

VISIT SEBRING

SPORTS TOURISM ASSESSMENT



AUGUST 28, 2020

POWERED BY THE HUDDLE UP GROUP



August 28, 2020

Casey Hartt
Visit Sebring
501 S. Commerce Avenue, Suite 3
Sebring, FL 33870

Dear Casey,

Thank you for your efforts on our recent work in Sebring. You, your team, and your community stakeholders have been quite helpful throughout this process. The groundwork we have set with your local leadership will serve as a strong foundation for future sports tourism, venue, and event development efforts in the Sebring area.

Enclosed is the report detailing our findings. The report includes a SWOT analysis, an overview and evaluation of the venue inventory in the Sebring area, and recommendations to enhance the current sports tourism efforts of Visit Sebring (“VS”). The report includes recommendations for facility, event, and organizational development enhancements that would likely drive additional overnight stays and economic impact to the Sebring area. Both the SWOT analysis and the recommendations are built on a “Powers of Three” foundation (three main points, and in most cases, no more than three action items for each).

Please let me know if you have questions about the enclosed recommendations leading up to the roll out of the report and community presentations. We are looking forward to our next visit and our follow-up discussions.

Thank you again for all your support throughout this process!

Yours in Sport,

A handwritten signature in black ink, appearing to read 'Jon Schmieder', is positioned above the typed name.

Jon Schmieder
Founder + CEO
Huddle Up Group, LLC



Visit Sebring Sports Tourism Assessment Project Executive Summary

In the opinion of the Huddle Up Group (hereafter the “Consultant” or “Consultant Team”), Visit Sebring (“VS”) has an opportunity to solidify itself as a strong sports tourism destination in the Southeast. Throughout this process, Sebring’s community leaders showed a desire to grow sports tourism in the region and also for VS to become more engaged with the area’s stakeholders. Both of these characteristics are positive signs that VS is ready to build upon its long history and move ahead to even better things in the future. (Note: throughout this report when Sebring is referenced, unless specifically stated otherwise, we are talking about the entire Highlands County region).

This assessment project was conducted with the input of three members from the Consultant Team and included a 6-step process, including, but not limited to the following: 31 phone and in-person stakeholder interviews, two market visits including tours of 23 different sports venues, a town hall meeting with over 30 of the area’s sports tourism leaders, benchmarking against several high performing sports commissions both regionally and nationally, and finally a rating of Sebring and VS through the Sports Tourism Index© (a proprietary benchmarking tool developed by the Huddle Up Group, summarized in Appendix G).

The enclosed report offers a SWOT analysis and recommendations for both short and long-term execution. This document offers depth on each recommendation along with back up research and benchmarks that support each of the suggestions made by the Consultant Team. For each recommendation, action items are provided and a summary of all action items are provided in the appendices. In summary, there are four (4) primary and two (2) secondary recommendations:

Primary (Near Term)

1. Explore created sporting event opportunities.
2. Add bench strength to support current staff in sports marketing and business development.
3. Focus on sports facility enhancement.
4. Strengthen community alignment.

Secondary (Longer Term)

1. Develop a sustainable sporting venue funding source and expand business development efforts.
2. Collaborate to identify specific sports venue development opportunities.

Sports tourism has grown exponentially over the past two decades. The nature of the industry is that it is relatively “immune” to market factors such as troubled economies, war, high unemployment, 9/11, or similar factors. Studies by SportsETA show that the grassroots sports tourism industry is worth over \$15 billion and that there are more events today, with more athletes competing in those events, than ever before.

The opportunity at hand is to put in place an enriched sports tourism support system that engages all stakeholders throughout the Sebring region that will drive more economic development and also improve opportunities for community user groups. Through a community-wide effort, VS can drive increased economic activity through sport in the form of additional overnight stays, which will provide more lodging and sales tax revenues to the region year over year. With a few key adjustments, VS can lead this charge on behalf of the Highlands County community for years to come.

Visit Sebring
Sports Tourism Assessment Project
Synopsis and Recommendations

The sports tourism industry has grown consistently over the past 20 years. Studies show that the grassroots portion of this market is worth more than \$15 billion annually to the domestic economy. Whether you use the National Recreation and Park Association spending estimate (\$85 per person per day), the 2011 SportsETA (formerly the National Association of Sports Commissions) study (\$208), or the Destinations International (DI) economic impact calculator, the value of this niche market is palpable.

Add to this industry growth, the increased popularity of soccer, lacrosse, and other emerging sports (examples: Bicycle Moto Cross or BMX, pickleball, quidditch, rugby, e-gaming and ultimate), the opportunity for the continuing expansion of economic development through sports tourism is tangible.

Throughout the research process, it became apparent to the Consultant Team that there is an opportunity for Visit Sebring (“VS”) to enhance its presence in the sports tourism market. The key moving forward is for community stakeholders to work together in building and managing an expanded sports tourism marketing program, and to focus political capital on building relationships locally that can deliver upon the sports tourism mission of VS on a recurring basis from one year to the next. Through the execution of a strategic and targeted game plan, VS will enhance its position regionally as a player in the sports tourism and events industry.

Methodology

The Huddle Up Group, LLC (“Consultant” or “Consultant Team”) conducted an audit on the current sports tourism work of VS, and an analysis of the area’s sporting venues. The audit included a two-day market visit (January 13-15, 2020), 31 phone and in-person interviews, and a town hall meeting with over 30 community groups and key stakeholders represented. Stakeholders that were engaged included VS staff, community leaders, venue managers, athletic administrators, event owners, hospitality industry executives, and additional targets that were identified by VS. The Consultant Team also visited 23 existing sports and entertainment facilities, several of which have multiple sports and/or special event uses. These facilities are listed below, and also in Appendix E along with a rating for each venue and potential enhancements/improvements that could be made to help attract more tourism driving events.

- Ag Center Arena
- Avon Park High School
- Avon Park High School Baseball Stadium
- Avon Park Mowerplex
- Avon Park Senior Activities Center
- H.L. Bishop Park
- City of Sebring Lee Palmer Horseshoe
- Highlands County Convention Center and Fairgrounds
- Highlands County Multi-Sports Complex
- Highlands Hammock State Park
- Lake Istokpoga
- Lake Jackson and Sebring Waterfront
- Lake June Park Sports Complex

- Lake Placid High School
- Lakeshore Mall
- Max Long/YMCA soccer
- Pinecrest golf course
- Sebring High School Football Stadium
- Sebring International Raceway
- Sebring Recreation Club
- South Florida State College
- Sun ‘N Lake Golf Club
- Sun ‘N Lake Preserve

The Consultants reviewed several historical and internal documents including, but not limited to, the following:

- Highlands County Tourist Development Economic Tourism and Development Reports 2017-2018
- TDC Draft Marketing Plan & Budget 2019-2020
- Highlands County Tourist Development Council Strategic Plan & Conversation FY2020-FY2023
- STR Report September 2019
- Highlands County Tentative Softball Tournament Dates for 2020
- Highlands County Tourist Development Council Roster
- Highlands County Tourist Development Council Committees/Stakeholder Groups
- Highlands County Tourist Development Sports Marketing Expenditures 2016-2019

The audit was led by Huddle Up Group Founder + CEO, Jon Schmieder (Phoenix, AZ) and Director Caroline Allman (Denver, CO), with support from Director Eric Olson (St. Louis, MO). The audit focused on four (4) themes:

1. Facilities inventory and quality.
2. National best practices for sports tourism and events marketing with similar market characteristics.
3. Identification of the ideal structure for VS’s sports tourism efforts to be sustainable and effective into the future.
4. Collaboration opportunities that would enhance VS’s overall tourism results.

Discussions were held around national best practices in these theme areas and focus was given to applications for VS. The intent of this process was to create community support for VS’s increased sports tourism marketing and venue enrichment efforts by giving local stakeholders a voice, and to foster a teamwork mentality throughout Sebring.

The Consultant Team took the results from the phone and in-person interviews, as well as the data from the site visits to the Sebring area, then overlaid national best practices to develop and deliver the enclosed recommendations. These recommendations are intended to spark a dialog within the community’s leadership hierarchy in order 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 five (5) universal truths about the Sebring area's tourism and sports market position:

1. There is a desire to grow sports tourism in Highlands County.
2. The organizational structure for supporting sports tourism is not sustainable and warrants study to identify resources to drive sports tourism development.
3. A majority of the existing facilities that could host significant tournaments are not tournament ready.
4. With or without new or enhanced facilities, VS must build a sustainable sports tourism model that can drive increased visitation in the near term.
5. Collaboration opportunities exist with local partners that can align with VS's mission to expand its sports tourism impact.

Visit Sebring
Sports Tourism Assessment Project
SWOT Analysis

It is the opinion of the Consultant Team that there is an opportunity to grow sports tourism in Sebring. Through our extensive phone interviews, review of numerous historical documents, conversations with local event promoters and venue managers, and our knowledge of the national marketplace, we believe there is room for VS to deliver additional overnight stays to the destination through sports and events. An expanded sports tourism effort will lead to increased economic development and will positively impact the community over time.

In a market the size of Sebring, with its numerous positive attributes, it is critical that grassroots sports tourism as well as special events serve as tourism drivers for the local economy. Keeping grassroots sports tourism and events at the forefront of VS's objectives, below is a SWOT analysis of the current sports tourism efforts of VS. Each SWOT item features three key issues with no more than three action items for each ("Powers of Three").

Strengths

1. Collaborative Leadership – Highlands County has a solid mix of community leadership and the VS staff is well respected locally. Several survey respondents shared that they believed the VS staff was collaborative, responsive, and trying to do a lot with their limited resources. VS's stakeholders unilaterally support an increased emphasis on sports tourism and events marketing in the future. Any new development of the sports tourism market will require VS to find ways to continue partnering with the community's top organizations to build and grow events that will sustain tourism over time.
2. Destination Offering – Sebring offers event rights holders and visiting teams a hospitable and inviting family friendly community that is well situated to host state, regional, and select national level tournaments. The destination is safe, affordable, and geographically well positioned to access via ground. Sebring has a select inventory of sports market friendly hotels (600-700 usable rooms),

a good level of team friendly restaurants, and a select number of attractions in the area. All of these factors make Sebring a viable host site for tournaments and special events.

3. Waterways – While the Sebring area lacks many of the traditional sporting facilities communities use to drive tourism to their economies, the destination does have several water assets that can be leveraged to host events in the future.
4. Sebring Raceway/12 Hours of Sebring – This facility and event offer opportunities that other communities the size of Sebring often times do not possess. USA Today recently named the 12 Hours of Sebring the top motorsports race in the country. This facility can serve as the hub for other larger regional and/or national events or strategically created events in partnership with some of the area’s sports event promoters.

Weaknesses

1. Resources – At this time, VS’s sports effort is not adequately funded versus sports tourism organizations across the country. Most of VS’s competitors are operating with far more resources in the three key operational areas (funding, human capital, and physical venues). The most recent fiscal year’s sports budget is quite small (\$74,174 for FYE 2019) and doesn’t allow VS to lead a typical sports tourism marketing program. Drastic staff additions are not necessary, however a small enhancement to the staff in the area of servicing VS’s sports clientele would likely have positive returns very quickly. In addition, a sustainable funding model for developing and enhancing facilities and also attracting more events to the community is vital to the future growth of the sports tourism efforts in Sebring. Add to this that there are 28 established sports commissions in the State of Florida alone, including Palm Beach County (the reigning National Sports Commission of the Year). When these factors are put together, it is easy to see that VS’s competition is stiff.
2. Facility Challenges – While the Sebring area has a good amount of venues to use in attracting tournaments and events, the destination has very few anchor facilities that can be used to attract tournament play and their related tourism dollars.
 - a. Lack of an Indoor “Anchor” Facility – Sebring and the surrounding area has a very limited inventory of indoor venues that would be considered an “anchor facility,” meaning a facility that has enough fields/courts on its own to host major regional or national events. In addition, the public facilities visited by the Consultant Team were found to be in challenging condition, many in remote areas far from host hotels and attractions, and in general, not ready to host national level tournaments. In today’s sports tourism landscape, event rights holders are seeking communities that have these anchor venues to host their events. Without strong indoor options, Sebring will be fighting an uphill battle against communities with bigger and better venues. Without a new indoor facility on the drawing board, VS will have to focus its marketing efforts on the current outdoor venues that are available. Below is benchmarking information from a 2018 Huddle Up Group survey of over 300 event rights holders, outlining their ideal facility requirements.

Facility Type	Anchor	Tournament Friendly	Best In Highlands County
Flat Fields	Minimum 16 fields	8-15 fields	Highlands County Multi-Sports Complex 4 flat fields
Pool	50m/8-10 lanes with diving well	25m with diving well	None
Diamonds	Minimum 12 fields	8-11 fields	Max Long/YMCA 10 Diamonds
Hardwood Courts	Minimum 8 Basketball/ 16 Volleyball	4 Basketball/8 Volleyball	South Florida College 2 Basketball
Indoor Track	200 meter/6 lanes/banked	200 meter/6 lanes	None

3. Waterway Infrastructure – Noted above, the Sebring area has some excellent water assets that could be used to attract tournaments and their related visitors. However, most of these waterways have limited infrastructure around/to them that will challenge their ability to reach their full tourism potential. This includes aging (or non-existent) boat slips, limited parking at some sites, general water access points, lack of sight lines for spectators, and in most cases the absence of permanent infrastructure (restrooms, concessions stands, etc.).

Opportunities

1. Funding Mechanisms – There is not an abundance of funding mechanisms dedicated to destination development. The County’s 3rd Penny, the Fireman Fund, and the R-PAC recreation facility fund are good resources to lean into for new product development, however they likely will not provide enough funding over time if they stand alone as the sole mechanism for this purpose. In addition, the current Event Grant Program for tournaments of a certain size could potentially be revamped to drive more overnight stays to the region.
2. “Silent” Sports – Water based events, or “silent” sports, could offer new opportunities for VS given the vast resources in both lakes (98 in all) and the Sebring City Pier. Also, Lake Istokpoga was recently named a “Best Bass Lake of the Decade” by Bassmaster Magazine. This is an area where leisure travel marketing and locally created events, if planned out correctly, should deliver on VS’s sports tourism mission.
3. Unified Vision and Community Alignment – The long-term success of any tourism program for VS will depend on the engagement of partners throughout the region. A unified and successful tourism effort will require that resources and community support be offered by numerous stakeholders in the area (examples: various county parks directors, elected officials, venue owners/managers, various sports clubs, hospitality leaders, area schools, and the corporate community). Without a unified vision, it will be difficult to make a significant tourism impact on Sebring and Highland County. Using sports tourism to unify the community could prove to be a significant opportunity for VS and the area’s leadership.

Threats

1. Regional Competition – There are several competitors in Sebring’s geographic region that are well established in the national sports tourism space (see Appendix C). The high level of established competition from nearby communities is only the beginning (most notably Palm Beach County, Orlando/Kissimmee, and Polk County). There are several communities in the region that are currently expanding their sports tourism efforts. This growing competition makes it more difficult each day for Sebring to remain relevant locally, regionally, and nationally. While Sebring may not want to be “like” some of these communities, their presence in the sports tourism space will require VS to pick its proverbial spots and be smart about what its focus areas become with the very limited resources it has to work with today.
2. Deteriorating Facilities – In most cases, Sebring is behind its regional competitors in regard to facilities. Further, many of the facilities that do exist are aging and in need of upgrades. If this issue goes unchecked, it will not be long before some of the events that have historically been held in Sebring may look for better venues elsewhere. It is important that VS make the area’s elected officials aware of the value of sports tourism and what is at stake (in lost economic impact and tourism dollars) if long-term investment is not made into facility infrastructure.

Visit Sebring Sports Tourism Assessment Project Recommendations

The enclosed game plan includes recommendations for four (4) primary focus areas and two (2) secondary concepts for future consideration. The primary areas should be executed upon in the short-term, regardless of new resource acquisition or if a venue development/enhancement program is put in place. **The secondary recommendations are every bit as critical as the primary ones, however, will likely take more time and strategic planning to bring to fruition.**

Primary (Near Term)

1. Explore created sporting event opportunities.
2. Add bench strength to support current staff in sports marketing and business development.
3. Focus on sports facility enhancement.
4. Strengthen community alignment.

Secondary (Longer Term)

1. Develop a sustainable sporting venue funding source and expand business development efforts.
2. Collaborate to identify specific sports venue development opportunities.

Primary Recommendations

Primary Recommendation #1: Explore Created Events Opportunities

Noted earlier in the SWOT analysis, Sebring has a strong collection of successful locally based event promoters that have a track record of success creating and operating events (examples: Sebring International Raceway, Dixie Youth Baseball, Highlands Pedalers, Boomaxe, South Florida State College, Soda Festival, Avon Park Shuffleboard, and the local golf community). There is likely more opportunity to expand this effort to drive more overnight stays with increased support of these local event operators. Where possible, these success stories should be replicated to increase the inventory of locally developed events that would in turn, deliver increased overnight stays in Sebring. Locally “incubated” events are becoming more and more popular among destination marketing organizations (DMOs) and sports commissions. These events can help build a long-term presence that fill the calendar needs of the local hospitality industry, and drive business to the area year over year. Created events allow the managing entity (such as a local promoter in partnership with VS) to control not only where they fall on the calendar to maximize their impact, but also to take advantage of the profits from successful events. To support this effort, the current Event Grant Program should be re-evaluated to see if it can help facilitate the creation of new tourism driving events.

Action Items: Develop a contact list of all area/regional event rights holders and engage them in a conversation about (1) growth of their current events and (2) new event development. Revisit the existing Event Grant Program.

Primary Recommendation #2: Add Bench Strength for Sports Marketing and Business Development

Noted earlier in this report, VS does not have the resources to compete in the sports tourism market through traditional means. VS does however have the ability to add external resources in the form of human capital to focus on three key areas relating to sports tourism: (1) local communications and marketing, (2) new event creation and execution, and (3) national level marketing and business development, including responding to RFPs and bidding on events where appropriate. Partnering with an established sports tourism firm or individual that can provide VS “bench strength” in these areas is key to enhancing the current work of the organization. Also, aligning VS’s efforts with like-minded organizations such as the Florida Sports Foundation could add value as well.

Throughout the research process, the Consultant Team encountered instances where stakeholders (both internal and external) were unsure of the historical importance of sports tourism in Sebring. While this is very common in markets the size of Sebring, there is a good amount of education that needs to take place in the future. In order to provide specific context to areas where added “bench strength” would help VS going forward, the Consultant Team recommends three (3) action items to help improve VS’s messaging to both internal and external stakeholders:

1. Local Communications and Marketing – VS and its stakeholders, elected officials, and the hospitality community at large in Sebring would be well served by a session on the value sports tourism brings to the area today, and what it could drive to the area in the future. To deliver upon this message, the Consultant Team recommends VS undertake the following actions:
 - a. Value Proposition – Create an education campaign to roll out both internally and externally. This quarterly road show would be presented in a 60-minute coffee workshop format. VS sports staff would present on the value of sports tourism to the region and the opportunities available to Sebring in the sports and events marketplace. Presentations should be made to various community groups (examples: elected officials, chamber leadership, civic clubs, high school and collegiate athletic directors, hoteliers, restaurant association, sports venue managers, event owners, etc.). It is important to reiterate that VS staff utilize outside supporters (examples: VS board members, event rights holders when in town) as partners in these meetings in order to give these presentations third party validation.
 - b. Create Corporate/Hospitality “Forums” – Where the education campaign noted above is aimed at community groups, VS staff should also develop a channel to educate and engage the corporate communities in Sebring. The Consultants recommend the creation of a quarterly “6&6 Lunch”. These lunches employ six existing stakeholders (example: VS board members) to each invite one guest from the business community (six stakeholders, six guests, “6 & 6”) to attend an informative luncheon on the importance of tourism, sports and events, the work of VS in the sports tourism industry today, and the opportunity for partnership involvement.
 - c. Trumpet Successes – In all cases where VS is involved in the production of an event, the organization should make it a priority to promote the community impact of the competition/tournament. This promotion should be sent out via traditional and also social media outlets, to both media and non-media audiences. The information should include

economic impact data derived from the aforementioned DI tool. It is important that in this process, VS steer clear of the perception of taking credit for the event in total, and that the event rights holder or local promoter be included in the promotion process throughout. Further, an ROI should be calculated on the tourism spending return for every marketing dollar spent by VS (most destination marketing organizations, or DMOs, aspire for a 9-to-1 or better return on each dollar invested in tourism development).

2. New Event Creation and Execution – Noted in recommendation #1 above, creating new events in partnership with local promoters needs to be a long-term strategy for VS. However, it must be noted that creating events and then executing them are different things entirely. It is common that with both locally created events and with traditional bid-in championships that the hosting entity (in this case VS) offer game day support to the event rights holder or operator. The recommendation here for added “bench strength” would help alleviate this staffing gap and allow for the sports tourism program to be supported effectively in the near term.
3. Targeted Outreach – Most CVBs/DMOs and sports commissions work to generate business by attending travel industry conferences, conducting sales trips, and coordinating familiarization (FAM) tours. VS has traditionally attended a very limited number of sports trade shows and conferences. While VS should be represented at these trade shows where necessary, the Consultant Team recommends that the sports marketing budget be balanced between sports leisure travel, bidding on select regional/national tournaments, and new event creation. The Consultant Team believes the most sustainable business development opportunity for VS is to allocate a majority of its sports marketing funds to (1) launch locally created event products in partnership with VS’s local promoters, and (2) to develop ongoing leisure tourism campaigns for non-competition related sports travel. While traditional bid-in events should still be a strategy in certain situations, it should not be a primary focus for VS going forward.

Action Items: Identify a partner to assist the sports marketing efforts for VS. Explore membership with the Florida Sports Foundation. Create collateral materials for use at the coffee workshops, schedule one (1) coffee workshop for 2020, schedule one (1) “6 & 6” luncheon for 2020. Identify 2-3 outlets to publicize success in the sports tourism market, and who will be responsible for messaging to/through those outlets on a regular basis. Identify potential partners to add the recommended “bench strength” to drive the overall sports tourism agenda.

Primary Recommendation #3: Focus on Facility Enhancement

The Sebring area has several tournament friendly facilities, however, very few “anchor” venues that can stand on their own in hosting larger national level events. In addition, without a sizeable convention space that is sports friendly, the ability to drive overnight stays through hosting tournaments in the shoulder and off-peak seasons is challenging. Given these issues, in order to change this paradigm in the future, VS and its partners will have to formulate a facility development game plan and identify sustainable funding sources to leverage throughout this process. The key steps and recommended projects are noted below.

1. Venue Enrichment – Noted previously in this report, venue enhancement is critical to the long-term success for Sebring as a sports tourism destination. For VS to positively impact the area’s grassroots sports events community as well as its future sports tourism work, the organization and its partners must identify a funding mechanism for venue enhancement/development projects (see below). This

would include special projects needed to consistently land regional and national tournaments for the area, and to enhance the local user group's league and recreational play. The current needs for this fund would include, but are not limited to, the following projects:

- a. Enhancing Current Venues – Several venues in the Sebring area could use upgrades to help attract and retain more tourism driving events. Some of the facility enhancements outlined within this report are already being undertaken, such as the Sebring Waterfront. In addition, the current 3rd penny could likely fund some of the improvements suggested here and in Appendix D. The Consultant Team believes the best opportunities would include investment in the following five (5) venues:
 - Max Long Baseball Complex
 - Lake June Park Sports Complex
 - Sebring Recreation Club
 - Sebring Waterfront
 - South Florida State College

- b. Anchor Venue Inventory – The Sebring area currently has a limited supply of “anchor” venues that could be used to drive tourism to the destination. Many of Sebring’s regional competitors have significant indoor and outdoor multi-use sports facilities, including but not limited to the following:
 - Cape Coral Sports Complex – 9 diamonds/5 flat fields (Lee County)
 - Indian Trails Sports Complex – 10 flat fields/4 diamonds (Palm Coast)
 - International Polo Club & Village Park – 45 flat fields (Palm Beach)
 - Lake Myrtle Sports Park – 9 diamonds/11 flat fields (Polk County)
 - Ocala Rotary Sportsplex – 16 diamonds/5 flat fields (Ocala)
 - Premier Sports Campus – 22 flat fields (Bradenton)
 - Seminole County Sports Complex – 15 diamonds (Sanford)
 - Southside Sports Complex – 25 diamonds (Columbia County)

As a point of comparison, the two largest tournament quality diamond facilities in Highlands County have 10 and 5 fields, respectively. Similarly, the largest tournament quality flat field facility in the area consists of only 4 fields. National benchmarks for anchor facilities require a minimum number of 16 flat fields and 12 diamond fields to host significant sized events (see chart on page 7).

In addition, there are a few major national players/destinations that offer “best in class” facilities that Sebring may want to model themselves after in the future. These destinations include, but are not limited to the following:

- Champions Center (Appleton, WI)
 - Crossplex (Birmingham, AL)
 - Disney Sports Complex (Orlando, FL)
 - Elizabethtown Sports Complex (Elizabethtown, KY)
 - Grand Park (Westfield, IN)
 - Great Park (Irvine, CA)
 - Hoover Metplex (Hoover, AL)
 - Myrtle Beach Sports Center (Myrtle Beach, SC)
 - National Sports Center (Blaine, MN)
 - Rocky Mount Events Center (Rocky Mount, NC)
 - Virginia Beach Sports Center (Virginia Beach, VA)
- c. Venue Master Plan – Currently, there is not a region-wide facility master plan for the entire community. While some of VS’s stakeholders have master plans or facility enhancement concepts for their own organizations (examples: parks and recreation, individual cities, adjoining counties, high schools, and colleges), there is not a unified plan that traverses the entire community.
- d. Indoor Venues – Sebring is largely void of larger indoor spaces that can be used for tournament play. The existing facilities are highly specialized or small in number of playing surfaces in one location. It is likely that to grow the impact of sports tourism in Sebring, new indoor multi-use facilities will need to be constructed, and an investment in athletic equipment would need to be made in the form of sports tournament-specific items (examples: sport court, basketball baskets, volleyball nets, pickleball net systems). As tournament opportunities arise, a venue enhancement fund would need to be available to be tapped into to pay for these equipment upgrades. These purchases can be used for years into the future to expand Sebring’s reach into the fastest growing indoor sports, and to diversify beyond the traditional competitions. The ability to host indoor events could also strengthen tourism in the shoulder season and off-peak months. The growing sports opportunities could include:
- Pickleball – USA Pickleball’s membership has grown 12-fold in the past

five years.

- Cheer and Dance – 1.6 million core participants engaging in the sport at least 13 times per year.
- Mixed Martial Arts (MMA) – Core participation in MMA competitions is up 77% over the past three years, totaling nearly 1.3 million athletes.
- Additional Growth – Boxing and roller hockey also offer a significant growth market in the indoor sports space, rising in core participation 41.4% and 39.5% since 2012, respectively.

An investment in this equipment could also allow for VS to host many of the larger more traditional and established sports competitions, including:

- Basketball – 15.6 million people in the United States are considered core basketball players, participating in the sport 13 or more days per year.
- Volleyball – Has a core audience of nearly 3.6 million people.
- Indoor Soccer (Futsal) – Over 2.6 million core athletes participating 13 or more times a year.
- Archery – Core athlete participation in archery (26 or more days per year) is up 8.1%.*

* – The statistics noted above were obtained from the Sports & Fitness Industry Association’s annual sports participation report. The study measures participation changes over one, three, and five years.

Action Items: Begin to develop a region-wide facility master plan by pulling in each of the independent master plans that may already be in place (examples: parks and recreation, soccer complexes, cities, counties, school districts, colleges, private facilities). Identify areas of need, their costs, and potential impacts. Develop a digital regional venue guide to be used during the solicitation process at national trade shows. Plan and execute a stakeholder field trip(s) to a top-tier indoor sports facility such as Myrtle Beach, Rocky Mount, Virginia Beach, or Hoover Metplex.

Primary Recommendation #4: Strengthen Community Alignment

There is an opportunity for VS to utilize this enhanced sports tourism effort to build bridges in the community. As noted above, relationships can be enhanced with the area’s local event promoters and venue leaders, however there is additional opportunity to build relationships with the corporate community as well. One specific area where VS can enhance its relationships across the Sebring region would involve the creation of an awards event to recognize the work of sports community leaders in Sebring. This program could be one of the primary responsibilities of any external supporting entity that is brought on board, along with support of the existing staff. In addition, within the daily operations of VS sports team, there are a handful of particularly important stakeholder groups that the Consultant Team believe would benefit from additional (and intentional) outreach on an ongoing basis:

1. Area Event Owners/Promoters – There are several organizations in Sebring that have a long history of executing room night driving events. It is in the best interest for VS to work in a unified manner to help these entities grow their current events and to support them in building new assets where these events align with VS’s tourism-based mission. Specifically, enhancing the grant fund to support these organizations would be a positive step. Also, creating an ongoing outreach program directed at these groups would offer more consistency in communications and would build relationship bridges that can be activated upon in the future. Finally, the Consultant Team believes the overall event support program should be streamlined as some tournaments at the Highlands County Multi-Sports Complex have gone directly to the TDC without the involvement of VS. Aligning all of the sports related requests, and the various requirements for funding, into one program would be beneficial in the future.
2. Area Schools – During the research process and site visit it became apparent to the Consultant Team that there are partnership opportunities with the area high schools and colleges to create/host events. It is recommended that VS make it a point to establish a relationship and regularly reach out to key contacts to maintain a dialog for future conference event hosting opportunities. In addition, for a smaller school like South Florida Community College, it is likely that they have limited staff infrastructure that can get overextended relatively easily. For these smaller schools there is an additional opportunity to potentially plant VS sports interns in their athletic departments to help them facilitate their events when thrust into hosting on campus. This program would help augment the small staffs at these schools and would help VS build stronger partnerships with these institutions that could lead to more event hosting conversations in the future. Lastly, the creation of a sports-specific visitors guide for teams coming to compete against Sebring area schools (both high school and college) could help capture room nights that at this time are transient in nature.
3. Marketing of Current Facilities – During the exploration process the Consultant Team experienced some confusion as to how some of the existing facilities are booked (or not booked) effectively. VS should work with its existing venue managers to review how each venue is currently marketed, what booking procedures are in place, and how to get the best return on investment for each facility in the region.

Action Items: Put in place a consistent partner outreach program such as the “4 Touch Rule.” Set partnership meetings with each of the area conferences and schools to establish a dialog and generate ideas that would elevate the partnership with VS. Create a digital visitor’s guide for teams coming to compete in Highlands County at the high school or college levels. Add a sports tourism award to VS’s new tourism awards program. Review marketing and booking procedures with each venue owner/manager in the region.

Secondary Recommendations

In the near term, VS will have to grow the sports tourism market with the assets it currently has available to them (financial, physical, and human capital). The natural progression of success would include facility enhancement and development to improve the destination offering and drive more overnight stays through sports. Without a large inventory of “anchor facilities”, and a small handful of venues that can be improved to become more significant tourism drivers, a longer-term vision will need to be placed on venue

development for Sebring. Looking at the long-term sports tourism needs of the region, the destination will need to identify a facility funding source to use as well as create a plan to enhance existing facilities.

Secondary Recommendation #1: Develop a Sustainable Venue Funding Source

In order to enrich the destination's venue mix, VS and its tourism partners would need to identify a sustainable funding source to help activate these venue improvements. Numerous markets across the country have implemented a dedicated tourism-based revenue source to enhance their sports facilities. These taxes are most commonly a hotel occupancy tax or a food and beverage tax that are 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 C. Should such a tax, or another funding source be identified, the Consultant Team has outlined below how such a funding model could work for VS and its sports tourism program:

1. Sports Development Fund – Identifying a dedicated funding source for the venue projects noted above, and those opportunities that may arise in the future, is critical for VS to grow its sports tourism market. The national best practice for the activation of these newly identified funds would be 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 for capital projects that would drive overnight stays to the Sebring area. For every dollar the partner invests, they would be eligible for a dollar from the VS Sports Development Fund (or similar working name). Employing this type of a 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. In addition, effective use of these funds to drive more overnight stays would subsequently increase the impact of tax collections by these additional visitors. Finally, should this fund be put in place VS should tie all grants to the concept of “Favored Nation Status”, meaning VS would have a higher booking priority than most if not all other organizations due to its investment in a given facility.

A major point of note, numerous cities are increasing their bed tax rate and/or using a food and beverage tax to put towards the construction and/or operation of new sports facilities. In nearly all of these cases, the taxes generated to enhance/build these facilities is to drive incremental overnight stays for the destination. The most common funding mechanisms the Consultant Team has seen implemented for sports facility development nationally include:

- Hotel/bed taxes
- Prepared food (restaurant) taxes
- Sales taxes
- Tourism Improvement Districts (TID)

The current TDC Asset Development Fund tax (the 3rd penny) generates roughly \$250,000 annually, which is likely needed for more than just sports venue projects. This funding mechanism could be generating enough revenue to make enhancements to current facilities, however new venue development will necessitate an additional (larger) funding source. As of January 31, 2020 the 3rd penny account had a fund balance of \$368,000, which is not enough to significantly impact the

development of new tourism driving sports venue assets. Ideally, a larger sports venue development fund would be sustained through some or all of the above sources year after year.

Action Items: Identify new potential funding sources to support facility development and/or enhancement that will complement the current 3rd penny. Add to any facility development partnership program a requirement for VS to issue hotel leads for all facilities receiving a grant and also add a requirement for facility use by VS at discounted rates or at no cost for a specific number of events each year.

Secondary Recommendation #2: Collaborate to Identify Specific Development Opportunities

Noted previously in Primary Recommendation #3 above, developing a regional view of facility enrichment and development will be key for the destination to identify areas of long-term opportunity. Once this list is developed, each potential project should be prioritized by its potential to drive new overnight stays to Highlands County. At that point, specific conversations with key stakeholders should be had to determine what projects are viable and how VS can prove to be a catalyst for those projects that rank highest to go from “concept to concrete”.

Action Items: Prioritize the facility enhancement/development list by their potential to drive tourism to Highlands County. Start high level conversations with key partners on each project, starting with those that have the highest probability to drive tourism dollars into the community.

Conclusion

Sports tourism is a \$1.41 trillion industry worldwide, and is projected to grow to \$5.72 trillion by 2021, according to the media and entertainment research firm Technavio. A study by SportsETA (formerly the National Association of Sports Commissions, or NASC) states that the grassroots portion of the domestic sports tourism industry is responsible for over \$15 billion annually. Sports is big business, and the competition has never been more fierce. There are more communities targeting the sports market than ever before. In order for Highlands County to be relevant in this niche market, VS must build bridges with key players locally to pave the way for an enhanced organizational model that is focused on community partnerships to drive a sustainable sports marketing program. By forging this path, VS will position Sebring as a strong player in the sports tourism industry, that will be able to provide value to its stakeholders in a meaningful way year over year.

Sebring has had some success in hosting sporting events and tournaments over the years. The Consultant Team believes there is additional opportunity for VS and its partners to grow the impact of sports and events tourism in the future. To frame up this vision, the Consultant Team offers four “Big Ideas” for Sebring:

1. The VS team needs to be intentional about how it plays the sports tourism game. Sebring cannot play the same game that its more well-funded and experienced competitors play. Most of VS’s competition have superior venues and more human and financial resources at their disposal. To be successful in the short term, VS has to play its own style of sports tourism game with the assets that are currently available.
2. There are several opportunities to leverage today. VS can work with its local event promoters to create small opportunities year over year, with a vision for the longer term. In order for VS to seize

these opportunities, VS team (current staff and any added “bench strength”) will need to be intentional about an increasingly external focus towards its local event partners and venue stakeholders.

3. Community leaders shouldn’t let facility discussions get in the way of blocking and tackling sports tourism efforts that can happen now. There are opportunities to be had, even if new resources or venues don’t materialize.
4. The end goal should be for VS to become the “go to” organization that the community can lean on for all sports tourism related issues/opportunities (example: be in a position to take on a leadership role with area promoters to remove barriers for them to create tourism driving products such as a golf week or an international cycling event).

VS and its partners can achieve tourism growth in Sebring through the empowerment of local event promoters/operators to create and grow home-grown grassroots events, develop new event and venue products, and host bid-in state/regional/national championships when necessary. In order to really make an impact on Highlands County, its businesses, and even more importantly its citizens, VS needs to focus its efforts on three (3) overarching objectives:

1. Create a culture of development. Develop new events, develop human capital, develop relationships to increase collaboration, and develop physical products (venues) when resources become available.
2. Partner with local promoters to build created events that will call Sebring home long into the future that will not be subject to an RFP process with VS’s competitors.
3. Make the long-term enrichment of Sebring’s venue “tool kit” a priority, by leading a community-wide discussion that focuses on the future vision of the community through a sports tourism lens.

In order to pursue some of the “Big Ideas” and objectives laid out above, especially those relating to facility development, VS would need to identify a new and sustainable funding source. To be effective in the near term with its current resources, VS needs to be strategic in how it promotes the destination. In the future, VS must pick up the ball and create an empowering environment for its local event promoters (hosting tournaments) and community partners (venue development) to build a foundation for long-term success.

Specifically, VS’s sports effort should focus its resources on three (3) initiatives (or “Pillars” as outlined in Appendix H). Each Pillar has a specific target audience, as well as tactics to achieve VS’s tourism goals for each area. The Pillars are meant to be simple and clarifying, so both internal and external stakeholders can easily understand the mission and goals of VS and an enhanced sports tourism effort. The Pillars include the following three (3) focus areas:

1. Drive an agenda of newly created sporting events to enhance tourism and overall business development. Examples could include:
 - Creation of a signature golf event, such as the Citrus Trail Golf Tournament concept.
 - Align with the two area shuffleboard clubs that are members of both the Florida Shuffleboard Association and the National Shuffleboard Association.
 - Work with the area’s baseball and softball clubs to help them promote their events to increase the number of teams that travel to the market and play in their tournaments.

2. Create a funding source to drive facility enhancement (existing venues) and development (new venues). Examples could include:
 - Lake/fishing infrastructure enhancements – This should be fairly cost effective with a good ROI, and would be targeted at a sport group (anglers) that match up favorably with VS’s tourism goals.
 - Sebring International Raceway (SIR) land development – There is a flat plot of land at SIR that could be converted into a large open flat-field multi-use area. This space is large enough to accommodate nearly any field size and could alternatively be the site for large festivals or concerts. The overall project may take significant funding, however the current third penny could be the catalyst for new development at this site.
 - Enhancements to the Lake June Park Sports Complex and/or Max Long/YMCA Soccer – Of the existing complexes, the Consultant Team believes these two have the greatest potential to drive new business to the region.
3. Create a pipeline for consistent communication with all of VS stakeholders. Specifically, VS should implement the following tactics:
 - Monthly email newsletter to area venues and event promoters.
 - Quarterly “6&6” Lunch.
 - Integration of a sports tourism category into VS’s existing Tourism Awards Program.
 - Regularly issued press releases when hosting tourism driving sporting events.
 - Implement a tracking program such as the “4 Touch Rule” to ensure regular communication with key stakeholders.

The unprecedented growth of the sports tourism industry shows the high level of market sustainability that support the expansion of economic development in this space for Sebring (see Appendix A). The recommendations suggested here will positively affect the region’s tourism profile and also positively impact the citizens and community user groups on a day-to-day basis.

Throughout this project, subjects expressed a desire for community leaders to work together. There is a great deal of support for VS to expand its reach in the sports tourism space. With that in mind, there is an opportunity for VS to be the connection point in sports tourism through the enhancement of its current sports marketing efforts, that can lead the charge in the creation of new event and venue products. This investment will, in turn, help drive economic development year over year long into the future.

As in any new project, there are numerous variables that would need to be considered in evaluating the ROI and risk in expanding the community’s sports tourism program, including work towards the development of new venue assets. It is the experience of the Consultant Team that the communities who consider the overall impact on their tax base as a whole, will have more success than those that measure success purely by room nights or bed tax collections. That is, the cities that take into account the entirety of the community impact and total economic activity that is generated by a sports tourism marketing program, generally display a higher level of collaboration than those that simply measure heads in beds and sales tax totals.

In summary, the Consultant Team offers what we feel are the four (4) most important things for VS to facilitate in the immediate future:

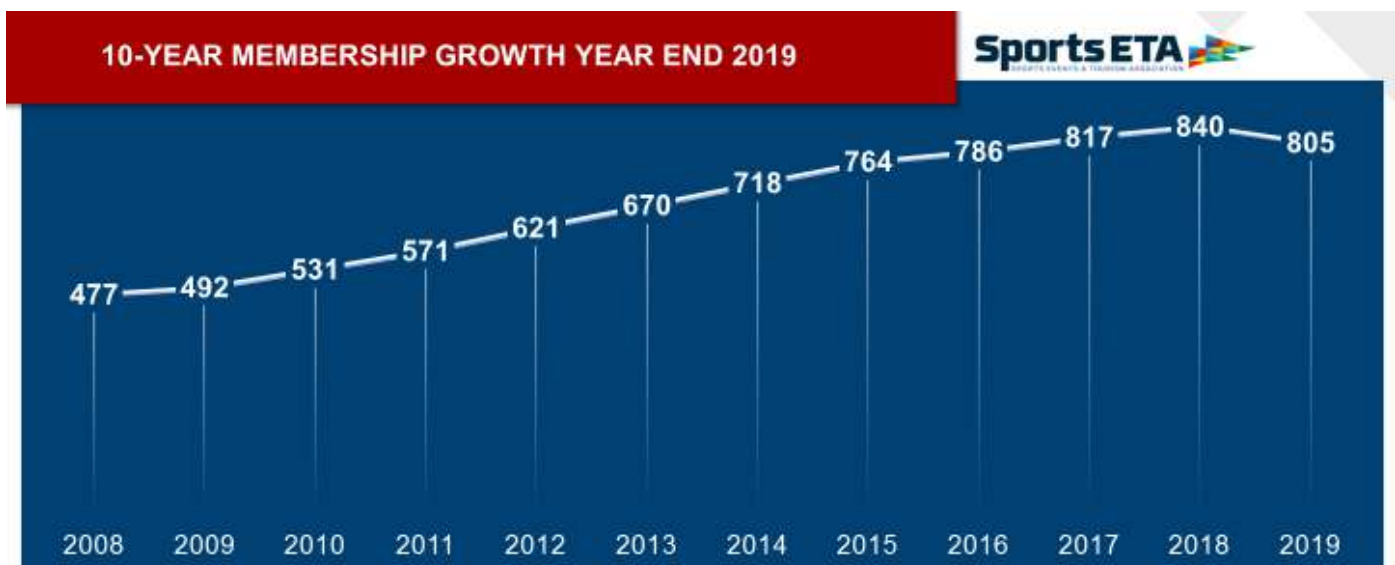
1. Meet with the leaders of the region's top tournaments and special events to identify areas where the sports tourism initiative can partner with them to enhance their existing properties, and potentially create new ones. Engaging local promoters in the event development process to create more owned event assets will have positive long-term effects on the community, including lessening the dependency on bid-in events and transient/corporate tourism.
2. Develop a sports venue enhancement wish list, along with projected budgets for the desired improvements. Prioritize those improvements in order of those that will drive more overnight stays to Highlands County, and formally adopt the list of enhancements as a long-range improvement plan (with or without an identified funding source).
3. Determine potential funding pathways for sports facility development and enhancement. Further, identify what each option would generate and what percentage of those funds would be attributed to this expanded sports tourism effort and also to other tourism driving programs through VS.
4. VS needs to add sports-specific human capital ("bench strength") to allow it to become more externally focused in developing and growing local, regional, and national relationships tied to the sports tourism market. Consistency in outreach to leading industry stakeholders will be the key to success. In the near term, we suggest more time from the current staff be allocated to sports tourism, and in the future, the potential addition of a dedicated sports marketing staff person or agency of record to carry out the enclosed recommendations.

In the eyes of the Consultant Team, the puzzle pieces exist to expand economic development for the region through sports and special event activities. The only question would be to what extent this development effort can be supported financially in order to best benefit the destination. The Consultant Team believes it is within the power of VS and its stakeholders to capture more opportunities in the sports tourism and events market, while also enriching the lives of its citizens. This community-wide effort will help Visit Sebring lead the tourism and business communities in an ongoing and proactive manner into the future.

Appendix A – SportsETA Membership

Sports tourism has grown exponentially over the past two decades. The nature of the industry is that it is relatively “immune” to market factors such as troubled economies, war, high unemployment, 9/11, or similar factors. Studies by SportsETA show that the grassroots sports tourism industry is worth over \$15 billion and that there are more events today, with more participants competing in those events, than ever before.

Projections indicate that the grassroots sports tourism industry (exclusive of mega events like the Superbowl, Final Fours, etc.) is growing at a pace of 12-14% per year, with more growth anticipated in the coming decade. Below is a chart outlining the growth of membership organizations within SportsETA, which is a direct correlation to the growth of the sports tourism industry as a whole.

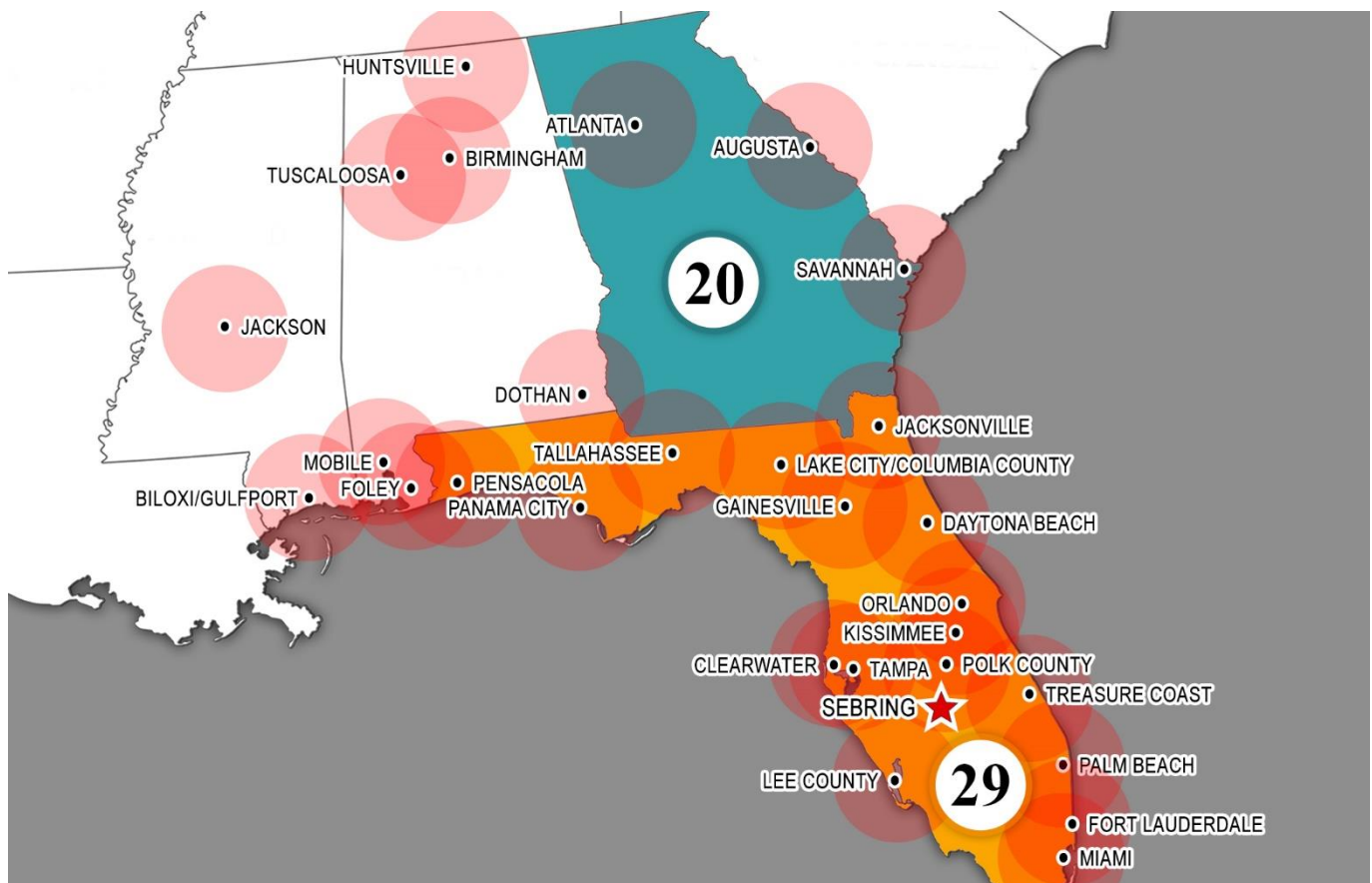


Appendix B – Visit Sebring Competition Map

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

Below is a visual representation of the various entities in Sebring’s geographic region that are active in the sports tourism and events space. The red circles surrounding each city represent a 100-mile drive market for local and regional events. The circles containing numbers indicate how many active sports tourism organizations (CVBs, DMOs, or sports commissions) exist within those individual states.

While 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 C – 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). Although the level of success is yet to be determined, 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 which is currently under construction.
- 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) recently 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. This facility opened in October of 2019.
- Placer Valley (CA) allocated funds from an increased bed tax as well as a new hotel assessment to construct a \$35 million multi-use all turf sports complex. The 22-field venue opened in 2018 and is managed by the area's tourism bureau.
- 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 C (Continued) – Trends in Sports Facility Funding

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 Miller Park, 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 D – Visit Sebring Venue Summary

Overall, the Consultant Team found very few “anchor” facilities in Highlands County. Below is a list of all venues evaluated by the Consultant Team along with areas of enhancement needed for each. The Consultant Team rated each facility on its current quality (CQ) and what the potential future quality (PFQ) likely could be if upgrades were made to the venue. The rating system used the following color codes:

Anchor Facility
Tournament Friendly
Not of Tournament Quality

Facility	Description	CQ	Comments	PFQ
Ag Center Arena	One small outdoor rodeo 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.	
Avon Park High School	1 grass football field, outdoor track, outdoor pool, 1 softball diamond, and 6 tennis courts.		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.	
Avon Park High School Baseball Stadium	1 high school baseball stadium and 2 youth baseball diamonds.		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.	
Avon Park Mowerplex	Lawn mower racing track.		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.	

Appendix D — Visit Sebring Venue Summary (Continued)

Facility	Description	CQ	Comments	PFQ
Avon Park Senior Activities Center	22 shuffleboard courts.		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.	
H.L. Bishop Park	Lake front park.		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.	
City of Sebring Lee Palmer Horseshoe	18 horseshoe pits.		These horseshoe pits are not of great quality. The addition of wood backboards, permanently mounted stakes, and additional parking would add value.	
Highlands County Convention Center and Fairgrounds	28,000 sq. ft. multi-purpose box with seating for 2,200 in retractable bleachers. Baseball stadium and football stadium on the grounds.		This 28,000 square feet 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.	

Appendix D — Visit Sebring Venue Summary (Continued)

Facility	Description	CQ	Comments	PFQ
Highlands County Multi-Sports Complex	5 diamonds, 4 flat fields.		This complex with 5 diamonds and 4 flat fields is a very nice facility. The playing surfaces are high quality with lights and covered dugouts. The addition of foul ball netting would be beneficial to the safety of spectators at the facility. The concessions, restrooms, meeting, and press box facilities are of great quality. The flat fields have high quality surfaces. A downside of the flat fields is that only one 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 adventitious for the local hospitality industry.	
Highlands Hammock State Park	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.	
Lake Istokpoga Park & Windy Point Park	Fishing lake.		This bass lake has a good history of hosting events and was recently names 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.	
Lake Jackson and Sebring Waterfront	Large lake.		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.	

Appendix D — Visit Sebring Venue Summary (Continued)

Facility	Description	CQ	Comments	PFQ
Lake June Park Sports Complex	Multi-sport facility with 5 diamonds, 1 dream field, and 3 full-size flat fields.	Yellow	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.	Green
Lake Placid High School	1 grass flat field with lights, scoreboard, and track; 1 baseball diamond.	Red	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.	Red
Lakeshore Mall	Aging retail space with increasing vacancies.	Red	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.	Yellow
Max Long/YMCA Soccer	10 diamonds, 1 flat field.	Yellow	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.	Green

Appendix D — Visit Sebring Venue Summary (Continued)

Facility	Description	CQ	Comments	PFQ
Pinecrest golf course	18-hole golf course with a driving range, short-range practice area, and putting green.		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.	
Sebring High School Football Stadium	Grass field stadium with lights, scoreboard, and 6 lane track.		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.	
Sebring International Raceway	Road course auto racing facility.		This established facility is an excellent tourism asset. The venue is setup 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 has the potential to be developed into various flat field sports facilities.	
Sebring Recreation Club	36 shuffleboard courts - 16 outside, 20 covered.		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 assets.	

Appendix D — Visit Sebring Venue Summary (Continued)

Facility	Description	CQ	Comments	PFQ
South Florida State College	Baseball stadium, softball stadium, 6 tennis courts, swimming pool, indoor gymnasium, outdoor volleyball courts.		There are multiple sports elements on campus. The baseball and softball stadium 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 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. The gym is a good multi-purpose space but does not have enough courts for tournament play. There are ample auxiliary rooms and parking for events and tournaments.	
Sun 'N Lake	Golf course with 36 holes, short-range practice area, 2 putting greens, 4 tennis courts, and 8 pickleball courts.		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.	
Sun 'N Lake Preserve	Off-road bike trails.		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 marketing as a leisure sports venue.	

Appendix E – Summary of Activation Actions

Primary Recommendations (Near Term)

Develop a contact list of all area/regional event rights holders and engage them in a conversation about (1) growth of their current events and (2) new event development. Revisit the existing Event Grant Program.

Identify a partner to assist the sports marketing efforts for VS. Explore membership with the Florida Sports Foundation. Create collateral materials for use at the coffee workshops, schedule one (1) coffee workshop for 2020, schedule one (1) “6 & 6” luncheon for 2020. Identify 2-3 outlets to publicize success in the sports tourism market, and who will be responsible for messaging to/through those outlets on a regular basis. Identify potential partners to add the recommended “bench strength” to drive the overall sports tourism agenda.

Begin to develop a region-wide facility master plan by pulling in each of the independent master plans that may already be in place (examples: parks and recreation, soccer complexes, cities, counties, school districts, colleges, private facilities). Identify areas of need, their costs, and potential impacts. Develop a regional venue guide to be used during the solicitation process at national trade shows. Plan and execute a stakeholder field trip(s) to a top-tier indoor sports facility such as Myrtle Beach, Rocky Mount, Virginia Beach, or Hoover Metplex.

Put in place a consistent partner outreach program such as the “4 Touch Rule.” Set partnership meetings with each of the area conferences and schools to establish a dialog and generate ideas that would elevate the partnership with VS. Create a digital visitor’s guide for teams coming to compete in Highlands County at the high school or college levels. Add a sports tourism award to VS’s new tourism awards program. Review marketing and booking procedures with each venue owner/manager in the region.

Secondary Recommendations (Longer Term)

Identify new potential funding sources to support facility development and/or enhancement that will complement the current 3rd penny. Add to any facility development partnership program a requirement for VS to issue hotel leads for all facilities receiving a grant and also add a requirement for facility use by VS at discounted rates or at no cost for a specific number of events each year.

Prioritize the facility enhancement/development list by their potential to drive tourism to Highlands County. Start high level conversations with key partners on each project, starting with those that have the highest probability to drive tourism dollars into the community.

Appendix G – Visit Sebring Sports Tourism Index© Results

Visit Sebring



Final Score

21.48

Tier 3

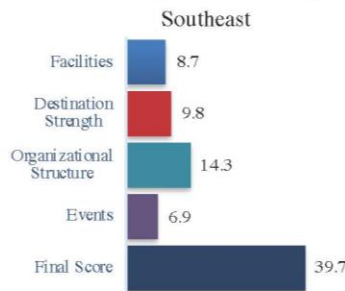
SPORTS TOURISM INDEX REPORT

Market Size: Small-Market
 Organization Type: CVB
 Geographic Region: Southeast
 Sports Budget: 0-500

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. However, there is an established hospitable community for leisure travel that could potentially be replicated for sports.

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. Established events like the 12 Hours of Sebring can be leveraged as a success story to try and replicate with other sporting events. 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 F – Pillars

In the future, Visit Sebring’s enhanced sports tourism effort should sharpen its focus on three (3) key mission areas, or “Pillars.” Each Pillar is driven by a different audience, all focused on increasing overnight stays and consumer spending in the Sebring area. This refined focus will help VS enhance its messaging and will deliver directly on the organization’s tourism mission, as well as positively impact the community’s sports groups. The recommended Pillars are below along with their driving audiences/factors.

Visit Sebring Sports Tourism Market 5-Year Strategic Mission Pillars			
Pillar	Created/Incubated Events + Business Development (Short-Term)	Facility Funding Facility Development Facility Enhancement (Long-Term)	Community Engagement (Ongoing)
Audience	Tourism Economic Development Rights Holders/NGBs Local Promoters Colleges/Universities	Venue Managers Hospitality Leaders Elected Officials Economic Development Colleges/Universities Cities/Counties	Elected Officials C-Level Leaders Local Media Non-Profit Civic Groups Hospitality Community Schools/Colleges
Tactics	Strengthen Organization Dedicated Sports Staff Expand Grant Program Grow Existing Events Incubate New Events Engage w/Bid-In Events	Venue Needs Master Plan Digital Facilities Guide Venue Development Fund Funding Source(s) Defined Prioritize Projects Field Trip	Staff Outwardly Focused “6&6” Lunches “4 Touch” Program Economic Impact Releases