

COLLECTIVE
BRAND • EXPERIENCES • SPORTS • TOURISM

EXPERIENCE FLORIDA SPORTS COAST

PASCO COUNTY COMMUNITY INVENTORY
& SPORT PARTICIPATION GAP ANALYSIS

INTRODUCTION

The Collective BEST has completed this exercise to evaluate the best strategic options for Experience Florida Sports Coast and Pasco County, Florida to incorporate a multi-use sports facility into their community. The initial vision is to dedicate approximately 150-acres towards a sports facility that will help drive sports tourism to the Pasco County area as well as benefit the surrounding community.

A thorough evaluation of proposed sports facility options is critical due to the unique opportunity to not only build something that is an asset to the community but also create something that is unique and can draw a niche audience within the market and sports tourism industry overall. A keen understanding of the local market and knowledge of the sports tourism industry as a whole is key to identifying the appropriate type of sports facilities Pasco County should further evaluate.

The Collective BEST leveraged their industry connections to evaluate venues, talk to event operators and engage the local community to fully understand what opportunities exist for Pasco County. But, it is not just about what we know, but about how we can apply what we know to developing and building a unique sports facility in the area. Our approach to the facility evaluation started at the national level and then drilled down to the local area to determine what the best opportunities for Pasco County and the region might be.

The following is a synopsis of our findings, recommendations and what we believe to be the next steps in this process.



THE SPORT TOURISM INDUSTRY

THE INDUSTRY

Over the years, the sports tourism industry has often been referred to as “recession proof.” The thought process behind this statement is that as all other sectors of the tourism industry slow during times of economic downturn, the sports tourism industry stays consistent or only experiences a slight decline. This is due to families being more willing to sacrifice other extracurricular activities before sports. More specifically, youth sports. As the sports tourism industry has continued to prove itself as recession proof, many communities have begun to invest in the business of sports tourism.

 38.4 Million Athletes Ages 7-17

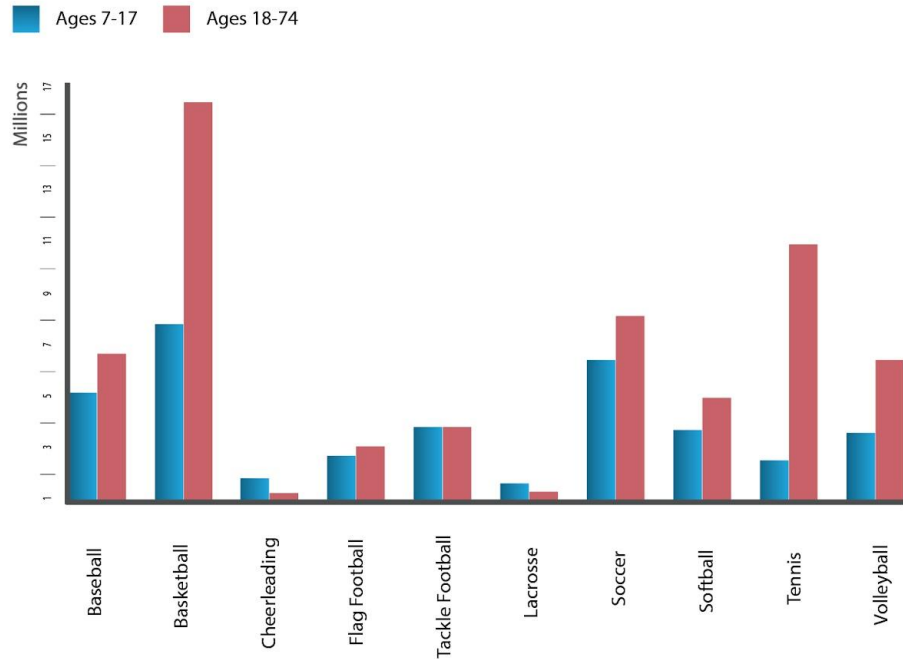
 62.6 Million Athletes Ages 18-65+



PARTICIPATION NUMBERS BY SPORT

Communities like Westfield, Indiana and Lake Point, Georgia have identified the sports tourism industry as their community's desired economic driver and have worked to develop and implement strategic plans to dedicate resources to the sports tourism industry. Now, both communities have made a name for themselves by building and operating two of the largest multi-sport complexes in the U.S., and the economic growth generated from these complexes has built an identity for their communities.

The opportunity for Experience Florida Sports Coast and Pasco County to continue to capitalize on the Sports Tourism industry and fully embrace it as an identity for the county is prime. The county already has very successful sports facility assets, but this proposed development presents itself as an opportunity to build something even bigger for the community!



THE STATS

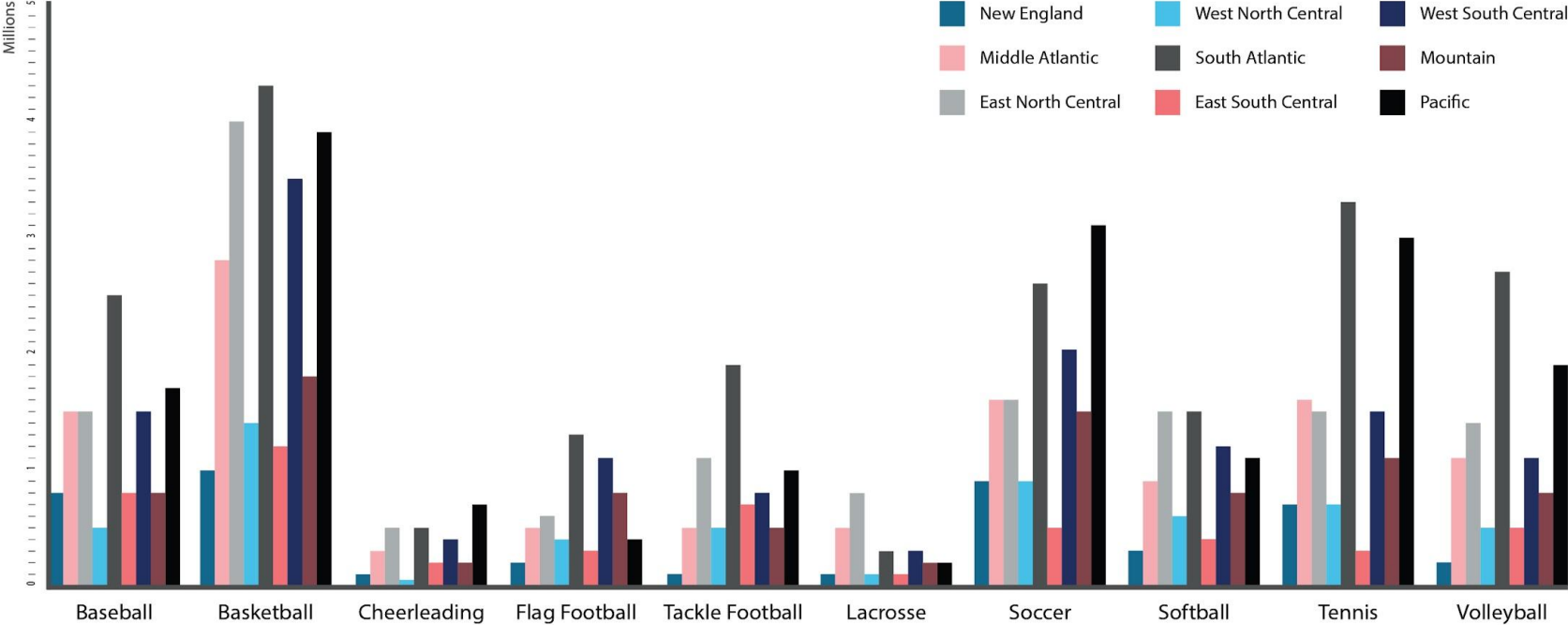
While it is believed that the sports tourism industry is recession proof, sport participation trends do still need to be factored into the decision making process for a potential sport facility development. The bar graph on the previous slide depicts 2020 participation numbers by sport and is then sorted by youth versus adult.

While it is interesting that court sports (basketball, volleyball, & tennis) appear to have the highest overall participation numbers, with soccer being the highest ranking non-court sport, the frequency of participation also needs to be taken into consideration. The bulk of basketball participants (42.9%), are considered to be infrequent participants as well as 38.9% of volleyball participants.

Additionally, the bar graph on the following page depicts sport participation by sport in each geographic region. The state of **FLORIDA IS INCLUDED IN THE SOUTH ATLANTIC REGION**, and ranks highest in; baseball, basketball, flag & tackle football, tennis and volleyball.

According to these participation numbers, there is not only an opportunity to cater towards youth sports, but adults as well. Florida's demographics, according to the latest census, estimate that 54% or 16.1-million Floridians are 18 years of age and over. This adult demographic should not be forgotten about when evaluating future plans.

PARTICIPATION BY U.S. REGION





It is important to denote the competitive environment that is generated due to the ever growing popularity of building sports facilities in the U.S. Less than 15-years ago, ESPN Wide World of Sports was the top travel location for youth sports teams. Now, there are sports facilities twice the size of the ESPN Wide World of Sports complex and are spread all across the county.

Regardless of the competitive environment, The Collective BEST believes there are still untapped, niche opportunities for Experience Florida Sports Coast and Pasco County to expand its offerings in the Sports Tourism industry.



**SPORTS FACILITIES
THROUGHOUT THE U.S.**

SPORTS FACILITY INVENTORY

In order to ensure a holistic approach to the evaluation of viable facility options is conducted, existing sports facilities throughout the U.S. need to be taken into consideration. Given that new facilities are opening up so frequently, it is difficult to compile a comprehensive listing. However, there are certain facilities that are considered to be the top facility for specific sports.

These facilities are well known for hosting national events for each of their respective sports and have developed partnerships with event owners and national governing bodies to continue to bring mega events to their venues.

EXAMPLE:

The IUPUI Natatorium, in Indianapolis, IN is considered to be the fastest pool in the U.S. and has been the host site for the Olympic Swimming & Diving trials for years.

East Naples Community Park, in Naples, FL has quickly made its name as the top facility for Pickleball and is home to the U.S. Open Pickleball Championships



U.S. VENUE LOCATIONS

Additionally, there are also sports facilities that are well known for their size and vast amount of offerings. These are traditionally made up of both indoor and outdoor facilities, have large quantities of fields, diamonds, or courts, and have supporting infrastructure to hold large sporting events.

Each of the additional sports complexes identified were designed with hosting large sporting events in mind. Their offerings range from 16-Tennis Courts in Hoover, Alabama to 51-Multi-Purpose Fields in Blaine, Minnesota.

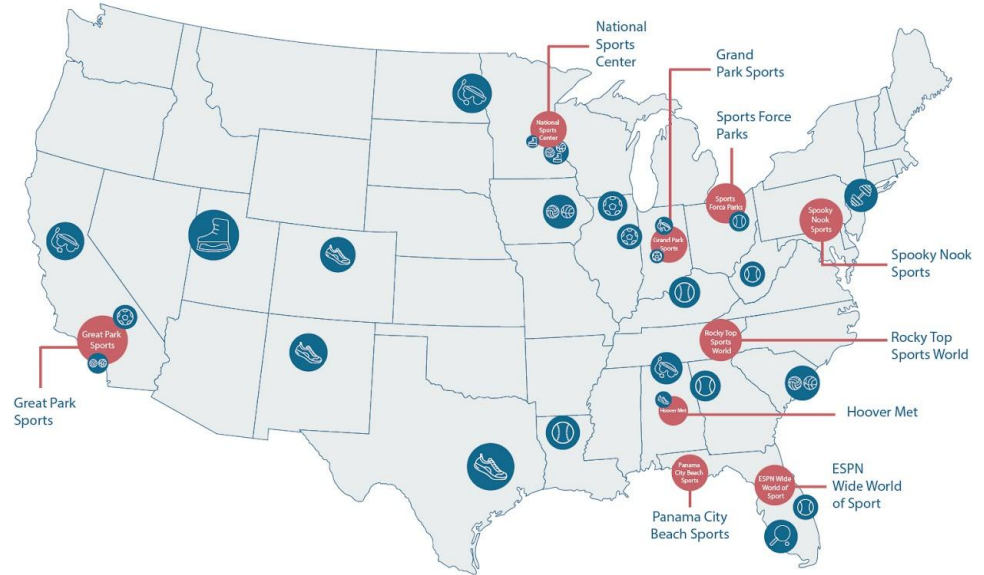


MULTI-SPORT FACILITIES

These multi-sport complexes are all built within close proximity to international airports, are surrounded by a large number of hotels with high room inventory, and have other recreational and entertainment facilities to support and entertain their visitors.

Complexes such as Grand Park Sports Campus, in Westfield, IN, located in the Crossroads of America, touts that they are within a one-day drive for more than half the U.S. population. Or, Spooky Nook Sports, in Lancaster, PA advertises that they are the largest indoor sports complex in North America.

Each location has found their niche in the market and has capitalized on it.





SPORTS FACILITIES IN FLORIDA

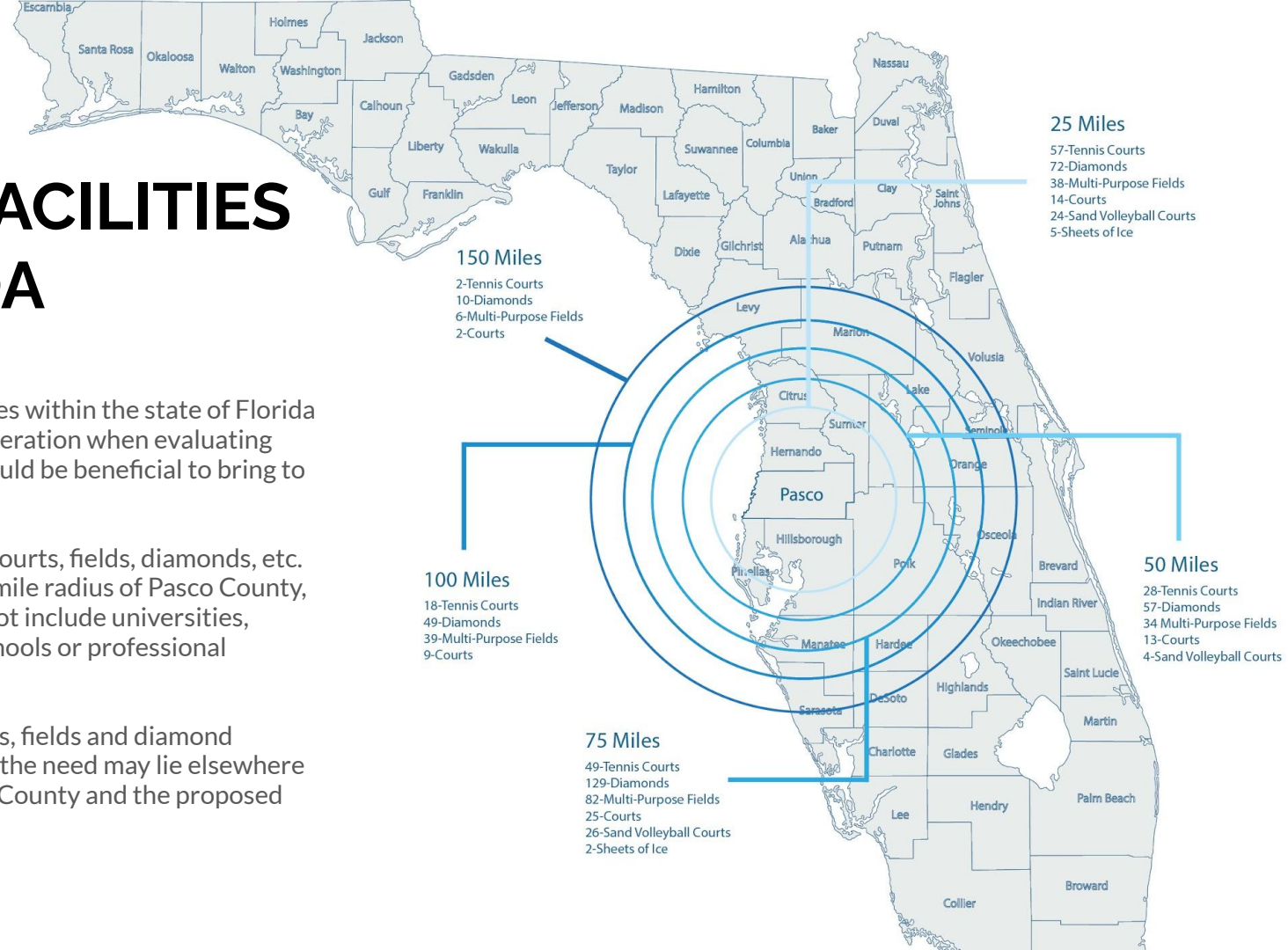


SPORTS FACILITIES IN FLORIDA

The existing sporting facilities within the state of Florida need to be taken into consideration when evaluating what type of new facility would be beneficial to bring to the state.

A comprehensive listing of courts, fields, diamonds, etc. was compiled within a 150-mile radius of Pasco County, FL. The number counts do not include universities, elementary schools, high schools or professional stadiums.

Due to the plethora of courts, fields and diamond facilities in the Florida area, the need may lie elsewhere for a sports facility in Pasco County and the proposed development.





PASCO COUNTY OVERVIEW

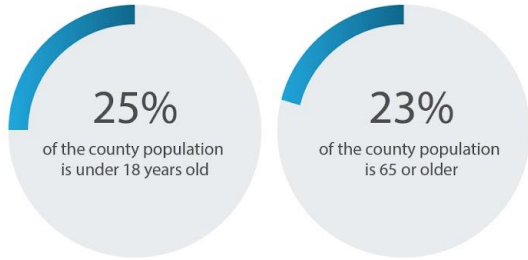
PASCO COUNTY

Experience Florida Sports Coast and Pasco County is already known as a premier destination for sports given that one out of every ten visitors to the area are visiting due to a sporting event. The existing sporting facilities compliment the destination which is already a desirable leisure travel location. The evaluation of a new marquee sports venue for the destination could be a transformative opportunity that could propel Pasco County to be a leading destination in the Sports Tourism industry.

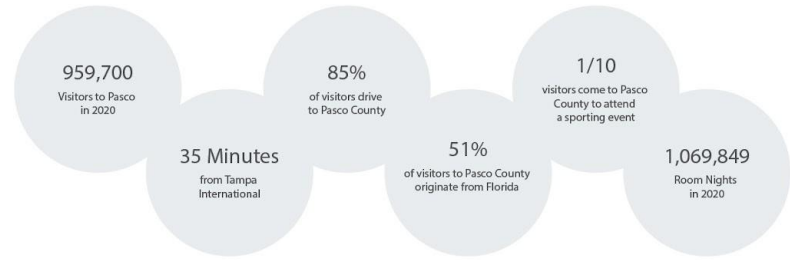
According to the 2020 Strategic Tourism Plan, Pasco County's vision is to be a recognized and influential community tourism leader through successful and productive destination marketing, development and advocacy partnerships. After receiving feedback from the operators of Pasco County's existing sports facilities it is clear that this vision is well on its way down the intended path.



Estimated 550,000 people



Tourism/Travel



Facility Statistics



While the county has been making great strides towards fulfilling their vision of becoming a tourism leader, The Collective BEST believes that there is still an enormous opportunity to continue to strategically enhance the county's sports facility offerings in the upcoming years.

The opportunity to specifically extend the sports tourism potential within the county was also identified in the SWOT analysis within Pasco County's 2020 Strategic Tourism Plan.



OBSERVATIONS

INSIGHTS

Included in the slides that follow are the most prevalent insights and recommendations that should be considered to further evaluate and better define the opportunities for Pasco County. Overall, it is clear that there is an ability to increase the sports facility offerings and strengthen the overall presence in Florida within the Sports Tourism industry.

The two most prevalent high-level insights are; developing strategic partnerships and taking into consideration all types of athletes when designing a facility.



STRATEGIC PARTNERSHIPS

The synergies that can be created between Experience Florida's Sports Coast, the hospitality industry and the local community are innumerable and the time to begin these potential partnership conversations is now.

While initial thoughts are to devote 150-acres towards a sports facility, attaining a better understanding of what the community needs to grow their existing programming should be taken into consideration before final plans are made. Additionally, establishing partnerships with potential Monday - Thursday users is vitally important for the success of any facility.

Establishing an open dialog with potential partners, will open the door to evaluate unique design elements and what growth opportunities there may be.

For example, if a partnership opportunity is identified with a local youth sports club, having an understanding of their projected growth potential is important in order to ensure the facility is able to accommodate that youth sports club long term. Additionally, this knowledge can also help influence the continued development timeline for the facility to grow as it's partners grow.

Developing strategic partnerships with the hospitality industry that will be an invaluable necessity to support a sports facility is also going to be vital.

For example, with sports facilities come sports teams and a high volume of athletes. The hospitality industry that develops in the surrounding area needs to be designed with this type of customer in mind. I.e. Restaurants that allow call ahead reservations and can accommodate large parties are ideal. Hotels who have high quantities of double bed rooms, offer continental breakfast and who have large common area space or meeting rooms for teams to gather are also beneficial.

These types of partnerships are also important for ensuring the surrounding hospitality industry is well informed of the events schedule and anticipated traffic numbers.

For example, fast food restaurants need to ensure they have the appropriate staff scheduled to work when a bigger event weekend is anticipated.



FACILITY DESIGN

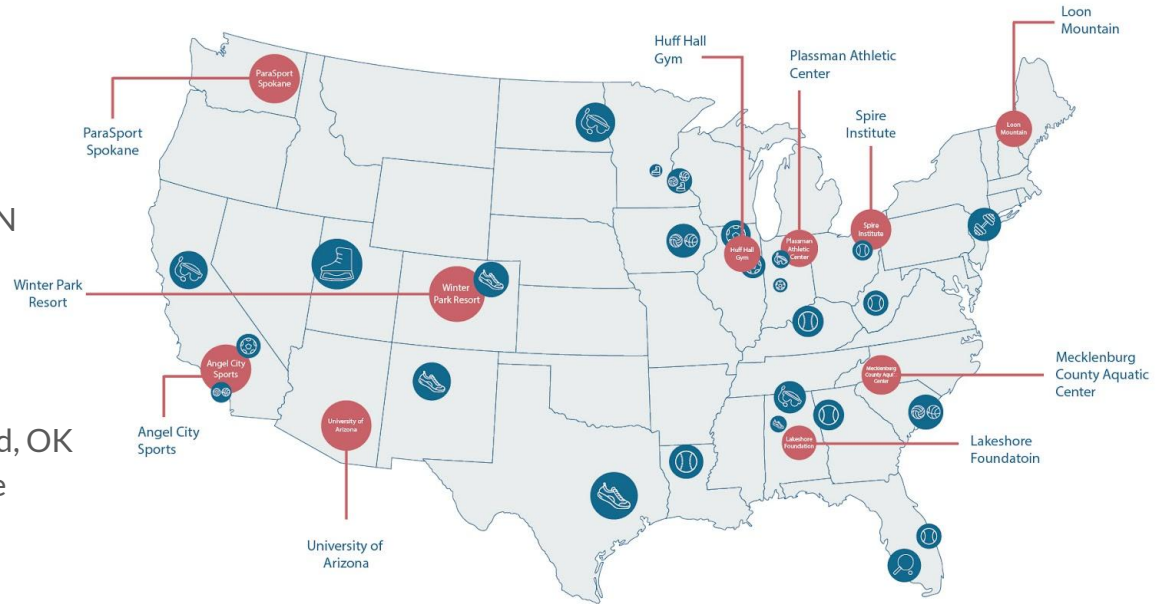
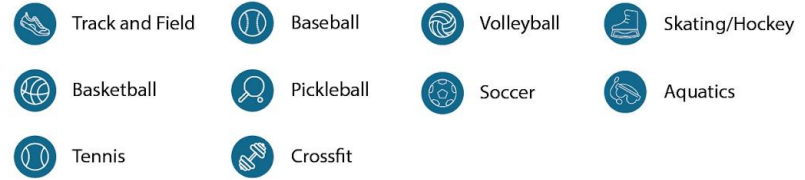
The research conducted depicted the number of courts, fields, diamonds, etc. in the Florida area, revealed the facilities across the country that are all well known for a specific sport or sports and identified the top multi-sport facilities in the U.S. With this information, a glaring disparity was brought to light when comprehensively looking at sporting facilities in the country. There are not any facilities completely dedicated to adaptive sports.

In addition to able-bodied athletes there are hundreds of thousands of amateur disabled athletes competing across the country in a variety of sports. The unique ability of sports to transcend linguistic, cultural and social barriers makes it an excellent platform for strategies of inclusion and adaptation. Furthermore, the universal popularity of sport and its physical, social and economic development benefits make it an ideal tool for fostering the inclusion and well-being of persons with disabilities.

Many of the facilities across the U.S. who host events for disabled athletes, or Para Athletes, make special or temporary accommodations but are not built with the thought that they would host adaptive sports/sporting events on a regular basis. Knowing this, Pasco County has a unique opportunity to develop a facility that could cater to both able-bodied athletes as well as disabled athletes if adequate foreplanning is made.

ADAPTIVE SPORTS FACILITIES

- Lakeshore Foundation, Birmingham, AL
- ParaSport Spokane, Spokane, WA
- Angel City Sports, Los Angeles, CA
- Spire Institute, Geneva, OH
- Plassman Athletic Center, Fort Wayne, IN
- Winter Park Resort, Winter Park, CO
- Mecklenburg County Aquatic Center, Charlotte, NC
- Huff Hall Gym, Champaign, IL
- University of Central Oklahoma, Edmond, OK
- Loon Mountain, Lincoln, New Hampshire
- University of Arizona, Tucson, AZ



In order to ensure all athletes are being taken into consideration, implementing the Design Thinking Process in advance of engineers design renderings will ensure all of the bases are covered.

Because there are no adaptive specific facilities in existence today, there are design elements that may be easily overlooked. A facility that is intended to be designed with the disabled athlete first, will need to have certain design accommodations to ensure it can support all.

For example, the parking lots for an adaptive sport specific facility may need to be designed with a higher number of parking spaces that can accommodate vehicles with wheelchair ramps than what is “standard”.

Other accommodations that will need to be considered are the number of ADA hotel rooms available, rental car offerings, restaurant accommodations, etc.





FACILITIES

FACILITIES

In addition to the above observations, the research conducted also brought to light gaps in the existing Florida facility offerings and specific sports facility recommendations for the Pasco County area.

The top two facility recommendations are;

1. Indoor Aquatics Facility
2. Multi-Purpose/Multi-Sport Indoor Venue





AQUATICS FACILITY

Given the number of pools in the Florida area today, and what those pools can support in terms of events, an aquatics facility should be further considered as an option for the proposed facility. More specifically, an aquatics center that is inclusive of an indoor pool that has a minimum of 10 racing lanes, a second pool designated as a warm-up/cool-down pool and is developed to support televised events would open up the opportunity to host several national and international events.

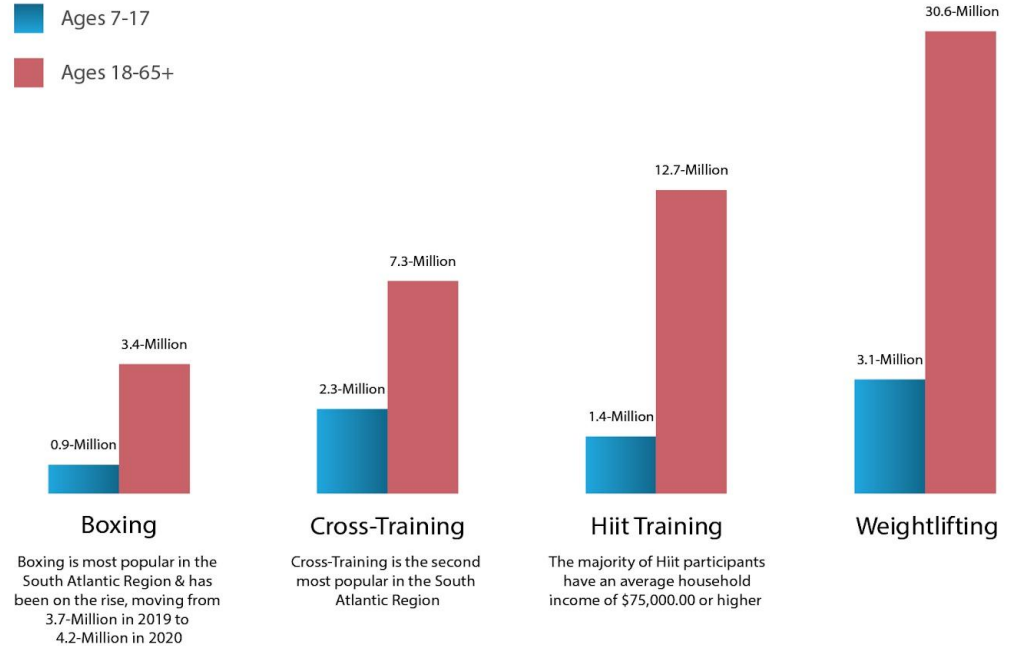
Another feature that could be considered when designing a natatorium, is a retractable roof. With this added feature, there is still an opportunity to capitalize on Florida's coveted weather, but still be able to operate during poor weather conditions.

In total, there are 41.9-million athletes who swim. Specifically in the South Atlantic region, there are 9.6-million swimmers. While swimming may not be the most popular sport, swimming is considered to be an excellent form of physical therapy and could attract area medical providers who are interested in expanding their PT offerings.

MULTI-SPORT VENUE

There are not many facilities that have been built just for Crossfit and strength and fitness competitions. In many cases, event operators utilize an existing outdoor stadium or indoor arena for their event. One of the largest events in this category is the crossfit games presented by Nobull. The six day competition welcomes an average of 17,000 spectators a day and produces over 25,000 roomnights.

While building a facility specifically dedicated to Crossfit competitions may not theoretically fill the bookable time, building a facility that can accommodate multiple sports will be able to diversify the calendar and bring in a variety of events and activities. Designing a multi-sport venue that is able to accommodate multiple sports would be a valuable option to continue looking into.





FACILITY PLANNING, OPERATING & MANAGEMENT

PLANNING & DEVELOPMENT

Depending on the end goals, there are several planning and development models that could be further evaluated. Many communities that are in the active process of developing and/or managing sports venues look to the private sector to assist in the planning and development strategy of their new facility.

After the exact location of the venue is determined and the preferred venue type is identified, The Collective BEST suggests further exploring viable opportunities to bring in private sector partners to assist with the evaluation process, development and operation of the proposed facility.



OPERATING

Taking into consideration the selected planning and development model, there could be a variety of operating models to evaluate as well.

It is common for communities who are looking at facilities of the caliber proposed here, to evaluate an operating model different from their community Parks and Recreation operated facilities. While focusing on quality and high level service is prioritized for both community parks and destination specific facilities, the target audiences each facility draws is very different. In many instances the local DMO or Sports Commission plays a vital role in the overall promotion of the complex therefore they should be involved in determining the appropriate operating model for the newly developed sports facility.



PROGRAMMING

While national and regional tournaments are the primary objective of developing a venue of this type, local play and weekday activity are also an important piece of the overall business mix. Identifying local activities and organizations that can produce activity during the week will be critical as programs are flushed out for the facility.

Community programming, senior programs and adult recreational programming will be a good mix of secondary activity to evaluate as part of the overall programming for the facility.





NEXT STEPS

NEXT STEPS

This exercise was conducted to assess the potential for adding another sports facility in Pasco County, Florida. Throughout the exercise we were able to connect with several stakeholders throughout the community to get their thoughts and insights on what they felt were the gaps in the sports facility offerings, but more in-depth conversations with these stakeholders and many others are needed to fully flush out the concept. Detailed conversations with events rights holders and NGB's of various sports were conducted to discuss opportunities in venues for their respective sports and event relocation opportunities.

There is high potential for a new sports facility to be successful in Pasco County! The community and surrounding area has already gotten a taste of the sports tourism industry but there is still an ability to continue to grow. The facilities highlighted in this evaluation are both viable options for Pasco County to further evaluate as you continue to develop plans.

The Collective BEST has thoroughly enjoyed working with the team at Experience Florida Sports Coast and would welcome the opportunity to continue assisting in the development of the plans for the sports facility.

As a result of this evaluation, the recommended next steps would be to do a thorough analysis of the two venue options recommended in this evaluation as well as others that were high on our radar. These next steps would entail Experience Florida Sports Coast and Pasco County conducting a full feasibility study for the market and the proposed sports facility options.