

# **Tourist Development Council**

**Seminole County Services Building**

**January 19, 2023**



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**Tourist Development Council**  
**January 19, 2023 Meeting Agenda**  
**Seminole County Services Building**  
**Room 3024**

- |       |  |   |
|-------|--|---|
| I.    | Call to Order                                      | Chair                                   |
|       | Pledge of Allegiance followed by Moment of Silence |   |
| II.   | Welcome and Introductions                          |   |
| III.  | Approval of November 2022 TDC Minutes*             |   |
| IV.   | Orlando North Tourism Updates                      | Tricia Johnson                          |
|       | a. Tourism Team Presentation                       | Karen Aplin, Danny Trosset, Gui Cunha   |
| V.    | Visitor Study Update                               | Erin Dinkel<br>Downs & St. Germain      |
| VI.   | Indoor Complex Feasibility Study                   | Rob Hunden<br>Hunden Strategic Partners |
| VII.  | Tourism Improvement District Feasibility Study     | Tiffany Gallagher<br>Civitas            |
| VIII. | Destination Management Accreditation Program       | Jack Wert<br>Wert Marketing Group       |
| IX.   | Central Florida Zoo Update                         | Richard Glover<br>Central FL Zoo        |
| X.    | Old Business                                       | Chair                                   |
| XI.   | New Business                                       |   |
| XII.  | Adjourn  |   |

**Next Meeting**

Thursday, April 20, 2023  
Seminole County Government, Room 3024  
1101 East First Street, Sanford, FL 32771

*\* These items need formal action by the TDC.*

*PERSONS WITH DISABILITIES NEEDING ASSISTANCE TO PARTICIPATE IN ANY OF THESE PROCEEDINGS SHOULD CONTACT THE HUMAN RESOURCES DEPARTMENT, ADA COORDINATOR 48 HOURS IN ADVANCE OF THE MEETING AT 407-665-7941.*

*PURSUANT TO FLORIDA LAW, THE PUBLIC HAS THE RIGHT TO BE HEARD ON ALL PROPOSITIONS. PUBLIC COMMENT TIME ON PROPOSITIONS SHALL BE THREE (3) MINUTES FOR INDIVIDUALS AND SIX (6) MINUTES FOR GROUP REPRESENTATIVES. PROPER DECORUM WILL BE OBSERVED.*



# ORLANDO NORTH SEMINOLE COUNTY

Tourist Development Council Meeting  
November 17, 2022

**Meeting called to order by Chair Elizabeth Brown at 3:05 pm**

***A quorum was established***

**In Attendance:**

- Chairman Elizabeth Brown, President, TBI US Operations Inc./OSI Inc. (SFB)
- Commissioner Lee Constantine, Seminole County Board of County Commissioners, District 3
- Commissioner Sarah Reece, City of Altamonte Springs CALNO Representative
- Bruce Skwarlo, General Manager, Orlando Marriott Lake Mary
- Don Dougherty, General Manager, The Westin Lake Mary, Orlando North
- Jamie Ross, General Manager, Residence Inn Orlando Lake Mary
- Erik Ducharme, Director of Sales, Top Golf Lake Mary
- Judith Derosiers, Mall Director, Oviedo Mall

**Pledge of Allegiance and Moment of Silence**

**Introductions**

**Approval of August 28, 2022 Minutes**

**Motion:** Commissioner Sarah Reece

**Second:** Bruce Skwarlo

**Vote:** Unanimous

**Tourism Update**

*Tricia Johnson, Deputy County Manager*

- County Manager Search Update
- Seminole Forever – January TDC Meeting update
- TID Feasibility Study will begin this month
- Elizabeth Brown and Patrick Austin’s last meeting & award presentation

**Leisure Tourism Update**

*Karen Aplin, Tourism Director*



- I Do Orlando North YouTube series has launched
- Orlando Marriott Lake Mary family travel shoot has concluded
- Caroline Wells & CJ Walker NIL shoots will be completed prior to the next TDC
- LessONs YouTube & Reels/TikTok series will be launched prior to next TDC
- Featured events: Orlando Air Show, Asian Lantern Festival, Novemberfest, Sporting Event Highlights (Mic'd Up)
- Over 36 shoots completed since last TDC
- Quarterly Giveaway Launch
- Itinerary Campaign: Signage up at sports complexes, new campaign, & looking to add accessible travel options

### **Sports Tourism and Economic Development Update**

*Gui Cunha, Administrator, Economic Development and Tourism*

- Expect economic impact to grow throughout the next fiscal year
- Over 50 events this quarter
- Over \$65mil eco impact this Fiscal Year
- Strong September ADR
- We expect Vacation rentals legislation forthcoming, softening supply

### **Central Florida Zoo Update**

*Richard Glover, CEO*

- Attendance down - closed 28 days after Hurricane Ian
- Reopened for second weekend for Zoo Boo Bash
- VyStar Credit Union sponsored a free day for their patrons
- Veterans Day at the zoo was rescheduled December 3 & 4 due to second Hurricane/TS Nicole
- Road was flooded due to Hurricane Ian for 3 + weeks
- Reopened Oct 26.
- \$300K worth of damages (\$17K for daily operations)
- They are fundraising and working on FEMA application for damage costs
- Asian Lantern Festival- runs for 40 days
- Staff remained 24/7 at zoo during hurricanes
- Zoo to send rack cards to hoteliers

### **Evok Advertising**

*Lindsay Hayhurst, Account Executive*

- Top keywords: Asian Lantern Festival in top 3 search terms
- Digital Ads & Website: Sports & Play campaign- overperforming MoM - 17K impressions
- Leisure & Do - 4K clicks Sept to 5K Oct.
- Website traffic: over performing compared to last year

- Play traffic- softball fields & soccer complex
- Target demo: almost 100% are coming to the site on mobile, male
- Itinerary campaign: gearing up for a new campaign

### **Visitor Study Update**

*Erin Dinkel, Downs & St. Germain*

- Impact of tourism- Almost 500K visitors, TDT \$1.5mil this quarter
- Will provide full visitor breakdown
- Will provide demographics of those surveyed

### **Tourism Improvement District Feasibility Study Update**

*Tiffany Gallagher, Civitas Advisors*

- Will be working with us for over 3 months to complete the feasibility study
- Want to work with TDC and talk about building out a framework
- All-or-none plan for hotels – set up to benefit all hotels and the entire district, not just a portion.

### **Indoor Complex Feasibility Update**

*Ryan and Lexie Hunden, Hunden Strategic Partners*

- Qualifications show other case studies for indoor facilities along with phasing options
- RFP based on previous County Manager
- First draft to be presented at the January 2023 TDC meeting

### **Old Business**

None

### **New Business**

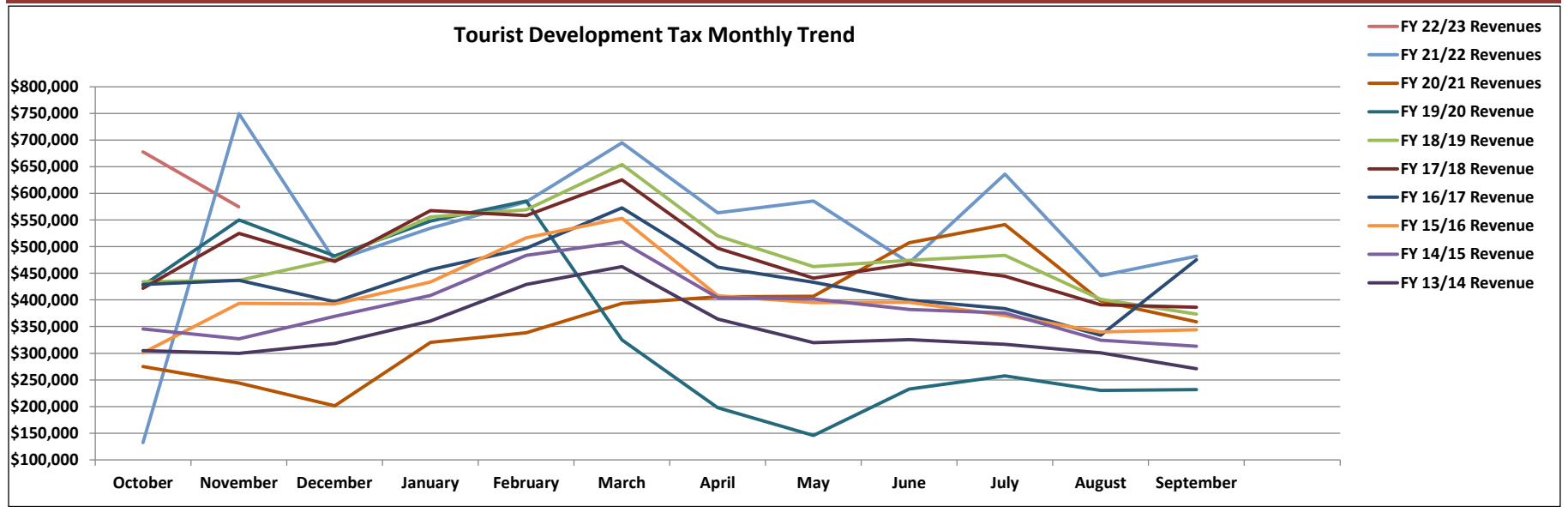
- Commissioner Constantine's last meeting as TDC liaison, discussion on a booth at the Florida Association of Counties conference
- Commissioner Constantine was recognized as the Public Service of the Year by CFHLA

***Meeting adjourned at 4:51pm***

**Seminole County, Florida**  
**TOURIST DEVELOPMENT TAX**  
 Fiscal Year 2022/23 Revenue Report

Monthly Collections	HISTORY										CURRENT FISCAL YEAR			COMPARISON	
	FY 2013/14	FY 2014/15	FY 2015/16	FY 2016/17	FY 2017/18	FY 2018/19	FY 2019/20	FY 2020/21	FY 2021/22	FY 2022/23			FY 22/23 vs FY 21/22		
	Total Collections	Total Collections	Total Collections	Total Collections	Total Collections	Total Collections	Total Collections	Total Collections	Total Collections	Original 3 Cents	2 Cents	Total Collections	Month Over Month/ YTD Over YTD Change In Collection		
October	304,877	345,553	300,862	428,948	421,671	434,438	426,810	274,906	132,466	406,719	271,146	677,865	545,399	411.7%	
November	299,750	326,885	393,635	436,732	524,762	436,992	550,273	244,092	749,463	344,978	229,985	574,963	(174,500)	-23.3%	
December	318,536	369,173	392,605	396,424	472,255	476,548	482,643	201,297	473,861						
January	360,507	408,691	433,835	456,915	567,724	555,919	548,293	320,404	534,395						
February	429,247	483,661	516,610	497,136	558,093	569,125	585,371	338,387	583,915						
March	462,593	509,149	552,988	572,832	625,272	654,013	324,781	393,366	694,754						
April	364,161	404,355	407,783	461,492	497,187	520,483	197,530	405,926	563,558						
May	320,090	401,954	395,282	432,965	440,873	462,655	145,826	406,821	585,892						
June	325,397	382,227	395,373	399,489	467,655	474,337	232,610	507,262	469,931						
July	316,960	375,695	370,960	383,585	444,707	483,878	257,661	541,239	635,873						
August	300,955	324,474	339,798	333,761	391,058	401,322	230,144	397,999	445,388						
September	271,010	313,288	343,950	475,615	386,395	373,474	231,559	359,119	482,358						
<b>Total</b>	<b>4,074,084</b>	<b>4,645,106</b>	<b>4,843,681</b>	<b>5,275,894</b>	<b>5,797,652</b>	<b>5,843,184</b>	<b>4,213,500</b>	<b>4,390,817</b>	<b>6,351,853</b>	<b>751,697</b>	<b>501,131</b>	<b>1,252,828</b>	<b>370,899</b>	<b>21.1%</b>	
	11.40%	14.02%	4.27%	8.92%	9.89%	0.79%	-27.89%	4.21%	44.66%	<b>Budgeted Revenue</b>					
	% Chg from Prior Year	% Chg from Prior Year	% Chg from Prior Year	% Chg from Prior Year	% Chg from Prior Year	% Chg from Prior Year	% Chg from Prior Year	% Chg from Prior Year	% Chg from Prior Year	<b>3,301,390</b>	<b>2,200,927</b>	<b>5,502,317</b>			
										<b>Estimated Revenue</b>					
										<b>3,900,000</b>	<b>2,600,000</b>	<b>6,500,000</b>			
										<b>% Change From PY</b>					
												<b>2.33%</b>			

<b>Revenue Per Penny</b>	<b>814,817</b>	<b>929,021.24</b>	<b>968,736.20</b>	<b>1,055,178.80</b>	<b>1,159,530.40</b>	<b>1,168,636.78</b>	<b>842,700</b>	<b>878,163</b>	<b>1,270,371</b>	<b>250,566</b>
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# Hotel STR Report

Month 2022	Occupancy (%) (YOY)	ADR (\$) (YOY)	Rev PAR (\$) (YOY)
October	78.3 (17.4)	112.68 (20.8)	88.17 (41.9)
<i>Forecast</i>	<i>71.4</i>	<i>94.87</i>	<i>67.7</i>
November	73.4 (10.3)	112.10 (15.9)	82.29 (27.8)
<i>Forecast</i>	<i>70.7</i>	<i>98.68</i>	<i>69.78</i>
December*			
<i>Forecast</i>	<i>69.8</i>	<i>99.05</i>	<i>69.16</i>

\*December STR Report has not arrived. Expecting the December 2022 Monthly Trends Report to arrive by January 20<sup>th</sup>, 2023.



# Comp Set

Current Month - October 2022 vs October 2021													
	Occ %		ADR		RevPAR		Percent Change from October 2021						
	2022	2021	2022	2021	2022	2021	Occ	ADR	RevPAR	Room Rev	Room Avail	Room Sold	
	Alachua County, FL	64.4	61.0	147.84	106.33	95.19	64.83	5.6	39.0	46.8	50.5	2.5	8.2
Orange County, FL	79.4	60.3	165.32	136.07	131.21	82.08	31.6	21.5	59.8	62.4	1.6	33.7	
Osceola County, FL	72.1	52.2	121.23	101.73	87.37	53.11	38.1	19.2	64.5	71.6	4.3	44.0	
Polk County, FL	74.9	64.0	122.68	110.20	91.86	70.56	16.9	11.3	30.2	31.3	0.8	17.9	
Volusia County, FL	57.4	55.3	135.34	128.58	77.75	71.05	4.0	5.3	9.4	7.6	-1.7	2.2	
Lake County, FL	76.5	65.1	109.63	96.44	83.90	62.78	17.6	13.7	33.7	28.0	-4.3	12.6	

Current Month - November 2022 vs November 2021													
	Occ %		ADR		RevPAR		Percent Change from November 2021						
	2022	2021	2022	2021	2022	2021	Occ	ADR	RevPAR	Room Rev	Room Avail	Room Sold	
	Alachua County, FL	58.0	61.3	122.89	115.70	71.29	70.93	-5.4	6.2	0.5	3.0	2.5	-3.0
Orange County, FL	74.3	65.0	160.31	140.78	119.10	91.56	14.2	13.9	30.1	31.4	1.0	15.4	
Osceola County, FL	65.4	54.7	122.58	102.73	80.15	56.19	19.5	19.3	42.6	50.1	5.2	25.8	
Polk County, FL	64.5	62.7	130.39	107.37	84.12	67.35	2.9	21.4	24.9	26.0	0.8	3.7	
Volusia County, FL	50.9	50.4	131.92	135.72	67.09	68.45	0.8	-2.8	-2.0	-6.6	-4.7	-3.9	
Lake County, FL	73.0	70.8	114.38	100.09	83.51	70.88	3.1	14.3	17.8	12.8	-4.3	-1.3	



# Vacation Rental Key Data Report

Month 2022	Occupancy (%)	ADR (\$)	Rev PAR (\$)
October	56%	\$115	\$65
November	53%	\$114	\$60
December	59%	\$119	\$70





# Vacation Rental Key Data Report

Total listings

906

Total sleeps

4,289

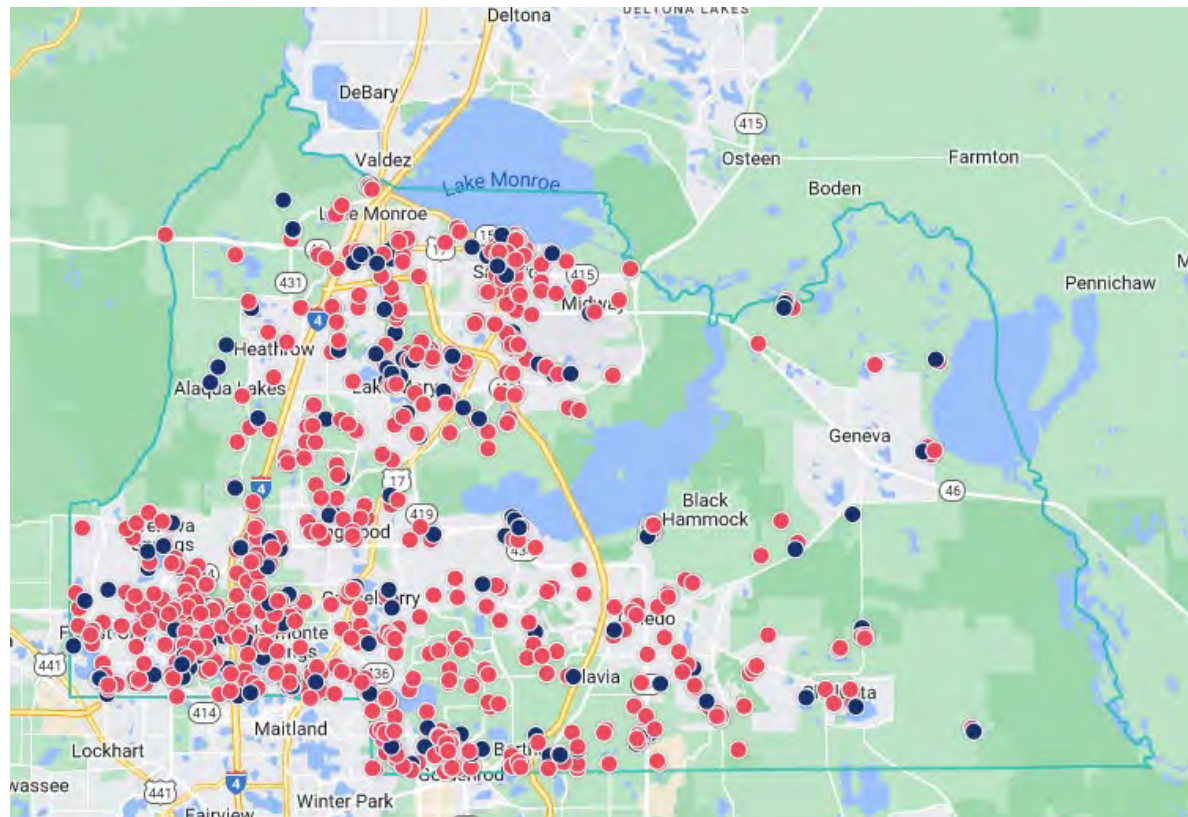
Rental channel

712 (79%)

Airbnb

194 (21%)

Vrbo



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# Fiscal Year Comparison

FY '21/'22 Actuals					
Location	# of Events	Teams	Visitors	Room Nights	Eco Impact
Sports Complex	50	3,345	132,529	24,811	\$44,137,318
All Other Venues	47	1,709	81,861	16,865	\$21,191,987
<b>Total</b>	<b>97</b>	<b>5,054</b>	<b>214,390</b>	<b>41,676</b>	<b>\$65,329,305</b>

FY '22/'23 Projections					
Location	# of Events	Teams	Visitors	Room Nights	Eco Impact
Sports Complex	52	3,311	130,822	28,572	\$42,319,254
All Other Venues	39	1,907	89,579	17,472	\$23,055,851
<b>Total</b>	<b>91</b>	<b>5,218</b>	<b>220,401</b>	<b>46,044</b>	<b>\$65,375,105</b>



# Sports Complex Fiscal Year Recaps

Sports Complex Actuals					
Fiscal Year	# of Events	Teams	Visitors	Room Nights	Eco Impact
'15/'16	27	1,523	74,458	6,437	\$13,174,148
'16/'17	55	3,493	132,021	11,570	\$18,900,000
'17/'18	64	3,086	146,019	17,093	\$21,820,116
'18/'19	57	3,149	147,854	23,670	\$25,349,765
'19/'20	43	1,811	82,658	17,329	\$16,046,471
'20/'21	54	3,304	125,485	27,160	\$31,145,048
'21/'22	50	3,345	132,529	24,811	\$44,137,318
<b>Total</b>	<b>350</b>	<b>19,711</b>	<b>841,024</b>	<b>128,070</b>	<b>\$170,572,866</b>





# Other Venues Fiscal Year Recap

## All Other Venues Actuals

Fiscal Year	# of Events	Teams	Visitors	Room Nights	Eco Impact
'16/'17	8	265	11,338	954	\$1,405,465
'17/'18	48	1,939	83,848	17,163	\$16,585,948
'18/'19	53	1,955	90,270	17,071	\$12,200,099
'19/'20	40	1,626	78,090	14,668	\$16,138,484
'20/'21	50	1,882	92,023	17,152	\$14,032,180
'21/'22	47	1,709	81,861	16,865	\$21,191,987
<b>Total</b>	<b>246</b>	<b>9,376</b>	<b>437,430</b>	<b>83,873</b>	<b>\$81,554,163</b>



# Sports Tourism Update – Sports Complex

October-November Actuals			
Month	# of Events	Room Nights	Eco Impact
October	3	1,361	\$2,673,566
November	2	1,595*	\$2,747,846
<b>Total</b>	<b>5</b>	<b>2,956*</b>	<b>\$5,421,412</b>



Monthly Projections			
Month	# of Events	Room Nights	Eco Impact
December	4	2,810	\$4,000,827
January	3	2,085	\$2,935,335

\*pending Perfect Game room night verification

# Sports Tourism – All Other Venues

## October-November Actuals

Month	# of Events	Room Nights	Eco Impact
October	5	1,475	\$2,077,816
November	2	592	\$2,486,717
<b>Total</b>	<b>7</b>	<b>2,067</b>	<b>\$4,564,533</b>



## Monthly Projections

Month	# of Events	Room Nights	Eco Impact
December	6	1,450	\$1,247,742
January	5	4,562	\$5,064,986



# Upcoming Events

Organization	Event	Date	Location	Teams	Visitors	Room Nights	Eco Impact
ECNL	ECNL Girls/Boys	January 6-8, 2023 January 21-23, 2023	Seminole Soccer Complex/ Sylvan Lake Park	176 168	13,172 12,296	2,800 2,400	\$2,559,678 \$2,043,013
NFHCA	NFHCA Field Hockey	January 13-15, 2023	BOOMBAAH Sports Complex	90	4,200	1,500	\$2,000,000
Florida Tech	Crimson Classic	February 10-12, 2023	Soldiers Creek	12	876	200	\$201,829
Perfect Game, Inc	Florida Winter Nationals	February 24-26, 2023	BOOMBAAH Sports Complex	84	3,192	750	\$1,135,200
Seminole State College	CMI Softball Games	February 25-26, 2023	Soldiers Creek	17	1,080	150	\$191,838
HoganLax	Florida Team Training	March 6-23, 2023	BOOMBAAH Sports Complex	20	837	478	\$484,256



**HOGANLAX**



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# Perfect Game – Main Event Showcase Recap



**PERFECT GAME**

## Stats

**Athletes: 943**

**Visitors: 2,902**

**Eco Impact: \$1,452,277**



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**ORLANDO NORTH  
SEMINOLE COUNTY**





Greater Orlando Sports Commission - Seminole County TDC Report

Updated: January 9, 2023

FY 22/23 Calendar							
Event	Contract Status	Contract Term	Event Date	Athletes	Total Visitors	Projected Room Nights	Projected Eco Impact
Girls ECNL Regional League Florida National Event	Recurring	2021-2023	January 6-8, 2023	893	3,619	2,301	\$1,894,013
Boys ECNL Florida National Event	Recurring	2021-2023	January 21-23, 2023	1,380	5,436	2,456	\$2,985,738
HoganLax Florida Team Training and Orlando Jamboree	Renewal	2023-2024	March 4-25, 2023	435	837	1,186	\$484,256
FHSAA Tennis State Championships	Recurring	2021-2023	April 24-28, 2023	706	1,497	635	\$947,880
Florida Rush Champions Cup	Renewal	2023	May 19-21, 2023	432	486	599	\$402,660
<b>Totals</b>				<b>3,846</b>	<b>11,875</b>	<b>7,177</b>	<b>\$6,714,547</b>

Color Key:

*Event has not occurred*

*Event completed*

*Event completed, not closed out*

*Event postponed*

*Event cancelled*

Business Development Status			
Event	Dates/Years	Possible Venue(s)	Status
Copa Rayados Internacional	Thanksgiving Week of 2021, 2022, 2023, 2024	Seminole Soccer Complex, Sylvan Lake Park, Boombah Sports Complex	Not Awarded
USA Softball U-16 National Championships	July of 2022	Boombah-Soldiers Creek Park, Seminole County Softball Complex, Merrill Park	Not Awarded
Concacaf U-17 Qualifier	August of 2022 and 2023	Seminole Soccer Complex	Not Awarded in 2022 Researching Dates in 2023
USA Artistic Swimming Convention	September of 2022, 2023, 2024	Orlando Marriott Lake Mary, Westin Lake Mary	Not Awarded
USA Artistic Swimming FINA Judges School	October of 2022, 2023, 2024	Orlando Marriott Lake Mary, Westin Lake Mary	Not Awarded
USA Artistic Swimming National Judges School	December of 2022, 2023, 2024	Orlando Marriott Lake Mary, Westin Lake Mary	Not Awarded
USYS National League Elite 64	December of 2022	Boombah Sports Complex, Seminole Soccer Complex, Sylvan Lake Park	No Field Availability
US Soccer Team Training	February of 2023	Seminole Soccer Complex	Researching
HoganLax Team Training and Orlando Jamboree	March of 2023	Boombah Sports Complex	Bid Awarded
Prep Baseball Report Canadian Spring Training	March of 2023	Boombah Sports Complex	No Field Availability
SWAC Baseball Conference Championships	May of 2023	Boombah Sports Complex	No Field Availability
Athletes Unlimited AUX Softball	June of 2023	Historic Sanford Memorial Stadium, Boombah Soldiers Creek	No Field Availability
Flag Football World Championship Tour	Various Dates in 2023	Boombah Sports Complex, Seminole Soccer Complex, Sylvan Lake Park	No Field Availability in 2022, 2023 Researching Dates in 2024
NCAA DII Women's Tennis Festival Championship	May of 2024	Sanlando Park	Bid Awarded
NCAA DII Men's Tennis Festival Championship	May of 2024	Sanlando Park	Bid Awarded
NCAA DII Softball Festival Championship	May of 2024	Boombah-Soldiers Creek Park	Bid Awarded
NCAA DII Women's Tennis Championship	May of 2025	Sanlando Park	Bid Awarded
NCAA DII Men's Tennis Championship	May of 2025	Sanlando Park	Bid Awarded
USA Field Hockey Festival	Thanksgiving Week of 2025	Boombah Sports Complex	Awaiting RFP
World Cup 2026	Summer of 2026	Sylvan Lake Park, Seminole Soccer Complex	Not Awarded



# Seminole County Sports Facility Feasibility & Pro Forma Study

Market Findings

■ January 19, 2023







# Table of Contents

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1. Executive Summary
2. Proposed Project Profile & Site Analysis
3. Economic, Demographic & Tourism Analysis
4. Local Sports Facility Supply & Demand Analysis
5. Regional Sports Facilities Analysis
6. Sports Tournaments & Opportunity Analysis
7. Support Amenities: Hotel & Restaurant Analysis
8. Benchmark Facilities
9. Market Findings & Recommendations

## Next Steps:

1. Pro Forma
2. Economic, Fiscal & Employment Impact Analysis



# 01

## Executive Summary

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# Situational Overview

Seminole County (County or Client) engaged the Hunden Strategic Partners Team (HSP or Team) to conduct a financial feasibility and pro forma study for a new indoor sports complex (Project) in Seminole County, Florida. The Hunden Strategic Partners Team, which includes architects at Convergence Design, aims to determine the market demand for sports and events, programming options, similar case studies, construction and operational cost projections, and funding options as they relate to the proposed Project.





# Key Questions

---

- Is there an opportunity for an indoor sports facility to improve sports tourism in Seminole County? If so, what components are recommended?
- What is the current situation as it pertains to sports in Seminole County and the greater Orlando market?
- What is the viability of the Project to regularly compete for and host regional, sub-regional, or national tournaments and other events that will bring visitors to Seminole County?
- What does the current local hotel supply look like? Is there a future need for additional hotel development near the Project?
- What are the financial projections for the Project? What is the estimated cost of development?
- What is the economic impact that the Project will generate?



# SWOT Analysis

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The following SWOT analysis details the strength, weaknesses, opportunities and threats related to the proposed youth sports facility in Seminole County, Florida.

## STRENGTHS



- Growing population and strong local/regional market
- Central location in Florida and 35 miles from downtown Orlando
- No major competitive indoor facilities within Seminole County
- Proven success with Boombah Sports Complex

## OPPORTUNITIES



- Tournament-grade indoor sports facility
- Unobstructed function space that could serve as an emergency shelter or space for graduations for the County
- Private sector partnerships with tournament operators
- Additional commercial development surrounding the airport and sport complexes

## WEAKNESSES



- Limited full-service hotels in the County and no hotels within 5 miles of the Project site
- Lack of development around the proposed Project
- Losing tourism dollars to Orange County and the Orlando market

## THREATS



- Other proposed, competing facilities within the Florida market
- Private indoor facilities in neighboring counties and similar destination cities
- Competing interests between club and recreational usage given the rapid residential growth

# How to Capitalize on Strengths & Mitigate Weaknesses



The following key headlines outline ways Seminole County can both leverage their strengths and mitigate some of their weaknesses with the proposed youth sports complex.

## Strong Local/Regional Demand

Youth sports continue to grow in the area as the residential population continues to increase. Indoor clubs and tournament operators have expressed that the lack available court supply has restricted growth of their programs and limits tournament sizes. Seminole County and the greater Orlando market have a strong demand base that can fill court space throughout the week within a large sports complex and draw tournaments on the weekends.

## Weak Supply Within Florida

A high-quality indoor facility with ample court space for tournaments is in need for Central Florida. The majority of the large tournaments are held at the Convention Center with the remainder split between a handful of facilities. The local and regional supply is extremely limited for the demand and population of the state. A regional facility in Seminole County would recapture demand that currently leaves the market for tournaments and induce tournament visitation from all over the country.

## Destination Appeal

Seminole County has the ability to leverage its geographical location between the biggest theme parks found in Orlando and beaches on the east coastline. A new indoor sports facility will add to the youth sports destination that Boombah has started and give Seminole County a competitive advantage when appealing to tournament operators. A youth sports destination that is also close to well-known family entertainment will enhance its attractiveness for larger regional and national tournaments.

# Headlines – Seminole County Youth Sports

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The following bullets summarize the key findings and headlines. In order to assess the viability of any project and make informed recommendations, there are key elements that must be considered.

- **Facility and Site Needs.** General site parameters for a successful youth sports facility include availability of land for current and potential future development, accessibility, proximity to hotel/restaurant nodes and flat topography. Roughly 15-20 acres are typically needed for an indoor facility, depending on future expansion and parking. In order to appeal to tournament operators, it is ideal that an indoor facility has onsite amenities that can accommodate spectators and teams in their down time.
- **Support Amenities.** Nearby hotel and restaurant nodes not only help the local area but also serve as a selling point for larger tournaments that will ultimately attract overnight visitors. The industry is driving spending and overnight stays for all types of municipalities around the country. While many industries that fall under the tourism umbrella were hurt by the COVID-19 pandemic, the youth sports industry has stayed consistent in terms of driving economic impact for municipalities.
- **The Supply & Demand.** There is significant demand for indoor space in the greater Orlando area. Currently all major tournaments are being held at a select few facilities aside from the Orange County Convention Center. However, given the Convention Center's popularity among conventions and meetings on a national basis, there is a limited number of weekends available for youth sports tournaments. Local facilities claim that a lot of their major tournaments come from turned away business from the Convention Center and ESPN, which still can not be fully accommodated with the current local supply.
- **Case Studies.** Flexibility is a major ingredient to the success of youth sports developments. The ability to host a diverse mix of sporting events, and potentially non-sporting events will enhance the chances of a facility's success. Key on-site amenities that complement a major youth sports complex include food and beverage offerings, lounge/play areas for participants and fans, community space and physical therapy/sports performance space.

# Recommendations

The adjacent table details the recommended programming for the Project. Based on the analysis of the youth sports market in the greater Orlando area, the region and interviews with market experts, tournament organizers and other stakeholders, HSP recommends 9 hardwood basketball courts with the ability to configure into 18 volleyball courts. Included in the nine-court recommendation is a championship style court that has retractable seating for spectators. The championship court would be separated from the remaining courts to enhance the exclusivity factor. This would be a unique asset that is not currently found in the local supply and would help to attract national tournaments of a higher caliber.

Onsite amenities are the key to success for the longevity of this facility to become an established tournament destination. This will also help the facility’s ability to host non-sports related events when needed.

Seminole County Indoor Sports Facility Recommendations		
Feature	Unit	Unit Size
Recommendation		
Indoor Courts (Hardwood)	Courts	
Basketball	Courts	9
Volleyball	Courts	18
Seating (Minimum)		900
Minimum Parking		900
<i>Other Key Amenities:</i>		<i>Building Needs:</i>
Concession/Food Service Area		Team/Changing Rooms
Restaurant/Café		Ample Parking
Stage		Offices
Play Area/Lounge Space		Public Restrooms
Performance/Physical Therapy Area		Storage
Meeting Rooms		First Aid Station
Lobby Space		
Source: HSP, Convergence Design		



**LEGEND:**

- 1 Development Site
- 2 Overflow Parking
- 3 Parking
- 4 Play
- 5 Indoor Sports Facility
- 6 Detention



Concept Site Plan

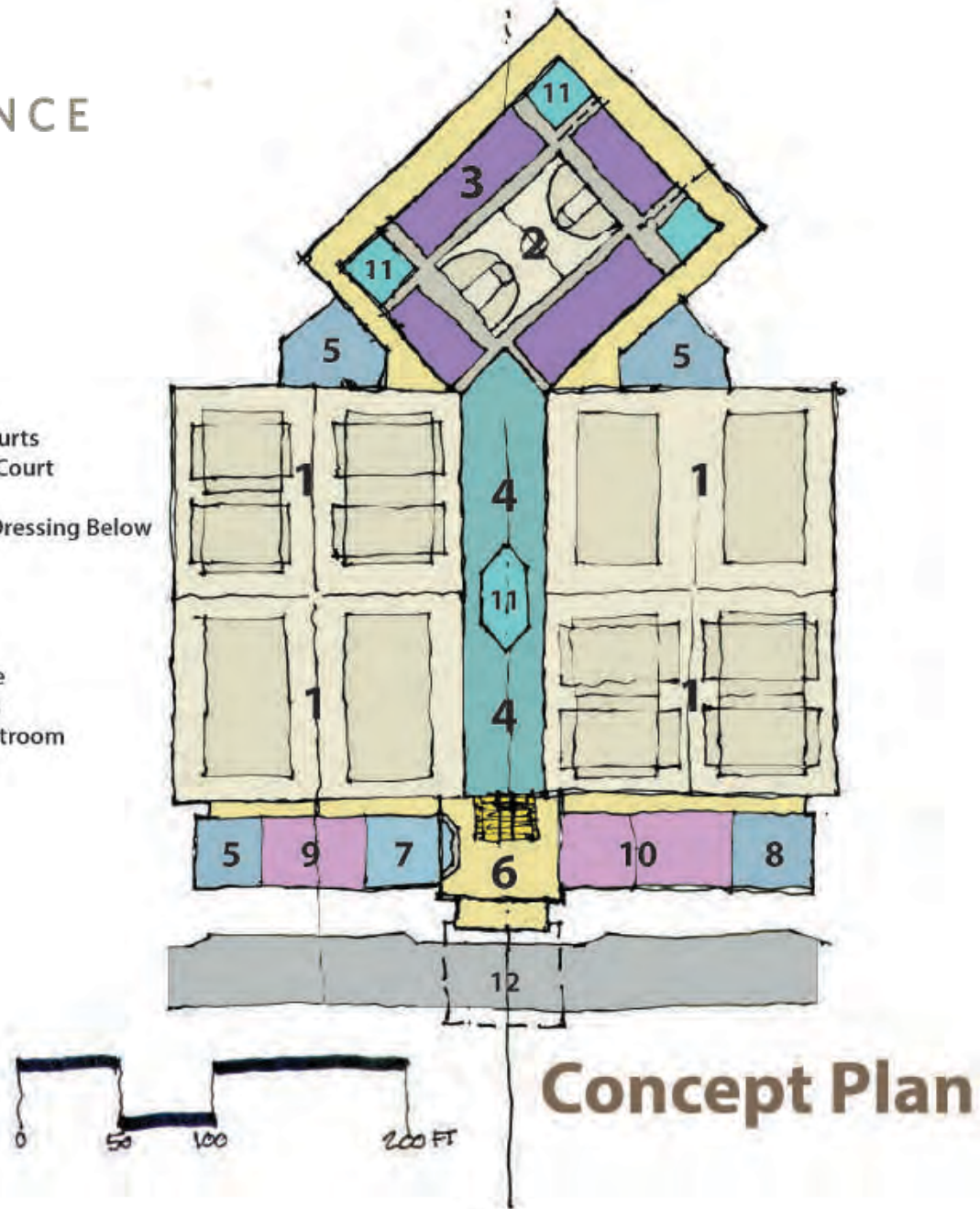


Seminole County Indoor Sports Facility

JAN 2023

**LEGEND:**

- 1 Tournament Courts
- 2 Championship Court
- 3 Seating
- 4 Dining Above/Dressing Below
- 5 Mech./Storage
- 6 Lobby
- 7 Admin/Retail
- 8 Childcare
- 9 Sports Medicine
- 10 Meeting Rooms
- 11 Concession/Restroom
- 12 Drop Off Drive



## Concept Plan

### Cost Estimates - Seminole County Indoor Sports Facility

Building	Construction Cost	Soft Cost	Project Cost
Upper Level	\$3,200,000	\$800,000	\$4,000,000
Main Level	\$44,600,000	\$11,200,000	\$55,800,000
<b>Total Building</b>	<b>\$47,800,000</b>	<b>\$12,000,000</b>	<b>\$59,700,000</b>
Sitework	Construction Cost	Soft Cost	Project Cost
Parking	\$1,400,000	\$400,000	\$1,800,000
Landscaping	\$900,000	\$300,000	\$1,100,000
Other Sitework	\$300,000	\$100,000	\$400,000
<b>Total Sitework</b>	<b>\$2,500,000</b>	<b>\$300,000</b>	<b>\$1,400,000</b>
<b>Total Building &amp; Site</b>	<b>\$50,300,000</b>	<b>\$12,300,000</b>	<b>\$61,100,000</b>

Source: Convergence Design

Soft Costs	
Fees, Testing	9%
Fixtures, Furnishings	6%
Contingency	10%
<b>Total Soft Costs</b>	<b>25%</b>



# 02

## Project Profile

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# Situational Overview

Seminole County (County or Client) engaged the Hunden Strategic Partners Team (HSP or Team) to conduct a financial feasibility and pro forma study for a new indoor sports complex (Project) in Seminole County, Florida. The Hunden Strategic Partners Team, which includes architects at Convergence Design, aims to determine the market demand for sports and events, programming options, similar case studies, construction and operational cost projections, and funding options as they relate to the proposed Project.

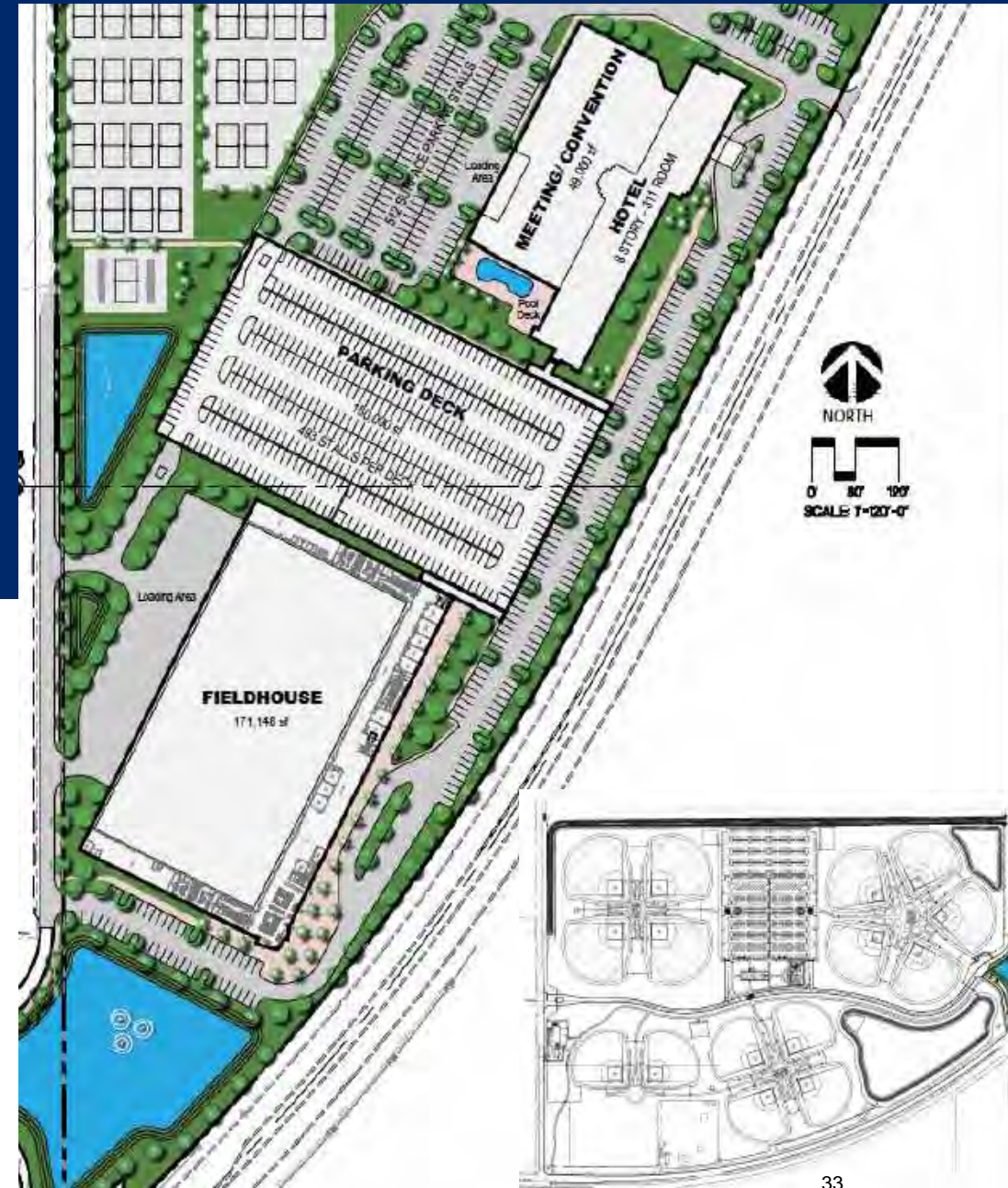
The following chapter analyzes the proposed Complex, including the nearby Boombah Sports Complex that opened in May of 2016.



# Proposed Elements

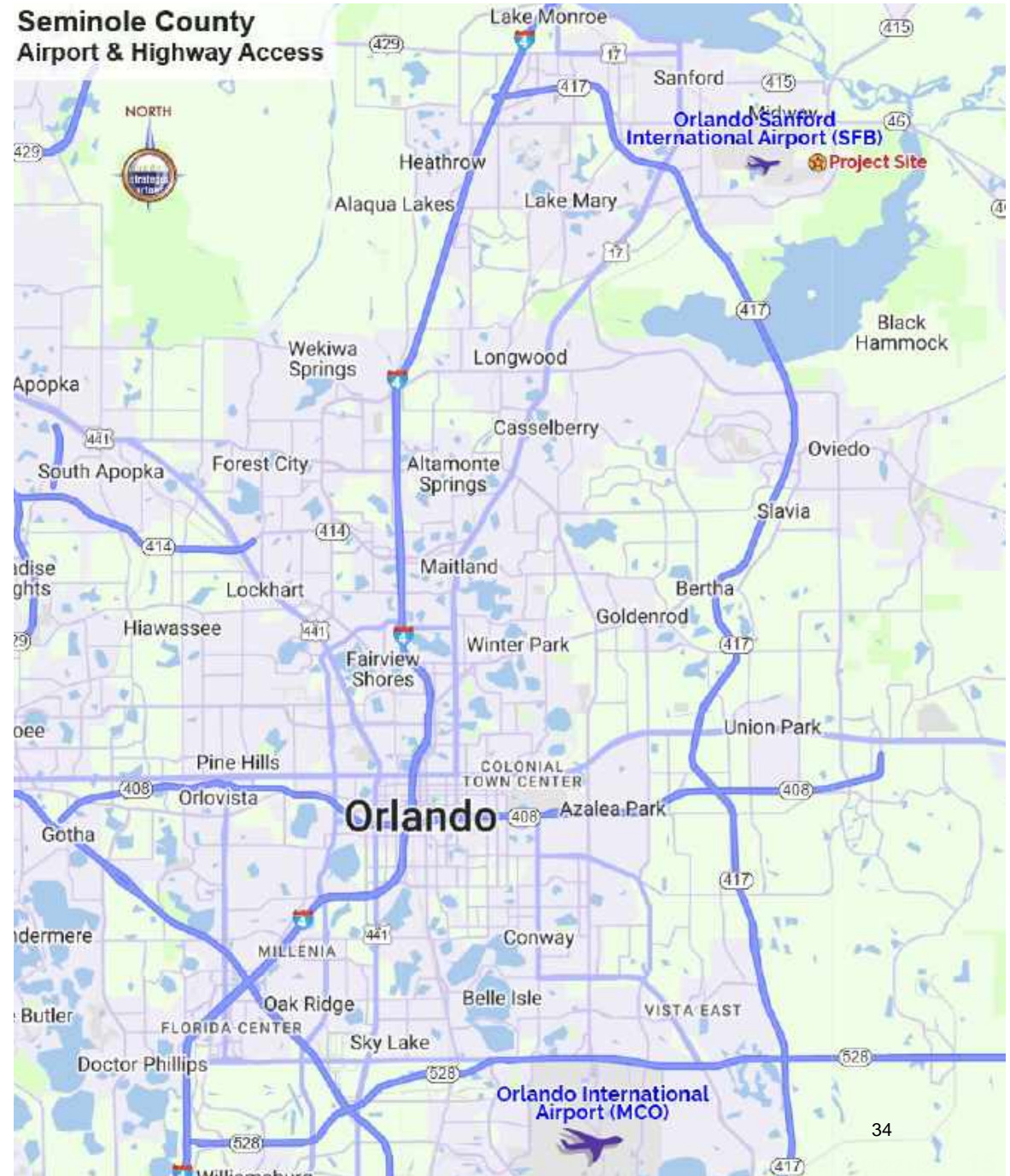
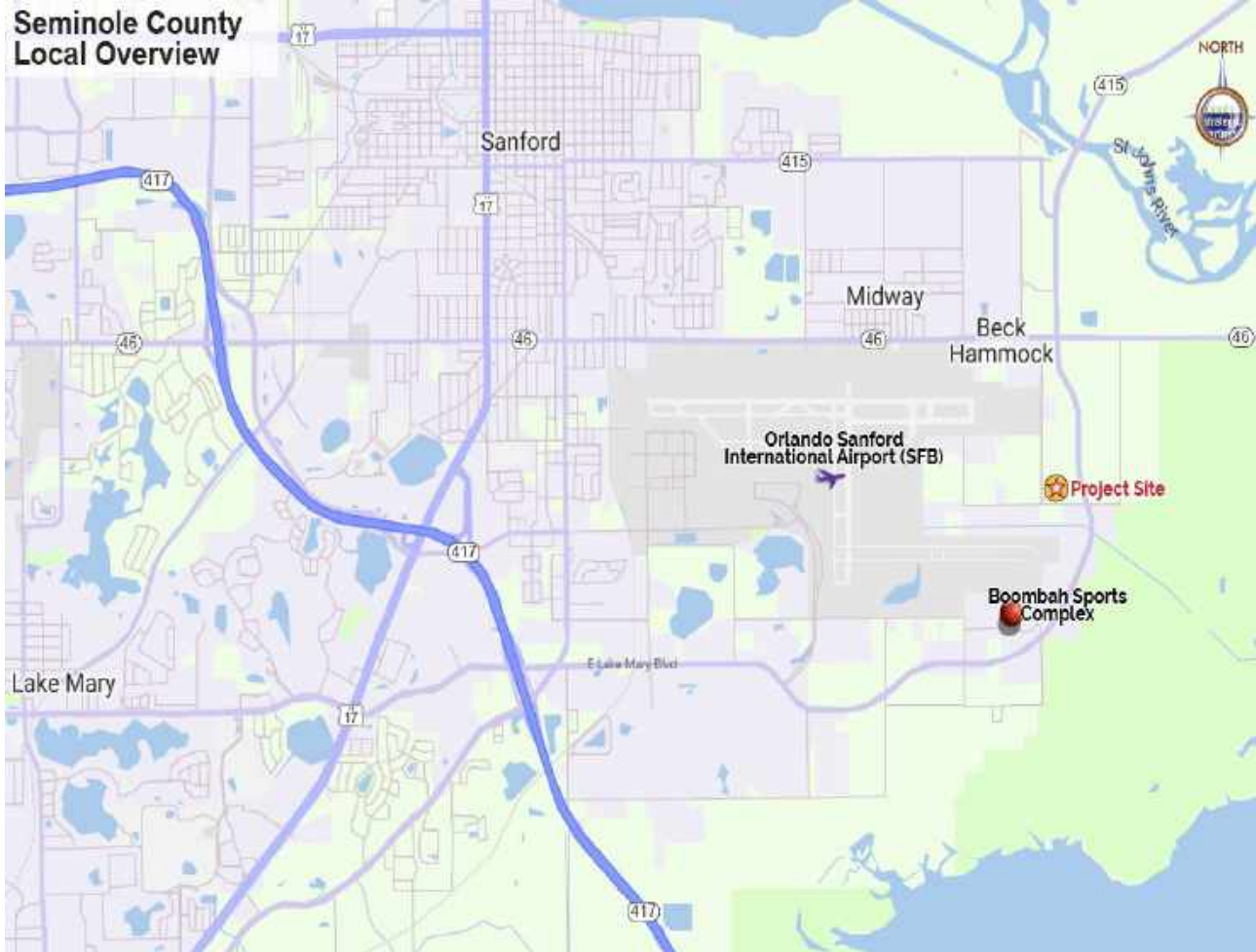
Seminole County conceptualized a Project of approximately 180,000 square feet for a new multi-purpose sports complex in Central Florida. The Project proposes to include the following elements and amenities:

- 12 – 15 full-sized basketball courts,
- Full-sized synthetic soccer field,
- Temporary stage for events,
- Mezzanine/perimeter track elevated above volume floor,
- A full-service concession space with indoor/outdoor eating area,
- 8 – 9 flexible meeting room spaces,
- 5,000 – 6,000 capacity retractable seating,
- Offices, first aid station, locker rooms, maintenance/storage, restrooms, parking and other amenities deemed appropriate.





# Local Overview



# Regional Overview

Seminole County is located in Central Florida and is directly accessible by I-4, SR-417 and SR-429. It is approximately a 30-minute drive to downtown Orlando and 45 minutes from the biggest theme parks in the world.

Seminole County is centrally located within Florida and serves as a midpoint between Miami, Tampa and Jacksonville. The Project's location provides strong potential to become a regional hub for youth sports activity.





# Proposed Site

Seminole County Site Overview





# Boombah Sports Complex

**Location:** Sanford, FL

**Owner/Operator:** Seminole County, Orlando North Sports

**Sports Features:**

- 15 baseball/softball multi-purpose fields
  - 9 synthetic and 6 natural turf fields

**Notes:**

Located on 102 acres, the \$27 million tournament sports complex opened in May 2016 and has hosted significant tournaments and events ever since. The complex partners with Perfect Game USA to operate tournaments year-round. The 15 fields are located in four different hubs with concessions and public restrooms at each. There is a centrally located administration building with offices and a meeting room with the capacity to fit 120 people. The Complex also features a large central pavilion, playground, walking paths, designated areas to accommodate food truck services, central picnic area, batting cages, bullpens and spectator bleachers with shade cover at each field. The facility's fields also have the ability to accommodate soccer, football and lacrosse.



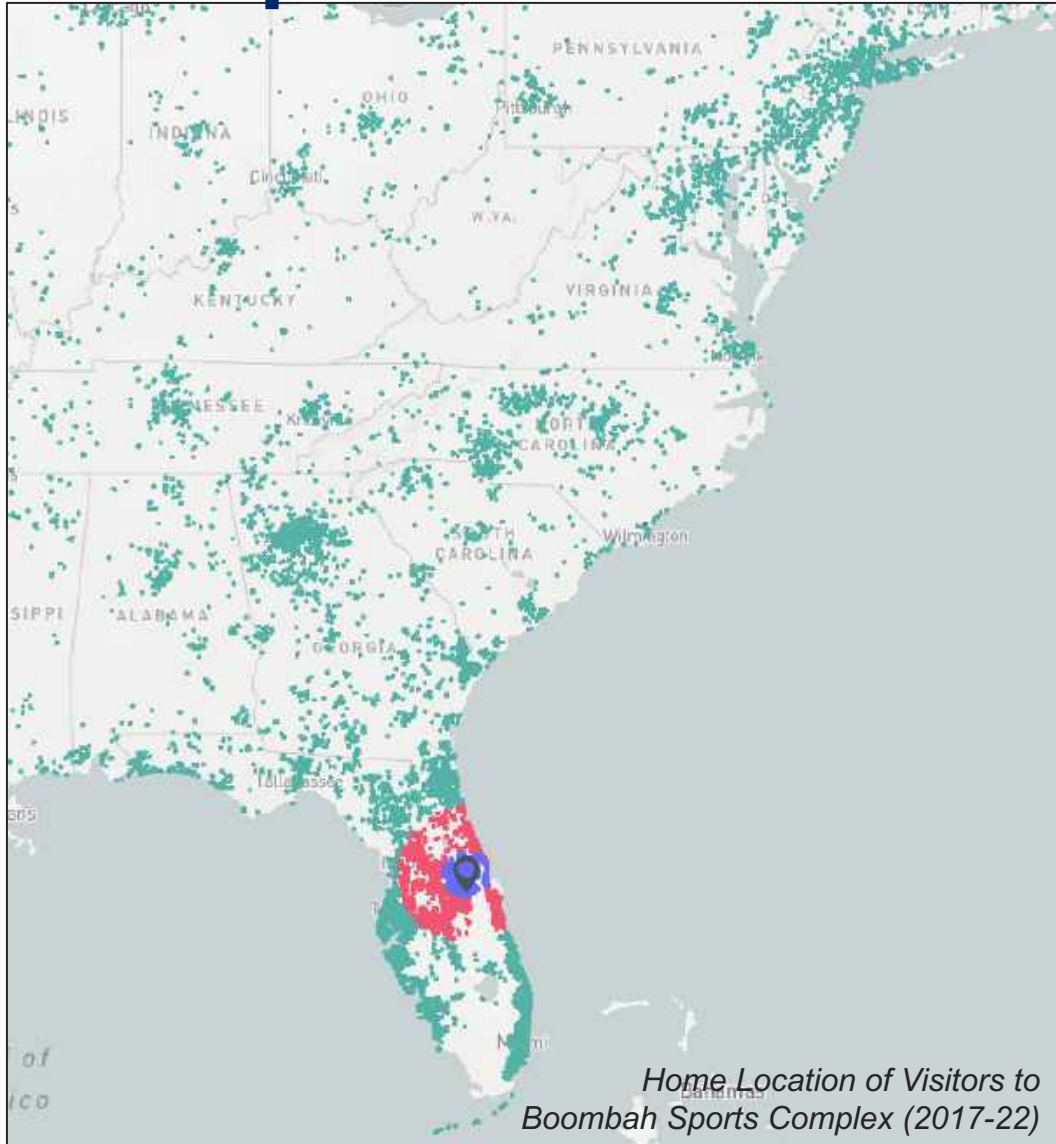
# Boombah Sports Complex

Fiscal Year	Number of Events	Teams	Visitors	Tracked Room Nights	Estimated Economic Impact	Percent Change (Events)
2015/16	27	1,523	74,458	6,437	\$13,174,148	--
2016/17	55	3,493	132,021	11,570	\$18,900,000	103.7%
2017/18	64	3,086	146,019	17,093	\$21,820,116	16.4%
2018/19	57	3,149	147,854	23,670	\$25,349,765	-10.9%
2019/20	43	1,811	82,658	17,329	\$16,046,471	-24.6%
2020/21	45	3,304	125,485	27,160	\$31,145,048	4.7%
<b>Total</b>	<b>291</b>	<b>16,366</b>	<b>708,495</b>	<b>103,259</b>	<b>\$126,435,548</b>	

Source: Seminole County Economic Development and Tourism

Since opening in 2016, Boombah Sports Complex has seen a significant number of events that draw visitation from all over the country with more than 103,000 total room nights translating to more than \$126 billion in total estimated economic impact for Seminole County. Prior to COVID-19 pandemic, Boombah was hosting upwards of 55 events per year which proves that the facility is utilized year-round with simultaneous events occurring on some occasions. The facility has started to recover from the pandemic with 45 events in 2020/21 and events that drive more room nights and therefore more economic impact for the area.

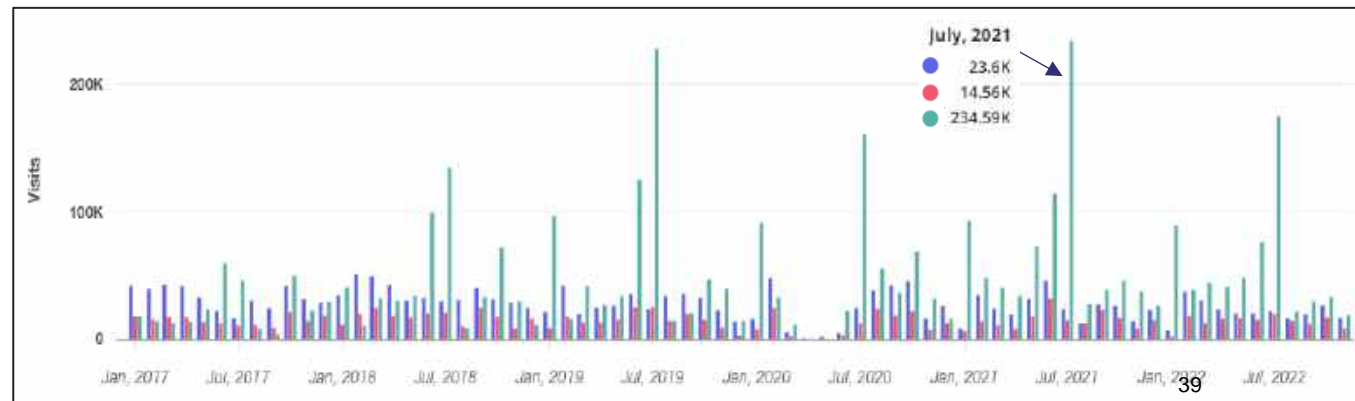
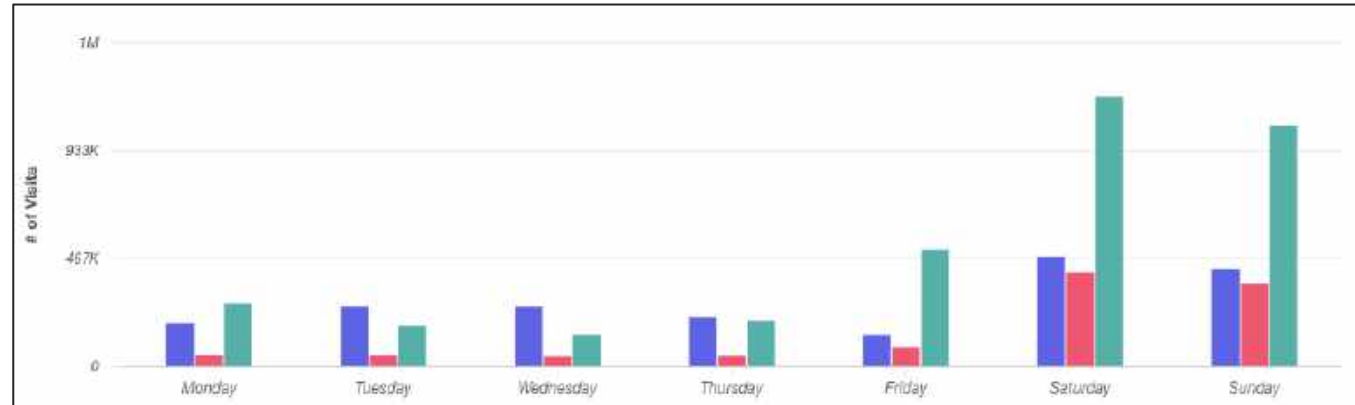
# Boombah Sports Complex Visitation



Boombah Sports Complex - Total Visitation  
January 1st, 2017 - November 30th, 2022

Visitor Origins by Distance from Site (Colors correspond to charts & maps)	Total Visits		Total Unique Customers		Avg. Visits per Customer
	Est. Number of Visits	Percent of Total Visits	Est. Number of Customers	Percent of Total Customers	
Locals - Within 25 miles	1,900,000	29.2%	63,100	16.0%	30.11
Regional Distance - Over 25 miles & Less Than 75 miles	1,100,000	16.9%	58,900	14.9%	18.68
Long Distance only - Over 75+ miles	3,500,000	53.8%	272,000	69.0%	12.87
<b>Total Visits</b>	<b>6,500,000</b>	<b>100.0%</b>	<b>394,000</b>	<b>100.0%</b>	<b>16.50</b>

Source: Placer.ai



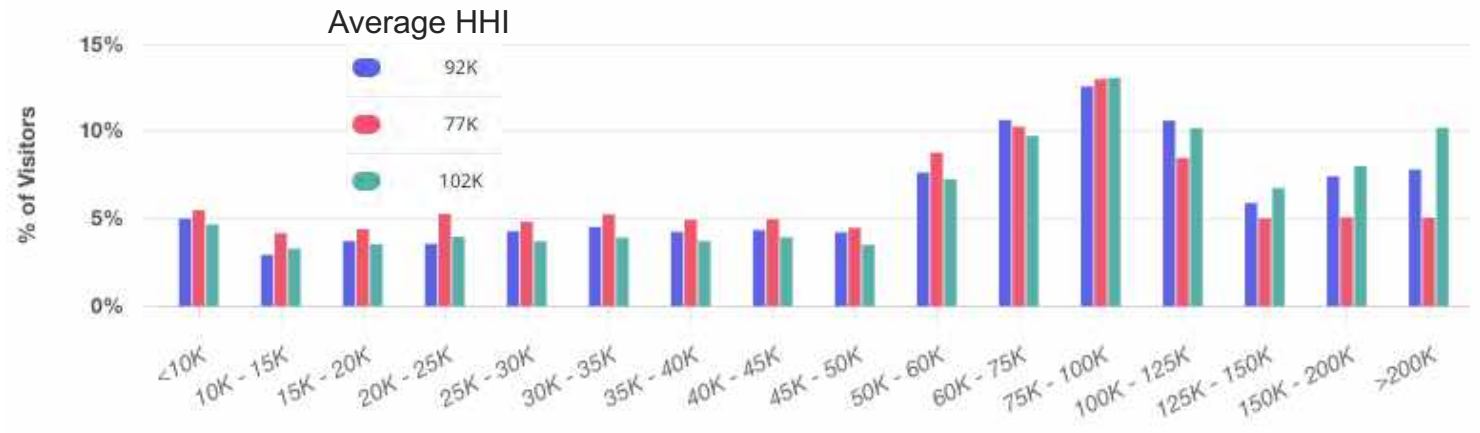
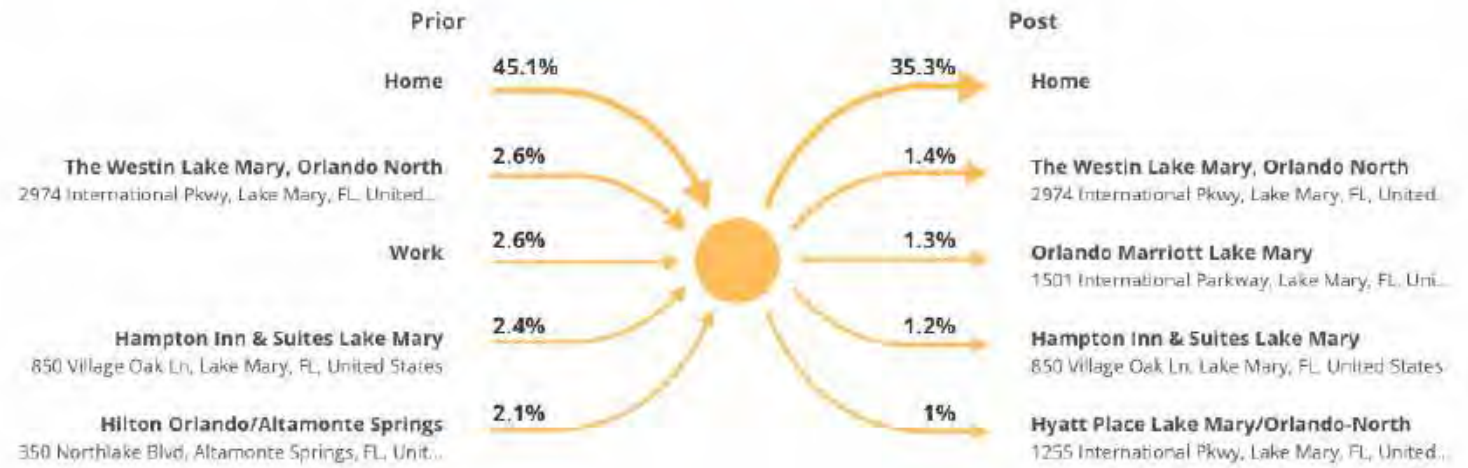


# Boombah Sports Complex Visitation

The top graphic shows prior and post visitation from visitors to Boombah Sports Complex. Although the majority of visitation comes from long distance (over 75 miles), 45 percent of visitors come from home to Boombah and 35 percent return home thereafter. This could be due to limited hotel supply in the local area as well as the caliber of tournaments currently held at the sports complex. In order to maximize sports tourism in Seminole County, the Project must develop additional facilities to attract visitors from the region that would require more overnight stays and generate hotel room nights.

For the visitors that are staying in hotels, people often return to their hotels after leaving. Demographics show that these visitors have high average incomes with disposable income to spend within Seminole County. Supporting commercial assets around the Complex provides dining and entertainment options that would improve the economic impact of sports tourism within the area that is not currently captured.

The majority of visitors visit Boombah on the weekends during the day due to the outdoor accommodations currently offered. In additional sports facility that focused on indoor sports has the ability to support the current operations at Boombah and induce new sports tourism to the area.





# 03

## Economic, Demographic and Tourism Analysis

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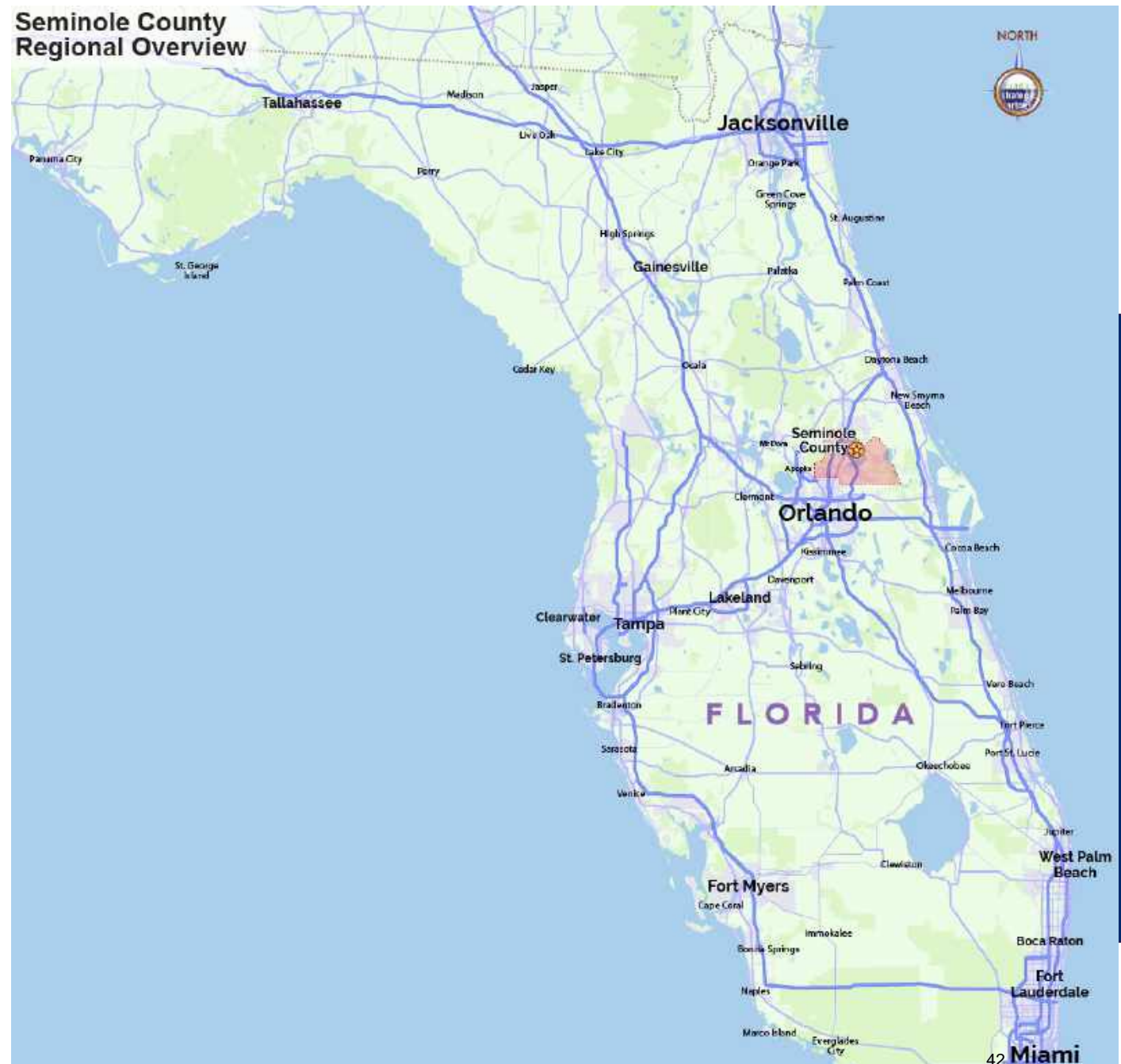




# Regional Overview

Seminole County is located in Central Florida just 30 minutes outside of downtown Orlando. The greater Orlando area has experienced a significant amount of growth in the past decade and Seminole County's central location has made it one of Florida's fastest-growing counties. Seminole County is expected to experience continuous economic and population growth as the Orlando urban core continues to approach build-out.

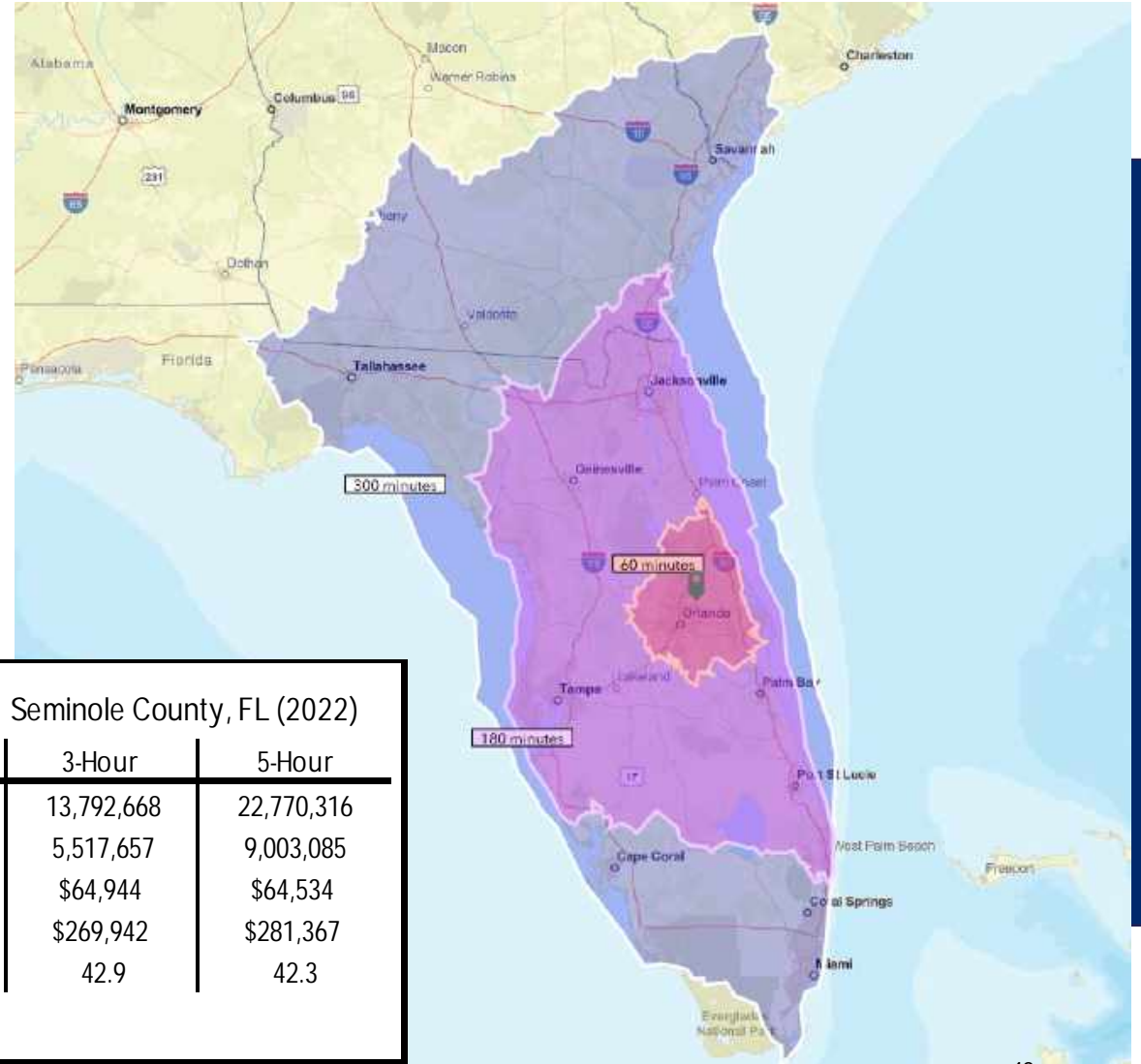
The area is served by major highways such as I-4, SR-417 and SR-429. Seminole County is served by two commercial airports, Orlando Sanford International Airport (SFB) within Seminole County and Orlando International Airport (MCO) 30 miles away. Major markets within the State of Florida include Orlando, Tampa, Fort Myers, Fort Lauderdale, Miami and Jacksonville.





# Drive Time Market Analysis

Economic and demographic attributes are evaluated within a one-, three- and five-hour drive time to gauge the capturable market for a youth sports facility. Seminole County is located in central Florida, which gives the Project a strong geographical potential to attract visitation throughout the state from major markets such as Miami, Tampa, Jacksonville and Tallahassee. Within a one-hour drive time, the population reaches more than 3.2 million. When expanded to a three-hour drive time, the population reaches nearly 13.8 million, which provides significant potential for a regional tournament facility. Within a five-hour drive time, the population reaches 22.7 million and extends to markets such as Savannah, Georgia.



Estimated Drive-Time Statistics from Seminole County, FL (2022)

	1-Hour	3-Hour	5-Hour
Population	3,258,529	13,792,668	22,770,316
Households	1,234,766	5,517,657	9,003,085
Median Household Income	\$66,170	\$64,944	\$64,534
Median Home Value	\$284,343	\$269,942	\$281,367
Median Age	38.9	42.9	42.3

Source: ESRI

# Accessibility

The Orlando Sanford International Airport (SFB) is adjacent to the Project. The airport has non-stop passenger flights scheduled to 80 destinations in the U.S. and Canada and is a base for Allegiant Air. Prior to the COVID-19 pandemic, the SFB airport serviced more than 3.2 million passengers in 2019 and is beginning to recover to pre-pandemic levels.

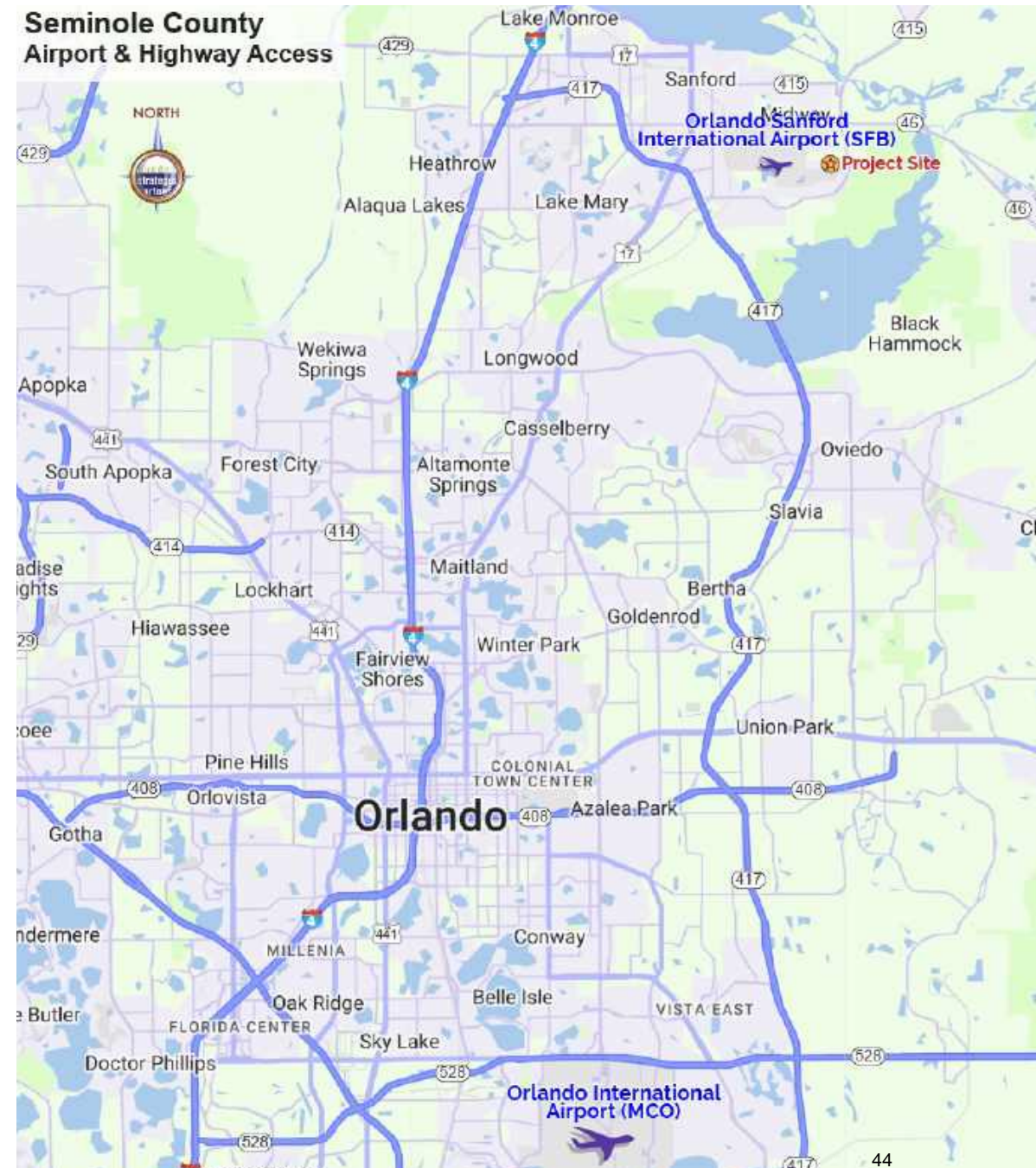
The Orlando International Airports (MCO) is approximately 36 miles from the Project. The Orlando Airport has non-stop passenger flights scheduled to 144 destination in 25 countries, with about 93 domestic flights from Orlando. MCO is one of the busiest airports in the country, servicing more than 41 million passengers annually on average.

Orlando International Airport (MCO)		
Year	Total Passengers	Percent Change
2017	44,611,265	-
2018	47,696,627	6.9%
2019	50,613,072	6.1%
2020	21,248,838	-58.0%
2021	41,900,000	97.2%
Average	41,213,960	

Source: Orlando Sanford International Airport, TSA

Orlando Sanford International Airport (SFB)		
Year	Total Passengers	Percent Change
2017	2,922,446	--
2018	3,094,487	5.9%
2019	3,291,112	6.4%
2020	1,545,041	-53.1%
2021	2,396,108	55.1%
Average	2,649,839	

Source: Orlando Sanford International Airport, TSA



# Key Demographic Statistics

Seminole County's population increased more than 11 percent from 2010 to 2020 and is projected to continue to do so through 2027. Between 2010 and 2020, the Orlando MSA saw substantial growth at more than 25 percent. Florida is growing exponentially especially since the COVID-19 pandemic. As population continues to increase, additional community assets in the area will need to be introduced to support demand for youth sports participation.

Seminole County's median household income is the highest compared to the MSA, state and national averages. High median household incomes suggests that within the county, residents are more likely to have disposable income to spend on youth sports and recreational activities.

	2010	2020	2022	2027 Projected	Percent Change 2010 - 2020
United States	308,745,538	331,449,281	335,707,897	339,902,796	7.4%
Florida	18,801,310	21,538,187	22,114,754	22,794,570	14.6%
Orlando-Kissimmee-Sanford, FL MSA	2,134,411	2,673,376	2,799,598	2,940,654	25.3%
Seminole County	422,718	470,856	480,695	490,093	11.4%

Source: U.S. Census Bureau

Category	United States	Florida	Orlando MSA	Seminole County
Homeownership rate, 2021	64.6%	66.5%	63.0%	66.0%
Median value of owner-occupied housing units, 2017-21	\$244,900	\$248,700	\$303,300	\$280,100
Persons per household, 2017-21	2.60	2.57	2.70	2.56
Median household income, 2017-21	\$69,021	\$61,777	\$64,936	\$73,002
Persons below poverty level, percent	11.6%	13.1%	12.9%	9.4%
Total employment, 2020	134,163,349	9,084,079	--	188,461
Total employment, percent change, 2019-2020	0.9%	2.5%	--	1.7%

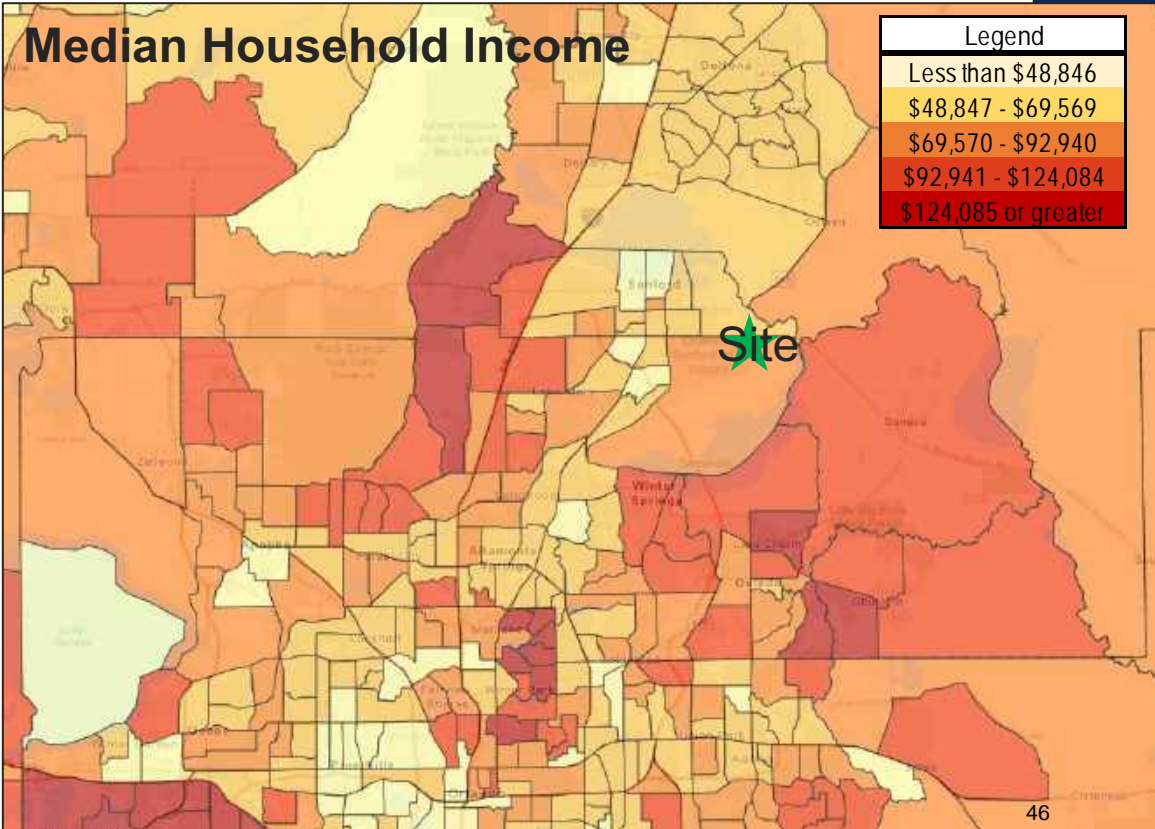
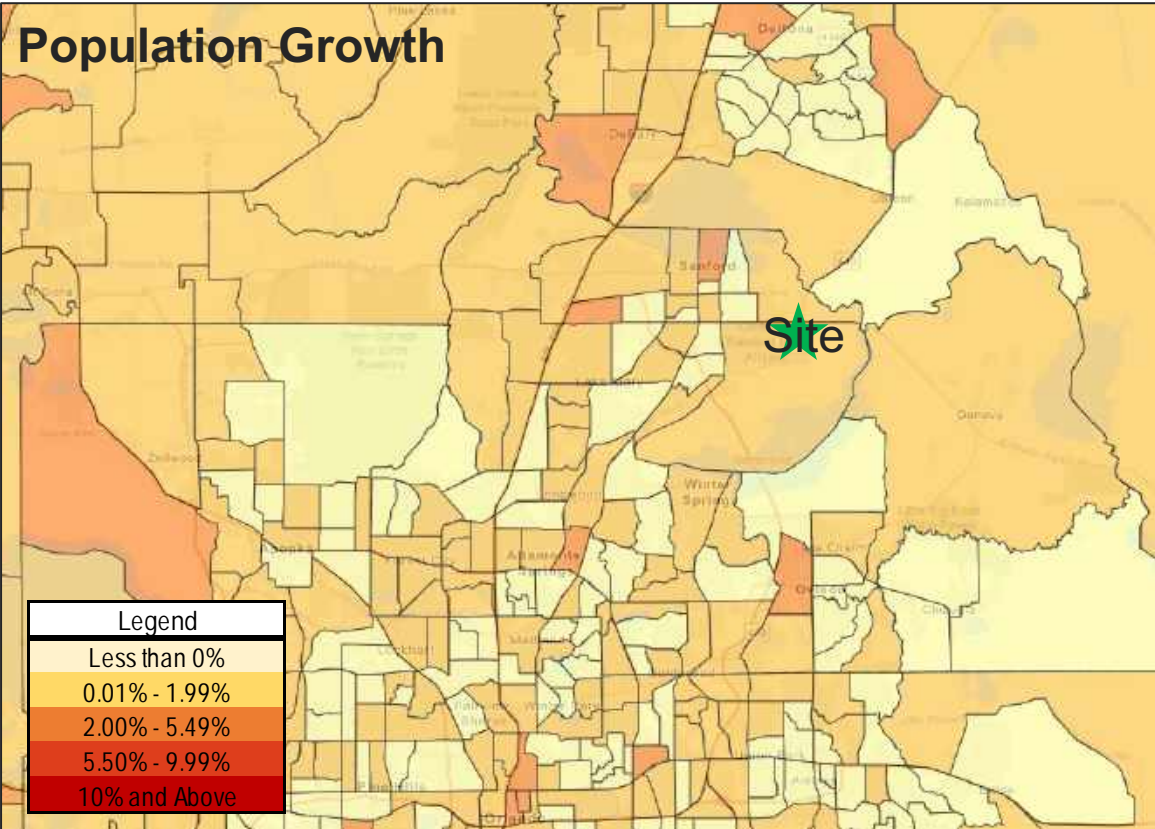
Source: U.S. Census Bureau





# Market Area & Growth Trends

The maps below illustrate the projected annual population growth rate from 2022 to 2027 and the 2022 median household income in the Seminole County area. Seminole County's growth is increasing at a steady rate, however, there are pockets of minimal growth near the Project site. Seminole County and other areas surrounding the Orlando metropolitan area have high median household incomes, indicating the ability to support high fees associated with competitive youth sports programs.



# Education

The educational attainment data among the population in Seminole County shows that the area is above the national average for higher-education. There are 19 colleges and universities in the Seminole County area. Within 50 miles of the Project, there is a total of nearly 200,000 students in the area.

Youth sports facilities are often supported by college students through refereeing, affordable coaching roles and volunteering efforts. With a strong collegiate presence in the surrounding area, Seminole County has a strong base of potential employees for the Project.

Educational Attainment - 2021			
Population Age 25+	United States	Florida	Seminole County
Did Not Complete High School	10.6%	10.2%	7.0%
Completed High School	26.3%	27.7%	21.4%
Some College	19.3%	18.9%	17.3%
Completed Associate Degree	8.8%	10.0%	10.9%
Completed Bachelor Degree	21.2%	20.6%	28.4%
Completed Graduate Degree	13.8%	12.6%	15.0%

Source: U.S. Census Bureau

Seminole County Colleges & Universities (Within 50 miles)				
Institution	Location	Distance from 32773	Highest Degree Offered	Enrollment
Seminole State College of Florida	Sanford	0.0 miles	Bachelor	15,315
City College-Altamonte Springs	Altamonte Springs	10.7 miles	Associate	218
Herzing University-Orlando	Winter Park	10.8 miles	Master	732
University of Central Florida	Orlando	11.9 miles	Doctorate	70,310
Rollins College	Winter Park	12.5 miles	Doctorate	3,057
AdventHealth University	Orlando	15.1 miles	Doctorate	1,667
The Continents States University	Orlando	16.6 miles	Master	0
Stetson University	DeLand	17.1 miles	Doctorate	4,257
Polytechnic University of Puerto Rico-Orlando	Orlando	17.2 miles	Master	149
Ana G. Mendez University	Orlando	18.2 miles	Doctorate	5,150
Valencia College	Orlando	21.4 miles	Bachelor	43,599
Lake-Sumter State College	Leesburg	31.1 miles	Associate	4,342
Bethune-Cookman University	Daytona Beach	33.2 miles	Master	2,624
Daytona State College	Daytona Beach	33.2 miles	Associate	11,613
Embry-Riddle Aeronautical University-Daytona Beach	Daytona Beach	33.2 miles	Doctorate	9,593
Embry-Riddle Aeronautical University-Worldwide	Daytona Beach	33.2 miles	Doctorate	12,720
Johnson University Florida	Kissimmee	33.8 miles	Bachelor	149
Beacon College	Leesburg	37.0 miles	Bachelor	460
Eastern Florida State College	Cocoa	42.4 miles	Bachelor	12,677
Total				198,632

Source: National Center for Education Statistics

# Tapestry Segmentation

HSP performed a tapestry segmentation analysis which classifies neighborhoods using 67 unique segments based not only on demographics but also on socioeconomic characteristics.



- The top five segments in Seminole County are Home Improvement, Workday Drive, Bright Young Professionals, Metro Fusion and Savvy Suburbanites.
- Understanding the segmentation profile of the area helps to better understand how this project can impact various types of residents.

Rank	Segment	Median Age	Median Household Income	Percentage
1	Home Improvement	37.7	\$72,100	13.2%
2	Workday Drive	37.0	\$90,500	9.4%
3	Bright Young Professionals	33.0	\$54,000	8.8%
4	Metro Fusion	29.3	\$35,700	7.4%
5	Savvy Suburbanites	45.1	\$108,700	5.9%
	Average / Total	36.4	\$72,200	44.7%

Source: ESRI



# Tapestry Segmentations

The Home Improvement segment is the largest, making up more than 13 percent of the Seminole County market.

- The average household size of this segment is 2.88, indicating families with children. A high population of this segment is important for potential youth sports developments, providing a strong potential local user base.
- This segment is comprised of households where more than half consists of married-couple families and another 12 percent include single-parent families.
- Median household income is approximately \$72,000 with spending heavily on eating out, at both fast-food and family restaurants.



LifeMode Group: Family Landscapes

## Home Improvement

**Households:** 2,114,500

**Average Household Size:** 2.88

**Median Age:** 37.7

**Median Household Income:** \$72,100

4B

### WHO ARE WE?

Married-couple families occupy well over half of these suburban households. Most Home Improvement residences are single-family homes that are owner occupied, with only one-fifth of the households occupied by renters. Education and diversity levels are similar to the US as a whole. These families spend a lot of time on the go and therefore tend to eat out regularly. When at home, weekends are consumed with home improvement and remodeling projects.

### OUR NEIGHBORHOOD

- These are low-density suburban neighborhoods.
- Eight of every 10 homes are traditional single-family dwellings, owner occupied.
- Majority of the homes were built between 1970 and 2000.
- More than half of the households consist of married-couple families; another 12% include single-parent families.

### SOCIOECONOMIC TRAITS

- Higher participation in the labor force; most households have 2+ workers.
- Cautious consumers that do their research before buying, they protect their investments.
- Typically spend 4-7 hours per week commuting, and, therefore, spend significant amounts on car maintenance (performed at a department store or auto repair chain store).
- They are paying off student loans and home mortgages.
- They spend heavily on eating out, at both fast-food and family restaurants.
- They like to work from home, when possible.



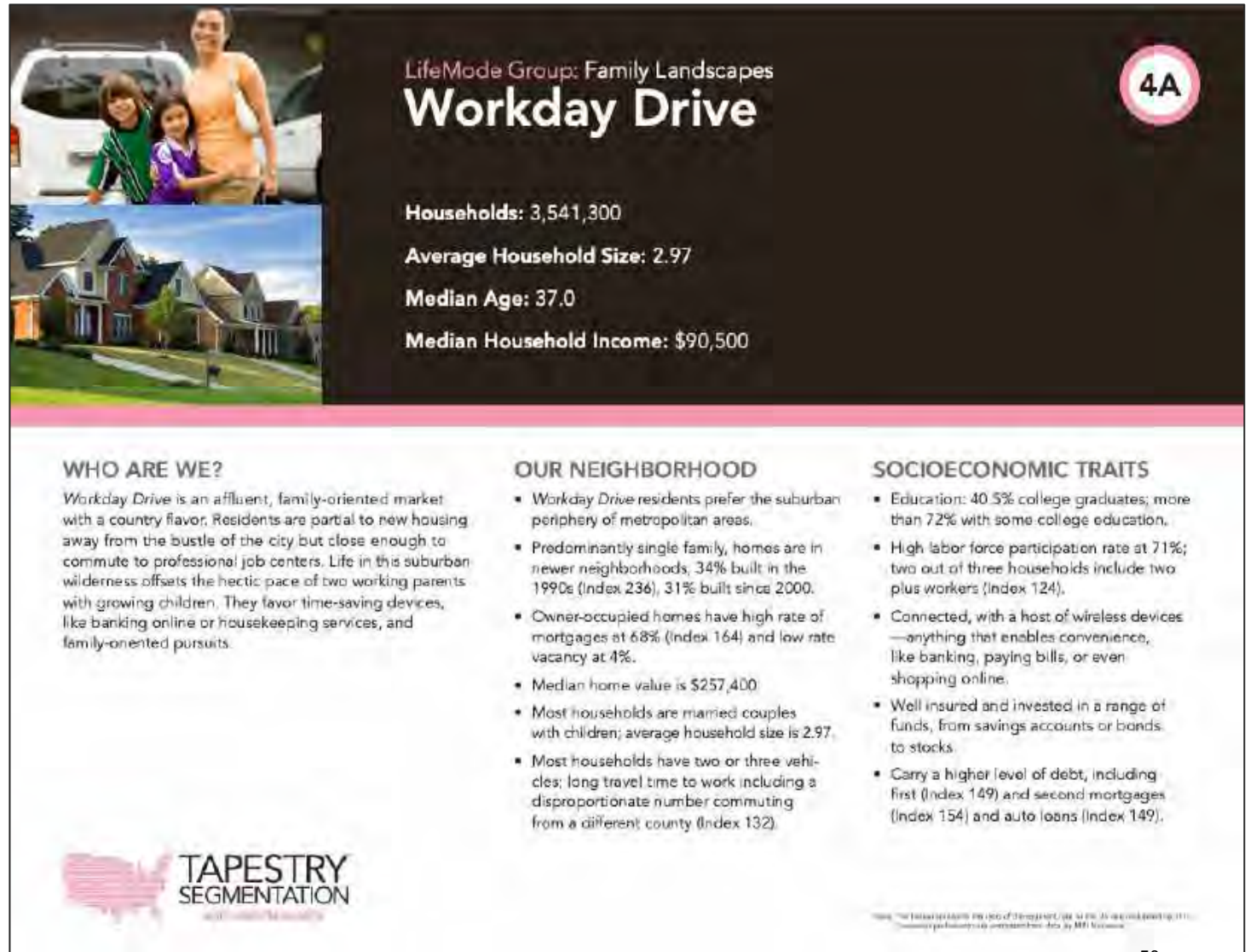
TAPESTRY SEGMENTATION  
www.huden.com/tapestry

Note: The above information is for informational purposes only. It is not intended to be used as a basis for investment decisions. © 2022 HSP. All rights reserved.

# Tapestry Segmentations

The Workday Drive segment makes up nearly 9.5 percent of the Seminole County market.

- This segment is an affluent, family-oriented market with a median household income of more than \$90,000.
- The average household size is about 2.97, which indicates families with children.
- Outdoor activities and sports are characteristics of life in the suburban periphery. This segment not only attends sporting events but will regularly participate in sporting activities as well as daily activities such as bicycling, jogging, golfing and boating.



**LifeMode Group: Family Landscapes**  
**Workday Drive**

**Households:** 3,541,300  
**Average Household Size:** 2.97  
**Median Age:** 37.0  
**Median Household Income:** \$90,500

**4A**

**WHO ARE WE?**  
*Workday Drive* is an affluent, family-oriented market with a country flavor. Residents are partial to new housing away from the bustle of the city but close enough to commute to professional job centers. Life in this suburban wilderness offsets the hectic pace of two working parents with growing children. They favor time-saving devices, like banking online or housekeeping services, and family-oriented pursuits.

**OUR NEIGHBORHOOD**

- *Workday Drive* residents prefer the suburban periphery of metropolitan areas.
- Predominantly single family, homes are in newer neighborhoods; 34% built in the 1990s (Index 236), 31% built since 2000.
- Owner-occupied homes have high rate of mortgages at 68% (Index 164) and low rate vacancy at 4%.
- Median home value is \$257,400
- Most households are married couples with children; average household size is 2.97.
- Most households have two or three vehicles; long travel time to work including a disproportionate number commuting from a different county (Index 132).

**SOCIOECONOMIC TRAITS**

- Education: 40.5% college graduates; more than 72% with some college education.
- High labor force participation rate at 71%; two out of three households include two plus workers (Index 124).
- Connected, with a host of wireless devices—anything that enables convenience, like banking, paying bills, or even shopping online.
- Well insured and invested in a range of funds, from savings accounts or bonds to stocks.
- Carry a higher level of debt, including first (Index 149) and second mortgages (Index 154) and auto loans (Index 149).

**TAPESTRY SEGMENTATION**

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# Tapestry Segmentations

The Bright Young Professionals segment makes up nearly nine percent of the Seminole County market.

- This segment is a large market that is primarily located in urban outskirts of large metropolitan areas.
- Median household income, median home value and average rent are close to the US values. Labor force participation is high with diversity across employment opportunities.
- This segment is typically made up of households that are primarily couples (married or unmarried) with above average concentrations of both single-parent and single-person households.



LifeMode Group: Middle Ground

## Bright Young Professionals

**Households:** 2,750,200

**Average Household Size:** 2.41

**Median Age:** 33.0

**Median Household Income:** \$54,000



**WHO ARE WE?**

*Bright Young Professionals* is a large market, primarily located in urban outskirts of large metropolitan areas. These communities are home to young, educated, working professionals. More than one out of three householders are under the age of 35. Slightly more diverse couples dominate this market, with more renters than homeowners. More than two-fifths of the households live in single-family homes; over a third live in 5+ unit buildings. Labor force participation is high, generally white-collar work, with a mix of food service and part-time jobs (among the college students). Median household income, median home value, and average rent are close to the US values. Residents of this segment are physically active and up on the latest technology.

**OUR NEIGHBORHOOD**

- Approximately 57% of the households rent; 43% own their homes.
- Household type is primarily couples, married (or unmarried), with above-average concentrations of both single-parent (Index 125) and single-person (Index 115) households.
- Multiunit buildings or row housing make up 56% of the housing stock (row housing [Index 178], buildings with 5-19 units [Index 275]); 43% built 1980-99.
- Average rent mirrors the US (Index 100).
- Lower vacancy rate is at 8.2%.

**SOCIOECONOMIC TRAITS**

- Education completed: 35% with some college or an associate's degree, 33% with a bachelor's degree or higher.
- Labor force participation rate of 72% is higher than the US rate.
- These consumers are up on the latest technology.
- They get most of their information from the internet.
- Concern about the environment impacts their purchasing decisions.



TAPESTRY SEGMENTATION  
aeri.com/tapestry





# Tourism & Attractions

# Tourism Overview

Attractions serve as support amenities to sports facilities for their ability to keep teams and families entertained throughout tournaments. A city or county's tourism offerings can increase its tournament capturing abilities. This is demonstrated in nearby places such as Disney's Wide World of Sports as well as Las Vegas which hosts several premier national youth sports tournaments each year. However, suburban markets such as Seminole County that are near family attractions ultimately enhances the appeal for regional and national youth sports trips.

The attraction offerings in Seminole County will likely be visited by teams and families who will be looking for entertainment options in the surrounding area during down times. The greater Orlando market appeal is equally as important given the likelihood of a family's preference to extend a youth sports trip and turn it into a family vacation. The following slides will analyze Seminole County's offerings and the greater Orlando market as a tourist destination.



# Local Tourism Overview

Seminole County Most Visited Attractions - 2021 (Sorted by total unique visitors)

Rank	Name	Attraction Type	2021 Visitors	2021 Visitation	Vists More Than 50 mi	Visits More Than 100 mi	% Visits Over 50 Miles	% Visits Over 100 Miles	Avg. Visits Per Customer
1	Central Florida Zoo & Botanical Gardens	Zoo	305,100	388,200	134,900	116,700	34.75%	30.06%	1.27
2	Boombah Sports Complex	Sports Complex	275,200	1,300,000	190,600	680,900	14.66%	52.38%	4.72
3	The Charles Hosmer Morse Museum of American Art	Museum	90,400	134,200	36,000	31,100	26.83%	23.17%	1.48
4	Boombah Soldiers Creek Park	Park	86,600	383,300	198,900	136,000	51.89%	35.48%	4.43
5	Planet Obstacle	Indoor Recreation	37,700	51,100	6,400	5,300	12.52%	10.37%	1.36
6	Cranes Roost Park	Park	37,400	62,900	8,900	7,500	14.15%	11.92%	1.68
7	Harry P Leu Gardens	Park	21,000	27,900	7,100	5,400	25.45%	19.35%	1.33
8	Winter Park Golf Course	Golf Course	15,300	54,200	6,300	5,000	11.62%	9.23%	3.54
9	Enzian Theater	Theater	7,300	10,800	-	-	-	-	-
10	Gallery on First	Art Gallery	7,000	10,300	-	-	-	-	-

Visitation numbers are estimates based off of geo-fencing data

Source: Placer.ai, Orlando North, Various

Seminole County is home to numerous tourism attractions that range from wildlife preserves and nature parks to shopping and nightlife options. The top attraction in Seminole County is the Central Florida Zoo & Botanical Gardens which had more than 305,000 unique visitors in 2021 with over 30 percent of visitation coming from over 100 miles. Other top attractions in the area include Boombah Sports Complex, The Charles Hosmer Morse Museum of American Art and Boombah Soldiers Creek Park.



# Orlando Tourism

**Orlando is the Theme Park Capital of the World and is the top U.S. destination for meetings and events.**

- Orlando is the Theme Park Capital of the World home to Walt Disney World® Resort, Universal Orlando Resort, SeaWorld® Orlando and LEGOLAND® Florida Resort.
- Orlando ranks as the top destination for meetings and events in the United States according to Simpleview. In 2022, Orlando hosted the largest number of the Top 250 conventions followed by Chicago, San Diego and Las Vegas.
- Orlando ranks second in convention function space with Orange County Convention Center (OCCC) offering 2.5 million square feet.
- Visit Orlando tourism data for 2021 shows nearly 1 million attendees for the OCCC events and 129,292 total number of hotel rooms.



Walt Disney World®



Universal Orlando Resort



SeaWorld®



LEGOLAND®

# Orlando Tourism

Visitor Volume to Orlando, Florida (2017 - 2021)						
Segment	2017	2018	2019	2020	2021	Percent Change (2020 - 2021)
Domestic	65,855,000	68,555,000	69,296,000	33,626,000	57,227,000	70.2%
Leisure	54,980,000	57,265,000	58,119,000	28,722,000	49,684,000	73.0%
Business	10,875,000	11,290,000	11,177,000	4,904,000	7,543,000	53.8%
International	6,153,000	6,488,000	6,498,000	1,651,000	2,075,000	25.7%
Overseas	4,644,000	4,895,000	4,905,000	1,154,000	1,584,000	37.3%
Canada	1,172,000	1,211,000	1,223,000	368,000	168,000	-54.3%
Mexico	337,000	382,000	370,000	129,000	323,000	150.4%
Total	72,008,000	75,043,000	75,794,000	35,277,000	59,302,000	68.1%

Source: Visit Orlando

Visit Orlando reports Metro Orlando area defined as a tri-county region consisting of Orange, Osceola and Seminole Counties. The Orlando tri-county area consists of 2,538 square miles with more than 2 million residents. Tourism is a huge factor in Orlando’s economy and is measured by segment and visitor origin. Historically, leisure travel is significantly higher than business travel among domestic visitors. Prior to the COVID-19 pandemic, the area reached more than 75 million visitors in 2019 with nearly 70 million due to domestic travel and 6.5 million international travelers.



# Implications

- Accessibility is important for a youth sports facility and its ability to draw regional and national tournaments. Seminole County is situated in Central Florida with access to major highways and two commercial airports.
- Seminole County, the greater Orlando MSA and the state of Florida have seen rapid population growth over the past decade. With that population growth, youth sports continue to grow and gain popularity, especially within the indoor sports. Higher median household incomes and larger household sizes in the area suggests higher disposable income for recreational uses and entertainment.
- Situated between the biggest theme parks and popular beaches on the eastern coastline, Seminole County has a lot to offer as a destination. Seminole County has the opportunity to capitalize on Boombah Sports Complex's success by becoming a youth sports tournament destination.





# 04

## Local Sports Facility Supply & Demand Analysis

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# Facility Trends and Standards

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Youth sports facilities have become dynamic assets that need to meet the following criteria to maximize revenues, utilization and efficiency.

## Multi-purpose

Whether it be an indoor or outdoor facility, multi-purpose usage is becoming a necessity at all facilities. It is important for facility developers and cities to listen and understand all potential user groups to capture as much usage out of a potential facility as possible.

It is common to see facilities with easily changeable lines, overlapping fields, side training areas, peripheral dynamic spaces, and other small features that can elevate a facility to the next level.

## Strong Amenities

### On-site

Facilities have continued to up their game with creative on-site amenities for both players and spectators: comfortable viewing areas, higher-end concessions or restaurants, play areas for children, training spaces, skate parks, entertainment spaces, and much more.

### Off-site

A strong mix of off-site amenities including food and beverage, grocery stores, restaurants, hotels and entertainment attractions is critical to the viability of youth sports venues.

## Playing Surfaces

Tournament caliber facilities across the country are continually elevating the standard when it comes to playing surfaces. Whether it be a mixture of artificial turf and grass, fully artificial or the introduction of one championship artificial field, these options increase the tournament pull to a facility while benefiting the local residents.

The same can be said for indoor facilities which must have adequately sized courts, enough space between courts for viewers, and contain surrounding warm up spaces for teams and players.

## Other Sports & Play Areas

Facilities have begun introducing new spaces for non-traditional sports such as Pickleball, Cricket, Cornhole, and many others to increase versatility and cater to resident desires.

These spaces can be multi-purpose spaces and accommodate a variety of uses, however being able to offer these both to tournament visitors and local residents is important.

Some facilities have begun to offer e-sports area, or high-end children's play structures to entertain the brothers and sisters of players.

# Local Sports Facility Analysis

Central Florida has a limited offering of indoor court sports facilities that are also tournament capable. The grey cells in the following table highlight the facilities within the local supply that regularly host tournaments and will be profiled in greater detail in this section. Game Point Event Center and The Big House are the main facilities that consistently host large regional tournaments drawing over 30 percent of their visitation from people who live more than 75 miles away, respectively. The other indoor court sport facilities are small in comparison and attract mainly local visitors. Central Florida’s growing population, previous success with other facilities, growing interest in youth sports, and lack of multi-court space demonstrate the gap in the market and the need for an additional indoor tournament capable facility.

Local Facility Supply								
Facility Name	Location	Distance from Site	Volleyball Courts	Basketball Courts	Indoor Turf Fields	2021 Visitation	% of Total Visits within 25 Miles	% of Total Visits from 75+ Miles
Seminole Sports Academy	Longwood, FL	8.4	2	2	--	42,600	90.85%	--
RDV Sportsplex Athletic Club	Orlando, FL	23.1	4	2	--	1,200,000	76.88%	15.37%
XL Soccer World Lake Nona	Orlando, FL	32.2	--	2	2	72,000	84.86%	7.92%
The Well Activity Center	Apopka, FL	32.8	6	3	--	215,000	83.49%	9.44%
DME Academy	Daytona Beach, FL	33.1	7	7	--	283,400	60.02%	24.35%
Lake Nona Performance Club *	Orlando, FL	34.4	4	2	1	282,400	82.08%	15.76%
Game Point Event Center	Orlando, FL	37.3	12	6	1	526,200	57.09%	30.48%
The Big House	Tavares, FL	40.8	16	9	1	272,600	35.44%	30.74%
ESPN Wide World of Sports Complex	Orlando, FL	46.7	32	20	--	1,900,000	10.23%	84.21%
Totals/Average			87	55	5	2,299,050	67.30%	27.28%

\*Opened in 2021 (Shows Trailing Year Visitation)  
 Source: Hunden Strategic Partners, Various Facilities



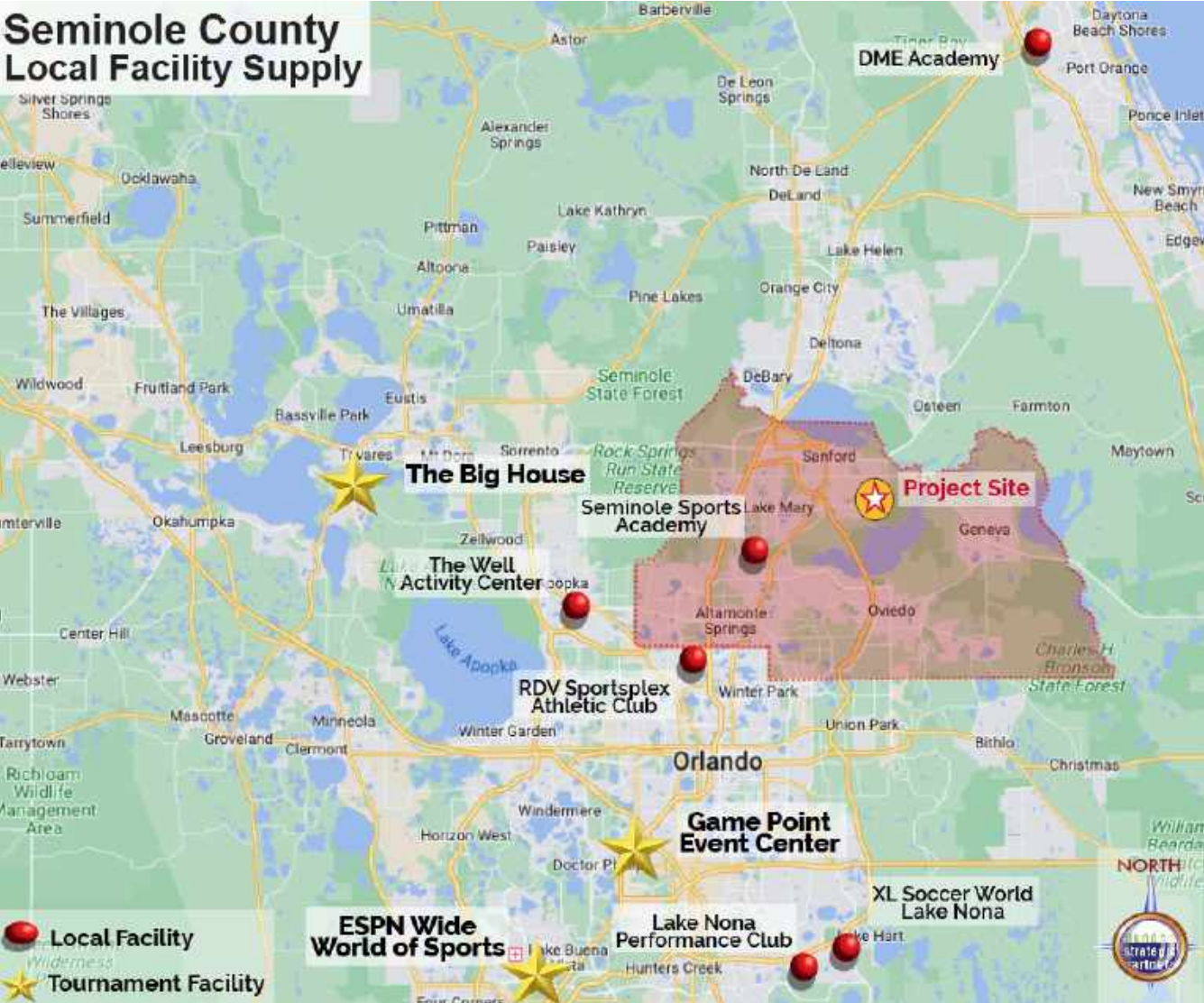
# Local Facility Supply



The local supply for indoor sports facilities is spread out among the greater Orlando market with only two facilities that regularly host tournaments.

Due to the lack of sizeable indoor facilities in Seminole County, there are not currently major tournaments driving sports tourism for the area.

The following sections include an analysis of the most relevant local indoor facilities.





# Indoor Facilities

# Game Point Event Center

**Location:** Orlando, FL

**Owner/Operator:** Game Point Events

## **Sports Features:**

- 6 basketball courts
- 12 volleyball courts
- 1 indoor turf
- 6 outdoor sand volleyball courts

## **Notes:**

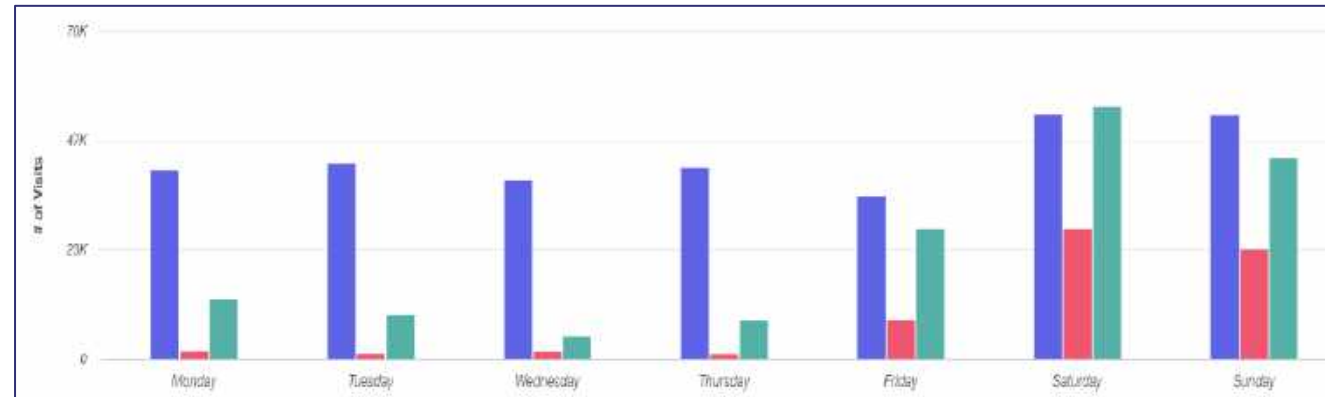
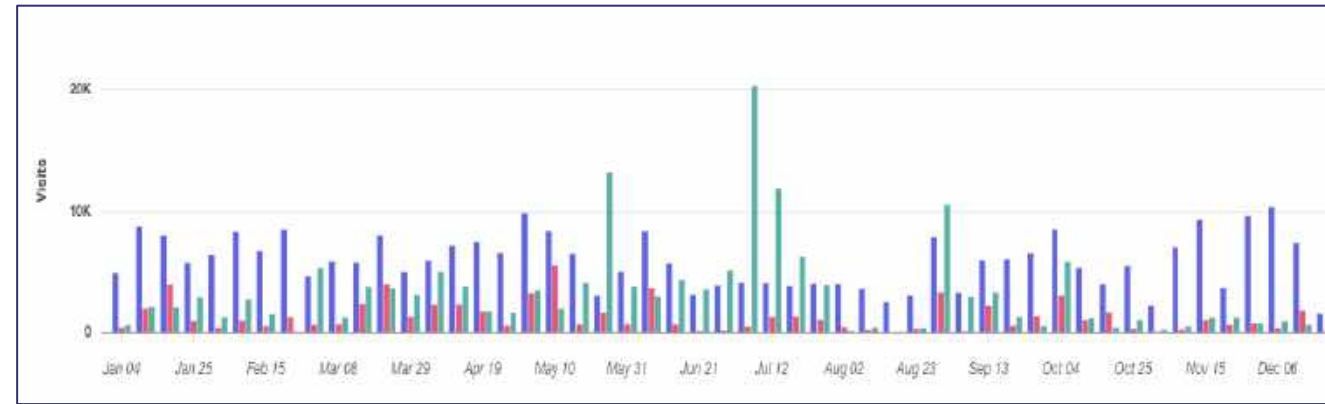
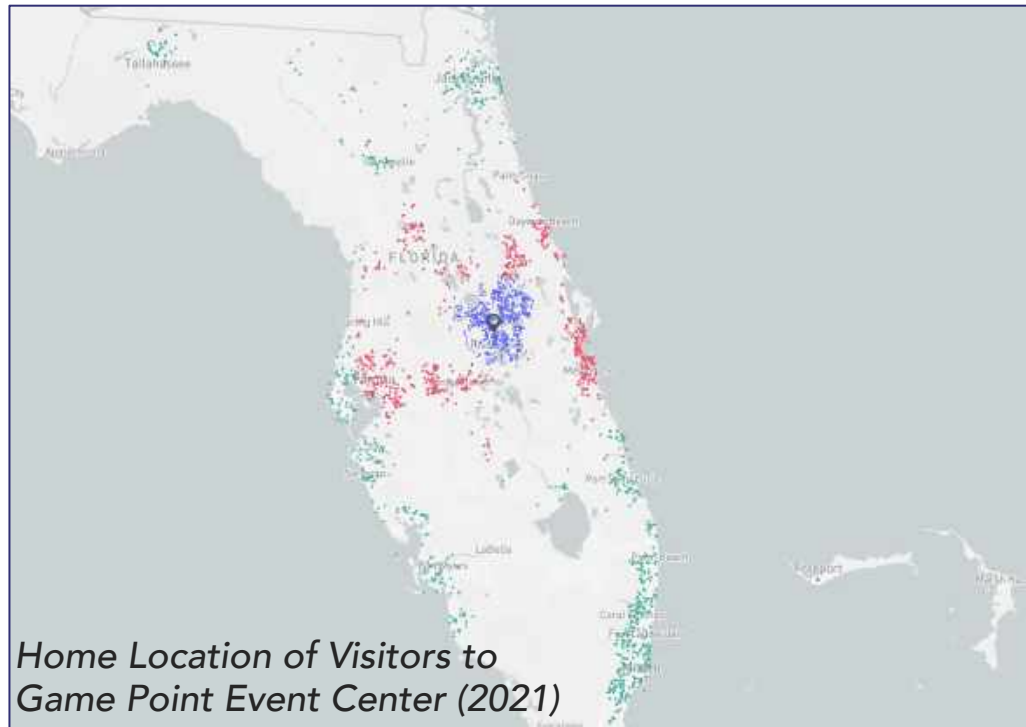
The Game Point Event Center is a 92,000 square foot sports complex that is home to Game Point Volleyball. Game Point Volleyball offers youth club volleyball and hosts other sports such as 352 Elite Boys Volleyball, AAU Basketball, pickleball, and aerial arts. Onsite amenities also include an outdoor sand volleyball courts, performance training facility, meeting rooms & conference space, retail and concessions. Game Point is one of the only facilities in the area that can host tournaments. Due to the lack of local supply, they are operating an average of 50 events per year and have to turn teams away.





# Game Point Event Center Visitation

The Game Point Event Center is one of the main tournament venues in Central Florida and attracts visitors from across the country. The strong weekend visitation and spikes in long distance visitors throughout 2021 demonstrates the strength of the facility's tournament opportunities. The facility regularly works with major organizations such as USA Volleyball and AAU to accommodate volleyball and basketball tournaments that cater to the regional and national competitive level.



Game Point Event Center - Orlando, FL					
January 2021 - December 2021					
Visitor Origins by Distance from Site Colors correspond to charts & maps	Total Visits		Total Unique Customers		Avg. Visits per Customer
	Est. Number of Visits	Percent of Total Visits	Est. Number of Customers	Percent of Total Customers	
Locals - Within 25 miles	300,400	57.1%	33,100	25.5%	9.08
Regional Distance - Over 25 miles & Less Than 75 miles	65,600	12.5%	25,600	19.7%	2.56
Long Distance only - Over 75+ miles	160,400	30.5%	71,100	54.8%	2.26
<b>Total Visits</b>	<b>526,400</b>	<b>100.0%</b>	<b>129,800</b>	<b>100.0%</b>	<b>4.06</b>

Source: Placer.ai

# The Big House

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**Location:** Tavares, FL

**Owner:** Private (Chet Lemon)

**Operator:** Private (Chet Lemon & Gigi Lemon)

## Sports Features:

- 9 basketball courts
- 16 volleyball courts
- 14 outdoor sand volleyball courts
- Indoor turf field

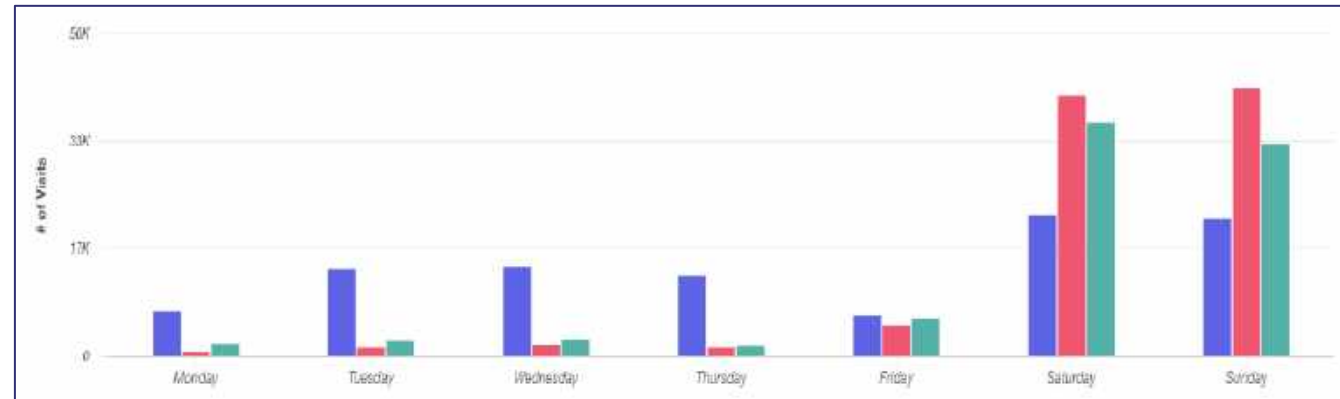
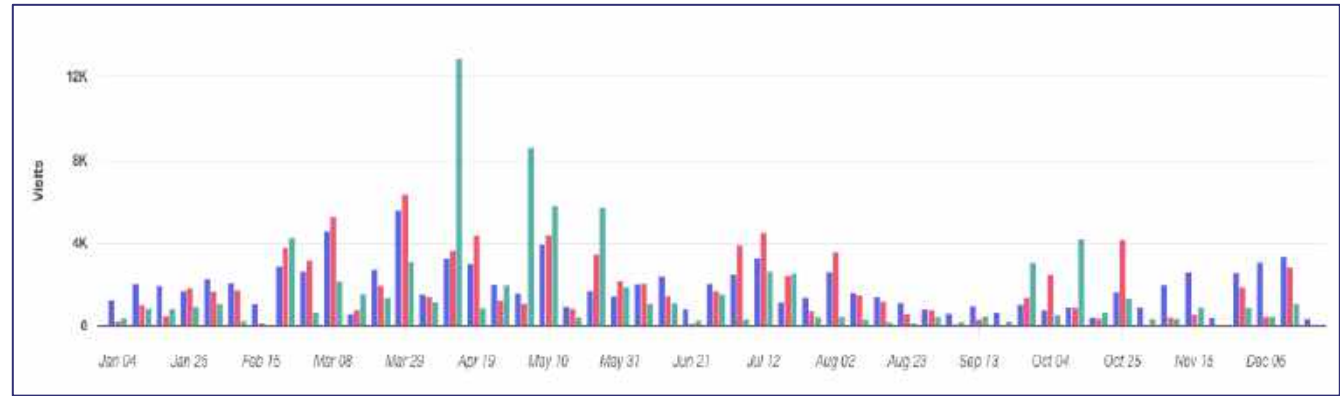
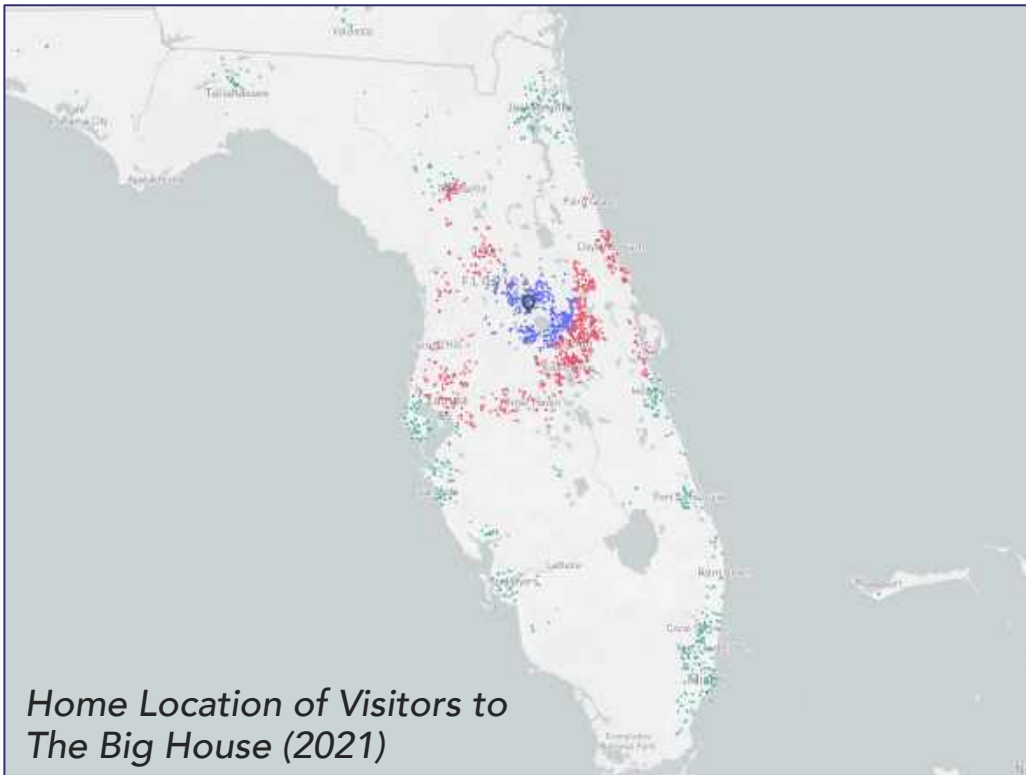
## Notes:

The Big House is a 162,000 square foot facility that includes 14 outdoor sand volleyball courts, an indoor turf field, health and wellness center, concession teaching kitchen, pro shop, and auditorium. The complex hosts a variety of local and regional sports tournaments, leagues, local community events, camps, and clinics. The Big House is the most popular tournament facility for youth basketball programs in the area.



# The Big House Visitation

As one of the only tournament facilities, visitation across local, regional, and long-distance visitors was evenly split in 2021. Strong weekend visitation from regional and long-distance visitors indicate the facility's dominant tournament presence. There is also significant visitation from the Seminole County area which shows demand for the proposed Project.



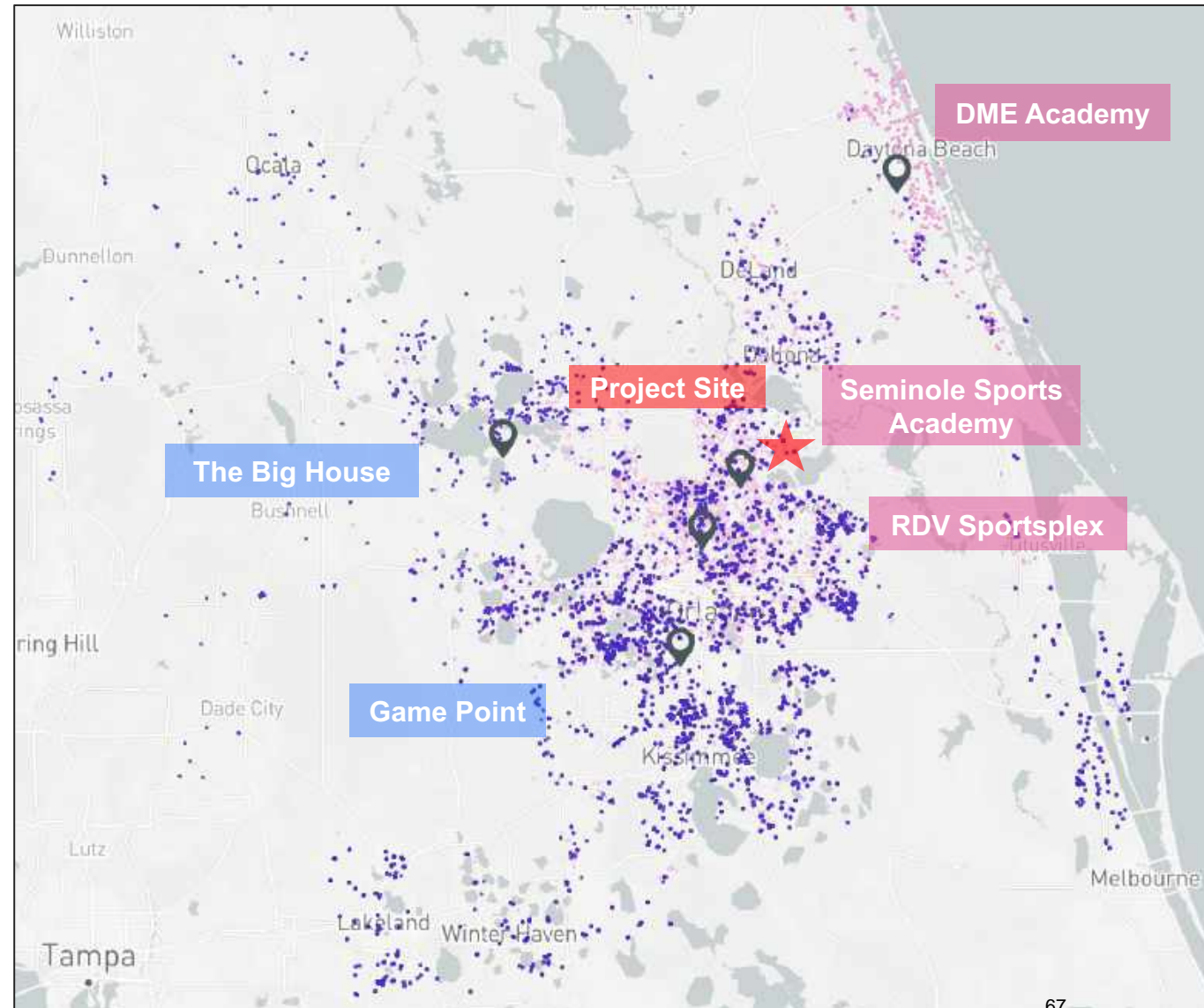
The Big House - Tavares, FL January 2021 - December 2021					
Visitor Origins by Distance from Site Colors correspond to charts & maps	Total Visits		Total Unique Customers		Avg. Visits per Customer
	Est. Number of Visits	Percent of Total Visits	Est. Number of Customers	Percent of Total Customers	
Locals - Within 25 miles	96,600	35.4%	18,800	20.5%	5.14
Regional Distance - Over 25 miles & Less Than 75 miles	92,200	33.8%	34,900	38.1%	2.64
Long Distance only - Over 75+ miles	83,800	30.7%	37,900	41.4%	2.21
<b>Total Visits</b>	<b>272,600</b>	<b>100.0%</b>	<b>91,600</b>	<b>100.0%</b>	<b>2.98</b>

Source: Placer.ai



# Central Florida Tournament Facilities

The adjacent map displays the visitation difference between main tournament facilities in Central Florida. Both tournament facilities and the smaller indoor court facilities draw a large amount of visitation from Seminole County. Game Point Event Center and The Big House have a substantially larger local and regional presence throughout Central Florida. This demonstrates that weekly demand is strong. As mentioned in prior slides, both facilities also see significant long-distance visitation during tournament weekends.



# ESPN Wide World of Sports Complex

**Location:** Orlando, FL

**Owner/Operator:** Disney

**Sports Features:**

- 32 Volleyball Courts
- 20 Basketball Courts

**Notes:**

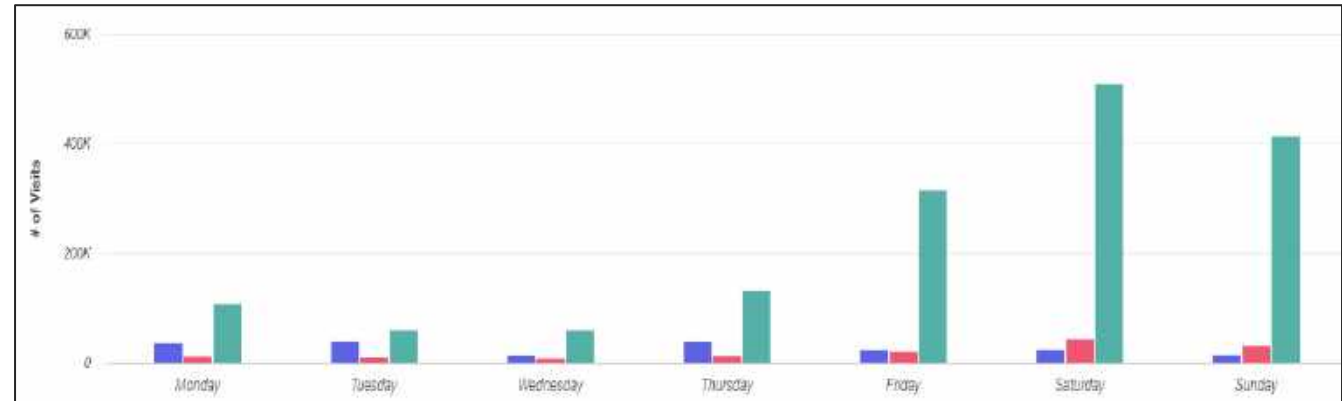
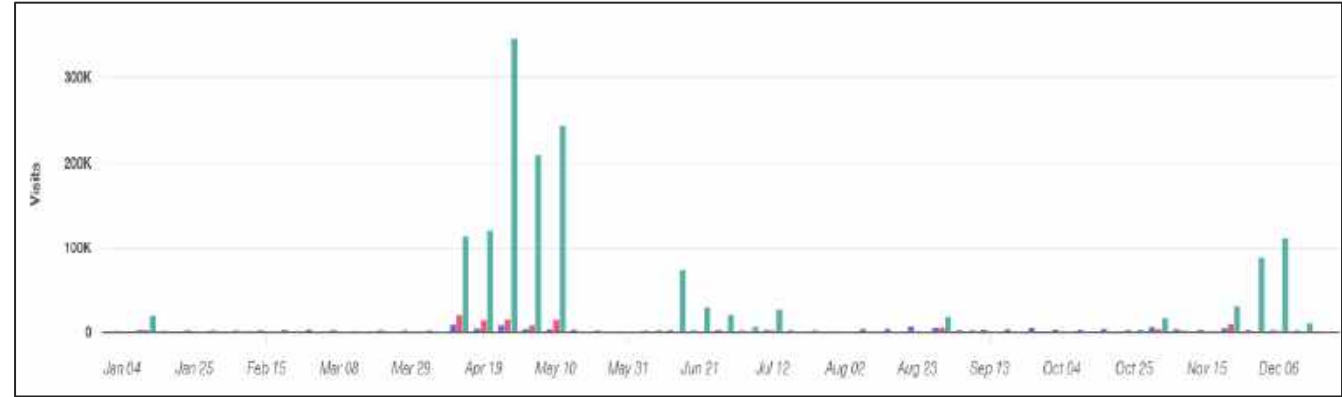
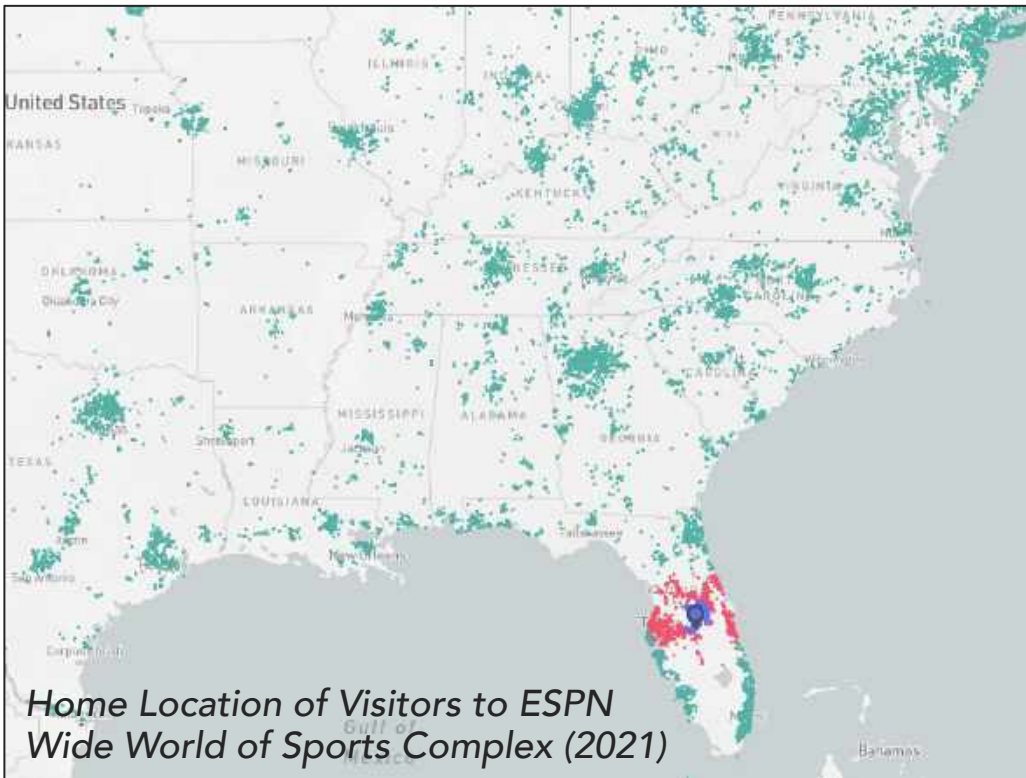
Opened in 1997, the ESPN Wide World of Sports Complex, is a 220-acre multi-purpose youth sports mecca that boasts top of the line facilities for a variety of sports, excluding hockey. The complex is primarily used for AAU tournaments and college showcases. However, many prominent professional sporting events have taken place at ESPN including the 2020 NBA Bubble, MLS is Back Tournament, and Pro Bowl Skills Showdown. The complex was the spring training facility for the Atlanta Braves from 1997 to 2019. In addition, the complex hosted the 2022 Special USA Olympic Games. Given the caliber of tournaments and events, this facility is not competitive with the local supply due to a multitude of factors such as its pricing structure and accommodations.





# ESPN Wide World of Sports Complex Visitation

In 2021, the complex received over 1.9 million visits, 83 percent of which were from long-distance visitors. The facility relies on major youth sports tournaments, national events, and professional games to attract visitation to the facility.



ESPN Wide World of Sports Complex - Orlando, FL  
January 2021 - December 2021

Visitor Origins by Distance from Site Colors correspond to charts & maps	Total Visits		Total Unique Customers		Avg. Visits per Customer
	Est. Number of Visits	Percent of Total Visits	Est. Number of Customers	Percent of Total Customers	
Locals - Within 25 miles	194,400	10.1%	26,600	3.3%	7.31
Regional Distance - Over 25 miles & Less Than 75 miles	139,300	7.2%	54,700	6.8%	2.55
Long Distance only - Over 75+ miles	1,600,000	82.7%	723,000	89.9%	2.21
Total Visits	1,933,700	100.0%	804,300	100.0%	2.40

Source: Placer.ai



# Interview: ESPN Wide World of Sports Complex

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HSP interviewed management at Disney's ESPN Wide World of Sports Complex to understand the operations and tournament schedule for the facility to understand the current landscape in the greater Orlando market. The following are key takeaways from our interview:

- ESPN Wide World of Sports indoor sports facilities feature three fieldhouses with the recently constructed 7,000-seat Advent Arena that cost approximately \$30 million to build.
- ESPN Wide World of Sports tournament supply mainly consists of one AAU tournament per year and college showcases. Tournaments are based on room nights and have to meet specific criteria set by Disney. The incremental value has gone down significantly because of the requirements set in place.
  - Management receives a lot of inquiries to utilize the facilities (on average minimally 2-3 calls per month) however, they have to turn away a lot of business when there is no direct value (room nights, etc.).
  - When ESPN turns away business, they look at local facilities to fulfill the needs and refer business. During conversations about a potential new indoor tournament facility in Seminole County, management did not see this as direct competition given the caliber Disney operates and was interested in working together on a referral basis to help facilitate tournament needs they cannot accommodate.

# Local Market Implications

- In the local market, there is a shortage of indoor multi-court facilities. **Only two facilities in Central Florida consistently host tournaments aside from the major convention centers.**
- Several volleyball and basketball organizations have developed their own small indoor facilities to control court time and build the clubs' presence. Most of these facilities were designed to be training facilities and accommodate local weekday usage.
- **Local clubs have expressed strong interest in being anchor tenants in a new facility.**
- Tournament operators indicated that facilities across Central Florida are not built to standards, causing them look elsewhere for tournament venues.
- In the past, facilities only focused on court space. Today, tournaments require many more amenities.
- Important amenities mentioned include the following: an ample service room, proper ceiling height, a spectator area, sufficient benches and more.
- ESPN Wide World of Sports was built to be ideal for large national tournaments, but extremely high fees and the structure of the tournaments deter operators from using the venue.





# 05

## Regional Sports Facility Analysis

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# Regional Sports Facility Analysis

Relevant Comparable Competitive Facility Supply								
Facility Name	Location	Distance from Site (miles)	Volleyball Courts	Basketball Courts	2021 Visitation	2021 Visitors	% of Total Visits within 25 Miles	% of Total Visits from 75+ Miles
AdventHealth Fieldhouse	Winter Haven, FL	76.9	12	6	260,100	105,600	32%	35%
Sports Edge	Jacksonville, FL	114.0	11	3	403,400	83,300	66%	23%
Wiregrass Sports Campus	Wesley Chapel, FL	124.0	16	8	364,500	95,300	53%	25%
Pick A Ball Sports Complex	Deerfield Beach, FL	207.0	8	6	611,900	111,100	70%	9%
<i>Totals/Average</i>			47	23	<i>409,975</i>	<i>98,825</i>	<i>55%</i>	<i>23%</i>

Source: Hunden Strategic Partners, Various Facilities

HSP analyzed the regional market for comparable and competitive facilities to the proposed Project to compile the supply for tournament facilities. After speaking with local organizations, regional tournament operators and market research, the relevant supply was determined to include four facilities. There are additional tournament facilities within the state that are not directly competitive with the project and multiple facilities that are proposed and under construction. Although these facilities are not directly competitive and not yet operational, HSP provided profiles within this chapter and included them within the regional facility map.

# Regional Sports Facility Map

The supply of tournament facilities are spread throughout the state, with a strong distribution along Interstate 75 between Gainesville and Tampa.

The Project Site has strong accessibility located in the middle of the state, along Interstate 4 and near Interstate 95. As a central hub within the state, the Project is well-positioned to become a regional hub within Florida.

The two under construction and proposed facilities are slated to be competitive to the Project. These facilities are found in the northern part of the state in Gainesville and Panama City Beach.



# AdventHealth Fieldhouse

**Location:** Winter Haven, FL

**Opened:** 2020

**Owner/Operator:** City of Winter Haven/Polk County Tourism and Sports Marketing

**Sports Features:**

- 6 basketball courts
- 12 volleyball courts

**Notes:**

The AdventHealth Fieldhouse and Conference Center is a multipurpose building totaling 58,400 square feet. The facility features a second-floor observation area, a blackbox theater, classrooms, meeting rooms, locker rooms and a fitness center.

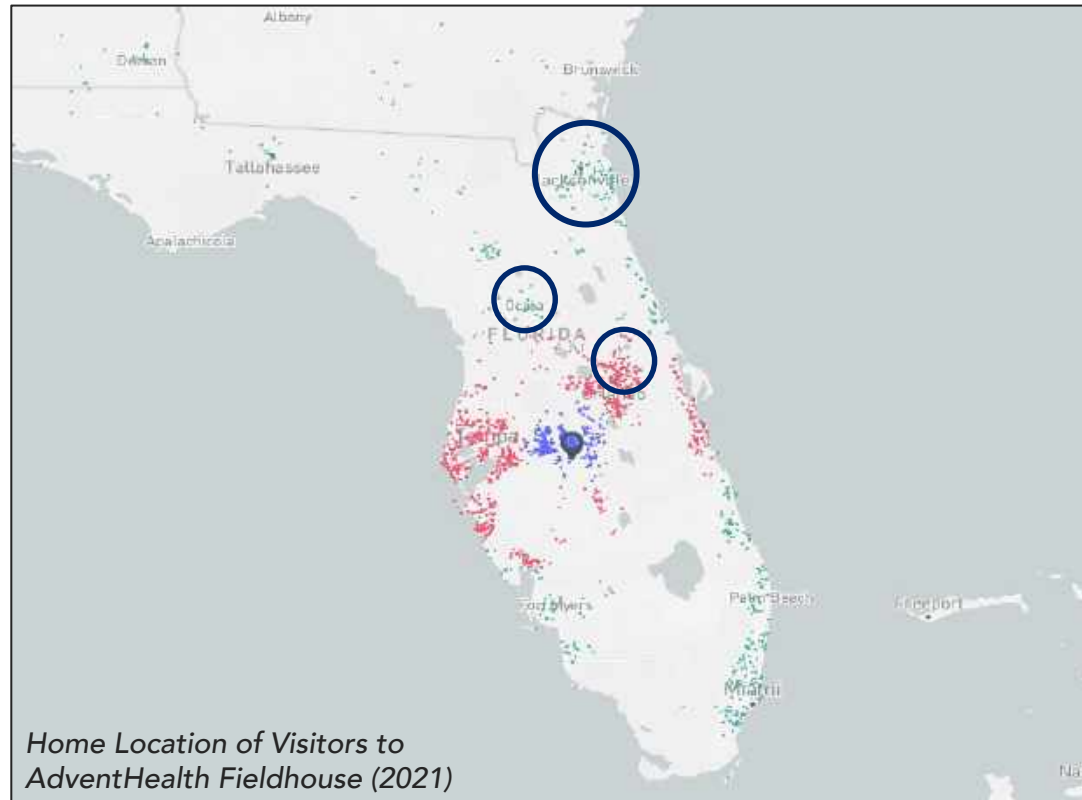
The facility was built in partnership with the Lakeland Magic organization to serve as the team’s basketball training and practice facility. The facility also hosts tournaments throughout the year to spur tourism within the county.





# AdventHealth Fieldhouse Visitation

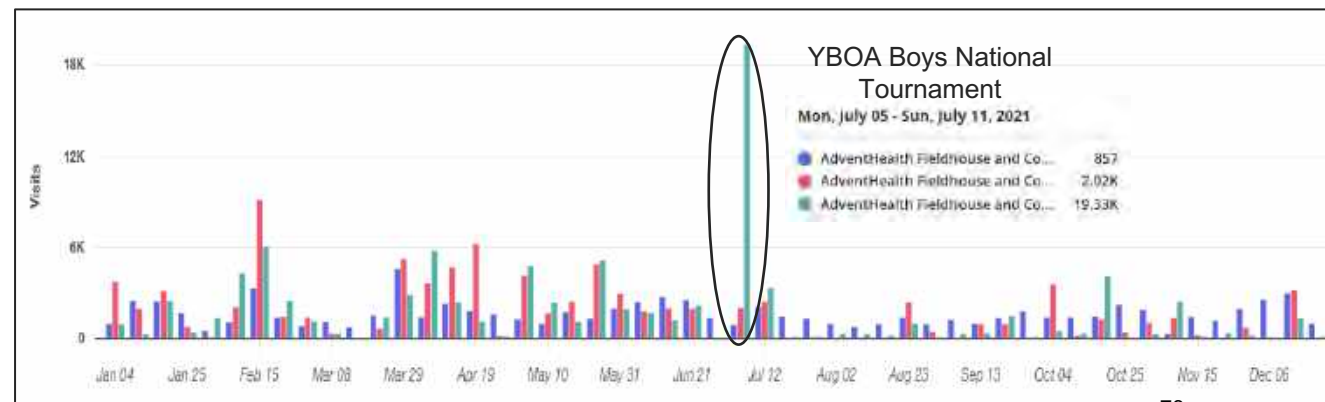
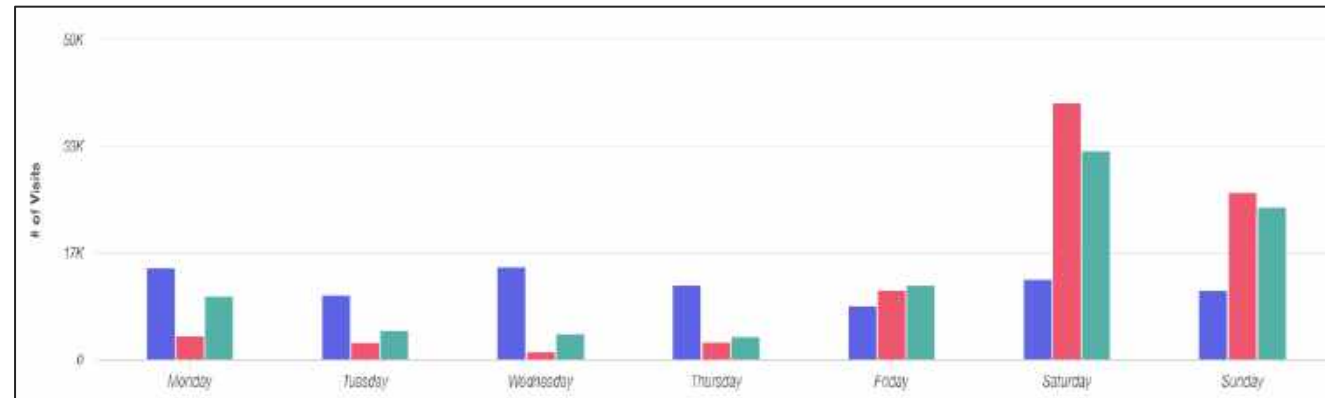
The AdventHealth Fieldhouse is located between Orlando and Tampa, giving the facility the locational advantage of attracting visitation from both markets. Visitation by day shows that on Saturday and Sunday, visitation from within these markets provides the facility with the highest volume of participation for tournaments.



AdventHealth Fieldhouse - Winter Haven, FL  
January 2021 - December 2021

Visitor Origins by Distance from Site	Total Visits		Total Unique Customers		Avg. Visits per Customer
	Est. Number of Visits	Percent of Total Visits	Est. Number of Customers	Percent of Total Customers	
Locals - Within 25 miles	82,300	32%	21,400	20%	3.85
Regional Distance - Between 25 and 75 miles	87,600	34%	43,500	41%	2.01
Long Distance only - Over 75 miles	90,200	35%	40,700	39%	2.22
<b>Total Visits</b>	<b>260,100</b>	<b>100%</b>	<b>105,600</b>	<b>100%</b>	<b>2.46</b>

Source: Placer.ai



# Sports Edge

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**Location:** Jacksonville, FL

**Opened:** 2016

**Owner/Operator:** Sports Edge

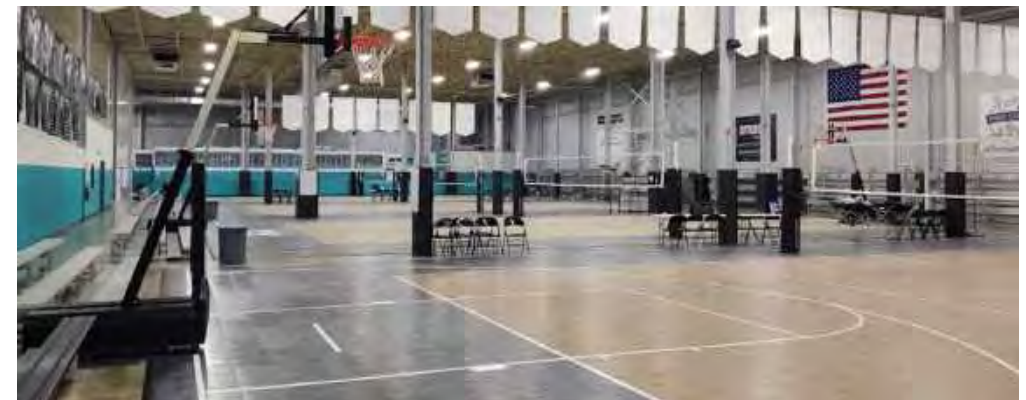
## Sports Features:

- 3 basketball courts
- 11 volleyball courts

## Notes:

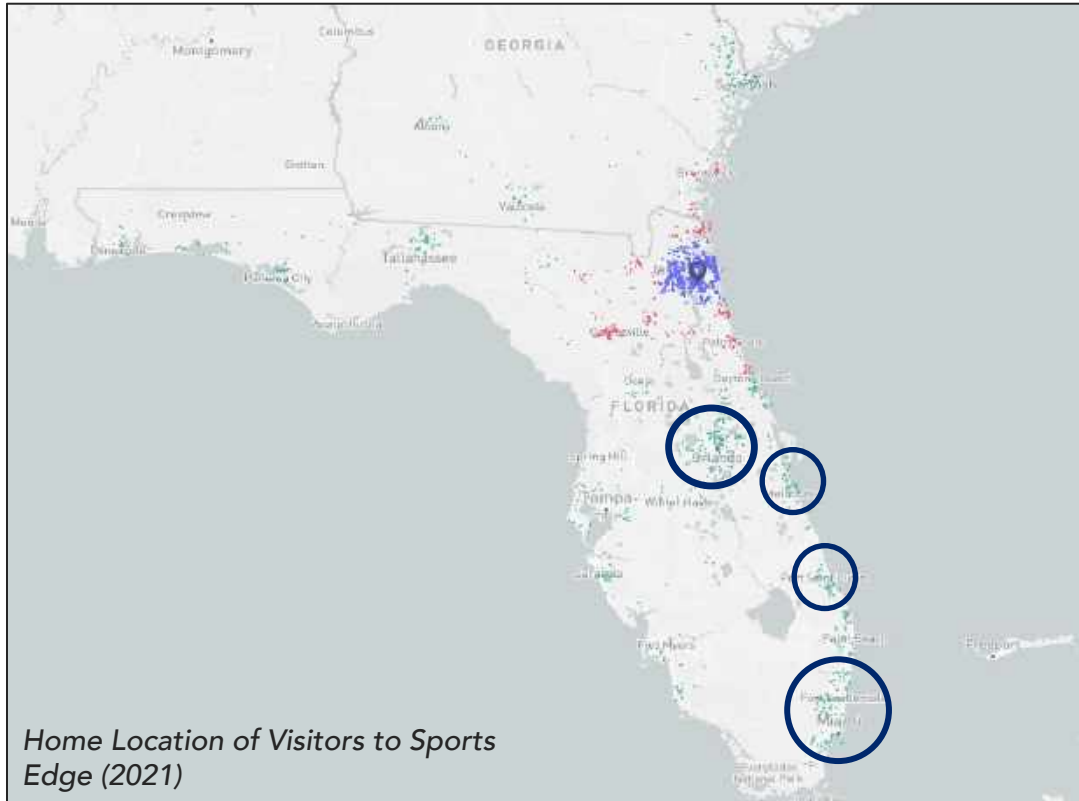
Sports Edge is a 75,000 square foot indoor facility that is home to Jacksonville Juniors Volleyball Association (JJVA) and Sports Edge in-house baseball and basketball. The facility also features a 4,000 square foot training center, an 800 square foot party room and 1,500 square feet of meeting and conference space.

Sports Edge has announced a second, indoor facility is planned in St. John's County. The facility will be included in two phases, with phase one including ten beach volleyball courts and phase two including eight volleyball courts, four basketball courts, two multipurpose turf fields and a fitness center.



# Sports Edge Visitation

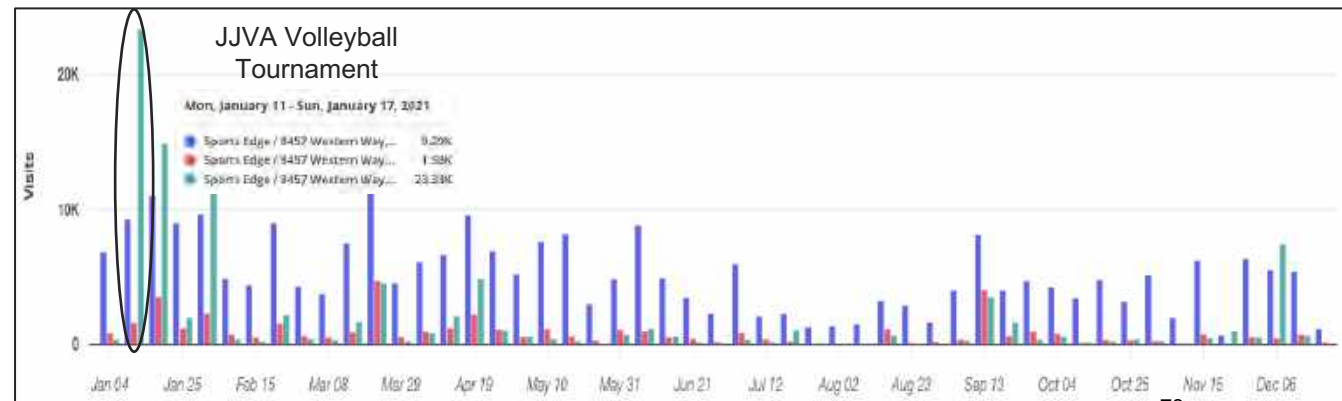
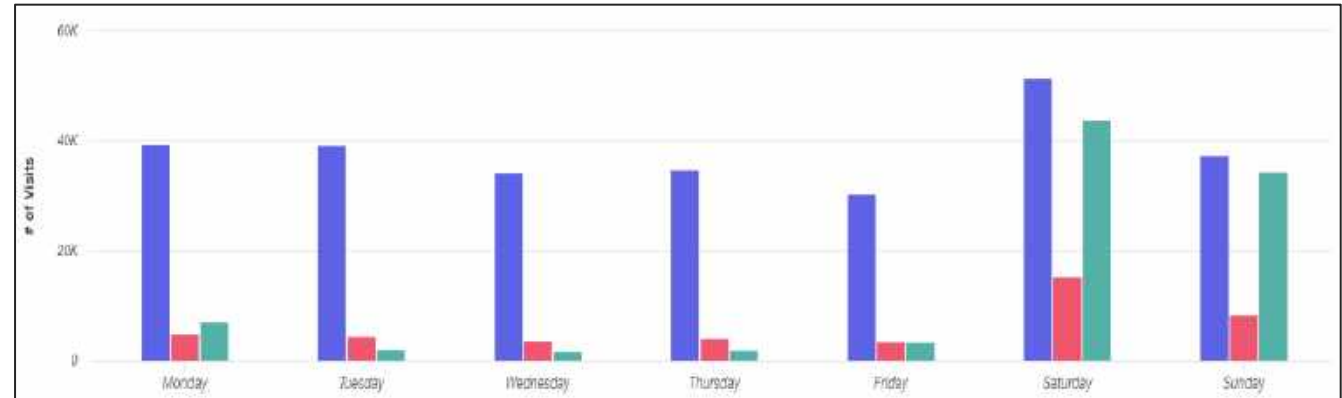
Despite Sports Edge's location in northern Florida, the majority of the facility's visitation comes from in-state. Visitation data shows visitors to the facility leaving the Orlando market or passing by the MSA to travel a further distance north. This presents an opportunity for the Project to take advantage of its central location within the state and to take business from other competitive markets.



Sports Edge - Jacksonville, FL  
January 2021 - December 2021

Visitor Origins by Distance from Site	Total Visits		Total Unique Customers		Avg. Visits per Customer
	Est. Number of Visits	Percent of Total Visits	Est. Number of Customers	Percent of Total Customers	
Locals - Within 25 miles	265,600	66%	33,900	41%	7.83
Regional Distance - Between 25 and 75 miles	43,800	11%	9,100	11%	4.81
Long Distance only - Over 75 miles	94,000	23%	40,300	48%	2.33
<b>Total Visits</b>	<b>403,400</b>	<b>100%</b>	<b>83,300</b>	<b>100%</b>	<b>4.84</b>

Source: Placer.ai





# Wiregrass Sports Campus

**Location:** Wesley Chapel, FL

**Opened:** 2020

**Owner/Operator:** Pasco County DMO, Experience Florida's Sports Coast and RADDSports

## Sports Features:

- 8 basketball courts
- 16 volleyball courts

## Notes:

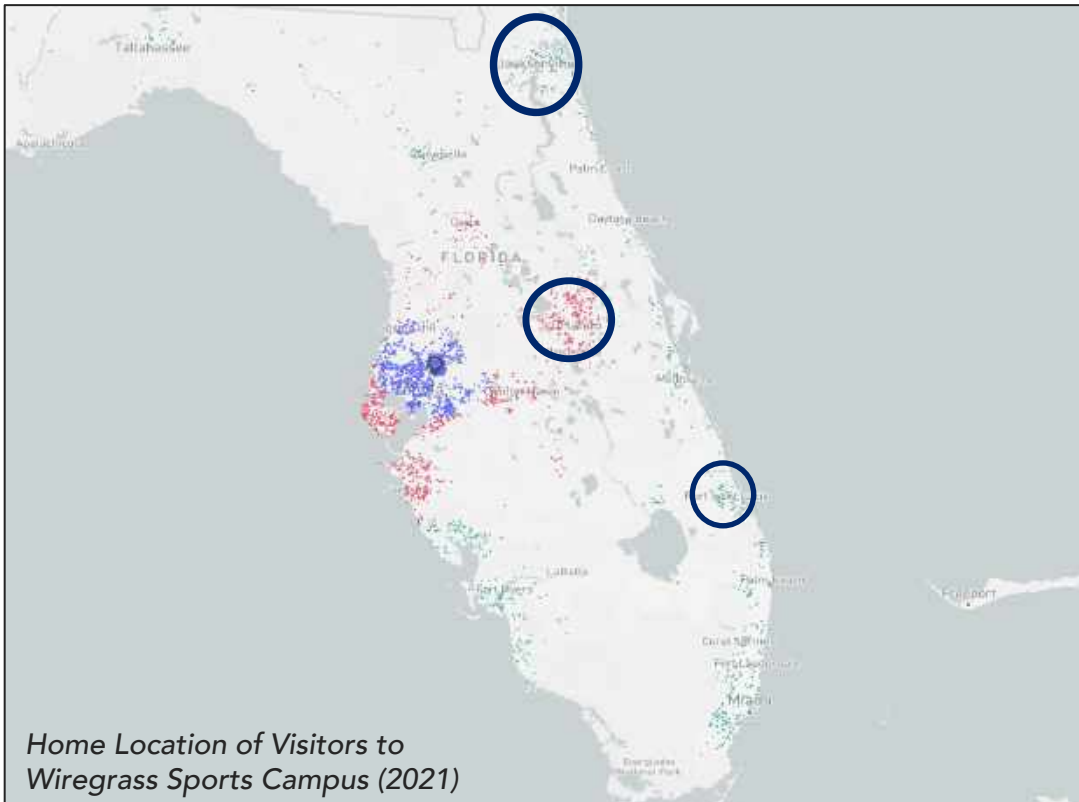
The Wiregrass Sports Campus is a 98,000-square foot facility with 70,000 square feet of hardwood court space. The facility opens at 3 PM Monday through Thursday and is closed for private events and tournaments between Friday and Sunday to provided sports tourism opportunities within the county.

The facility was funded through Tourism Development Tax and cost a total of \$29 million.



# Wiregrass Sports Campus Visitation

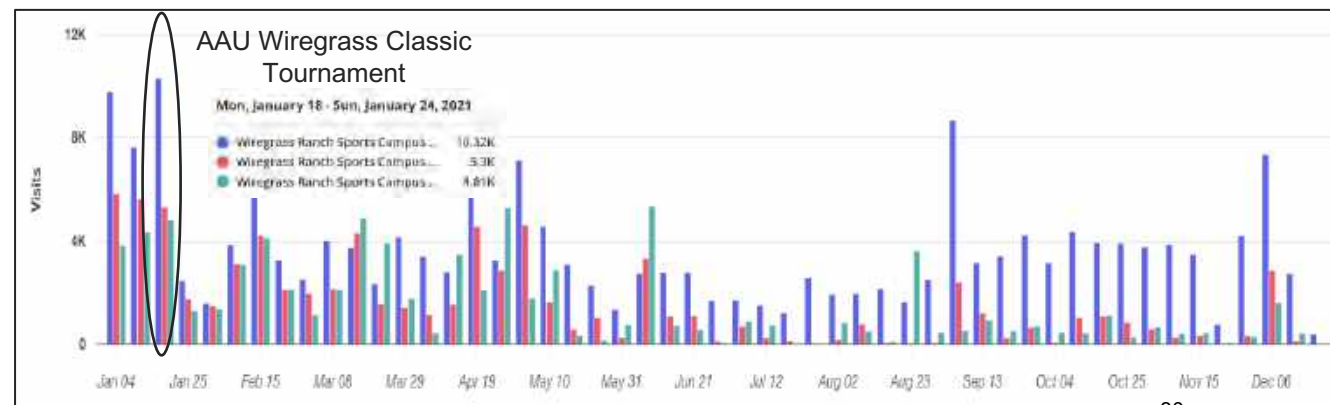
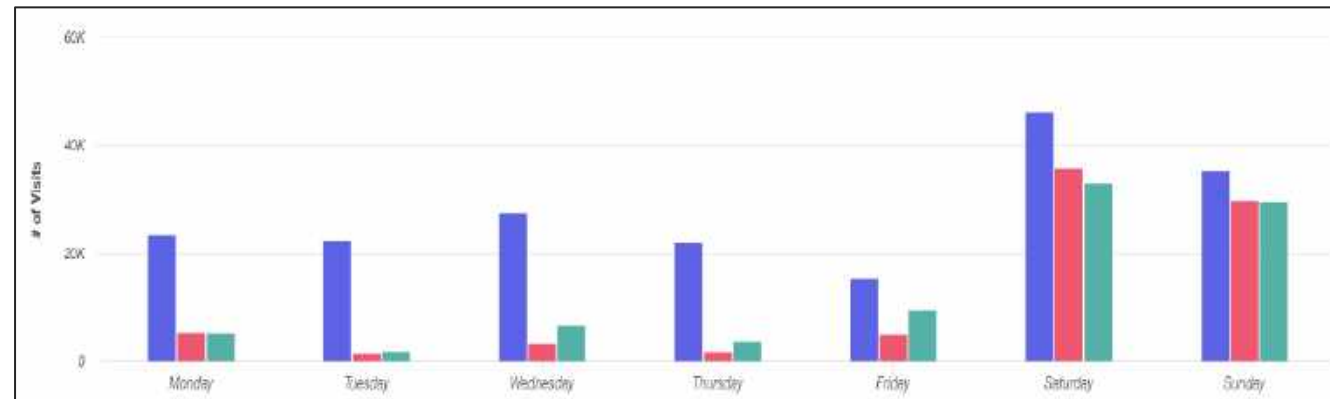
Over 50 percent of Wiregrass Sports' visitation come from within the Tampa-St. Petersburg MSA, but visitation data shows a strong presence of visitors from the Orlando MSA. The facility's data shows consistent spikes in weekly visitation, which aligns with the operating model of remaining reserved for tournament play on the weekends throughout the year.



Wiregrass Sports Campus - Wesley Chapel, FL  
January 2021 - December 2021

Visitor Origins by Distance from Site	Total Visits		Total Unique Customers		Avg. Visits per Customer
	Est. Number of Visits	Percent of Total Visits	Est. Number of Customers	Percent of Total Customers	
Locals - Within 25 miles	192,200	53%	33,800	35%	5.69
Regional Distance - Between 25 and 75 miles	82,600	23%	28,200	30%	2.93
Long Distance only - Over 75 miles	89,700	25%	33,300	35%	2.69
<b>Total Visits</b>	<b>364,500</b>	<b>100%</b>	<b>95,300</b>	<b>100%</b>	<b>3.82</b>

Source: Placer.ai





**Under Construction/Planned**



# Alachua County Sports Complex at Celebration Pointe

**Location:** Gainesville, FL

**Opening:** January 2023

**Owner/Operator:** Alachua County/ RADDSports (Private)

**Cost:** \$38 million

## Sports Features:

- 130,000 square feet of total space (97,000 square feet of court space)
- 13 basketball courts
- 18 volleyball courts
- 21 pickleball courts
- Indoor track and field
- Cheer and dance facility

## Funding:

The project was funded with \$30 million of Tourism Development Tax (paid by Alachua County), \$5.7 million of private investment, and \$2.3 million from the state of Florida.



# Panama City Beach Sports Complex

**Location:** Panama City Beach, FL

**Opening:** N/A

**Owner/Operator:** Panama City/Sports Facilities Companies

**Projected Cost:** \$41 million

## Features:

- 100,000 square feet of total space
- 17,000 square feet of office, meeting and event space
- 8 basketball courts
- 16 volleyball courts
- 24 pickleball courts

## Notes & Funding:

The facility is anticipated to be used as Panama City Beach's emergency operations center, and as a result, the Federal Emergency Management Agency has contributed \$7.7 million towards the project for Bay County. The Bay County Commission approved the hiring of a design firm for the facility in September 2022.





# Regional Market Implications

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- There is a weak supply of regional indoor facilities in Florida. The current regional competition attracts visitation from the greater Orlando market and other major markets within Florida. Visitation data shows that people pass through Seminole County and the greater Orlando area or travel further distances than Seminole County for tournament play. This creates an opportunity for the project to recapture this tournament demand, generate room nights and increase spending overall spending in Seminole County.
- The competitive regional facilities do not attract high volumes of visitation outside of Florida. The Project is centrally located within the state allowing for ease of accessibility from other major markets.







# Competitive Destination Facilities

# Foley Sports Complex

**Location:** Foley, AL

**Opened:** 2009

**Owner/Operator:** City of Foley

## Sports Features:

- 10 baseball fields
- 16 grass fields
  - 1 championship field included (seating for up to 1,000)
- 90,000-square-foot indoor events center

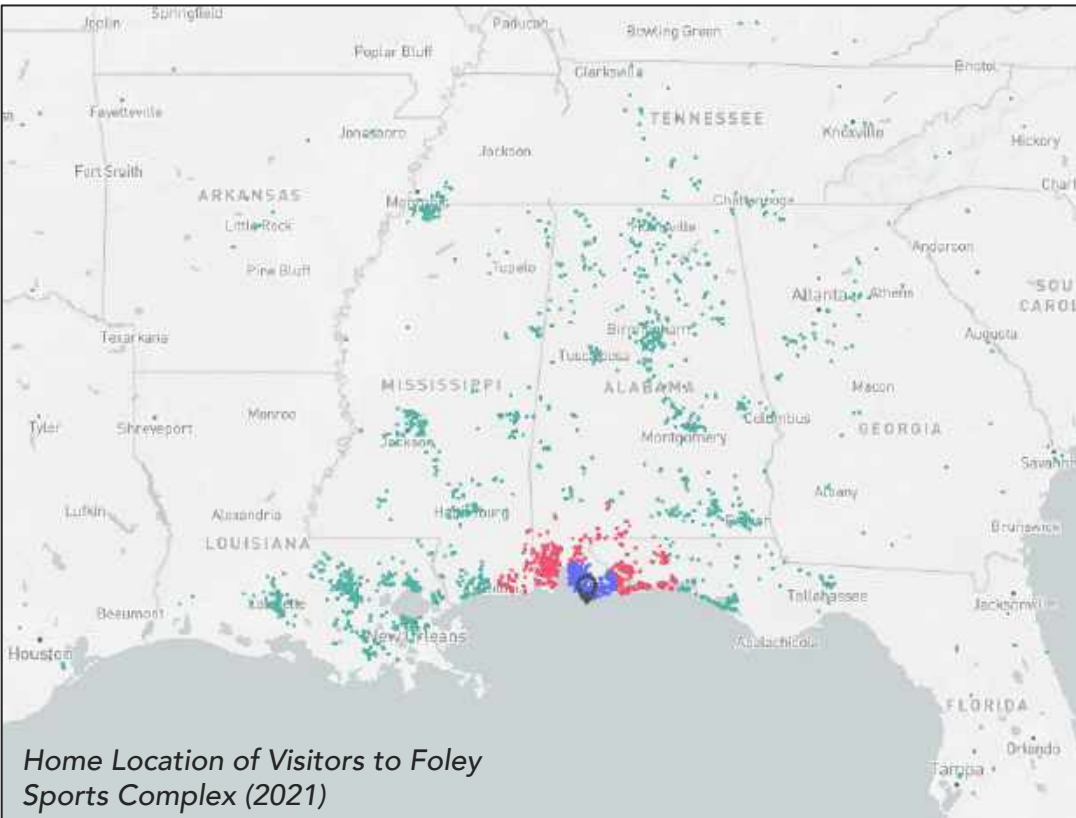
## Notes:

The 100-acre Foley Sports Tourism Complex features 16 multi-purpose grass fields, which includes a championship stadium, along with 90,000 square feet of event center space that accommodates volleyball, basketball and events. The complex is located at OWA, which is a 520-acre family entertainment destination 10 minutes from the beaches in Gulf Shores, Alabama. The sports complex hosts local recreation teams and is a hub for regional competitive tournaments such as the USSSA Baseball World Series and the Alabama Soccer Festival.



# Foley Sports Complex Visitation

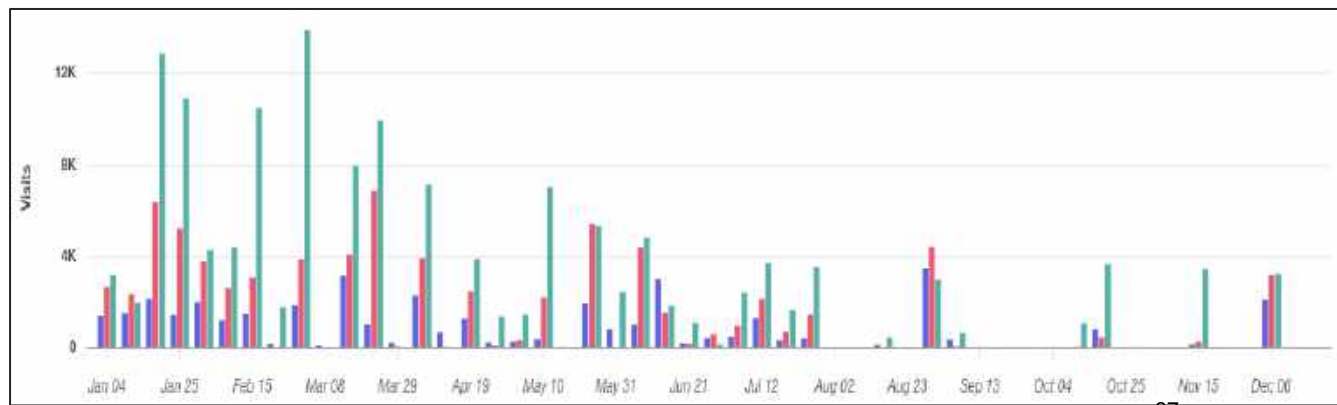
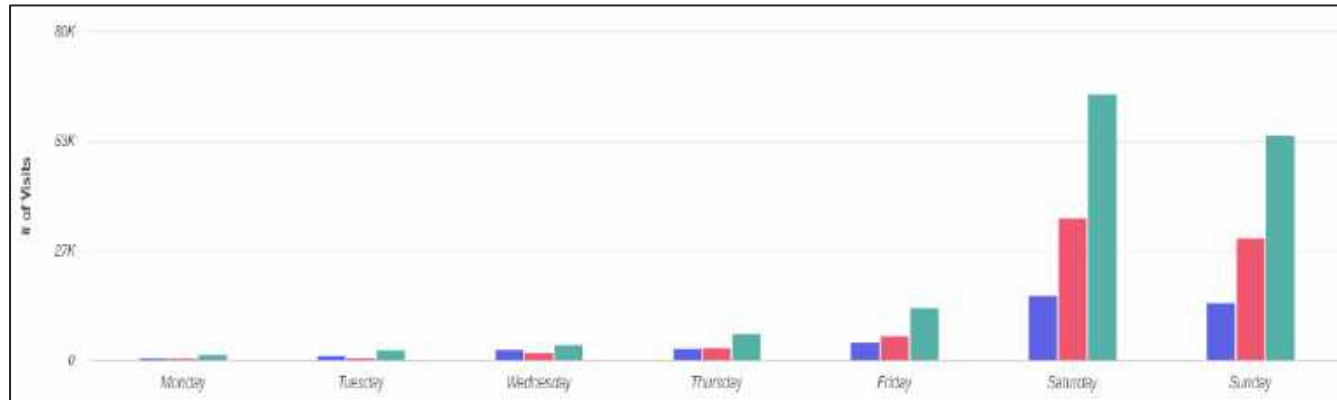
Visitation data reflects visitors to the Foley Sports Complex's indoor event center. Visitors from beyond 75 miles make up the largest segment of visitors to the complex, and visitation throughout the week shows the facility's emphasis on sports tourism and tournament activity.



Foley Sports Complex - Foley, AL  
January 2021 - December 2021

Visitor Origins by Distance from Site	Total Visits		Total Unique Customers		Avg. Visits per Customer
	Est. Number of Visits	Percent of Total Visits	Est. Number of Customers	Percent of Total Customers	
Locals - Within 25 miles	41,000	16%	14,700	13%	2.79
Regional Distance - Between 25 and 75 miles	76,300	29%	29,300	26%	2.60
Long Distance only - Over 75 miles	146,300	56%	67,600	61%	2.16
<b>Total Visits</b>	<b>263,600</b>	<b>100%</b>	<b>111,600</b>	<b>100%</b>	<b>2.36</b>

Source: Placer.ai





# Myrtle Beach Sports Center

**Location:** Myrtle Beach, SC

**Opened:** 2015

**Operator:** Sports Facility Management (SFC)

## Sports Features:

- 8 basketball courts
- 16 volleyball courts

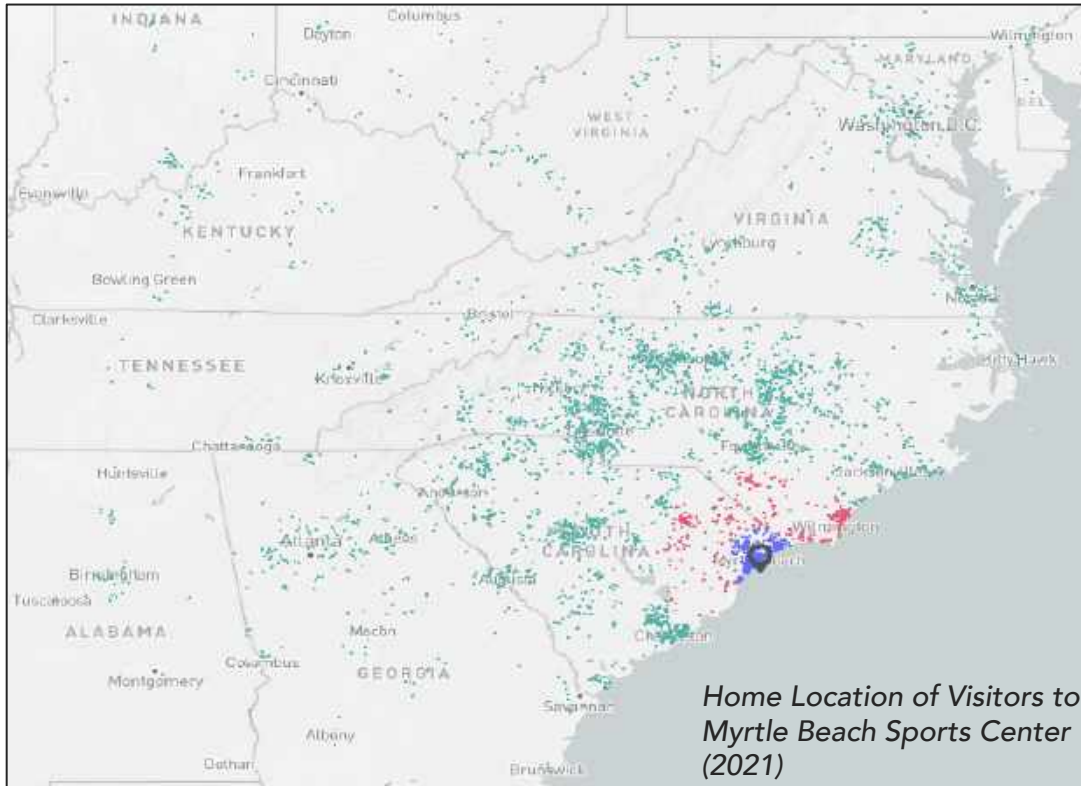
## Notes:

The \$12.4 million sports facility opened in March 2015 adjacent to the Myrtle Beach Convention Center in central Myrtle Beach. The complex includes 8 basketball courts, 16 volleyball courts, a large multi-screen video wall and can seat up to 2,000 spectators on telescopic bleachers. The 100,000-square-foot sports facility host court sports as well as gymnastics, pickleball and table tennis. The venue also hosts trade shows. Onsite amenities include team rooms, an elevated mezzanine, and an indoor/outdoor café.



# Myrtle Beach Sports Center Visitation

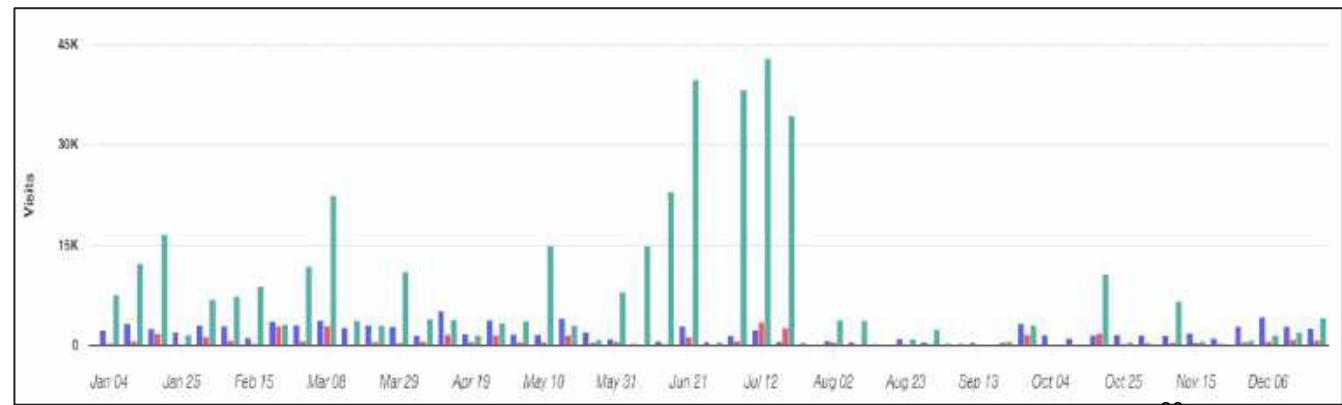
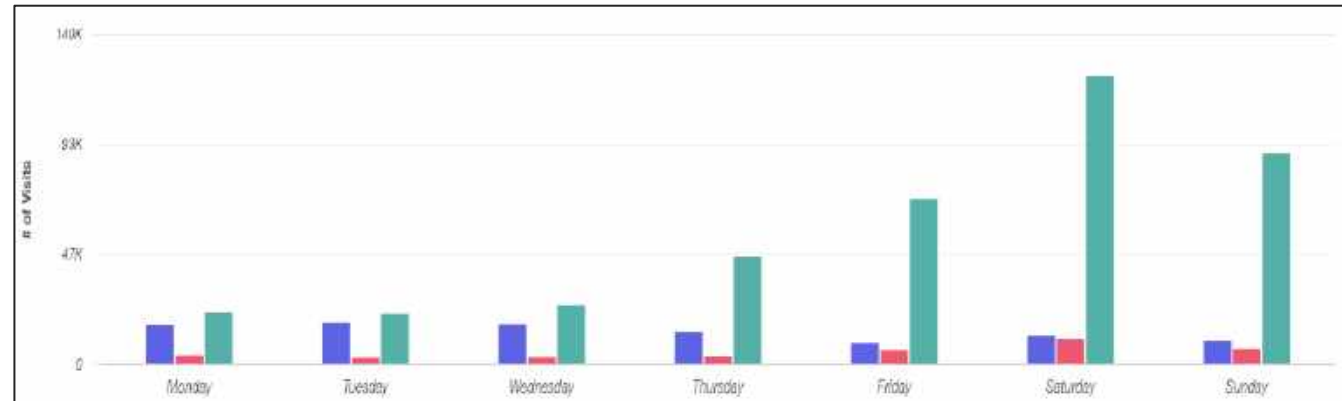
The Myrtle Beach Sports Center targets large regional tournaments, with 75 percent of total visitation coming from beyond 75 miles. Myrtle Beach has combined its leisure tourism draw, restaurants and hotel supply with sports tourism to develop a desirable tournament destination, especially in the summer months.



Myrtle Beach Sports Center - Myrtle Beach, SC  
January 2021 - December 2021

Visitor Origins by Distance from Site	Total Visits		Total Unique Customers		Avg. Visits per Customer
	Est. Number of Visits	Percent of Total Visits	Est. Number of Customers	Percent of Total Customers	
Locals - Within 25 miles	97,800	18%	21,700	10%	4.51
Regional Distance - Between 25 and 75 miles	37,500	7%	15,700	7%	2.39
Long Distance only - Over 75 miles	397,800	75%	189,200	83%	2.10
<b>Total Visits</b>	<b>533,100</b>	<b>100%</b>	<b>226,600</b>	<b>100%</b>	<b>2.35</b>

Source: Placer.ai





# Virginia Beach Sports Center

**Location:** Virginia Beach, VA

**Owner:** City of Virginia Beach

**Operator:** Eastern Sports Management

**Opened:** 2020

**Cost:** \$74.3 Million

## Sports Features:

- 12 basketball Courts
- 24 volleyball Courts
- Indoor track and field facility

## Notes:

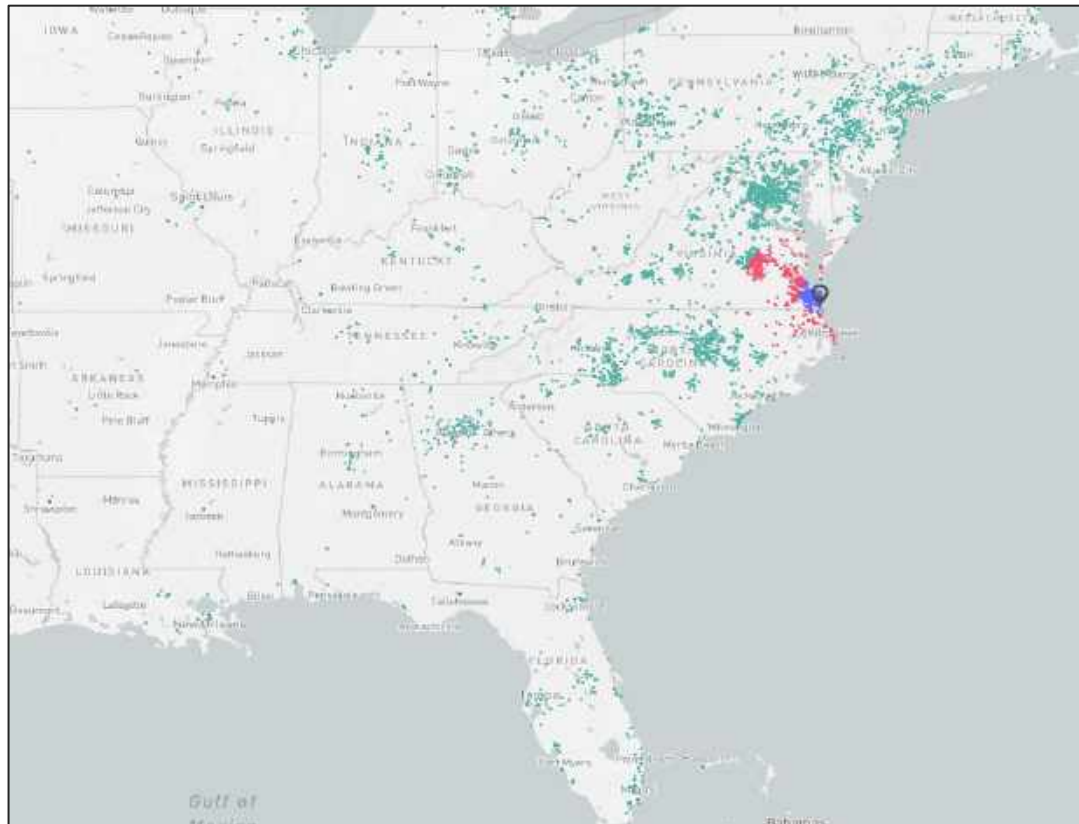
The Virginia Beach Sports Center is located across the street from the Virginia Beach Convention Center. The facility features two wings, one covered in hardwood courts and the other as a track and field surface. Sport courts can be laid over the track and field surface to add six additional basketball courts and 12 additional volleyball courts.





# Virginia Beach Sports Center

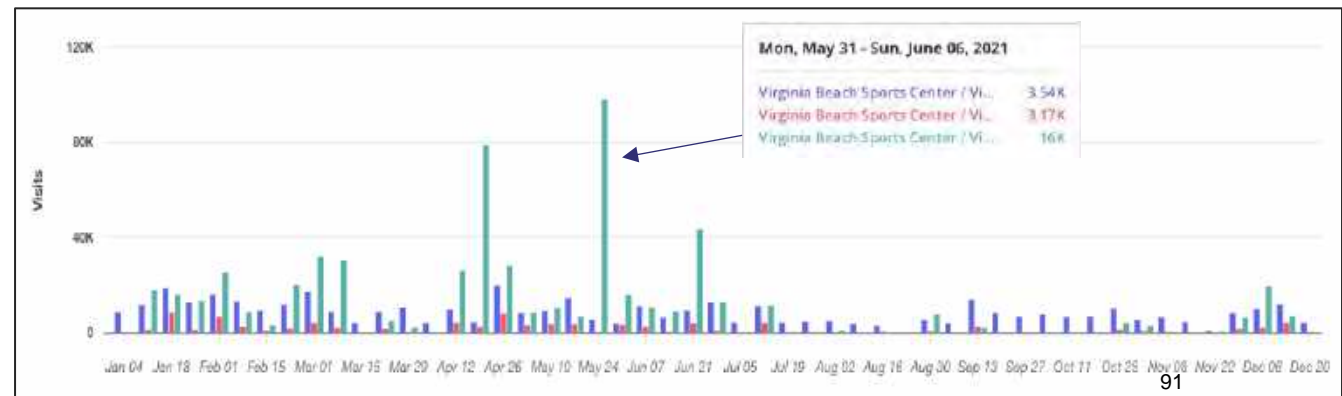
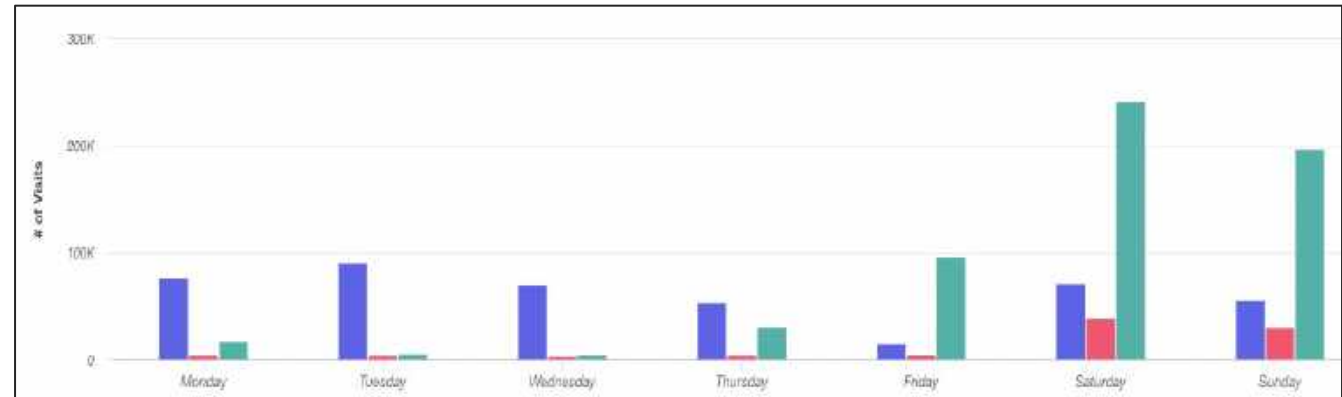
The Virginia Beach Sports Center has rapidly become a popular tournament destination on the east coast. Over 50 percent of the facilities total visitation in 2021 has come from over 100 miles away. Interviews with Eastern Sports Management revealed that the facility has gained popularity because of its synergy with downtown Virginia Beach, which offers strong amenities during tournament down time.



Virginia Beach Sports Center - Virginia Beach, VA  
January 2021 - December 2021

Visitor Origins by Distance from Site	Total Visits		Total Unique Customers		Avg. Visits per Customer
	Est. Number of Visits	Percent of Total Visits	Est. Number of Customers	Percent of Total Customers	
Locals - Within 25 miles	432,700	39%	58,000	20%	7.46
Regional Distance - Between 25 and 100 miles	92,900	8%	28,500	10%	3.26
Long Distance only - Over 100 miles	595,200	53%	209,000	71%	2.85
<b>Total Visits</b>	<b>1,120,800</b>	<b>100%</b>	<b>295,500</b>	<b>100%</b>	<b>3.79</b>

Source: Placer.ai





# 06

## Sports Tournament and Opportunity Analysis

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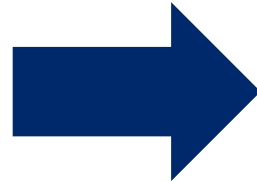
# Capturing Tournament Demand

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## Factors Driving Tournament Demand & Activity:

There are several factors that impact a city's ability to capture large tournaments. These factors include the following:

- Number and quality of fields and playing surfaces
- Strong on/off-site amenities and attractions
- Accessibility, by Air and by Car



Cities with stronger packages of the above listed items will be more successful in attracting major tournament groups. These major tournament groups garner a nationwide pull for tournaments which bring in teams from surrounding states and across the country.

## Opportunities in Central Florida:

- 9 basketball and 18 volleyball courts would be one of the largest facilities in the Orlando market, giving Seminole County the opportunity to host regional/national indoor tournaments.
- A new indoor tournament facility in the market could help attract a higher caliber of tournaments that would not have to rely on the Orange County Convention Center for ample tournament space. There is currently two other facilities in the market that would be potentially competitive for tournaments, however, large enough tournaments could utilize multiple facilities for one weekend.



# Tournament Operators

HSP spoke with several tournament organizations that operate in the area across several indoor sports.

Basketball and volleyball tournaments are typically run by local clubs or facility owners, however, there are a few large governing bodies that run tournaments as well. One of these organizations includes the Amateur Athletic Union (AAU), which has several members within Central Florida basketball and volleyball. USA Volleyball operates all over the country and has a dedicated Florida region that has a substantial tournament presence in the state.

The following section provides summaries of interviews with these organizations and various local organizations within the greater Orlando market.



**USA Volleyball**

**3STEP**  
SPORTS



# Alternative Sport Opportunities

HSP has identified other sports and functions that are growing significantly that can utilize indoor space to fill times and keep the facility efficient.



## Pickleball

- Pickleball is a fast-growing sport that has gained significant popularity recently. The sport can be played on hard courts surfaces or tennis courts. The indoor courts can be utilized for pickleball during the morning and afternoon hours when youth programs are slow. This optimizes facility usage and mitigates down time.

## Futsal

- Futsal is a very popular sport that is typically played on hard court space and fits within a basketball court. Futsal tournaments at the facility can fill in slow seasons where basketball and volleyball slow up.

## Expos & Events

- A multi-purpose indoor event space can accommodate more than just sports when need be. With unobstructed event space, the indoor sports complex could accommodate local community events such as graduations or be used as an emergency relief center when need be.

# Interview: USA Volleyball

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HSP interviewed USA Volleyball to understand the current tournament landscape for volleyball and the potential for additional tournament opportunities in the region. The interview indicated the following:

- USA Volleyball registration has been growing rapidly. They are currently 153 clubs or approximately 13,000 teams. With more than 17,000 players in Florida, **USA Volleyball was able to sanction approximately 50 events in the past year. Volleyball has become the largest high school team sport in the state and continues to grow.**
- USA Volleyball not only includes indoor volleyball, but also beach and grass volleyball for youth leagues and adult amateur leagues given the growing interest within the state.
- In the Orlando market, **USA Volleyball primarily uses Game Point Event Center and The Big House for sanctioned tournaments.** USA Volleyball noted difficulties when working with The Big House and structural issues when working with Game Point. **USA Volleyball sanctioned events throughout Florida range from 8 court facilities to national tournaments requiring 110 courts.**
  - Bigger tournaments and events held throughout the state will be held at either Orange County Convention Center, Tampa Convention Center, Daytona Beach Convention Center or the Fort Lauderdale Convention Center.
- **Facility design is incredibly important when looking to attract national tournaments and events.** If a facility does not have ample service room or sufficient space for parents and players, tournament operators will not use a facility.



# Interview: TNBA (AAU)

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HSP interviewed TNBA to understand the potential for additional tournament opportunities in the region and to gain a deeper understanding of the overall market. The interview indicated the following:

- TNBA is one of the larger tournament operators in Central Florida. The organization runs roughly 30 tournaments nationally on an annual basis. They also run youth programs that are affiliated with the NBA.
  - Within the Florida region, **TNBA will put on approximately 16 tournaments per year** and mainly utilize the Big House, Game Point Event Center and Pick A Ball Sports Complex in Deerfield Beach.
  - **Tournaments require different facilities with at least 6 courts that can host about 80 teams per tournament. There is a huge need for additional tournament facilities in order to diversify the tournament offerings and competition levels.**
- Another facility is needed in the area for several reasons. **These include lack of tournament capable court facilities, a growing interest in basketball, facility fee structures, court layout, and management difficulties.**
  - Hourly court rentals can range from \$40 per court to \$150 per court because of the limited supply. Rates also depend on the ability to conduct tournaments through the public versus private sector.
- Popular tournament facilities in the southeast and throughout the country include Lake Point in Georgia, a new facility outside of Virginia Beach, Drive Nation in Irving, Texas (which are all 10+ courts).
- In addition to TNBA, there are about two to three main basketball tournament operators in the Orlando area competing for court space.

# Interview: 3Step Sports

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HSP spoke with upper-level management at 3Step Sports to understand the current tournament operations and potential opportunities for the organization in the region. The interview indicated the following:

- 3Step Sports organization has grown immensely over the years. Currently, the organization runs over 800 events in 43 states across 8 different sports. The largest sports for the organization is basketball followed by soccer and volleyball.
- **Florida is a challenging state to host tournaments because of the lack of quality with facilities.** The organization noted that it has been difficult to do business with Disney and therefore won't host tournaments at ESPN Wide World of Sports. The need for indoor facilities is huge in the area.
  - **An ideal indoor facility would have 8 to 10 basketball courts and 16+ volleyball courts to be full year-round.**
  - **3Step would be interested in conducting tournaments in the market and potentially explore the idea of having a master lease with a set amount of dates for events.** The facility should serve as a hub for tournaments where if extra court space is needed they could utilize local high schools or smaller facilities in the area as secondary sites.



# 08

## Support Amenities: Hotel & Restaurant Analysis

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# Hotel Market Analysis

# Local Lodging Summary

HSP, using data from Smith Travel Research, identified the 50 closest hotels within a 15-mile radius of the Project site.

The local lodging supply mainly consists of Upper Midscale, Upper Upscale and Upscale properties at 28, 22 and 21 percent, respectively.

This supply includes 50 hotel properties that total nearly 6,000 rooms. The average age of the hotel supply is 21 years with recent developments continuing to focus on Upper Midscale and Upscale properties.

Lodging Summary - Seminole County (Within a 15-mile radius)						
Chainscale	Rooms	% of Total Rooms	Hotels	Rooms per Hotel	Avg Year Open / Renovated	Avg Age (Years)
Upper Upscale	1,324	22%	5	265	2017	5
Upscale	1,237	21%	10	124	2004	19
Upper Midscale	1,694	28%	15	113	2006	16
Midscale	367	6%	3	122	2007	15
Economy	923	15%	8	115	1997	25
Independent	443	7%	9	49	1980	42
Total/Average	5,988	100%	50	131	2002	20

Source: Smith Travel Research, CoStar, Hotel websites, Hunden Strategic Partners

# Local Hotel Supply Analysis

HSP identified the hotel competitive set in Seminole County by conducting market research and interviewing local hoteliers. HSP believes that the competitive set in the table below best reflects the sports lodging market in the area and its performance. There are 11 hotels in the competitive set that range from Upper Midscale to Upscale with 83 rooms to 309 rooms. The majority of hotels in the local supply are approximately eight miles from the Project site.

Seminole County Competitive Hotel Supply					
Property Name	City	Miles from Site	Rooms	Year Built / Renovated	Hotel Class
SpringHill Suites Orlando North/Sanford	Sanford, FL	7.8	105	2000	Upscale
Comfort Inn & Suites Orlando North Sanford	Sanford, FL	7.9	107	2002	Upper Midscale
Residence Inn By Marriott Orlando Lake Mary	Lake Mary, FL	8.4	119	2009	Upscale
Marriott Orlando Lake Mary	Lake Mary, FL	8.4	307	2018	Upper Upscale
Hampton Inn & Suites Lake Mary At Colonial Townpark	Lake Mary, FL	8.4	130	2016	Upper Midscale
Hilton Garden Inn Orlando North Lake Mary	Lake Mary, FL	8.6	123	2013	Upscale
Westin Lake Mary, Orlando North	Lake Mary, FL	8.7	252	2016	Upper Upscale
Courtyard Orlando Lake Mary North	Lake Mary, FL	9.0	83	2011	Upscale
Hyatt Place Lake Mary/Orlando-North	Lake Mary, FL	9.0	128	2016	Upscale
Embassy Suites by Hilton Orlando North	Altamonte Springs, FL	12.2	277	2012	Upper Upscale
Hilton Orlando Altamonte Springs	Altamonte Springs, FL	13.4	309	2018	Upper Upscale
Total / Average	11 hotels		1,940	2012	

Source: CoStar, Smith Travel Research



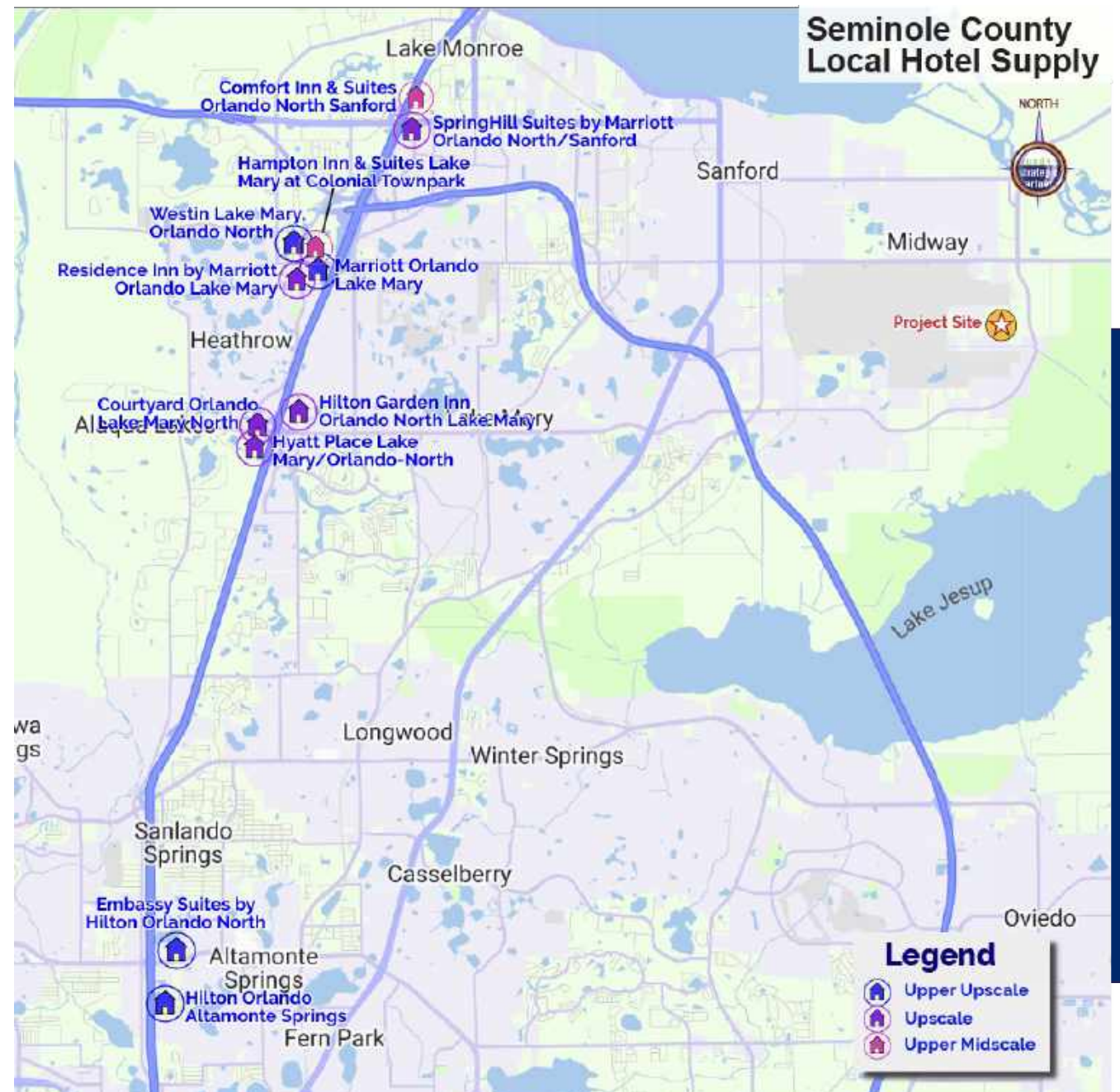
# Local Hotel Supply Map

The adjacent map details the local hotel supply within 15 miles from the Project.

In order to accomplish tournament functionality, it is important for major youth sports developments, such as the Project, to have an adequate supply of nearby hotel rooms. Adequate hotel clusters help facilitate the site selection process for tournaments that span across multiple days.

The largest clusters of relevant hotel properties are located off of I-4 in Lake Mary and offer a mix of hotel options that range from Upper Midscale to Upper Upscale.

The following section details the hotel performance within the competitive set.



# Competitive Set Performance

HSP pulled data from Smith Travel Research (STR) to understand the performance of the competitive set from January 2014 through October 2022. The local competitive set generally has been performing well over the eight-year period. From 2014 to 2019, ADR had been steadily increasing occupancy levels varying but overall stable. However, there has been minimal additional supply introduced to the market since 2014. The market began to recover in 2021 and 2022 with the highest ADR levels seen in 2022, but the overall performance has yet to fully recover to pre-pandemic levels.

Historical Supply, Demand, Occupancy, ADR, and RevPar for Competitive Hotels   Seminole County, FL											
Year	Annual Avg. Available Rooms	Available Room Nights	% Change	Room Nights Sold	% Change	% Occupancy	% Change	ADR	% Change	RevPar	% Change
2014	1,939	707,735	--	511,984	--	72.3	--	\$99.87	--	\$72.25	--
2015	1,939	707,735	0.0%	528,370	3.2%	74.7	3.2%	\$106.65	6.8%	\$79.62	10.2%
2016	1,939	707,735	0.0%	533,741	1.0%	75.4	1.0%	\$113.28	6.2%	\$85.43	7.3%
2017	1,939	707,735	0.0%	560,703	5.1%	79.2	5.1%	\$118.20	4.3%	\$93.65	9.6%
2018	1,937	707,005	-0.1%	548,665	-2.1%	77.6	-2.0%	\$124.56	5.4%	\$96.66	3.2%
2019	1,940	708,100	0.2%	544,434	-0.8%	76.9	-0.9%	\$127.31	2.2%	\$97.89	1.3%
2020	1,914	698,583	-1.3%	277,133	-49.1%	39.7	-48.4%	\$118.13	-7.2%	\$46.86	-52.1%
2021	1,940	708,100	1.4%	409,825	47.9%	57.9	45.9%	\$113.29	-4.1%	\$65.57	39.9%
2022 YTD (Oct.)	1,940	589,760	0.0%	406,634	21.6%	68.9	21.6%	\$131.69	17.3%	\$81.70	42.5%

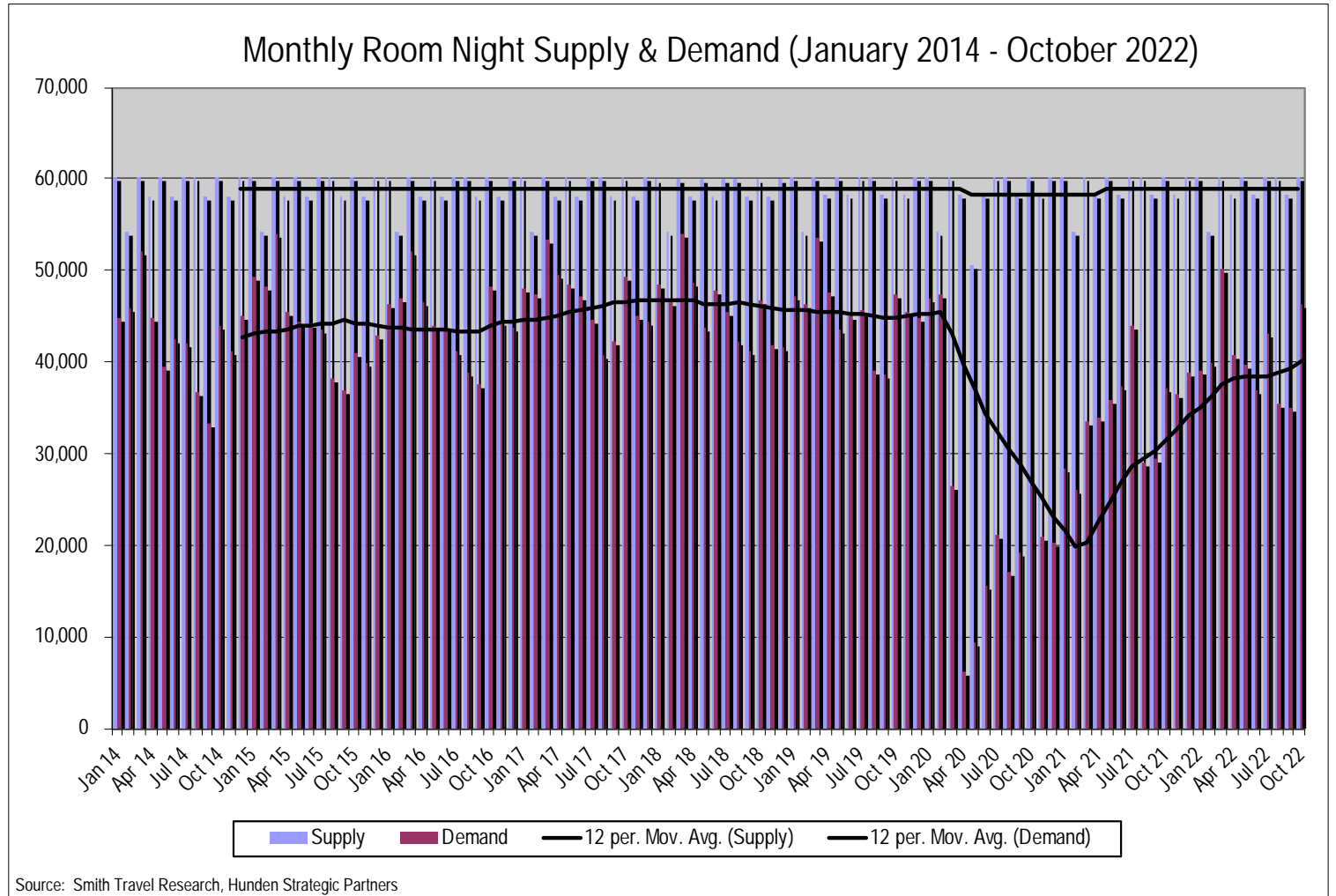
Source: Smith Travel Research, Hunden Strategic Partners

# Supply & Demand

The supply of room nights in the local competitive set has remained constant leading up to the COVID-19 pandemic due to the lack of new product. Once the pandemic occurred in March 2020, hotels began to shut down, which shows the decrease in available supply.

Hotel room demand shows slight seasonal trends with late summer months such as July and August experiencing significantly lower demand than the rest of the year given the extreme heat. Florida's seasonality differs given the climate.

Demand followed a pattern until 2020 and has remained steady with supply, however, the lack of additional supply in the local area suggests a challenged market. Demand has begun to recover but has not quite reached pre-pandemic levels.





# Heat Chart

## ADR & Occupancy

The adjacent tables detail the weekly performance of the local competitive set by month from November 2021 through October 2022.

As shown, both rate and occupancy increase towards the weekends and shoulder season months, both times where leisure travelers tend to go on vacation in the area. Throughout the year, Fridays and Saturdays consistently recorded the highest average daily rate and strongest occupancy levels. However, during peak months, weekdays recorded strong occupancy with competitive ADR levels. In 2022, March proved to be the most successful month for the competitive supply which is also a time that meetings and events pick up in the area in addition to spring break travelers.

ADR by Day of Week by Month - November 2021 - October 2022

	Sunday	Monday	Tuesday	Wednesday	Thursday	Friday	Saturday	Avg
Nov - 21	\$106	\$111	\$115	\$114	\$116	\$129	\$129	\$119
Dec - 21	\$106	\$111	\$117	\$117	\$113	\$123	\$123	\$117
Jan - 22	\$121	\$117	\$124	\$123	\$131	\$138	\$137	\$128
Feb - 22	\$133	\$124	\$128	\$129	\$131	\$148	\$151	\$136
Mar - 22	\$127	\$135	\$137	\$138	\$136	\$154	\$158	\$141
Apr - 22	\$121	\$126	\$131	\$131	\$125	\$138	\$145	\$133
May - 22	\$124	\$131	\$131	\$132	\$128	\$140	\$144	\$133
Jun - 22	\$122	\$130	\$133	\$129	\$126	\$134	\$133	\$130
Jul - 22	\$124	\$128	\$133	\$133	\$129	\$129	\$130	\$130
Aug - 22	\$112	\$117	\$120	\$118	\$115	\$115	\$117	\$117
Sep - 22	\$116	\$120	\$126	\$126	\$126	\$129	\$123	\$124
Oct - 22	\$126	\$131	\$139	\$137	\$132	\$145	\$149	\$138
Average	\$120	\$124	\$128	\$127	\$126	\$135	\$137	

Sources: Smith Travel Research

Occupancy Percent by Day of Week by Month - November 2021 - October 2022

	Sunday	Monday	Tuesday	Wednesday	Thursday	Friday	Saturday	Avg
Nov - 21	42.4%	49.7%	57.0%	59.5%	67.7%	84.9%	82.2%	62.7%
Dec - 21	48.4%	57.5%	60.7%	61.4%	61.9%	77.8%	82.3%	64.5%
Jan - 22	51.7%	49.0%	58.2%	61.6%	72.8%	83.4%	81.5%	65.0%
Feb - 22	61.5%	62.0%	72.5%	75.1%	73.2%	83.7%	86.5%	73.5%
Mar - 22	66.2%	79.6%	82.3%	83.1%	79.2%	96.7%	98.3%	83.4%
Apr - 22	44.9%	60.7%	72.8%	73.5%	64.5%	80.8%	86.1%	70.0%
May - 22	49.4%	56.5%	65.1%	72.4%	63.4%	74.3%	86.9%	65.9%
Jun - 22	47.8%	58.1%	67.4%	62.1%	59.8%	74.5%	76.7%	63.6%
Jul - 22	59.5%	63.7%	75.7%	80.3%	77.0%	73.0%	75.6%	71.8%
Aug - 22	40.3%	54.0%	61.2%	61.3%	60.6%	65.5%	68.9%	58.8%
Sep - 22	43.1%	47.5%	61.0%	65.2%	59.3%	72.3%	70.8%	60.3%
Oct - 22	55.2%	68.1%	83.9%	84.6%	79.1%	86.3%	87.7%	77.1%
Average	51.1%	58.5%	68.0%	69.8%	68.0%	79.2%	82.0%	

Sources: Smith Travel Research

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# Hotel Market Implications

HSP analyzed the current hospitality market conditions in the area and how a potential sports facility development would perform and complement the hotel market. Key takeaways are as follows:

- There is currently an adequate supply of hotel rooms to meet current demand, however, most of the hotel supply that visitors stay at are more than five miles from the Project. There is a limited amount of full-service hotels in the area with no new supply additions delivered in recent years.
- Youth sports has been a big demand driver in the spring, summer and fall months. Leisure travel is also at its highest in the spring months.
- Youth sports teams look for properties with significant double queen rooms at an affordable price.
- An indoor sports component would help increase occupancy in the slower months and would generate greater economic impact for the area. Additional hotel developments surrounding the Project would be ideal for attracting national tournaments.





# Retail & Restaurant Market Analysis



# Retail & Restaurant Supply



The major restaurant and retail clusters closest to the Project are located in downtown Sanford, Lake Mary and along Highway 17-92.

With the airport proximity, most food establishments near the Project are fast food offerings. Near the local hotel clusters, there is more of a variety of food offerings that accommodate larger groups. Retail & restaurant nodes are an important factor for sports as they provide youth sports participants and attendees with an array of offerings before and after sports practices and tournaments.

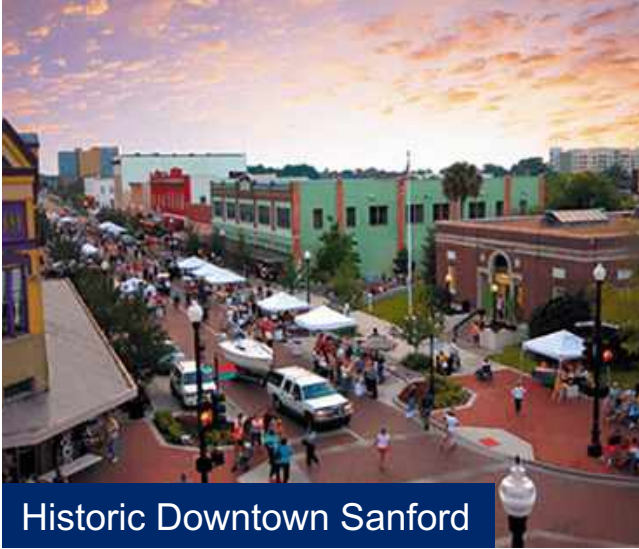
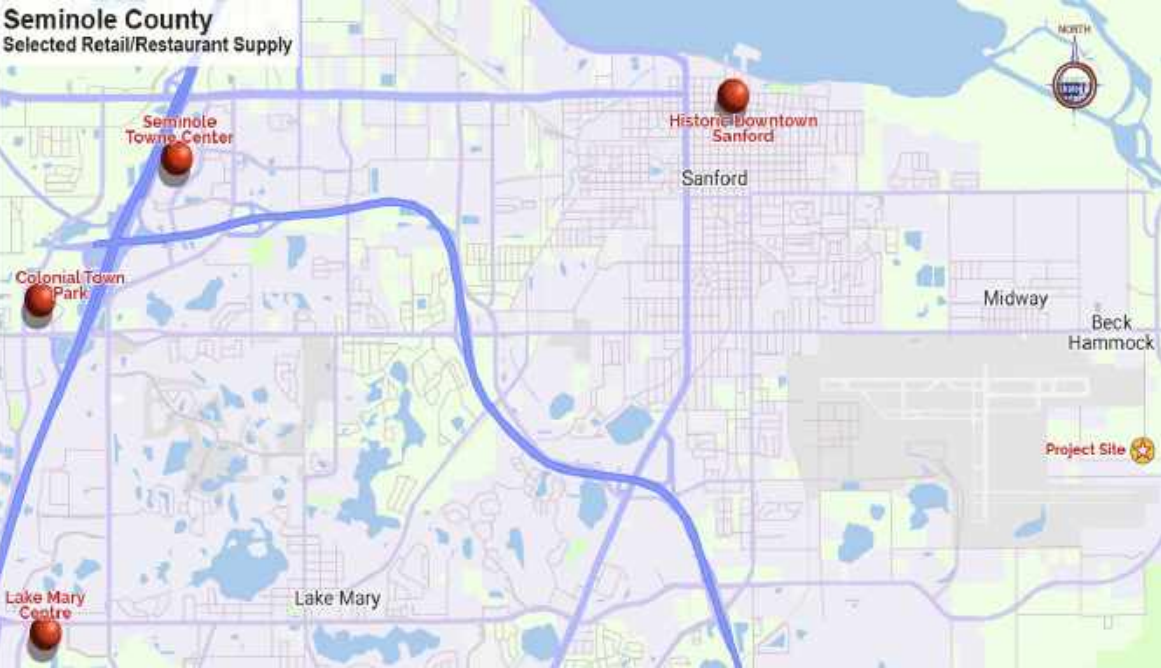
Seminole County promotes an extensive list of retail and restaurant options such as the Lake Mary Centre near the central business district. However, there is limited offerings for retail and restaurant within a five-mile radius of the Project. In order to support a large caliber of tournaments and attendees, additional support amenities should be introduced to the immediate area.





# Restaurant & Retail Supply

HSP selected a few retail & restaurant offerings to highlight as they are group-friendly and supportive of the Project.



Historic Downtown Sanford



Lake Mary Centre



Colonial Town Park



Seminole Towne Center

# Retail & Restaurant Market Implications

The following implications were drawn from HSP's retail and restaurant analysis:

- A cluster of retailers and restaurants creates critical mass, which makes a location more favorable to live and play.
- Retail & restaurant nodes are an important factor for sports as they provide youth sports participants and attendees with an array of offerings before and after sports practices and tournaments.
- Seminole County has some clusters of restaurant and retail, however, there is no significant commercial development surrounding the Project.
- A major youth sports development will facilitate future growth in retail and restaurant offerings closer to the Project. Currently, there is a limited supply that is catered toward group-friendly business, however, increased visitation to the area provided by the Project would result in higher demand for commercial development near the site.







# 09

## Benchmark Facilities

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# Case Study Facilities

**HSP analyzed several facilities to help form implications and recommendations for Seminole County.**

Through interviews and past projects, HSP evaluated various facilities across the country for performance history, programming, costs, funding and key takeaways for the Project. The following facilities are analyzed in the following chapter.

- Rock Hill Sports and Event Center
- LakePoint Champion Center
- Wintrust Sports Park
- UW Health Sports Factory
- Round Rock Sports Center



# Rock Hill Sports & Event Center

**Location:** Rock Hill, South Carolina

**Opened:** 2019

**Owner/Operator:** City of Rock Hill

**Cost:** \$25 Million

## Features:

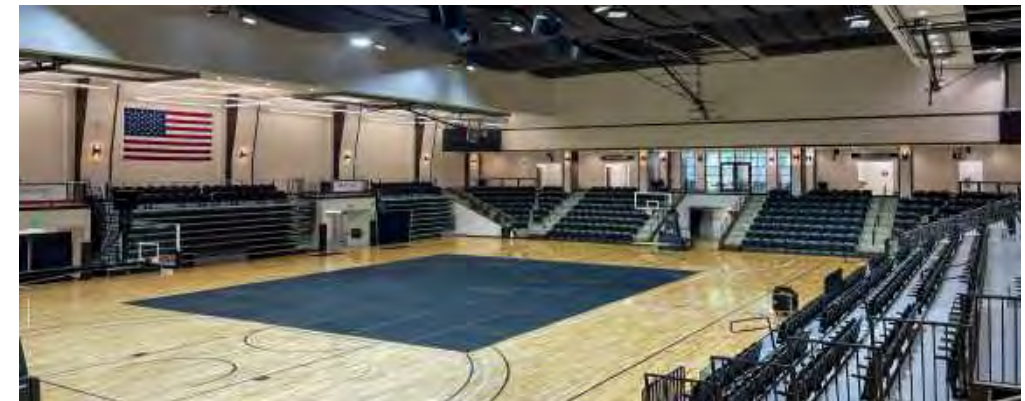
- 170,000 square feet
- 8 basketball courts (16 volleyball courts)
- 1 Championship Court (1,200 seats or convertible into 2 additional courts)

## Notes:

Rock Hill Sports and Events Center is located within a mixed-use district that connects Winthrop University and Downtown Rock Hill. According to VisitRockHill, the facility hosts leagues, tournaments, conferences and conventions, concerts and community events.

## Funding:

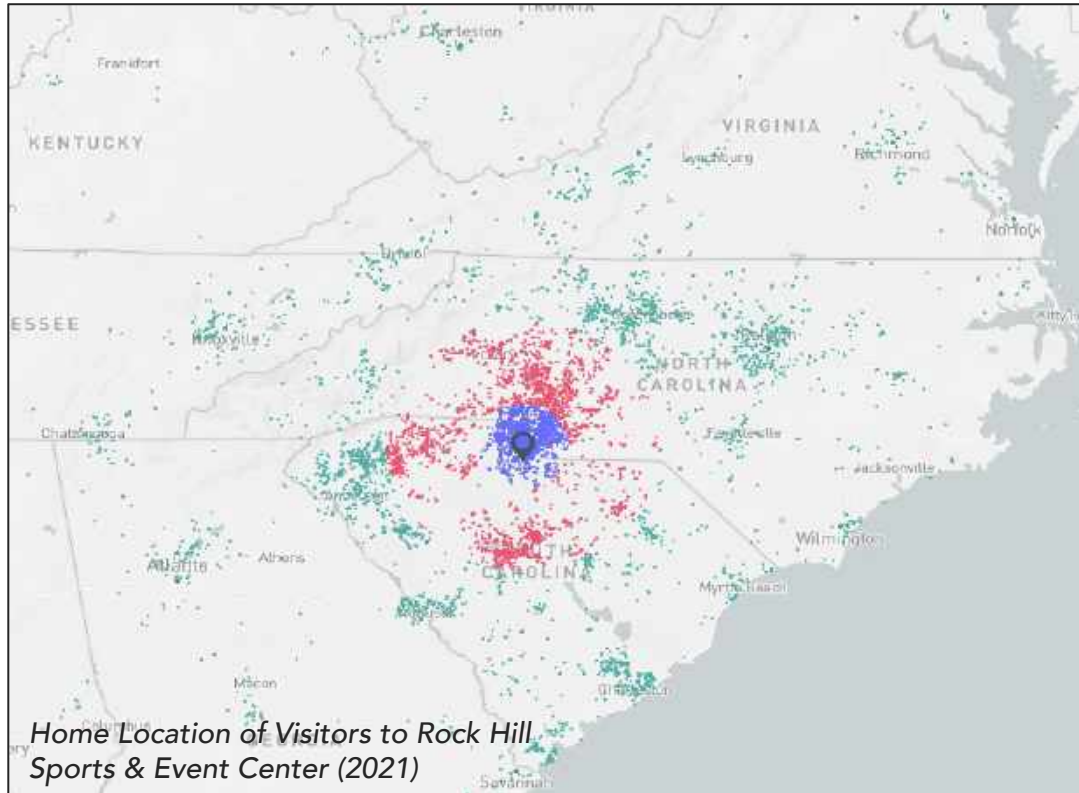
The City of Rock Hill issued a \$20.8 million tax-exempt bond and a \$485,000 taxable bond to fund the project.





# Rock Hill Sports & Event Center Visitation

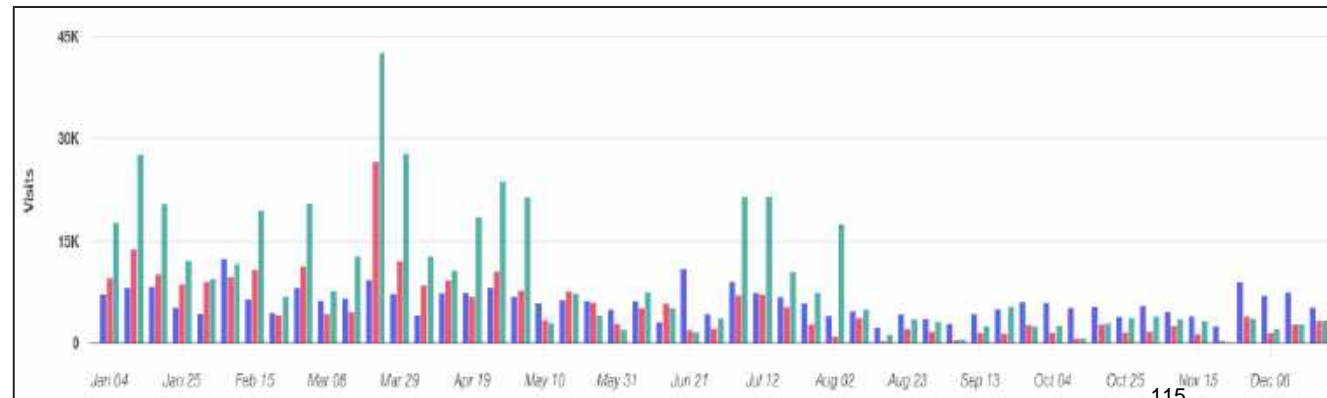
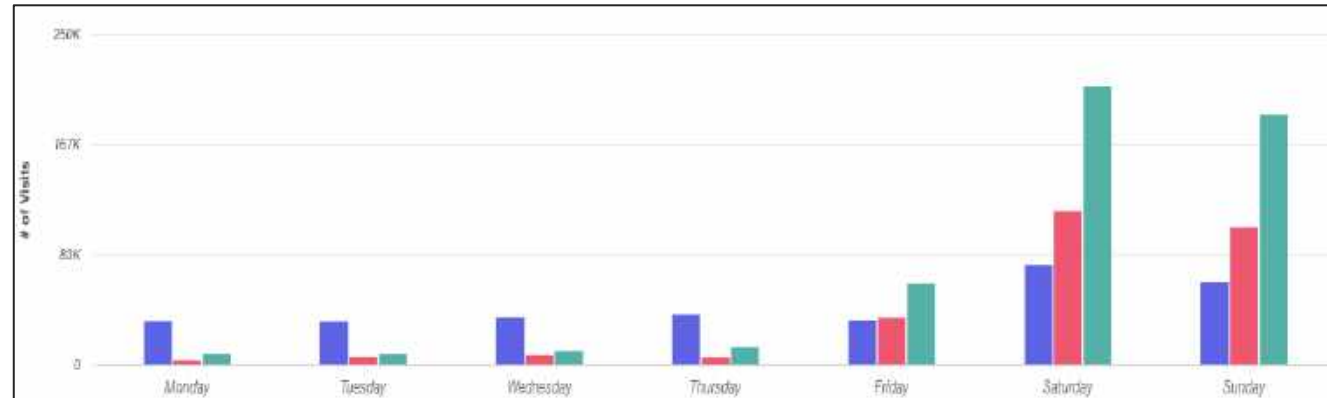
Rock Hill Sports & Event Center has been successful since its opening due to the variety of events the facility is able to host. The number of courts and the championship court has allowed the facility to host high-profile national tournaments and showcases. Nearly 50 percent of the facility's visitation came from beyond 75 miles in 2021.



Rock Hill Sports & Event Center - Rock Hill, SC  
January 2021 - December 2021

Visitor Origins by Distance from Site	Total Visits		Total Unique Customers		Avg. Visits per Customer
	Est. Number of Visits	Percent of Total Visits	Est. Number of Customers	Percent of Total Customers	
Locals - Within 25 miles	314,800	29%	70,700	25%	4.45
Regional Distance - Between 25 and 75 miles	280,600	26%	71,700	26%	3.91
Long Distance only - Over 75 miles	502,800	46%	138,400	49%	3.63
<b>Total Visits</b>	<b>1,098,200</b>	<b>100%</b>	<b>280,800</b>	<b>100%</b>	<b>3.91</b>

Source: Placer.ai



# LakePoint Champion Center

**Location:** Emerson, Georgia

**Opened:** 2016

**Owner/Operator:** Private

**Cost:** \$32 Million

**Features:**

- 170,000 square feet
- 12 basketball courts (24 volleyball courts)

**Notes:**

The LakePoint Champion Center is located on the 1,300-acre LakePoint Sports campus in Emerson, GA. The campus features on-site hotels, restaurants, retail, a waterpark and other entertainment.

HSP spoke with tournament operators that schedule events in Florida and Georgia. Operators conveyed that within a calendar year, there are not many tournaments that require twelve courts, and the size of the facility often feels overbuilt.

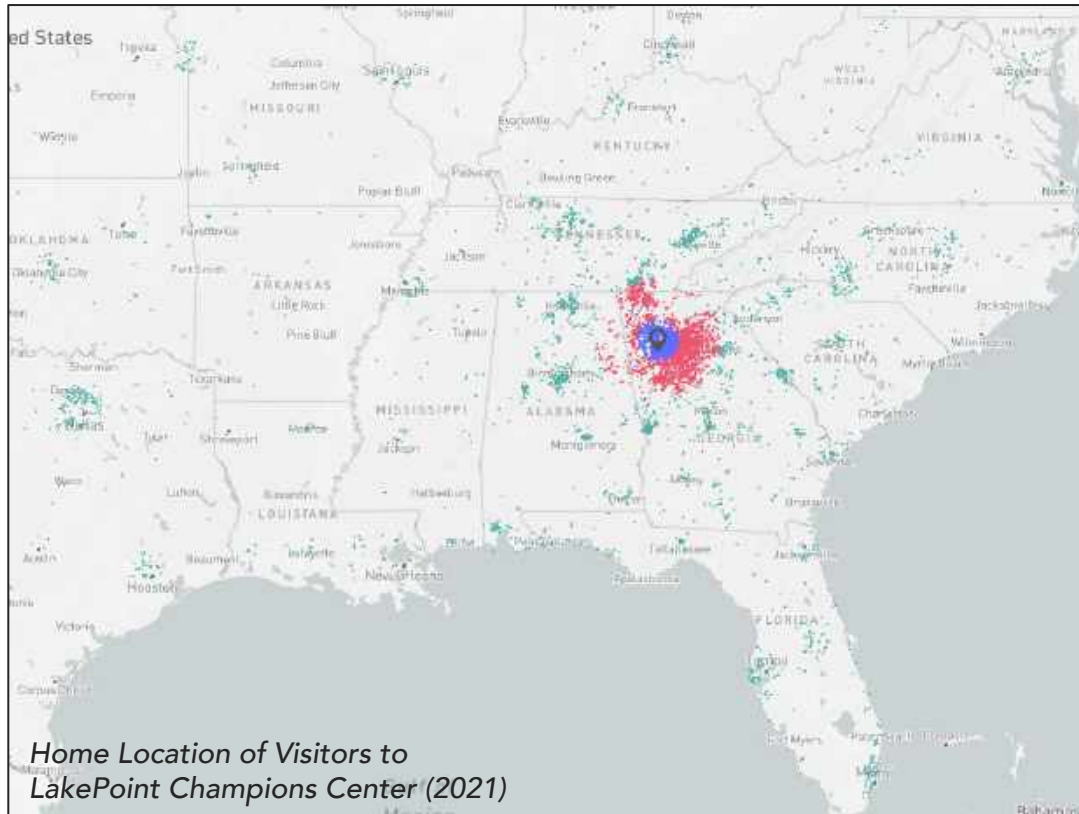
**Funding:**

LakePoint's indoor facility was built in a second phase and received a \$32 million bond from Bartow County.



# LakePoint Champion Center Visitation

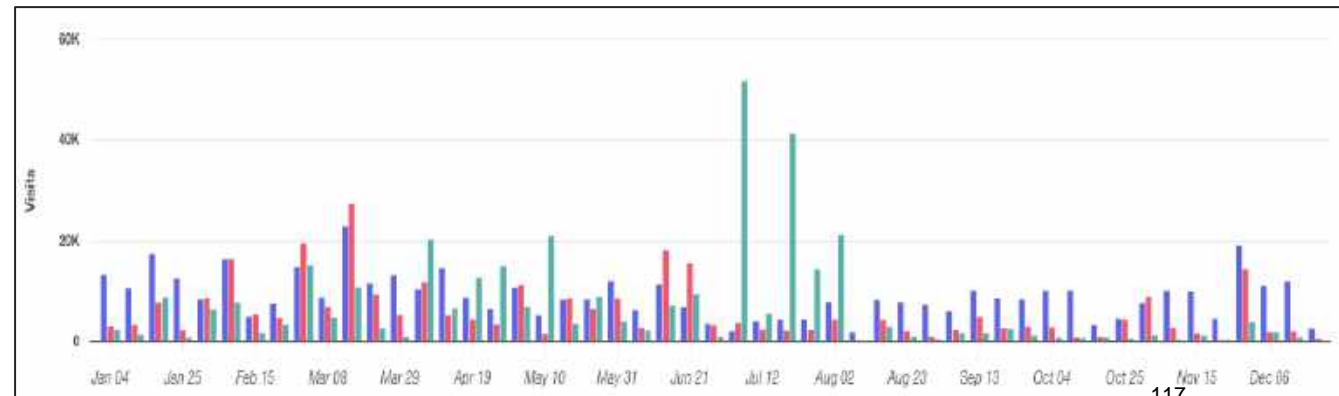
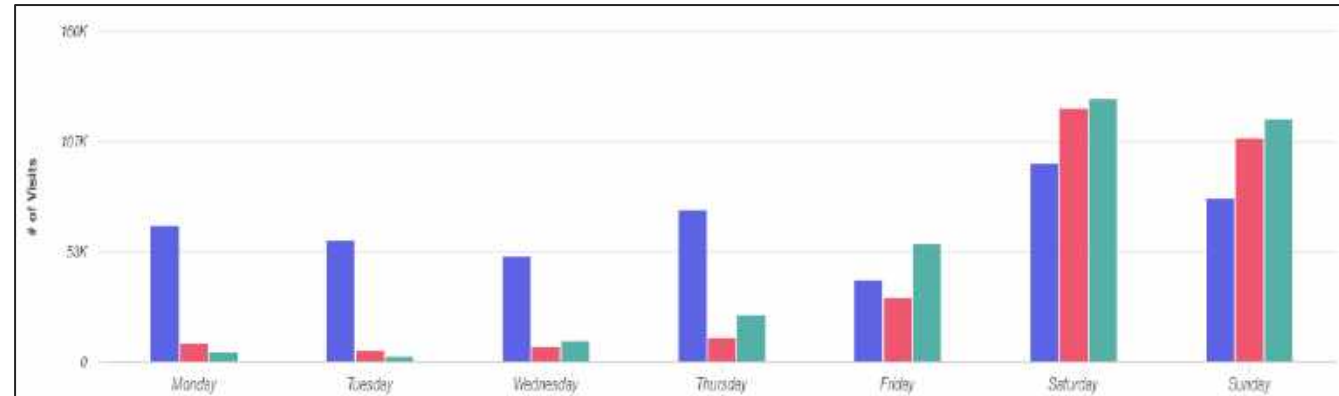
LakePoint Sports is one of the largest youth sports development sin the country, but visitation data was solely analyzed on the indoor component of the project. In 2021, the facility attracted over 1.1 million visitors, primarily from neighboring states, but had a major presence in the southern half of the country as a result of hosting basketball, volleyball, futsal, pickleball and other indoor tournaments.



LakePoint Champions Center - Emerson, GA  
January 2021 - December 2021

Visitor Origins by Distance from Site	Total Visits		Total Unique Customers		Avg. Visits per Customer
	Est. Number of Visits	Percent of Total Visits	Est. Number of Customers	Percent of Total Customers	
Locals - Within 25 miles	464,300	42%	126,000	31%	3.68
Regional Distance - Between 25 and 75 miles	296,000	27%	128,400	32%	2.31
Long Distance only - Over 75 miles	343,100	31%	149,300	37%	2.30
Total Visits	1,103,400	100%	403,700	100%	2.73

Source: Placer.ai





# Wintrust Sports Park

**Location:** Bedford Park, Illinois

**Opened:** 2021

**Owner:** Village of Bedford Park

**Operator:** Sports Facilities Companies

**Cost:** \$32 Million

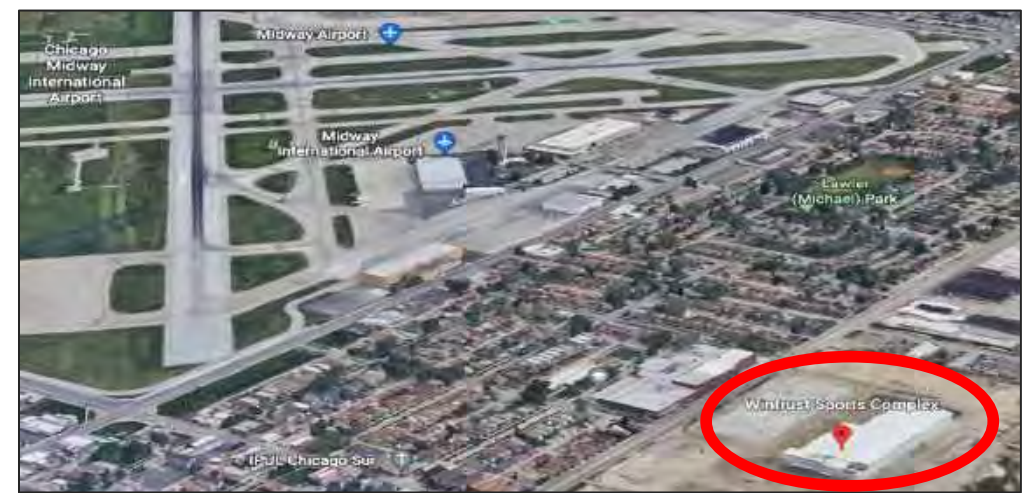
## Features:

- 116,000 square feet
- 8 basketball courts (16 volleyball courts)
- 1 Championship Court
- Arcade, Laser Tag, E-Sports Gaming Room
- Meeting & Event Space
- Bar and Lounge with Full Kitchen

## Notes:

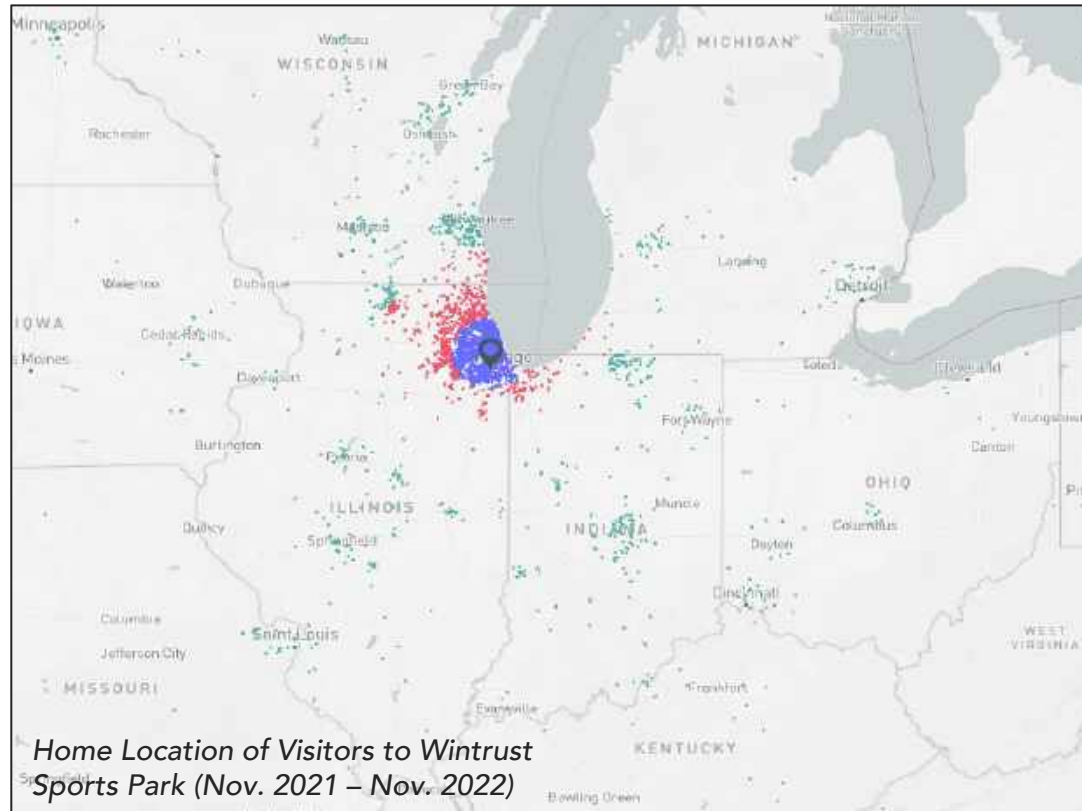
Wintrust Sports Park is Chicago's newest youth sports facility. Wintrust is strictly an indoor facility equipped with ample court space and amenities for large scale tournaments as well as an e-sports room to host competitive matches.

The facility is located less than a mile from Chicago Midway International Airport.



# Wintrust Sports Park Visitation

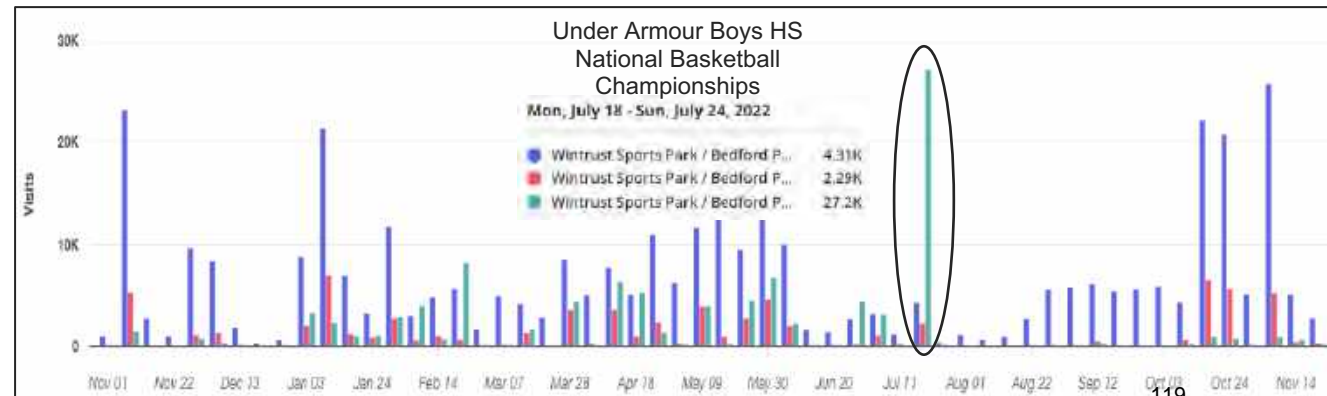
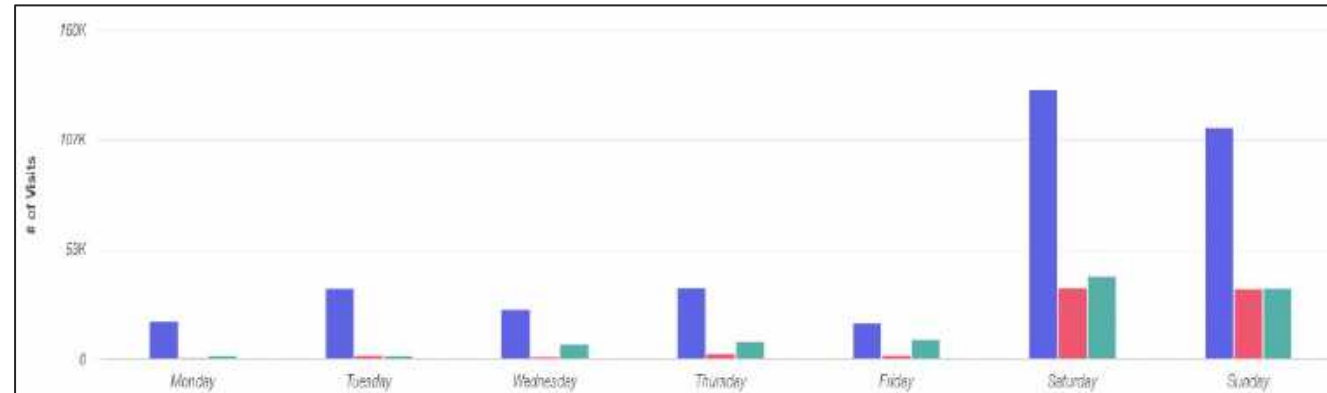
Since opening in September 2021, Wintrust Sports Park has emerged as a hotspot within the Chicago MSA for hosting regional and national tournaments. SFC works with multiple tournament operators to host events throughout the year at the facility.



Wintrust Sports Park - Bedford Park, IL  
November 2021 - November 2022

Visitor Origins by Distance from Site	Total Visits		Total Unique Customers		Avg. Visits per Customer
	Est. Number of Visits	Percent of Total Visits	Est. Number of Customers	Percent of Total Customers	
Locals - Within 25 miles	372,500	67%	132,000	62%	2.82
Regional Distance - Between 25 and 75 miles	77,500	14%	34,100	16%	2.27
Long Distance only - Over 75 miles	103,800	19%	47,500	22%	2.19
Total Visits	553,800	100%	213,600	100%	2.59

Source: Placer.ai





# UW Health Sports Factory

**Location:** Rockford, IL

**Opened:** 2016

**Cost:** \$24.4 million

**Owner:** City of Rockford

**Operator:** Rockford Park District

## Sports Features:

- 96,000 square feet
- 8 basketball courts (16 volleyball courts)
- Seating for up to 3,700 spectators

## Additional Amenities:

- Events plaza
- Restaurant/bar
- Five meeting rooms

## Funding:

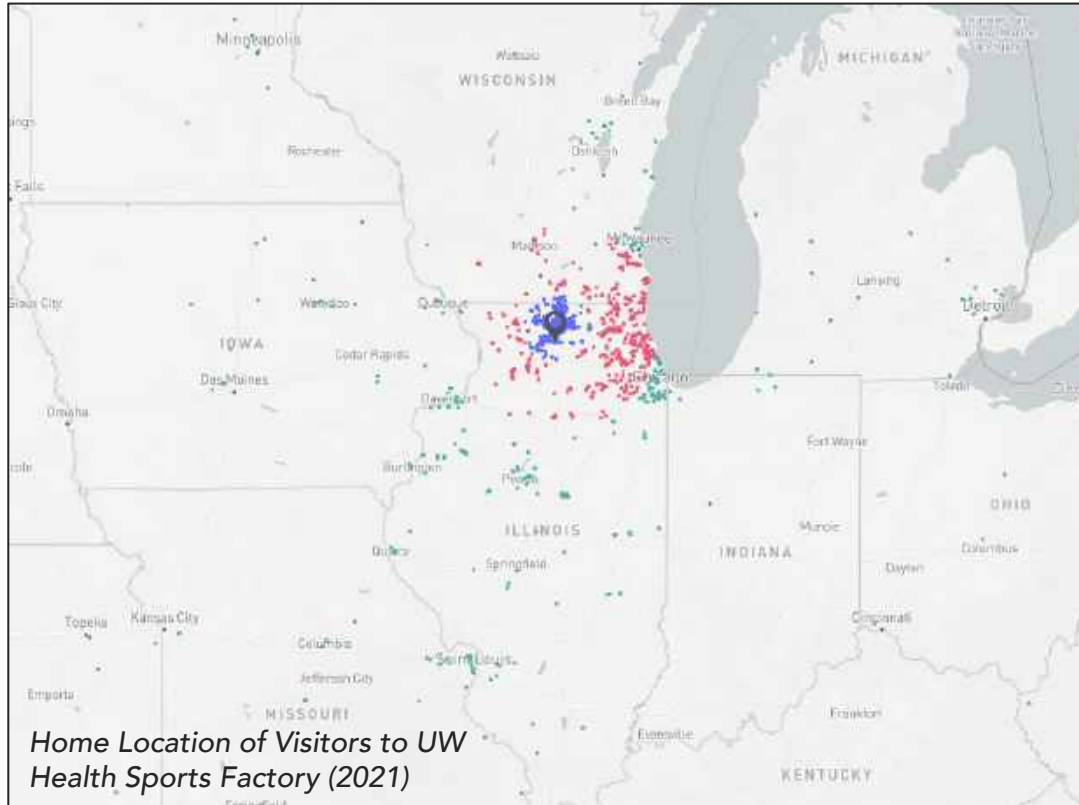
The facility was funded by the City of Rockford, the Rockford Park District, multiple grants and a two percent increase to the countywide hotel tax.





# UW Health Sports Factory Visitation

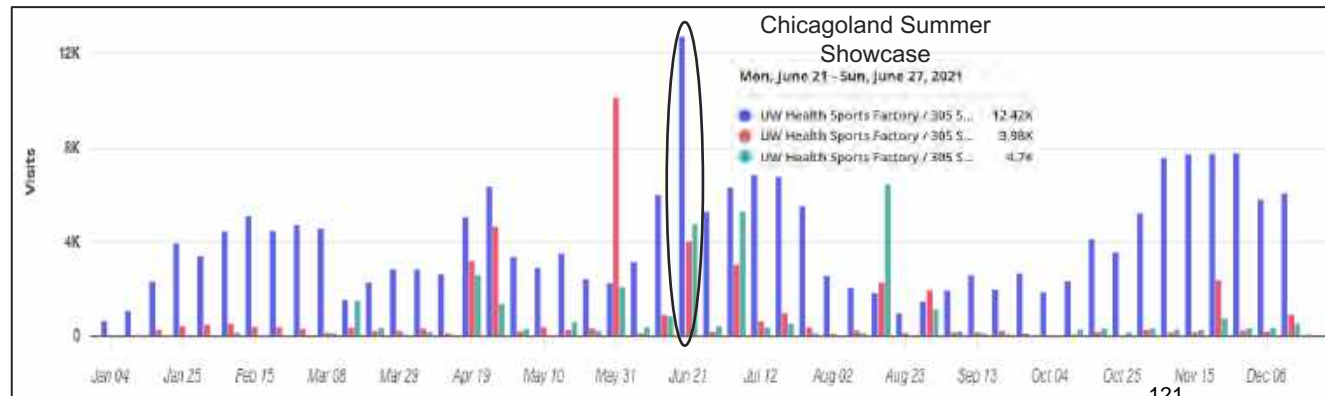
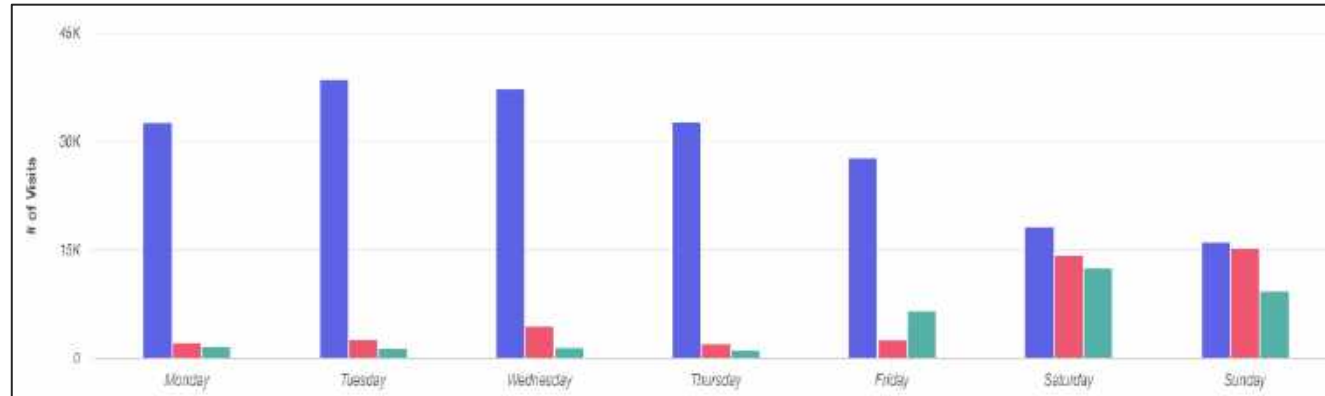
UW Health Sports Factory sees highly localized visitation, with the average visitor making over five trips to the facility throughout 2021. The facility is centrally located between Milwaukee, Madison, Chicago and other cities in Illinois and Iowa, making it a popular regional tournament destination.



UW Health Sports Factory - Rockford, IL  
January 2021 - December 2021

Visitor Origins by Distance from Site	Total Visits		Total Unique Customers		Avg. Visits per Customer
	Est. Number of Visits	Percent of Total Visits	Est. Number of Customers	Percent of Total Customers	
Locals - Within 25 miles	202,900	72%	38,300	50%	5.30
Regional Distance - Between 25 and 75 miles	43,100	15%	21,300	28%	2.02
Long Distance only - Over 75 miles	33,900	12%	16,400	22%	2.07
<b>Total Visits</b>	<b>279,900</b>	<b>100%</b>	<b>76,000</b>	<b>100%</b>	<b>3.68</b>

Source: Placer.ai



# Interview: UW Health Sports Park

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HSP interviewed representatives of UW Health Sports Park in Rockford, IL to understand the dynamic of their facility, the demand for space, and their regional draw for indoor tournaments. This interview indicated the following:

- The facility opened in 2016 with 8 full-sized basketball courts, which can accommodate 16 volleyball courts.
- The facility added pickleball lines on 4 courts, allowing for a maximum of 12 pickleball games being played at a time.
- It took the facility awhile to foster and build a strong base of tournament demand.
- There is a dead season at the end of July and into August where there is not a lot of basketball and volleyball demand.
- For the larger basketball/volleyball tournaments, the facility collaborates with the local schools and parks district.
- Basketball prime-time rental rates are \$60/hr, while non-prime-time is \$40/hr. or even \$20/hr.
- The rental rate for volleyball is typically \$30/hr.
- If they were to change one thing it would be to get a confirmed commitment from an anchor basketball and volleyball program before opening.
- The key is to stay flexible, with a diversity of activities going on to keep the facility filled and continual cash flows coming in.

# Round Rock Sports Center

**Location:** Round Rock, Texas

**Owner:** City of Round Rock

**Operator:** City of Round Rock, Sports Facilities Companies

The City of Round Rock has two premier sports complexes which are outlined below. Each of the facilities is within a 10-minute drive of one another:

- **Round Rock Sports Center:** 6 basketball/12 volleyball
- **Round Rock Multipurpose Complex & Old Settlers Park:** 10 soccer, 5 artificial (1 championship), 5 grass (1 championship), 25 diamonds (20 baseball, 5 softball)

**Funding:** In 2008, the City of Round Rock funded a \$18.2 million renovation and expansion of Old Settlers Park, which sparked the city's campaign as the "Sports Capital of Texas."

In 2012, The City of Round Rock issued \$7.8 million in bonds for the Round Rock Sports Center, which cost a total of \$14.5 million. The bonds are being paid back using a two-percent increase to the city's Hotel Occupancy Tax and the remaining cost of the facility was covered by the city's general fund.

In 2017, Old Settlers Park underwent a 6-acre, \$27 million expansion project that added the Round Rock Multipurpose Complex.

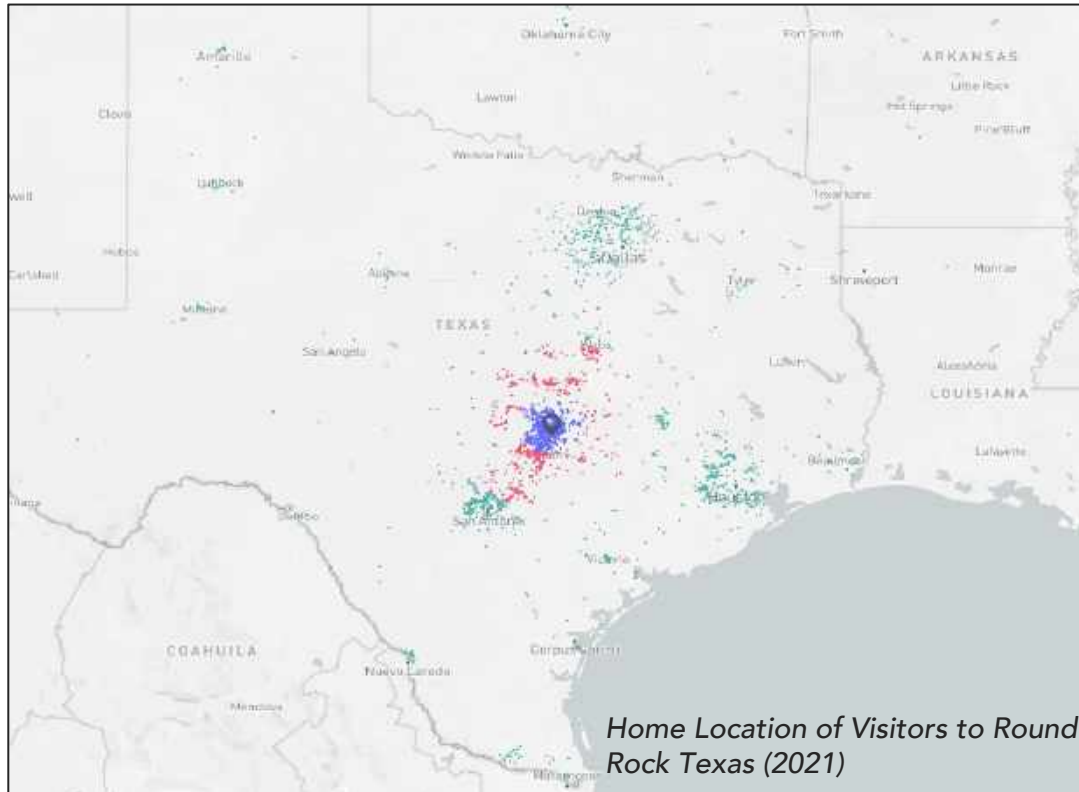




# Round Rock Texas

## Visitation

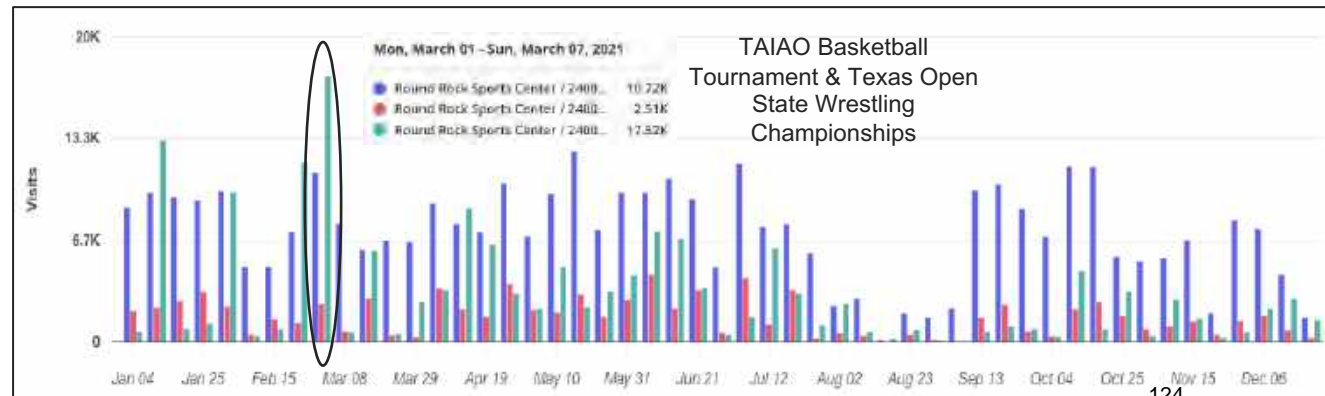
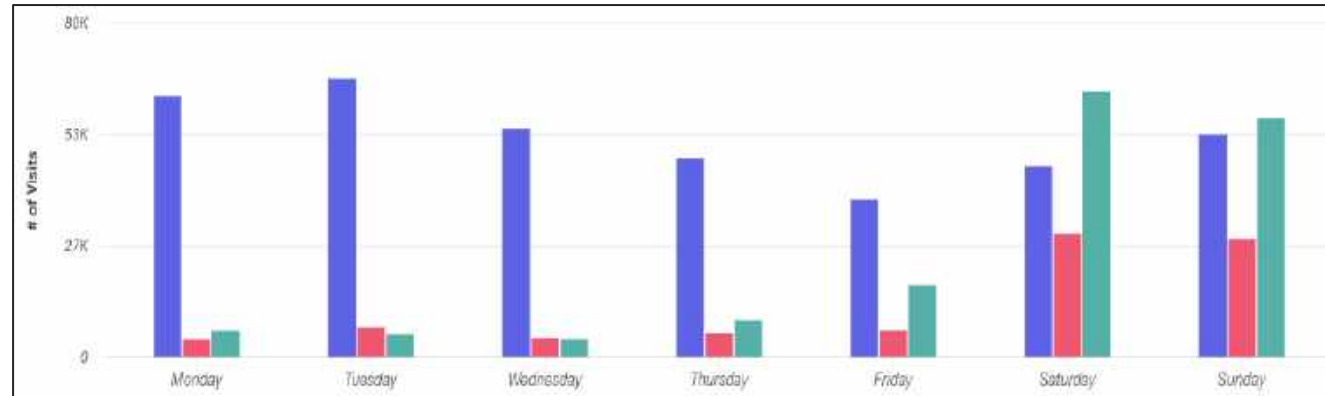
In 2021, Round Rock is located between many of Texas' major cities including Austin, Dallas, San Antonio and Houston and induced strong visitation across the state. The Sports Center is the city's indoor complex shows that a facility of the recommended size of the Project induces strong visitation for tournaments throughout the weekends during the year.



Round Rock Sports Center - Round Rock, TX  
January 2021 - December 2021

Visitor Origins by Distance from Site	Total Visits		Total Unique Customers		Avg. Visits per Customer
	Est. Number of Visits	Percent of Total Visits	Est. Number of Customers	Percent of Total Customers	
Locals - Within 25 miles	368,900	60%	58,100	41%	6.35
Regional Distance - Between 25 and 75 miles	86,700	14%	23,700	17%	3.66
Long Distance only - Over 75 miles	163,600	26%	60,800	43%	2.69
<b>Total Visits</b>	<b>619,200</b>	<b>100%</b>	<b>142,600</b>	<b>100%</b>	<b>4.34</b>

Source: Placer.ai



# Interview: City of Round Rock

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HSP interviewed management at Round Rock Sports Center to better understand the demand for sports in the area, the local supply of facilities and any potential gaps in the market. The interview indicated the following:

- Volleyball and basketball are the two major sports that occupy indoor court space for tournaments, practices and league games. Falling behind this is cheer, dance and other indoor sports such as futsal.
- A number of new facilities are in the planning stages in the greater Austin/San Antonio area due to the growth witnessed in the region in the past several years. It is important to build the facility or space to suit what the needs will be five or ten years into the future. Focusing on the uses of the facility rather than the space is a must.
- How the facility is managed is critical to its success. The Round Rock Sports Center is managed by the city and rented out to major tournament operators and teams in the area.

# Implications

- Major youth sports complexes primarily draw visitation from within their regions, but when they are programmed correctly, they attract attention from nation tournament operators.
- Interviews with tournament organizers and 2021 visitation data for Rock Hill and LakePoint reveal that with the 4 additional courts at LakePoint, there is no direct correlation with increased visitation.
- It is critical to form partnerships with organizations to keep the facility rented out consistently and receive a stable stream of cash flows.
- The feasibility and success of these complexes hinges on the organizational structure, whether it be privately funded, city owned and operated, or set up as a non-profit organization.
- Indoor facilities must be flexible, be open to a variety of event types and uses, and always be creative with branding and exposure.
- Support amenities for the families that are travelling to watch their children play are crucial, including food and beverage, entertainment, and hotels and accommodations.





# 10

## Implications & Recommendations

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# SWOT Analysis

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The following SWOT analysis details the strength, weaknesses, opportunities and threats related to the proposed youth sports facility in Seminole County, Florida.

## STRENGTHS



- Growing population and strong local/regional market.
- Central location in Florida and 35 miles from downtown Orlando.
- No major competitive indoor facilities within Seminole County.
- Proven success with Boombah Sports Complex.

## OPPORTUNITIES



- Tournament-grade indoor sports facility.
- Unobstructed function space that could serve as an emergency shelter for the County.
- Private sector partnerships with tournament operators.
- Additional commercial development surrounding the airport and sport complexes.

## WEAKNESSES



- Limited full-service hotels in the County and no hotels within 5 miles of the Project site.
- Lack of development around the proposed Project.
- Losing tourism dollars to Orange County and the Orlando market.

## THREATS



- Other proposed, competing facilities within the Florida market.
- Private indoor facilities in neighboring counties and similar destination cities.
- Competing interests between club and recreational usage given the rapid residential growth.



# How to Capitalize on Strengths & Mitigate Weaknesses



The following key headlines outline ways Seminole County can both leverage their strengths and mitigate some of their weaknesses with the proposed youth sports complex.

## Strong Local/Regional Demand

Youth sports continue to grow in the area as the residential population continues to increase. Indoor clubs and tournament operators have expressed that the lack available court supply has restricted growth of their programs and limits tournament sizes. Seminole County and the greater Orlando market have a strong demand base that can fill court space throughout the week within a large sports complex and draw tournaments on the weekends.

## Weak Supply Within Florida

A high-quality indoor facility with ample court space for tournaments is in need for Central Florida. The majority of the large tournaments are held at the Convention Center with the remainder split between a handful of facilities. The local and regional supply is extremely limited for the demand and population of the state. A regional facility in Seminole County would recapture demand that currently leaves the market for tournaments and induce tournament visitation from all over the country.

## Destination Appeal

Seminole County has the ability to leverage its geographical location between the biggest theme parks found in Orlando and beaches on the east coastline. A new indoor sports facility will add to the youth sports destination that Boombah has started and give Seminole County a competitive advantage when appealing to tournament operators. A youth sports destination that is also close to well-known family entertainment will enhance its attractiveness for larger regional and national tournaments.



# Headlines – Seminole County Youth Sports

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The following bullets summarize the key findings and headlines. In order to assess the viability of any project and make informed recommendations, there are key elements that must be considered.

- **Facility and Site Needs.** General site parameters for a successful youth sports facility include availability of land for current and potential future development, accessibility, proximity to hotel/restaurant nodes and flat topography. Roughly 15-20 acres are typically needed for an indoor facility, depending on future expansion and parking. In order to appeal to tournament operators, it is ideal that an indoor facility has onsite amenities that can accommodate spectators and teams in their down time.
- **Support Amenities.** Nearby hotel and restaurant nodes not only help the local area but also serve as a selling point for larger tournaments that will ultimately attract overnight visitors. The industry is driving spending and overnight stays for all types of municipalities around the country. While many industries that fall under the tourism umbrella were hurt by the COVID-19 pandemic, the youth sports industry has stayed consistent in terms of driving economic impact for municipalities.
- **The Supply & Demand.** There is significant demand for indoor space in the greater Orlando area. Currently all major tournaments are being held at a select few facilities aside from the Orange County Convention Center. However, given the Convention Center's popularity among conventions and meetings on a national basis, there is a limited number of weekends available for youth sports tournaments. Local facilities claim that a lot of their major tournaments come from turned away business from the Convention Center and ESPN, which still can not be fully accommodated with the current local supply.
- **Case Studies.** Flexibility is a major ingredient to the success of youth sports developments. The ability to host a diverse mix of sporting events, and potentially non-sporting events will enhance the chances of a facility's success. Key on-site amenities that complement a major youth sports complex include food and beverage offerings, lounge/play areas for participants and fans, community space and physical therapy/sports performance space.

# Recommendations

The adjacent table details the recommended programming for the Project. Based on the analysis of the youth sports market in the greater Orlando area, the region and interviews with market experts, tournament organizers and other stakeholders, HSP recommends 9 hardwood basketball courts with the ability to configure into 18 volleyball courts. Included in the nine-court recommendation is a championship style court that has retractable seating for spectators. The championship court would be separated from the remaining courts to enhance the exclusivity factor. This would be a unique asset that is not currently found in the local supply and would help to attract national tournaments of a higher caliber.

Onsite amenities are the key to success for the longevity of this facility to become an established tournament destination. This will also help the facility’s ability to host non-sports related events when needed.

Seminole County Indoor Sports Facility Recommendations		
Feature	Unit	Unit Size
Recommendation		
Indoor Courts (Hardwood)	Courts	
Basketball	Courts	9
Volleyball	Courts	18
Seating (Minimum)		900
Minimum Parking		900
<i>Other Key Amenities:</i>		<i>Building Needs:</i>
Concession/Food Service Area		Team/Changing Rooms
Restaurant/Café		Ample Parking
Stage		Offices
Play Area/Lounge Space		Public Restrooms
Performance/Physical Therapy Area		Storage
Meeting Rooms		First Aid Station
Lobby Space		
Source: HSP, Convergence Design		

**LEGEND:**

- 1 Development Site
- 2 Overflow Parking
- 3 Parking
- 4 Play
- 5 Indoor Sports Facility
- 6 Detention



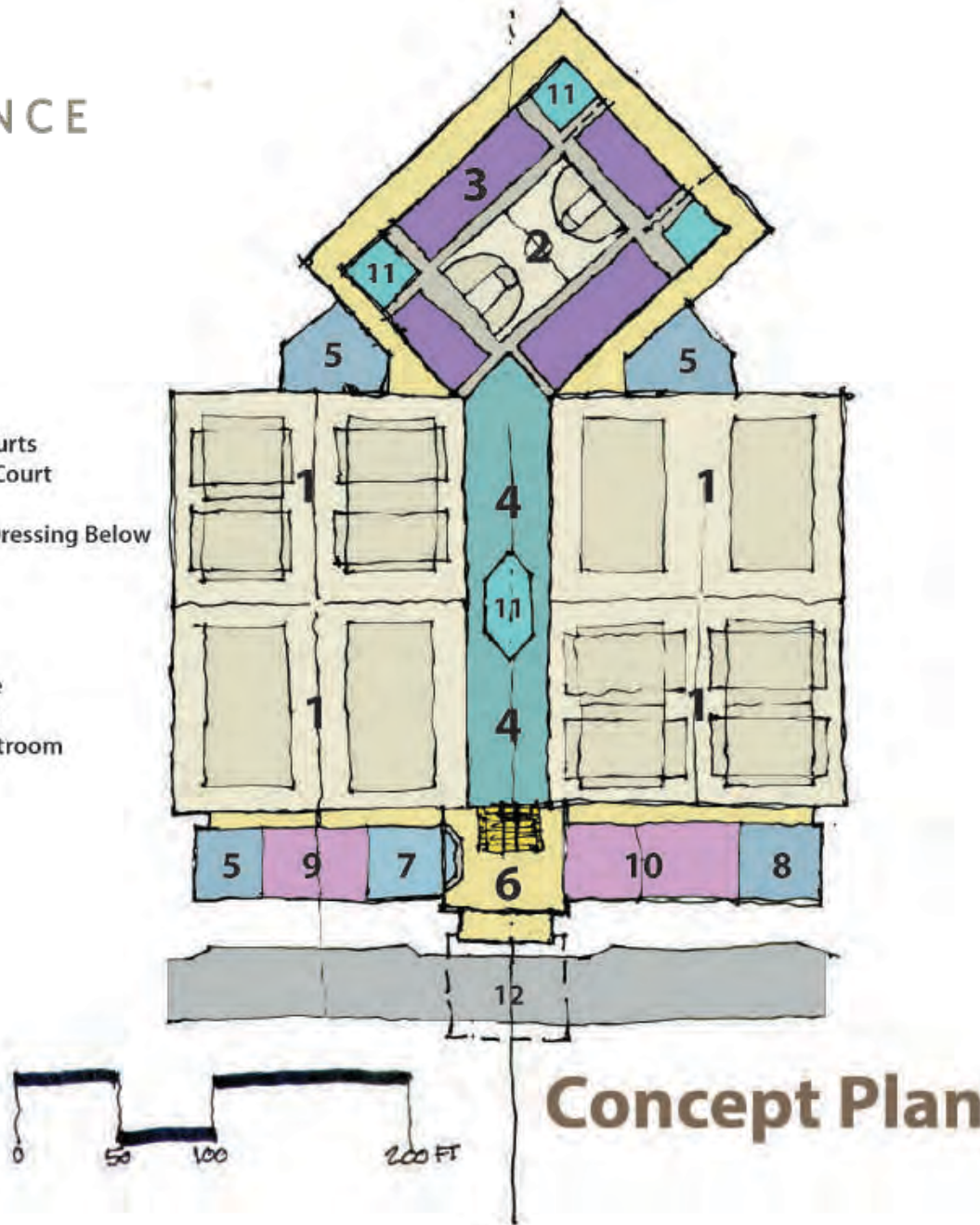
**Concept Site Plan**



**Seminole County Indoor Sports Facility**



- LEGEND:**
- 1 Tournament Courts
  - 2 Championship Court
  - 3 Seating
  - 4 Dining Above/Dressing Below
  - 5 Mech./Storage
  - 6 Lobby
  - 7 Admin/Retail
  - 8 Childcare
  - 9 Sports Medicine
  - 10 Meeting Rooms
  - 11 Concession/Restroom
  - 12 Drop Off Drive



## Concept Plan

### Cost Estimates - Seminole County Indoor Sports Facility

Building	Construction Cost	Soft Cost	Project Cost
Upper Level	\$3,200,000	\$800,000	\$4,000,000
Main Level	\$44,600,000	\$11,200,000	\$55,800,000
<b>Total Building</b>	<b>\$47,800,000</b>	<b>\$12,000,000</b>	<b>\$59,700,000</b>
Sitework	Construction Cost	Soft Cost	Project Cost
Parking	\$1,400,000	\$400,000	\$1,800,000
Landscaping	\$900,000	\$300,000	\$1,100,000
Other Sitework	\$300,000	\$100,000	\$400,000
<b>Total Sitework</b>	<b>\$2,500,000</b>	<b>\$300,000</b>	<b>\$1,400,000</b>
<b>Total Building &amp; Site</b>	<b>\$50,300,000</b>	<b>\$12,300,000</b>	<b>\$61,100,000</b>

Source: Convergence Design

#### Soft Costs

Fees, Testing	9%
Fixtures, Furnishings	6%
Contingency	10%
<b>Total Soft Costs</b>	<b>25%</b>

# Next Steps


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**Feedback & Edits**

**Pro Forma**

**Economic, Fiscal and Employment Impact Analysis**



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- Real Estate Market & Financial Feasibility
- Economic, Fiscal & Employment Impact Analysis (Cost/Benefit)
- Organizational Development
- Public Incentive Analysis
- Economic and Tourism Policy/Legislation Consulting
- Research & Statistical Analysis
- Developer Solicitation & Selection

The firm and its principal have performed more than 750 studies over the past 20 years, with more than \$5.5 billion in built, successful projects.





# **Economic, Demographic and Tourism Analysis**

# Employment

Seminole County has a limited, yet growing employment base that spans across several different industries.

- The top industries by employment in Seminole County are retail trade, professional, scientific, and technical services and finance and insurance.
- Lake Mary offers a high-tech corridor that is growing within Seminole County that is home to major companies in the professional services and finance industries.

A strong employment base provides options for potential corporate events and smaller meeting types in addition to potential sponsorship opportunities. An established workforce enhances the overall quality of life in an area.

Seminole County Employment by Industry - 2021

Description	Employees	Percentage of Total
Total employment (number of jobs)	299,981	100%
By type		
Wage and salary employment	219,404	73.14%
Proprietors employment	80,577	26.86%
By industry		
Nonfarm employment	299,650	99.89%
Farm employment	331	0.11%
Private nonfarm employment	282,272	94.10%
Retail trade	33,592	11.20%
Professional, scientific, and technical services	30,458	10.15%
Finance and insurance	28,187	9.40%
Construction	27,672	9.22%
Administrative and support and waste management and remediation services	27,150	9.05%
Health care and social assistance	26,853	8.95%
Accommodation and food services	18,995	6.33%
Other services (except government and government enterprises)	17,896	5.97%
Real estate and rental and leasing	17,885	5.96%
Transportation and warehousing	11,404	3.80%
Manufacturing	8,772	2.92%
Wholesale trade	8,734	2.91%
Information	7,656	2.55%
Arts, entertainment, and recreation	5,840	1.95%
Educational services	5,503	1.83%
Management of companies and enterprises	4,438	1.48%
Utilities	842	0.28%
Forestry, fishing, and related activities	238	0.08%
Mining, quarrying, and oil and gas extraction	157	0.05%
State and local	15,491	5.16%
Local government	13,092	4.36%
State government	2,399	0.80%
Military	838	0.28%

Source: Bureau of Economic Analysis

# Top Employers

As of 2021, the top three employers in Seminole County are Concentrix CVG Corporation (Convergys), JP Morgan Chase Bankcard Services, and Deloitte Consulting.

- The top 15 employers in the area employ nearly 16,900 total employees. As Central Florida continues to grow, employment is expected to increase in the area.
- Seminole County is growing with an increased interest in technology and financial services as Orlando continues to build out its urban core and activate suburban markets.

Ranking	Company Name	Industry	Employee Range
1	Concentrix CVG Corporation (Convergys)	Information Management	1,900
2	JP Morgan Chase Bankcard Services	Financial Services	1,900
3	Deloitte Consulting	Consulting	1,850
4	Seminole State College of Florida	Education	1,300
5	Verizon Corporate Resources Group	Telecommunications	1,300
6	Liberty Mutual Insurance	Insurance	1,070
7	Veritas Technologies	Software	932
8	Central Florida Regional Hospital (HCA)	Healthcare	925
9	The American Automobile Association (AAA)	Automotive	900
10	Orlando Health (South Seminole Hospital)	Healthcare	900
11	Employee Leasing Solutions	Employment Agency	889
12	Paylocity Holding Corporation	Software	888
13	Universal American Corp	Insurance	800
14	Honeywell International Inc	Conglomerate	673
15	Agro Power Development, Inc (Village Farms)	Agriculture	650

Source: Seminole County





# Local Indoor Facilities

# Seminole Sports Academy

**Location:** Longwood, FL

**Owner/Operator:** Private

## **Sports Features:**

- 2 basketball courts
- 2 volleyball courts

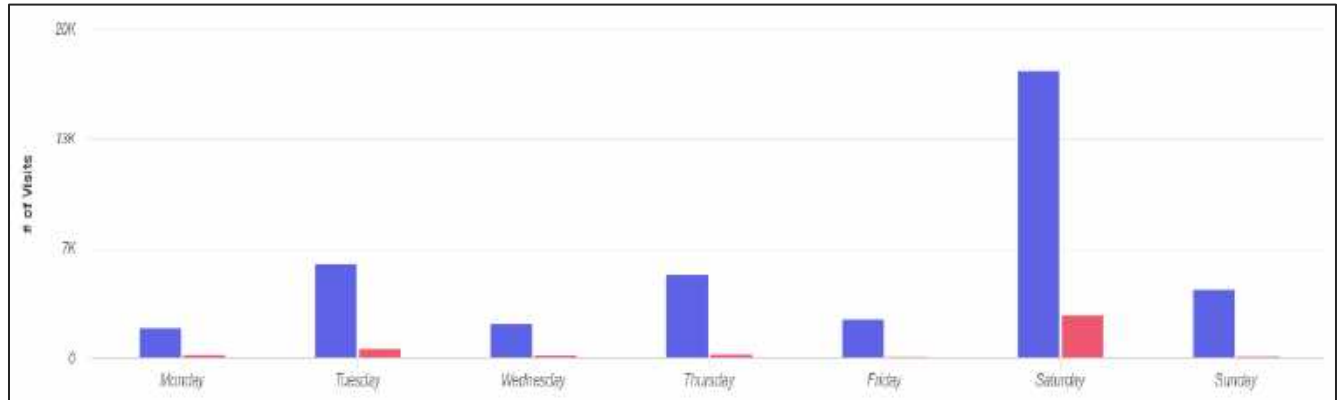
## **Notes:**

Seminole Sports Academy hosts local youth basketball and volleyball leagues as well as a variety of camps and clinics. The Seminole Sports Academy is operated on a membership basis model which means that each membership is dedicated to basketball, volleyball, or overall fitness. This is the only indoor facility in the local area that regularly hosts tournaments and leagues. However, the limited supply of courts at the facility limits the tournament capacity even with significant demand.

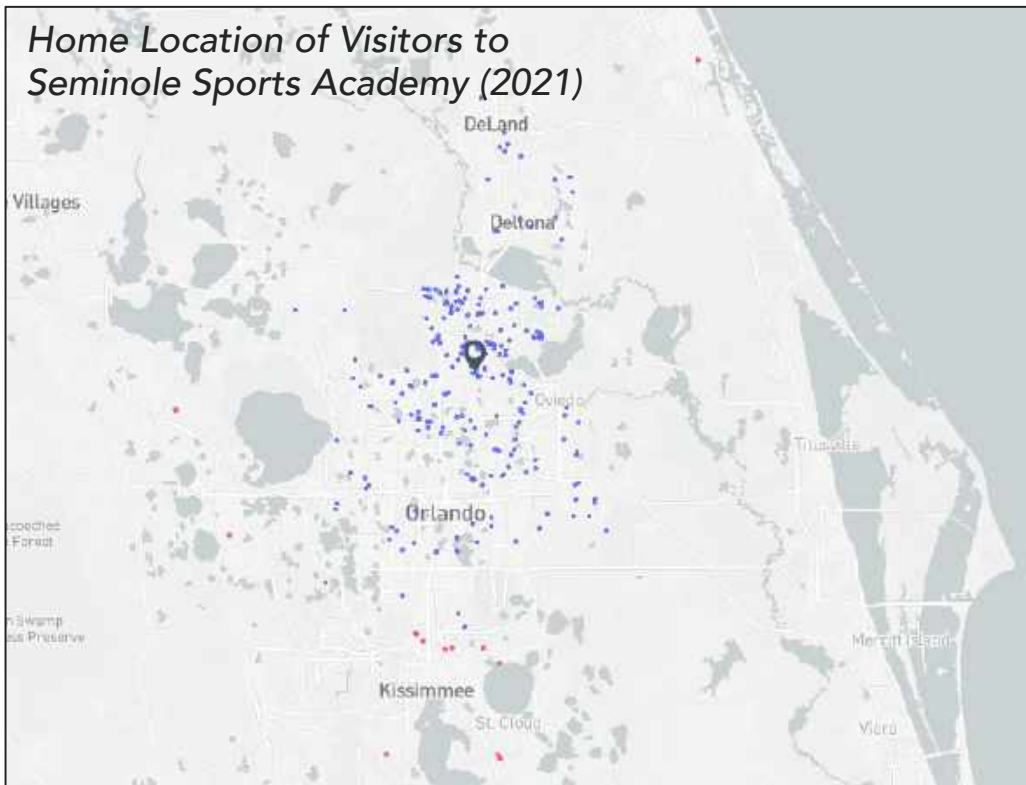


# Seminole Sports Academy Visitation

In 2021, the facility received over 42,600 visits from 8,500 visitors (an average of 5 visits per person). Since the complex is home to volleyball and basketball club teams and hosts camps and clinics, the facility attracted mainly local visitors in 2021. Lack of ample court space discourages regional visitation.



Home Location of Visitors to Seminole Sports Academy (2021)



Seminole Sports Academy - Longwood, FL					
January 2021 - December 2022					
Visitor Origins by Distance from Site Colors correspond to charts & maps	Total Visits		Total Unique Customers		Avg. Visits per Customer
	Est. Number of Visits	Percent of Total Visits	Est. Number of Customers	Percent of Total Customers	
Locals - Within 25 miles	38,700	90.8%	6,900	81.2%	5.61
Regional & Long Distance - Over 25 miles	3,900	9.2%	1,600	18.8%	2.44
<b>Total Visits</b>	<b>42,600</b>	<b>100.0%</b>	<b>8,500</b>	<b>100.0%</b>	<b>5.01</b>

Source: Placer.ai



# RDV Sportsplex

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**Location:** Orlando, FL

**Owner/Operator:** Genesis Health Clubs

**Sports Features:**

- 2 basketball courts
- 4 volleyball courts

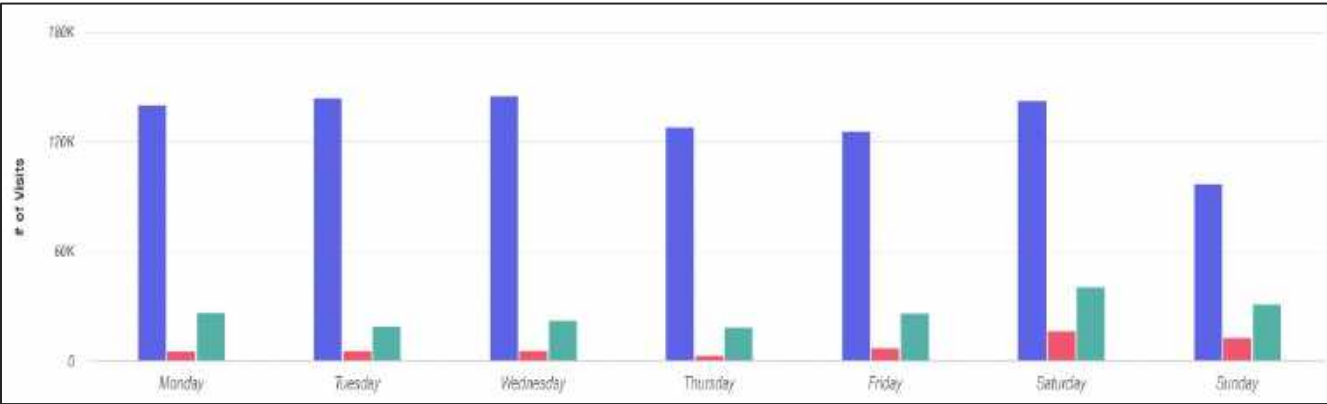
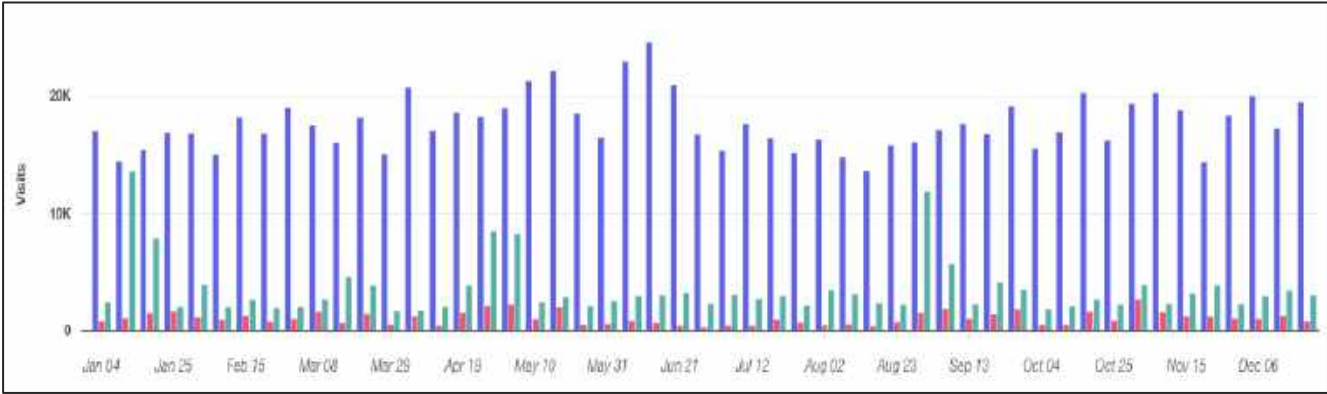
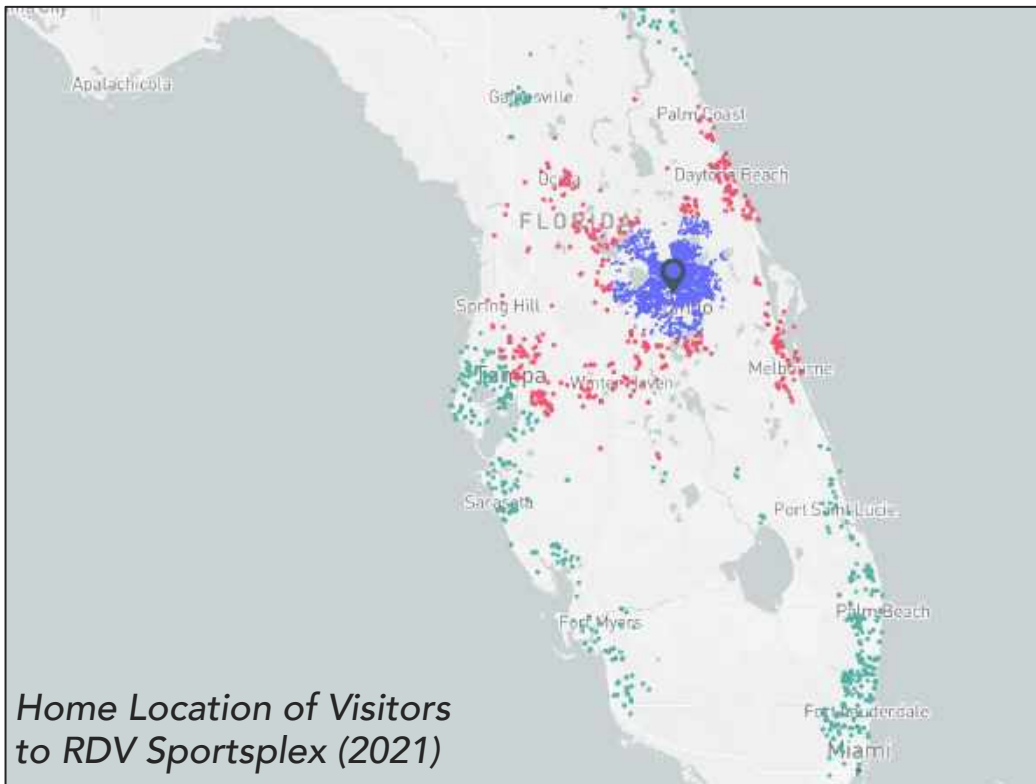
**Notes:**

The RDV Sportsplex is a 365,000 square foot facility that cost \$60 million to build in 1998. The former training facility of the Orlando Magic offers both Olympic and regular sized ice rinks, an indoor/outdoor pool, fitness center, tennis courts, and pickleball courts. The RDV Sportsplex has recently been purchased by Genesis Health Clubs increasing the Genesis portfolio to three Florida locations and over 60 locations throughout the Midwest.



# RDV Sportsplex Visitation

In 2021, nearly 80 percent of facility visitation came from people living within a 25-mile radius of RDV. As an indoor training facility, RDV does not attract large visitation numbers from outside the local market. Visitation throughout 2021 demonstrates some long distance visitation spikes as athletes will travel for specific tournament and event offerings.



RDV Sportsplex - Orlando, FL January 2021 - December 2021					
Visitor Origins by Distance from Site Colors correspond to charts & maps	Total Visits		Total Unique Customers		Avg. Visits per Customer
	Est. Number of Visits	Percent of Total Visits	Est. Number of Customers	Percent of Total Customers	
Locals - Within 25 miles	922,800	79.4%	91,400	60.9%	10.10
Regional Distance - Over 25 miles & Less Than 75 miles	55,200	4.7%	16,900	11.3%	3.27
Long Distance only - Over 75+ miles	184,400	15.9%	41,700	27.8%	4.42
<b>Total Visits</b>	<b>1,162,400</b>	<b>100.0%</b>	<b>150,000</b>	<b>100.0%</b>	<b>7.75</b>

Source: Placer.ai



# DME Academy

**Location:** Daytona Beach, FL

**Owner/Operator:** DME Academy

## **Sports Features:**

- 2 NBA basketball courts
- 5 youth basketball courts
- 7 volleyball courts

## **Notes:**

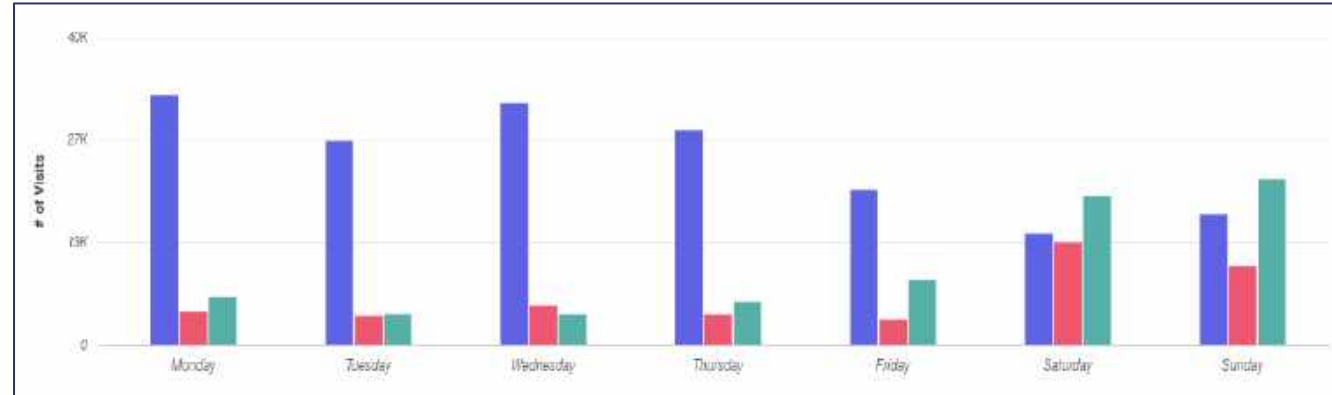
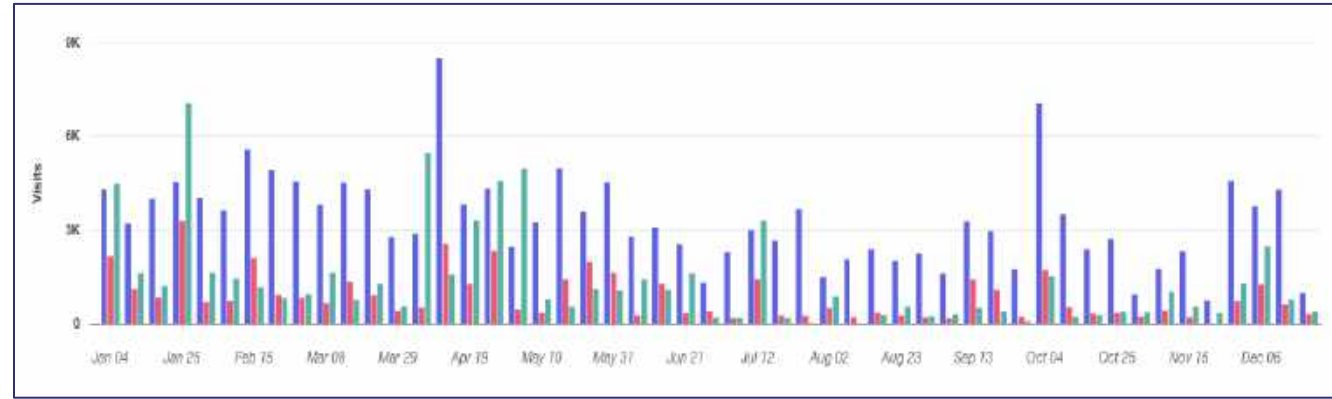
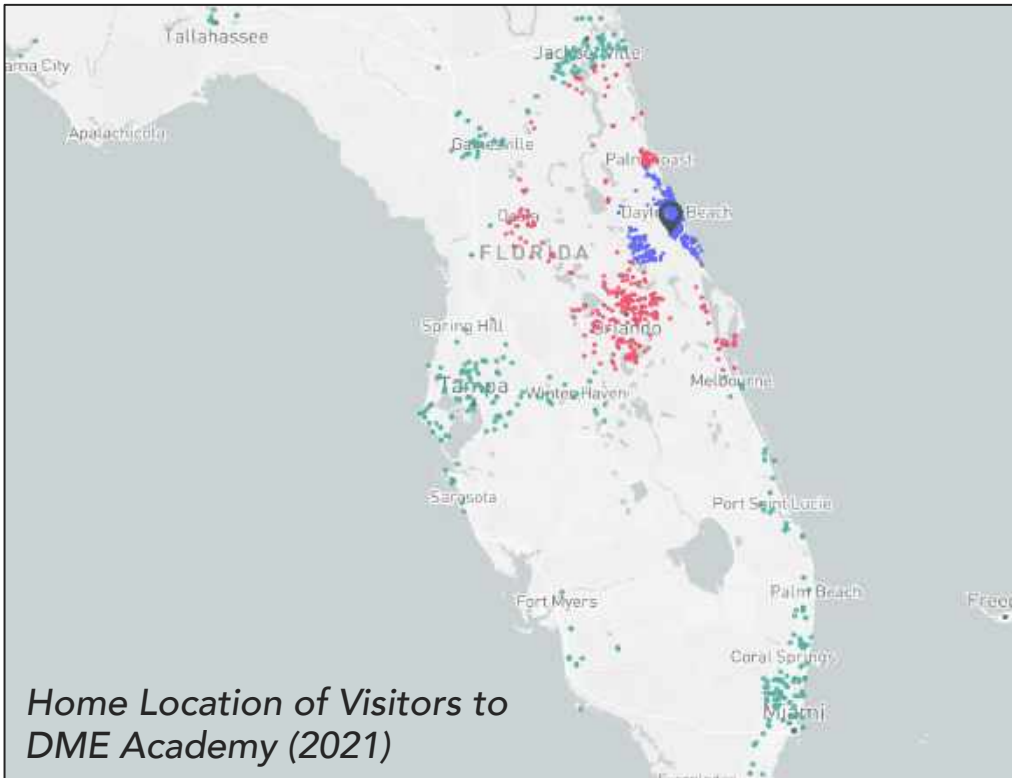
The DME Academy Campus is comprised of a field house, outdoor grounds, dormitory, and ice arena. The 47,000 square foot field house includes a performance center, athletic training rooms, a spa, basketball courts, and volleyball courts. The Outdoor Grounds consist of four sand/beach volleyball courts, a turf field, and an outdoor performance training area. The DME Academy Dormitory spans 18,000 square feet. It includes and includes an 80-bed dormitory with a fully equipped commercial kitchen, cafeteria, conference room, learning center, and outdoor court. The USTA Tennis Center and LPGA Daytona Golf Course are partner facilities which expand the Academy's athletic offerings.





# DME Academy Visitation

In 2021, DME Academy received 283,400 visits from 48,300 visitors (an average of about 6 visits per person). The facility receives a majority of visitation from the local population. Strong weekend visitation from regional and long-distance visitors along with the spikes in long distance visitation throughout 2021 implies that the facility has a strong tournament presence.



DME Academy - Daytona Beach, FL January 2021 - December 2021					
Visitor Origins by Distance from Site Colors correspond to charts & maps	Total Visits		Total Unique Customers		Avg. Visits per Customer
	Est. Number of Visits	Percent of Total Visits	Est. Number of Customers	Percent of Total Customers	
Locals - Within 25 miles	170,100	60.0%	12,000	24.8%	14.18
Regional Distance - Over 25 miles & Less Than 75 miles	44,300	15.6%	12,200	25.3%	3.63
Long Distance only - Over 75+ miles	69,000	24.3%	24,100	49.9%	2.86
<b>Total Visits</b>	<b>283,400</b>	<b>100.0%</b>	<b>48,300</b>	<b>100.0%</b>	<b>5.87</b>

Source: Placer.ai



# Regional Facilities

# Pick A Ball Sports Complex

**Location:** Deerfield Beach, FL

**Opened:** 1998

**Owner/Operator:** Private

**Sports Features:**

- 6 basketball courts
- 8 volleyball courts

**Notes:**

The Pick A Ball Sports Complex is a multipurpose building totaling 74,000 square feet that hosts volleyball, basketball, pickleball, futsal, birthday parties and Esports.

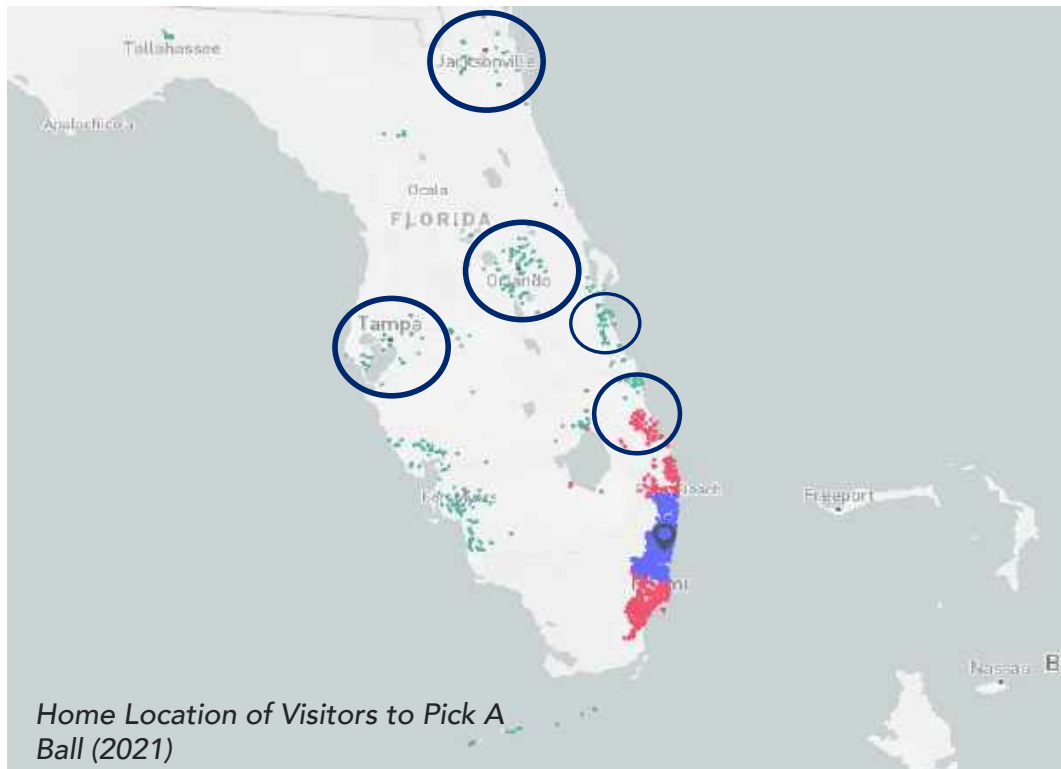
The facility is open to the public to rent for practices, games and camps and hosts indoor tournaments on the weekends for volleyball, basketball, cheer and dance and wrestling.





# Pick A Ball Sports Complex Visitation

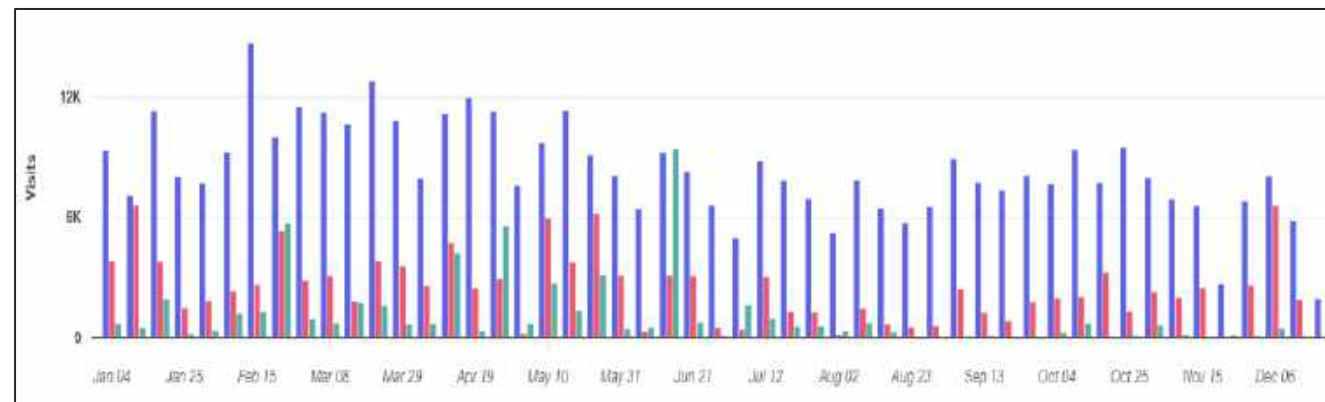
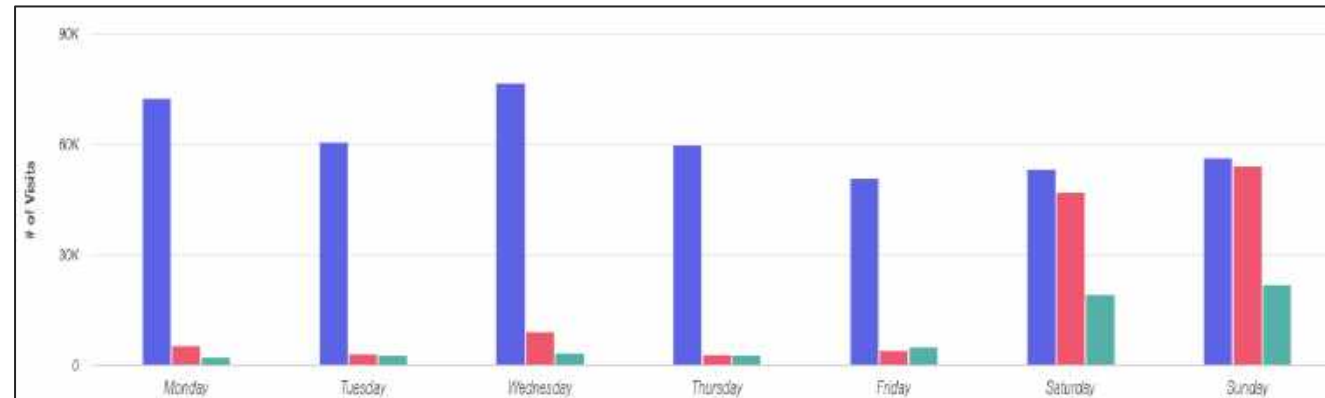
Visitation data shows that Pick A Ball Sports Complex attracted 70 percent of its visitation within 25 miles in 2021, showing that the facility is highly attended throughout the weekdays. The complex caters to its local users and presents an opportunity for the Project to capture existing demand in other markets with high quality tournament offerings.



Pick A Ball Sports Complex - Deerfield Beach, FL  
January 2021 - December 2021

Visitor Origins by Distance from Site	Total Visits		Total Unique Customers		Avg. Visits per Customer
	Est. Number of Visits	Percent of Total Visits	Est. Number of Customers	Percent of Total Customers	
Locals - Within 25 miles	429,800	70%	53,000	48%	8.11
Regional Distance - Between 25 and 75 miles	125,400	20%	34,500	31%	3.63
Long Distance only - Over 75 miles	56,700	9%	23,600	21%	2.40
<b>Total Visits</b>	<b>611,900</b>	<b>100%</b>	<b>111,100</b>	<b>100%</b>	<b>5.51</b>

Source: Placer.ai





# Other Facilities

# IMG Academy

**Location:** Bradenton, FL

**Opened:** 2021

**Owner/Operator:** Private

## Notes:

The IMG Academy boarding school is a developmental and college preparatory facility focused on training and sports education for young athletes. In 2021, IMG opened a new basketball and tennis facility in 2021 that includes three hardwood training courts and one showcase court (seating for 1,300).

IMG hosts national high school basketball tournaments for the nations top programs and showcases for highly-recruited prospects. **Since the programming of the facility revolves around the boarding school's operations, the facility is not directly competitive with the project, but is a notable facility within the Florida market.**





# Ocala World Equestrian Center

**Location:** Ocala, FL

**Opened:** 2021

**Owner/Operator:** Private

## Notes:

The Ocala World Equestrian Center offers a multipurpose indoor arena and outdoor arena. While the facility mainly hosts equine and canine events, the indoor arena hosts conventions, tradeshow, court sport tournaments, weddings.

The indoor arena offers 132,000 square feet of floor space capable of hosting basketball, volleyball, cheer and dance, wrestling, martial arts and roller sports tournaments. Interviews with regional tournament operators revealed that the facility host several court sport tournaments throughout the year, but due to the concert flooring, sports courts are needed, which has proven to be a less favorable setting for high-level tournament play.



# Southwest Recreation Center & Sports Complex

**Location:** Gainesville, FL

**Opened:** 1994

**Owner/Operator:** University of Florida

**Sports Features:**

- 6 basketball courts
- 6 volleyball courts

**Notes:**

The Southwest Recreation Center and Sports Complex is located on the University of Florida's campus and is primarily reserved student, alumni and faculty use. The facility is does host tournaments, but university use takes priority over third-party scheduling. **As a result, the facility is not directly competitive with the Project.**





# Support Amenities: Hotel



# Seasonality

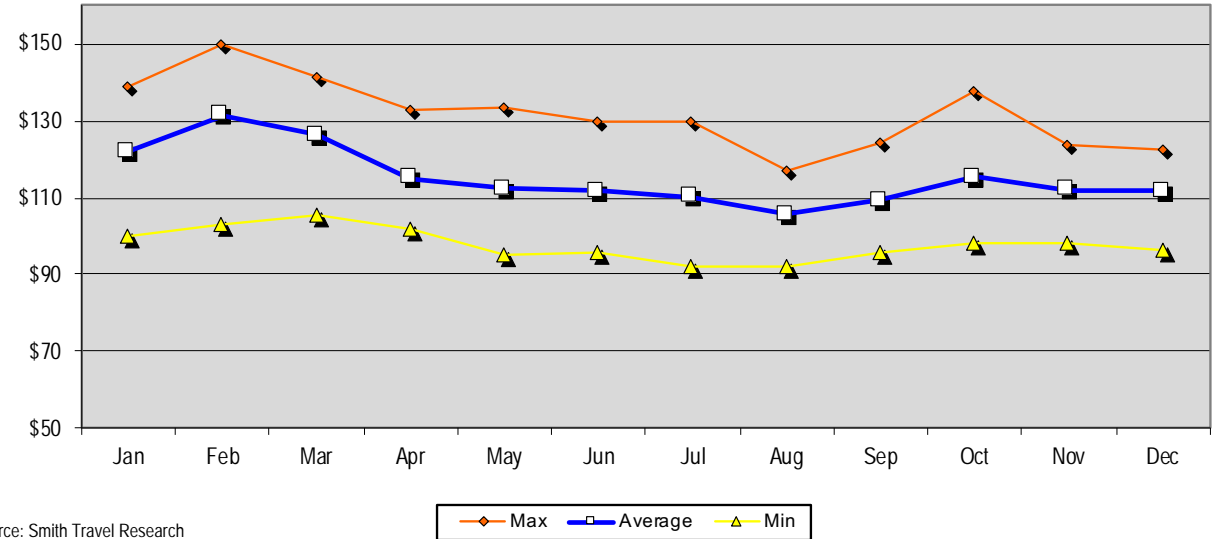
## ADR & Occupancy

The adjacent tables detail the seasonal performance of the local competitive set since 2014.

As shown, the competitive set experiences its highest rates during the fall and winter months due to the climate and increased visitation from colder markets. In this case, the late summer months are more affordable given the extreme heat, demanding the lowest average historical rates, which is unusual in most markets.

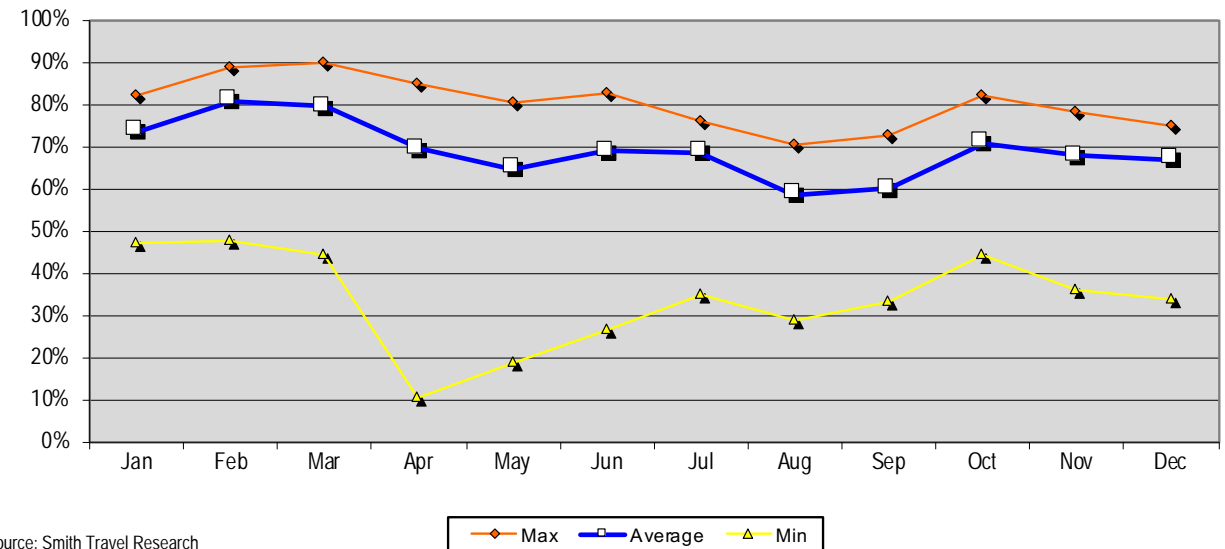
Occupancy trends follow a similar pattern as rates, with the shoulder season months being the highest demand periods.

Seasonality of Rate (January 2014 - October 2022)



Source: Smith Travel Research

Seasonality of Occupancy (January 2014 - October 2022)



Source: Smith Travel Research

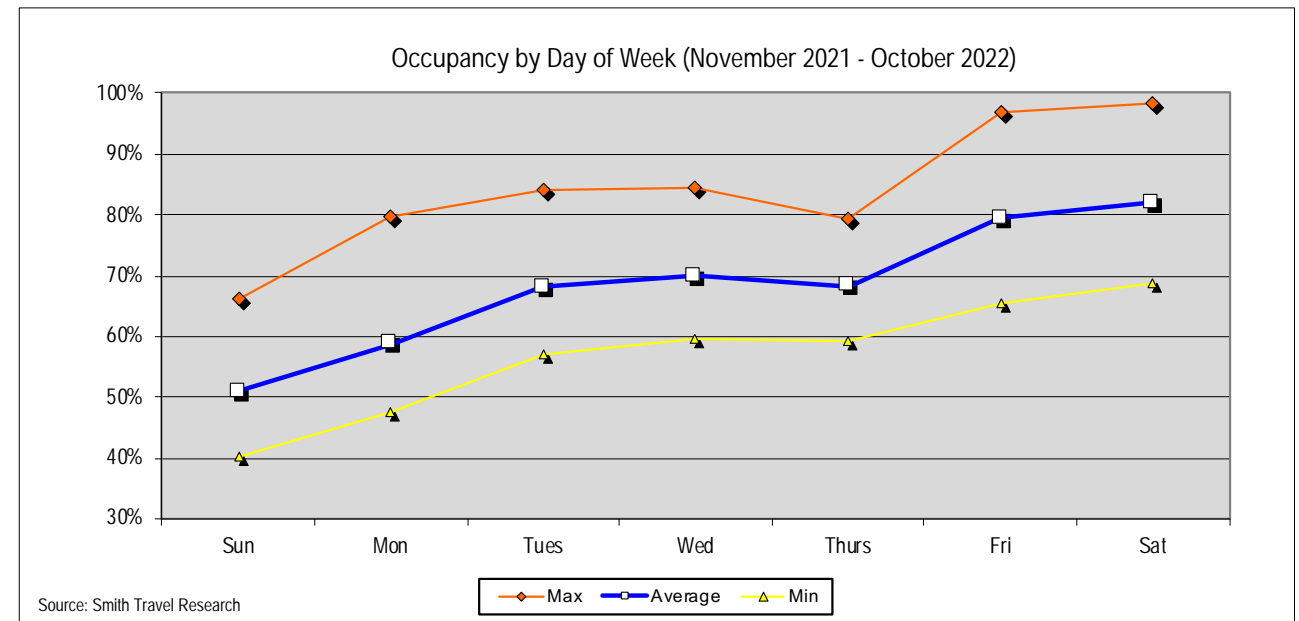
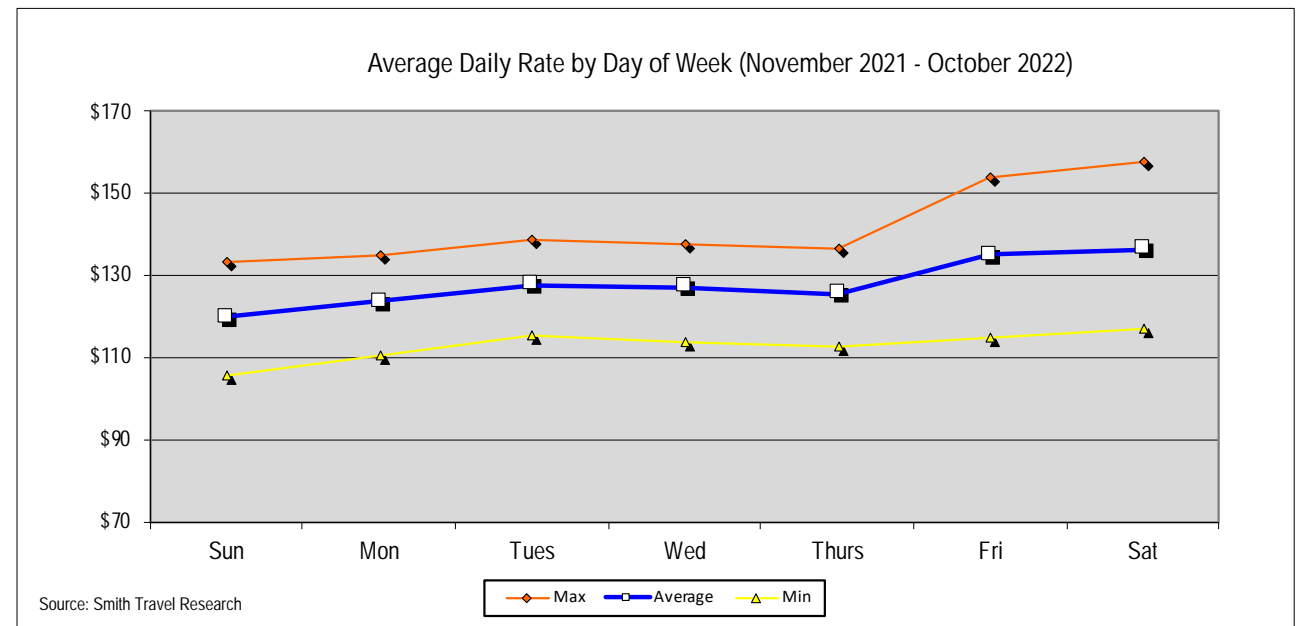
# Day of Week

## ADR & Occupancy

The adjacent tables detail the weekly performance of the local competitive set from November 2021 through October 2022.

Typically, group and corporate travel occurs from Sunday through Thursday, while leisure travel occupies Friday and Saturday. The highest rates in the competitive set are on weekends although they are not that much higher than the weekdays.

On average, occupancy is greatest on Fridays and Saturdays, leading to a conclusion that leisure drives performance in the competitive set. Prior to the pandemic, corporate travel was a substantial demand driver during weekdays. However, corporate travel has not yet returned to the area in the same capacity where demand was stronger throughout the week prior the COVID-19 pandemic and restricted travel. A new trend called bleisure travel has grown in popularity all over the country, which is a hybrid of business and leisure travel that has induced more room nights during the week that will lead into the weekend on some occasions.

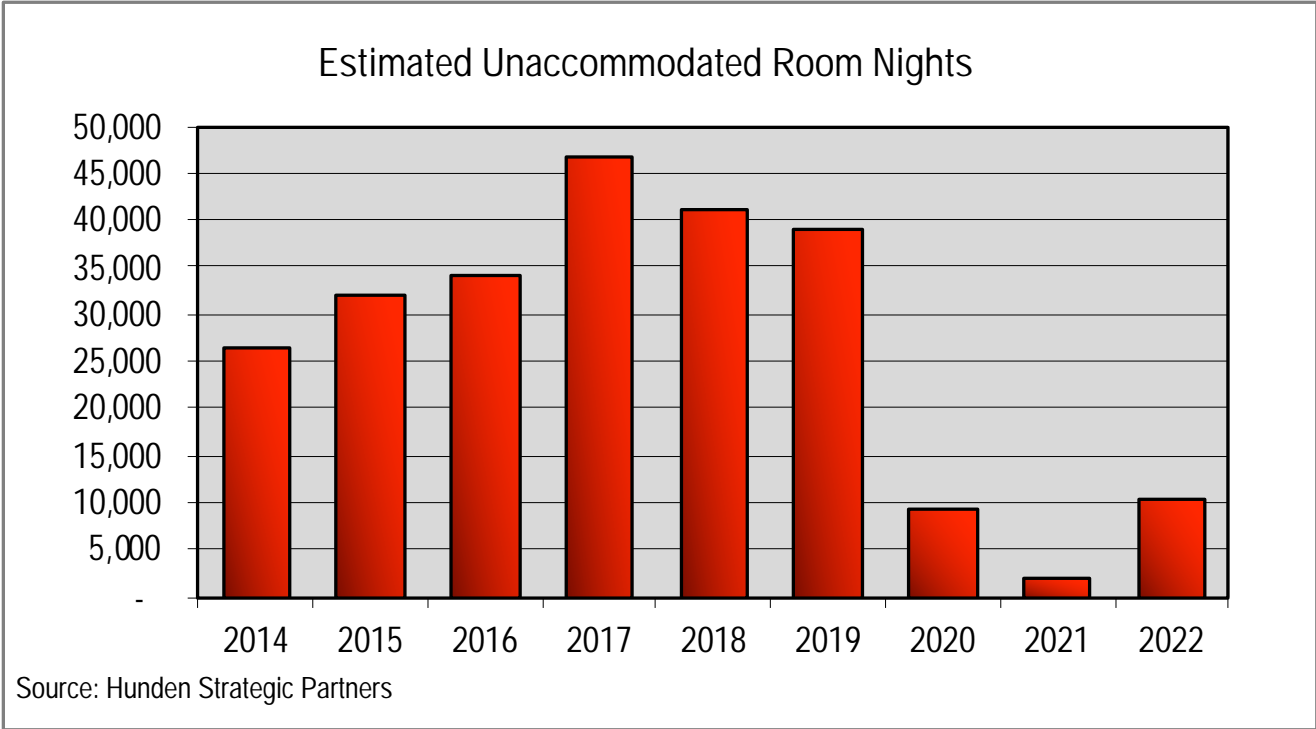


# Unaccommodated Room Nights

*Unaccommodated room nights are described as excess demand for hotel room nights produced by lodgers who are displaced because they are unable to book a room in the hotel of their choice due to it being sold out.*

The adjacent tables detail the annual estimated unaccommodated room nights.

2017 and 2018 had the greatest amount of excess demand that could not be accommodated at more than 45,000 and 40,000 room nights, respectively.





# Interviews & Feedback

## Hoteliers

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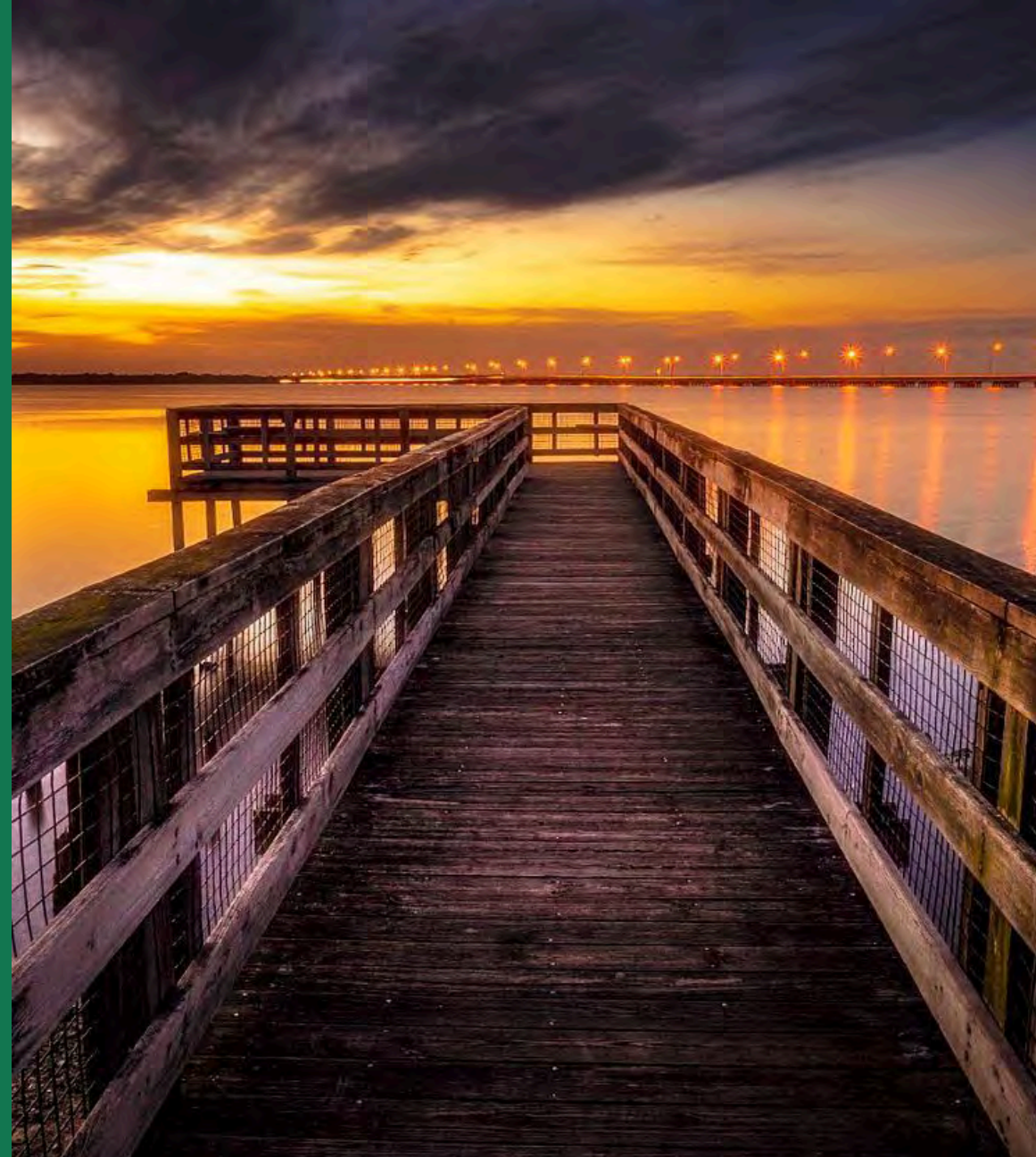
HSP interviewed upper-level management at full-service hotels within the Seminole County hospitality market to better understand demand drivers and overall performance within the market. The following key implications were drawn:

- Corporate travel is nowhere near what it was prior to COVID-19. Most of the full-service hotels in the area are located near the high-tech corridor in Lake Mary where major Fortune 500 companies are located such as Deloitte, Wells Fargo and Verizon. However, since the pandemic and work from home culture there is way less corporate travel.
- Currently youth sports drives business during the spring, summer and fall months mainly. Given the climate in Central Florida, slower months include July and August given the extreme heat. However, youth sports operates on a year-round basis that helps fill the void.
  - Double queen rooms are the most popular for youth sports and many of these rooms are sold out on the weekends because of tournaments at Boombah Sports Complex.
- Meeting space is limited across hotels in the area with the Marriott having the largest single-room meeting space with an 8,400-square-foot ballroom and a junior ballroom of 1,500 square feet.
- Overall, the hospitality market in Seminole County needs to grow and help attract new business. Youth sports has been great for hotels in the area especially during the off-season and a potential new indoor sports facility could help facilitate future growth.

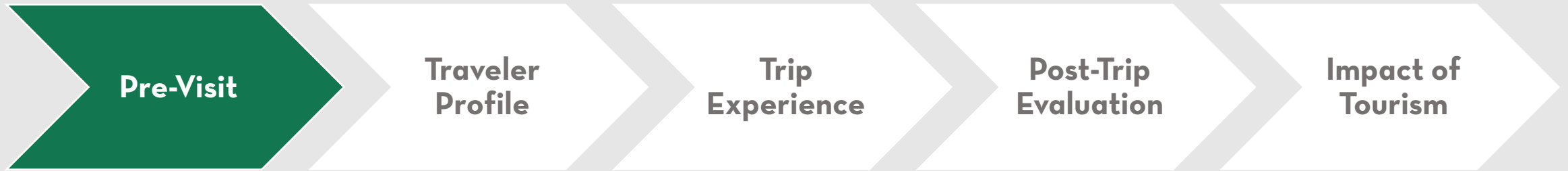
# ORLANDO NORTH, SEMINOLE COUNTY

## Visitor Tracking Report

October – December 2022



# TRIP PLANNING CYCLE: PRE-VISIT





# TRIP PLANNING CYCLE

- Visitors to Orlando North, Seminole County have short trip planning windows, as the average visitor took **42 days** to plan their trip
- **About 2 in 3** visitors planned their trip to the Orlando North, Seminole County area **fewer than two months in advance**

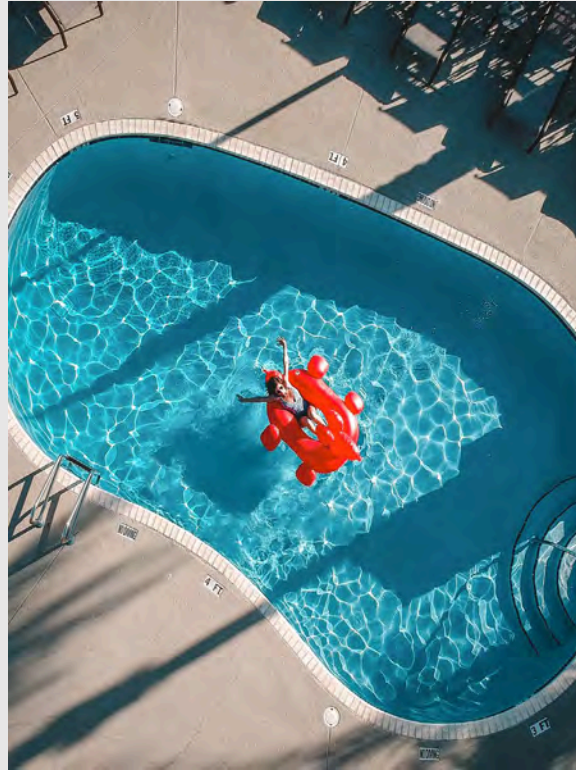


# TOP TRIP PLANNING SOURCES\*



**Friends/family**

42%



**Hotel websites/apps**

25%



**Search sites**

23%



**Personal social media**

21%



# TOP REASONS FOR VISITING\*



Visit friends/relatives

52%



Vacation/leisure trip

24%



Special occasion/event

20%



Sporting event

15%



# PRE-TRIP EXPOSURE TO ADVERTISING



# SOURCES OF ADVERTISING EXPOSURE\*

Base: 29% of visitors who noticed advertising.



**Personal social media**

36%



**ONSC social media**

24%



**Travel/visitor guide**

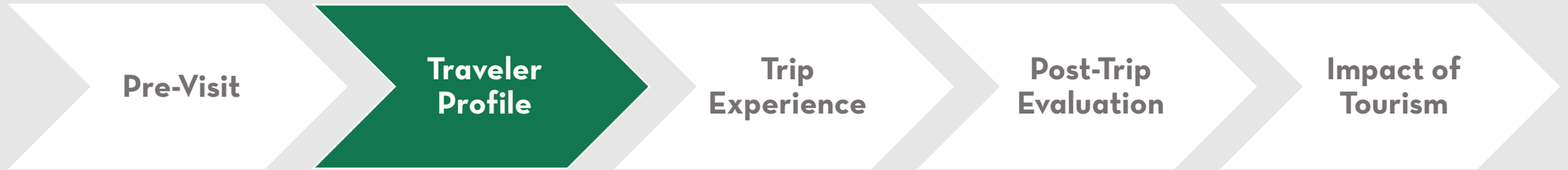
22%



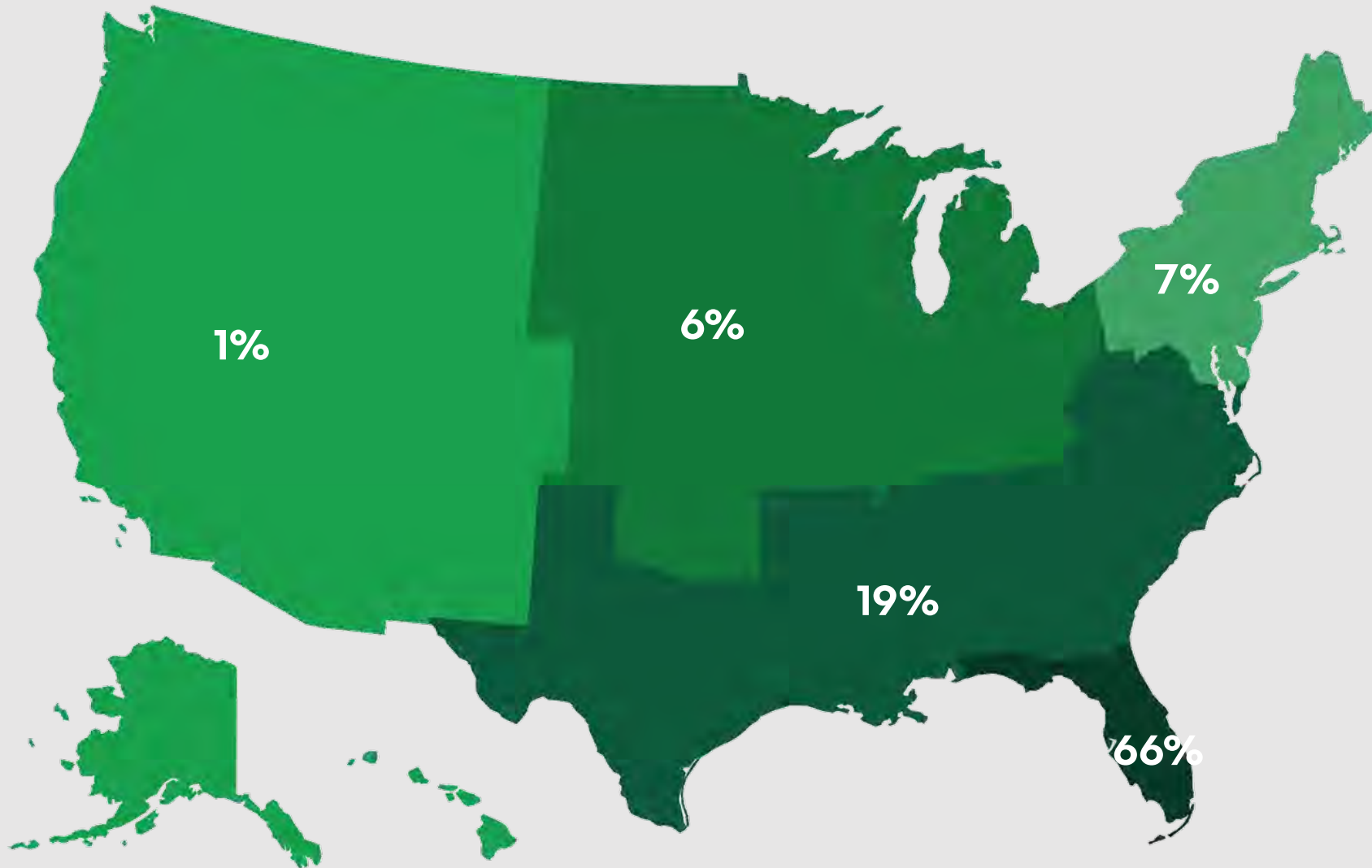
**PlayOrlandoNorth.com**

19%

# TRIP PLANNING CYCLE: TRAVELER PROFILE

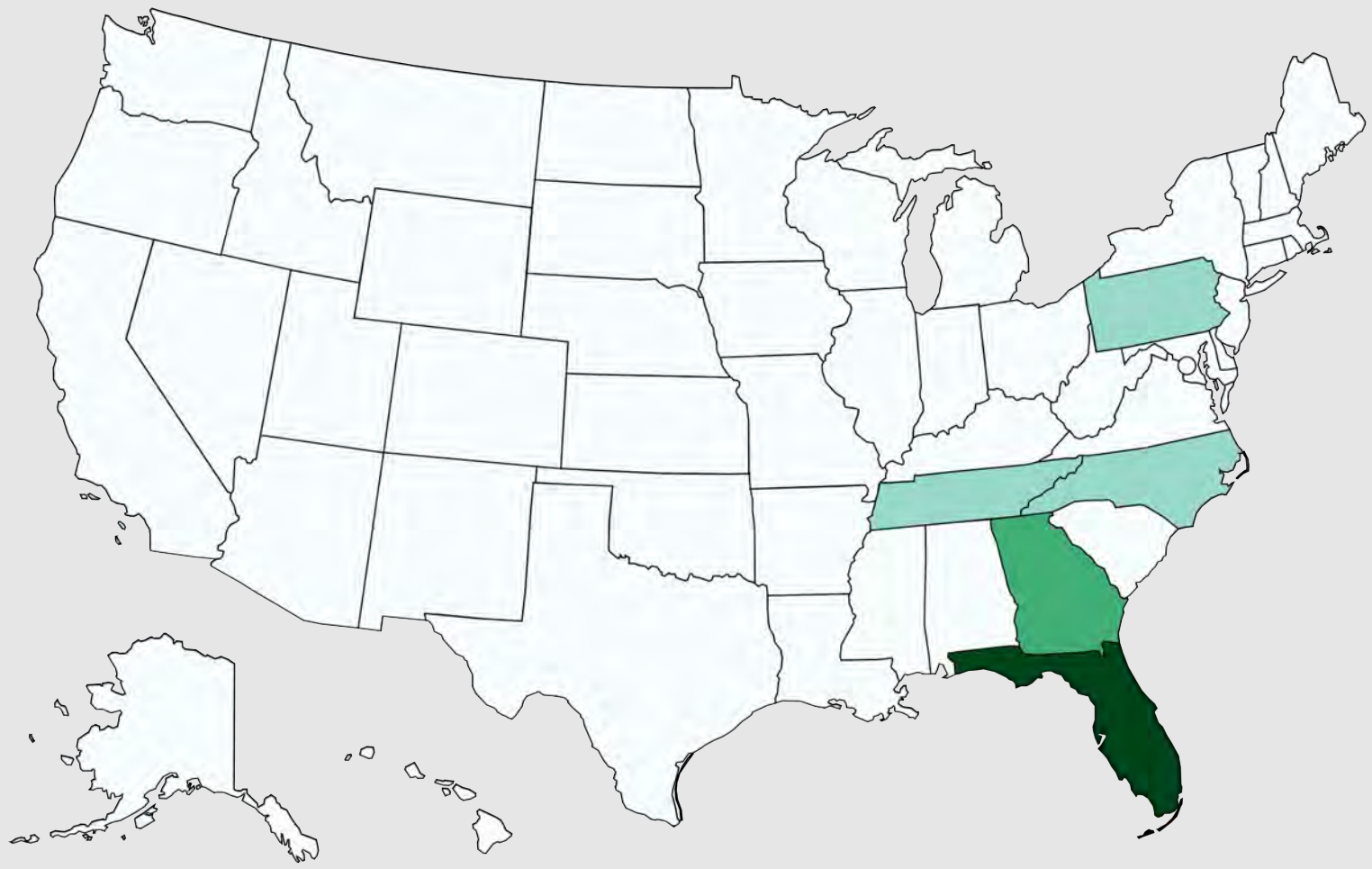











1% of visitors traveled to Orlando North, Seminole County from outside of the U.S.

# TOP STATES OF ORIGIN



-  **66%** Florida
-  **7%** Georgia
-  **3%** Pennsylvania
-  **3%** North Carolina
-  **3%** Tennessee

# TOP MARKETS OF ORIGIN



**Orlando - Daytona Beach  
- Melbourne**

30%



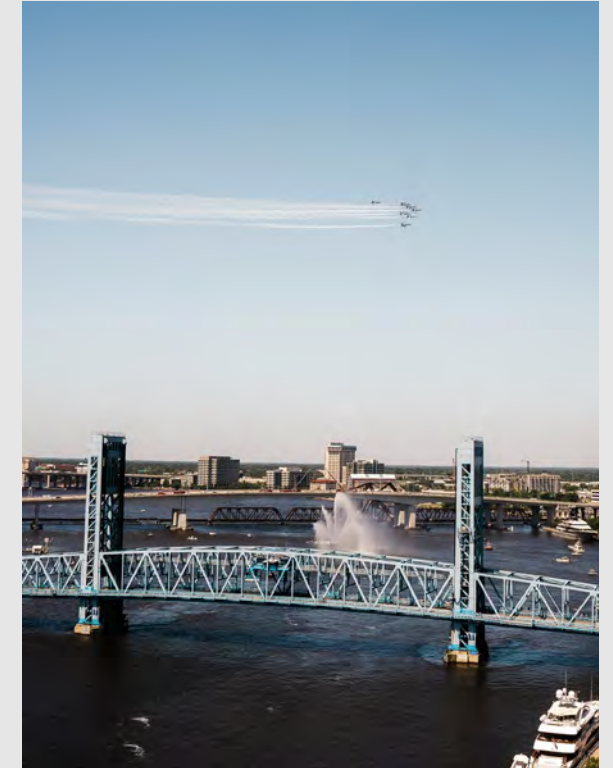
**Tampa - St. Petersburg**

12%



**Miami - Fort Lauderdale**

6%



**Jacksonville**

5%



# TRAVEL PARTIES

- ▶ The typical visitor traveled in a party composed of **2.2** people
- ▶ **About 1 in 4** visitors traveled with at least one person under the age of 20
- ▶ **About 2 in 5** visitors traveled **by themselves** and **3 in 10** visitors traveled as a **couple**



# VISITOR PROFILE

- The typical Orlando North, Seminole County visitor:
  - Is **46** years old
  - Has a household income of **\$96,400** per year
  - Is **female**<sup>1</sup> (56%)
  - **Single** (53%)





# NEW & RETURNING VISITORS

- ▶ **1 in 3** visitors were first time visitors to Orlando North, Seminole County
- ▶ **18%** of visitors were loyalists, having visited over 10 times





# SPORTS VISITORS

Compared to all other visitors, **Sports Visitors** to Orlando North, Seminole County are more likely to:

- Use **online sources** to help plan their trip to the area, specifically **hotel websites/apps**, **trip planning websites/apps**, or **personal social media**
- **Notice advertising** about the area
- Live outside of Florida
- Be a **first-time visitor**
- Have a longer length of stay
- Stay in a **hotel/motel/resort**
- Spend more in the area, specifically on **accommodations** and **restaurants**

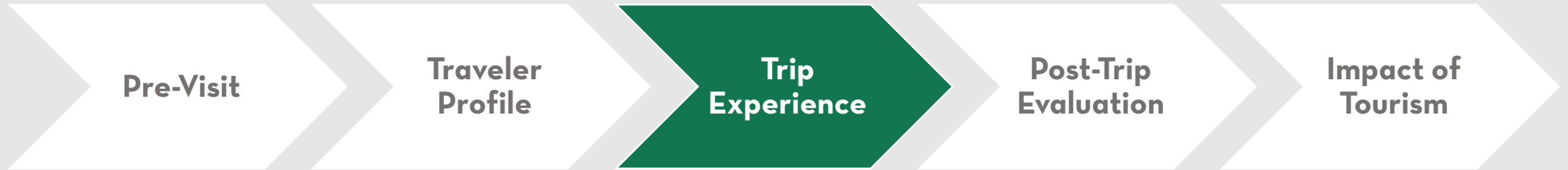


# SPORTS SLIPPAGE

- Visitors coming to Orlando North, Seminole County for a sporting event this quarter primarily stayed in a **hotel/motel/resort** within Seminole County
- Only **4%** chose to stay in accommodations outside of Seminole County



# TRIP PLANNING CYCLE: TRIP EXPERIENCE





# TRANSPORTATION

- **92%** of visitors drove to the Orlando North, Seminole County area
- **3%** of visitors used the Orlando Sanford International Airport
- **4%** of visitors flew to Orlando North, Seminole County through the Orlando International Airport



# OVERNIGHT VISITORS

- **7 in 10** of visitors stayed one or more nights in Orlando North, Seminole County on their trip
- Typical visitors stayed **2.4** nights in Orlando North, Seminole County area





# TOP ACCOMMODATIONS



**Hotel/motel/resort**

41%



**Did not spend the night**

29%



**Friends/relatives**

24%



# TOP ACTIVITIES\*



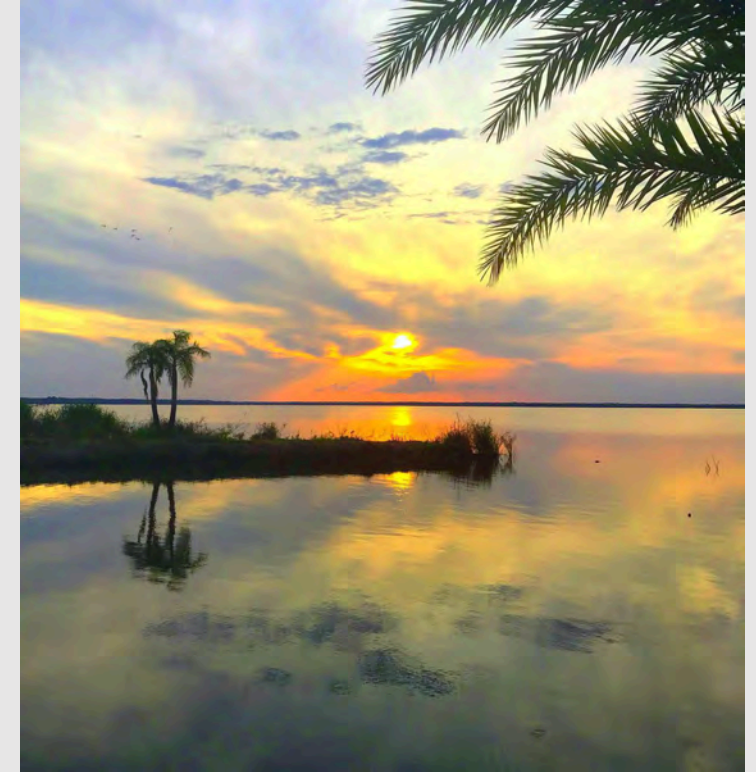
**Visit friends/relatives**

52%



**Restaurants**

36%



**Relax/unwind**

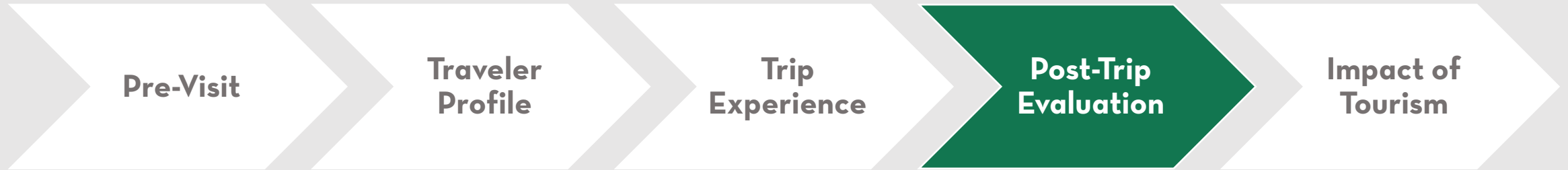
30%

# TRAVEL PARTY SPENDING

- ▶ Travel parties spent **\$293** per day and **\$697** during their trip



# TRIP PLANNING CYCLE: POST TRIP EVALUATION





# VISITOR SATISFACTION

- ▶ **77%** of visitors were either satisfied or very satisfied with their trip to Orlando North, Seminole County



# LIKLIHOOD OF RETURNING

- ▶ **85%** of visitors would **return** to the Orlando North, Seminole County area, and **3 in 10** visitors would **definitely return**
- ▶ **About 3 in 4** visitors would **recommend** visiting the Orlando North, Seminole County area, and **1 in 4** visitors would **definitely recommend** it





# DESTINATION ADDITIONS\*

- When asked what additions would make their return more desirable, **1 in 2** visitors said **no additions were needed**
- On the other hand, **1 in 3** visitors said they would like **more family-friendly activities**





# AREA DESCRIPTIONS\*



## Enjoyed local restaurants:

*"We ate twice at Angel's restaurant which has consistently good food and was closest to our tournament. We also went to Shantell's which had good drinks and live music."*

## Nature, parks, and scenic views:

*"We're staying near Center Lake Park where there is plentiful wildlife. The kids enjoyed the playground while I jogged the ample grassy area. The amphitheater is beautiful."*



## Something for the whole family:

*"Take your family to Rita's ice cream. This is a great area for bike rides with well laid-trails. We also enjoyed Treasure Island Arcade."*

# METHODOLOGY



- ▶ Interviews were completed in person and online with 722 visitors at local hotels, the airport, downtown, and sporting events between October 1, 2022 and December 31, 2022



# Visitor Tracking Executive Summary

## October – December 2022

Downs & St. Germain Research  
contact@dsg-research.com  
850-906-3111 | www.dsg-research.com





CENTRAL FLORIDA ZOOLOGICAL SOCIETY, INC.  
 UNAUDITED MONTHLY RESULTS AS OF DEC 31, 2022

	<b>Dec-22</b>	<b>Nov-22</b>	<b>M-O-M</b>	<b>%</b>
	<b>Unaudited Actuals</b>	<b>Unaudited Actuals</b>	<b>Dec/Nov</b>	<b>Change</b>
<b>Revenues</b>				
Annual passholders	\$ 58,529	\$ 57,908	\$ 621	1%
Gate	\$ 277,783	\$ 187,416	\$ 90,367	48%
Group sales	\$ 11,125	\$ 4,208	\$ 6,917	164%
Concessions	\$ 31,386	\$ 12,029	\$ 19,357	161%
Gift shop	\$ 73,014	\$ 19,113	\$ 53,901	282%
Government support	\$ 325,000	\$ 40,303	\$ 284,697	706%
Education	\$ 14,606	\$ 12,407	\$ 2,199	18%
WMD net rental	\$ 5,596	\$ 2,535	\$ 3,061	121%
Public support	\$ 80,152	\$ 287,297	\$ (207,145)	-72%
Net event revenues	\$ 391,671	\$ 314,284	\$ 77,387	25%
Zipline	\$ 11,422	\$ 3,216	\$ 8,206	255%
Train/Carousel	\$ -	\$ -	\$ -	
Other revenues	\$ 29,299	\$ 15,758	\$ 13,541	86%
<b>Total revenues</b>	<b>\$ 1,309,583</b>	<b>\$ 956,474</b>	<b>\$ 353,109</b>	<b>37%</b>
<b>Operating expenses</b>				
Payroll	\$ 280,057	\$ 271,763	\$ 8,294	3%
Animal care	\$ 23,184	\$ 24,988	\$ (1,804)	-7%
Facilities repair and maintenance	\$ 20,753	\$ 16,087	\$ 4,666	29%
Advertising	\$ 17,715	\$ 41,916	\$ (24,201)	-58%
Insurance	\$ 69,474	\$ 66,178	\$ 3,296	5%
Utilities	\$ 16,203	\$ 17,123	\$ (920)	-5%
Professional fees	\$ 12,125	\$ 15,650	\$ (3,525)	-23%
Employee expenses	\$ 7,677	\$ 6,331	\$ 1,347	21%
Office expenses/website/credit card fees	\$ 344	\$ 1,682	\$ (1,338)	-80%
Project Expenses	\$ 15,968	\$ 25,498	\$ (9,530)	-37%
Printing	\$ 297	\$ 2,777	\$ (2,480)	-89%
Supplies	\$ 8,478	\$ 7,440	\$ 1,038	14%
Other operating expenses	\$ 66,216	\$ 51,092	\$ 15,124	30%
<b>Total operating expenses</b>	<b>\$ 538,490</b>	<b>\$ 548,526</b>	<b>\$ (10,036)</b>	<b>-2%</b>
<b>Net operating income before depreciation</b>	<b>\$ 771,092</b>	<b>\$ 407,948</b>	<b>\$ 363,144</b>	<b>89%</b>

CENTRAL FLORIDA ZOOLOGICAL SOCIETY, INC.  
 UNAUDITED MONTHLY RESULTS AS OF DEC 31, 2022

	<u>Dec-22</u> <u>Unaudited Actuals</u>	<u>Dec-21</u> <u>Unaudited Actuals</u>	<u>Y-O-Y</u> <u>2022/2021</u>	<u>%</u> <u>Change</u>
<b>Revenues</b>				
Annual passholders	\$ 58,529	\$ 68,694	\$ (10,165)	-15%
Gate	\$ 277,783	\$ 247,011	\$ 30,772	12%
Group sales	\$ 11,125	\$ 2,337	\$ 8,788	376%
Concessions	\$ 31,386	\$ 13,868	\$ 17,518	126%
Gift shop	\$ 73,014	\$ 72,150	\$ 864	1%
Government support	\$ 325,000	\$ -	\$ 325,000	
Education	\$ 14,606	\$ 10,075	\$ 4,531	45%
WMD net rental	\$ 5,596	\$ 6,229	\$ (633)	-10%
Public support	\$ 80,152	\$ 65,222	\$ 14,930	23%
Net event revenues	\$ 391,671	\$ 442,626	\$ (50,954)	-12%
Zipline	\$ 11,422	\$ 22,165	\$ (10,743)	-48%
Train/Carousel	\$ -	\$ 5,275	\$ (5,275)	-100%
Other revenues	\$ 29,299	\$ 20,870	\$ 8,429	40%
<b>Total revenues</b>	<u>\$ 1,309,583</u>	<u>976,522</u>	<u>\$ 333,061</u>	34%
<b>Operating expenses</b>				
Payroll	\$ 280,057	\$ 244,945	\$ 35,112	14%
Animal care	\$ 23,184	\$ 21,236	\$ 1,948	9%
Facilities repair and maintenance	\$ 20,753	\$ 15,606	\$ 5,147	33%
Advertising	\$ 17,715	\$ 4,572	\$ 13,143	287%
Insurance	\$ 69,474	\$ 56,042	\$ 13,432	24%
Utilities	\$ 16,203	\$ 16,450	\$ (247)	-2%
Professional fees	\$ 12,125	\$ 3,150	\$ 8,975	285%
Employee expenses	\$ 7,677	\$ 1,307	\$ 6,371	488%
Office expenses/website/credit card fees	\$ 344	\$ 623	\$ (279)	-45%
Project Expenses	\$ 15,968	\$ 598	\$ 15,370	2569%
Printing	\$ 297	\$ 15	\$ 282	1892%
Supplies	\$ 8,478	\$ 15,746	\$ (7,269)	-46%
Other operating expenses	\$ 66,216	\$ 17,191	\$ 49,025	285%
<b>Total operating expenses</b>	<u>\$ 538,490</u>	<u>397,482</u>	<u>\$ 141,008</u>	35%
<b>Net operating income before depreciation</b>	<u>\$ 771,092</u>	<u>\$ 579,040</u>	<u>\$ 192,053</u>	25%

CENTRAL FLORIDA ZOOLOGICAL SOCIETY, INC.  
 UNAUDITED MONTHLY RESULTS AS OF DEC 31, 2022

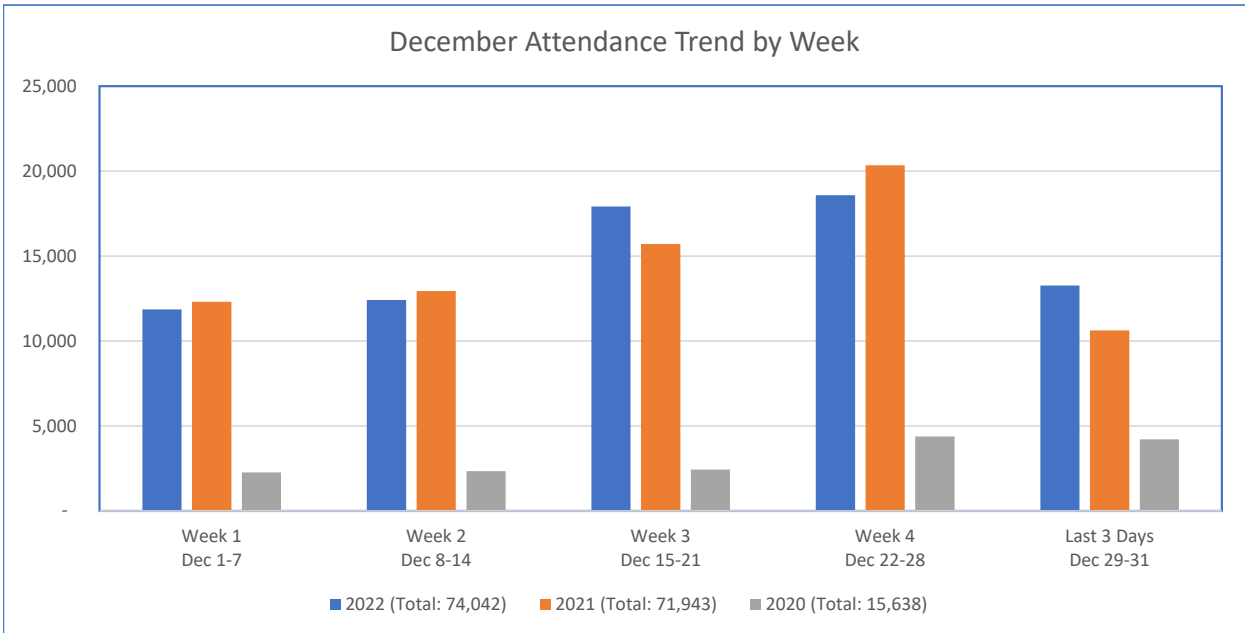
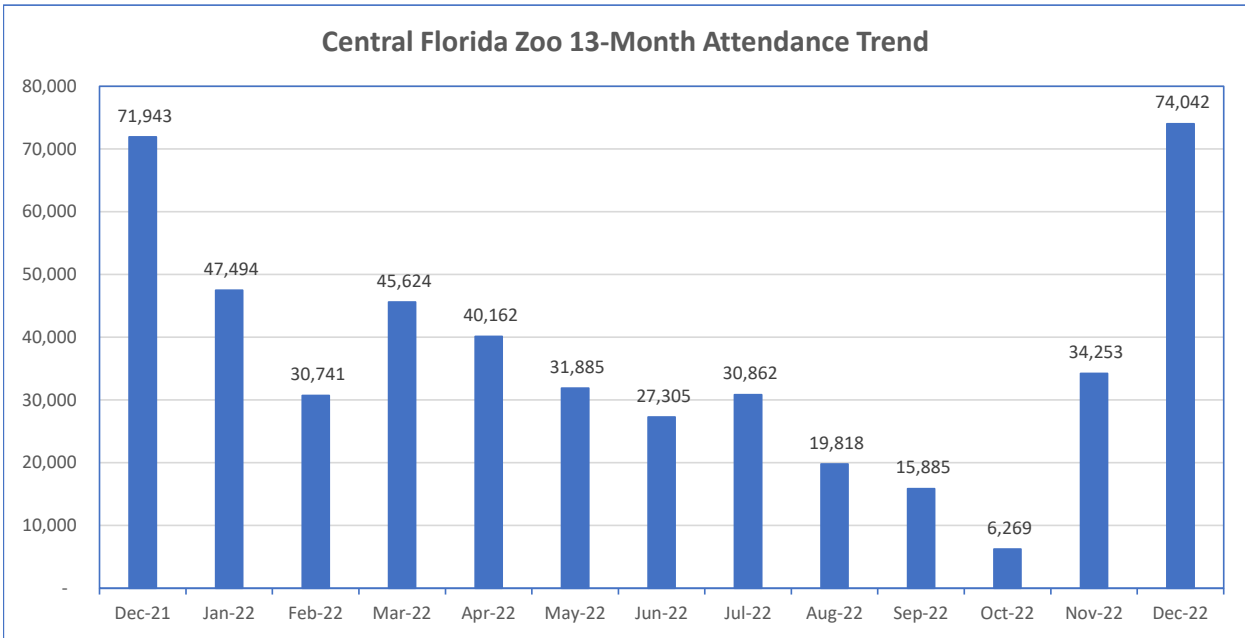
	<b>Dec-22</b> <b>Unaudited Actuals</b>	<b>Dec-22</b> <b>Budget</b>	<b>Actual to</b> <b>Budget</b>	<b>Actual to</b> <b>Budget %</b>
<b>Revenues</b>				
Annual passholders	\$ 58,529	\$ 63,483	\$ (4,954)	92%
Gate	\$ 277,783	\$ 272,605	\$ 5,179	102%
Group sales	\$ 11,125	\$ 8,750	\$ 2,375	127%
Concessions	\$ 31,386	\$ 30,950	\$ 436	101%
Gift shop	\$ 73,014	\$ 59,881	\$ 13,132	122%
Government support	\$ 325,000	\$ 328,333	\$ (3,333)	99%
Education	\$ 14,606	\$ 10,849	\$ 3,757	135%
WMD net rental	\$ 5,596	\$ 5,667	\$ (71)	99%
Public support	\$ 80,152	\$ 22,675	\$ 57,477	353%
Net event revenues	\$ 391,671	\$ 282,800	\$ 108,871	138%
Zipline	\$ 11,422	\$ 24,501	\$ (13,079)	47%
Train/Carousel	\$ -	\$ 13,544	\$ (13,544)	0%
Other revenues	\$ 29,299	\$ 20,246	\$ 9,053	145%
<b>Total revenues</b>	<b>\$ 1,309,583</b>	<b>\$ 1,144,283</b>	<b>\$ 165,299</b>	<b>114%</b>
<b>Operating expenses</b>				
Payroll	\$ 280,057	\$ 325,512	\$ (45,456)	86%
Animal care	\$ 23,184	\$ 22,976	\$ 208	101%
Facilities repair and maintenance	\$ 20,753	\$ 26,199	\$ (5,445)	79%
Advertising	\$ 17,715	\$ 29,583	\$ (11,869)	60%
Insurance	\$ 69,474	\$ 70,309	\$ (835)	99%
Utilities	\$ 16,203	\$ 16,171	\$ 32	100%
Professional fees	\$ 12,125	\$ 11,583	\$ 542	105%
Employee expenses	\$ 7,677	\$ 7,419	\$ 258	103%
Office expenses/website/credit card fees	\$ 344	\$ 7,065	\$ (6,721)	5%
Project Expenses	\$ 15,968	\$ -	\$ 15,968	
Printing	\$ 297	\$ 1,197	\$ (900)	25%
Supplies	\$ 8,478	\$ 7,733	\$ 745	110%
Other operating expenses	\$ 66,216	\$ 25,904	\$ 40,311	256%
	\$ -			
<b>Total operating expenses</b>	<b>\$ 538,490</b>	<b>\$ 551,653</b>	<b>\$ (13,163)</b>	<b>98%</b>
<b>Net operating income before depreciation</b>	<b>\$ 771,092</b>	<b>\$ 592,630</b>	<b>\$ 178,462</b>	<b>130%</b>

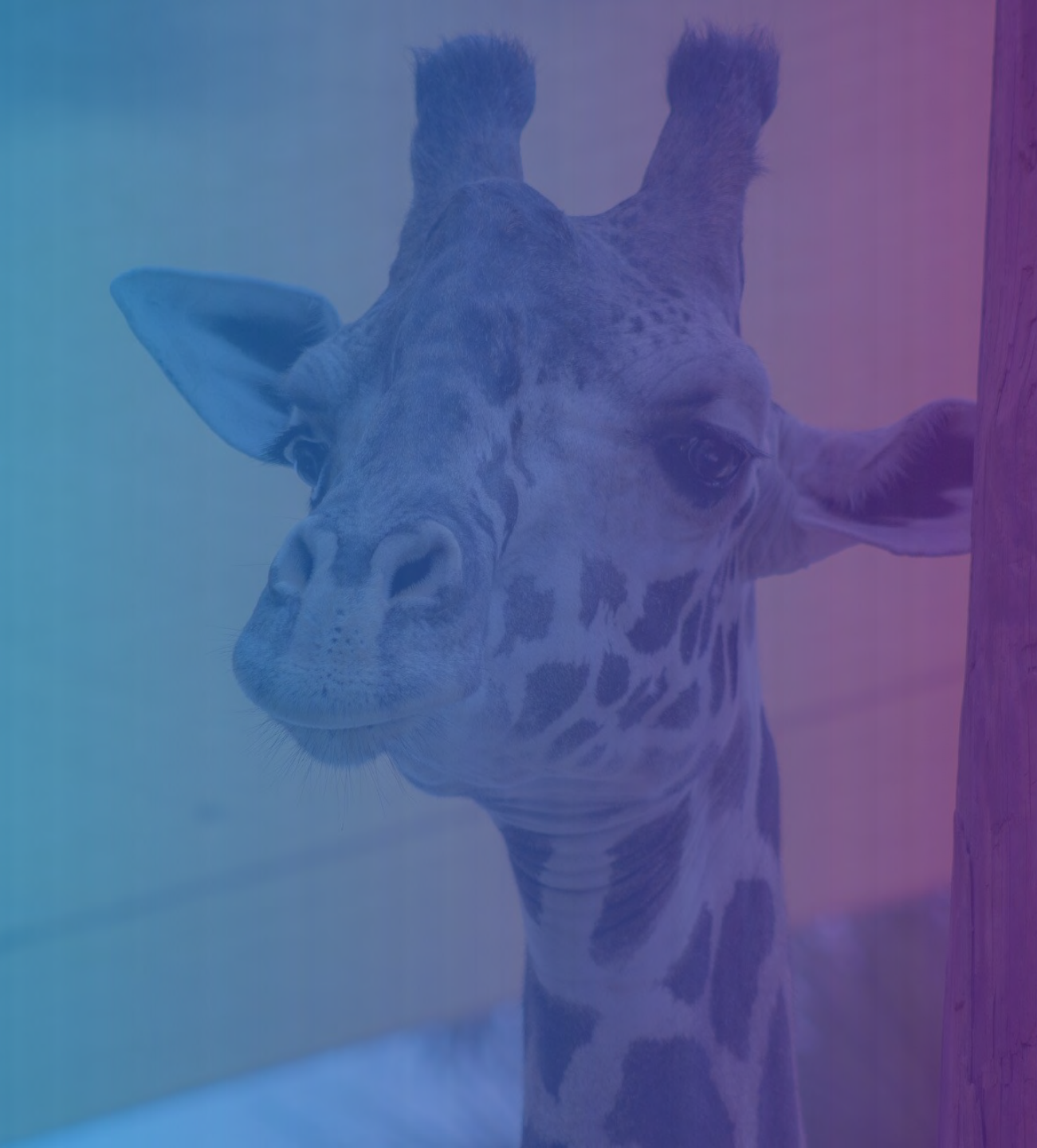


CENTRAL FLORIDA ZOOLOGICAL SOCIETY, INC.  
 UNAUDITED MONTHLY RESULTS AS OF DEC 31, 2022

	Dec-22 Unaudited Actuals YTD	Dec-22 Budget YTD	Actual to Budget	Actual to Budget %
<b>Revenues</b>				
Annual passholders	\$ 351,772	\$ 375,421	\$ (23,649)	94%
Gate	\$ 1,127,061	\$ 1,419,571	\$ (292,510)	79%
Group sales	\$ 49,546	\$ 42,100	\$ 7,446	118%
Concessions	\$ 72,248	\$ 85,058	\$ (12,810)	85%
Gift shop	\$ 176,123	\$ 176,969	\$ (846)	100%
Government support	\$ 806,815	\$ 728,213	\$ 78,602	111%
Education	\$ 115,499	\$ 116,732	\$ (1,233)	99%
WMD net rental	\$ 28,323	\$ 31,000	\$ (2,677)	91%
Public support	\$ 776,442	\$ 366,050	\$ 410,392	212%
Net event revenues	\$ 758,723	\$ 601,200	\$ 157,523	126%
Zipline	\$ 47,277	\$ 106,094	\$ (58,817)	45%
Train/Carousel	\$ (21)	\$ 52,692	\$ (52,713)	0%
Other revenues	\$ 117,468	\$ 131,598	\$ (14,130)	89%
<b>Total revenues</b>	<b>\$ 4,427,277</b>	<b>\$ 4,232,698</b>	<b>\$ 194,579</b>	<b>105%</b>
<b>Operating expenses</b>				
Payroll	\$ 1,792,684	\$ 2,110,406	\$ (317,722)	85%
Animal care	\$ 146,254	\$ 137,858	\$ 8,397	106%
Facilities repair and maintenance	\$ 125,824	\$ 157,291	\$ (31,468)	80%
Advertising	\$ 73,081	\$ 90,565	\$ (17,484)	81%
Insurance	\$ 400,449	\$ 416,554	\$ (16,105)	96%
Utilities	\$ 104,059	\$ 95,413	\$ 8,646	109%
Professional fees	\$ 73,051	\$ 95,500	\$ (22,449)	76%
Employee expenses	\$ 5,905	\$ 10,346	\$ (4,441)	57%
Office expenses/website/credit card fees	\$ 49,536	\$ 51,773	\$ (2,236)	96%
Project Expenses	\$ 62,839	\$ -	\$ 62,839	
Printing	\$ 9,986	\$ 7,180	\$ 2,806	139%
Supplies	\$ 48,665	\$ 46,400	\$ 2,265	105%
Other operating expenses	\$ 327,902	\$ 177,440	\$ 150,462	185%
<b>Total operating expenses</b>	<b>\$ 3,220,235</b>	<b>\$ 3,396,725</b>	<b>\$ (176,490)</b>	<b>95%</b>
<b>Net operating income before depreciation</b>	<b>\$ 1,207,042</b>	<b>\$ 835,973</b>	<b>\$ 371,069</b>	<b>144%</b>

**CENTRAL FLORIDA ZOOLOGICAL SOCIETY, INC.**  
**UNAUDITED MONTHLY RESULTS AS OF DEC 31, 2022**





January TDC Update

[www.centralfloridazoo.org](http://www.centralfloridazoo.org)



# FYTD ATTENDANCE RESULTS

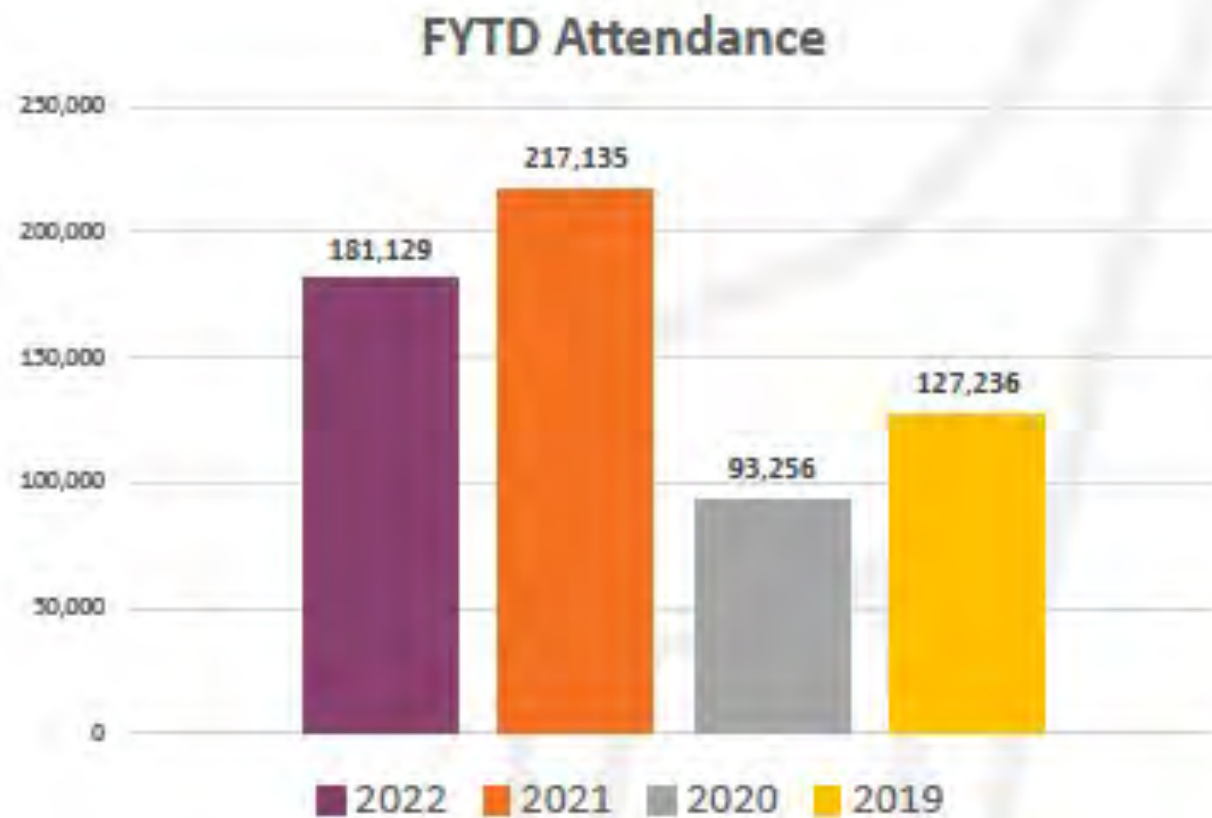
July 1 – December 31, 2022

# 181,129

**VS 2021: 36k / -17%**

**VS 2020: 87.9k / 94%**

**VS 2019: 53.9k / 42%**



# ASIAN LANTERN FESTIVAL

## Event Results

**\$ 1,484,008**  **83,154**

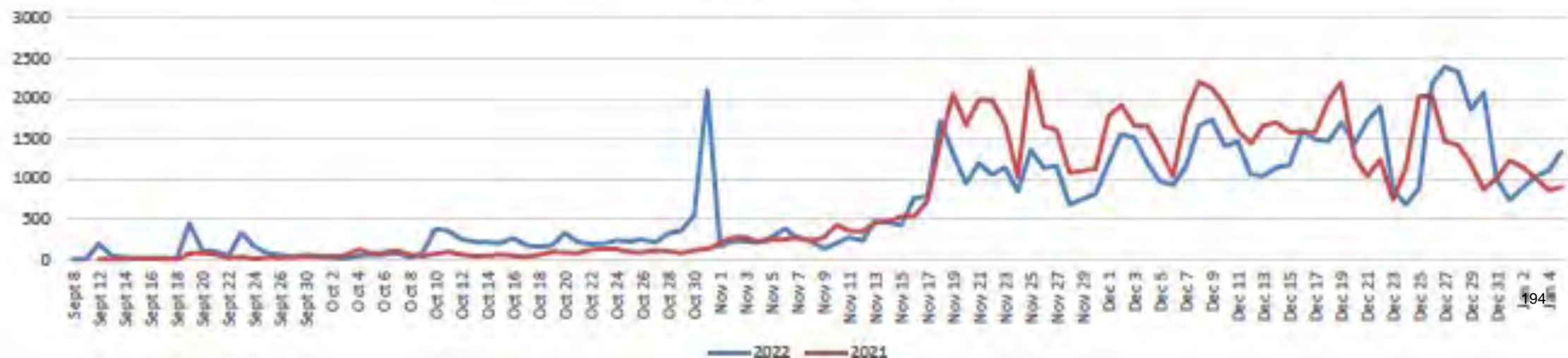


**\$17.85** Per Cap

### Sales Breakdown

Pricing Category	Description	Qty	Mix %	Revenue
Annual Pass	Asian Lantern Festival Age 3+ (AP)	3,806	4.58%	\$56,523.50
	Asian Lantern Festival Age 3+ (AP)	1,497	1.80%	\$25,392.53
	Asian Lantern Festival Child (2 & Under) (AP)	412	0.50%	\$0.00
		<b>5,715</b>	<b>6.87%</b>	<b>\$81,916.03</b>
Non-Pass Holder	Asian Lantern Festival Age 3+	26,803	32.23%	\$565,862.02
	Asian Lantern Festival Age 3+ (AP)	46,408	55.92%	\$707,868.74
	Asian Lantern Festival Age 3+ (AD/G)	281	0.34%	\$4,403.19
	Asian Lantern Festival Age 3+ Group	800	0.72%	\$0,594.00
	Asian Lantern Festival Child (2 & Under)	2,248	2.70%	\$0.00
	Asian Lantern Festival Complimentary (AD)	212	0.25%	\$0.00
	Asian Lantern Festival Complimentary (Dtd)	46	0.06%	\$0.00
	Asian Lantern Festival Preview Comp	359	0.43%	\$0.00
	Asian Lantern Festival Preview Paid	0	0.00%	\$0.00
			<b>77,045</b>	<b>92.65%</b>
Zoo Employees/Volunteer	Asian Lantern Festival Age 3+ (EEV)	394	0.47%	\$4,476.06
		<b>394</b>	<b>0.47%</b>	<b>\$4,476.06</b>
<b>Total</b>		<b>83,154</b>	<b>100.00%</b>	<b>\$1,484,008.04</b>

Sales By Day 2022 vs 2021

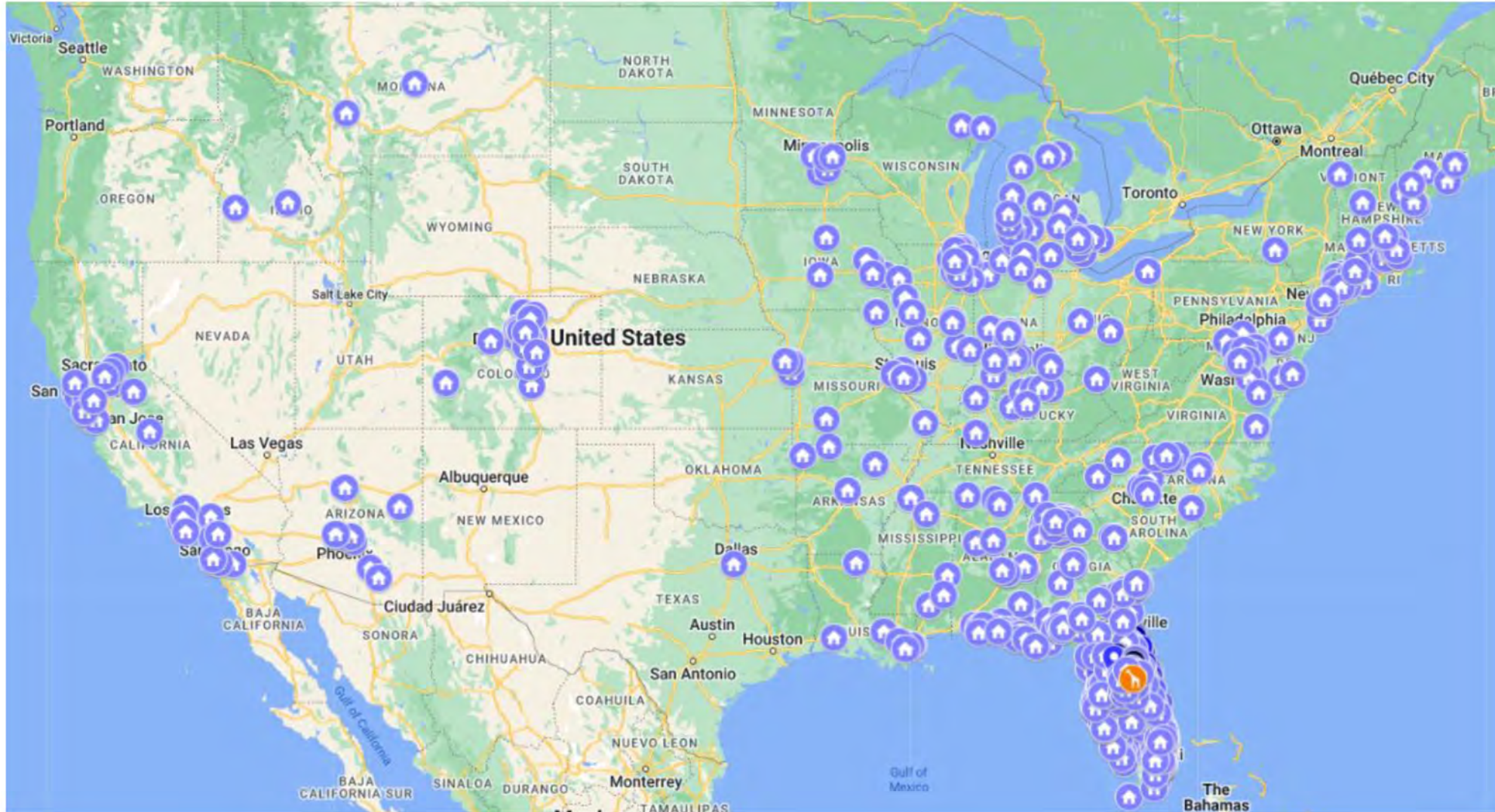


# Asian Lantern 2022-23 Marketing Budget

Media Type/Activity	Background	Cost
Spectrum	TV and direct stream to the zoo's coverage area. This includes extra attention to the most post zip codes. Paid reach of more than 2.5 million	\$37,000
Cox Radio	Radio including streaming product. Paid reach of more than 1 million.	\$17,500
Clear Channel	Billboards in Orange and Seminole County. We have 20 billboards around the region.	\$18,500
Digital Media	Focused on a 50 radius of Central Florida, targeting people that are most likely to visit the festival. The ad program runs October through January 15.	\$15,000
Video	B-roll to help support festival publicity. Sent to Orlando and Drive markets including Jax, Tampa, West Palm and Miami	\$1,350
Signage	Banner Signs, Seminole Boulevard	\$3,500
Joint Agreement with Historic Downtown Sanford	Digital – focus on drive in marketing including key areas such as Tampa Bay and The Villages.	\$5,000
Printing	Flyers, Rack Cards	\$750
Sanford Herald	Print ads	\$1,000
Volusia Beacon	Print ad	\$500
Influencer marketing	Digital	\$1,000
Lake Mary Life	Print	\$950
Outsourced Public Relations and earned media program	All types of media with special focus on broadcast, regional print, and social media influencers. More than 80 placements to date.	\$12,000
Inhouse marketing	Web improvement, media and influencer coordination	2,500
Email Marketing	More than 15 e-blasts, that reach up to 70,000 zoo fans and ticket holders. Budget covers the extra emails in our database for ALF into the Wild.	\$2500
Web updates	Improve web performance on mobile site and provide better user path to ticket page	\$1000
<b>Total</b>		<b>\$119,200</b>



# 2023 Asian Lantern Festival Zip Codes



United States View

LEGEND

- 1 - 19 (1740)
- 20 - 37 (76)
- 38 - 58 (39)
- 59 - 88 (26)
- 89 - 129 (25)
- 130 - 203 (18)
- 206 - 295 (20)
- 299 - 482 (19)
- 502 - 997 (19)
- 1008 - 4724 (18)



# Upcoming Events

**INDIGO  
BLUEGRASS  
BBQ**

SATURDAY, FEBRUARY 11, 2023  
12 PM TO 4 PM  
EUSTIS, FL

*DETAILS AND TICKET PURCHASE LINK COMING SOON*  
TICKETS \$30 PER PERSON/\$50 PER COUPLE

**HIPPIITY HOP  
ADVENTURE**

presented by

**VyStar**  
Credit Union



PRESENTED BY WAYNE  
DENSCH, INC.

## BREWS AROUND THE ZOO

APRIL 8, 2023

ADULTS 21+ ONLY

BEER STATIONS WITH OVER 30 DIFFERENT CRAFT BEERS

FOOD AVAILABLE FOR PURCHASE

LEARN MORE & BUY TICKETS AT [WWW.CENTRALFLORIDAZOO.ORG/BREWS](http://WWW.CENTRALFLORIDAZOO.ORG/BREWS)





# Thank You



# evok Reporting

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IDEAS  
WORKS  
RESULTS

Seminole CVB  
December 2022

## Executive Summary

The data reflected in this report is based on December 1st to December 31st, 2022.

### (DON) Search Engine Optimization (SEO)

**Keyword Volume** increased by 3.19% MoM.

*This metric is the number of keywords bringing users to the website via Google's top 100 organic search results.*

**Search Volume** decreased by 9% MoM.

*This metric is the number of potential searches for ranking keywords.*

**New Backlinks** 272,317.

*This metric is the total number of new links leading to your website.*

**New Referring Domains** 228.

*This metric is the total number of new websites with at least one link pointing to your website.*

**Organic Website Sessions** decreased 46.3% MoM and decreased 38.7% YoY.

*Website sessions are any user that interacted with the website and stayed on the page for longer than 10 seconds.*

**New Organic Website Sessions** decreased 46.8% MoM and decreased 36% YoY.

*New Sessions are users that have not previously visited the website within the past 90 days.*

#### Top 5 Non-Branded Search Terms by Volume

- red hot and boom 2022
- yummy house orlando
- asian lantern festival orlando
- aiguille rock climbing center
- wekiva island photos

#### Top 5 Non-Branded Search Terms by Growth

- paddlewheel cruise (+25)
- winter springs orlando (+15)
- wekive island (+12)
- sanford Florida boat tours (+10)
- free orlando travel guides by mail (+9)

● There were 2 potential Google updates during December that contributed to changes in rankings for everyone. This potentially affected DON via slight decrease in Search volume and a shift in keyword volume. The decrease in organic web sessions & new web sessions indicate a change in search habits for December. This however is not linked to a loss in keywords as December 2022 saw an increased when compared to December 2021. There was a decrease in positioning for high volume generic keywords like [orlando restaurants] and [what to do in Orlando], both identifying opportunities for future content.

#### Recommendation:

We recommend focusing content on [upcoming events], [what to do in orlando] and [orlando restaurants]. There are variations of these terms with high search volumes and all are opportunities to link to previous content in the page as well as create new content that helps push terms to the first page increasing overall rankings and organic web sessions.

### (PON) Search Engine Optimization (SEO)

**Keyword Volume** decreased by 5.79% MoM.

*This metric is the number of keywords bringing users to the website via Google's top 100 organic search results.*

**Search Volume** increased by 3.57% MoM.

*This metric is the number of potential searches for ranking keywords.*

**New Backlinks** 294,583.

*This metric is the total number of new links leading to your website.*

**New Referring Domains** 218.

*This metric is the total number of new websites with at least one link pointing to your website.*

**Organic Website Sessions** had no change MoM and YoY.

*Website sessions are any user that interacted with the website and stayed on the page for longer than 10 seconds.*

**New Organic Website Sessions** had no change MoM and YoY.

*New Sessions are users that have not previously visited the website within the past 90 days.*

#### Top 5 Non-Branded Search Terms by Volume

- boombah sports complex
- red bug lake park
- sanlando park
- central winds park
- sylvan lake park

#### Top 5 Non-Branded Search Terms by Growth

- sunshine qualifier 2023 (+82)
- complex near me (+28)
- perfect game boombah sanford (+15)
- sports at the beach field map (+3)
- orlando sports complex (+3)

#### Recommendations:

We recommend to continue focusing content on the sports complex/sports center, as well as softball and baseball fields to match peoples search queries. Updating for future events is also recommended as we've starting seeing an influx of search queries for event related terms. There were 2 potential Google updates during December that contributed to changes in rankings for everyone. This affected PON via slight decrease in Keywords volume. Focusing upcoming content on our recommendations will help start boosting rankings for 2023.

The backlink recommendations from the two previous month stay in effect, as December saw a greater increase in new backlinks and new referring domains for both websites. The ratio difference between new backlinks vs referring domains is also larger, indicating a potential high amount of spam pages. We continue to research ways to block it form a development end, but as recommended last month, the quickest way to fix it would be to migrate to the WordPress versions of the sites.



## Executive Summary

The data reflected in this report is based on December 1st to December 31st, 2022.

### Pay-Per-Click (PPC)

Search PPC overall is down 7.32% in impressions MoM and up 2.00% in clicks MoM. The clicks were up MoM because CPCs decreased 0.59% overall MoM as keywords were less competitive.

The Leisure(Do) campaign is down 10.11% in impressions MoM from 53,538 in November to 48,126 in December and up 4.60% in clicks MoM, from 4,912 in November to 5,138 in December. The CTR increased 16.36% MoM from 9.17% CTR in November to 10.68% CTR in December.

The Parks and Food Ad Groups in the Leisure campaign have the most clicks, with 2,347 clicks for Parks and 1,903 for Food. There were 5,138 clicks in all of the Leisure campaign ad groups.

The Leisure(Do) Skippable CPV Youtube campaign had 14,207 impressions, up 17.07% MoM, and 8,525 views, up 15.75% MoM. The view rate is 60.01%, above the industry avg. of 15%. The Leisure(Do) Non-Skippable CPM Youtube campaign had 17,418 impressions/views, up 5.98% MoM.

The Sports(Play) campaign is up 1.39% in impressions MoM to 17,337 impressions and down 4.12% in clicks MoM to 2,000 clicks. The CTR was down 5.44% MoM with an 11.54% CTR and the CPC increased 4.98% MoM to \$0.74 Avg. CPC. The Sports, Soccer, Baseball, and Football Ad Groups had the most clicks for the Sports(Play) campaign, with 2,000 total clicks in December.

The Sports(Play) Skippable CPV Youtube campaign had 23,216 impressions, up 7.70% MoM, 13,598 views, up 9.87% MoM. The view rate is 58.57%, above the industry avg. of 15%. The Sports(Play) Non-Skippable CPM Youtube campaign had 38,422 impressions/views, up, 6.28% MoM, and 11 clicks.

Top keywords include "orlando restaurants", "parks in Orlando", and "orlando hiking trails" for the Leisure campaign, and "sports event", "Soccer Tournament" and "Soccer Event" for the Sports(Play) campaign.

#### **Recommendation:**

*Metrics are at or above industry standards, so none at this time, but we will continue to monitor trends and make any tactical adjustments as necessary.*

## Social Media

### Do Orlando North Facebook and Instagram

In December, we continued running the **Website traffic campaign** with the Influencers' creatives and the **Booking campaign**.

For the Booking campaign, link clicks increased by 17.42%, and CTR increased by 5.21%. This is due to optimizations made to the target audience as a way to fight CPM. We recommend updating the creative with new videos and reels, as we have been running the same creative for more than 5 months.

For the Website Traffic campaign, link clicks increased by 3.20%, and CTR increased by 15.77%. This is due to optimizations made to the target audience as a way to fight CPM. Taryn's video is the ad with the most link clicks with 1,556 link clicks. Chantel's carousel ad is the ad with the least link clicks with 476 link clicks. For the upcoming month, we will turn off the two least performing ads as a way to optimize link clicks. Our overall CPC is still below the average industry CPC of \$0.63, with a \$0.25 CPC. Our overall CTR is above the average industry CTR of 0.90%, with a 3.00% CTR.

### Pinterest

In December, the Leisure campaign had a total of 840 link clicks, a 26.9% increase from the previous month. CTR increased by 3.97%. According to third party reports, the average CPC on Pinterest is \$1.5. Our CPC is still below that with a \$0.56 CPC. The campaign is starting to show signs of creative fatigue. We recommend updating the creative with new videos.

#### **Recommendation**

*We recommend updating the Booking campaign's creative with new videos highlighting seasonal events.*

*For Pinterest, we highly recommend updating the creative for both campaigns. It would be ideal to promote seasonal activities and new influencers' itineraries for the Leisure campaign while highlighting seasonal sports for the Sports campaign.*

### Play Orlando North

In December, our overall link clicks increased by 20.52% and CTR increased by 10.69% due to optimization made to the target audience. According to third-party reporting, the average industry CPC for the fitness industry is \$1.90, and the CTR is 1.01%. Our CPC is below the average with a \$0.32 CPC. Our CTR is still above average, with a 4.51% CTR. We did not run any promoted posts since we reallocated that budget for the Do Orlando's Website Traffic campaign.

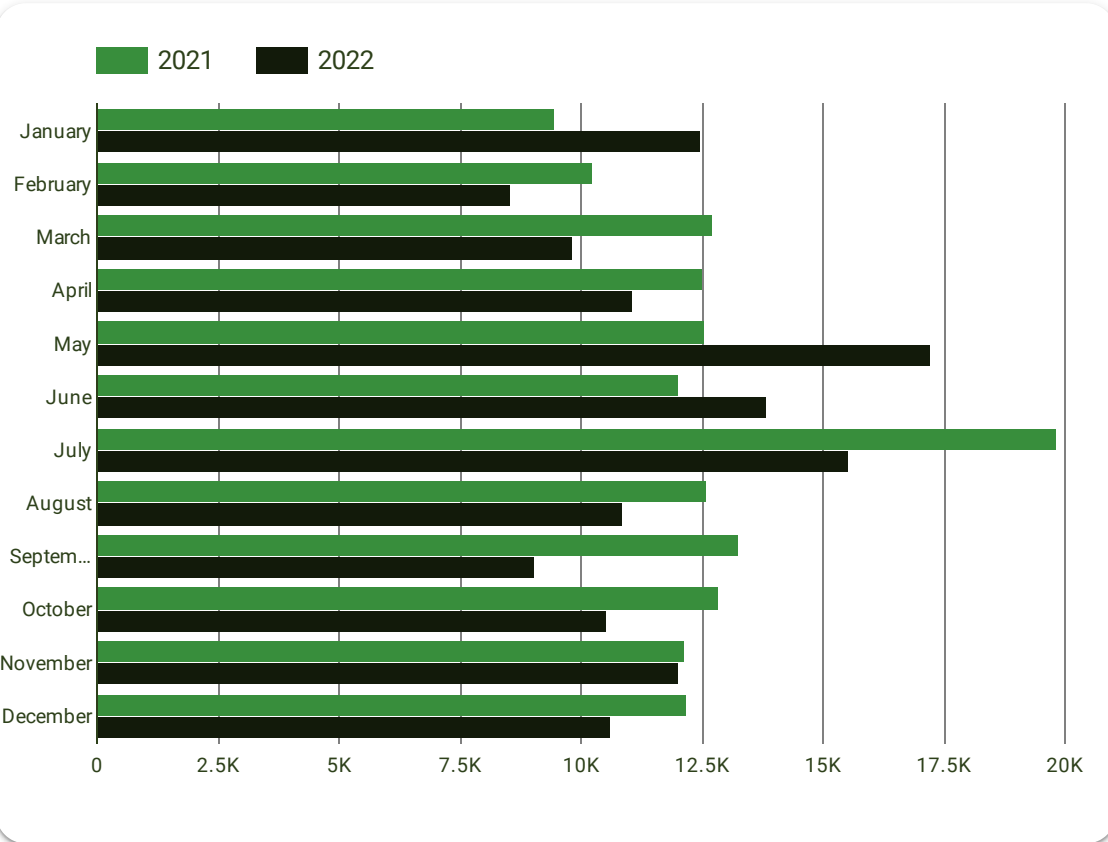
### Pinterest

In December, the Sport campaign had a 351 link clicks, an increase by 53.3%. Our CTR increased by 27.4%. According to third party reports, the average CPC on Pinterest is \$1.5. Our CPC is still below the average with a \$1.05 CPC.



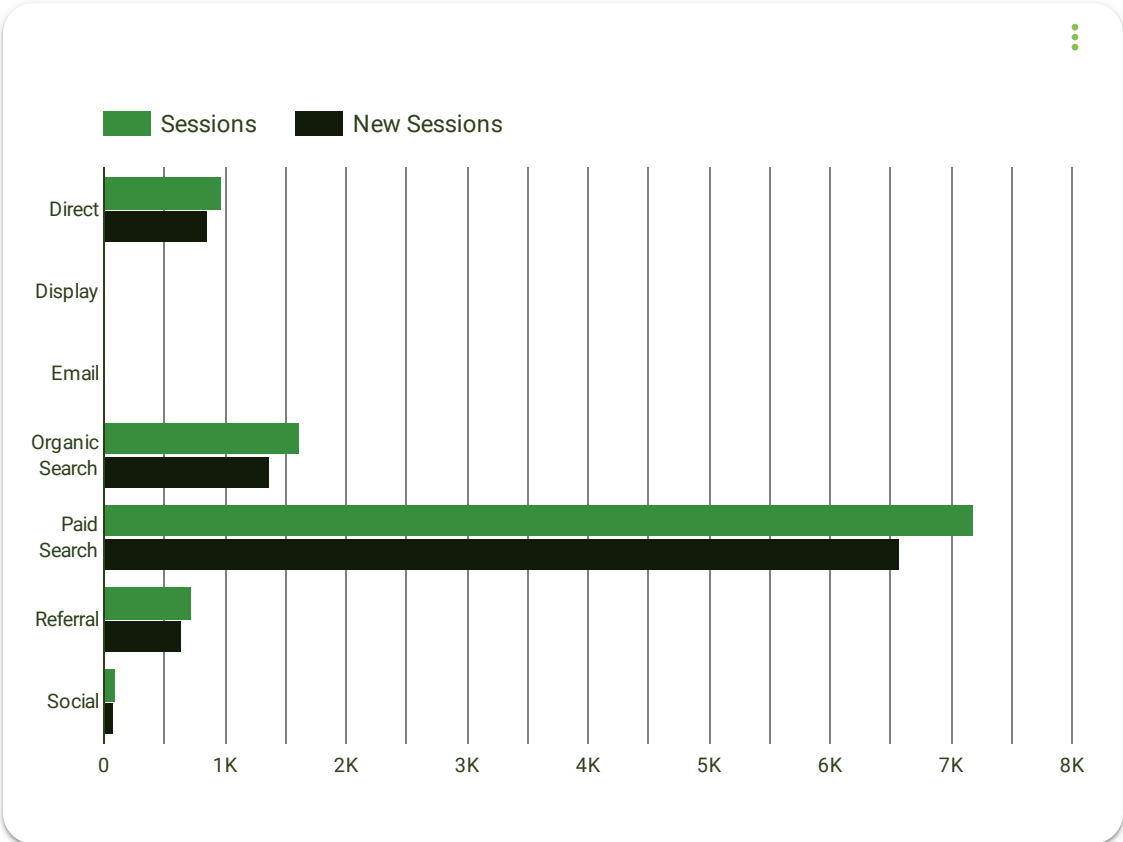
### Traffic Trends: Total Sessions

Objective: Increase New Sessions YoY



### Traffic by Channel: Sessions & New Sessions

Objective: Comparison of Sessions and New Sessions by Channel



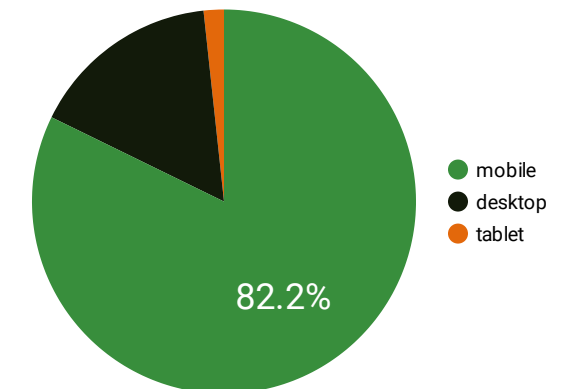
### Traffic by Source: Sessions and Engagement Metrics

Objective: Comparison YoY of New Sessions, Sessions and Engagement by Traffic Source

Source / Medium	New Sessions	% Δ	Sessions	Bounce Rate	Avg. Session
1. google / cpc	4,712	-25.7% ↓	5,080	82.93%	00:00:31
2. facebook / cpc	1,832	561.4% ↑	2,066	95.64%	00:00:02
3. google / organic	1,321	-36.6% ↓	1,555	76.66%	00:00:44
4. (direct) / (none)	857	-6.8% ↓	983	83.32%	00:00:33
5. 192.0.2.1 / referral	279	-	287	99.65%	00:00:00

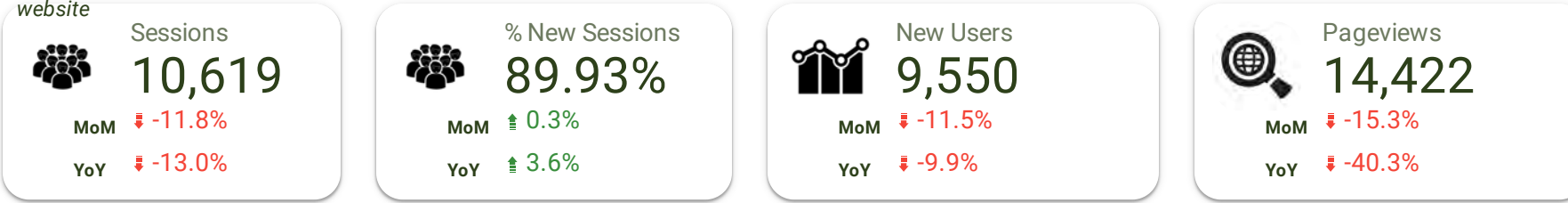
### Traffic by Device: Total Sessions

Objective: Comparison of Traffic by Device



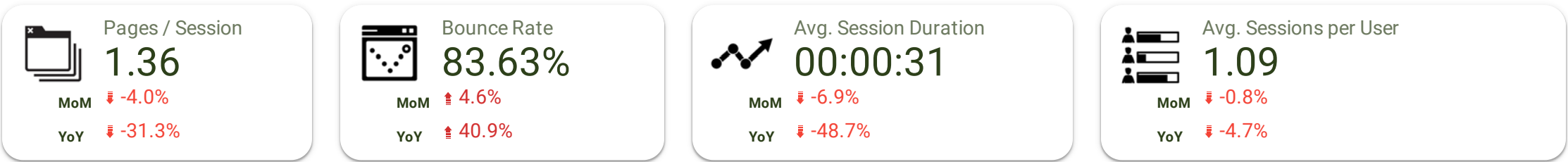
### Website Score Cards: Site Traffic Metrics

Objective: Increase Traffic Metrics to gain more visitors to website



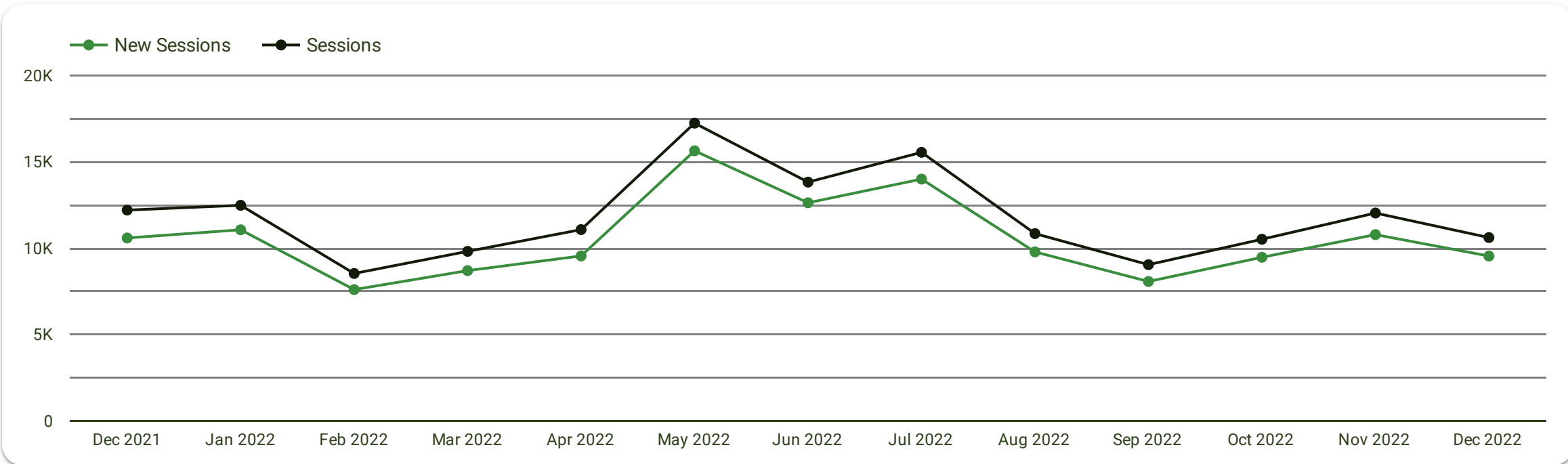
### Website Score Cards: Site Engagement Metrics

Objective: Increase Engagement Metrics to deliver a better user experience to website visitors



### Top Traffic Metrics: 12-Month Running Trend

Objective: Shows Yearly Growth Trend of New Sessions & Total Sessions



### Top Landing Pages: Traffic and Engagement Metrics

Objective: Increase Sessions, Pages/Session and Session Duration while lowering Bounce Rates

Landing Page	New Users	% Δ	Sessions	Bounce Rate	Pages / Session	Avg. Session Duration
/things-to-do/nature-and-outdoors/default.aspx	2,097	434.9% ↑	2,235	77.67%	1.41	00:00:46
/things-to-do/restaurants/default.aspx	1,715	138.9% ↑	1,807	84.12%	1.29	00:00:20
/blog/post/3-top-hidden-nature-trails-in-orlando-north/default.aspx	659	180.4% ↑	740	94.32%	1.08	00:00:17
/default.aspx	515	-18.0% ↓	624	63.94%	2.11	00:01:01
/itineraries/default.aspx	435	-	465	93.33%	1.16	00:00:14
/blog/post/most-haunted-places-orlando-north-seminole-county-has-everything-you-need-to-know	220	-7.6% ↓	240	95%	1.05	00:00:23
/calendar/event/lake-mary-new-years-eve-block-party	195	34.5% ↑	207	72.95%	1.53	00:00:28
/calendar/event/asian-lantern-festival-into-the-wild-2022	134	-	160	76.25%	1.53	00:00:51
/blog/post/orlando-north-seminole-county-has-everything-you-need-to-know	123	392.0% ↑	126	96.83%	1.04	00:00:02
/things-to-do/default.aspx	94	-21.7% ↓	100	62%	1.92	00:01:29

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### Geographical Breakdown of Audience: Region & City based on Geolocation IP

Objective: Increase demographic insights of future visitors to the website

Region	City	New Users	% Δ	Sessions	Bounce Rate	Pages / Session	Avg. Session Duration
Georgia	Atlanta	811	388.6% ↑	897	86.62%	1.25	00:00:29
Florida	Orlando	684	-61.8% ↓	767	82.27%	1.33	00:00:29
Florida	Sanford	414	24.3% ↑	504	81.15%	1.69	00:01:04
(not set)	(not set)	296	144.6% ↑	304	92.76%	1.1	00:00:06
Florida	Miami	262	62.7% ↑	291	85.57%	1.33	00:00:23

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Dec 1, 2022 - Dec 31, 2022



## Google Search Console: Organic Traffic Queries Compared MoM

Objective: Show Organic Search Traffic by Search Query

Organic Search Term	Impressions	% Δ	Clicks ▾	% Δ	Site CTR	% Δ	Average Position
1. lake mary community center	412	5.6% ↑	42	180.0% ↑	10.19%	165.0% ↑	3.9
2. lake mary new year's eve block party	55	-	18	-	32.73%	-	2.31
3. haunted places in orlando	111	-19.0% ↓	15	-59.5% ↓	13.51%	-50.0% ↓	3.03
4. asian lantern festival orlando	5,001	4.7% ↑	14	-93.5% ↓	0.28%	-93.8% ↓	8.28
5. facts about the seminole tribe	135	0.0%	14	40.0% ↑	10.37%	40.0% ↑	3.66
6. orlando north	196	-16.6% ↓	13	-27.8% ↓	6.63%	-13.4% ↓	2.11
7. interesting facts about the seminole tribe	98	-24.6% ↓	12	-14.3% ↓	12.24%	13.7% ↑	1.41
8. 10 interesting facts about the seminole tribe	73	-43.0% ↓	12	-33.3% ↓	16.44%	16.9% ↑	1.4
9. fun facts about the seminole tribe	73	-2.7% ↓	11	-21.4% ↓	15.07%	-19.3% ↓	1.49
10. seminole facts	132	1.5% ↑	10	100.0% ↑	7.58%	97.0% ↑	1.87

1 - 10 / 10383 &lt; &gt;

## Google Search Console: Organic Traffic Queries Compared YoY

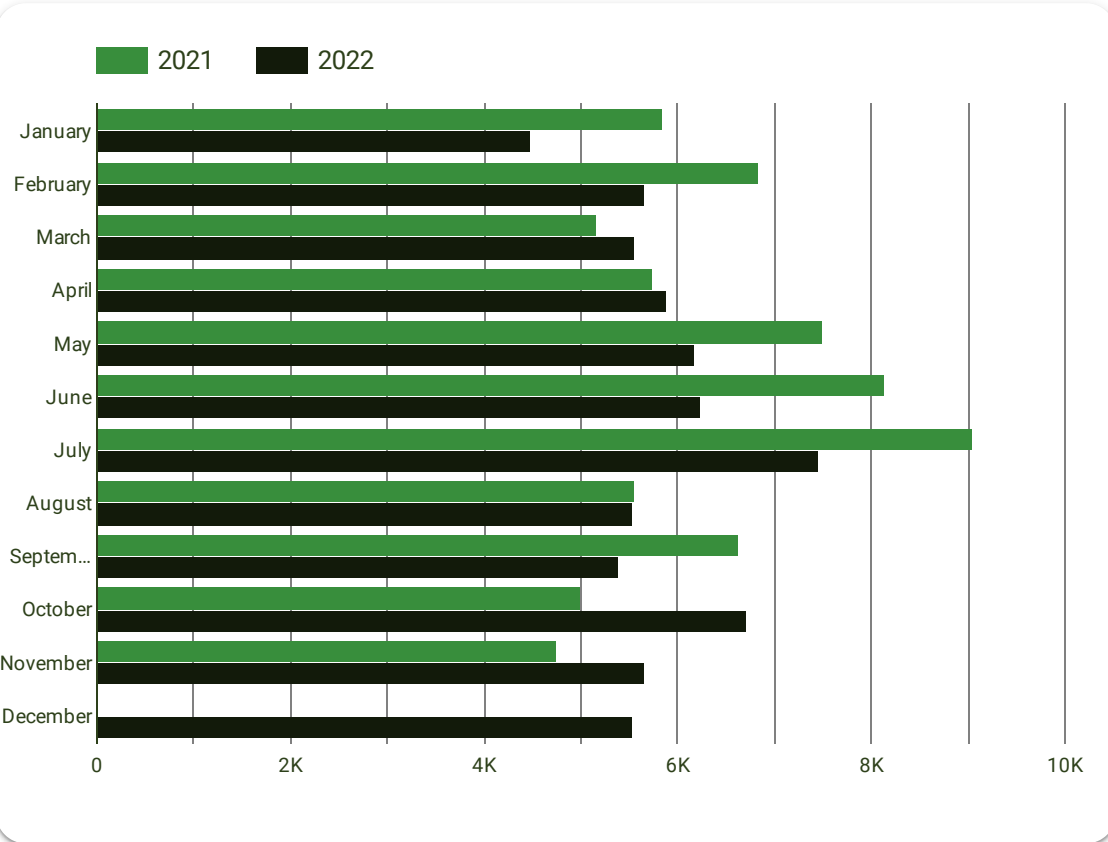
Objective: Show Organic Search Traffic by Search Query

Organic Search Term	Impressions	% Δ	Clicks ▾	% Δ	Site CTR	% Δ	Average Position
1. lake mary community center	412	35.1% ↑	42	600.0% ↑	10.19%	418.2% ↑	3.9
2. lake mary new year's eve block party	55	-32.1% ↓	18	-5.3% ↓	32.73%	39.5% ↑	2.31
3. haunted places in orlando	111	-2.6% ↓	15	-64.3% ↓	13.51%	-63.3% ↓	3.03
4. facts about the seminole tribe	135	-	14	-	10.37%	-	3.66
5. asian lantern festival orlando	5,001	500,000.0% ↑	14	-	0.28%	-	8.28
6. orlando north	196	-8.8% ↓	13	-45.8% ↓	6.63%	-40.6% ↓	2.11
7. interesting facts about the seminole tribe	98	-	12	-	12.24%	-	1.41
8. 10 interesting facts about the seminole tribe	73	-	12	-	16.44%	-	1.4
9. fun facts about the seminole tribe	73	-	11	-	15.07%	-	1.49
10. seminole facts	132	-	10	-	7.58%	-	1.87

1 - 10 / 10383  
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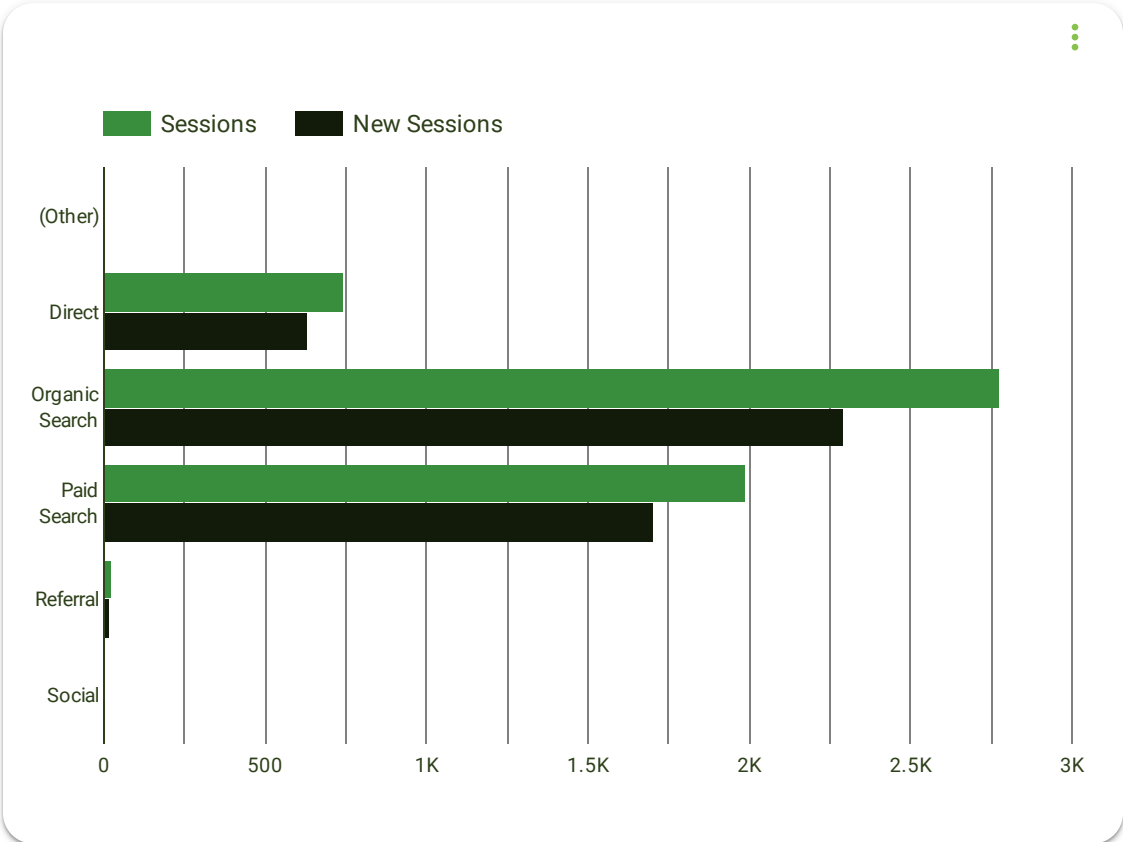
### Traffic Trends: Total Sessions

Objective: Increase New Sessions YoY



### Traffic by Channel: Sessions & New Sessions

Objective: Comparison of Sessions and New Sessions by Channel



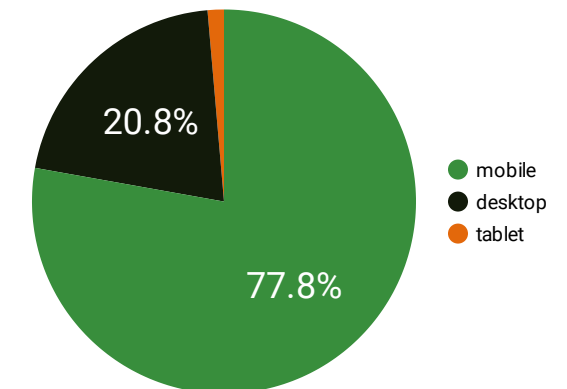
### Traffic by Source: Sessions and Engagement Metrics


Objective: Comparison of New Sessions, Sessions and Engagement by Traffic Source

Source / Medium	New Sessions	% Δ	Sessions	Bounce Rate	Avg. Session
1. google / organic	2,075	-	2,526	60.49%	00:01:16
2. google / cpc	1,410	-	1,632	85.72%	00:00:21
3. (direct) / (none)	631	12,520...	745	75.3%	00:00:52
4. facebook / cpc	281	-	337	98.22%	00:00:00
5. bing / organic	112	-	119	39.5%	00:02:08

### Traffic by Device: New Sessions

Objective: Comparison of Traffic by Device



 [See details](#)


Dec 1, 2022 - Dec 31, 2022


Channel Group


## Insights


### Website Score Cards: Site Traffic Metrics

Objective: Increase Traffic Metrics to gain more visitors to website

 Sessions  
**5,541**  
MoM ↓ -2.0%  
YoY ↑ 50,272.7%


 % New Sessions  
**84.01%**  
MoM ↓ -1.0%  
YoY ↑ 54.0%


 New Users  
**4,655**  
MoM ↓ -2.9%  
YoY ↑ 77,483.3%


 Pageviews  
**9,118**  
MoM ↑ 0.3%  
YoY ↑ 82,790.9%


### Website Score Cards: Site Engagement Metrics

Objective: Increase Engagement Metrics to deliver a better user experience to website visitors

 Pages / Session  
**1.65**  
MoM ↑ 2.4%  
YoY ↑ 64.6%

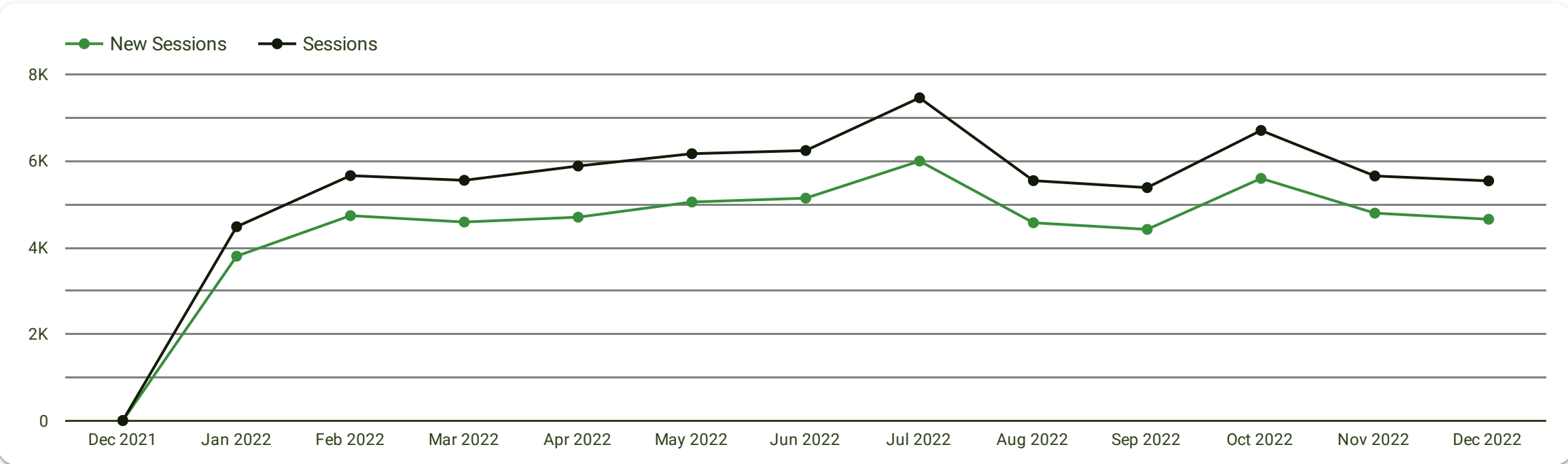
 Bounce Rate  
**72.01%**  
MoM ↓ -1.2%  
YoY ↓ -28.0%

 Avg. Session Duration  
**00:00:53**  
MoM ↑ 1.9%  
YoY ↑ N/A

 Avg. Sessions per User  
**1.17**  
MoM ↑ 0.9%  
YoY ↓ -25.7%

### Top Traffic Metrics: 12-Month Running Trend

Objective: Shows Yearly Growth Trend of New Sessions & Total Sessions





### Top Landing Pages: Traffic and Engagement Metrics

Objective: Increase Sessions, Pages/Session and Session Duration while lowering Bounce Rates

Landing Page	New Users	% Δ	Sessions	% Δ	Bounce Rate	% Δ	Pages / Session	% Δ	Avg. Session Duration	% Δ
/facilities/details/boo...	1,966	6.4% ↑	2,385	6.8% ↑	59.33%	2.2% ↑	1.96	-1.5% ↓	00:01:18	-10.3% ↓
/facilities	1,105	-0.5% ↓	1,250	2.5% ↑	89.12%	1.0% ↑	1.21	-4.4% ↓	00:00:25	38.0% ↑
/events	351	0.9% ↑	417	-2.6% ↓	67.87%	-3.2% ↓	1.63	10.6% ↑	00:00:27	64.9% ↑
/facilities/details/sem...	173	68.0% ↑	196	70.4% ↑	62.76%	-9.8% ↓	1.92	24.3% ↑	00:01:48	51.8% ↑
/	148	5.7% ↑	172	2.4% ↑	78.49%	3.0% ↑	1.63	16.3% ↑	00:00:35	6.6% ↑
/facilities/details/boo...	54	22.7% ↑	62	26.5% ↑	61.29%	7.3% ↑	2.13	1.3% ↑	00:01:22	6.3% ↑
/facilities/details/lake...	44	-29.0% ↓	47	-27.7% ↓	87.23%	7.0% ↑	1.13	-15.7% ↓	00:00:41	-27.7% ↓
/facilities/details/lake...	40	-32.2% ↓	40	-34.4% ↓	95%	11.4% ↑	1.1	-6.8% ↓	00:00:28	-53.7% ↓
/facilities/details/sylv...	39	39.3% ↑	43	26.5% ↑	65.12%	-3.7% ↓	1.91	2.9% ↑	00:00:57	-64.4% ↓
/sports	38	-33.3% ↓	68	-27.7% ↓	58.82%	-9.4% ↓	1.69	-4.2% ↓	00:00:17	-25.8% ↓

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### Geographical Breakdown of Audience: Region & City based on Geolocation IP

Objective: Increase demographic insights of future visitors to the website

Region	City	New Users	% Δ	Sessions	Bounce Rate	Pages / Session	Avg. Session Duration
Georgia	Atlanta	482	-0.4% ↓	577	71.4%	1.69	00:00:42
Florida	Orlando	256	-4.5% ↓	314	73.57%	1.58	00:00:51
Florida	Miami	144	11.6% ↑	182	75.27%	1.59	00:00:25
New York	New York	90	25.0% ↑	106	69.81%	1.53	00:00:38
Florida	(not set)	87	16.0% ↑	105	71.43%	1.5	00:00:45

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Amount spent  
**\$1,549.57**  
↓ -3.1%

Impressions  
**198,242**  
↓ -7.8%

CPM  
**\$7.82**  
↑ 5.1%

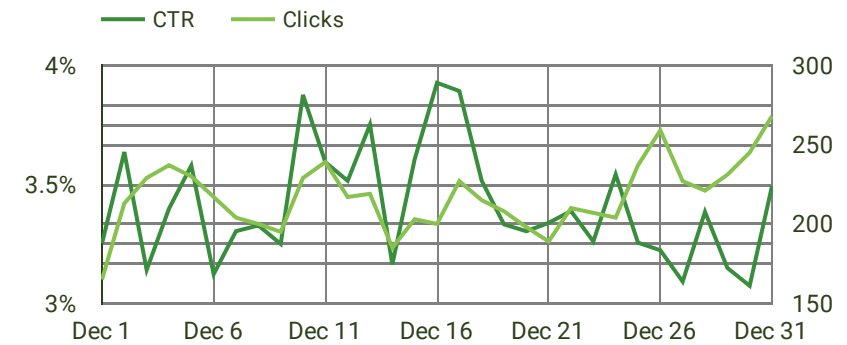
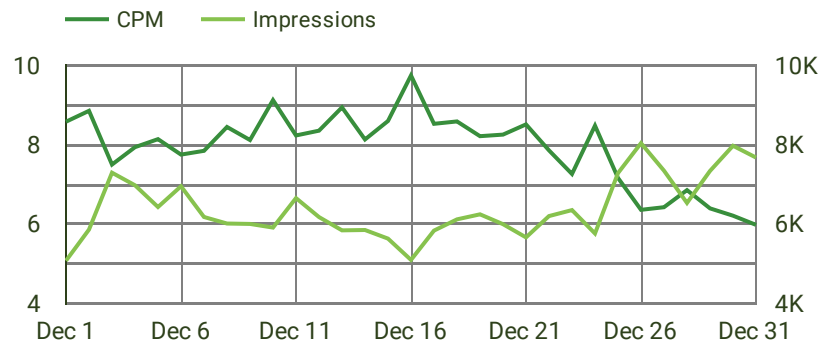
Link clicks  
**6,214**  
↑ 5.8%

CPC  
**\$0.25**  
↓ -8.4%

CTR (link click-through rate)  
**3.13%**  
↑ 14.7%



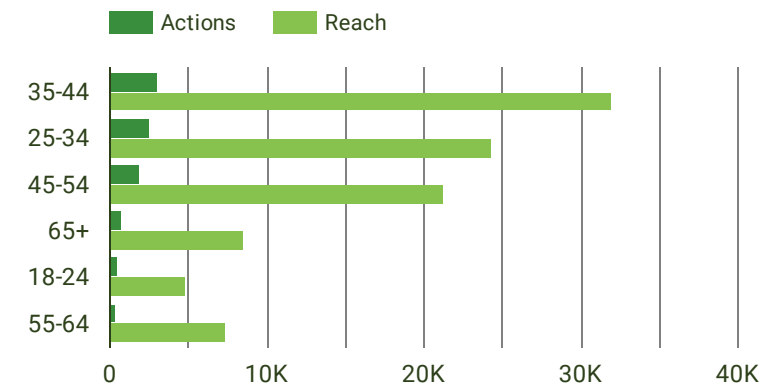
Reach  
**98,373**  
↓ -18.1%



Top Campaigns

Ads: by Age - (Actions and Reach)

Campaign na...	Cost	CPC (link)	Reach	Imp. ▾	CTR (link clic...	Link clicks
2022 - Website Traffic	\$1.25K	0.3	80.3K	165.6K	3%	5K
2022 - Hotel Booking LC	\$299.57	0.2	18K	32.7K	3.8%	1.2K





Amount spent  
**\$556.38**  
↑ 11.3%

Impressions  
**39,078**  
↑ 8.9%

CPM  
**\$14.24**  
↑ 2.2%

Link clicks  
**1,762**  
↑ 20.5%

CPC  
**\$0.32**  
↓ -7.7%

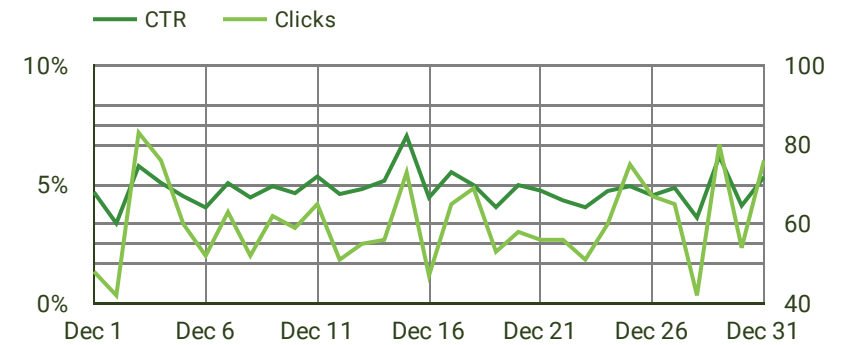
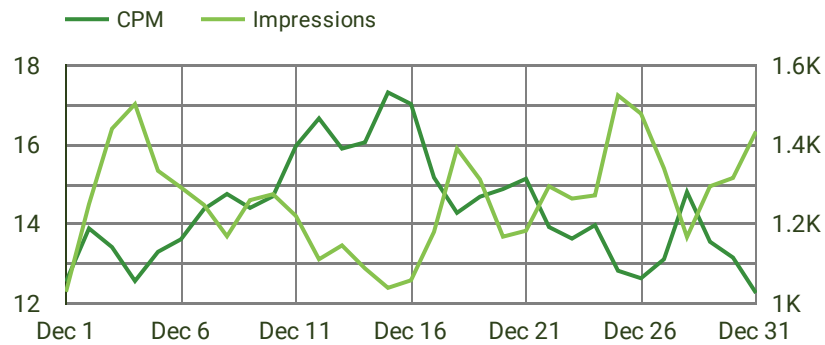
CTR (link click-through rate)  
**4.51%**  
↑ 10.7%



Impressions  
**39,078**  
↑ 8.9%



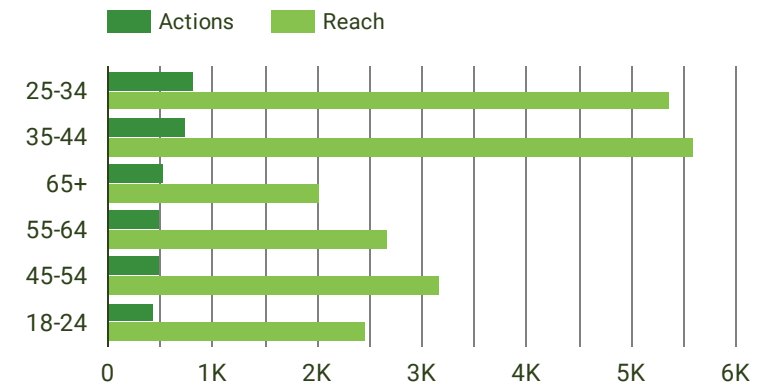
Reach  
**21,316**  
↓ -3.7%



Top Campaigns

Ads: by Age - (Actions and Reach)

Campaign na...	Cost	CPC (link)	Reach	Imp. ▾	CTR (link clic...	Link clicks
2022 - Website Traffic	\$556.38	0.3	21.3K	39.1K	4.51%	1.8K





Campaign Name	Media Type	Ad Type	Impressions	Clicks	CTR	CPC	CPM	CPR
1. Web Traffic Sports December	Pinterest	Digital	53,960	351	0.65%	\$1.05	\$6.86	\$1.05
2. Web Traffic Leisure December (Videos)	Pinterest	Digital	53,490	840	1.57%	\$0.56	\$8.79	\$0.56

Grand total      107,450      1,191      1.11%      \$0.71      \$7.82      \$0.71

### Google AdWords: Monthly Summary of All PPC Metrics

Objective: Increase Impressions, Clicks and CTR. Lower Cost and CPC.

Impressions  
**65,463**  
↓ -7.32%



Clicks  
**7,138**  
↑ 2.00%



CTR  
**10.90%**  
↑ 10.06%



Cost  
**\$3,093.87**  
↑ 1.40%



CPC  
**\$0.43**  
↓ -0.59%



### Google AdWords: Summary of Search Campaigns this Month

Objective: Increase Impressions, Clicks and CTR.

Campaign	Impressions	Clicks	CTR
1. Do Orlando - Leisure	48,126	5,138	10.68%
2. Play Orlando - Sports	17,337	2,000	11.54%

### Google AdWords: Summary of Search Campaigns this Month

Objective: Summarize Impressions, Clicks and CTR by Ad Group

Ad type	Campaign name	Ad group name	Impressions	Clicks	CTR
1. Responsive search ad	Do Orlando - Leisure	Parks	21,623	2,347	10.85%
2. Responsive search ad	Do Orlando - Leisure	FOOD	19,873	1,903	9.58%
3. Responsive search ad	Play Orlando - Sports	Sports	5,150	672	13.05%
4. Responsive search ad	Do Orlando - Leisure	Nature Trails	3,063	649	21.19%
5. Responsive search ad	Play Orlando - Sports	Soccer	4,360	550	12.61%
6. Responsive search ad	Play Orlando - Sports	Baseball	3,068	338	11.02%
7. Responsive search ad	Play Orlando - Sports	Football	3,034	295	9.72%
8. Responsive search ad	Do Orlando - Leisure	Family	1,920	134	6.98%
9. Responsive search ad	Do Orlando - Leisure	Things to Do/Planning MS	1,562	100	6.4%
10. Responsive search ad	Play Orlando - Sports	Tennis	879	81	9.22%

### Google Ads: Summary of All Youtube Metrics

Objective: Increase Impressions, Clicks and CTR. Lower Cost and CPC.



### Google Ads: Summary of Do Orlando North Youtube Campaigns

Objective: Increase Impressions, Clicks and CTR.

Campaign	Impressions	Clicks	CTR	Video views	Video watch rate (%)
1. Do 15 Sec Non-Skippable CPM - Youtube	17,418	5	0.03%	0	
2. Do 30 Sec Skippable CPV - Youtube	14,207	2	0.01%	8,525	60.01%
<b>Grand total</b>	<b>31,625</b>	<b>7</b>	<b>0.02%</b>	<b>8,525</b>	<b>60.01%</b>

### Google Ads: Summary of Play Orlando North Youtube Campaigns


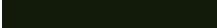


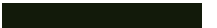























































Objective: Increase Impressions, Clicks and CTR.

Campaign	Impressions	Clicks	CTR	Video views	Video watch rate (%)
1. Play 15 Sec Non-Skippable CPM - Youtube	38,422	11	0.03%	0	
2. Play 30 Sec Skippable CPV - Youtube	23,216	5	0.02%	13,598	58.57%
<b>Grand total</b>	<b>61,638</b>	<b>16</b>	<b>0.03%</b>	<b>13,598</b>	<b>58.57%</b>



## Google AdWords: Summary of Search Keyword Performance

Objective: Summarize Impressions, Clicks and CTR by Keyword

	Campaign name	Ad group name	Keyword text	Clicks ▾	Impressions	CTR
1.	Do Orlando - Leisure	FOOD	orlando restaurants	1,528 	16,447 	9.29% 
2.	Do Orlando - Leisure	Parks	parks in Orlando	1,367 	15,125 	9.04% 
3.	Do Orlando - Leisure	Parks	Orlando hiking trails	580 	3,070 	18.89% 
4.	Do Orlando - Leisure	Nature Trails	orlando hiking trails	339 	1,037 	32.69% 
5.	Play Orlando - Sports	Sports	Sports Event	302 	1,983 	15.23% 
6.	Do Orlando - Leisure	FOOD	best food in Orlando	252 	1,707 	14.76% 
7.	Play Orlando - Sports	Soccer	Soccer Tournament	239 	1,987 	12.03% 
8.	Do Orlando - Leisure	Nature Trails	florida hiking trails	225 	1,363 	16.51% 
9.	Play Orlando - Sports	Soccer	Soccer Event	199 	1,442 	13.8% 
10.	Play Orlando - Sports	Football	Football Event	176 	1,679 	10.48% 
11.	Play Orlando - Sports	Sports	Sports Tournament	139 	1,333 	10.43% 
12.	Play Orlando - Sports	Sports	Sports Arena	126 	869 	14.5% 
13.	Do Orlando - Leisure	Parks	Orlando natural springs	125 	954 	13.1% 
14.	Play Orlando - Sports	Baseball	Baseball Tournament	122 	1,319 	9.25% 
15.	Play Orlando - Sports	Baseball	Baseball Event	116 	969 	11.97% 
16.	Do Orlando - Leisure	Parks	parks in central Florida	102 	1,272 	8.02% 
17.	Do Orlando - Leisure	Parks	nature parks in Orlando	100 	589 	16.98% 
18.	Play Orlando - Sports	Football	Football Tournament	89 	1,102 	8.08% 
19.	Play Orlando - Sports	Sports	Sports Complex	71 	715 	9.93% 
20.	Do Orlando - Leisure	Family	orlando family fun	66 	923 	7.15% 

### Paid Media: Summary of Campaigns


Objective: Summarize Impressions, Clicks and CTR by Keyword


Campaign Name ▾	Media Type	Ad Type	Impressions	Clicks	CTR
No data					
<b>Grand total</b>			<b>0</b>	<b>0</b>	<b>0</b>


### Digital Banner Ads: YTD

Objective: Increase Impressions, Clicks and CTR.

No (non-Google) paid media ran in August.


Impressions  
2,529,018


Clicks  
2,845


CTR  
0.11%

**Traffic Metrics**

Sessions  
**2,473**

New Sessions  
**2,250**

% New Sessions  
**90.98%**

Pageviews  
**2,737**

**Engagement Metrics**

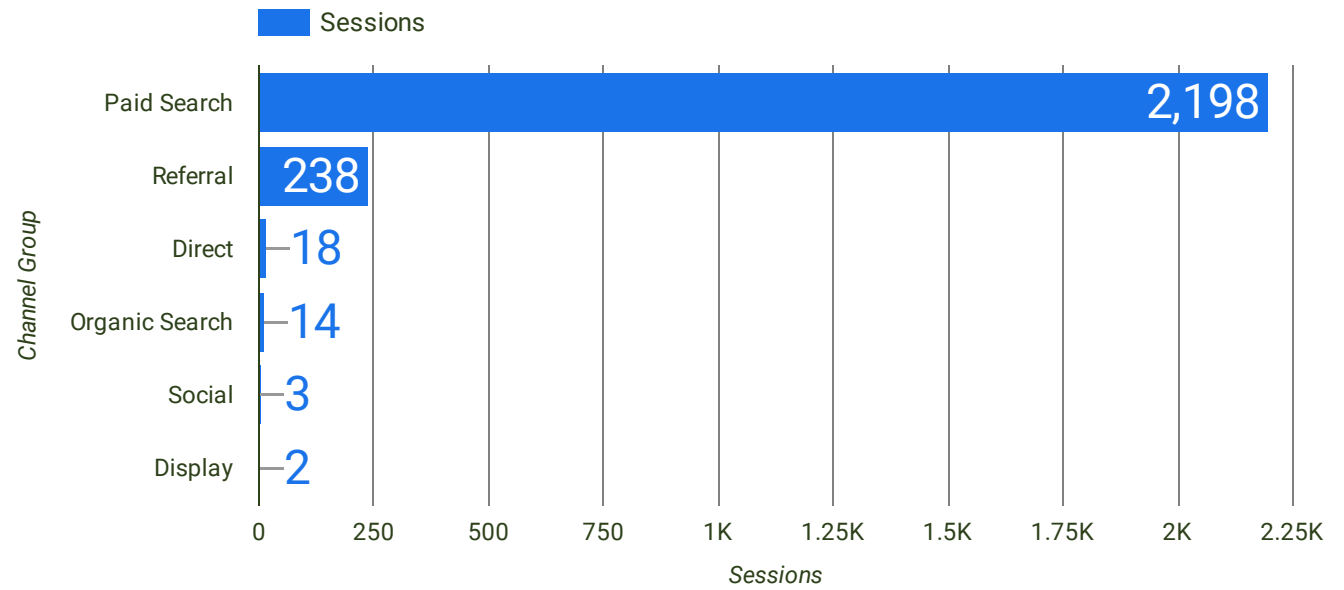
Pages / Session  
**1.11**

Bounce Rate  
**93.97%**

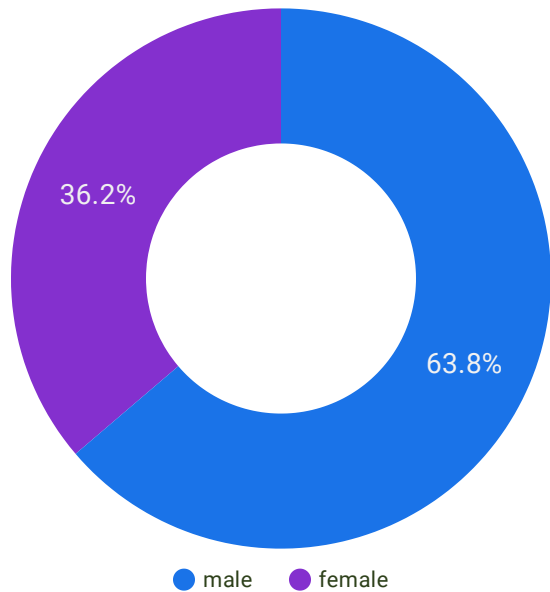
Avg. Session Duration  
**00:00:07**

Avg. Sessions per User  
**1.06**

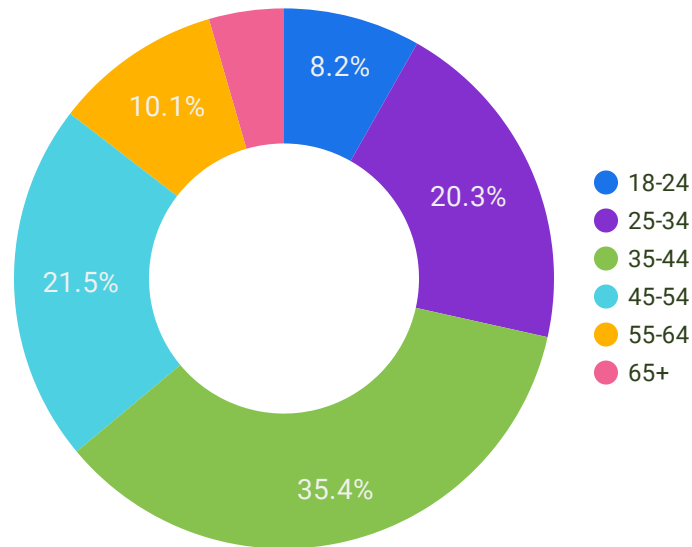
**Traffic Source Visualization**



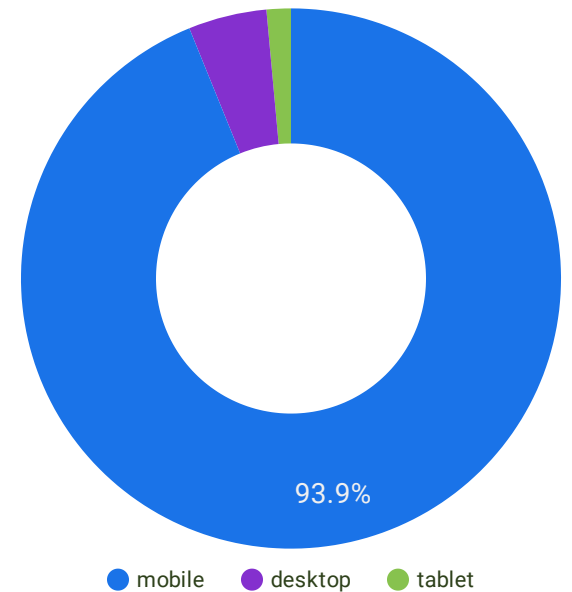
**Gender Demographics**




**Age Demographics**



**Device Demographics**







# DESTINATION MARKETING ACCREDITATION PROGRAM (DMAP)

**The globally recognized Destination Marketing Accreditation Program (DMAP) serves as a visible industry distinction that defines quality and performance standards in destination marketing and management.**

Achieving DMAP accreditation positions a destination organization or CVB as a valued and respected organization in your community and increases your credibility among stakeholders.

[\*\*PLATFORM LOGIN\*\*](#)

## *Eligibility*

- Destination organization or CVB is a legal organization or entity
- Destination marketing and management is the primary function of the organization
- The organization has two or more years of destination marketing and management expertise
- The organization is the official governing entity authorized to provide destination marketing and management services for the jurisdiction
- The organization agrees to abide by the **DMAP Code of Conduct**

## *Accreditation Standards*

To become accredited, a destination organization must demonstrate compliance with more than 100 performance standards. Accreditation standards are set by an independent panel of industry veterans representing a diverse selection of destination organizations. Standards are regularly revisited and revised to reflect the evolution of best practices in our industry. The accreditation standards include 20 optional Aspirational Standards. These are standards which are not necessarily established as best practices in the industry, but which are quickly becoming the norm. It is the expectation that Aspirational Standards will become required standards at some point in the future. The applicant does not need to meet these standards to become accredited.

## ACCREDITATION STANDARDS

## 4-YEAR RENEWAL STANDARDS

# ACCREDITED ORGANIZATIONS

With nearly 200 accredited organizations worldwide, DMAP is an internationally-recognized program that is essential to the success of destinations. See the full list of accredited organizations.

[Learn More](#)

## *Accreditation With Distinction*

Beginning in 2020, Destinations International began recognizing select outstanding destination organizations with a new tier of accreditation, Accreditation with Distinction. This is intended to recognize destination organizations that set the bar of excellence for our industry. To become Accredited with Distinction, an organization must meet three criteria:

1. Meet all 100+ accreditation standards with no standards marked “Compliant with Opportunity for Improvement”

2. Have at least one standard where the applicant is marked “Compliant Exemplary”, meaning the documentation submitted is truly outstanding and could be used to set the bar for the industry at large
3. Meet at least 10 of the 20 Aspirational Standards.

## *Application Timeline*

Organizations may begin working on their accreditation application and may submit their applications at any time throughout the year, however applications are only reviewed and approved twice per year. This is change from the past when applications were reviewed on a rolling basis. The accreditation review windows are intended to give clear timelines for organizations whose goal is to become accredited prior to Annual Convention or to become accredited during this calendar year.

## **Spring/Summer Review Cycle:**

Organizations that wish to complete their accreditation prior to Destination International’s Annual Convention must submit their completed applications by April 16th. Applicants will receive feedback on their initial applications and will be given an opportunity to revise their application if necessary. Organizations that are approved for accreditation during the spring/summer review cycle will be recognized at Annual Convention in July. Applications that are not approved for accreditation may be revised and re-submitted for review during the fall/winter review cycle. Applicants are not penalized for revising and re-submitting their applications.

- *Initial Application Deadline: April 16*
- *Notification of Decision: June 15*

## **Fall/Winter Review Cycle**

Organizations that wish to complete their accreditation by the end of the calendar year must submit their completed applications by October 1st. Applicants will receive feedback on their initial applications and will be given an opportunity to review their application if necessary. Organizations that are approved for accreditation during the fall/winter review cycle will be recognized at the following Annual Convention in July. Applications that are not approved for accreditation may be revised and re-submitted for review during the spring/summer review



cycle. Applicants are not penalized for revising and re-submitting their applications. Applicants whose accreditation is approved will be notified of the decision by email on or before December 15.

- *Application Deadline: October 1*
- *Notification of Decision: December 15*