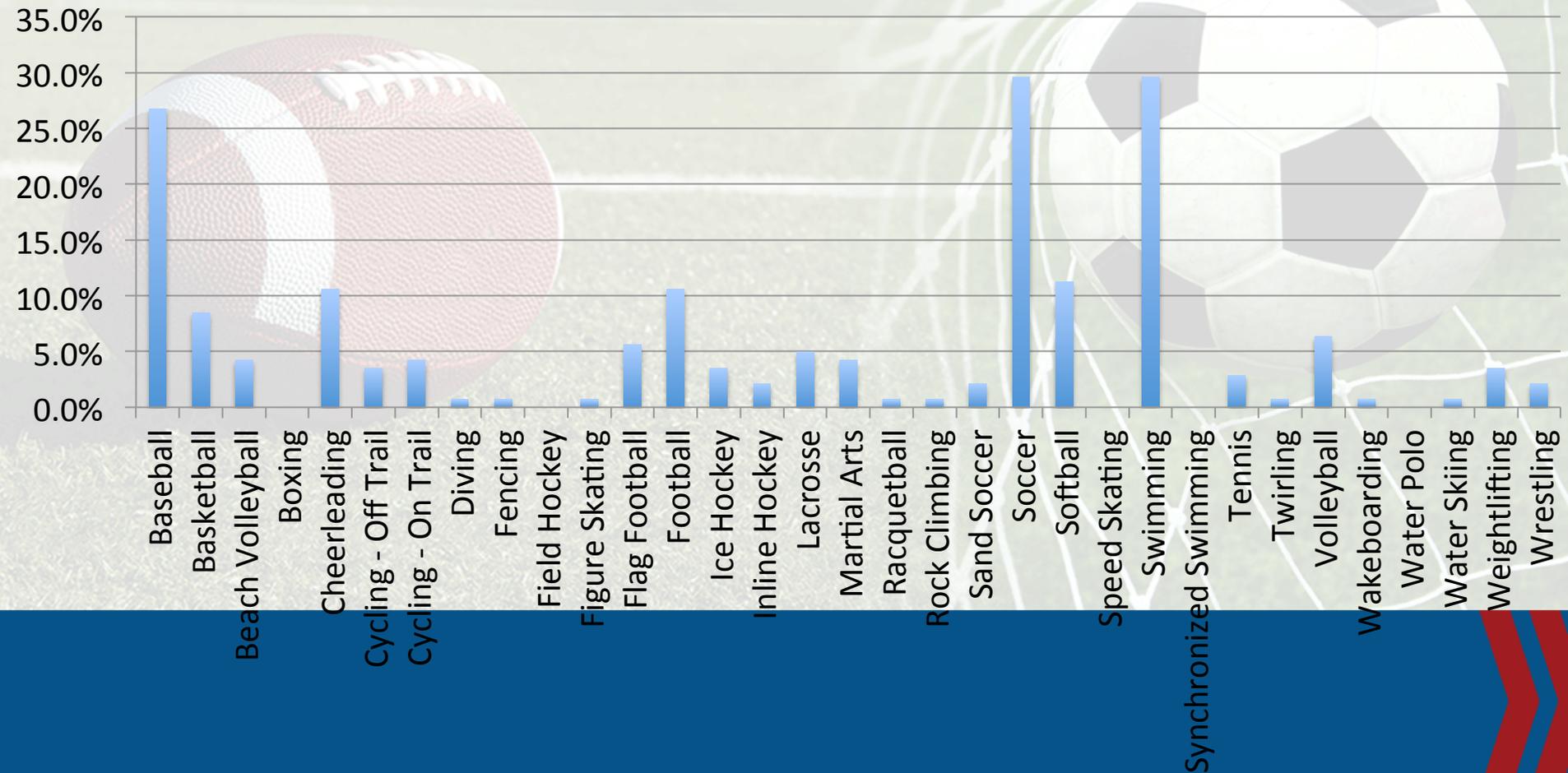
Public Participation Survey Highlights

Involvement in Travel Youth Sports



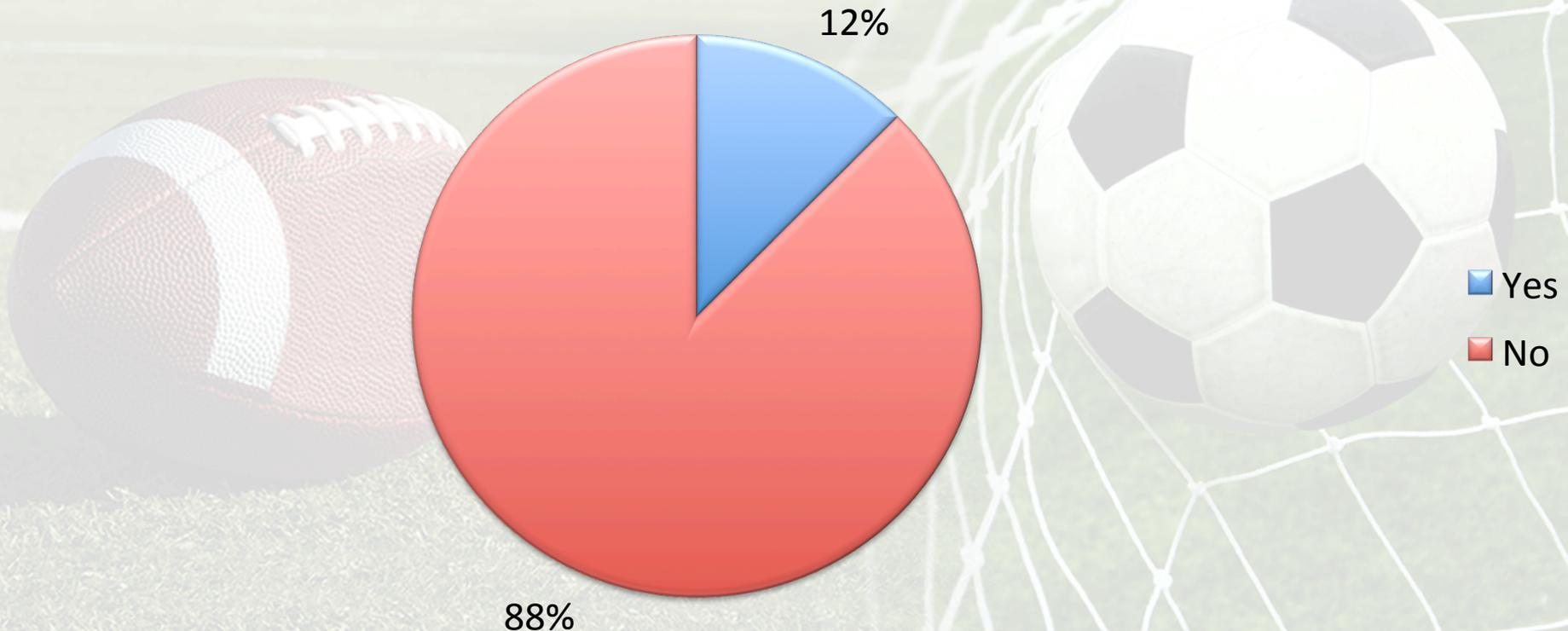
Public Participation Survey Highlights

Youth Travel Sports Participation by Sport



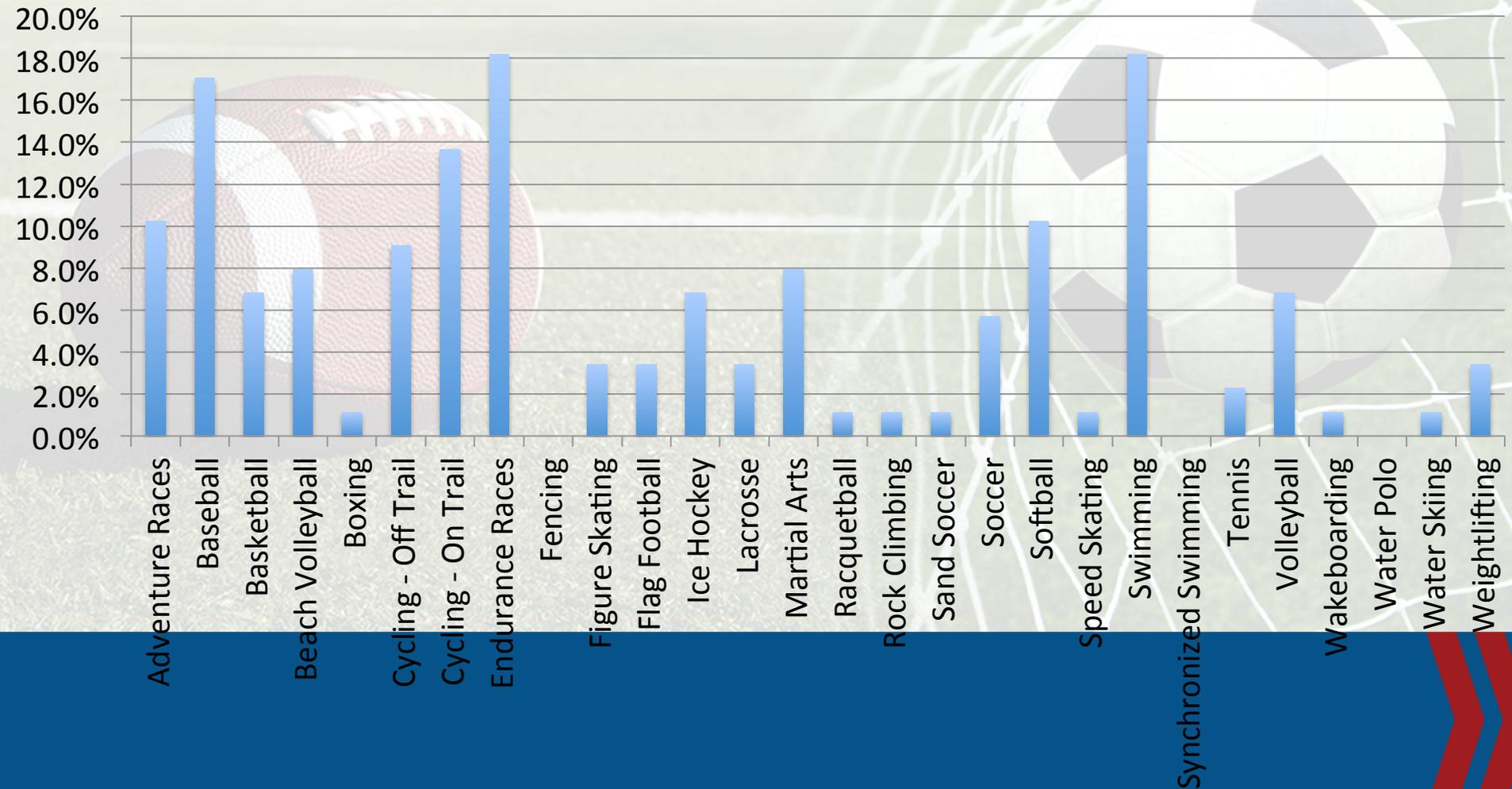
Public Participation Survey Highlights

Involvement in Travel Adult Sports



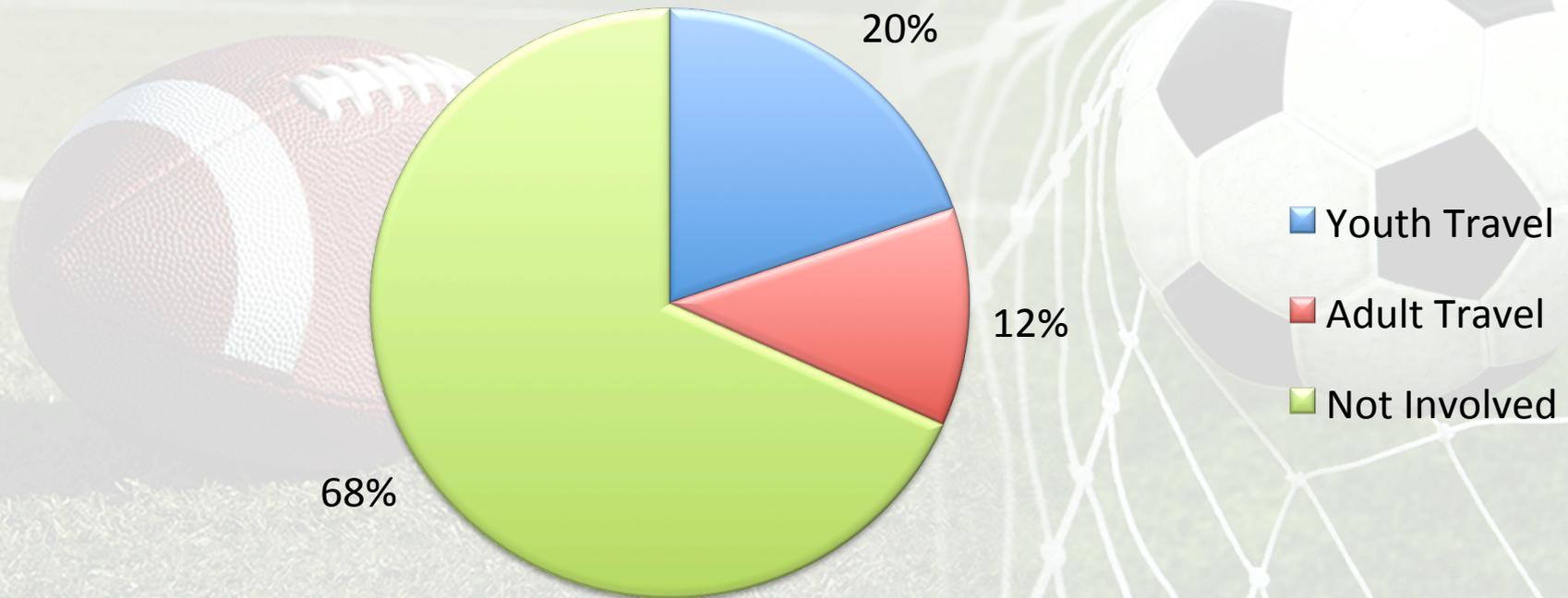
Public Participation Survey Highlights

Adult Travel Sports Participation by Sport



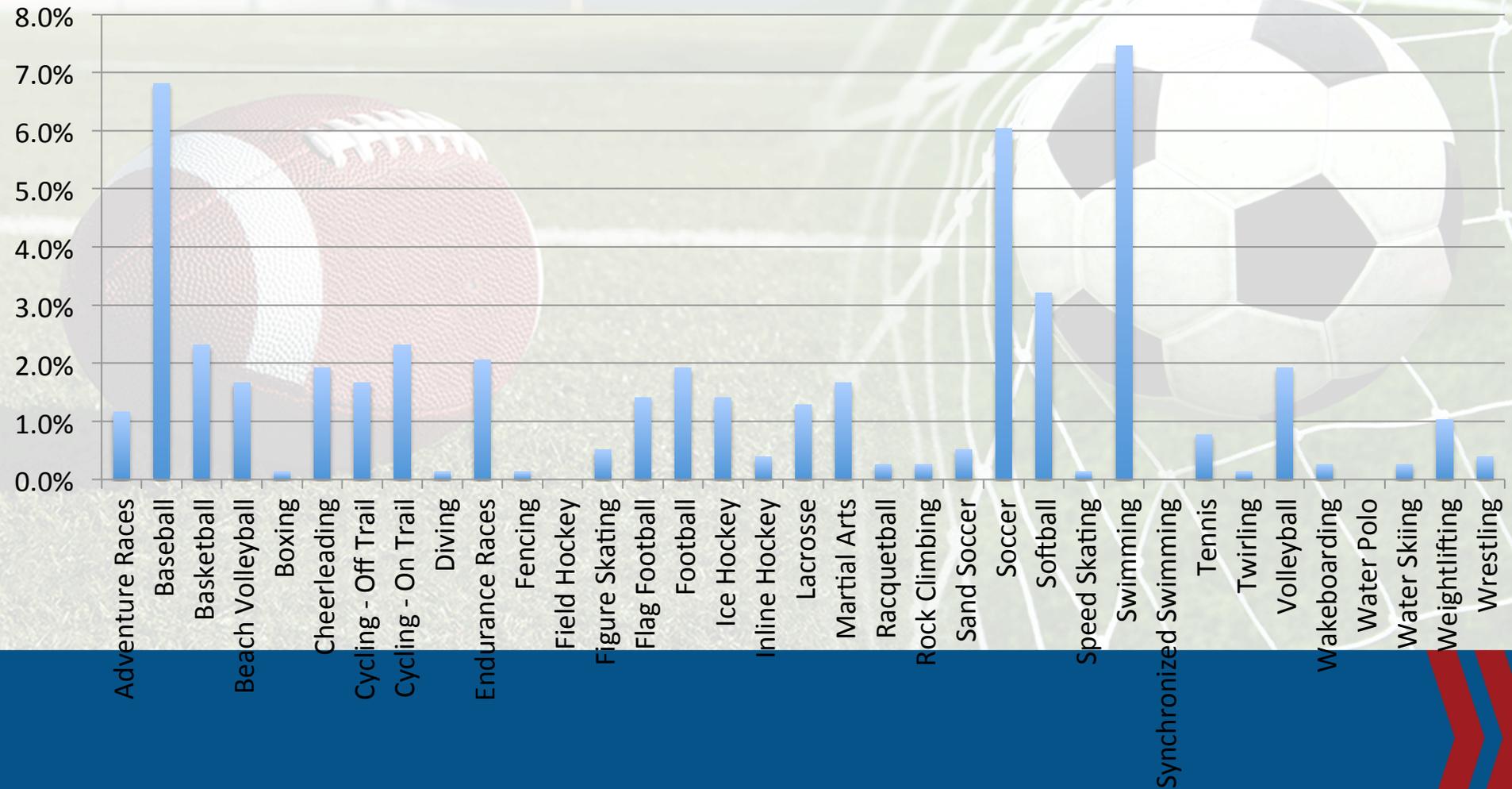
Public Participation Survey Highlights

Total Sports Travel Participation



Public Participation Survey Highlights

Total Travel Sports Participation by Sport



Public Participation Comment Highlights

- Reasons for supporting sports tourism development:
 - Sports as a tourism driver
 - Sports as a healthy living and social development tool
 - Sports as an economic development and business catalyst
 - Facilities as a job creation opportunity



Public Participation Comment Highlights

- Reasons for not supporting sports tourism development:
 - Concerns about increased traffic
 - Concerns about funding
 - Lack of infrastructure to support tourism
 - Sports as a lower priority than road improvement, education, attracting business, and other government services
 - Sports as a lower priority than the arts



SUCCESS FACTORS AND MARKET INSIGHTS

THIS SECTION PROVIDES AN OVERVIEW OF FACTORS THAT CONTRIBUTE TO A SUCCESSFUL SPORTS TOURISM DESTINATION AND PROVIDES INSIGHTS RELATED TO PASCO COUNTY'S CURRENT POSITION RELATED TO EACH OF THOSE FACTORS



According to the National Association of Sports Commissions (NASC), sports events are driven by:

1. Quality facilities
2. Accessibility
3. Lodging
4. Brand of the destination

SFA | SFM has identified additional factors which impact the likelihood of success for sports tourism destinations. These include:

5. Political will and prioritization of sports tourism among economic development initiatives
6. Incentives to support venues and events
7. Presence and funding of a Sports Commission



1. Quality Facilities

- Pasco County does not currently have high-quality, event-ready facilities dedicated for traditional sports tourism events
- SunWest, Wiregrass Sports Complex, and Cypress Creek Ice Sports Complex would all create high-quality sports tourism facilities
- Given the aforementioned potential facilities, multipurpose fields could be the focus of future new sports tourism facilities in Pasco County
- Additionally, Pasco County has unique geography, existing open spaces, and access to water, making eco-tourism and non-traditional sports tourism an immediate opportunity



Quality Facilities

Multipurpose Field Competition

Facility	Location	Fields
Big Sun Soccer Complex	Ocala, FL	9 fields
Davis Park Field	Ponte Vedra Beach, FL	8 fields
Eagle Harbor Soccer Complex	Orange Park, FL	9 fields
Ed Radice Sports Complex	Tampa, FL	10 fields
ESPN Wide World of Sports Complex	Orlando, FL	11 fields
Indian Trails Sports Complex	Palm Coast, FL	8 fields
JC Handley Sports Complex	Brandon, FL	10 fields
Keith Waller Fields	Dover, FL	7 fields
McChesney Park	Port St. Lucie, FL	6 fields
Meadows Soccer Complex	Tallahassee, FL	10 fields
Mitchell Ellington Park	Merritt Island, FL	8 fields
North Collier Regional Park	Naples, FL	8 fields
Northwest Recreational Complex	Apopka, FL	14 fields



Quality Facilities

Multipurpose Field Competition

Facility	Location	Fields
Ormond Beach Soccer Club	Ormond Beach, FL	10 fields
Patton Park	Jacksonville, FL	15 fields
Pine Island Park	Plantation, FL	7 fields
Pinellas Park Soccer Complex	Pinellas Park, FL	7 fields
Premier Sports Campus	Lakewood Ranch, FL	28 fields
Seminole Soccer Complex	Sanford, FL	11 fields
South Summerfield Soccer Park	Riverview, FL	7 fields
Sylvan Lake Soccer Complex	Sanford, FL	6 fields
Wellington Village Park	Wellington, FL	19 fields
Weston Regional Park	Weston, FL	8 fields



2. Accessibility

- Accessibility is both a strength and a challenge for Pasco County
 - Strength: Access along the I-75 corridor creates excellent access to Central Pasco County
 - The Shops at Wiregrass have demonstrated the advantage of this location
 - Challenge: The most accessible portions of Pasco County border Hillsborough County
 - For events at the most accessible locations, a large percentage of visitors will lodge and spend in Hillsborough County
 - Locations that do not border Hillsborough are less accessible and do not meet sports tourism destination requirements



3. Lodging

- Lodging requirements
 - National/brand-name limited-service hotels
 - Rates ranging from \$55-\$109 per night
 - Within 15 minutes of facility
 - Near quality dining and entertainment

- Lodging Inventory
 - Pasco County has limited inventory
 - The majority of properties do not meet the requirements
 - Those that do have limited vacancy on would-be tournament weekends

County	Hotel Rooms
Osceola County, FL	19,201
Pinellas County, FL	18,891
Polk County, FL	7,103
Marion County, FL	4,090
Pasco County, FL	2,962
Columbia County, FL	1,837
Charlotte County, FL	1,353
Martin County, FL	1,282
Flagler County, FL	1,213
Citrus County, FL	1,173
Hernando County, FL	944



4. Brand of the Destination

- Within the national competitive marketplace for sports tourism, successful destinations have prioritized sports tourism as an economic development tool
 - In most cases, these destinations have invested heavily to develop destination brand awareness
 - Examples include:
 - Myrtle Beach, SC
 - Gatlinburg, TN
 - Orlando, FL
 - Most successful sports tourism markets have foundational tourist attractions and supporting industries that create a reputation, ability, and capacity to grow successful sports tourism programs



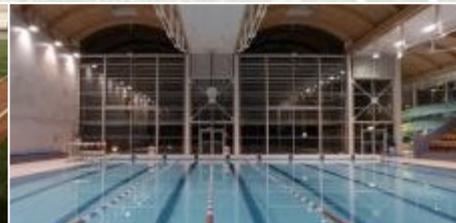
Brand of the Destination

- SFA|SFM found that Pasco is lacking a clearly articulated brand message
- Because of that, it is difficult for the County to express its value propositions in terms that do not require a comparison to other locations
- Unique geographical assets could be featured within the Pasco County brand
 - Eco-tourism locations and SunWest could be a vital component in this effort



5. Political Will and Prioritization

- Political will and the prioritization of sports tourism as a core economic development strategy is a key factor in the success of any sports tourism development effort
- Successful sports tourism destinations unify efforts among:
 - Elected officials
 - Tourism and economic development professionals
 - CVBs and sports commissions
 - Facility managers and staff/volunteers
 - Event organizers and national governing bodies
 - Local teams and leagues
 - Collegiate and professional organizations
 - Supporting industry professionals



Political Will and Prioritization

- SFA|SFM 's interviews and meetings found that County staff and supporting industry professionals have varying degrees of commitment to sports tourism
- Creating clear, measurable, and realistic goals for sports tourism could help to enhance political will and create a prioritization effort around sports tourism
- To validate the opportunity, it should be considered that:
 - The sports travel sector was the only segment within the tourism industry to grow every quarter throughout the recession
 - 27% of all trips taken inside the U.S. in 2012 were directly related to an organized sporting event



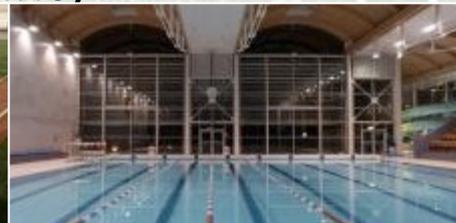
6. Incentives to Support Events and Venues

- Successful sports tourism destinations have a dedicated budget to support events and venues that create a positive economic impact
 - The budget is used to provide bid fees, facility fees, marketing support, etc.
- Highly successful sports tourism destinations use calculators that determine the value of events and venues based on history, proven data, and other factors deemed important by the destination
- Pasco County has a history of supporting events and venues, but SFA|SFM 's review of previous incentives has revealed that a standard method of valuing events should be created



7. Presence and Funding of a Sports Commission

- Successful sports tourism destinations have a dedicated Sports Commission to focus on attracting, hosting, and retaining events
- The Sports Commission is responsible for managing the incentives budget
- Depending on the market, Sports Commissions are full departments, individual professionals, or outsourced offices
- Pasco County has a unique blend of assets that can support traditional sports events as well as road races, endurance events, paddle board, kayak, canoe, fishing, equestrian, and other sporting events
- Because of this wide array of opportunities, an experienced, properly funded Sports Commission would be required to optimize the opportunity for Pasco County



OPTIMIZATION STRATEGY AND RECOMMENDATIONS

THIS SECTION PROVIDES A SET STRATEGIES AND RECOMMENDATIONS FOR PASCO COUNTY TO IMPLEMENT IN ORDER TO OPTIMIZE THE OPPORTUNITY FOR SPORTS TOURISM



Pasco County Sports Tourism Strategy

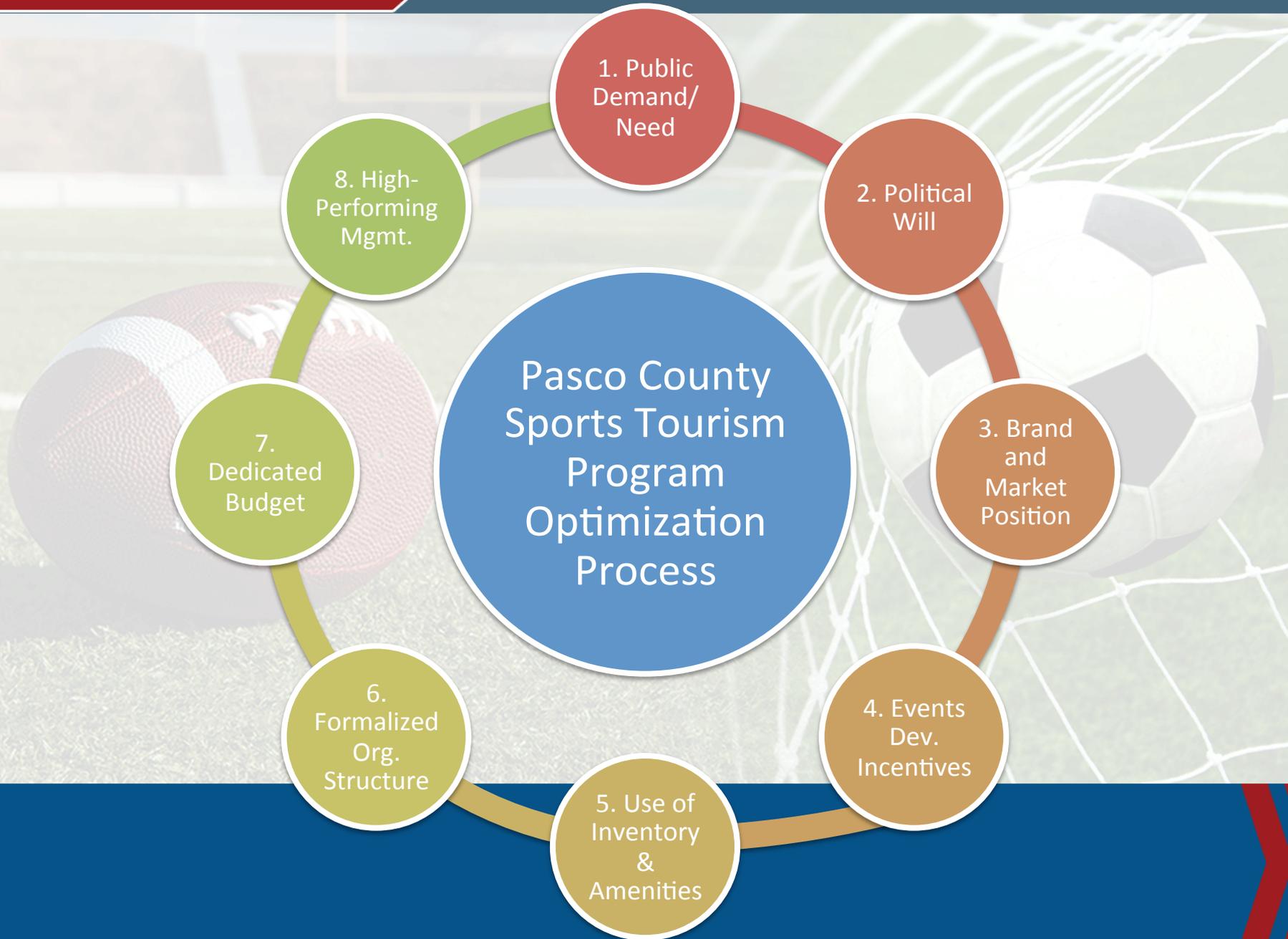
- In order to assist Pasco County in creating a successful sports tourism program, SFA|SFM has developed an optimization strategy that is tailored to the unique needs and opportunities within the County
- Throughout the course of this study, SFA|SFM has identified the need to begin the optimization process by addressing foundational elements of a successful sports tourism program
- SFA|SFM recommends that this foundational growth remains Pasco County's central focus over the next 2-3 years
- Over that period, Pasco County should utilize existing facilities and existing eco-tourism assets to focus on regional events



Pasco County Sports Tourism Strategy

- Pasco County should target events that utilize existing County infrastructure and make a measurable impact on the use of County hotels, restaurants, entertainment, and retail businesses
 - This will set the stage for future development in those industries
- By building the foundation and expanding its reputation for hosting great regional events, Pasco County can capitalize on the tremendous regional and national opportunities created by SunWest, Wiregrass Sports Complex, and Cypress Creek Ice Sports Complex as they open and grow
- SFA|SFM has developed the following model to lead Pasco County through the sports tourism program development process





1. Public Demand and Need

- Based on SFA|SFM's findings, there is the potential to develop a successful sports tourism program in Pasco County
- There is both demand and need for sports assets and activities that can create positive economic impact for the County
- Before attempting to meet that need through the development of new assets, Pasco County should focus on building its ability to host regional sports tourism events that use existing infrastructure
- Pasco County should create a reporting structure that accurately analyzes the impact from sports tourism events and activities
- Pasco County should produce an annual report to provide data that garners public support and identifies additional needs



2. Political Will

- As revealed in the market insights section of this report, there is a current lack of political will and prioritization of sports tourism as an economic development tool for Pasco County
- Before a successful sports tourism program can be implemented, Pasco County must agree upon a clear strategy and path forward related to the future of the County's sports tourism program
- SFA|SFM recommends that commitment to the following six factors serve as the baseline for "achieving" political will:

3. Brand and Market Position

4. Events Dev. Incentives

5. Use of Inventory & Amenities

6. Formalized Org. Structure

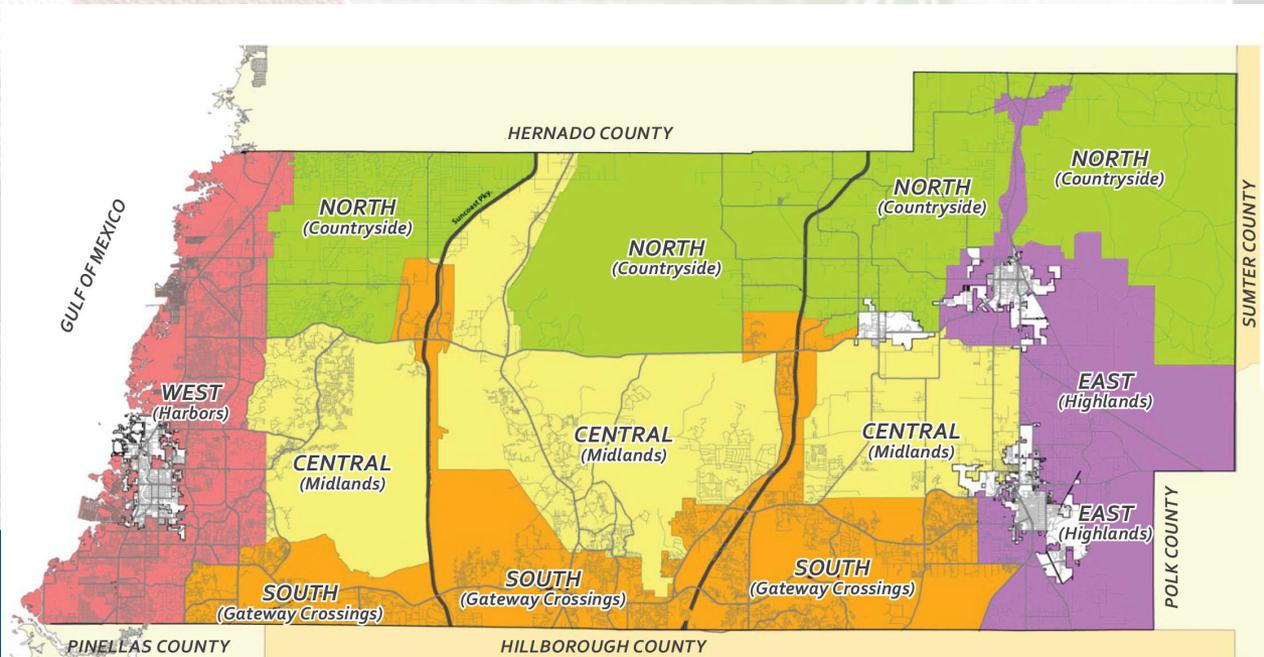
7. Dedicated Budget

8. High-Performing Mgmt.



3. Brand and Market Position

- SFA|SFM recognizes Pasco County's efforts to brand itself as "a collection of great places"
- SFA|SFM believes this strategy can be successful for local brand recognition, but recommends a measured approach to utilizing this brand for sports tourism marketing purposes



PASCO COUNTY MARKET AREAS

3. Brand and Market Position

- In order to be a “great place” for sports tourism, locations must have:
 - Quality competitive facilities
 - Quality lodging with a sufficient number of rooms within 15 minutes with rates ranging from \$55-\$109 per night
 - Quality dining options for families and teams within 15 minutes
 - Quality entertainment and retail options within 15 minutes
- Locations that meet those standards should be the only host sites for sports tourism activities
- In order to develop a true regional and national brand for sports tourism, Pasco County should engage a branding firm to help develop a brand message and campaign for attracting non-local participants



4. Event Development Incentives

- An annual line item for incentives should be established, along with a targeted number of annual room nights from sports tourism
- The County should implement a tool that calculates the value of events based on a number of factors, including but not limited to:
 - In-County room nights
 - County incremental tax revenue
 - Facility revenue
 - Event date
 - Event location
 - Event size
 - Participant characteristics
 - Future growth potential
 - Length of contract
- Pasco County should target events that use existing infrastructure within the County



5.

Use of Inventory and County Amenities

- In order to develop its ability to host and grow events at existing facilities, Pasco County must amend its agreements with local user groups to maintain control over County-owned sports assets
- SFA|SFM has contributed to the development of a contractual structure whereby assets can be reserved for sports tourism uses a specified number of times annually with an agreed-upon advance notice
- In order to create a mutually beneficial relationship, SFA|SFM has outlined the following model to demonstrate the ideal relationship between facilities, events, and local users



5.

Use of Inventory and County Amenities



- Facilities host local organizations and sports tourism events
- Local organizations take ownership of protecting quality facilities and support events through flexible scheduling, registration, and volunteerism
- Sports tourism events use facilities responsibly to generate economic impact and provide local organizations opportunities to compete and generate revenue



5.

Use of Inventory and Private Amenities

- As private owners/operators are engaged at new facilities like SunWest, Wiregrass Sports Complex, and Cypress Creek Ice Sports Complex, the County must implement and support a structure in which:
 - Events are scheduled, planned, and tracked, with County participation
 - Visitors play, stay, eat, and recreate in Pasco County
 - Visitors are engaged in Pasco County activities
 - Visitors leave with an instant perception of Pasco County's brand as "a collection of great places"
 - Visitors are invited back to Pasco County



6.

Formalized Organizational Structure

- In order to fully develop a sports tourism program, SFA|SFM recommends creating or outsourcing a formal Sports Commission
- The Sports Commission would be charged with:
 - Event creation and management
 - Fiscal management
 - Marketing and public relations
 - Facility scheduling
- Based on current opportunities and potential developments, the Sports Commission should be sized to the current opportunity and poised to grow rapidly as new venues open



7.

Dedicated Budget

- To develop a successful sports tourism program, Pasco County must create a budget covering:
 - Brand development
 - Online presence
 - Print materials
 - Public relations
 - Advertising
 - Tradeshows
 - Out of market visits
 - Fam. visits
 - Event hosting
 - Event development
- The Sports Commission should be responsible for managing this budget, as well as the event incentive budget and process



8.

High-Performing Management

- In order to develop and grow a successful sports tourism program, Pasco County must ensure facilities are operated by on-site management with a proven ability to:
 - Schedule and host events
 - Generate revenue
 - Control expenses
 - Train and retain quality staff and volunteers
 - Maintain the facility
 - Drive and track economic impact
 - Create a great experience for users and guests



SUMMARY AND NEXT STEPS

THIS SECTION PROVIDES A SUMMARY OF SFA|SFM'S RECOMMENDATIONS AND THE STEPS NECESSARY TO DEVELOP A SUCCESSFUL SPORTS TOURISM PROGRAM



SFA | SFM's study has identified the opportunity for Pasco County to optimize its current sports tourism program. To do so, SFA | SFM recommends taking a phased approach to development, which would feature:

- Focusing sports tourism efforts on events that use existing facilities, assets, and infrastructure in the short term
- Maximizing the opportunities brought by SunWest, Wiregrass Sports Complex, and Cypress Creek Ice Sports Complex as they open and grow
- Developing additional sports tourism assets once a successful sports tourism program has been established



In order to create a successful sports tourism program, SFA | SFM has outlined the following steps:

1. Create a reporting structure for current and future impacts from sports tourism
2. Establish political congruency around a sports tourism program
3. Develop a brand message and campaign around Pasco County sports tourism
4. Create a budget for incentives to allow for the support of sports tourism events
5. Create a tool to accurately value sports tourism events, focusing on events that use existing infrastructure



6. Adjust the current facilities usage agreements to ensure that qualified events can be brought to facilities in "great places" for sports tourism
7. Create a program to support private owners/operators in contributing to sports tourism
8. Create or outsource a properly funded Sports Commission
9. Establish a dedicated marketing and event development budget for the Sports Commission to manage
10. Engage high-performing managers at facilities to create a great experience for users and guests



Following the delivery of this report, SFA|SFM representatives will engage in dialogue, questions and answers, and final updates to this report. This will result in an implementation plan that will then be overseen by County officials and SFA|SFM.

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