

**COLUMBIA COUNTY BOARD OF COUNTY COMMISSIONERS**  
**POST OFFICE BOX 1529**  
**LAKE CITY, FLORIDA 32056-1529**

**COLUMBIA COUNTY SCHOOL BOARD ADMINISTRATIVE COMPLEX**  
**372 WEST DUVAL STREET**  
**LAKE CITY, FLORIDA 32055**

**SPECIAL MEETING/WORKSHOP**  
**AGENDA**

**MAY 18, 2017**

**3:30 P.M.**

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**Invocation (Commissioner Everett Phillips)**

**Pledge to U.S. Flag**

**Approval of Agenda**

**John Schmieder & Gary Alexander, Huddle Up Group**

**(1) Sports Tourism/Marketing Strategic Planning Project**

**Open Public Comments to the Board – 2 Minute Limit**

**Staff Comments**

**Commissioners Comments**

**Adjournment**



**Columbia County Sports Commission**

**Sports Tourism/Marketing  
Strategic Planning Project**

**Final Report Submitted: March 26, 2017**

March 26, 2017

Paula Vann  
Executive Director  
Columbia County Tourist Development Council  
P.O. Box 1847  
Lake City, Florida 32056

Dear Paula,

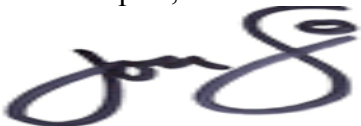
Thank you for your efforts on our recent work in Columbia County. Your team has been quite helpful and very responsive throughout this process. The groundwork we have set with your stakeholders will serve as a tremendous foundation for future sports tourism, event, and venue development efforts in the region.

Enclosed is the report detailing our findings. The report includes a SWOT analysis of the sports tourism efforts of the Columbia County Tourist Development Council/Sports Commission, as well as recommendations for future sports tourism development. Both the SWOT analysis and the recommendations are built on a “Powers of Three” format (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 our community meetings in May. We are looking forward to our follow-up discussions and final presentations.

Thank you again for all your support throughout this process!

Yours in Sport,

A handwritten signature in blue ink, appearing to read 'Jon Schmieder', with a stylized flourish at the end.

Jon Schmieder  
Founder + CEO  
Huddle Up Group, LLC

**Columbia County Sports Commission  
Sports Tourism/Marketing – Strategic Planning Project  
SWOT Analysis**

It is the opinion of the Huddle Up Group (“Consultant”) that there is an opportunity to continue to expand the sports tourism work of the Columbia County Sports Commission (“CCSC”). Through our extensive phone interviews, conversations with several events rights holders, and our knowledge of Columbia County and national marketplace, we believe there is room for the CCSC to deliver additional overnight stays to the destination through sports. An expanded sports tourism effort would lead to increased economic development, and will positively impact the community over time. In a market the size of Columbia County, with its numerous positive attributes and the current absence of a convention center, it is critical that grass roots sports tourism and events continue to be a top priority. Below is a SWOT analysis constructed by the Huddle Up Group. Each SWOT item features three key issues with no more than three action items for each (“Powers of Three”).

Strengths

1. Community Leadership – It was clear to the Consultant Team that Columbia County’s sports and tourism leaders work well together. Every person we encountered had a community-first mindset, which makes positive change in sports tourism (and other areas) viable for the future. The community leaders we interviewed were unanimously supportive of an expanded sports tourism program. In addition, there are also sports industry leaders in the area that are connected regionally and nationally (example: USSSA leadership) as well as a solid foundation of local promoters that can build locally owned events (examples: Florida Gateway Community College, Half Mile Timing, Suwannee Bicycle Association). The key for the CCSC will be to find ways to continue to partner with, and enhance the existing efforts of, these sports event leaders.
2. Destination Offering – Columbia County offers rights holders an inviting community that is event friendly to conduct regional and national championships. Lake City’s location near Interstates 10 and 75 offers convenience to the drive market, and its proximity among several larger cities (examples: Jacksonville, Orlando, Gainesville, Tallahassee) allow for teams throughout Florida to easily travel to Columbia County. The weather in the region is a positive attribute for tournament organizers as are the number of quality venues (baseball/softball) that are clustered in one location.
3. Facilities I – The Consultant Team found the venues in the area that are used to host grass roots participant driven tournaments to be quite a bit better than anticipated. There are more quality baseball and softball fields (25) at one venue (Southside Sports Complex) than in most markets two to three-times Columbia County’s size. The Southside Sports Complex offers up a multitude of fields to host both local community play and competitive tournaments at the same time. The Fort White Sporting Complex is a solid

overflow venue for the larger baseball and softball tournaments and could serve as the host site for smaller events. Alligator Lake offers several courses ideal for varying lengths of cross country races.

### Weaknesses

1. Facilities II – While the Southside venue has the ability to be a differentiator for the Lake City area, there are some issues regarding this facility and additional venues in the region as it relates to their use for regional and national tournaments. These issues include, but are not limited to, the following:
  - a. Lack of Indoor Facilities – Columbia County lacks a significant indoor space to use in attracting sports tournaments. This can be overcome with the enhancement/expansion of the existing outdoor facilities, so long as those improvements are made with a vision to grow tourism during shoulder and off-peak seasons (November to March).
  - b. Limited Multi-Use Fields – Lake City and the surrounding area have a very limited inventory of flat multi-use fields. In addition, the fields that do exist are largely controlled by the local soccer association and are difficult to book for non-soccer activities such as lacrosse, ultimate, field hockey, tackle and flag football, etc.
  - c. Infrastructure – Several of the existing venues in the region need upgrades. Some fields at the Southside facility are in need of permanent lighting. The Fort White Sporting Complex is soon to get permanent bathrooms, but could also use some additional parking lot work, enhanced spectator seating, as well as lighting on some fields not currently illuminated. The multi-sport fields at Southside are limited in number, and lack much of the basic infrastructure needed to host larger regional and nationally sanctioned tournaments.
  - d. Accessibility – The current management model for some of the venues in Columbia County can be a hindrance to hosting outside tournaments and events. Specifically, the user contracts with some of the community groups could be interpreted to give the club final say in the scheduling of the venue. While the Consultant Team believes the County has the final say under the current agreements, precedent has been set that the managing clubs hold that power. These clubs are often so busy with their own local programming, that they deem the venues inaccessible for the CCSC to use in hosting championships. A strategic discussion with each of the venue owners and managers in the region should be had to find spots in the calendar where both the host venues and the hospitality community could benefit.

- e. Calendars – Currently the CCSC does not have the same level of access to all area venue calendars. The CCSC staff is tasked with booking events that drive increased tourism revenues in off-peak and shoulder seasons. In order to achieve maximum impact, the CCSC sales staff needs to be able to consistently review where the community’s venues have open dates and then attempt to book new events in those open windows. Some form of a regularly shared venue calendar/process would be advantageous for the CCSC sports staff going forward.
2. Staffing – The CCSC/TDA staff position dedicated to sports tourism sales and marketing is currently vacant. In the challenging sports tourism marketplace, and with numerous sports commissions in Florida (27) competing for this business, it is imperative the CCSC to fill this staffing gap in the near future.
3. Hotels – The existing hotel inventory can present issues on two fronts: (1) of the 1,600 available rooms, approximately 800 are rooms that are suitable for visiting tournament teams, and (2) in situations where the County is hosting multiple events at the same time a significant compression can occur, driving rates far above the level that traveling teams are used to paying. Additional hotels that are coming on line will help with these issues, particularly those that are of a select or full-service quality.

### Opportunities

1. Community Engagement – Through an enhanced sports tourism program, the CCSC will have a tremendous opportunity to continue to grow its connection to the community. Specifically, the CCSC can use this revamped sports tourism initiative to galvanize area leaders in the following ways:
  - a. Education – Sports tourism has had a positive impact on the Columbia County marketplace for many years. The Consultant believes there is a great need for both internal and external education on the historical value of sports tourism to the area. In the mind of the Consultant, the CCSC staff, hospitality community, and community leaders could all use a primer on the overall impact sports related business brings to the area, and how an expanded sports marketing effort will benefit Columbia County in the future.
  - b. Stakeholder Engagement – Many high-level decision makers in the region are engaged in the community and are knowledgeable of the CCSC’s work, yet they can’t quite articulate the historical and annual impact of the CCSC’s efforts. By leading a collective conversation around sports tourism that will focus community leaders on the building blocks for success (examples: national sports marketing, event creation, and venue development/enhancement), the CCSC will be able to better engage the corporate community and elected officials in the region.

- c. Expanded Partnerships – From information gathered through the research process, the Consultant believes there is significant support to expanding the sports tourism effort in Columbia County. This includes an increased engagement of the County Commissioners, the Lake City Mayor’s Office, and the hospitality community at large. Increased collaboration focused on venue enrichment/development with these stakeholders will lead to positive results in economic development through the hosting of more sports tournaments and special events.
  2. Events – Additional strides can be made in the area of locally driven events, including activation on the following opportunities:
    - a. Diversification – Baseball and softball accounts for the vast majority of overnight stays relating to the sports market. The enhancement of the area’s venue inventory (in the form of new multi-purpose fields as an example), along with the re-launch of intercollegiate athletics at Florida Gateway College, offer the CCSC an opportunity to create and grow locally developed events (see below). These events could diversify the dependence on the bat and ball sports to drive a majority of overnight stays in Columbia County.
    - b. Addition of Special Events – Currently, the CCSC does not have a staff member responsible for special events such as concerts and festivals. As sports marketing and event management is similar to that of a concert or festival, several DMOs have merged the sports market with the “events” market. The Consultant suggests that the CCSC explore the inclusion of special events under the sports umbrella.
    - c. Created/Owned Events – Discussions with several local stakeholders uncovered opportunities to partner on locally created events that would in turn, deliver upon the mission of the CCSC. Currently, a vast majority of Columbia County’s sports tourism is delivered through softball and baseball tournaments. There are opportunities to work with more of the area’s sports clubs (examples: soccer, lacrosse, and football). Created (or locally “incubated”) events are becoming more and more popular among DMOs and sports commissions as a way to 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 a CVB) 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.
  3. Increased Collaboration – There are several groups across Columbia County that are looking to enhance their community and sports venue offering. Marrying the efforts of the CCSC with Columbia County Parks & Recreation and Florida Gateway College

would provide the County a big-picture road map, that is inclusive of all stakeholders in the region. In a community with the population size of Columbia County, and with the existing venue and human capital in place, a county-wide venue and programs master plan would benefit the entire region in a profound way.

### Threats

1. **Regional Competition** – There are several competitors in the area that are well established in the regional and national sports tourism space (see Appendix D). The high level of competition from Jacksonville, Gainesville, Tallahassee, and the Greater Orlando area, make it more difficult each day for the CCSC to remain relevant. While Columbia County may not want to be like these communities, their presence in the sports tourism space will require the CCSC to pick its proverbial spots and be smart about what its focus areas become. In addition, there is an expanding national trend of small and mid-market DMOs increasing their bed tax percentage and/or using other tourism-related funds (such as food & beverage taxes) to build sports venues (see Appendix B). As this bed tax activation trend is in its infant stages, the Consultant believes that no conclusions on the trend’s success or failure can be accurately drawn at this time. However, the use of tourism generated funding sources for venue enrichment and development is a strategy that should be considered by Columbia County in the future.
2. **Hotel/Restaurant Inventory** – Several respondents stated that the lack of “usable” hotel rooms and restaurant options could be detrimental to the long-term viability of sports tourism in the area. While there were some differing opinions on this topic, there were far more concerns raised than dissenting opinions.
3. **Human Capital** – The sports manager/director position at the CCSC has been vacant for some time. In order to effectively compete in the sports market, a dedicated and experienced sports tourism professional needs to be working on behalf of Columbia County. The Consultant Team believes this position should be filled as soon as possible.

### **SWOT Executive Summary**

In the opinion of the Consultant Team, Columbia County has done a good job historically of driving overnight stays to the area. This is largely in spite of a limited tournament-friendly venue inventory beyond that of Southside Park. There is an opportunity to continue to build upon its sports tourism success by expanding the CCSC’s effort to include more constituents across the community. Through this community-wide effort, Columbia County will realize increased economic activity for the region through additional overnight stays via sports tournaments and related events. Throughout the research for this project, it was evident to the Consultant Team that community leaders are largely supportive of an expanded sports tourism effort, and would use their time and political capital to support such an initiative.



In the eyes of the Consultant, the risk in continuing down the current path would be akin to marketing a truly unique destination like that of the “Joneses.” In the sports tourism and events marketplace, many cities have had success through a basic sales and marketing plan and an undifferentiating venue mix. For a community to “keep up with the Joneses” in this space, one would normally attend 1-2 major sports tourism conferences, hand out informational brochures, make a few follow-up phone calls, and field every RFP that hits their inbox. This reactive type of game plan is the most widely accepted way to play in this space. It is also often times the most ineffective and misguided use of the limited resources a community has available to them. A more strategic, resource efficient approach is required to have long-term success in the hyper-competitive sports tourism industry. That includes an evaluation on whether resources should be spent on human capital (staff), marketing (sales), or even venue enhancement and development. There are more options that need to be considered today, than in the “old-school” sports tourism model of the past.

In the opinion of the Consultant Team, an improved venue mix and the hiring of an experienced sports director, would enable the CCSC to have the assets to sell itself against its competitive set, and to continue its positive impact on the local community. Given the proper resources, the CCSC and its sports department could provide a significant impact to the local economy year over year, and could also enrich the lives of local community user groups as well. By sharpening its overall outreach effort, and strategically filling venue gaps, the CCSC and its partners will enhance community ROI in the sports tourism market, which will drive significant economic development to the region.

By strategically engaging the community’s leaders, the Columbia County TDC will build a strong environment for hosting regional and national tournaments, as well as concerts and special event-type programs. It is critical that the CCSC not only deliver on the recommendations set forth here, but also to create opportunities to draw the community together (examples: enable local promoters to grow their events and to create new ones, educate area civic groups and leaders on the value of sports tourism in Columbia County, offer the hospitality community meaningful engagement opportunities in this effort). The perception must be that the Columbia County TDC and Sports Commission is leading a sports tourism and marketing effort that is inclusive of all stakeholders in the region, and is enriching all of Columbia County in a meaningful way.

**Columbia County Sports Commission  
Sports Tourism/Marketing – Strategic Planning Project  
Synopsis and Recommendations**

The sports tourism industry has grown consistently over the past twenty years. Studies show that the grass roots portion of this market is worth more than \$9 billion annually to the domestic economy. Whether you use the National Recreation and Parks Association spending estimate (\$85 per person per day), the 2011 National Association of Sports Commissions study (\$208 per person per day), or the DMAI economic impact calculator, the value of this niche market is palpable for many small and mid-sized markets.

Add to this industry growth, the increase in popularity of soccer\*, lacrosse, and additional emerging sports (examples: BMX, pickleball, quidditch, rugby, 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 that there is an opportunity for Columbia County to enhance its presence in the sports tourism and events space. The key moving forward is for community stakeholders to work together in building and managing an expanded sports tourism and marketing program, and to focus political capital on enhancing the venue inventory in the region. This unified effort will drive economic development to the Columbia County region on a recurring basis from one year to the next. Through the execution of a strategic and targeted game plan, Columbia County will enhance its position regionally as a player in the sports tourism and events industry.

\* - ESPN's 2014 Luker Poll showed Major League Soccer (MLS) to be on par with Major League Baseball (MLB) on at least one affinity demographic. Survey respondents aged 12-24 ranked soccer as their second favorite sport, trailing only the National Football League (note: the survey did distinguish between college and professional football, with college football ranking behind soccer in this age group). In addition, while total attendance of MLS games is much lower due to the number of contests, the average attendance for MLS games in 2013 eclipsed that of Major League Baseball (MLB) and National Hockey League (NHL) games.

Methodology

The Huddle Up Group, LLC (“Consultant”) conducted an audit on the current sports tourism work of the Columbia County Sports Commission (“CCSC”). The audit included in-person meetings with multiple community groups and phone interviews with 17 key stakeholders, including the CCSC staff, community leaders, venue managers, athletic administrators, event owners, and additional targets that were identified by the CCSC. The Consultants reviewed several historical documents including marketing budgets, a sports venue guide, and the tax returns of the Columbia TDC. The Consultant Team also visited six (6) existing venues, as well as two (2) sites proposed for a new multi-sport field complex as well as a potential tennis facility.

The audit was led by Huddle Up Group Founder + CEO, Jon Schmieder, and Huddle Up Group Principal, Gary Alexander. The audit focused on three themes: (1) national best practices for sports tourism and events within a similar organizational structure, (2) identification of new business models/opportunities that would enhance Columbia County's sports tourism results, and (3) estimated financial implications for each recommendation. Discussions were held around national best practices in the three theme areas and focus was given to applications for the CCSC. The intent of this process was to create community support for the CCSC's increased sports tourism and venue enrichment effort by giving local stakeholders a voice, to foster a teamwork mentality for Columbia County, and for the TDC/CCSC to serve as the leader of this united effort.

The Consultant took the results from the phone and in-person interviews, as well as the initial site visit in Columbia County, then overlaid national best practices to develop and deliver the enclosed recommendations. These recommendations are intended to spark a dialog within the Columbia County leadership hierarchy in order to build a framework for next steps on an expanded sports tourism and marketing program. The enclosed game plan includes recommendations for three (3) primary focus areas and two (2) secondary concepts for future consideration. The primary areas can happen in the short-term, regardless of new resource acquisition. In addition, within the primary focus areas, each recommendation has an estimated annual cost associated with that action. 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. Costs for activation are noted at the end of each recommendation.

#### Primary Recommendation Areas

1. Organizational Structure
2. Messaging and Marketing Platforms
3. Event Solicitation Concepts

#### Secondary Recommendation Areas

1. Venue Development/Enrichment/Usage
2. Funding Model

### **Primary Recommendations**

#### Primary Recommendation #1: Organizational Structure

There is great opportunity for the CCSC to increase its regional and national presence in the sports tourism and events space. In order to expand in a meaningful way, the Consultant recommends two (2) action items aimed to strengthen the foundation of the CCSC's sports tourism effort. These recommendations are noted below with their anticipated activation costs in parentheses:

1. Staffing – Currently there is no staffing support for the TDC’s sports tourism program. It is imperative that the TDC hire an experienced sports tourism professional to take the role of sports director of the CCSC. Having an experienced leader with a sports tourism background is essential in that servicing meeting groups is vastly different than the requirements for supporting sporting events. Sports groups require several execution elements that a meeting normally would not, such as volunteer recruitment and support, media assistance, sponsorship facilitation, team and VIP transportation, reception planning and hosting, and venue scheduling/management. The best CVBs and sports commissions are able to effectively manage everything “outside the lines” so their clients can concentrate on the competition itself (“inside the lines”). Many DMOs simply place the responsibility for sports to a SMERF sales person and believe that by doing so they are “in” the sports market. This is a band-aid approach that often leads to event rights holders crossing those markets off of their list as potential host destinations for their championships. A proven professional with the knowledge and experience within the sports tourism market is essential for any community to succeed, which is as true in Columbia County as it would be in any other destination. In addition, the Consultants recommend the title of the leading staff member for the sports department be a “Director” level, and that use of the word “sales” is avoided. The word “sales” conveys a “heads in beds” focus to sports event rights holders. Rights holders want to know that the communities they partner with on their events know how to support sporting events and will do everything they can on game day to deliver the best end product for their athletes, their families, and fans.

(Activation Cost for a Director of Sports: \$60,000 - \$75,000 plus benefits, depending on experience.)

2. Leverage Community Support – The Consultants believe the current sports advisory group, although loosely defined, could be a valuable asset long-term for the CCSC. In the future, the group should be expanded to include leaders who have a great passion for continuing the sports tradition in the community, including the hospitality industry, Florida Gateway College Athletics Department, parks and recreation leaders, and community user groups. To continue the positive momentum, it is imperative for the CCSC sports staff to give these community leaders meaningful roles including ownership of specific tasks and programs going forward (example: allow the advisory members to lead the “6&6” program outlined below). This high-level of community engagement should also be a top marketing message used in selling the community to event rights holders.

(Activation Cost: Nominal).

## Primary Recommendation #2: Messaging and Marketing Platforms

Throughout the research process, the Consultants encountered instances where stakeholders (both internal and external) were unsure of the historical importance of sports tourism in Columbia County. While this is very common in markets the size of Columbia County, there is a significant amount of education that needs to take place in the future. The Consultant recommends four (4) action items to help improve the CCSC's sports market messaging to both internal and external stakeholders:

1. Local Communications – CCSC area stakeholders, the local media, and the hospitality community at large in Columbia County all need an increased education on the value sports tourism brings to the area. To deliver upon this message, the Consultant Team recommends the CCSC undertake the following actions:
  - a. Value Proposition – Create an education campaign to roll out both internally and externally. This monthly road show would be presented in a 60-minute coffee workshop format. The CCSC staff would partner with an outside stakeholder to present on the value of sports tourism to the region, and the work of the CCSC in the sports and events marketplace. The first of these meetings each year should be held with the TDC staff and board (internal) to ensure the TDC family is singing from the same “song sheet.” Additional presentations should be made to various community groups (examples: chamber leadership, civic clubs, high school athletic directors, hoteliers, restaurant association, etc.). It is important to reiterate that the CCSC staff utilize outside supporters (example: an advisory board member) as partners in these meetings in order to give the presentation community (or third party) validation.
  - b. Create Corporate/Hospitality “Forums” – Where the education campaign noted above is aimed at community groups, the CCSC should also develop a channel to educate and engage the corporate and hospitality community in Columbia County. The Consultants recommend the creation of a quarterly “6&6 Lunch”. These lunches employ six existing stakeholders (example: an advisory board member) to each invite one guest from the business community (six stakeholders, six guests, “6 & 6”) to attend an informative luncheon on the importance of sports tourism and the work of the CCSC in this area.
  - c. Measurements – In order to create and deliver the educational outreach programs outlined above, the CCSC must be able to message the success of its efforts. This would require the Commission to be able to accurately measure the economic impact of its activities (through past data captures, or via the NASC or DMAI impact models), and also be able to effectively capture room night totals from events it hosts. In addition, the CCSC should attempt to gather some historical data on what the sports department has generated to date. This historical tracking

should be updated from one year to the next and used in external communications where appropriate.

(Activation costs for items A & B: Nominal food and beverage costs if Value-In-Kind sponsors cannot be identified).

(Activation costs for item C: Nominal, as the CCSC already has access to the NASC and/or DMAI economic impact models).

2. Targeted (National) Outreach – The sports sales efforts of the CCSC have in the past included several industry conferences, and a select number of sales trips and FAMs in association with a state sports tourism alliance (Florida Sports Foundation). In the future, the Columbia County Sports Commission should conduct sales trips and FAMs on its own accord where financially viable, and include in each program local leaders and/or elected officials. The CCSC should budget for these added outreach events as well as the costs of travel for the leaders/electeds. The sports industry is all about relationships. Columbia County will be better served to develop these relationships in one-on-one environments, rather than via busy trade shows, jointly marketed sales trips, or FAMs.

(Activation Costs: \$5,000 per added outreach event, inclusive of costs for a community stakeholder, VIP, or elected official to attend. Two added outreach events would require \$10,000 in added budget support).

3. Strategic Partnerships – There is great opportunity for the CCSC to build bridges in the Columbia County community. More specifically, there is a need for the newly expanded sports tourism effort to bring area sports groups into the fold. Relationships can be enhanced with the various venue managers, Florida Gateway College leaders, and the various parks departments among others. There is opportunity to recognize the past work of these community leaders through an annual community awards event of some type. The end goal is for the Columbia County Sports Commission to be viewed as the "go to" organization when its partners need help to host an event.

(Activation Costs: \$2,500 - \$5,000 for an annual event or program to recognize the contributors to sports and events tourism in Columbia County).

4. Trumpet Successes – In all cases where the CCSC is involved in the production of an event, the organization should make it a priority to issue a press release on the community impact of the event. This release should be sent out via traditional and also new media outlets. The information should include economic impact data derived from the aforementioned NASC or DMAI tools. It is important that in this process that the Sports Commission steer clear of the perception of taking credit for the event in total, and that the event rights holder be included in the promotion process throughout.

(Activation Costs: Nominal).



### Primary Recommendation #3: Event Solicitation Concepts

During the research and analysis for this project, several areas of opportunity presented themselves relating to the sales and servicing of events. Two (2) such concepts are outlined below:

1. **Venue Booking Policies** – The CCSC should strive to have “favored nation status” at all parks and recreation facilities, scholastic venues, as well as at private facilities. While this is easy to state on paper, it is often tougher to achieve due to differing priorities between the venue manager and the CCSC. In some cases, this is also difficult to achieve where there is “territorialism” between various community constituents. If the CCSC were able to assist financially with the enrichment or expansion of area venues (beyond the current \$300,000 annual contribution to parks and recreation), there would be opportunity to request this favored nation status in the future. In addition, a transparent (shared) calendar at all venues is critical for the Sports Commission to add value to venue managers over time. This calendar would include the parks facilities, privately run venues, high school and college facilities, and additional locations with sports friendly spaces. In addition, the current booking rights contractually afforded to some of the area’s sports clubs need to be revisited in their entirety. It is the opinion of the Consultant Team that control of the calendar in these contracts still rests with the parks department, however precedent has been set that gives scheduling control to the sports clubs themselves. In order to be effective in the sports tourism space, a well-balanced use (between community user groups and tournament play) of all venues is critical. With that in mind, the Consultants recommend these agreements be revisited as soon as possible, and in the case where the TDC is investing in venue improvements, they should have control of those venues 18-months and further out (similar to how a CVB would block out key dates in their convention facilities).

(Activation Costs: A significant venue improvement fund could be used to leverage the event calendars controlled by area venue leaders, see below).

2. **Empower Local Promoters** – Columbia County has a strong foundation of event promoters whose work supports the mission of the CCSC. These locally based event professionals offer the Commission a tremendous resource to build annual sports and event properties, and thusly increase economic development. By offering support to these locally incubated programs (beyond the current \$15,000 event grant funds currently in place), the CCSC can build a solid annual cache of events that will allow it to then pick and choose where to participate in competitive bids for additional regional and national tournaments. The TDC and Sports Commission staff needs to engage in a progressive dialog with area sports/events leaders on the expansion of their existing franchises, and also the creation of new events within the successful structures that already exist (examples: replicating events like the USSSA tournaments, Half Mile cross country run,

and the Suwannee Bicycle Association races, rather than bidding against other cities for events through the usual RFP process). Growth of existing events and the creation of new properties will likely lead to opportunities to expand into multiple championships over additional weekends across all sports. Where the CCSC can help build recurring community “owned” events and championships, Columbia County won’t have to rely as much on bid-in events to fulfill its tourism mission.

(Activation Costs: \$10,000 - \$20,000 per year to serve as seed money for new/created events).

### Secondary Recommendation #1: Venue Development/Enrichment/Usage

As the refocused Sports Commission matures, the Consultant Team recommends the CCSC and its leadership group expand its sports tourism work in three (3) additional areas as outlined here:

1. Infrastructure Challenges – In order to be a valued community partner over the long haul, the CCSC needs to be able to offer support for future venue expansion. Creating a venue improvement fund (see below), and/or finding consistent ways to support area venues and their events will allow the CCSC to grow its impact in Columbia County for not only tourism, but also for community user groups.

(Activation Costs: Nominal in this phase).

2. Sports Venue Improvement Fund – For the Sports Commission to positively impact Columbia County’s grass roots sports events community, the Commission must identify a funding mechanism for venue enhancement projects. This would include special projects needed to consistently land major regional and national tournaments for the area. All venues that are used to host regional and national tournaments should provide permanent restrooms and concession facilities, television ready lighting, adequate parking on site, a championship field, wifi coverage, a tournament office to serve as an operational headquarters, and adequate power locations to accommodate television or new media style broadcasts. In addition, it is recommended that the addition of turf fields to the multi-sport field facilities (which would help “non-traditional sports” such as lacrosse/rugby/ultimate). In the case of turf additions at the multi-purpose fields, such upgrades would assist with field wear and weather related issues. Adding turf would greatly enhance the flexibility of the County’s venue mix for both community user groups and also tournament play. The Consultant Team believes the top priorities for the improvement of the outdoor facility offering should be: (1) providing adequate lighting and infrastructure for the current facilities/fields in the region, (2) expansion of the multi-use flat-field facilities, and (3) addition of turf fields. 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 (Examples: Evansville, Shreveport, Spokane,



Appleton, Tulsa, Eau Claire, Fort Wayne, Ashland, Millville, etc.). See Appendix B for additional details on this topic.

(Activation Costs: \$50,000 - \$100,000 per year in addition to the current \$300,000 parks and recreation contribution).

3. Multi-Purpose Fields – The Consultant Team offers up one conditional recommendation related to multi-sport fields. Should the existing agreement with the soccer club be amended to give control of the schedule outside of 18 months to the CCSC, the Consultant Team recommends that a study be conducted to evaluate the impact of a new multi-sport (flat field) complex. The existing flat field inventory in the County is lacking, however without control of the calendar to secure key weekends for tournament play, there is no reason for the TDC/CCSC to invest in new infrastructure either financially or politically. The upside is that a new facility for soccer, lacrosse, ultimate, football, and additional sports could open up land at the existing Southside complex for a much needed softball pinwheel. However, without a change in how these facilities are booked, this recommendation is moot.

(Activation Costs: \$15,000 - \$20,000 for a study on the economic impact of a new multi-sport flat field complex in Columbia County).

4. New Multi-Purpose Venue – The three recommendations made above are the key items at this point in the County’s progression to attract more sports tourism dollars. Once those three projects have been explored, the Consultant Team offers up one stretch goal for community consideration. The Consultant Team believes that the County should investigate further the concept of a new multi-purpose indoor venue. The region is void of any significant indoor space that could drive additional overnight stays through sports, meetings, and conventions. A multi-purpose facility would be beneficial to most all areas of the tourism market, and could also provide a venue for community use such as consumer trade shows, civic group meetings, graduation ceremonies, and the like. Noted previously, the ability to increase tourism in shoulder and off-peak seasons is predicated on having suitable, and available, venues. The lack of such a facility is a hole in the community offering of Columbia County. The Consultant team recommends that the CCSC and its local champions evaluate the potential development of a new indoor facility to host sporting events as well as meetings and community activities. This project could take on many different shapes, including the development of an entirely new facility, or the repurposing of an existing building. An indoor facility offering would allow for Columbia County to host numerous events in the fastest growing indoor sports, and to diversify beyond baseball and softball. The growing sports opportunities could include:

- Mixed Martial Arts (MMA) – Core participation in MMA competitions is up 77% over the past three years, totaling over 1.29 million athletes.

- Pickleball – USA Pickleball’s membership has grown four-fold in the past three years.
- Cheer and Dance – 1.6 million core participants engaging in the sport at least 13 times per year.
- 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 indoor option would also allow for the hosting of many of the larger more traditional and established sports competitions, including:

- Basketball – 15.636 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 – 2.656 million core athletes participating 13 or more times a year.
- Archery – Core athlete participation (26 or more days per year) in Archery is up 8.1%.\*

\* – The statistics noted above were obtained from the 2016 Sports & Fitness Industry Association’s annual sports participation report. The study measures participation changes over 1, 3, and 5-year changes.

While the development (or redevelopment) and construction of such a facility are outside the scope of this project, basic multi-use facilities can be brought to market for between \$125 (basic build out) and \$185 (higher end product) per square foot, depending on varying market factors. These estimates do not include land acquisition, nor any additional city services that may be needed such as sewage, electrical, right of ways, etc. Assuming a mid-tier build out at a \$150 per square foot price point, a new 100,000 square foot building on city or county owned land would cost \$15,000,000 to construct. The Consultant Team recommends that a deeper dive feasibility study be conducted which includes the anticipated ideal size of a new multi-us facility, potential costs and timeline of construction, an evaluation of potential sites, as well as the economic impacts of the new venue including projected direct visitor spending models, events that can be attracted with a new multi-purpose venue, and projected sales/hotel tax collections. In addition, the study should address various management models and the financial implications of each option. While it is outside the scope of this study, the national best practice of indoor multi-use facilities in markets similar to Columbia County seems to fall in the 100,000-square-foot category (in order to house eight basketball courts that can convert to 16 volleyball courts in one location).

(Activation Costs: Multi-purpose venue feasibility study \$40,000-\$50,000. New venue development \$15,000,000).

## Secondary Recommendation #2: Funding Model

A strong opportunity in the sports tourism and events space lies ahead in Columbia County, if and when a funding source can be identified to enhance the CCSC's current venue mix and sports development program. The Consultant Team would recommend that the TDC's existing reserves (estimated at \$1.6M) be used as "challenge" funds to attract additional public and private investment to drive the projects outlined above. The daily activities of the CCSC are funded through an allocation from the TDC, however capital projects will need a model to boost their priority in the community. The Consultant Team believes leveraging current reserves and future revenues is a model that should be pursued.

As noted previously in this report, numerous communities across the country are putting tourism based funding (tax collections) into bricks and mortar facilities. Currently, Columbia County is generating enough funds (through bed tax collections of 5%) to not only cover their annual marketing objectives, but to also reinvest some of these funds into capital projects to enhance the community's tourism revenues over the long-term.

Note: A summary of all recommended activation costs can be found in Appendix E.

### **Conclusion**

Columbia County has made a significant investment in the sports tourism marketplace over the past several years. There is additional opportunity to build upon the area's historical success in developing regional grass roots events, creating new event inventory, and hosting regional and national championships. In order to further enhance the impact of sports tourism on Columbia County, the CCSC needs to focus its efforts on three (3) overarching objectives:

1. Create a culture of sports tourism development, rather than purely sports sales.
2. Enhance the region's venue "tool kit" by improving the existing facilities.
3. Once the above items are achieved, explore the addition of multi-use venues, first outdoor, then indoor.

While the TDC is in good financial health, its sports marketing budget for the CCSC is still underfunded against its competitive set. In order to be effective, the Columbia County Sports Commission needs to be creative in how it promotes the destination, and in how it empowers its local event promoters to build a foundation for long-term success.

Specifically, the Columbia County Sports Commission (as a division of the TDC) should focus its resources on three (3) initiatives (or "Pillars" as outline in Appendix F). Each Pillar has a specific target audience, as well as tactics to achieve the Sports Commission's goals for each

area. The Pillars are meant to be simple and also clarifying, so both internal and external stakeholders can easily understand the mission of the Columbia County Sports Commission. The Pillars include the following three (3) focus areas:

1. Events – This two-pronged approach would include pursuing the traditional bid-in events with rights holders and NGBs, as well as incubating and creating events with the area’s local promoters. As the Sports Commission’s expanded efforts take root and new (local) events are developed, there will be less of a need to focus on competitive bid processes to drive overnight stays. Both the traditional bid-in events as well as creating events that drive overnight stays will deliver on the CCSC’s tourism mission.
2. Venue Enhancement – Providing a revenue stream (challenge grants against cash reserves) and a master plan to enhance the area’s existing venues, to develop new facilities that positively impact tourism for the area, and that serve as assets for the region’s community user groups.
3. Community Engagement – Messaging the mission of the CCSC, the historical success of the organization to various stakeholder groups in a meaningful way.

The unprecedented growth of the sports tourism industry (see Appendix C) shows the high level of market sustainability that support the expansion of economic development in this space for Columbia County. The recommendations suggested here will not only positively impact the region’s tourism profile, it will positively affect 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 the CCSC to expand its reach in the sports tourism space. With that in mind, there is an opportunity for the CCSC to be the connection point for the community in the area of sports tourism through the development of new event and venue products. This investment will, in turn, help drive economic development year over year.

As in any new project, there are numerous variables that would need to be considered in evaluating the ROI and risk in expanding the CCSC’s tourism program, including the addition 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 the eyes of the Consultant, the puzzle pieces exist in Columbia County to build upon the CCSC’s past success and to compete in this highly competitive industry. The only question would be to what extent this sports development effort can be financially inclusive in order to

better benefit the entire region. The Consultant Team believes it is within the power of Columbia County and its stakeholders to capture more opportunities in the sports tourism market, while also enriching the lives of its citizens. This community-wide effort will lead the area towards a “regionalism” mentality by connecting the tourism and business communities in an ongoing and proactive manner.

Final report submitted to Columbia County on March 26, 2017.

## Appendix A – Competitive Set Analysis

DMOs across the country are investing tourism related dollars (in the form of bed/occupancy or restaurant taxes) in facilities to attract incremental tourism dollars. These facilities can be in the form of grass roots sports parks or gymnasiums, convention centers, or multi-use indoor venues. In evaluating the gaps in Columbia County, multi-use spaces (both indoor and outdoor) are severely lacking. Adding multi-purpose facilities would allow the TDC/CCSC to drive additional visitation to the county, especially during shoulder and off-peak tourism seasons.

While the TDC is on secure financial ground, below is a snapshot of regional competitors that are active in the sports tourism market. Note the level of financial and also human capital investment of this competitive set. While some of these markets are larger in population, the ratio of their investment in sports tourism are far beyond that of Columbia County.

Destination	Sports Marketing Budget	Population	Structure	Staff Size	Measurement Matrices
Polk County Sports Marketing	\$ 1,787,200	623,009	Blended	7	Economic impact
Palm Beach County Sports Commission	\$ 692,760	1,372,000	Stand Alone	9	Room nights, event bids, site visits, funding of events, host/support events, TV coverage
Leon County	\$ 480,000	281,845	Blended	2	Room nights, # visitors, # events, # of local teams, direct spending
Pensacola/Escambia County	\$ 460,000	305,817	Stand Alone	6	Room nights, economic impact, seasonal impact, image enhancement
Lake City/Columbia County	\$ 336,500	67,543	Blended	1	N/A
Daytona Beach/Volusia County	\$ 130,000	494,593	Blended	2	Prospects, leads, definite business

**Note:** Lake City/Columbia County’s \$336,500 sports marketing budget includes a \$300,000 payment to the parks and recreation department, in essence leaving only \$36,500 with which to market the destination.

## 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). 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:

- Evansville (IN) recently opened a new \$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 CVB itself.
- Spokane (WA) is in the process of bonding \$25 million against future bed tax collections to construct a new athletic field house.
- Shreveport (LA) recently passed a bed tax increase for the expansion of their sports commission's national marketing program. This new tax also supports the Independence Bowl (venue enhancements) and the 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) indoor sports complex, and to renovate three existing sports facilities used to attract regional and national tournaments.
- 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.
- Placer Valley (CA) is allocating funds from an increased bed tax as well as a new hotel assessment to construct and manage a \$35 million multi-use all turf sports complex. The venue will be managed by the area tourism bureau and is slated to open in 2017.
- Pasco (FL), in partnership with the Florida Sports Foundation, is in the process of developing 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 (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.

- 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. Currently the program is used to by the City's Capital Improvement Board to finish the financing of major capital projects such as a new hotel in downtown next to the convention center, building an industrial building to retain a major employer, and helping to build a parking garage to attract a major mortgage company to downtown. 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. 20% of these funds are allocated to the acquisition and preservation of open spaces for parks and recreation. 80% of the funds are 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." This legislation authorizes a municipality to establish a sports and entertainment district within that municipality. The act authorizes the establishment of one or more new local taxes and dedicates the revenue from some or all of those taxes to financing projects in the sports and entertainment district. Under this legislation, the community of Millville levied a 2% local food and beverage tax to fund the Millville Sports and Entertainment District, and in turn, the development of the New Jersey Motorsports Park, a 500 acre sports and entertainment destination that hosts numerous events including NASCAR racing.

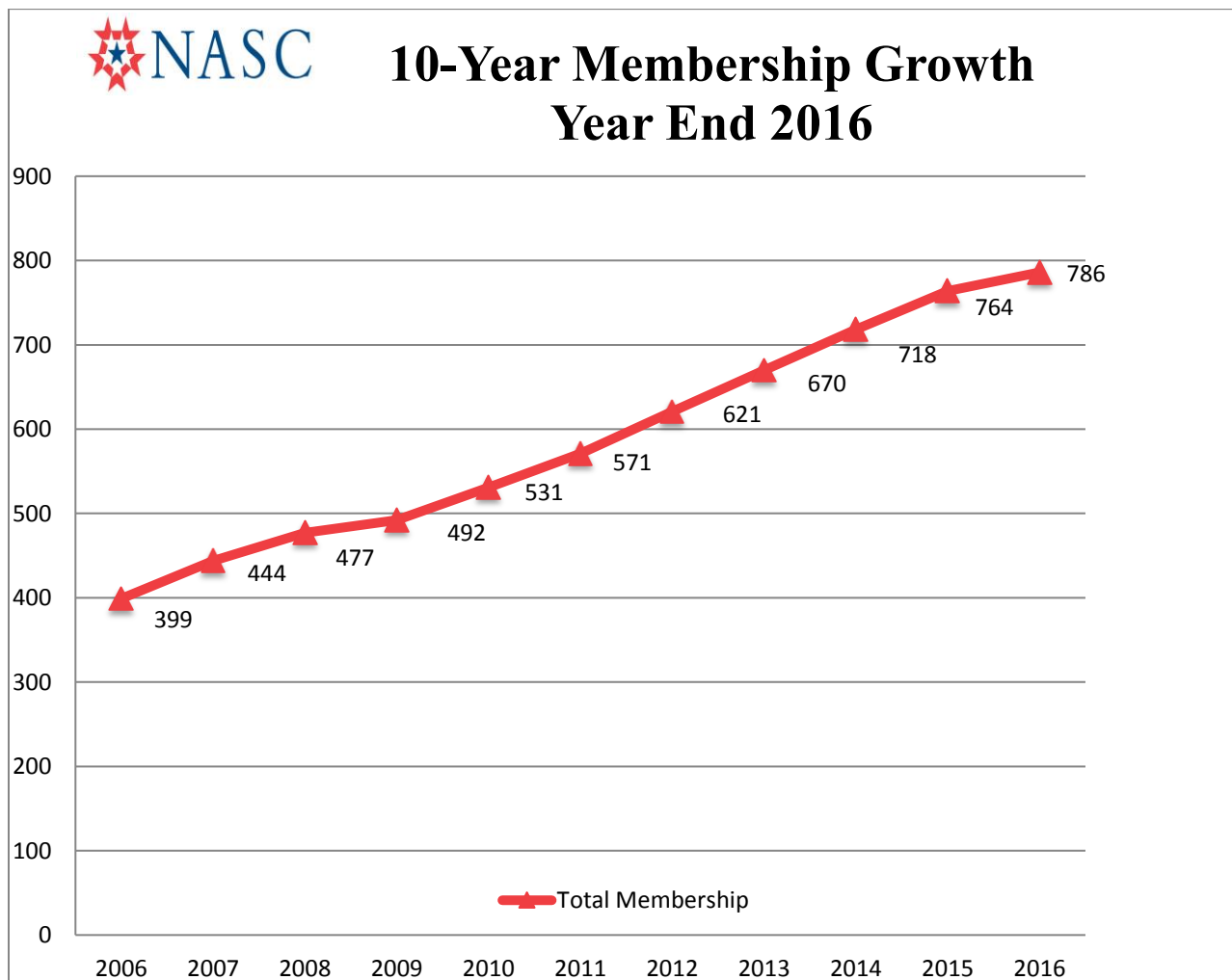
It should be noted that different States have different regulations regarding the use of bed tax funds. The cases outlined above are not exhaustive, and should be viewed only as examples for further discussion.



## Appendix C – National Association of Sports Commissions (NASC) 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 the NASC show that the grass roots sports tourism industry is worth over \$9 billion and that there are more events today, with more participants competing in those events, than ever before.

Projections indicate that the grass roots 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 the NASC, which is a direct correlation to the growth of the sports tourism industry as a whole.

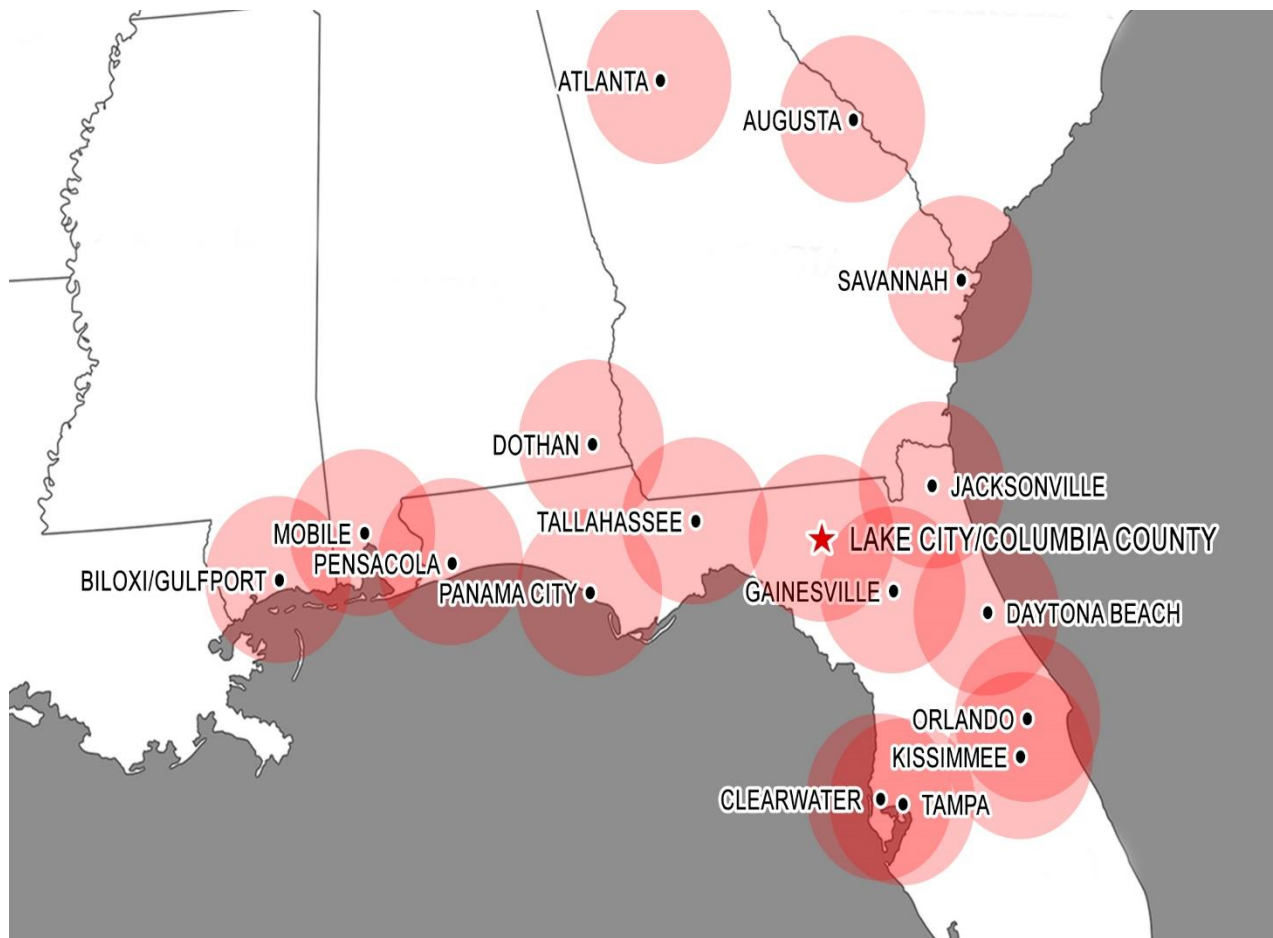


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## Appendix D – Regional Competition Analysis

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, sports commission, city, or through an alternative organization.

Below is a visual representation of the various entities in Columbia County's region that are active in the sports tourism and events space. The circles surrounding each city represent a 100-mile drive market for local and regional events. 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.



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**Appendix E – Columbia County Sports Commission  
Summary of Activation Costs (Primary Recommendations)**

Director of Sports	\$60,000 - \$75,000
Targeted (National) Outreach	\$5,000 - \$10,000
Strategic Partnerships	\$2,500 - \$5,000
Local Promoter Support	\$10,000 - \$20,000
<b>Gross Total</b>	<b><u>\$77,500 - \$110,000</u></b>
Current/Traditional Sports Marketing Activities	\$36,500
<b>Net Total (Projected Annual Budget)</b>	<b><u>\$114,000 - \$146,500</u></b>

**Venue Development Concepts\*  
Summary of Activation Costs (Secondary Recommendations)**

Venue Improvement Fund	\$50,000 - \$100,000
Multi-Sport (Flat Field) Feasibility Study	\$15,000 - \$20,000
Multi-Purpose Venue (Indoor) Feasibility Study	\$40,000 - \$50,000
<b>Gross Total (No Multi-Purpose Venue Constructed)</b>	<b><u>\$105,000 - \$170,000</u></b>

\* - Note the assumptions made for a new Multi-Purpose venue within the body of this report. This is a broad-brush estimate that should be studied in more depth. The Consultant Team makes no guarantees or representations about the final cost of construction of a new Multi-Purpose venue in Columbia County.

**Appendix F – Columbia County Sports Commission  
5-Year Strategic Mission Pillars**

In the future, Columbia County’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 in Columbia County. This refined focus will help the TDC/CCSC enhance its messaging and will deliver directly on the organization’s mission. The recommended Pillars are below along with their driving audiences/factors.

<b>Columbia County Sports Commission 5-Year Strategic Mission Pillars</b>			
<b>Pillar</b>	Events Bid/Created/Owned	Venue Enhancement	Community Engagement
<b>Audience</b>	Tourism Economic Development Rights Holders/NGBs Local Promoters	Hospitality Leaders Elected Officials Economic Development	C-Level Community Leaders Local Media Non-Profit Civic Groups Hospitality Community
<b>Tactics</b>	RFPs & Event Bids Grants/Incubator Program Grow existing events 10%/Yr. Create one new event/Yr.	Retained Earnings Venue Development Fund Feasibility Studies New Multi-Sport Venue(s)	“6&6” Lunches Economic Impact Releases Corporate Support/Recognition National Outreach