

HIGHLANDS COUNTY SPORTS TOURISM AND RECREATION FACILITY STUDY

VISIT SEBRING TOURIST DEVELOPMENT COUNCIL



May 31, 2023

POWERED BY THE HUDDLE UP GROUP



May 31, 2023

Casey Hartt
Lead Marketing Consultant
Visit Sebring Tourist Development Council
501 S. Commerce Avenue, Suite 3
Sebring, FL 33870

Dear Ms. Hartt,

Thank you for your efforts on our continued work in Highlands County, Florida. The community stakeholders throughout the area have been quite helpful during this process. The groundwork that has been set with local leadership will serve as a strong foundation for future sports tourism and recreation venue development efforts in the region.

Enclosed is a report detailing our findings for Deliverables 1, 2, and 3. This report includes an overview of industry-wide facility trends and benchmarking, as well as evaluation (audit) of the venue inventory in the Highlands County area, the efforts of Visit Sebring, and recommendations to enhance your destination's sports tourism "tool kit" in the future. Supporting these recommendations are economic impact projections and national best-in-class examples of similar venue types.

Please let me know if you have questions about the enclosed analysis. We are looking forward to any follow-up discussions.

Thank you again for all your support throughout this process!

Yours in Sport,

A handwritten signature in dark ink, appearing to read 'Jon S'.

Jon Schmieder
Founder + CEO
Huddle Up Group, LLC

Visit Sebring Tourism Development Council
Highlands County Sports Tourism and Recreation Facility Study
Executive Summary

Enclosed in the following pages is a report detailing the findings of the Huddle Up Group (hereafter the “Consultant” or “Consultant Team”) for Deliverable 1 as part of the larger overall sports tourism and recreation facility study conducted on behalf of Visit Sebring (hereafter referred to as “VS”). The scope of this project focuses on the following key elements, provided across three (3) deliverable dates:

1. Identification of sports tourism and recreation facility trends, support needs, along with venue and site characteristics. (Deliverable 1)
2. Evaluating the current sports tourism efforts of VS and comparing “Best in Class” sports tourism organizations in similar destinations. (Deliverable 1)
3. Assessing the current facility inventory in the region and benchmarking those facilities using the Sports Tourism Index™ as a scoring tool and industry trends. (Deliverable 2)
4. Providing a gap analysis and recommendations for new sports facility developments and existing facility enhancements that would drive the largest ROI to the community through sports tourism. (Deliverable 2)
5. Detailing an economic impact analysis for the top new facility development opportunity recommended by the Consultant Team. (Deliverable 2)
6. Identifying available organization and venue funding mechanisms, management models, and public/private partnership opportunities. (Deliverable 3)
7. Attend a community public workshop to present the findings and recommendations outlined in the final report. (Deliverable 3)

This sports tourism and recreation facility study was conducted with the input of three (3) members from the Consultant Team and included the following:

- A rating of VS and the destination through the Sports Tourism Index™.
- 13 phone interviews, and 11 electronic online survey responses.
- Two (2) in-person town hall meeting with local stakeholders.
- Tours of 22 different sites that included more than 30 Highlands County sports and event venues.
- Benchmarking against high performing destinations and venues both regionally and nationally.

The final report will offer recommendations for facility enhancement/development, along with supporting research and benchmarking that support each of the suggestions made by the Consultant Team.

Visit Sebring Tourism Development Council
Highlands County Sports Tourism and Recreation Facility Study
Synopsis

The sports tourism industry has grown consistently over the past 20 years. The study by the Sports Tourism and Events Association – *State of the Industry Report 2021*, states that the participant driven portion of the domestic sports tourism sector was responsible for more than \$39.0 billion in direct spending as of the end of 2021. This direct spending generated a total economic impact of \$91.8 billion to local economies, driving over 635,000 jobs and \$12.9 billion in taxes. Add to this industry growth the increased popularity of emerging sports such as pickleball, esports, and BMX, and recreational activities like golf, cycling, kayaking, the opportunity for the continuing expansion of economic development through sports and recreation tourism is tangible.

Methodology

Building off the prior work done by the Consultants Team in the area, the Consultant conducted an assessment on the current sports tourism efforts of VS and an analysis of the area's sports and recreation venues. The project was led by Huddle Up Group Founder + CEO Jon Schmieder (Phoenix, AZ), Vice President of Data & Strategy Dean Polk (Martinsburg, WV), and Snap Sports Founder + CEO Don Staley (Clermont, FL) and at its conclusion will have followed a six (6) step process that includes:

1. An evaluation of VS and the destination through the Sports Tourism Index™ (a proprietary benchmarking tool developed by the Huddle Up Group, summarized in Appendix C).
2. An organizational audit on the current sports tourism work of VS, including a review of previously conducted relevant research, as well as input from the 13 phone interviews and 11 survey responses from key community stakeholders. Individuals engaged included, among others, VS staff and board members, elected officials, community leaders, venue managers, athletic administrators, event owners, hospitality industry executives, and local sports club leaders.
3. A multiple day market visit (April 25-27, 2023) that consisted of two (2) town hall meetings and a sports tourism facility audit. The audit included tours of 22 existing or planned sports and entertainment sites that totaled more than 30 venues. (Note: As the Consultant Team has conducted prior work in the Highlands County area, some facilities were not visited again on this visit. Notes from prior site visits are also included in this report.)
4. The creation and delivery of this report aimed at improving the region's sports tourism and recreation venue "tool kit."
5. An in-person delivery and presentation to members of the VS staff and community stakeholders, outlining the findings and recommendations outlined in this report.
6. A follow-up conversation with key VS staff 30-days following the delivery of this playbook and presentation of the findings to discuss new developments and next steps.

Discussions were held around national best practices in key theme areas and focus was given to applications for VS. The intent of this process was to create community support for an increased sports tourism and recreation venue development effort in the region by giving local stakeholders a voice and fostering a teamwork mentality throughout the area.

The Consultant Team took the results from the stakeholder interviews, data from the Sports Tourism Index™, and the site visit to the region, then overlaid national best practices from several event rights holders and “Best in Class” sports destinations to develop and deliver the enclosed recommendations. These recommendations are intended to spark a dialog within the community’s leadership hierarchy to build a framework for next steps on an expanded sports tourism marketing effort.

The recommendations presented here are based upon what the Consultant Team believes are four (4) universal truths about VS’s sports tourism and recreation market position:

- There is a desire to grow sports tourism and recreation opportunities in Highlands County.
- The area lacks the necessary anchor facilities to drive tourism, particularly during the shoulder and off-peak seasons.
- The regional competition is fierce, and there is a focus on facility investment throughout the area.
- Many of the area’s recreation facilities are underdeveloped or unkept, particularly for a growing community, and lack the ability to serve as tourism-driving venues.

Visit Sebring Tourism Development Council
Highlands County Sports Tourism and Recreation Facility Study
Deliverable 1

Facility Trends, Support Needs, and Characteristics

In today's sports facility arms race, venues classified as "tournament friendly" and "anchor" are needed to attract top-tier participant focused championships and their related tourism dollars. A "tournament friendly" facility is defined as a venue that has an adequate number of fields/courts/sheets/lanes as well as the required supporting amenities to host local and regional events, however, would need to be cobbled together with additional locations to host larger national level competitions. An "anchor" facility is defined as a venue that has enough fields/courts/sheets/lanes along with the required and additional preferred amenities **all in one location** to host major regional or national events.

The chart below outlines the fundamental benchmarks for some of the most common types of facilities that event rights holders are looking to book. In addition to the pure field/court counts shown below, true "tournament friendly" and "anchor" facilities also require various amenities that provide rights holders the ability to host events. Many of those amenities are described in the following chart.

| Facility Type | Anchor | Tournament Friendly |
|-------------------------|--|--|
| Arena | A minimum seating capacity of 15,000 and a minimum arena floor space of 15,000 square feet. Premium seating, ample auxiliary rooms and locker rooms are required. A connected hotel or hotel in close proximity is preferred. | A minimum seating capacity of 7,000 and a minimum arena floor space of 10,000 square. Premium seating, ample auxiliary rooms, and locker rooms are required. |
| Baseball Stadium | A minimum seating capacity of 30,000. Premium seating, ample auxiliary rooms, and locker rooms are required. | A minimum seating capacity of 15,000. Premium seating, ample auxiliary rooms, and locker rooms are required. |
| BMX | A USA BMX sanctioned track with paved turns, a professional drop gate, and lights. A seating capacity of 1,500+ allows the facility to host the larger events. A public address system and ample parking are required. Permanent concessions and ample auxiliary rooms are preferred but not required. | A USA BMX sanctioned track with a professional drop gate is required. A public address system and ample parking are required. Seating capacity of 500+, lights, paved turns, concessions, and auxiliary rooms are preferred. |
| Bowling | A minimum of 40 lanes. Ideal lanes are a synthetic surface with a wood surface approach. Room for additional seating, ample auxiliary rooms, proper tournament software and scoring system are required. | A minimum of 20 lanes. Ideal lanes are a synthetic surface with a wood surface approach. Proper tournament software and scoring system are required. Room for additional seating and ample auxiliary rooms are preferred but not required. |

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| Cross Country | A course width of 10 meters or wider with at least 800 meters before the first turn is required. The ability to host multiple distances is required. A facility solely dedicated to cross country, ample parking, and a spectator friendly course are preferred but not required. | A course width of 10 meters or wider is required. The ability to host multiple distances is preferred. A spectator friendly course is preferred but not required. |
| Diamonds | A minimum of 12 diamonds. Well-maintained grass is the preferred playing surface. However, artificial turf extends the playing season and provides options for weather delays. Lights allow tournament directors options in scheduling and extensions of the playing day for weather delays. Covered benches and permanent concessions are a necessity. Permanent Wi-Fi and auxiliary rooms are preferred but not required. | A minimum of 8 diamonds. Tournament-friendly facilities can be used as satellite facilities for larger events. Covered benches and permanent concessions are a necessity. Lights are preferred. A stadium field, permanent Wi-Fi, and auxiliary rooms are not required. |
| Equestrian | A minimum of two competition arenas with an additional three exercise/practice arenas are. A minimum of 500 stalls, a seating capacity of 1,500+, a minimum of 200 RV hookups, public address system, and ample auxiliary rooms are required. Fenced in trailer parking, a large multi-purpose room, and a video board is preferred but not required. | A minimum of one competition arena with an additional two exercise/practice arenas are required. A minimum of 200 stalls, a minimum of 50 RV hookups, a public address system, and ample auxiliary rooms are required. Permanent concessions are preferred but not required. |
| Flat Fields | A minimum of 16 fields. Well-maintained grass is the preferred playing surface. However, artificial turf extends the playing season and provides options for weather delays. Lights allow tournament directors options in scheduling and extensions of the playing day for weather delays. A stadium field, permanent Wi-Fi, and auxiliary rooms are preferred but not required. | A minimum of 8 fields. Tournament-friendly facilities can be used as satellite facilities for larger events. Having fields with portable goals provides opportunities for the facility to host events for a variety of sports. Lights, a stadium field, permanent Wi-Fi, and auxiliary rooms are not required. |
| Football Stadium | A minimum seating capacity of 40,000. Premium seating, ample auxiliary rooms, and locker rooms are required. | A minimum seating capacity of 15,000. Premium seating, ample auxiliary rooms, and locker rooms are required. |

| | | |
|--|--|--|
| Golf Course | A minimum of 18 holes with a course length of 7-10,000 yards is required. A 200+ yard driving range, short game practice area, putting green, full-service clubhouse, scoreboard, permanent Wi-Fi, and ample auxiliary rooms are required. 36+ holes is preferred but not required. | A minimum of 18 holes is required. A 200+ yard driving range, putting green, clubhouse, scoreboard, permanent Wi-Fi, and ample auxiliary rooms are required. A short-game practice area and 36+ holes are preferred. |
| Ice (Excluding One Sheet Arenas) | A three-ice sheet facility with a seating capacity of 1500+ for the largest rink is required. Ample auxiliary rooms and 10+ locker rooms are required. Permanent concession stands and a seating capacity of 500+ for the second largest rink are preferred but not required. | A two-ice sheet facility with a seating capacity of 500+ for the largest rink is required. Ample auxiliary rooms and 5+ locker rooms are required. Permanent concession stands and a seating capacity of 250+ for the second largest rink are preferred but not required. |
| Indoor Courts (Basketball/Volleyball) | A minimum of 8 basketball/16 volleyball courts. Hardwood surface is preferred over sport court. Scoreboards, auxiliary rooms, and ample space for seating are preferred but not required. | A minimum of 4 basketball/8 volleyball courts. Tournament-friendly facilities can be used as satellite facilities for larger events. Hardwood surface is preferred over sport court. |
| Indoor Track | A 200-meter banked (hydraulic or permanent) track with a minimum of 6 lanes and seating for 1,500+ is required. Ample warm-up space and designated team camp space is required. Separate sprint lanes, television hookups, auxiliary rooms, and the track resurfaced in the last ten years are preferred but not required. | A 200-meter banked or flat track with a minimum of 6 lanes is required. Ample warm-up space and designated team camp space is required. Separate sprint lanes, auxiliary rooms, and the track resurfaced in the last ten years are preferred but not required. |
| Motor Sports Racing Track | A minimum seating capacity of 60,000. Premium seating, ample auxiliary rooms, and locker rooms are required. | A minimum seating capacity of 30,000. Premium seating, ample auxiliary rooms, and locker rooms are required. |
| Outdoor Track | A 400-meter track with at least 8 lanes and at least two each of the following: long/triple jump runways, high jump/pole vault runways, shot put rings, javelin runways as well as one discus/hammer ring cage and steeplechase water pit. A track resurfaced within the last 10 years. A video board, lights, timing system, warm-up space, team camp space, permanent concessions and restrooms are required. Seating for 3,000+, permanent Wi-Fi, and ample auxiliary rooms are preferred but not required. | A 400-meter track with at least 8 lanes and at least one each of the following: long/triple jump runway, high jump, pole vault runway, discus/hammer ring and cage, shot put ring, javelin runway. Lights, timing system, ample warm-up space, designated team camp space, permanent concessions and restrooms are required. A seating capacity of 1,500+, video board, permanent Wi-Fi, and ample auxiliary rooms are preferred but not required. |

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| Pickleball Courts | A minimum of 40 courts for major national events or 24 courts for regional events. Quality playing surface. A scoreboard for each court, lights for outdoor courts, locker rooms, and benches for each court are required. A stadium court, seating capacity of 1,500+, permanent Wi-Fi, and ample auxiliary rooms are preferred but not required. | A minimum of 8 courts are required to be a tournament friendly facility that can host smaller local events. Lights for outdoor courts and benches for each court are required. A scoreboard for each court, locker rooms, permanent Wi-Fi, and auxiliary rooms are preferred. |
| Soccer Stadium | A minimum seating capacity of 10,000. Premium seating, ample auxiliary rooms, and locker rooms are required. | A minimum seating capacity of 5,000. Premium seating, ample auxiliary rooms, and locker rooms are required. |
| Softball Stadium | A minimum seating capacity of 3,000. Premium seating, ample auxiliary rooms, and locker rooms are required. | A minimum seating capacity of 1,000. Premium seating, ample auxiliary rooms, and locker rooms are required. |
| Swimming Pool | A 50-meter pool with at least 8 lanes, a movable bulkhead, and a separate diving well with the appropriate diving platforms. Permanent Wi-Fi, electronic timing equipment, and ample auxiliary rooms are required. Seating capacity of at least 1,500, an additional warm-up pool, and deck space of 15+ feet are preferred but not required. | A 50-meter pool with at least 8 lanes and a bulkhead classifies as a tournament friendly facility. Permanent Wi-Fi, electronic timing equipment, and ample auxiliary rooms are required. Minimum seating capacity of 1,000 and minimum deck space of 10 feet are preferred. |
| Tennis (Indoor or Outdoor) | A minimum of 12 courts. Quality playing surface. A scoreboard for each court, lights for outdoor courts, locker rooms, and benches for each court are required. A stadium court, seating capacity of 1,500+, permanent Wi-Fi, and ample auxiliary rooms are preferred but not required. | A minimum of 6 courts. Lights for outdoor courts and benches for each court are required. A scoreboard for each court, locker rooms, permanent Wi-Fi, and auxiliary rooms are preferred. |
| Water Sports (Fishing) | A minimum of 4 boat launches with paved parking for at least 200 trailers. 500+ additional parking spaces for spectators is preferred. 5,000 square feet of dock space (can be temporary/floating). Power and lights throughout loading and parking areas, permanent restrooms, Wi-Fi, and cell tower coverage of fishing area is preferred. Amphitheater or convention space nearby. | A minimum of 2 boat launches with parking for at least 100 trailers. 200+ additional parking spaces for spectators is preferred. A minimum of 5,000 square feet of dock space (can be temporary or floating). Power and lights throughout loading and parking areas, permanent restrooms, Wi-Fi, and cell tower coverage of fishing area is preferred. |

In addition to those attributes described above, the top tourism-driving sports and recreation facilities in the country have spurred private investment in and around them, which is something that needs to be top of mind for regional leadership throughout this process. The highest-performing venues are positioned near a variety of restaurants and lodging options.

Finally, if tourism dollars are used to assist in the development and/or enhancement of facilities, VS should ensure that they receive “Favored Nations Status” at said facilities. “Favored Nations Status” is a term used to indicate a high priority for the CVB/sports commission to use/book a facility for tourism driving events. This is often achieved through an investment in the facility by the CVB/sports commission that carries with it an MOU outlining booking priority, fixed rental costs (if any), and numbers of dates available each year.

Further examples on facility funding methods and trends can be found in Appendix B.

Competitive Set & Gap Analysis

As part of the report, the Consultant Team utilized the Sports Tourism Index™ to evaluate VS’s current position within the sports tourism marketplace, benchmark the organization against its competitors, provide an analysis of growth since VS’s previous work with the Consultant Team in January of 2020, and provide baseline to measure future growth.

As the sole proprietor of this platform, the Consultants have exclusive use of the trademarked tool to determine the destination’s strengths, competitive set, and areas of opportunity. This analysis produces a score and ranking based on the organization’s answers to questions addressing four major “buckets” or theme areas. The questions and scoring method were derived from responses by leading event rights holders across the country when asked for their most important criteria in placing events in a particular destination. Benchmarking and rankings are generated from responses by 345 destinations and more than 5,500 facilities across the country. The four buckets, each with a maximum score of 25, are represented as follows:



January 2020 Sports Tourism Index™ Score

| Bucket | VS |
|------------------------|-------|
| Facilities | 6.50 |
| Destination Strength | 3.40 |
| Organization Structure | 3.90 |
| Events | 7.70 |
| Overall | 21.48 |

As stated by the Consultant Team at the conclusion of their previous work done for VS, it was their belief that Highlands County and VS were in an excellent position to grow their impact on tourism through sports. By comparing the growth and improvement across all buckets in these charts, and described in more detail in Appendix C, that belief was shown to be achievable.

Current Score & Industry Averages

| Bucket | Visit Sebring | Overall Average | Southeast Average | Under 500k Average |
|------------------------|---------------|-----------------|-------------------|--------------------|
| Facilities | 14.99* | 9.61 | 9.67 | 9.12 |
| Destination Strength | 5.60 | 11.92 | 11.22 | 10.83 |
| Organization Structure | 14.51 | 12.15 | 12.30 | 11.72 |
| Events | 10.50 | 8.14 | 8.31 | 7.92 |
| Overall** | 45.60 | 39.86 | 39.86 | 37.44 |

*VS's above average facility score is mostly driven by multiple high-scoring golf courses.

**Each bucket has a maximum score of 25, for a total of 100 points overall.

For a further breakdown of VS's scores, and their meaning, refer to Appendix C.

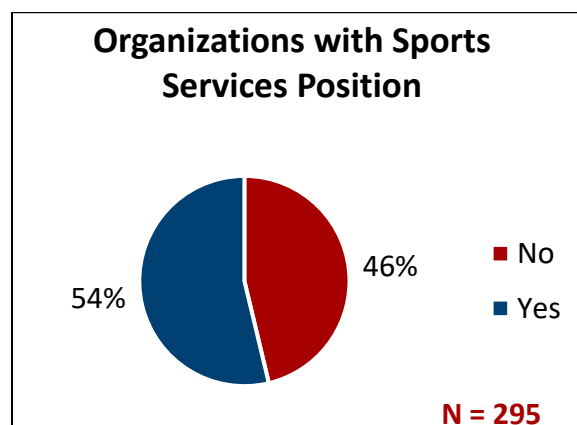
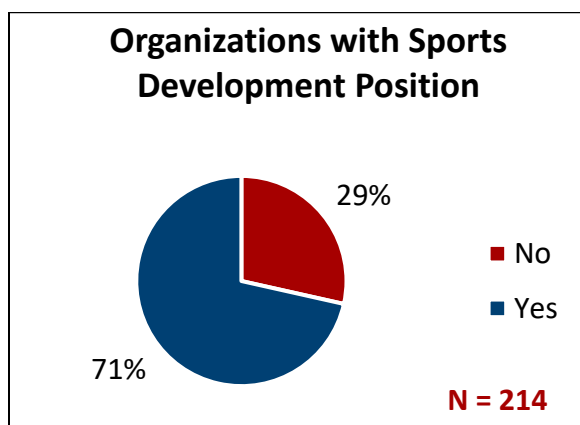
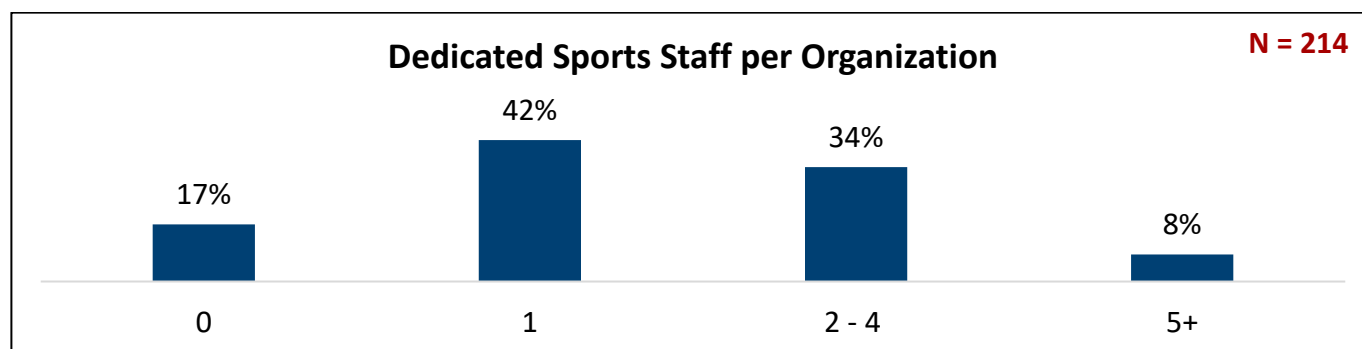
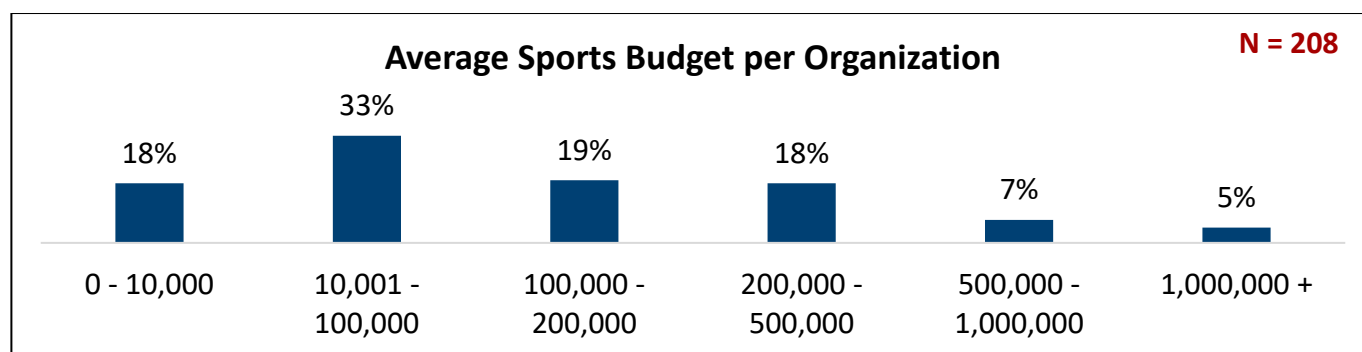
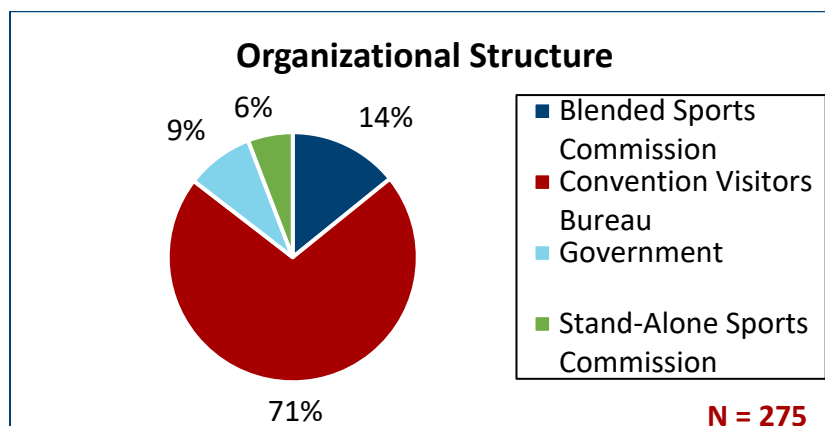
Using the scores generated by the Sports Tourism Index™, the Consultant Team was able generate a competitive set of destinations within the sports tourism market. Below is a list of organizations with similar scores to VS.

- **Overall:** Bloomington CVB, Foley Sports Tourism, Gainesville Sports Commission, Meet Chicago Northwest, Tuscaloosa Tourism and Sports, Visit Eau Claire
- **Facilities:** Dodge City Sports Commission, Discover Ames, Fargo-Moorhead CVB, Visit El Paso, Visit Mountaineer Country CVB, Visit Omaha
- **Destination Strength:** City of Aiken, City of Great Bend CVB, Scotts Bluff-Gering Sports Council, Visit Beloit, Visit Casper, Wilson County TDA
- **Organization Structure:** Campbell County CVB, Decatur Morgan County Tourism, Explore Sioux City, Explore Springdale, Lake Tahoe Visitors Authority
- **Events:** Augusta Sports Council, Explore Sioux City, Great Rivers & Routes Tourism Bureau, Iowa City Area Sports Commission, Jacksonville-Onslow Sports Commission, VisitGreenvilleSC

Finally, As VS beings to undertake the steps outlined in the recommendations provided in the later deliverables, there are several high-performing sports tourism organizations, similar in size and makeup to Highlands County and VS's structure, which should be looked at for best-in-class examples. These include, but are not limited to (in alphabetical order):

- Campbell County CVB (Gillette, WY)
- Dodge City Sports Commission (Dodge City, KS)
- Elizabethtown Tourism (Elizabethtown, KY)
- Fargo-Moorhead CVB (Fargo, ND)
- Fox Cities CVB (Appleton, WI)

National Standards in the Sports Tourism Market



Visit Sebring Tourism Development Council
Highlands County Sports Tourism and Recreation Facility Study
Deliverable 2

SWOT Analysis

Keeping the objectives of the RFP in the forefront while focusing on long-term sports and recreation tourism facility development, below is a SWOT analysis on the current position of VS and the region as a sports tourism destination. This analysis was derived from a combination of the aforementioned work done in the region, surveys, interviews, site visit, and data collected through the Sports Tourism Index™.

Strengths

1. Location & Community – Highlands County’s central location within Florida makes it ideal for hosting state tournaments. The destination is safe, affordable, and the county’s residents and businesses have generally shown themselves to be supportive of events that are hosted in the area. Though it lacks a major airport nearby, it is relatively easy to access via ground, as it is surrounded by multiple larger, more-densely populated, destinations within a short day’s drive.
2. Event History – Most notably, Sebring International Raceway, specifically the 12 Hours of Sebring race, has a long history of being a major tourism driver for the region. More recently, the Citrus Golf trail has provided economic impact to the community and the Highlands County Sports Complex has received positive reviews from rights holders for its high-quality playing surface.
3. Airstream Partnership – Visit Sebring’s recent partnership with Airstream Ventures has already paid major dividends for the community. Airstream provides VS with much needed bench strength in business development, event operations and management, marketing, and active community support among other areas within the sports tourism market.

Weaknesses

1. Facilities – Though VS scored above average in facilities as a whole, that number is mostly inflated by a few high-scoring golf courses, water venues, and Sebring International Raceway. During the Consultant Team’s interviews and survey of stakeholders, most respondents rated the area’s existing venues as “average,” “fair,” “non-existent,” and/or “under-developed.” This is especially true for traditional, participant-driven venues, where during the Consultant Team’s recent site visit, only one “tournament-friendly” and no “anchor” venues were visited. (Explanations of the Consultant Team’s “tournament-friendly” and “anchor” benchmarks can be found later in this report.)

Specifically, the current Highlands County Fairground’s land and building is old, too small, and lacks the necessary amenities needed to support the current needs of events rights holders. It appears the building is also no longer capable of supporting the needs of the current community, as many of those interviewed and surveyed mentioned the need for a new agriculturally focused, indoor facility to support local programs.

2. **Hotel Inventory & Airlift** - At just over 1,300 hotel rooms in the county, the region lacks the sufficient inventory of rooms needed for hosting larger sports tourism events or multiple events over the same dates. During larger events hotel prices can be very high and many visitors have to book rooms in neighboring counties. Not only does this send tourism-related tax dollars into other municipalities, but it can also be challenging for rights holders who have large events or may want to book their event on dates shared by another. Finally, the closest major airports serving the Highlands County area are a nearly two-hour drive or more from Downtown Sebring.
3. **Sustainable Funding** – Many of the county’s existing facilities are ageing and in need of routine maintenance and upgrades. With no funding source currently dedicated to sports facility infrastructure, Highlands County faces the threat of falling even further behind many of their regional competitors who are earmarking substantial funds to developing tourism-driving facilities. It is important that VS make the area’s elected officials aware of the value of sports tourism and the loss (in economic impact and tourism dollars) that could occur if investments aren’t made in facility infrastructure, especially tournament friendly and/or anchor facilities oriented towards youth sports.

Opportunities

1. **Facility Enhancement & Development** – In today’s sports facility arms race, venues classified as “tournament friendly” and “anchor” are needed to attract top-tier participant focused championships and their related tourism dollars. A “tournament friendly” facility is defined as a venue that has an adequate number of fields/courts/sheets to host local and regional events, however, would need to be cobbled together with additional locations to host larger national level competitions. An “anchor” facility is defined as a venue that has enough fields/courts/sheets on its own to host major regional or national events **all in one location**. In addition to the pure number of fields/courts/sheets, the top anchor facilities in the country also provide key amenities that event rights holders need to host high quality events.

Without added facility options, VS will be fighting an uphill battle against communities with newer and/or bigger venues (example: ESPN Wide World of Sports). Below is benchmarking information from a Huddle Up Group survey of over 300 event rights holders, outlining their ideal facility requirements for the most commonly used venues.

| Facility Type | Anchor | Tournament Friendly |
|-----------------|--|--|
| Flat Fields | Minimum 16 fields | 8-15 fields |
| Pool | 50m/8-10 lanes with diving well | 25m with diving well |
| Diamonds | Minimum 12 fields | 8-11 fields |
| Hardwood Courts | Minimum 8 Basketball/ 16 Volleyball | 4 Basketball/8 Volleyball |
| Ice | 3+ Sheets Hockey/ 6+ Sheets Curling | 2 Sheets Hockey/ 4 Sheets Curling |
| Tennis | Minimum 12 courts | Minimum 6 courts |
| Pickleball | 40-60 Courts (National) | 8-16 Courts (Local) 24-32 Courts (Regional) |
| Indoor Track | 200 meter/6 lanes/banked | 200 meter/6 lanes |

The following is a list of a few of the top performing sports tourism driving facilities in the country which meet the “tournament friendly” or “anchor” facility benchmarks described above. Many of which do, or will, directly compete with VS.

National Best in Class: Aurora Sports Park (Aurora, CO), Champions Center (Appleton, WI), Crossplex (Birmingham, AL), Dick’s Sporting Goods Park (Commerce City, CO), ESPN Wide World of Sports Complex (Lake Buena Vista, FL), Grand Park (Westfield, IN), Great Park (Irvine, CA), Hoover Met Complex (Hoover, AL), LakePoint Sports Complex (Cartersville, GA), Myrtle Beach Sports Center (Myrtle Beach, SC), National Sports Center (Blaine, MN), Spire Institute (Geneva, OH), Spooky Nook Sports Complex (Manheim, PA), Rocky Mount Events Center (Rocky Mount, NC), Virginia Beach Sports Center (Virginia Beach, VA).

Finally, if the vision of a new tourism driving facility can be realized, it should not be lost that the region’s youth will also have better places to participate in sports throughout the year. Hosting more practices and tournaments in the area will keep local dollars in the community rather than exporting them to bordering cities and states. As such, any new facility would likely help local clubs, and their participating families, save thousands of dollars a year that they currently spend on travel (and venue rentals) to/from facilities in neighboring communities.

2. Non-traditional & Silent Sports – The recent pandemic spurred an upward trend in participation rates for outdoor “silent” sports such as running, biking, geocaching, kayaking, and paddleboarding among others. Along with those, beach volleyball, and Spikeball, as well as traditional grass and court sports (soccer, rugby, volleyball, and tennis to name a few) have also seen recent expansions to outdoor and/or sand facilities. These sports listed above, and many others, now have tournaments that provide opportunities to destinations that lack “traditional” sports facilities. Highland County’s many lakes and outdoor recreation parks provide the area with an abundance of excellent natural resources needed to host many of these events.
3. Leverage Location – As mentioned above in strengths, Highlands County’s central location is perfect for hosting state tournaments and championships. The area’s year-round warm weather also makes it perfect for hosting regional-level outdoor events during months when it is generally not feasible for much of the rest of the country. VS and its stakeholders should focus on ensuring the organization’s marketing and sales strategies, as well as the area’s infrastructure (facilities, lodging, restaurants, etc.) are developed with an intentional effort to attract these types of events.

Threats

1. Community Silos – Many survey and interview respondents said that they believed there was an “individualist” attitude among the key groups and stakeholders in the county who feel resources haven’t always been distributed evenly. To this point, some individuals, municipalities, and private communities have started projects without consideration for what is best for the region or who may already be doing something similar. Though many of the various towns, schools, private organizations, and club programs all likely have a venue development plan in place, there is currently no sports and recreation master plan, specifically for tourism, in place for Highlands County. This lack of a regional facility master plan could lead to the development of redundant facilities, programming, and projects if the various entities are not communicating with one another.

2. Regional Competition – There are multiple competitors throughout Florida that are well established in the national sports tourism space (see Appendix A). The level of established competition from in-state destinations is only the beginning as there are also numerous communities throughout the Southeast that are currently expanding their sports tourism efforts. This growing competition makes it more difficult each day for VS to establish a foothold locally, regionally, and nationally. While Highlands County may not view themselves as “like” some of these communities, their presence in the sports tourism space will require VS to pick its proverbial spots and be intentional about the focus areas it chooses with the resources it has to work with.
3. No defined community “Success” – During the stakeholder interview and survey process, the Consultant Team asked individuals for their definition of a “homerun” that VS could achieve for the community through sports and sports tourism. Responses from this question included growth of current events, new tourism-driving events (with conflicting responses for the preferred season), increased community collaboration, and better storytelling about the impact sports tourism has had on the region. Additionally, while both facility development and enhancement were mentioned most often, there was disagreement on whether those facilities should be community or tourism-focused, what types of sports and events those facilities should cater too, and where they should be located. While it is unlikely to ever have everyone completely on the same page, the community, and VS, would likely benefit from prioritizing and defining a singular goal that it can rally stakeholders behind to achieve before moving to the next project.

Venue Inventory & Analysis

The facilities visited during the Consultant Team's most recent and previous site visits are listed below in alphabetical order. Additionally, the following sections include facility notes, as well as current and potential ratings for each venue should tourism-focused enhancements be made.

- Alan Jay Arena
- Alan Jay Arena – Convention
- Alan Jay Wildstein Center for the Performing Arts - SFSC
- Avon Park Mowerplex
- Avon Park Senior Activities Center - Shuffleboard
- Charlie Brown Park
- Country Club of Sebring – Golf
- Country Club of Sebring - Pickleball
- Durrah Martin Baseball Complex
- Fireman's Field - Sebring High School Baseball Stadium
- Fireman's Field - Sebring High School Football Stadium
- Genesis Center
- Head Field Complex - Avon Park High School Baseball Stadium
- Highlands County Multi Sports Complex - Flat fields
- Highlands County Multi-Sports Complex - Diamonds
- Highlands Hammock State Park
- Joe Franza Stadium – Avon Park High School
- Lake Istokpoga Park - Fishing Tournaments
- Lake Jackson - Rotary Park and City Pier
- Lake Jackson - Veterans Beach
- Lake June Ball Fields
- Lake June-in-Winter - H.L. Bishop Park & Boat Ramp
- Lake Placid High School
- Lakeshore Mall
- Max Long Baseball/T-Ball Fields
- Max Long Soccer Fields
- Mosquito Creek Disc Golf Course
- Pinecrest Golf Club
- Pinecrest Golf Club
- Sebring Golf Club
- Sebring International Golf Resort
- Sebring International Raceway
- Sebring Recreational Club
- SFSC - Panther Field - Baseball
- SFSC - Panther Field - Softball
- Square 1 Shooting Range & Outdoor Venue
- Sun 'N Lake Golf Club
- Sun 'N Lake Preserve

Overall, the Consultant Team found very few “tournament friendly” facilities, particularly as it pertains to participant venues for traditional sports, and only one “anchor” facility in the Highlands County area. Below is a list of all venues (sorted alphabetically) that were evaluated by the Consultant Team. Using the Sports Tourism Index™, the Consultant Team rated each facility on a scale of 1 to 5 (with 5 being superior) at its current quality (CQ). The Consultant Team also predicts what the potential future quality (PQ) likely could be if tourism-focused upgrades were made to each venue. DNV indicates the Consultant Team did not visit the facility during its site tours. The rating system used the following color codes:

| |
|---------------------------|
| Anchor Facility |
| Tournament Friendly |
| Not of Tournament Quality |

| Facility Name | Facility Type | National Average | Index Score & CQ | PQ |
|---|-------------------|------------------|------------------|-----|
| Alan Jay Arena | Arena | 2.87 | 2.70 | |
| Alan Jay Arena - Conventions | Convention Center | 2.12 | 1.40 | |
| Alan Jay Wildstein Center for the Performing Arts - SFSC | Theater | 2.73 | 2.75 | |
| Avon Park Senior Activities Center - Shuffleboard | Other | 2.84 | 1.80 | |
| Charlie Brown Park | Pickleball Courts | 2.51 | 1.00 | |
| Country Club of Sebring - Golf | Golf Course | 3.52 | 3.35 | |
| Country Club of Sebring - Pickleball | Pickleball Courts | 2.51 | 1.40 | |
| Desoto City Park Softball Field | Diamonds | 2.29 | 1.05 | DNV |
| Durrah Martin Baseball Complex | Diamonds | 2.29 | 1.65 | |
| Fireman's Field - Sebring High School Baseball Stadium | Baseball Stadium | 2.49 | 1.35 | |
| Fireman's Field - Sebring High School Football Stadium | Football Stadium | 2.43 | 1.45 | |
| Golf Hammock Country Club | Golf Course | 3.52 | 3.45 | DNV |
| Head Field Complex - Avon Park High School Baseball Stadium | Baseball Stadium | 2.49 | 1.25 | |
| Highlands County Multi Sports Complex - Flat fields | Flat Fields | 2.33 | 2.30 | |
| Highlands County Multi-Sports Complex - Diamonds | Diamonds | 2.29 | 2.25 | |
| Highlands Hammock State Park | Other | 2.84 | 2.50 | |
| Highlands Ridge | Golf Course | 3.52 | 3.35 | DNV |
| Joe Franza Stadium - Avon Park High School | Football Stadium | 2.43 | 1.25 | DNV |
| Lake Istokpoga Park - Fishing Tournaments | Water Sports | 2.61 | 1.30 | |
| Lake Jackson - Rotary Park and City Pier | Water Sports | 2.61 | 1.30 | |
| Lake Jackson - Veterans Beach | Water Sports | 2.61 | 1.30 | |
| Lake June Ball Fields | Diamonds | 2.29 | 1.70 | |

Venue Scores (cont'd)

| | | | | |
|--|----------------------------|------|------|-----|
| Lake June-in-Winter - H.L. Bishop Park & Boat Ramp | Water Sports | 2.61 | 1.30 | |
| Lake Placid High School | Baseball Stadium | 2.49 | 1.45 | DNV |
| Lake Verona - Donaldson Park & Boat Ramp | Water Sports | 2.61 | 1.30 | DNV |
| Lincoln Heights Ball Field | Diamonds | 2.29 | 0.80 | DNV |
| Lorida Softball Field | Diamonds | 2.29 | 1.15 | DNV |
| Max Long Baseball/T-Ball Fields | Diamonds | 2.29 | 2.25 | |
| Max Long Soccer Fields | Flat Fields | 2.33 | 1.50 | |
| Mosquito Creek Disc Golf Course | Disc Golf Course | 3.41 | 3.45 | |
| Pinecrest Golf Club | Golf Course | 3.52 | 3.35 | |
| Placid Lakes Golf Course | Golf Course | 3.52 | 3.30 | DNV |
| River Greens Golf Course | Golf Course | 3.52 | 2.90 | DNV |
| Roger Scarborough Memorial Stadium - Lake Placid High School | Football Stadium | 2.43 | 1.35 | DNV |
| Sebring Golf Club | Golf Course | 3.52 | 3.20 | |
| Sebring International Golf Resort | Golf Course | 3.52 | 3.40 | |
| Sebring International Raceway | Motor Sports Racing Track | 2.23 | 3.80 | |
| Seven Sebring Raceway Hotel - Lemans | Convention Center | 2.12 | 1.05 | DNV |
| SFSC - Panther Field - Baseball | Baseball Stadium | 2.49 | 1.35 | |
| SFSC - Panther Field - Softball | Softball Stadium | 2.22 | 1.60 | |
| Skipper Ranch | Other | 2.84 | 0.40 | DNV |
| Spring Lake Pickleball Courts | Pickleball Courts | 2.51 | 1.30 | DNV |
| Square 1 Shooting Range & Outdoor Venue | Shooting Range | 3.07 | 4.15 | |
| Sun 'N Lake Golf Club | Golf Course | 3.52 | 3.90 | DNV |
| Sun 'N Lake Racquet Club | Pickleball Courts | 2.51 | 1.85 | DNV |
| Tanglewood Pickleball Courts | Pickleball Courts | 2.51 | 1.20 | DNV |
| Thakkar Tennis Center | Tennis (Indoor or Outdoor) | 2.43 | 1.45 | DNV |

The chart below highlights the top scoring venues within each facility type in the Highlands County area as compared to the national average of all facilities of that type scored by the Sports Tourism Index™. The red and yellow coding in the “Highest Scoring Facility” column once again represents that facility’s status as “Anchor,” “Tournament Friendly,” or “Not of Tournament Quality.” The shading in the “Difference” column represents the difference in scores, with the darker the red shade being the furthest below the national average and the darkest green being the furthest above the national average.

| Facility Type | National Average | Highest Scoring Facility | Difference |
|---------------------------------------|------------------|--------------------------|------------|
| Arena | 2.87 | 2.70 | -0.17 |
| Baseball Stadium | 2.49 | 1.45 | -1.04 |
| BMX | 3.09 | N/A | N/A |
| Bowling | 3.68 | N/A | N/A |
| Convention Center | 2.12 | 1.40 | -0.72 |
| Cross Country | 3.29 | N/A | N/A |
| Diamonds | 2.29 | 2.25 | -0.04 |
| Disc Golf Course | 3.41 | 3.45 | 0.04 |
| Equestrian | 2.95 | N/A | N/A |
| Flat Fields | 2.33 | 2.30 | -0.03 |
| Football Stadium | 2.43 | 1.45 | -0.98 |
| Golf Course | 3.52 | 3.90 | 0.38 |
| Ice (Excluding One Sheet Arenas) | 3.01 | N/A | N/A |
| Indoor Courts (Basketball/Volleyball) | 2.81 | N/A | N/A |
| Indoor Track | 3.21 | N/A | N/A |
| Motor Sports Racing Track | 2.23 | 3.80 | 1.57 |
| Other | 2.84 | 2.50 | -0.34 |
| Outdoor Track | 3.23 | N/A | N/A |
| Pickleball Courts | 2.51 | 1.85 | -0.66 |
| Shooting Range | 3.07 | 4.15 | 1.08 |
| Soccer Stadium | 3.33 | N/A | N/A |
| Softball Stadium | 2.22 | 1.60 | -0.62 |
| Swimming Pool | 2.70 | N/A | N/A |
| Tennis (Indoor or Outdoor) | 2.43 | 1.45 | -0.98 |
| Theater | 2.73 | 2.75 | 0.02 |
| Water sports | 2.61 | 1.30 | -1.31 |
| Winter Sports | 3.10 | N/A | N/A |

Venue Notes

| Facility/Site | Notes from 2020 | Notes from 2023 |
|--|---|--|
| Ag Center Arena | This facility may be suitable for community use; however, it has little tourism value. This facility is old, small, and doesn't have lights. There are not enough stalls to host regional rodeo events. | Limited bathrooms and parking. |
| Alan Jay Arena | This 28,000 square foot event center has some potential to host sporting events. The size of the facility along with the low ceilings limit the types of events that can be hosted in this facility. The baseball and football stadiums on the grounds are good assets for community use but have limited tourism value. | Retractable bleacher seating. Nice venue, but low ceilings. |
| Alan Jay Wildstein Center for the Performing Arts - SFSC | | 1600-1800 seats. Beautiful interior. Could be used for cheer/dance events. Limited backstage and break out space. No alcohol allowed. |
| Avon Park Mowerplex | This is a very unique facility that could use some maintenance and upkeep. The lights and parking are adequate; however, the stands and restroom infrastructure need improvements. | DNV (no longer in use.) |
| Avon Park Senior Activities Center | This facility contains 22 all-weather protected shuffleboard courts. Though this is an older facility that could use some maintenance, it is a solid asset in the community. Combined with other shuffleboard facilities in the county, the ample number of courts could be highly valuable to attract regional and national tournaments. | Covered facility that could be multi-purpose for cornhole or other similar events. Adjacent to Verona Lake and its beach. |
| Charlie Brown Park | | 6 court facility. |
| City of Sebring Lee Palmer Horseshoe | These horseshoe pits are not of great quality. The addition of wood backboards, permanently mounted stakes, and additional parking would add value. | Usability is questionable. Needs work. |
| Country Club of Sebring | | 8 pickleball and 6 tennis courts all with lights. Some question as to who runs the courts. Will need to check for clarification. New, first-class facility. Restaurant next to courts. |
| Durrah Martin Baseball Complex | | 4 youth size diamonds with lights and a playground. |

Venue Notes (cont'd)

| Facility/Site | Notes from 2020 | Notes from 2023 |
|---|--|--|
| Fireman's Field (Football and Baseball) | With a good amount of seating, there is potential to use the grass field portion of this facility to act as a satellite venue for local and regional tournaments. Improving the quality of the field surface would add value to this facility. The track surface is of average quality, however, there are not enough lanes to host top-flight track events that bring significant tourism value. | Turf is in outstanding shape on both football and baseball. Some of the best we saw on the site tours. New track, however, it is only 6 lanes which limits its use for many events. |
| Genesis Center | | Quality indoor facility capable of one high school basketball court or three pickleball courts. New, but a church venue mostly for community programming. |
| Head Field Complex | A nice, well maintained high school baseball stadium field with lights and a scoreboard. The stadium has adequate amenities including a scoreboard, infield practice area, and seating. The youth fields are very deteriorated, need completely new surfaces and a lot of maintenance. Though these facilities may serve the community well, they do not provide sports tourism value. | No major updates since last visit. Adequate stadium with scoreboard and lights. |
| Highlands County Multi Sports Complex | This complex with 5 diamonds and 4 flat fields is a very nice facility. The diamond surfaces are high quality with lights and covered dugouts. The addition of foul ball netting would be beneficial to the safety of spectators. The concessions, restrooms, meeting, and press box facilities are of great quality. The flat fields have high quality surfaces. Only one flat field has lights. Adding lights to every field would increase the hours of play. While the parking is good, additional parking could provide value. If this facility is adequately marketed it could be extremely advantageous for the local hospitality industry. | Very nice quality. With correct marketing and targets, this facility could be very sellable to event organizers. Facility is marketable with the playing surface alone. Possible opportunity to acquire approximately 100 acres of adjacent land. |
| Highlands Hammock State Park | This 9,000-acre State Park is a unique facility that can be used for cycling, running, triathlon, and other endurance races. If this asset is used to its full potential, it can make a positive impact on the community through sports tourism. A potential downfall of this facility is the location, as it sits 10-15 minutes away from hotels and restaurants which could hinder usability and attendance. | Without a doubt this facility could be used for cycling, running, triathlons, and any other endurance races. Challenges are limited access to restaurants and hotels. *Seven Lakes nice small facility with restrooms. Will need to work with the state to gain greater access for events. |

Venue Notes (cont'd)

| Facility/Site | Notes from 2020 | Notes from 2023 |
|--|---|---|
| Joe Franza Stadium - Avon Park High School | This is a community facility with various sports elements. Though these facilities may serve the school well, it does not have tournament potential as it lacks quality, in the areas of lighting, seating capacity, and number of fields of one type. | DNV |
| Lake Istokpoga Park - Fishing Tournaments | This bass lake has a good history of hosting events and was recently named one of the top lakes of the decade by Bassmaster Magazine. The continued investment in infrastructure will be crucial to continue hosting significant tourism driving competitions. Adding weigh-in facilities, docks, and parking will add value. | 5th largest lake in Florida. Plans to add additional boat trailer parking area that will help with overflow, widening the main road and a new ramp. Quality facility. |
| Lake Jackson - Rotary Park and City Pier | This recreational lake can be used as an asset for several events including triathlons. The lake is well located in the hub of Sebring. Continuing to invest in infrastructure and amenities will be beneficial. One issue with this facility is the lack of quality parking nearby. | |
| Lake June Ball Fields | The diamond portion of this facility is good quality with lights, covered dugouts, and concessions. The accessible dream field doesn't have lights, yet it serves as a great community asset. The flat field portion of this facility is not of great quality. The goals are old and the facility does not have any lights, limiting the times available for play. With some maintenance and investment, this facility could be a valuable tourism asset. | Diamond turf still in good condition. Rectangle fields still need turf upgrades. No lights on the Field of Dreams field. Plans for possible pickleball courts. |
| Lake June-in-Winter - H.L. Bishop Park & Boat Ramp | This lake is good for water sports. There is a great viewing area of the lake from the shore with a community center and restroom facilities. This facility has limited parking, which can be a problem when hosting large-scale events. | Beautiful lake. Has restrooms however limited parking, docks, and launch access which will be a challenge for hosting larger fishing tournaments. |
| Lake Placid High School | This flat field and diamond facility is older and needs some updates and maintenance. The flat field grass surface is of good quality while the diamond field is of average quality. These facilities may be a good community asset; however, they have little tourism value. | DNV |
| Lake Verona - Donaldson Park & Boat Ramp | | Park next to the Avon Shuffleboard Courts. |

Venue Notes (cont'd)

| Facility/Site | Notes from 2020 | Notes from 2023 |
|-----------------------------------|---|---|
| Lakeshore Mall | This facility isn't structurally designed to become a sports facility. Major investment would be required to repurpose the space as a sports venue. However, the land could be an asset for new facilities should the mall eventually be decommissioned. | Vacant box store. Potential for indoor sports facility for pickleball? |
| Max Long | This complex has ten grass diamonds and the potential to host local and regional events. With covered dugouts, permanent concessions, and lights on each field we consider this a tournament friendly facility that can serve as satellite venue for larger events. Scoreboards on each field, safety netting, field maintenance, additional fields, and an increase in parking spots would be required to increase the sports tourism value of this facility. The single flat field does not provide any sports tourism value. | No major updates or changes in quality since the previous visit. Outstanding grass quality on flat fields. |
| Mosquito Creek Disc Golf Course | | Not of the greatest quality. Number of usable holes/course length in question. Would be better served as a different venue due to space limitations. |
| Pinecrest Golf Club | This golf course has a good history of hosting significant events. Though the clubhouse is small, it has a full-service restaurant and some space for events. | DNV |
| Sebring Golf Club | | Standard municipal golf course. |
| Sebring International Golf Resort | | Former Spring Lake Golf Club. Main course and driving range currently closed. Short course is open. |
| Sebring International Raceway | This established facility is an excellent tourism asset. The venue is set up to continuously execute large scale events and can be quite versatile in what it hosts on the grounds. In addition to the assets on site at the current venue, there is a large quantity of open grass fields on the property which has the potential to be developed into various flat field sports facilities. | No major changes since the last visit. Incredible facility that is a focal point for the community. Outstanding possibilities including for outdoor rectangle fields. |

Venue Notes (cont'd)

| Facility/Site | Notes from 2020 | Notes from 2023 |
|---|---|---|
| Sebring Recreation Club | The number of shuffleboard courts at this facility provide a strong asset to the community. The outdoor courts need some updates and maintenance, the covered courts are of good quality. Combined with the shuffleboard courts in Avon Park, it is very unique to have this quantity of shuffleboard courts in one community. These facilities should be used as a tourism driving asset. | DNV |
| SFSC | The baseball and softball stadiums are nice with a solid playing surface and adequate attributes including lights, scoreboards, and covered dugouts. Additional seating would be advantageous to host college championships and tournament championship games. The tennis courts have lights but could use some maintenance and improvements including the addition of scoreboards. The swimming pool is a recreation pool with several diving boards. Due to the size and number of lanes (6) this pool has little sports tourism value. The indoor gym has 2 volleyball and up to 2 basketball courts with retractable seating. There are ample auxiliary rooms and parking for events and tournaments. | Quality small college baseball stadium with amenities. Tennis needs updates and appears not to be used very often. |
| Square 1 Shooting Range & Outdoor Venue | | Sport clay options (16 stations on a 1-mile loop) and 10 pistol/rifle bays. All outdoor. Owners are considering adding 3D archery and there is ample land to do so and for other smaller silent sport opportunities. Would benefit from a second access road. |
| Sun 'N Lake Preserve | Intricate system of off-road bike trails. The trails are not in close proximity to hotels or restaurants. The small parking lot is insufficient to host sporting events. However, this asset can be marketed as a leisure sports venue. | DNV |
| Sun 'N Lake Golf Club | Very nice golf course with a strong history of hosting events. Putting and chipping areas are sufficient. The newly renovated clubhouse has a full-service restaurant, ample indoor meeting space for events and hospitality. The fairly new tennis/pickleball courts are of good quality. | DNV |

Facility Recommendations & Economic Impact Projections

Based on the results of the facility audit, the national experience of the Huddle Up Group in the sports tourism industry, and their knowledge of the current landscape in the region, the following are a list of facility enhancement and/or development recommendations the Consultant Team believes could bring significant economic impact to the region by way of tourism-focused events. Most importantly, to achieve this level of impact, VS must ensure any facility projects are done with an intentional design for tourism-driving tournaments and events. Lastly, any projects VS contributes to should be tied to the concept of “Favored Nations Status” or an MOU that guarantees preferred access, dates, and/or rental rates at the facility for tourism-driving events.

1. New or Enhanced Diamond Facility – Currently, the highest scoring diamond facilities in Highlands County, as scored by the Sports Tourism Index™, are the Highlands County Sports Complex and the Max Long Baseball Fields. However, even as the highest scoring and most tournament-ready facilities in the area, both fall below the national average of diamond facility scores.

Using the Sports Tourism Index™ as a benchmarking tool, the following chart summarizes the key characteristics possessed by the top diamond facilities in the country against the Highlands County Sports Complex (highest scoring in the community). Note that the “Difference” column, represents the gap between the top 10 facilities and the local facilities.

Diamonds = 879 scored by the Sports Tourism Index™

| | AVERAGES | | Highlands | |
|---|----------|---------|-----------|------------|
| | Top 10 | Overall | Co. SC | Difference |
| Fields | 17 | 5 | 5 | -12 |
| Fields with lights | 15 | 4 | 5 | -10 |
| Artificial turf fields | 9 | 1 | 0 | -9 |
| Auxiliary meeting rooms | 4 | 1 | 1 | -3 |
| Covered dugouts | 80% | 76% | Yes | |
| Stadium field | 50% | 28% | No | X |
| Permanent concession stand(s) | 100% | 76% | Yes | |
| Permanent restrooms | 100% | 98% | Yes | |
| Permanent Wi-Fi | 70% | 39% | No | X |
| Adequate Parking (60 spaces per field) | 100% | 97% | Yes | |
| ADA Compliant | 100% | 98% | Yes | |
| Ability to book (Definitely yes) | 90% | 55% | Yes | |
| Score | 3.92 | 2.29 | 2.25 | -1.67 |

National Best in Class: Champion Fields at Old Settlers Park (Round Rock, TX), Hoover Met Complex (Birmingham, AL), Grand Park Sports Complex (Westfield, IN), ESPN Wide World of Sports (Lake Buena Vista, FL), North Softball Complex (Fargo, ND), Gulfport Sportsplex (Gulfport, MS), Louisville Slugger Sports Complex (Peoria, IL), Ballpark of the Palm Beaches (West Palm Beach, FL), Champions Park (Gainesville, FL), Bentley Park Sports Complex (Tulsa, OK), mTrade Park (Oxford, MS), USSSA Space Coast Complex (Melbourne, FL).

| Facility Type | Anchor | Tournament Friendly | Highlands County SC Facility |
|---------------|-------------------|---------------------|------------------------------|
| Diamonds | Minimum 12 fields | 8-11 fields | 5 fields |

To provide the county with the true “tournament-friendly” diamond facility it currently lacks, the Consultant Team recommends building a new or expanding one of their current diamond facilities mentioned above. This would help the destination retain the events it currently hosts well into the future and would attract new tourism-driving tournaments to the region. Outside of field count (at least 8 fields to be considered a “tournament-friendly” facility), any upgrades to facilities should also include amenities such as seating capacities, improved dugouts, upgraded lighting at all fields, permanent Wi-Fi, and additional parking. At a minimum, a new or enhanced diamond facility in Highlands County should have the following elements:

- At least eight (8) full-size baseball/softball diamonds with lights.*
- A “stadium” field with locker rooms and seating that could accommodate at least 1,000 spectators with the ability to expand total seating for larger events.
- Adequate, preferably covered, bleacher seating at each field.
- Covered dugouts, scoreboards, PA systems, and a press box dedicated to each field.
- Ancillary meeting space for tournament operators, umpires, athletic trainers.
- Permanent restrooms, concession stands, and Wi-Fi throughout the facility.
- Parking that meets industry standards (at least 60 permanent spaces per field).
- A common area to accommodate athletes and spectators.
- ADA compliant.
- Ability for VS book the facility for tourism driving events (“Favored Nation Status”).

* Best practices show that at least 25% of fields should be entirely turf. Pending design, turfing an entire field could allow each full-size field (300’+ fences) to be turned into two youth fields. Turf fields not only allow for greater use (including non-baseball/softball events) but provide options during weather delays.

As part of the scope of work for this project, the Consultant Team was tasked with creating a top-line impact analysis should VS and its partners find a pathway to develop a new/enhanced diamond venue of this nature. Using local tax rates, an average daily room rate of \$130.00, and a conservative 25% capture rate for events that could fill the facility’s calendar, the Consultant Team believes the following new economic activity could reasonably be generated over a calendar year**:

- 10 new or expanded state, regional, and national tournaments.
- Over 23,500 total attendees relating to tournaments/competitions.
- More than \$6.1 million in total visitor spending.
- Nearly 12,000 hotel room nights.
- Hotel Occupancy Taxes of almost \$62,000.
- Sales Tax collections from visitor spending in excess of \$457,000.
- Total sports tourism related taxes generating nearly \$520,000.

**The detailed impact analysis can be found under different cover.

2. New or Enhanced Flat Field Facility – As with diamonds, the highest scoring flat field facility in the area (as scored by the Sports Tourism Index™), the Highlands County Sports Complex, also scores below the national average and lacks the adequate number of fields and level of amenities needed to be considered a “tournament-friendly” facility.

Using the Sports Tourism Index™ as a benchmarking tool, the following chart summarizes the key characteristics possessed by the top flat field facilities in the country against the Highlands County Sports Complex (highest scoring in the community). Note that the “Difference” column, represents the gap between the top 10 facilities and the Highlands County Sports Complex.

Flat Fields = 692 scored by the Sport Tourism Index™

| | AVERAGES | | Highlands Co. SC | Difference |
|--|----------|---------|---------------------|------------|
| | Top 10 | Overall | | |
| Full-sized soccer fields | 20 | 5 | 4 | -16 |
| Fields with lights | 15 | 3 | 1 | -14 |
| Artificial turf fields | 6 | 1 | 0 | -6 |
| Fields with portable goals | 22 | 5 | 3 | -19 |
| Auxiliary meeting rooms | 3 | 1 | 1 | -2 |
| Minimum of two team benches per field | 100% | 78% | No | X |
| Stadium field | 80% | 34% | Yes | |
| Permanent concession stand(s) | 100% | 66% | Yes | |
| Permanent restrooms | 100% | 70% | Yes | |
| Permanent Wi-Fi | 90% | 26% | Yes | |
| Adequate Parking (60 spaces per field) | 100% | 90% | Yes | |
| ADA Compliant | 100% | 91% | Yes | |
| Ability to book (Definitely yes) | 80% | 44% | Yes | |
| Score | 4.11 | 2.32 | 2.30 | -1.81 |

National Best in Class: Bell Bank Park (Mesa, AZ), Burns Soccer Complex (Little Rock, AR), ESPN Wide World of Sports (Lake Buena Vista, FL), Great Park (Irvine, CA), Kino Sports Complex (Tucson, AZ), Lake County Soccer Complex (Springfield, MO), Mercy Health Sportscore Two (Rockford, IL), Merrimack Sports Complex (Huntsville, AL), Mike Rose Soccer Complex (Memphis, TN), Moore Park (Lafayette, LA), Philip A. Bolen Memorial Park (Leesburg, VA), Reach 11 (Phoenix, AZ), Round Rock Multipurpose Complex (Round Rock, TX).

| Facility Type | Anchor | Tournament Friendly | Highlands County SC Facility |
|---------------|-------------------|---------------------|------------------------------|
| Flat Fields | Minimum 16 fields | 8-15 fields | 4 fields |

With consideration to Highlands County’s size, geographic location, community needs, and the ability for VS to book tourism driving events, the data presented here indicates that it would benefit the area to develop or enhance a tourism-focused facility that could host state, regional, and some select national level tournaments. Beyond a pure field count, to become a valued asset for tournament organizers, the facility would need to include the amenities listed below to be considered a “tournament-friendly” facility.

- At least eight (8) full-size, lighted, flat fields.*
- A “stadium” field with locker rooms and seating that could accommodate at least 1,000 spectators with the ability to expand total seating for larger events.
- Portable goals, scoreboards, team benches, PA systems, and a scorer’s table dedicated to each field.
- Added playing space around grass fields to allow for moving fields 5-10 yards in any direction to help reduce wear on playing surfaces.
- Ancillary meeting space for tournament operators and officials.
- Permanent restrooms, concession stands, and Wi-Fi throughout the facility.
- Parking that meets industry standards (at least 60 permanent spaces per field).
- A common area to accommodate athletes and spectators.
- ADA compliant.
- Ability for VS to book the facility for tourism driving events (“Favored Nation Status”).

* Industry best practices recommend turf for at least 25% of all fields at a site. Turf fields not only allow for greater use but provide options during weather delays. According to the Sports Venue Calculator Group, who specialize in sports venue construction and maintenance costs, the average turf field is available for 2,800 hours of use per year compared to an average grass field utilization time of 800 hours per year.

As part of the scope of work for this project, the Consultant Team was tasked with creating a top-line impact analysis should VS and its partners find a pathway to develop a new/enhanced flat field venue of this nature. Using local tax rates, a daily room rate of \$130.00, and a conservative 25% capture rate for events that could fill the facility’s calendar, the Consultant Team believes the following new economic activity could reasonably be generated over a calendar year*:

- 11 new or expanded state, regional, and national tournaments.
- Over 22,000 total attendees relating to tournaments/competitions.
- Almost \$4.2 million in total visitor spending.
- More than 8,000 hotel room nights.
- Hotel Occupancy Taxes over \$42,000.
- Sales Tax collections from visitor spending of nearly \$313,00.
- Total sports tourism related taxes generating over \$355,000.

*The detailed impact analysis can be found under different cover.

3. New Indoor Multipurpose/Hardwood Court Venue – The existing indoor, multipurpose and court-sport focused facilities in the region are limited, lack the number of courts that event owners demand, and have local user groups that often control the event calendar and limit availability. During the venue audit, the Consultant Team did not visit any “tournament friendly” or “anchor” indoor hardwood court venues.

Using the Sports Tourism Index™ as a benchmarking tool, the chart on the following page summarizes the key characteristics possessed by the top indoor hardwood court sports facilities in the country. Note that in the “Difference” column the darker the color of green, the larger the gap between the top 10 facilities and the average venues.

Indoor Courts = 443 scored by the Sports Tourism Index™

| | AVERAGES | | |
|----------------------------------|----------|---------|------------|
| | Top 10 | Overall | Difference |
| # Basketball Courts | 14 | 3 | 10 |
| # Volleyball Courts | 23 | 4 | 19 |
| Court Surface (Hardwood) | 73% | 78% | -5% |
| Scoreboard | 91% | 82% | 9% |
| Scorers' Table | 100% | 90% | 10% |
| Team Benches | 55% | 53% | 1% |
| PA System | 55% | 58% | -4% |
| Locker Rooms | 64% | 72% | -9% |
| Permanent concession stand(s) | 100% | 75% | 25% |
| Permanent restrooms | 100% | 99% | 1% |
| Permanent Wi-Fi | 100% | 89% | 11% |
| Parking | 100% | 98% | 2% |
| ADA Compliant | 100% | 99% | 1% |
| Auxiliary meeting rooms | 10 | 3 | 7 |
| Ability to book (Definitely yes) | 91% | 48% | 42% |
| Score | 4.02 | 2.80 | 1.22 |

National Best in Class: American Sports Center (Anaheim, CA), Bell Bank Park (Mesa, AZ), Community First Champions Center (Grand Chute, WI), Hoover Met Complex (Hoover, AL), LakePoint Champions Center (Atlanta, GA), Myrtle Beach Sports Center (Myrtle Beach, SC), Omaha Sports Academy (Omaha, NE), Rock Hill Sports Complex (Rock Hill, NC), Rocky Mount Events Center (Rocky Mount, NC), Virginia Beach Sports Center (Virginia Beach, VA).

| Facility Type | Anchor | Tournament Friendly |
|---------------|--|---------------------------|
| Indoor Courts | Minimum 8 Basketball/ 16 Volleyball | 4 Basketball/8 Volleyball |

The data presented here would indicate that it would benefit the region by developing a tourism-focused multipurpose facility that could serve the community and host state, regional, and some select national level tournament. Given the national experience of the Consultant Team and its knowledge of the current landscape in the region, the Consultant Team believes adding a “tournament friendly” indoor court facility to the current venue mix would provide a strong ROI to the destination. This new venue would provide the area with a tournament-ready facility capable of hosting events in basketball, volleyball, pickleball, futsal, esports, badminton, expos, tradeshow, banquets, and a variety of other sports and events.

Add to this, VS's ability to secure regional and national events and the multitude of local partnerships that are available, the key elements are in place to support the buildout of a new facility. If built, a new indoor court-focused facility in the region should have (at a minimum) the following elements:

- 4-6 (6 preferred) basketball court facility that could convert to 8-12 volleyball courts.
- A flexible championship court that could accommodate at least 1,000 spectators and the ability to expand total seating for larger championship events.
- Scoreboards, shot clocks, benches, and a press table dedicated to each court.
- Locker rooms and ancillary meeting space for tournament operators and officials.
- Permanent restrooms, concessions, PA system, and Wi-Fi throughout the facility.
- Parking that meets industry standards (at least 3.5 permanent spaces per 1,000 square feet).
- A common area to accommodate athletes and spectators.
- ADA compliant.
- Ability for VS to book the facility for tourism driving events ("Favored Nation Status").

As part of the scope of work for this project, the Consultant Team was tasked with creating a top-line impact analysis should VS and its partners find a pathway to develop a new/enhanced flat field venue of this nature. Using local tax rates, a daily room rate of \$130.00, and a conservative 25% capture rate for events that could fill the facility's calendar, the Consultant Team believes the following new economic activity could reasonably be generated over a calendar year*:

- 12 new state, regional, and national tournaments.
- More than 18,000 total attendees relating to tournaments/competitions.
- Nearly \$3.8 million in direct visitor spending.
- Over 7,000 hotel room nights.
- Hotel Occupancy Taxes generating over \$38,000.
- Sales Tax collections from visitor spending in excess of \$283,500.
- Total sports tourism related taxes of over \$322,000.

*Notes: The detailed impact analysis can be found under different cover.

4. **Dedicated Pickleball Facility** – When asked about the most popular sports in the area, one of the most common responses from those interviewed and surveyed was pickleball. As one of the fastest growing sports in the country, many destinations are making it a priority to build dedicated outdoor and/or indoor pickleball facilities. In Highlands County, most of the areas pickleball facilities are in private neighborhoods that aren't available to the great public and/or aren't interested in hosting tourism-driving events. As such, pickleball was among the most common responses among those same survey respondents when asked what facilities were most needed in the area.

Whether the community builds the indoor court facility mentioned above with pickleball capabilities in mind (typically three pickleball courts can fit on one basketball court), or they look to add a new dedicated venue, the benchmarking chart on the following page summarizes the key characteristics possessed by the top pickleball facilities in the country. Note that in the "Difference" column the darker the color of green, the larger the gap between the top 10 facilities and the average venues.

Pickleball Courts = 93 scored by the Sports Tourism Index™

| | AVERAGES | | Difference |
|---|----------|---------|------------|
| | Top 10 | Overall | |
| Total Courts | 19 | 0 | 19 |
| # of Indoor Courts | 8 | 3 | 5 |
| Outdoor Courts with Lights | 8 | 5 | 3 |
| Auxiliary Meeting Rooms | 6 | 1 | 5 |
| Scoreboards | 60% | 23% | 37% |
| Stadium Court | 70% | 15% | 55% |
| Benches at Each Court | 100% | 68% | 32% |
| Locker Rooms | 100% | 38% | 62% |
| Permanent Concessions | 90% | 40% | 50% |
| Adequate Parking | 100% | 92% | 8% |
| Permanent Wi-Fi | 100% | 52% | 48% |
| ADA Compliant | 100% | 94% | 6% |
| Ability to book (Definitely yes) | 90% | 48% | 42% |
| Score | 3.75 | 2.46 | 1.29 |

| Facility Type | Anchor | Tournament Friendly |
|---------------|-------------------------|--|
| Pickleball | 40-60 Courts (National) | 8-16 Courts (Local) 24-32 Courts (Regional) |

To be a tourism-driving asset, a new pickleball-focused facility should include, at a minimum:

- 16-24 dedicated, lighted, courts.
 - A flexible championship court that could accommodate spectators.
 - Scoreboards, benches, and a scorer's table dedicated to each court.
 - Locker rooms and ancillary meeting space for tournament operators and officials.
 - Permanent restrooms, concessions, PA system, and Wi-Fi throughout the facility.
 - Parking that meets industry standards (at least 12 spaces per court).
 - A common area to accommodate athletes and spectators.
 - ADA compliant.
 - Ability for VS to book the facility for tourism driving events ("Favored Nation Status").
5. Waterway Enhancement – Despite boasting numerous lakes ideal for fishing and other water/beach activities, it became apparent to the Consultant Team during the site visit and in speaking with those interviewed that the area lacked the infrastructure needed to truly take advantage of the county's water resources. While the area does host a few fishing tournaments each year, the lack of facilities and entry points limits the size of events that can be hosted. This results in potentially hundreds of thousands of dollars in lost revenue from participant and spectator lodging, dining, shopping, fueling, etc. As an example, the largest championships events from Bassmaster and Fishing League Worldwide, are reported to generate upwards of \$30 million in economic impact for their host destination.

Though some of these expansions are already in progress, to fully capitalize on these opportunities, VS will need to take an active role in working with key stakeholders to develop the facilities necessary to host events of over 200 participants plus spectators. Specifically for fishing/boating events, a top-tier facility would include:

- 4-6 boat launches.
- Minimum 200 paved spaces for truck and trailer parking.
- 500-750 parking spaces for spectators, preferably paved.
- 5,000 square feet of dock space (can be temporary/floating).
- Service Area.
- Power and lights throughout loading and parking area, permanent restrooms, Wi-Fi, cell tower for coverage on the lake.
- ADA compliant.
- Amphitheater
- Nearby lodging options tailored towards hosting overnight trailer parking.
- Ability for VS to book the facility for tourism driving events (“Favored Nation Status”).

National Best in Class: Green Pond Landing and Events Center (Lake Hartwell, SC), Osborne Landing (Richmond VA), Wolf Creek Park (Grand Lake O’ The Cherokees, OK), Volunteer Landing (Knoxville, TN), Lake Ray Roberts State Park (Lincoln’s Landing Tournament Fishing Park (Lincoln, AL), Isle du Bois (Lake Ray Roberts, TX), Westside Boat Launch (La Crosse, WI).

6. Shuffleboard Facility Enhancements – With two facilities less than 10 miles apart, the opportunity exists for VS to host tourism-driving shuffleboard tournaments in the region. With upgrades to playing surfaces, lighting, scoreboards, bathrooms, concessions, and added Wi-Fi, the area would not only be more suitable for regional and national events but would also be a major amenity for the community. In addition, when retrofitted properly, many shuffleboard facilities have turned into entertainment venues capable of hosting other events like cornhole tournaments, concerts, banquets, and more.

Visit Sebring Tourism Development Council
Highlands County Sports Tourism and Recreation Facility Study
Deliverable 3

Venue Funding & Management Models

VS and its partners will need to identify a sustainable funding source to support the tourism-driving facility development projects needed to cement the area as a desirable sports tourism destination. To achieve this, it is important that the VS make the area's elected officials aware of the value of sports tourism and the loss (in economic impact and tourism dollars) that could occur if funds aren't available for basic sports tourism marketing dollars, deal-closing funds, and investment into facility infrastructure, especially tournament friendly and/or anchor facilities geared towards youth sports.

In order to enrich their communities, numerous markets across the country have implemented a dedicated tourism-based revenue source (a tax or assessment) to enhance their tourism-driving sports and recreation facilities. These revenue streams most often come in the form of a hotel occupancy tax, Tourism Improvement District (TID), a food and beverage tax, or a sales tax increase that is dedicated to the singular purpose of increasing overnight stays through hosting sporting events. A sample list of destinations that have gone down these funding pathways can be found in Appendix B.

Beyond these traditional funding mechanisms, the various municipalities of Highlands County and many of the communities' corporate leaders have a vested interest in the sports market and how it can positively impact the area's youth. A discussion with the area leaders should be had around what resources could be brought to the table for new sports facilities and local program development. This is an area for deeper discussion with community and state leaders, local businesses, and charitable organizations that have an influence on, or access to, potential funding sources that could enrich sports tourism in the destination. Examples of this type of conversation could include:

- What increase to the current hotel lodging tax collected by Visit Sebring can be made?
- What access to prepared food taxes, sales taxes, and/or a new TID might be available?
- What partnership and/or grant opportunities exist?
- What impact would these options have on the community?

Specifically, TIDs, which have become increasingly popular in recent years, are a customizable assessment on select businesses within the tourism industry. To enact a TID, state enabling legislation is required before one can be implemented at a local level (this legislation has been approved in Florida.) Once enacted locally, these funds are led and controlled by the district's businesses. One advantage to TIDs is that their funds cannot be used for projects that are not specifically defined within the terms of the TID. Thus, these funds are protected from mission creep or political pressure to use the money for other projects that don't align with the goals of the TID.

The proposed TDC Asset Development Fund tax (“the 5th penny”) has the potential to generate an estimated \$400,00 to \$500,000 per year. Along with the existing facility development fund in place in the county, which has an estimated \$1.6 million currently available, there is an excellent opportunity for VS to support facility enhancement (upgrading current venues) and/or development (creating new venues). Should this assessment, or another funding source be secured, the Consultant Team has highlighted one way below how such a funding model could work for VS and its sports tourism program.

- **Sports Development Fund** –The national best practice for the activation of these newly identified funds is to use them as a catalyst for a “challenge grant” style program. That is, there would be a formal grant request process for VS’s partners to apply for funds in a dollar-for-dollar match on capital projects that would drive overnight stays to the region. For every dollar the partner invests, they would be eligible for a dollar from VS’s “Sports Development Fund.” Employing this type of matching program ensures that all parties have a vested interest in the positive outcome of each project and that VS’s investments are well protected. Effective use of these funds to drive more overnight stays would subsequently increase the impact of tax collections by these additional visitors. Ideally, VS should tie all grants to the concept of “Favored Nation Status” noted earlier in this report.

Visit Sebring Tourism Development Council
Highlands County Sports Tourism and Recreation Facility Study
Conclusion

Made evident from the \$39 billion in direct visitor spending generated in 2021 (SportsETA – *State of the Industry Report 2021*), sports tourism is big business. As a result, the competition has never been fiercer as there are more communities targeting the sports market than ever before. For Highlands County to be relevant in this market, Visit Sebring and its stakeholders must continue to build bridges with key players locally and pave the way for facility enhancement over the long term.

As with any new project, there are numerous variables that need to be considered when evaluating the ROI and risk in developing new sports facilities. The top multi-sport facilities in the country have spurred private investment in and around them, which is something that needs to be top of mind for local leadership throughout this process. In the experience of the Consultant Team, destinations who consider the overall impact on their community and citizens will have more success – and see a higher level of collaboration – than those that measure purely by room nights or bed tax collections. By working together to achieve their sports facility missions, the stakeholders throughout Highlands County will be more capable of accomplishing results not likely achievable by themselves.

As there are multiple opportunities on the table, each option should be looked upon independently. Should funding not be available for all the proposed projects, the ones that will likely deliver the biggest return on investment (in estimated visitor spending and tax revenues) and provide the community with the most opportunity (based on results from our audit and stakeholder surveys) should be elevated to the top of the priority list.

Given the analysis provided in this report, the Consultant Team recommends the projects be funded in the following order:

1. New or Enhanced Diamond Venue
2. New or Enhanced Flat Field Venue
3. New Indoor Multipurpose/Hardwood Court Venue
4. New or Enhanced Dedicated Pickleball Venue
5. Enhanced Waterways
6. Enhanced Shuffleboard Facility

Finally, as stated throughout this analysis, it should not be lost on VB and its partners that not only would these venue developments and/or enhancements drive more sports tourism, but the area's youth will also have access to better facilities to play and practice on throughout the year as well.

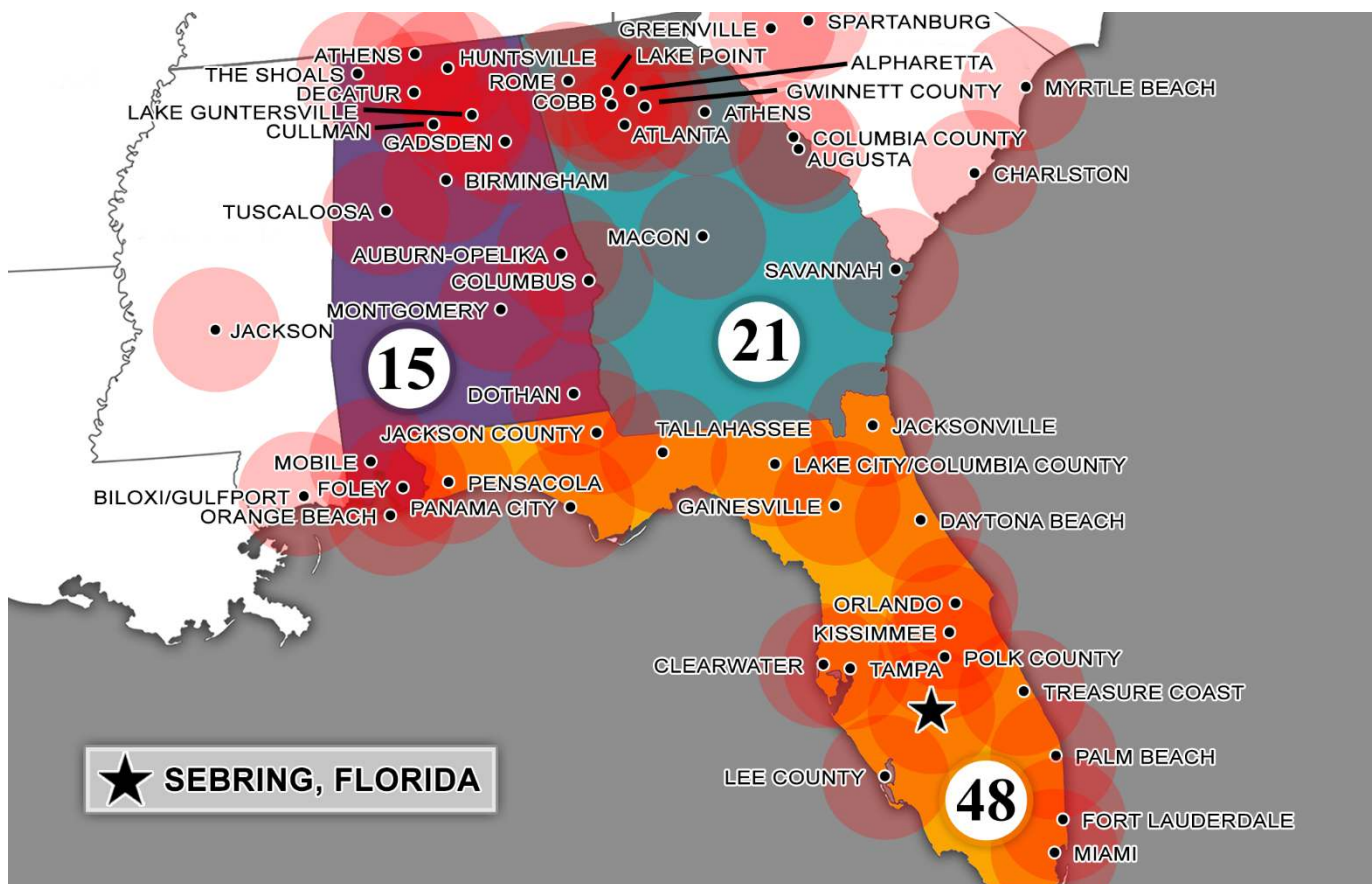
Yours in Sport,
Huddle Up Group, LLC

###

Appendix A – Visit Sebring Competition Map

The sports and events tourism industry is as competitive today as it has ever been. Numerous destinations market themselves in this niche industry in the form of a sports commission, DMO, convention & visitors bureau, city, or through an alternative organization.

Below is a visual representation of the various entities in VS geographic region that are active in the sports tourism and events space. Tournaments often attract teams from as far away as a full day's drive. This graphic shows the significant level of competition in this industry and the high-level geographic overlap amongst these communities.



Appendix B – Trends in Sports Facility Funding

The most common funding source for new facilities is a general fund allocation from the city/county where the facility is located as well as a land contribution for the venue to be constructed (again donated by the city or county). As discussed earlier in this report, several communities around the country have already, or are in the process of, raising their bed tax collection rate to fund sports-related facility development, including:

- Rockford (IL) having already finished a significant expansion of its outdoor sports venues, used bed tax dollars to bond \$10 million towards a new indoor facility. The Downtown Sports Complex carried a price tag of \$24 million and opened in late 2016.
- Evansville (IN) opened a \$15 million multi-use outdoor sports complex that is entirely funded by bed tax dollars. The future management of this facility will also be funded by bed tax dollars, and it is run by the DMO itself.
- Spokane (WA) bonded \$25 million against future bed tax collections to construct a new athletic field house (The Podium) which opened in December 2021.
- Shreveport (LA) passed a bed tax increase for the expansion of their Convention & Visitor Bureau's national marketing program. This new tax also supports the Independence Bowl (venue enhancements and improved matchups) and the Shreveport Regional Airport (incentives for new airline routes). This combined effort between three of Shreveport's leading agencies shows the economic development impact that sports tourism can have on a mid- or small-size market.
- Fox Cities (Appleton, WI) raised their bed tax rate from 6% to 10% to build a convention center, a new large (hardwood and ice) indoor sports complex, and to renovate three existing sports facilities used to attract regional and national tournaments. The new facility opened in October of 2019 and due to its early success, further expansions are already being discussed.
- Placer Valley (CA) allocated funds from an increased bed tax to develop and open a new indoor hardwood complex in 2018.
- Pasco (FL), in partnership with the Florida Sports Foundation, developed a new sports complex on 120 acres of county-owned property. Pasco County is investing \$11 million to the project, including \$8.5 million in tourist tax funds and \$2.5 million in unrestricted bond proceeds.
- In January 2016, Warren County (OH) raised the lodging tax one (1) percent to finance a \$10 million, 20 field sports complex. The rate hike increased the county hotel occupancy tax from 3% to 4%. The tax will be used over 20 years to pay off debt the Warren County Convention & Visitors Bureau will take on to pay for the complex.

Appendix B – Trends in Sports Facility Funding (Cont'd)

In addition to the hotel tax examples noted on the previous page, several communities have implemented a food and beverage tax for the purpose of developing or enhancing sports facilities.

- Elizabethtown (KY) passed a 2% food and beverage tax in 2012 to fund the development and management of the Elizabethtown Sports Park. In the first five years of operations, the “mega complex” generated nearly \$100 million in direct visitor spending to the community (according to studies commissioned with SportsImpacts, one of the top economic impact agencies in the country). Etown as it is known, is currently looking at facility expansion opportunities to capture even more sports tourism activity.
- For the past 30 years, Fort Wayne (IN) has implemented a 1% food and beverage tax that is used for capital projects. This program has funded several new buildings at the site of the Allen County War Memorial Coliseum arena, including a 100,000-square foot expo center and 5,000-seat baseball stadium. These funds have also been used to renovate the arena’s ice floor, to add 2,500 seats and meeting rooms to the arena. The fund generates \$7.5 million per year and is currently being considered to help finance a new arena downtown.
- Ashland (OR) employs a 5% food and beverage tax which garners nearly \$4.5 million a year. Twenty percent of these funds are allocated to the acquisition and preservation of open spaces for parks and recreation, with 80% of the funds used to retire debt for a recently completed community-wide waterway enhancement.
- Historically, King County (WA) has used intermittent funding from food and beverage taxes to build stadiums such as the King Dome. While this program is not active today, it has been a tool the Greater Seattle area has used in the past for venue development to entice professional sports teams to the area. Similarly, the State of Florida has a professional league stadium venue development program that is also funded by temporary food and beverage taxes, when needed. Finally, Milwaukee used a food and beverage tax to build American Family Field, home of Major League Baseball’s Milwaukee Brewers.
- In 2007, the State of New Jersey created the “Sports and Entertainment District Urban Revitalization Act.” Under this legislation, the community of Millville levied a 2% local food and beverage tax to fund a sports and entertainment district including a 500-acre motorsports park that hosts numerous events including NASCAR racing.

It should be noted that different states have different regulations regarding the use of funds generated by bed and/or food and beverage taxes. The cases outlined above are not exhaustive and should be viewed only as examples for further discussion.

Appendix C – Visit Sebring Tourism Development Council Sports Tourism Index™ Results 2020

Visit Sebring

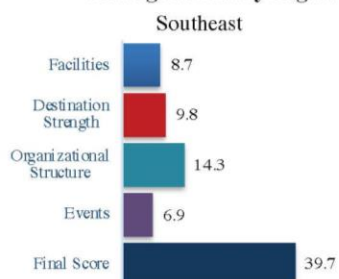


| Final Score | SPORTS TOURISM INDEX REPORT |
|-------------|------------------------------|
| 21.48 | Market Size: Small-Market |
| | Organization Type: CVB |
| | Geographic Region: Southeast |
| | Sports Budget: 0-500 |
| Tier 3 | |

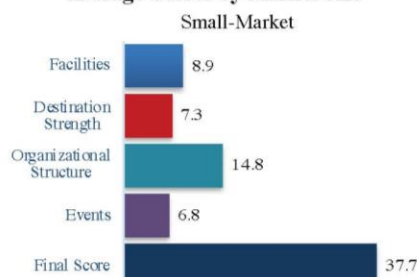
Score Breakdown



Average Scores by Region



Average Scores by Market Size



Recommendations

Facilities

Your destination has a limited inventory of facilities to use in attracting tourism driving events. Immediate focus should be on working with your local event promoters to enhance and expand their events that drive tourism to the community. Future focus should be on driving a high level discussion in the community on facility development of new venues that would have tourism and also community uses.

Destination Strength

Your destination has access challenges that are likely tied to limited air service and a small population within a day's drive. In addition, it is likely that there is a limited number of usable hotel rooms to support larger regional and national events. Lastly, local transportation may also be limited.

Organizational Structure

Your organization has limited staff and budget dedicated to the sports market. It is most often the case at this level that the staff member responsible for sports also has other sales verticals which can hinder their ability to consistently build relationships in the sports market. Community wide support for organizations at this level is often a significant challenge. This would commonly include elected officials and corporate leaders in the community.

Events

Your organization hosts an average number of bid-in events, may create and/or owns a handful of its own championships, and services some events at a basic level. Organizations that score in this area likely have the ability to work with their local promoters to create new tourism driving events and/or grow their current properties year over year. There is likely an opportunity for organizations in this category to enhance their efforts in serving events in order to strengthen renewal rates in the future.

Appendix C – Visit Sebring Tourism Development Council Sports Tourism Index™ Results (Cont'd) 2020

Visit Sebring

INDUSTRY AVERAGES REPORT



Overall Scores▲

| | Your Score | Average Score | Difference |
|--------------------------|--------------|---------------|---------------|
| Facilities | 6.46 | 9.83 | -3.37 |
| Destination Strength | 3.40 | 10.84 | -7.44 |
| Organizational Structure | 3.92 | 14.87 | -10.95 |
| Events | 7.70 | 7.16 | 0.54 |
| Total | 21.48 | 42.70 | -21.22 |

Facilities Breakdown*

| Participant-Based | Your Score | Average Score | Difference |
|-------------------|------------|---------------|------------|
| Golf | 3.30 | 3.81 | -0.51 |
| Flat Fields | 1.15 | 2.74 | -1.59 |
| Diamonds | 2.25 | 2.55 | -0.30 |
| Diamonds | 2.40 | 2.55 | -0.15 |
| Diamonds | 1.70 | 2.55 | -0.85 |
| Convention Center | 1.40 | 2.63 | -1.23 |

| Spectator-Based | Your Score | Average Score | Difference |
|---------------------------|------------|---------------|------------|
| Motor Sports Racing Track | 2.70 | 1.59 | 1.11 |
| - | - | - | - |
| - | - | - | - |
| - | - | - | - |
| - | - | - | - |

Destination Strength

| | Your Score | Average Score | Difference |
|-----------------------|------------|---------------|------------|
| Tourism Drivers^ | 2 | 3.42 | -1.42 |
| Hotels* | 0.60 | 1.98 | -1.38 |
| Travel Accessibility^ | 0.80 | 5.29 | -4.49 |

Organizational Structure*

| | Your Score | Average Score | Difference |
|--------------------|------------|---------------|------------|
| Sports Staff | 0.00 | 2.92 | -2.92 |
| Grant Program | 3.87 | 3.46 | 0.41 |
| Board & Committees | 0.05 | 1.56 | -1.51 |

Sporting Events

| Number on an annual basis | Your Answer | Average Answer | Difference |
|---------------------------|-------------|----------------|------------|
| Local Events | 6 | 26 | -20 |
| Bid-In Events Hosted | 2 | 10 | -8 |
| Events Serviced | 20 | 36 | -16 |

* Max score of 5

^ Max score of 10

▲ Max score of 25

Appendix C – Visit Sebring Tourism Development Council Sports Tourism Index™ Results (Cont'd) 2023

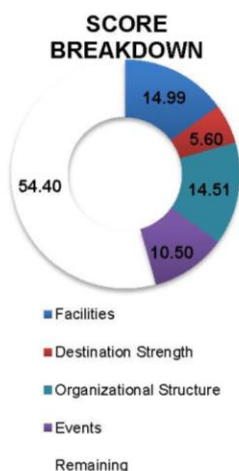
Visit Sebring



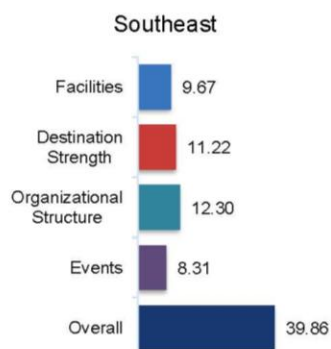
FINAL SCORE
45.60

SPORTS TOURISM INDEX REPORT

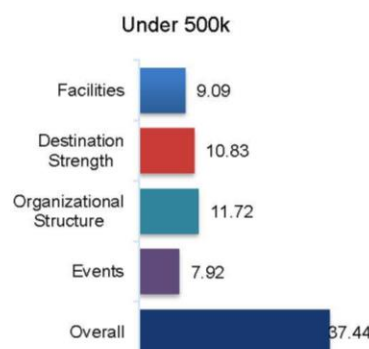
Market Size: Under 500k
Organization Type: DMO (CVB/Sports Commission)
Geographic Region: Southeast
Sports Budget: 400,001-500,000



AVERAGE SCORES



AVERAGE SCORES



RECOMMENDATIONS

Facilities

Your destination likely has a strong mix of both spectator based and/or participant focused facilities that meet or exceed the standards necessary to host top tier events. Focus should be on continuing to maintain and enhance existing venues and to look ahead and plan for the potential replacement of any aging facilities that will approach its natural shelf life in the next 3-5 years.

Destination Strength

Your destination is geographically accessible and offers a strong inventory of amenities and attractions that enhance the visitor experience. Future focus should be dedicated to "storytelling" about the positive attributes of the destination to strengthen demand for future visitation. Facilitation of high level discussions around destination development is important to maintain long-term success.

Organizational Structure

Your organization has limited staff and budget dedicated to the sports market. It is most often the case at this level that the staff member responsible for sports also has other sales verticals which can hinder their ability to consistently build relationships in the sports market. Community wide support for organizations at this level is often a significant challenge. This would commonly include elected officials and corporate leaders in the community.

Events

Your organization hosts an average number of bid-in events, may create and/or owns a handful of its own championships, and services some events at a basic level. Organizations that score well in this area likely have the ability to work with their local promoters to create new tourism driving events and/or grow their current properties year over year. There is likely an opportunity for organizations in this category to enhance their efforts in servicing events in order to strengthen renewal rates in the future.

4/24/2023

Appendix C – Visit Sebring Tourism Development Council Sports Tourism Index™ Results (Cont'd) 2023

Visit Sebring

INDUSTRY AVERAGES REPORT



Overall Scores ▲

| | Your Score | Average Score | Difference |
|--------------------------|--------------|---------------|-------------|
| Facilities | 14.99 | 9.61 | 5.38 |
| Destination Strength | 5.60 | 11.92 | -6.32 |
| Organizational Structure | 14.51 | 12.15 | 2.36 |
| Events | 10.50 | 8.14 | 2.36 |
| Overall | 45.60 | 39.86 | 5.74 |

Facilities Breakdown*

| Participant-Based | Your Score | Average Score | Difference |
|-------------------|------------|---------------|------------|
| Shooting Range | 4.15 | 3.07 | 1.08 |
| Golf Course | 3.90 | 3.52 | 0.38 |
| Disc Golf Course | 3.45 | 3.41 | 0.04 |
| Flat Fields | 2.30 | 2.33 | -0.03 |
| Diamonds | 2.25 | 2.29 | -0.04 |
| Convention Center | 1.40 | 2.13 | -0.73 |

| Spectator-Based | Your Score | Average Score | Difference |
|---------------------------|------------|---------------|------------|
| Motor Sports Racing Track | 3.80 | 2.26 | 1.54 |
| Theater | 2.75 | 2.73 | 0.02 |
| Arena | 2.70 | 2.88 | -0.18 |
| Softball Stadium | 1.60 | 2.22 | -0.62 |
| Football Stadium | 1.45 | 2.43 | -0.98 |

Destination Strength

| | Your Score | Average Score | Difference |
|----------------------------|------------|---------------|------------|
| Tourism Drivers^ | 2 | 3.20 | -1.20 |
| Hotels* | 0.60 | 1.15 | -0.55 |
| Destination Accessibility* | 1.70 | 2.16 | -0.46 |

Organizational Structure*

| | Your Score | Average Score | Difference |
|------------------|------------|---------------|------------|
| Sports Staff | 0.50 | 1.93 | -1.43 |
| Grant Program | 5.00 | 2.14 | 2.86 |
| Board & Advisory | 0.00 | 0.54 | -0.54 |

Sporting Events

| Number on an annual basis | Your Answer | Average Answer | Difference |
|---------------------------|-------------|----------------|------------|
| Local Events | 5 | 25 | -20 |
| Bid-In Events Hosted | 12 | 8 | 4 |
| Events Serviced | 20 | 27 | -7 |

* Max score of 5

^ Max score of 10

▲ Max score of 25