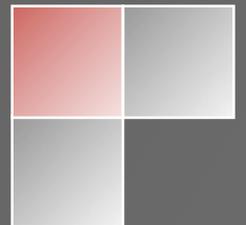


June 2015

**Summary &
Recommendations
Report**
*Pasco County
Sports Tourism
Optimization Plan*
(Pasco County, Florida)

Prepared for:
Pasco County Government

Prepared by:
Sports Facilities Advisory, LLC



INTRODUCTION

In July 2014, Sports Facilities Advisory (SFA) was contracted by Pasco County to complete a sports asset and sports tourism strategic development study. The goal for the project was to provide Pasco County with specific recommendations and strategic initiatives to enhance sports tourism and economic development/jobs creation through sports tourism related initiatives. This document, which has been created as a summary of the report delivered to Pasco County in 2014, provides:

1. An overview of the historic research and analysis process
2. An overview of the regional market and sports tourism industry
3. A summary of existing sports tourism assets and supporting amenities
4. Market insights grounded in SFA's planning, opening, and operating experience
5. A recommended optimization strategy for Pasco County
6. The next steps for the development of sports tourism in Pasco County

About Sports Facilities Advisory and Sports Facilities Management

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

Since opening in 2003, the firms have served a portfolio totaling more than \$4.5 billion in planned and operational public and private sport and recreation complexes. The firms are most well known for assisting sports tourism destinations, private developers, parks and recreation departments, national/state/local government entities, universities and educational institutions, and architecture and engineering firms. SFA|SFM provide strategic planning, feasibility studies, economic impact studies, funding support, management systems, and optimization for new and existing sports and recreation complexes across the U.S. and worldwide.

MARKET ANALYSIS AND MARKET INSIGHTS

Before developing recommendations and strategic initiatives for Pasco County, SFA completed an extensive research and data analysis process, including:

1. Local and regional demographic and socioeconomic analysis
2. Youth and amateur sports tourism industry analysis
3. Existing Pasco County sports asset and eco-tourism asset tours
4. Existing Pasco County facilities analysis
5. Future Pasco County Facilities review
6. Regional facilities /competition analysis
7. Existing regional events analysis
8. Pasco County support services review
9. Key stakeholder interviews
10. Public survey administration and response analysis

Overview of Market Analysis

Local and Regional Demographic and Socioeconomic Analysis

SFA analyzed key demographic and socioeconomic factors for predicting support, participation, and purchasing of youth and amateur sports products, services, services, and events. While demographics and socioeconomics are one small portion of SFA’s proprietary analytical process, they are an important initial indicator. The charts below summarize the factors analyzed.

	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

	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

As demonstrated, a total of 12 regional counties were studied, and Pasco County ranked in the middle of each of the key factors as a comparative measure, suggesting that the County's population base can support a sports tourism program but does not have general population-based advantages relative to nearby competitors.

Youth and Amateur Sports Tourism Industry Analysis

In order to determine if the sports tourism industry is a potentially sound investment for Pasco County, SFA analyzed the industry to determine recent and future trends as well as the potential for Pasco County to compete in the industry based on its size and market position. Below are key statistics and insights related to the industry.

- In the United States, sports tourism is a \$200 billion per year travel industry.
- The youth and amateur segment of sports tourism is a \$9 billion industry nationwide that has experienced 20% growth over the last 3 years.
- Last year, 28.5 million visitors were hosted through youth and amateur sports events.
- 50% of sports commissions are located in cities with a population under 250,000.
- Sports tourism is the only segment of the tourism industry that did not decline in a single quarter during the recession.
- Mid-sized markets and vacation destinations dominate the youth and amateur sports tourism industry. This is because large markets are sometimes constrained by space and competing interests, while small, isolated markets are sometimes constrained by infrastructure.
- Successful sports tourism destinations, regardless of the size of the market, commit to high quality, expertly maintained facilities that professionally managed with operational excellence as a top priority.

Based on the information above, SFA believes that the youth and amateur sports tourism industry is a successful, growing, and reliable segment of the larger tourism industry and is a segment in which Pasco County has an opportunity to enter and be competitive.

Existing Pasco County Sports Asset and Eco-Tourism Asset Tours

SFA representatives went on a County-wide driving tour of traditional sports and recreation facilities and went on a fly-over to review the opportunities and amenities for eco-tourism.

Existing Pasco County Facilities Analysis

Based on the tours and a further analysis of the existing inventory, SFA determined that two existing facilities could support field-based sports tourism events. Those facilities are Wesley Chapel District Park and Land O’ Lakes Rec Center, each of which are in bold in the following chart of existing field facilities analyzed.

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

Additionally, SFA determined that Pasco County has a unique blend of physical and geographical assets that can support outdoor sports and eco-tourism events such as road races, endurance events, paddle board, kayak, canoe, fishing, equestrian, and other sporting events.

Based on the existing inventory, SFA determined that there is no opportunity for Pasco County to develop competitive, reliable sports tourism events in existing court-based facilities.

Future Pasco County Facilities Review

SFA reviewed plans studies related to three potential future sports tourism facilities, including:

- SunWest Park
- Wiregrass Sports Complex
- Cypress Creek Ice Sports Complex

Each of those facilities, if built, could contribute significantly to a sports tourism program in Pasco County.

Regional Facilities /Competition Analysis

SFA analyzed 60 regional field-based facilities that currently host sports tourism events and identified 23 facilities that would be in direct competition with Pasco County based on current County field-based facilities that could be used for sports tourism events. This level of competition points to the need for a well-managed, well-funded sports tourism initiative in order to compete in the region.

Existing Regional Events Analysis

SFA analyzed over 75 regional events that are currently being held in Florida. This is a small sampling of the events being held and the events that Pasco County could compete to host at high-quality tournament facilities. The size, participation, and growth of these events are all strong indicators of the industry.

Pasco County Support Services Review

In order to host successful sports tourism events, there must be a myriad of additional amenities to support the event and the non-local visitors being hosted. Most notably, successful sports tourism venues have fast and easy access to lodging, dining, shopping, and retail locations. The chart below shows Pasco County's hotel room inventory as a compared to 10 neighboring counties.

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

As demonstrated above, Pasco County has a limited number of hotel rooms relative to the large counties in the region, particularly given the size of Pasco County.

Key Stakeholder Interviews

SFA held 31 key stakeholder meetings and interviews to gauge support for a sports tourism initiative and to gain insight to the opportunities, challenges, and expected use of a sports tourism destination in Pasco County. Included in those meetings and interviews were representatives from County Commission, County Tourism, County Parks & Rec., County Administration, County Planning, County Development, County Legal, City Chambers, lodging, leagues, event rights holders, and citizens' interest groups. Throughout the stakeholder sessions, several messages were repeated.

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 County control over existing sports inventory
- Lack of inventory/infrastructure to host events

Public Survey Administration and Response Analysis

SFA conducted a public participation survey to gauge support, participation, and current utilization within and outside of Pasco County. In total, 820 Pasco County residents responded to the survey. The full survey results have been delivered as an associated document. Some of the key results include:

- 74% of respondents support the development of a sports tourism program
- 94% of respondents support the development of new facilities
- Baseball (66.1%) and soccer (56.8%) facilities had the most supporters for new facilities
- 32% of all respondents reported they travel outside of Pasco County to participate in competitive sports events

Market Insights

SFA | SFM's experience in planning, opening, and operating sports tourism facilities across the country and internationally has revealed that successful sports tourism destinations exhibit most or all of the following success factors:

- High-quality competitive amenities
 - Premium playing surfaces
 - Inventory to support large events in one location
 - Attention to player and spectator comfort
 - Features that Add Reliability to Scheduled Events
- Access from large populations and/or major markets
- Proximity to quality, affordable lodging and restaurant options
- A reputation for hosting and creating great events
- Political will to develop and support sports tourism as a cornerstone of tourism and economic development initiatives
- Funding that allows for financial and operational incentives to support venues and events
- Presence of a well-managed, well-funded sports commission.

Based on the research and data analysis outlined on the preceding pages and in consideration of the success factors listed above, SFA has developed the following market insights for Pasco County:

1. Pasco County does not currently have the tournament ready, high-quality field-based facilities necessary to build a consistent sports tourism program. The three potential new facilities mentioned above would meet the facility requirements to be successful.
 - That said, Pasco County has the natural resources that could be used to accommodate non-traditional and eco-tourism events at unique geographical areas, existing open spaces, and access to water.
2. Major thoroughfares leading into Pasco County create access from all parts of the state of Florida, which is an advantage.
 - That said, the majority of highly accessible areas with the supporting amenities needed to host events border Hillsborough County, creating a risk for losing participants to a different tax area.
 - To be successful, Pasco County needs to develop a lodging and entertainment program that keeps non-local attendees in Pasco County.
3. Pasco County has limited hotel, restaurant, and retail properties near the existing field-based facilities that could host events. The hotel properties near large field facilities also have limited availability for most of the year, diminishing the opportunity to attract and retain events.

- To be successful, Pasco County needs to attract new hoteliers, restaurants, and retail properties to tournament-ready sites or build tournament-ready sites near existing supporting businesses.
- 4. Pasco County is lacking a clearly articulated brand that will resonate with event rights holders, players, coaches, and parents who may consider choosing Pasco County as a desirable place to play.
 - To be successful, Pasco County needs to clearly define its brand and invest in developing awareness of the brand.
- 5. Pasco County has varying degrees of commitment to sports tourism across the key stakeholders who could drive and support a sports tourism initiative.
 - To be successful, Pasco County needs to unify efforts across departments and stakeholders and needs to create clear, measurable goals for sports tourism.
- 6. Pasco County has a history of incentivizing and supporting great events, but does not have a reliable, standard method for valuing events.
 - To be successful, Pasco County to determine the incentive appropriate for each event based on history, proven data, economic impact, etc.
- 7. Pasco County does not have a true sports commission and has made limited staff and resource investment to the sports tourism initiative.
 - To be successful, Pasco County needs to develop a properly-funded sports commission with clear, measurable goals to achieve.

OPTIMIZATION STRATEGY AND RECOMMENDATIONS

In order to address the issues identified in the market analysis and insights, SFA created an 8-step sports tourism optimization strategy for Pasco County. Those steps are:

1. Develop Public Support Through Demonstration of 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 utilizes its existing infrastructure. Pasco County should create a reporting structure that accurately analyzes and assesses the impact from sports tourism events and activities held in the county. Pasco County should produce an annual report to provide data that garners public support and identifies additional needs.

2. Develop Political Will

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, and supporting industry professionals.

As stated previously, 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 definition, strategy, and path forward related to each of steps 3-8 below. Only once that path forward is uniformly supported should the County proceed with those steps.

3. Focus on a Clear Brand and Market Position

Pasco County's calls itself as "a collection of great places." While that may be a meaningful message to locals and neighbors who are interested in accessing multiple parts of the County, it does not resonate with potential visitors for sports tourism. In order to be perceived as 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

SFA recommends controlling the expectations and experience of sports tourism visitors by specifically marketing the locations that meet these standards as the host sites for sports tourism activities. That can be achieved by creating a message around the places to stay, places to eat, places to shop, and things to do within 15 minutes of the tournament or event site.

4. Formalize the Event Development Incentive Valuation Process

SFA recommends creating an annual line item for incentives 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

Events should be supported based on their value to Pasco County and as a corresponding percentage of the total goal to the total incentive budget.

5. Use Existing Inventory and Amenities to Start Building the Program

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 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.

An ideal relationship between facilities, events, and local organizations involves them working closely together to plan, organize and manage sports tourism events. Each of the three entities supports one another through a dynamic in which:

- Facilities host both local leagues/organizations as well as 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.

Inventory and Private Amenities

As private owners/operators are engaged at new facilities like Wiregrass Sports Complex and Cypress Creek Ice and Sports Complex, the County must implement and support a structure in which:

- Events are scheduled, planned, and tracked, with County participation
- Visitors are encouraged to 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. Formalize a Sports Tourism Organizational Structure

In order to fully develop a sports tourism program, SFA recommends creating or outsourcing a formal sports commission. The Pasco County 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. Approve a Dedicated Budget

Pasco County has significant opportunities to utilize existing infrastructure for road races, endurance events, paddle boarding, kayaking, canoeing, fishing, and other sporting events. However the County is lacking a properly funded sports commission, which would provide financial and other support to new events to assist such events.

To develop a successful sports tourism program, Pasco County must create a budget covering:

- Brand development
- Online presence
- Print materials
- Public relations
- Advertising
- Tradeshow
- Out of market visits
- Fam. (familiarization) visits
- Event hosting
- Event development

The Pasco County Sports Commission should be responsible for managing this budget, as well as the event incentive budget and process.

8. Develop or Engage 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

CONCLUSION AND NEXT STEPS

Although several new sports complexes are being proposed for Pasco County, impressive facilities will not by themselves generate sports tourism. The complexes must be part of a sport tourism destination brand strategy that is both effectively designed and implemented by experienced professionals. Pasco County can best utilize its multiple existing and proposed recreation and sports facilities by initiating more focused efforts to position the area as an attractive destination for sports and tourism. By encouraging the development of additional lodging, restaurant and entertainment opportunities to support events and better serve customers, Pasco County will not only support events and facilities by creating a better visitor experience but will also be more likely to keep tourism dollars within the county.

Pasco County must also develop a unique brand identity to be able to differentiate itself from other competitors in the market. Funding an effort to establish such a brand will take both a commitment of financial resources and political will, but is essential to achieving sports tourism success.

Based on the findings of this study, SFA does not recommend immediately moving forward with the development of new sports tourism assets beyond the currently identified potential future sports tourism developments.

Following the delivery of this report, SFA representative will engage in dialogue, questions and answers, and final updates to this report. These will result in an implementation plan, which will then be overseen by SFA and County officials. SFA's recommendation for the immediate future is to focus on developing Pasco County's sports tourism program using existing facilities and unique geographic assets.

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