LEON COUNTY

FACILITY NEEDS ASSESSMENT

March 2011

Conducted by the Florida Sports Foundation as an Industry Partner service for Tallahassee Sports Council, the sports marketing entity of Visit Tallahassee

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Introduction

In January 2011, the Florida Sports Foundation began work on a request by the Tallahassee Sports Council, the sport marketing entity of Visit Tallahassee, to conduct a facility needs assessment of the Leon County area. The purpose of this study is to assist Visit Tallahassee in providing a strategic assessment of the current inventory of competition quality sport facilities and to identify the County's needs for sport venues that would generate economic impact through the development of sport tourism in the area. This study is not intended to analyze the area's need for community sport facilities that service recreational or scholastic programming. However, the recommendations in this report may provide opportunities to serve the community's needs as a secondary benefit. In addition, the contents of this report may reference projects or land use in consideration, but does not serve as a feasibility study for the use of any property or real estate.

The Florida Sports Foundation worked in partnership with Visit Tallahassee to categorize the current inventory of sport facilities in the area. The Foundation utilized a categorization system based upon each facility's potential to serve as a viable venue that would attract statewide, regional and national sport events, producing significant economic impact (major events) for Leon County. In addition, facility availability and cost associated with rental and use were taken into consideration. The Foundation based its categorization on common industry standards for event rights holders seeking communities in which to host events major events. Conducting venue tours and analysis, facilities were placed into the following categories: Competition Facility, Stadium Facility and Auxiliary Facility.

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Competition Facilities are defined as those ideal for attracting and hosting major events based upon venue construction and availability. Competition facilities were provided with sub-rankings of "A" and "B" based upon their availability to host outside events and on the current condition of the venue. Some recommendations have been provided for potential upgrades that would make a facility ideal for hosting major events.

Stadium Facilities were provided their own category due to their unique nature. These facilities are those that are considered premier competition venues with outstanding spectator areas, but typically with one playing area. In most cases, the singularity of Stadium Facilities is not conducive for serving as the main competition venue for large tournaments. However, the Stadium Facility may be utilized to attract major events by offering the venue for championship play, though this incentive may be limited by costs associated with facility use and rental as well as its availability.

Auxiliary Facilities are those that may not be able to host major events independent of a Competition Facility. These facilities are regularly accessible for hosting outside events and affordable, but cannot be upgraded to rectify the deficiency which makes them dependent upon a Competition Facility.

Once the inventory of facilities was categorized, Foundation staff visited select locations and identified key facility owners and sport leaders in the community with whom to conduct interviews. Taking the results of this process and analyzing it against current industry trends, the Florida Sports Foundation is presenting this report identifying key strategic areas of consideration for investment in Leon County's sport facility inventory.

Industry of Sport Tourism

In July 2005, the Florida Sports Foundation commissioned a report through the Washington Economic Group, Inc., to study the economic impact of sport in Florida. The studies found that sport and recreation activities contribute to the economic development of Florida in two critical areas: (1) generator of economic output (gross state product, labor income, employment & fiscal revenues) (2) provider of benefits such as improving quality of life, providing an attraction for overnight visitors and facilitation the recruitment, retention and expansion of business enterprises.

In 2005, this report found that the total economic impact of sport and recreation in Florida was an estimated $32 billion, supporting 434,000 employment positions and providing for $12.9 billion in annual labor compensation. Sport and recreation contributed $20 billion in gross state product to the Florida economy and produces $2.1 billion in revenues to state and local governments.

At the time of the report, there were 18 sports commissions in Florida, which included the Tallahassee Sports Council. The study reported that the economic impact of events sponsored by the 18 sports commissions is an estimated $668 million, supporting 9,700 positions. Labor compensation generated from these events was $245 million and contributed $48 million in revenue for state and local governments.

Since that time, the number of sports commissions in Florida has increased to 21, creating more competition to attract major events to communities in the state. In addition, there are almost 400 active sports commissions in the U.S., competing to attract business to their communities. The market place will only continue to grow and become more competitive in the years to come, as more communities begin to realize the positive impact of sport tourism. In Florida alone, the Florida Sports Foundation is

aware of three (3) new areas considering the development of sports commissions, two of which are already actively seeking to attract sporting events to their communities.

In the 2009-2010 fiscal year, the Florida Sports Foundation awarded 35 grants to events which attracted out of state visitors. These 35 grants totaled $374,000 and produced $107,806,666 in out of state economic impact alone, attracting almost 190,000 out of state visitors, thus yielding a $288 return on investment.

In the 2009-2010 fiscal year, Visit Tallahassee was directly involved with sporting events that attracted 44,557 visitors to the area, generating 20,100 room nights and $22,533,848 in economic impact. With an investment of $175,660 for the 2009-2010 Tallahassee Sports Council grant and bid pool budgets, Visit Tallahassee is producing a $129 return on investment for Leon County. Therefore, for every $1 spent on sports marketing, Leon County is receiving $129 in economic impact, which is within the average ROI range for local sporting event grant programs. *Note: It is common for ROI to fluctuate from event to event and year to year, depending upon several market factors.*

Many communities have been making significant investments in building and developing new facilities or upgrading existing facilities to stay competitive in the market place. While historically a sports commission has been limited to marketing facilities that have been in existence for recreation purposes or private enterprise, there has been a significant movement to develop venues with the primary purpose of attracting events to the area, serving as a contributor to the local economy. One example is the Lake Myrtle Sports Complex in Polk County, Florida. With the departure of the Cleveland Indians in 2009, the Winter Haven/Auburndale area was prepared to see a significant decline in Spring Training tourism. This dilemma and the increasing demand for new venues in the area sparked the development of the

Lake Myrtle Sports Complex. Once a community park with three multi-purpose fields, Lake Myrtle Sports Complex was developed into a mega sports complex. Boasting five regulation (collegiate) baseball fields, 11 multi-purpose (soccer) fields, and 11 youth baseball fields as the beginning phases, the park also houses the Florida Sports Hall of Fame, Polk County Sports Marketing headquarters and the Florida Youth Soccer Association headquarters. When proposed, the facility was estimated to generate $60 million in economic impact by hosting 75 events annually.

Such sport initiatives are being developed or considered in communities throughout Florida and the Nation. Walton County is currently conducting a study to develop a multi-sport complex, the community of Lakewood Ranch (Sarasota/Manatee Counties) is constructing a 22 multi-purpose field (soccer) complex with plans to include baseball and softball fields, City of Newberry (Alachua County) is partnering with Nations Baseball to develop a 16 field baseball complex, the City of Newberry has also partnered with Easton to construct a regional Archery training and competition facility and Jonesville (Alachua County) has recently built a sports complex with four (4) Baseball fields, six (6) multi-purpose fields and 14 lit clay Tennis courts and one (1) tournament standard court. These are just some of the new sport facility initiatives currently happening throughout Florida. Visit Tallahassee's assessment of its facility inventory and long term-planning for investment in sport tourism is an important consideration to remain competitive in the market. *Note: Alachua County is a comparative community to Leon County. Both are similar in population, have a significant University presence, bed tax collections, sport tourism budgets and are close in geographic proximity.*

Visit Tallahassee has numerous community partners / facility owners willing to assist in its sport marketing efforts. Florida A&M University (FAMU), Florida State University (FSU), Leon County Parks & Recreation, Leon County Schools, Tallahassee Community College and Tallahassee Parks,

Recreation and Neighborhood Affairs among others have supported the Tallahassee Sports Council for many years, offering their facilities when available. However, while gathering research for this report, the Foundation found a trend in the goals & objectives of Leon County's facilities. In conducting interviews, it was determined that very few facilities in Leon County have been constructed for the primary purpose of attracting events to the area nor consider this to be a primary function of their operations. Most facilities have been developed for the purpose of providing local programming or service. It is the opinion of the Foundation that the community should consider developing a facility with the primary purpose of attracting major events and team trainings to the area, making local programming a secondary function.

Recommendations

Based upon research conducted of Leon County's facility inventory, the Foundation has identified several strategic areas of consideration that would assist Visit Tallahassee's efforts of attracting major sporting events and broaden its current market. These recommendations have been presented on the following pages, categorized by facility type. Though these recommendations have been divided into sections for the purposes of this report, the Foundation is not suggesting that the facilities be considered as projects in separate venues / locations. If the opportunity is available to pursue the development of these facilities, there would certainly be benefits in considering sharing resources and infrastructure by planning each recommendation as phases of an overall major sport complex plan.

Multi-purpose Fields

For the purposes of this report, multi-purpose fields are defined as competition quality grass fields used for sports such as field hockey, football, kickball, lacrosse, rugby, soccer, ultimate or any other sport requiring a flat open grass space. Each of the sports listed above require different

dimensions for field of play, therefore, some multi-purpose fields may have suitable space to accommodate some sports, but not others. Leon County has a total of 60 fields in 23 different locations or venues that have been categorized by the Foundation as a Competition Facility, Stadium Facility or Auxiliary Facility. Of these facilities, four (4) were categorized as Stadium Facilities which included FAMU Bragg Stadium, FSU Doak Campbell Stadium, Gene Cox Stadium and the FSU Soccer Complex. Though Leon County has many fields suitable for play, it is averaging 2.6 fields per venue, which is not ideal for competition. The two most attractive facilities for major sporting events are Meadows Soccer Complex and FSU Recreation Sport Complex.

Meadows Soccer Complex is a 10 field facility located on the north end of town. This facility is owned by City of Tallahassee and is an ideal competition facility that any community would showcase. The use of Meadows Soccer Complex is restricted, however, due to several factors making accessibility an issue when attempting to attract major sporting events. 1) The facility has historically been restricted for Soccer play only. 2) The facility is currently over utilized and has very limited dates of availability.

The FSU Recreation Sport Complex boasts 12 multi-purpose fields, four (4) tournament fields and five (5) Softball fields, and is a state of the art facility. No detail has been overlooked when designing this venue, including separate concessions and ticketing areas, tournament operations / team meeting rooms, locker rooms, digital message boards, score boards, lighting and a field design allowing for optimal flexibility in configuring field of play. The FSU Recreation Sport Complex is also restricted due to several factors making accessibility an issue when attempting to attract major sporting events. This facility is operated by FSU Recreation Department, therefore its primary function is for student activities. This creates scheduling challenges for

events that may be held during the week and during the spring and fall semesters. In addition, the facility cannot be guaranteed for an outside event, since student clubs/activities take priority over outside events.

The need for a multi-purpose field facility is evident looking at the 2009-2010 fiscal year events to which Visit Tallahassee has provided support. Only five (5) events utilizing multi-purpose fields were granted generating an estimated economic impact of $900,046, all of which were Soccer events. With the popularity of other field sports being played throughout the U.S., Leon County's sport tourism efforts could benefit from the development of a multi-purpose field competition facility, focused on attracting major events to the area.

It is the Foundation's opinion that a complex with no less than 12 multi-purpose fields, much like the FSU Recreation Sport Complex fields, would create a unique regional marketing opportunity for Leon County. Looking at the surrounding Florida communities including Gainesville, Jacksonville, Panama City and Pensacola, the two largest multi-purpose field facilities are Santa Rosa Soccer Complex in Pensacola (18 fields of various sizes) and Patton Park in Jacksonville (12 fields).

Though it is not the purpose of this report to provide recommendations outside of the scope of a facility needs assessment, it is important to provide the following for consideration.

Understanding that there have been discussions regarding the possibility of relocating the North Florida Fairgrounds and developing the current property located on S. Monroe Street and Paul Russell Road (the current North Florida Fairgrounds complex), this location may be one of consideration for a multi-purpose field complex. The proximity of Gene Cox Stadium would make for an attractive tournament facility for major sporting events, having tournament level

fields and a championship stadium facility all at one venue. In addition, there are currently two baseball fields adjacent to the property at Capital Park, which would add to the sport atmosphere and could present other development opportunities. Listed below, is a small sampling of national and regional events that could be pursued with competitive multi-field complex with a minimum of 12 fields.

Sport/Event	Organization Name	City	Year	Economic Impact	Room Nights
2011 National Girls Club Championship	USA Field Hockey	Richmond	2011	N/A	800
Let It Fly Flag Football Championships	Team Championships International, LLC	Central Florida	2009	$ 118,257	1,338
Weekend Flag Football Tournaments	360 Sports	Multiple locations	2011	N/A	660
NIRSA Regional Events (Adult Flag Football)	NIRSA	N/A	2011	$ 114,972	768
Dick's Sporting Goods Tournament of Champions Boys Nat'l Club Lacrosse Finals	NDP Lacrosse	Wesley Chapel	2008	$ 379,050	1,088
Dick's Sporting Goods Tournament of Champions Boys Nat'l Club Lacrosse Finals	NDP Lacrosse	Wesley Chapel	2009	$ 884,820	2,232
Dick's Sporting Goods Tournament of Champions Boys Nat'l Club Lacrosse Finals	NDP Lacrosse	Wesley Chapel	2010	$ 1,631,152	3,044
IWLCA Presidents Cup Lacrosse Tournament	Corrigan Sports	Naples	2010	$ 1,583,620	5,784
Lacrosse Spring Break Training	3DLAX	St. Pete/Clearwater	2011	$ 1,014,020	3,750
Australia Day Challenge (International Rugby League Game)	Southeastern Rugby League, LLC	Jacksonville	2008	$ 790,400	1,303
2008 Rugby DI & DII Women's Club Championships	NCAA	Central Florida	2008	$ 389,120	1,024
2009 USA Rugby College Playoffs	USA Rugby	Central Florida	2009	$ 1,119,833	2,151
2008 National Cup VII Region C Tournament	US Club Soccer	Jacksonville	2008	$ 249,660	1,572
US Youth Soccer Olympic Development Tournament	US Youth Soccer	Ft. Lauderdale	2008	$ 1,338,664	4,485
US Soccer Development Academy Spring Showcase	US Soccer	Sarasota	2009	$ 1,382,616	5,368
2009 USASA National Cup	US Adult Soccer Association	Central Florida	2009	$ 294,294	924
USL SoccerFest	United Soccer Leagues	Tampa	2009	$ 3,203,795	8,500
US Youth Soccer ODP Tournament	US Youth Soccer	Ft. Lauderdale	2009	$ 1,027,500	3,141
2010 US Soccer Spring Showcase	US Soccer	Sarasota	2010	$ 1,596,160	4,620
American Youth Soccer Org. National Games	AYSO	Palm Beach	2010	$ 5,896,170	10,290
USL SoccerFest	United Soccer Leagues	Tampa	2010	$ 3,271,545	8,150
2010-11 ECNL Regular Season Event #2-Florida	Elite Club National League	Central Florida	2010	$ 1,639,335	1,950
Ultimate Soccer 3v3 World National Championships	K1 International, LLC	Central Florida	2010	$ 3,088,800	1,500
2010 USA Ultimate Club Championships	USA Ultimate	Sarasota	2010	$ 1,490,685	2,975
UPA Club Ultimate Championships	Ulitmate Players Association	TBD	2013	$ 1,315,600	1,000

Gymnasiums & Multi-purpose Indoor Space

For the purposes of this report, Gymnasiums have been categorized as a facility with acceptable flooring, ceiling height, scoreboards, nets and lighting to conduct Basketball and Volleyball (Note: Gymnasiums can also host a number of other sports such as Badminton, Cheerleading, Gymnastics, Martial Arts, Table Tennis, Wrestling, etc… depending on facility design and with the addition of sport specific flooring, lines or equipment). The Foundation has used a regulation highs school or collegiate size Basketball court as the standard when referencing the number of courts a gymnasium has, understanding that a regulation Basketball court can host multiple Badminton, Pickleball, Volleyball and other sport competition areas.

Multi-purpose indoor space refers to an indoor area such as a convention or civic center that can accommodate indoor sports with the installation of flooring, competition surface or sport specific equipment. Like Gymnasiums, Multi-purpose indoor spaces can conduct sports such as Badminton, Basketball, Cheerleading, Gymnastics, Martial Arts, Table Tennis, Volleyball and Wrestling, depending on facility specifications.

Leon County has a total of 16 Gymnasiums that are suitable for competition, totaling approximately 27 courts. Of the 16 Gymnasiums, one (1) would be considered a Stadium or arena facility, the new FAMU Al Lawson, Jr. Multi-purpose Center (Lawson Center), which is able to accommodate four (4) courts. *Note: The Tallahassee Leon County Civic Center also has a Stadium or arena facility, but this venue is defined as a Multi-purpose Indoor Space.* Of the remaining 15 Gymnasiums, five (5) are categorized as Competition Facilities totaling 13 courts. Ten (10) Gymnasiums are Auxiliary Facilities totaling 10 courts. In touring Leon County's Gymnasiums, the two facilities that are ideal for major sporting events are the Lawson Center and the FSU Tully Gymnasium.

With 135,000 sq. feet of space and a seating capacity of just over 9,600, the Lawson Center is an outstanding arena that could hold a number of major sporting events. The facility has four (4) courts, one of which is slightly obstructed only making it suitable for a smaller modified court. In addition, the FAMU Campus has the Gaither Gymnasium with one court, FAMU High School with one court, and the new FAMU Recreation Center with two courts within walking distance. Unfortunately, the rental price structure for the Lawson Center creates a financial challenge since costs are more in line with those of a convention center rather than a gymnasium. In addition, the building has several classrooms which can present scheduling challenges during the school year. The FSU Tully Gymnasium also has four (4) courts with portable seating, allowing some flexibility with configuring space. Located on the Florida State University Campus, Tully has ample parking, if used while school is not in session. Tully is regularly utilized by FSU Athletics and Recreation, therefore presenting an accessibility challenge for events conducted during the week and school year. Since Tully has much less seating than the Lawson Center, the Gymnasium portion of the building has less square footage, creating more of a field house atmosphere than that of a large arena.

The Tallahassee Leon County Civic Center is a multi-purpose indoor convention center with a 13,000 seat arena and over 54,000 square feet of meeting and exhibition space. The facility has a regulation collegiate basketball court floor for the arena. The arena floor, meeting and exhibition space is suitable for a number of different indoor sport events. The facility is accessible mostly during the summer months (June-August), becoming the least accessible in January – February. Rental fees and services are reasonable for an arena/civic center. However a venue of this kind is typically reserved for larger events that can justify the rental fees for a facility of this caliber.

Reviewing the current inventory of Gymnasiums and Multi-purpose Indoor Space, there is a market in Leon County and the state of Florida for a large field house complex with a minimum of six (6) courts. A facility of this type has the potential to attract many types of sporting events, camps, team trainings and programs. The number of courts would allow for larger tournaments or permit the facility to host multiple events at one time. A large field house would be unique to the state of Florida, since most large multi-court facilities are typically not accessible and those that are, are mostly three (3) court facilities.

One example is the University of Florida's SW Recreation Center in Gainesville, which is a 140,000 square foot facility boasting six (6) basketball courts. Only two of the six courts are made available for outside events, since the facility focuses on servicing students of the University of Florida. Between Gainesville, Jacksonville, Panama City and Pensacola, the largest concentration of accessible gymnasium courts would be in Pensacola with two (2), three (3) court facilities at University of West Florida. After that, the next largest accessible concentration of courts would be the University of Florida's Florida Gymnasium with three (3) courts or Jacksonville's University of North Florida Arena.

A multi-purpose field house complex also allows flexibility in adding meeting space and specialty sport facilities such as a 200m indoor track, fitness center and more that can generate year round revenue to support operational costs. Listed below, is a small sampling of national and regional events that could be pursued with a competition level multi-court field house.

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Sport/Event	Organization	Location	Year	Economic Impact	Room Nights
Women's & Men's Basketball Nat'l Champ	AAU	Cocoa	2008	$ 57,760	777
AAU, Division II, (10U & 11U) Nat'l Basketball Championship	AAU	Cocoa	2008	$ 2,437,776	4,566
AAU, Division I, (11U) Nat'l Basketball Championship	AAU	Cocoa	2008	$ 2,981,328	3,942
29th Annual N. American Chinese Basketball Championships	NACBA	Broward County	2009	$ 4,670,552	11,064
AAU Girls Basketball 12U Div II National Championships	AAU	Lee County	2009	$ 1,105,650	2,280
AAU Div II Girls 13U Basketball National Championships	AAU	Cocoa	2009	$ 1,628,328	1,890
AAU Div I Boys 11U Basketball Nat'l Championships	AAU	Cocoa	2009	$ 2,604,025	1,582
AAU Div II Boys 11U Basketball Nat'l Championships	AAU	Cocoa	2009	$ 1,051,888	2,030
AAU Division I Boys (11U) Basketball National Championship	AAU	Cocoa	2010	$ 2,240,140	1,491
AAU Boys (11U) Division II Basketball National Championship	AAU	Cocoa	2010	$ 1,181,349	2,051
USA Gymnastics Presidential Classic	USA Gymnastics	Broward County	2008	$ 6,178,040	9,168
USA Gymnastics Women's Jr. Olympics Nat'l Championships	USA Gymnastics	Central Florida	2008	$ 853,632	2,706
USA Gymnastics Region 8 Prep Optional Gymnastics Championships	USA Gymnastics	Panama City	2009	$ 677,202	1,470
Acrobatic Gymnastics Jr. Olympic Nat'l Championships	USA Gymnastics	Central Florida	2010	$ 1,055,818	2,290
Pan American Judo Confederation - Pan American Judo Championships	PAJC	Miami-Dade	2008	$ 439,584	880
US Open Jr. Judo Championships & Training Camp	USA Judo	Broward County	2008	$ 2,103,908	5,625
US Open Junior Judo Championships	USA Judo	Broward County	2009	$ 1,971,170	5,870
US Open Junior Judo Championship	USA Judo	Broward County	2010	$ 1,937,678	5,630
USA Judo Youth & Scholastic Championships	USA Judo	N/A	N/A	N/A	400-500
USA Judo Senior National Championships	USA Judo	N/A	N/A	N/A	500-600
USA Judo National Presidents Cup	USA Judo	N/A	N/A	N/A	250
USA Judo Junior Olympics	USA Judo	N/A	N/A	N/A	700-900
USA Judo US Open	USA Judo	N/A	N/A	N/A	500-600
Florida Citrus Cup	FCC	Miami-Dade	2008	$ 235,080	188
AAU Karate Jr./Sr. National Championships	AAU	Broward County	2009	$ 3,840,608	5,544
USA Karate do Nat'l Championships	USA Karate	Broward County	2009	$ 9,528,594	27,726
USA Taekwondo National Qualifier	USA Taekwondo	Central Florida	2008	$ 203,832	1,176
AAU Taekwondo Team Trials	AAU	Broward County	2008	$ 421,116	1,436
USA Taekwondo National Qualifier	USA Taekwondo	Central Florida	2009	$ 96,507	920
AAU National Taekwondo Championships	AAU	Broward County	2009	$ 5,917,446	17,538
AAU Taekwondo Team Trials	AAU	Broward County	2009	$ 478,344	1,720
AAU Taekwondo Nationals	AAU	Broward County	2010	$ 6,012,834	17,682
USA Taekwondo Jr. Olympics & Sr. Nationals	USA Taekwondo	Central Florida	2010	$ 4,447,852	11,964
NORCECA Boys Youth Volleyball Championships	NORCECA	Miami-Dade	2008	$ 305,216	4,920
USA Volleyball Girls Junior Olympic Championships	USA Volleyball	Miami-Dade	2009	$ 33,819,870	39,976
USA Volleyball High Performance Championships	USA Volleyball	Broward County	2009	$ 1,862,792	14,498

Sport/Event	Organization	Location	Year	Economic Impact	Room Nights
Women's VIII Pan American Cup Championships	NORCECA	Miami-Dade	2009	$ 874,000	625
National Collegiate Volleyball Championships	NCAA	N/A	2012 & 2013	$ 6,006,000	3,500
Rocky Mountain Nationals; Games of Rome	RMN	Central Florida	2008	$ 31,616	338
USA Powerlifting Masters Nationals	USA Powerlifting	Miami-Dade	2008	$ 208,392	504
3rd IBSA World Bench Press& 6th IBSA World Powrlifting Championships	IBSA	Miami-Dade	2008	$ 133,152	246

Another area of consideration regarding indoor multi-purpose space is the North Florida Fairgrounds. If it is decided to move the Fairgrounds complex, the new structure should be designed to handle a number of events including competitive indoor sports. There are several Fairs in Florida that have served as excellent indoor sport venues such as the South Florida Fairgrounds in West Palm Beach, the Miami-Dade County Fair and Expo in Miami and the Volusia County Fair and Expo in Daytona. Currently, the North Florida Fairgrounds has a total of 72,000 square feet of space (6 – 12,000 square foot buildings), which is very limited for use by major sporting events.

The South Florida Fairgrounds has over 128,000 square feet of space, with over 84,000 of which suitable for various indoor sporting events. The Miami-Dade County Fair and Expo facility has over 172,000 square feet of space, with over 160,000 of which suitable for various indoor sporting events. The South Florida Fairgrounds and Miami-Dade County Fair and Expo are great examples of functional large indoor space, if there is consideration of expanding the North Florida Fairgrounds. If not, the Volusia County Fair and Expo is more comparable in size to the North Florida Fairgrounds with approximately 60,000 square feet of indoor space. This facility has a 22,954 square foot arena with seating for 3,000 that makes for an attractive space for a number of indoor sporting events. A similar facility may be a consideration for the North Florida Fairgrounds, if they were to be relocated.

Baseball and Softball Fields

Leon County is rich in regards to the number of Baseball and Softball fields in the area. With 35 Softball fields of varying dimensions spanning over 16 facilities, and 41 Baseball fields distributed among 24 facilities, Leon County has numerous options to host Softball and Baseball events. With FAMU, FSU and TCC, there are three (3) Stadium fields for Softball and three (3) for Baseball. Softball has a total of 20 fields that are categorized as Competition Facilities and 12 Auxiliary fields. Baseball has a total of 12 fields that are categorized as Competition Facilities and 31 Auxiliary fields. Note: the eight (8) Softball fields at Messer Park and the five (5) Softball fields at Tom Brown Park can be converted for Baseball with portable mounds. With recent upgrades, Messer Park is Tallahassee's premier Softball facility. Baseball, however, has several smaller complexes, some in need of renovations. The Leon County area is also lacking a facility with multiple high school / college regulation fields.

The recommendation of this report is to consider a Baseball complex, first focusing on a wheel of 4 – 5 high school / college regulation fields. There is a large market for 14U+ / high school competition as well as college / adult tournaments. The secondary focus of this complex would be to consider an 8 – 12 field youth Baseball complex. Grass infields would be preferable, but using clay (softball) fields that can be converted to Baseball would allow more flexibility in use. The benefit to considering grass fields would be that the facility could truly be marketed as Tallahassee's premier Baseball park. In order to design a truly competitive facility of this kind, support facilities and equipment must be taken into consideration such as scoring towers / areas, restrooms, officials / event management areas, scoreboards, portable fences, mounds and parking.

There are numerous Baseball (and Softball) facilities throughout Florida with varying dimensions and numbers of fields. The most common baseball complex design is that with youth fields, typically little league or pony league dimensions. The multiple regulation fields would set such a complex apart from most others, since it is not common to find 4 – 5 regulation Baseball fields in one location. Between Gainesville, Jacksonville, Panama City and Pensacola, the largest number of regulation Baseball fields with grass infields would be the Santa Rosa Sportsplex in Pensacola, with four (4) regulation baseball fields and grass infields. The largest overall Baseball/Softball complex, between the same four cities, would also be Santa Rosa Sportsplex with 16 total fields, half are clay and the other half are grass infields. Newberry's new complex will rival the Santa Roasa Sportsplex once complete, with 16 fields of its own, each with artificial infields and portable mounds and bases. Listed below, is a small sampling of national and regional events that could be pursued with the recommended Baseball complex.

Sport/Event	Organization	Location	Year	Economic Impact	Room Nights
USSSA AA World Series	USSSA Baseball	Pensacola	2008	$ 1,764,112	3,734
Big League Baseball Regional Tournament	Big League Baseball	Broward County	2008	$ 730,512	1,988
World Baseball Classic	WBCI	Miami-Dade	2009	$ 16,285,400	12,600
Big League Regional Baseball Tournament	Big League Baseball	Broward County	2009	$ 680,735	2,016
AAU Div I & II Boys 15U & 16U Baseball Nat'l Championships	AAU	Cocoa	2009	$ 1,086,536	1,904
USSSA AA World Series	USSA Baseball	Pensacola	2009	$ 1,829,807	4,228
(Div. I & II- 15U, 16U & 17-19U) National Championship	AAU	Cocoa	2010	$ 1,210,400	1,176
NCBA/NCSA East Spring Training Showcase	NCBA/NCSA	N/A	2012	N/A	1,100
AAA World Series	Dixie Baseball	Bartow	2012	$596,000	2,000
USSSA AA World Series	USSSA Baseball	Pensacola	2008	$ 1,764,112	3,734
USSSA AA World Series	USSSA Baseball	Pensacola	2009	$ 1,829,807	4,228

Other Comments & Recommendations

While conducting facility analysis and community interviews, the Foundation has developed a few additional comments / recommendations for consideration.

1) There are several facilities in Leon County that have potential to serve as outstanding competition facilities if an investment was focused on upgrading their appearance, support facilities, field of play and considering additions. For example, Morcom Aquatic Complex, owned by FSU, is an excellent aquatics facility able to accommodate numerous sports. However, it is limited to what events it can host, due to a lack of seating. An investment in a 1,500 seat grandstand would open up the facility to a number of potential events.
2) Leon County Parks & Recreation indicated there is discussion regarding constructing a new park on the NE section of Tallahassee. The Foundation recommends taking sport competition into consideration when designing this facility and to seek input from Visit Tallahassee on facility attributes that separate recreation from competitive facilities.
3) The Foundation is aware of the KCCI Capital Sport Initiative's interest in Appalachee Regional Park and recognizes its outstanding efforts. Appalachee Regional Park currently has 4 multi-purpose fields, an outstanding cross country course and a radio control airplane park. Though the facility has potential for growth, no recommendations have been placed in this report due to the complexities and limitations involved with developing that property.

Conclusion

Sport in Florida is a major industry and has significant impact on tourism in communities investing in this market. With 21 Sports Commissions in Florida and many more nationwide, sport tourism is becoming more competitive each year as communities are beginning to realize their potential in using sport to drive their economic development efforts, especially in today's economy. In addition to investing in marketing and attracting events, several areas are also looking to increase their inventory of competition facilities.

The Leon County area has many competitive multi-purpose and specialty facilities, some mentioned in this report, and has a positive community partnership between facility owners and Visit Tallahassee. Many outstanding facilities were not specifically mentioned in this report, since the focus of the study is to conduct a needs assessment. The overall inventory of sport facilities in the community is good for a smaller Florida market and the area is very unique due to the presence of two major universities and one community (state) college, providing for some outstanding competitive collegiate venues. A common trend found while conducting this study is the large number of facilities that do not indicate hosting outside events as their primary objective / function, since they have been developed for another purpose. This can present a challenge of gaining accessibility to venues, impeding Visit Tallahassee's efforts in attracting major sporting events to the area. In addition, the area's sport facility inventory is lacking in certain types of sport venues that also limits the sport markets in which Visit Tallahassee is able to reach.

The Florida Sports Foundation recommends that Visit Tallahassee consider investing in a competition facility(s) with the primary purpose of hosting events that drive tourism to the community, while strategically balancing its current facility inventory. In no particular order or consideration of priorities, the recommendations were as follows.

FLORIDA SPORTS

LEON COUNTY FACILITY NEEDS ASSESSMENT: MARCH 2011

Facility Type	Description	Estimated Acreage/Square Ft.
Multi-purpose Fields	Multi-field sport complex with no less than 12 fields with proper dimensions to host a variety of sports. Configuration of fields should allow for the most flexibility possible for combining field space. Special consideration should be made for support facilities to include restrooms, concessions, meeting rooms, team restrooms, equipment storage, shade, scoreboards, lights, seating, parking and sport specific equipment.	35 – 45 Acres
Multi-court Gymnasium	Multi-purpose gymnasium with no less than six (6) regulation basketball courts and lining for other sports. Special consideration should be made for temperature control & airflow, flooring type, ceiling height, lighting, appropriate seating for each court, auxiliary sport or fitness facilities within the structure, restrooms, scoreboards, nets and goals, meeting rooms, office space, locker rooms, appropriate lighting, storage, concessions and parking.	72,000 square feet
Baseball Complex	Baseball complex to include 4-5 regulation high school/college fields and 8-12 youth fields, all with grass infields. Special consideration should be made for fence line distances, base path and pitching distances, lights, seating at each field, parking, concessions, meeting rooms, equipment storage, shade, restrooms, team restrooms, scoreboards, batting cages and specialty sport equipment.	40 – 50 Acres

Multi-purpose Indoor Space	Recommendation contingent on relocation of North Florida Fairgrounds. If new structures are to be built, consideration should be made on flooring type, ceiling height, aesthetics, seating and temperature control.	23,000 square feet

The Foundation is prepared to assist Visit Tallahassee, as an industry partner of the Foundation, in conducting any additional research needed while considering any of these recommendations. Any questions regarding this report can be directed to the Florida Sports Foundation, Attn: Stephen V. Rodriguez, 2930 Kerry Forest Parkway, Suite 101, Tallahassee, Florida 32309, 850-488-8347.