



MARKET DEMAND STUDY & SITE OPTIONS ANALYSIS  
FOR A NEW MULTI-PURPOSE EVENT CENTER IN  
ALACHUA COUNTY, FLORIDA

January 14, 2019





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## EXECUTIVE SUMMARY



# INTRODUCTION & MARKET ANALYSIS



**Project Background** - Victus Advisors was engaged by Alachua County (the “County”) in August 2018 to provide the County with a market demand study and site options analysis for a new multi-purpose event center. The County envisions that this event center will be an approximately 92,000 square foot multi-purpose, flexible, and functional space that will accommodate athletic events, banquets, graduations, motor vehicle shows, and various consumer shows, performances, and meetings. The recent renovations to the University of Florida’s O’Connell Center saw the loss of the region’s only indoor track and the loss of related events. The event center will include an indoor track that will draw events and visitors from throughout the southeastern United States and beyond.

**Project Goals** - Our primary project goals for this study include:

- Estimate market demand for a new multi-purpose event center.
- Based on demand, determine what programs, features, and amenities could be supported by the market.
- Determine if the potential success of the facility is dependent on the facility’s location within the County.

**Demographic & Socioeconomic Analysis** - Alachua County is part of the Gainesville, FL Metropolitan Statistical Area (MSA), as designated by the U.S. Office of Management & Budget. The MSA is comprised of Alachua and Gilchrist Counties, and it has an estimated population of 283,059, with 265,286 coming from Alachua County.

Alachua County’s population is projected to grow at a slightly higher rate than the U.S. as a whole. In terms of median age, Alachua County has a lower median age than the U.S. average. A lower median age tends to represent a larger presence of working-age populations and young families. Furthermore a lower median age indicates positive potential for sports and event activity.

When adjusted for cost of living, the median household income in Alachua County is below the U.S. average. Higher household income levels can often indicate an ability for a household to spend disposable income on sports and other entertainment events.

There are five large markets (with a population of more than 500,000 people each) within a 2.5-hour drive of Alachua County. An additional six large markets are within a 5-hour drive (overnight trip), with a total population within a 5-hour drive of Gainesville of nearly 15 million people. It is noted that other small cities (such as Tallahassee) are also located within these drive-time windows.



# COMPETITIVE & COMPARATIVE MARKET & FACILITY ANALYSIS



**Overview** - Based upon our community feedback process, which is described in detail later in this report, the Alachua County community identified sports, meeting, and event facilities in the following markets as potentially competitive or comparative with a new multi-use event center in Gainesville. Victus Advisors compared the Gainesville Metropolitan Statistical Area's demographic and socioeconomic characteristics to the competitive set of MSAs in Florida and the southeast (listed in alphabetical order below):

- Birmingham, Alabama
- Daytona Beach, FL
- Jacksonville, FL
- Lakeland, FL
- Myrtle Beach, SC
- Orlando, FL
- Tallahassee, FL
- Tampa, FL
- Virginia Beach, VA

**Population** - The Gainesville MSA's population of 283,059 represents the least populated out of the 10 markets selected for comparative analysis. Given the smaller market size, it is important that seating/attendance capacities in a new event center be appropriately sized for the population base.

**Population Growth** - The projected population growth rate of the Gainesville MSA ranks seventh among the 10 comparative markets.

**Median Age** - The Gainesville MSA's median age of 32.3 is lowest among comparative markets. This may be due to the student base at the University of Florida.

**Youth** - Nearly 54% of households in the Gainesville market have children, which ranks last amongst comparative markets. Again this may be due in part to the large student population at the University of Florida.

**Household Income** - The Gainesville market ranks last among comparative markets in terms of cost-of-living-adjusted median household income, which can be a potential indicator of household budgets available for spending on sports, entertainment, recreation, and leisure. Therefore, it is important that a new event center be developed with a flexible layout and multiple uses, so as to tap into a wider variety of event demand, users, and attendees.

**Corporate Base** - Among comparative markets, Gainesville ranks last in terms of business inventory, which can be an indicator for potential corporate sponsorship and naming rights support for new event facilities.



# COMPETITIVE & COMPARATIVE MARKET & FACILITY ANALYSIS (CONT.)



**Comparative Facilities** - Within each comparable market, Victus analyzed facilities that could potentially be comparable or competitive to a new event center in Alachua County. We've classified them as Sports Facilities, Conference & Meeting Facilities, and Event Centers:

## Sports Facilities

- The Big House - Tavares, FL
- Birmingham Crossplex - Birmingham, AL
- Boo Williams Sportsplex - Hampton, VA
- Legacy Park Multipurpose Center - Alachua, FL
- Myrtle Beach Sports Center - Myrtle Beach, SC
- Pasco Sports Complex - Pasco County, FL
- Virginia Beach Sports Center - Virginia Beach, VA

## Conference & Meeting Facilities

- Best Western Grand Gateway - Gainesville, FL
- Hilton University of Florida - Gainesville, FL
- Ocean Center - Daytona Beach, FL
- Turnbull Florida State Conference Center - Tallahassee, FL

## Event Centers

- Veterans Memorial Arena - Jacksonville, FL
- O'Connell Center - Gainesville, FL
- RP Funding Center - Lakeland, FL
- Tucker Civic Center - Tallahassee, FL

## **Key Takeaways -**

- The Sports Tourism industry is large and growing, and a tournament-caliber sports facility could have a significant impact on Alachua County if a venue is large enough (ideally with at least 8 indoor basketball/volleyball courts and indoor track capabilities) and located within close proximity of highways, hotels, and other hospitality amenities.
- Expos and Trade Shows are typically conducted in column-free, concrete floor space, such as a convention hall or arena/event center with retractable seating. Victus Advisors believes that a multi-purpose event center in Alachua County could utilize retractable seating to create a larger, concrete flat-floor space than currently exists in the County to appeal to small/medium-sized conferences, trade shows, and expos.
- Due to the size of the Alachua County market and the nature of the concert/entertainment event industry, it is expected that a new multi-purpose event center in Alachua County would not consistently attract touring Concert and Family Show activity. Any concert activity held in the facility is likely to be smaller, local concert activity.
- In order to accommodate indoor sports courts, trade shows/expos, and indoor track with spectator seating for regional meets, it is likely that a new multi-use event center in Alachua County would require a larger Square Footage than the County's preliminary facility concepts (of approximately 92,000 sq. ft.).





# INTERVIEW SUMMARIES

**Overview** - In September 2018, Alachua County identified participants and scheduled a series of one-on-one interviews for Victus Advisors. The goals of these interviews were to gather feedback from key stakeholders and community leaders regarding the market potential for a new event center in Gainesville. Also in October 2018, Victus Advisors held telephone interviews with operators, promoters and influencers of sports, entertainment, and trade show/conference events both regionally and nationwide.

**Interview Topics** - One-on-one and phone interview topics included:

- Perceptions of Alachua County
- Alachua County's current event venue offerings
- Possible comparable and competitive venues and markets
- Ideal amenities and potential events that could be held at the new event center

## **Interview Key Takeaways -**

- Almost every interviewee mentioned the O'Connell Center as the primary event venue in Alachua County. Since the renovation of the O'Connell Center, several events have been displaced from the venue including indoor track and field events, Cirque du Soleil, and some exhibition shows.
- Almost all interviewees were in favor of a new event center of some kind in the County. Many of those interviewed said that there is not much opposition to its development.

- Many expressed that Gainesville lacks a space for local meetings, conventions, and conferences. One interviewee mentioned that some companies must go to other markets (Orlando and Jacksonville) for employee events and conferences.
- Some people interviewed said that a concert venue is needed in the County and that they support a facility that can host concerts. Whereas others indicated that Gainesville is a weak concert market and do not see a new facility drawing concerts.
- Many people interviewed think that the new event center should be in a location with easy access to hotels, retail, and dining options. Several interviewees indicated that anywhere along the highly-trafficked I-75 corridor would be great due to ease of access to these same amenities.
- A shared sentiment among many people interviewed is that there is demand to build a new event center on the west side of the County due to existing economic development there, and that the east side of the County does not offer as many amenities and infrastructure support for such a facility. A few interviewees specifically suggested Celebration Pointe as a good location for the potential facility, due to its proximity to hotel, retail, and dining, as well as I-75 access.



# SITE OPTIONS ANALYSIS

**Overview** - Victus Advisors was tasked with analyzing the market viability of three (3) potential locations for the event center, as defined by the County. Victus Advisors toured the potential sites, researched the ownership and other such factors for each site, and met with County and City of Gainesville staff, local developers, and other potential project stakeholders, which includes the following sites:

- A. Koppers Site
- B. MLK Site
- C. North Waldo Road Sites

**Site Scoring Criteria** - Each potential site in Alachua County was assessed and scored by Victus Advisors based upon the following general categories:

- 1. Site Factors
- 2. Economic & Hospitality Factors

## Site Scoring Matrix -

- Victus Advisors assigns a score of Above Average (3), Satisfactory (2), Below Average (1) for each criteria. High scores are assigned to the most suitable site and low scores assigned to the least suitable, based on each factor.
- A percentage score is calculated for each site, based upon total score awarded and total points available. Generally speaking, a percentage score of 50% or less represents a site that would not be recommended, 50-75% represent a potentially suitable site, and over 75% represent a highly recommended site.

	Site A 200 NW 23rd Ave (Koppers Site)	Site B 1400 NE 8th Ave (MLK Site)	Site C 3100 NE 39th Ave & 1621 NE Waldo Rd (North Waldo Road Sites)
<b>Site Specifics</b>			
Site size and configuration/ability to accommodate building program	3	1	2
Ability to accommodate additional commercial development on-site	3	1	2
On-site parking opportunities	3	1	2
Environmental considerations, demolition/relocation, and other costs	1	2	2
<b>Economic &amp; Hospitality Factors</b>			
Presence of on-site/adjacent commercial development (hotel, retail, restaurants, etc.)	1	1	1
Presence of commercial development within 5-minute drive	2	2	1
Compatibility of adjacent property uses	2	2	1
Convenient highway access	1	1	1
<b>TOTAL SCORE</b>	16	11	12
<b>TOTAL POINTS AVAILABLE</b>	24	24	24
<b>PERCENTAGE SCORE</b>	67%	46%	50%

## Site Conclusions-

- Koppers Site is the only one of the three analyzed that Victus Advisors scored as “potentially suitable”. Key positive aspects of the site include revitalization potential via connectivity between existing urban development projects, and the large size of the site, which can potentially accommodate the event center, parking, other on-site development, and open space.
- Victus was only tasked with analyzing three sites/areas, however many community stakeholders felt a new event center should be located with easy access to hotels, retail, dining, and the high-traffic I-75 corridor. Several suggested Celebration Pointe as the ideal event center location for maximizing tourism.
- The long-term sustainability and repeat visitor impacts of a new event center are highly dependent on the proximity and ease of access to desirable tourist hospitality amenities such as hotels, restaurants, retail, etc. A new event center in an area with limited hospitality infrastructure is likely to struggle in terms of long-term sustainability, unless new hospitality is built adjacent to the event center as part of the initial development project.





# PROGRAM DEMAND ANALYSIS & FACILITY RECOMMENDATIONS



**Overview** - Our program demand analysis and facility recommendations are based primarily upon the following primary and secondary research conducted by Victus Advisors over the course of this study:

- Analysis of Alachua County's unique market characteristics.
- Review of comparative markets.
- Community feedback via interviews.
- Interviews conducted with event organizers and operators.

The primary goals of our study have been to estimate market demand for a new multi-purpose event center and determine if the potential success of the facility is dependent on the facility's location within the County.

## Building Program Recommendations -

- **Size of Facility:** Victus Advisors reviewed Alachua County's preliminary facility concepts for an approximately 92,000 square foot multi-purpose event center. Based upon Victus Advisors' research, and our team's industry experience with similar facilities, it is likely that the proposed facility would have to be somewhat larger in order to accommodate the types of programming Alachua County would like to attract.
- **Venue Programming:** The venue should be multi-purpose and maximize daily use. The recommended programming should include: indoor track and field; high school and youth/amateur basketball, volleyball, gymnastics, cheer, and wrestling; flat floor and consumer shows.

- **Flat Floor Space:** A typical event center floor (without retractable seating) has approximately 17,000 sq. ft. of concrete floor space, however the use of retractable seating systems could expand the available floor space to 30,000 sq. ft. or more. It is estimated that 30,000 sq. ft. of event floor space could accommodate as many as 150 ten-by-ten foot booths for trade show-type events.

Based upon the results of our market and facility analysis, Victus Advisors recommends that a new multi-purpose event center in Alachua County should have:

- A minimum of eight (8) basketball courts, which should be convertible to eight (8) or more volleyball courts to be able to attract regional and major tournaments.
- The same flat floor space used by basketball, volleyball, and other sports (with portable sports flooring) should be adaptable for conference, expos, and meetings (on concrete floors).
- A removal banked track that could accommodate competitive indoor track events at the youth and collegiate level.
- Support areas and amenities, including lobby, concessions, team rooms, offices, mechanical/electrical rooms, storage, circulation, etc.
- Retractable seating capacity for at least 3,000 people to fulfill minimum NCAA/NAIA requirement.
- Modern amenities such as wireless internet capabilities and flexible space configurations.
- At least one available parking spot within walking distance for every three attendees.



## 1. INTRODUCTION



# PROJECT BACKGROUND



**Victus Advisors** was engaged by **Alachua County** (the “County”) in August 2018 to provide the County with a market demand study and site options analysis for a new multi-purpose event center. The County envisions that this event center will be an approximately 92,000 square foot multi-purpose, flexible, and functional space that will accommodate athletic events, banquets, graduations, motor vehicle shows, and various consumer shows, performances, and meetings. The recent renovations to the University of Florida’s O’Connell Center saw the loss of the region’s only indoor track and the loss of related events. The event center will include an indoor track that will draw events and visitors from throughout the southeastern United States and beyond.

Victus Advisors’ primary project goals for this study include:

- Estimate market demand for a new multi-purpose event center.
- Based on demand, determine what programs, features, and amenities could be supported by the market.
- Determine if the potential success of the facility is dependent on the facility’s location within the County.

## PHASES:

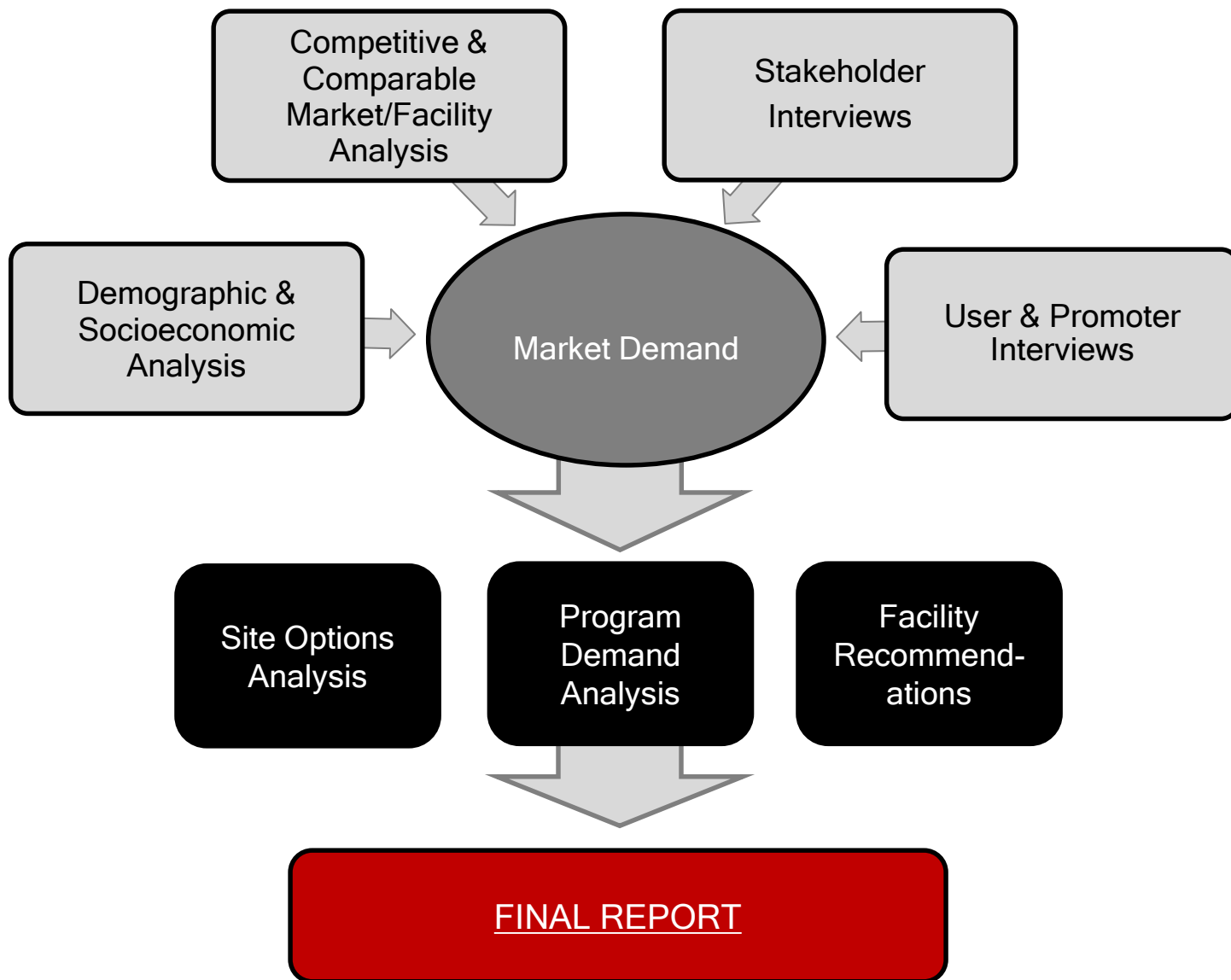
### 1. MARKET DEMAND ANALYSIS



### 2. SITE OPTIONS & PROGRAM DEMAND FOR A PROPOSED VENUE

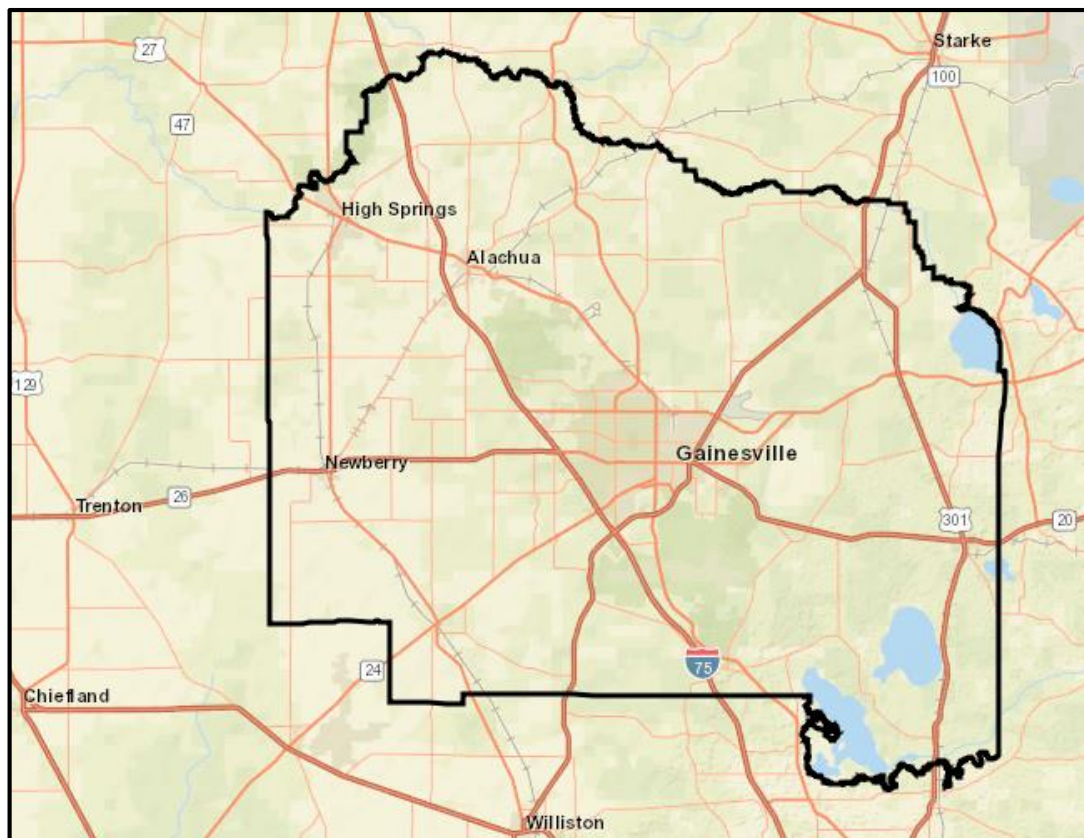


### 3. FINAL DELIVERABLES





## 2. DEMOGRAPHIC & SOCIOECONOMIC ANALYSIS



Source: Esri

Alachua County is part of the Gainesville, FL Metropolitan Statistical Area (MSA), as designated by the U.S. Office of Management & Budget. The MSA is comprised of Alachua and Gilchrist Counties, and it has an estimated population of 283,059, with 265,286 coming from Alachua County. Alachua County is shown in the map on the left.





# POPULATION DATA

	Alachua County	United States
Population	265,286	330,088,686
Population Under 18	44,026	73,315,750
Percentage of Population Under 18	16.6%	22.2%
Population Growth:		
Annual Pop. Growth (2000 to 2018)	1.1%	0.9%
Annual Pop. Growth (5-year Projection)	1.1%	0.8%
Projected Population (2023)	279,563	343,954,683
Median Age	31.8	38.3

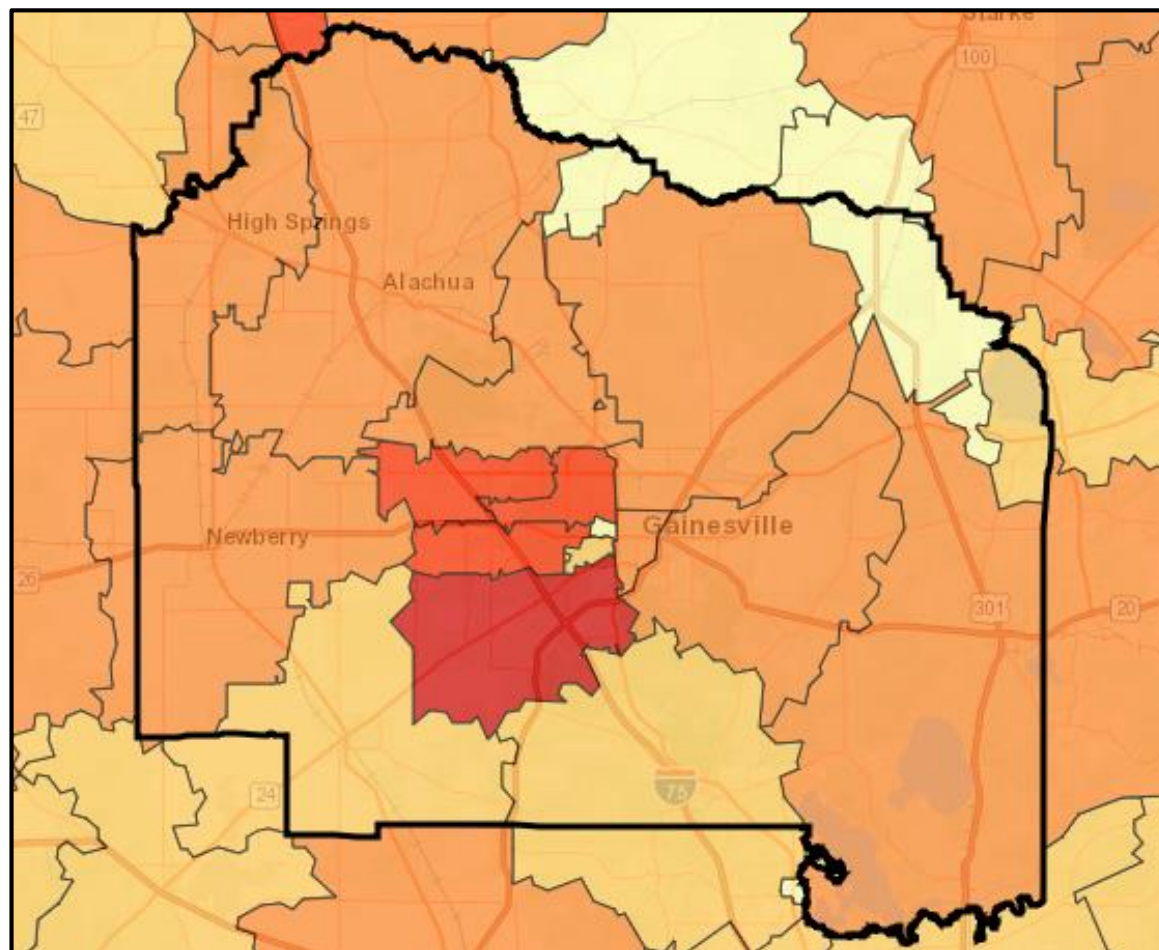
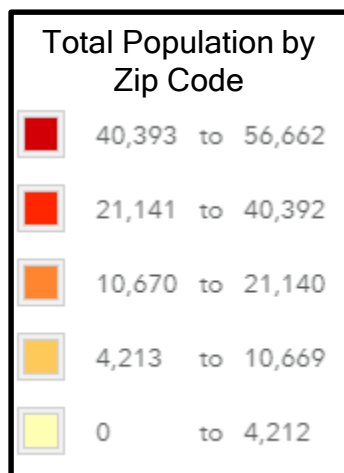
Source: Esri

Alachua County's population is projected to grow at a slightly higher rate than the U.S. as a whole.

In terms of median age, Alachua County has a lower median age than the U.S. average. A lower median age tends to represent a larger presence of working-age populations and young families.

Furthermore a lower median age indicates positive potential for sports and event activity.

# POPULATION DISTRIBUTION

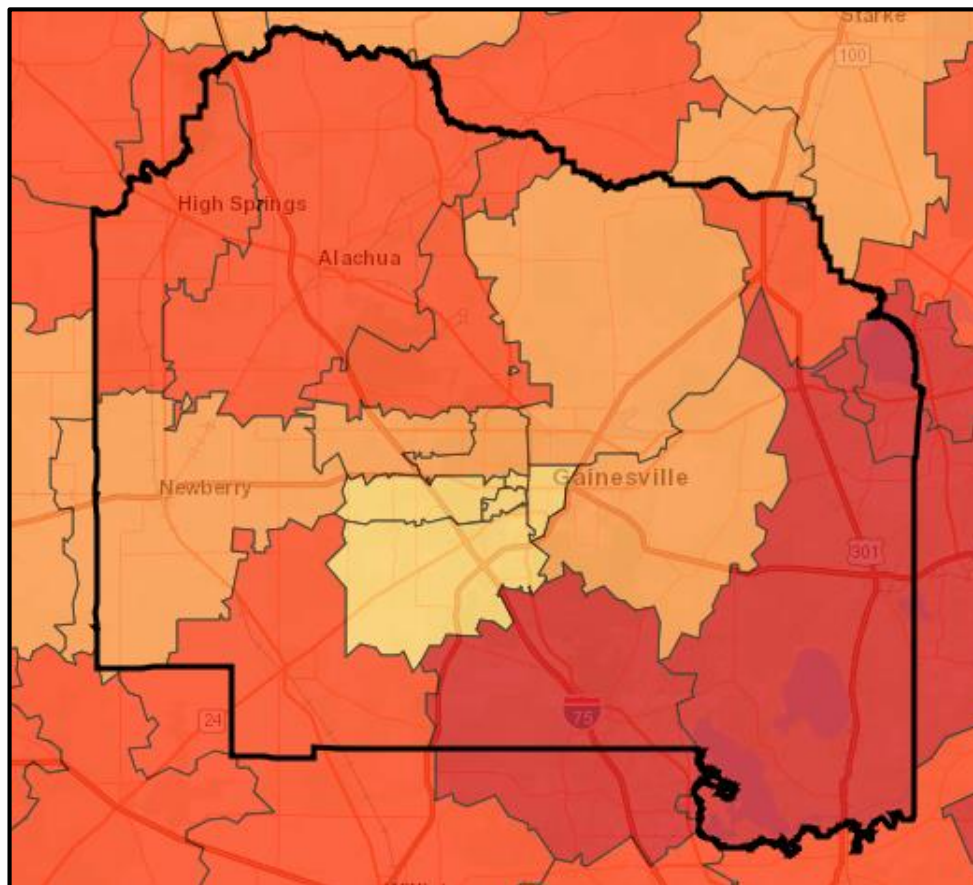


Source: Esri

Population density in Alachua County is highest to the West of the City of Gainesville.

# AGE DISTRIBUTION

## Median Age Distribution by Zip Code



Source: Esri

Younger age groups tend to be clustered around the University of Florida and southwest of Gainesville.



# HOUSEHOLD DATA

	Alachua County	United States
Total Households	251,386	124,110,001
Households With Children Under 18	164,551	81,631,156
Percentage of Households With Children	65.5%	65.8%

Source: Esri

	Alachua County	United States
Median Household Income	\$45,357	\$58,100
Adjusted Median Household Income (1)	\$50,906	\$58,100

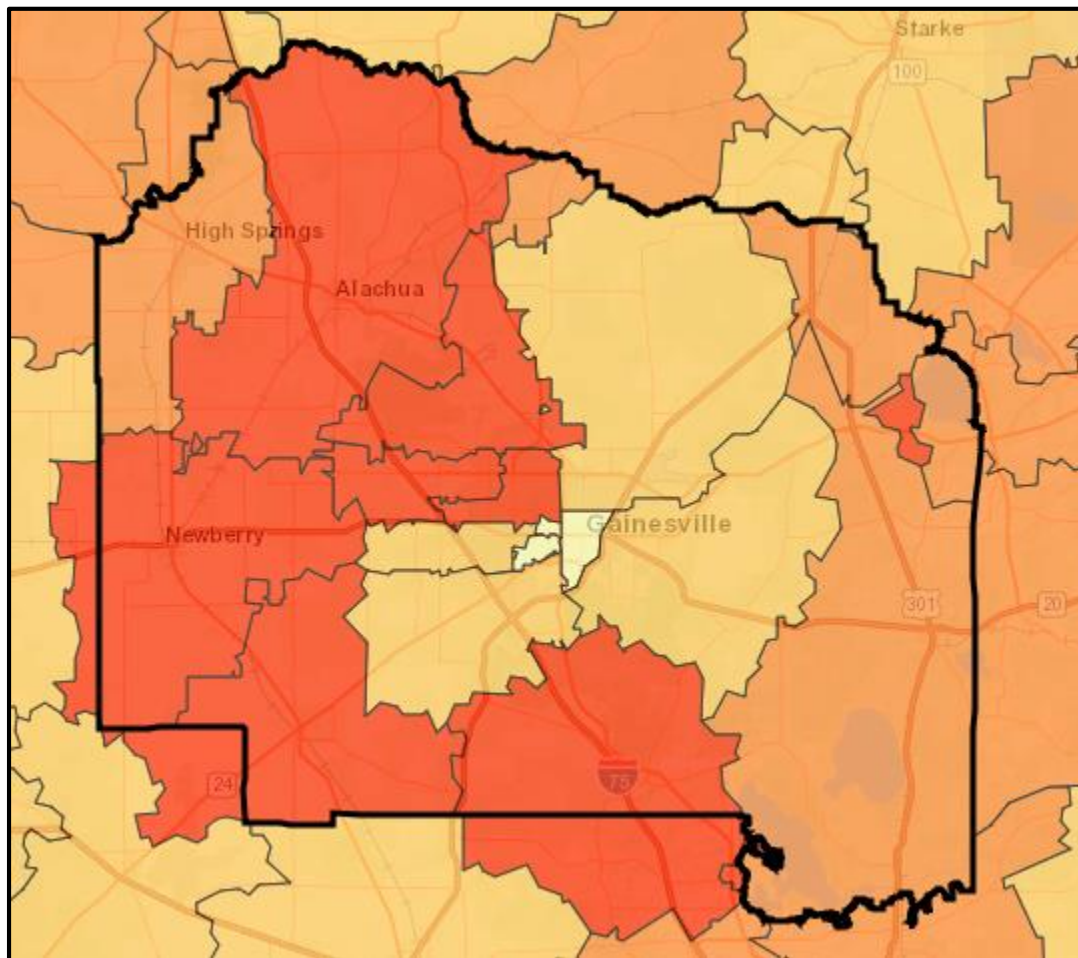
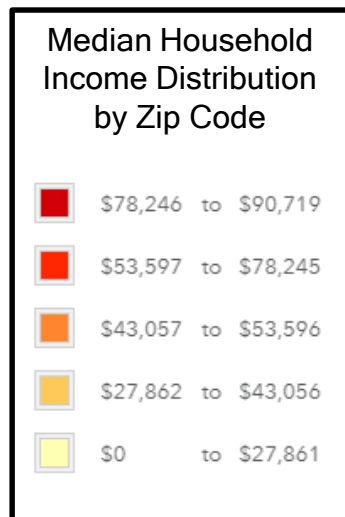
Sources: Esri, city-data.com

Note: (1) Adjusted for cost of living according to city-data.com

Alachua County has a similar percentage of households with children compared to the U.S. average. A high percentage of households with children is a positive indicator for youth sports and entertainment demand in the region.

When adjusted for cost of living, the median household income in Alachua County is below the U.S. average. Higher household income levels can often indicate an ability for a household to spend disposable income on sports and other entertainment events.

# INCOME DISTRIBUTION

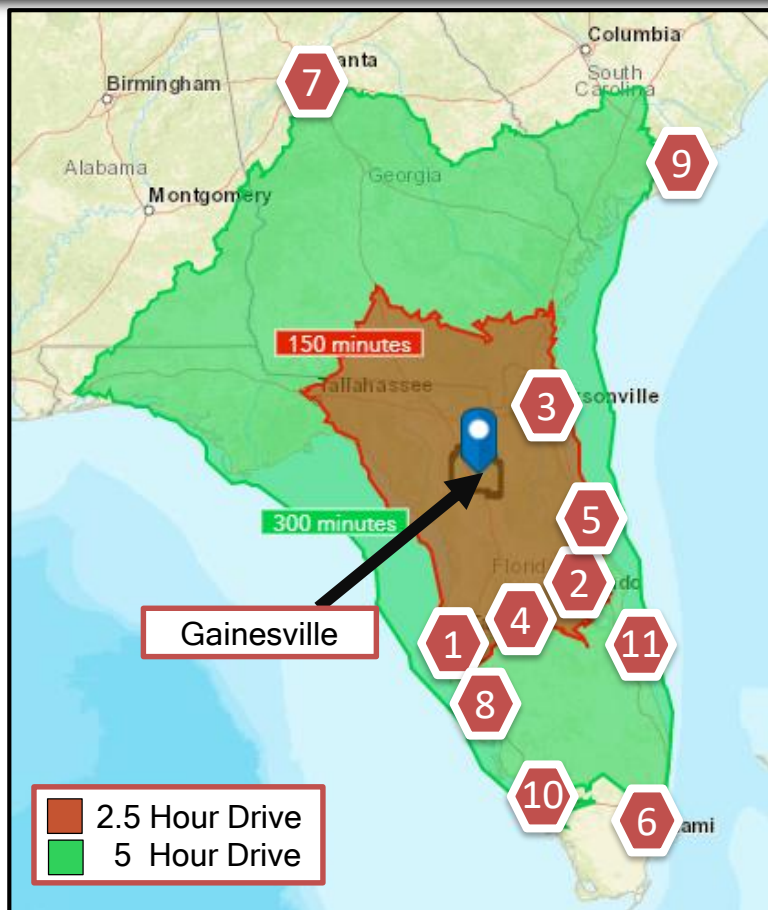


Source: Esri

Median Household Income levels tend to be highest in the western half of the County, with lower income levels near downtown Gainesville.



# TOURISM DRIVE TIME ZONES



Source: Esri

## \* METROPOLITAN STATISTICAL AREA (MSA)

MSA's are defined by U.S. Office of Management & Budget as adjacent counties with high degree of social/economic integration with urban core of 50,000 people or more.

There are five large markets (with a population of more than 500,000 people each) within a 2.5-hour drive of Alachua County. An additional six large markets are within a 5-hour drive (overnight trip), with a total population within a 5-hour drive of Gainesville of nearly 15 million people. It is noted that other small cities (such as Tallahassee) are also located within these drive-time windows.

### MSA's\* with 500,000+ Population Within a 2.5-hour Drive

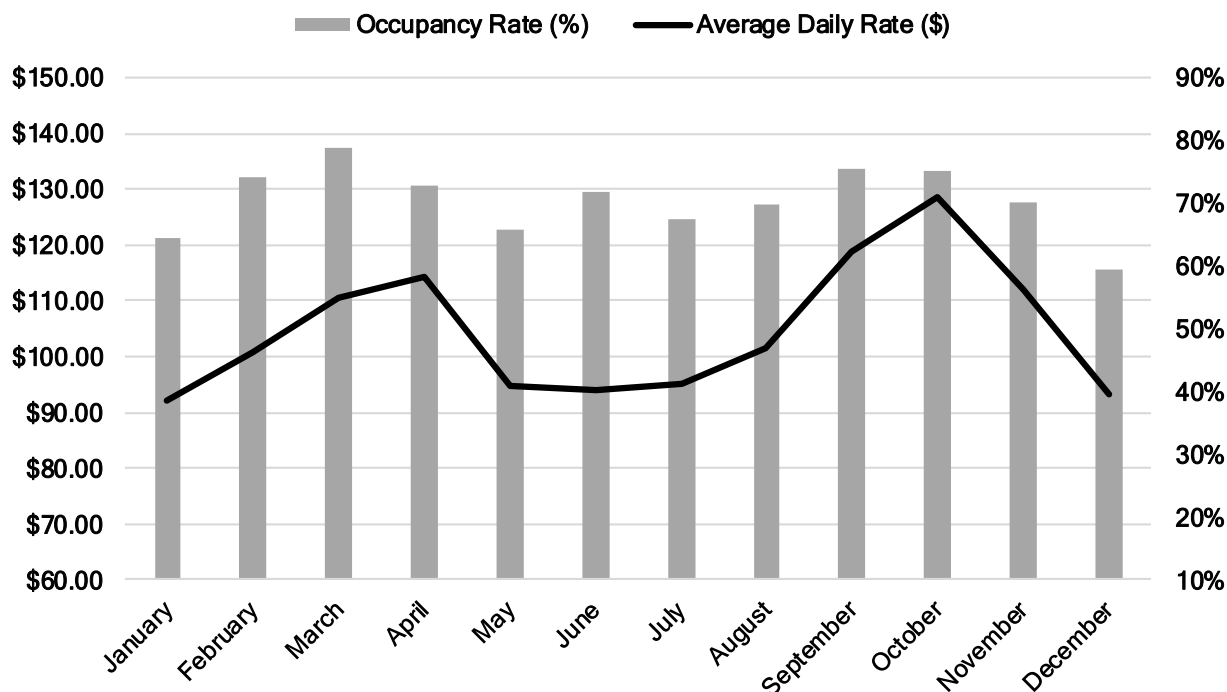
- 1 Tampa-St. Petersburg MSA  
3,098,274
- 2 Orlando-Kissimmee MSA  
2,500,950
- 3 Jacksonville MSA  
1,523,615
- 4 Lakeland MSA  
667,696
- 5 Daytona Beach MSA  
648,188

### MSA's\* with 500,000+ Population Within a 5-hour Drive

- 6 Miami-Ft. Lauderdale MSA  
6,076,113
- 7 Atlanta MSA  
5,891,925
- 8 Sarasota-Bradenton MSA  
800,171
- 9 Charleston MSA  
783,132
- 10 Cape Coral-Ft. Myers MSA  
719,287
- 11 Palm Bay MSA  
586,206



# 2017 HOTEL DATA



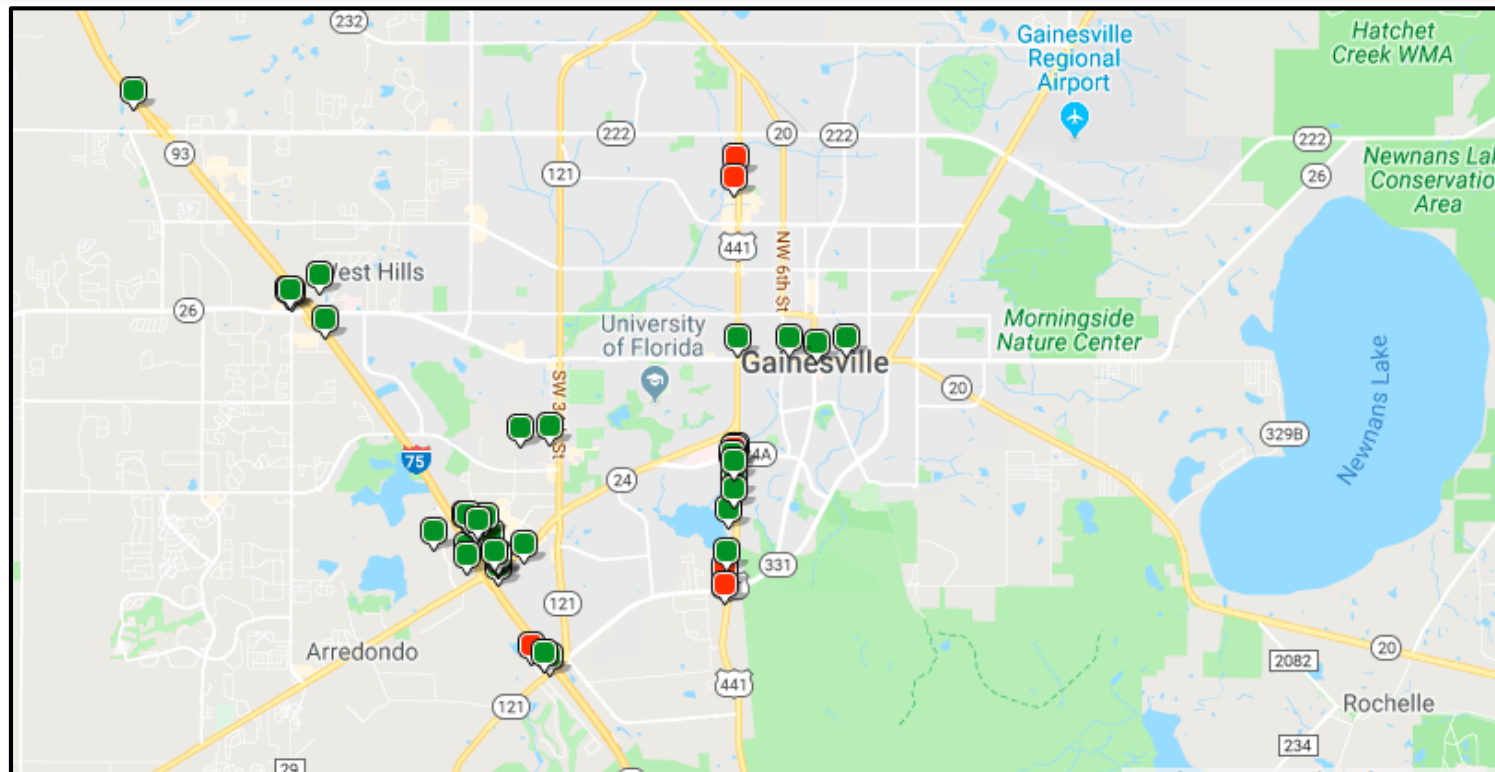
Source: Alachua County CVB

Nationwide, the Average Daily Rate (ADR) of hotels in 2017 was more than \$126 per night with 66% overall annual occupancy, whereas Alachua County hotel ADRs ranged from \$105 to \$145 per night throughout the calendar year, with occupancy rates ranging from approximately 59% to 79%.

Occupancy peaks in March and October. ADR peaks during October with lower visitation rates occurring in the summer and winter months. This apparent seasonality in visitation to Alachua County could pose a potential opportunity for new indoor venues in the summer and winter to fill underutilized hotel rooms at family-friendly rates.



# HOTEL INVENTORY



Source: Hotels.com, Google Maps

Note: Minimum 2-star hotel class

Convenient, affordable, family-friendly lodging (preferably within a 5 to 10 minute drive from an event venue, if not located on-site) is an important component of attracting and hosting multi-day tournament, tourism and event activity.

Victus found that lodging (minimum 2-star hotel class) near Gainesville is primarily concentrated in two locations: 1) south of Gainesville along U.S. Route 441, and 2) west of Gainesville near the intersection of I-75 and State Road 24. An additional small inventory of hotels can be found downtown.



### 3. COMPETITIVE & COMPARABLE MARKET & FACILITY ANALYSIS



# COMPARATIVE MARKETS



Based upon our community feedback process, which is described in detail later in this report, the Alachua County community identified sports, meeting, and event facilities in the following markets as potentially competitive or comparative with a new multi-use event center in Gainesville. Victus Advisors compared the Gainesville Metropolitan Statistical Area's demographic and socioeconomic characteristics to the competitive set of MSAs in Florida and the southeast (listed in alphabetical order below):

- Birmingham, Alabama
- Daytona Beach, FL
- Jacksonville, FL
- Lakeland, FL
- Myrtle Beach, SC
- Orlando, FL
- Tallahassee, FL
- Tampa, FL
- Virginia Beach, VA



# COMPARATIVE MARKETS - POPULATION

MSA	MSA Population
Tampa, FL	3,098,274
Orlando, FL	2,500,950
Virginia Beach, VA	1,772,840
Jacksonville, FL	1,523,615
Birmingham, AL	1,173,590
Lakeland, FL	667,696
Daytona Beach, FL	648,188
Myrtle Beach, SC	467,292
Tallahassee, FL	385,855
Gainesville, FL	283,059
<b>Average</b>	<b>1,252,136</b>
<b>Median</b>	<b>920,643</b>

*Source: Esri*

*Note: Sorted by Total Population in descending order*

The Gainesville MSA's population of 283,059 represents the least populated out of the 10 markets selected for comparative analysis. Given the smaller market size, it is important that seating/attendance capacities in a new event center be appropriately sized for the population base.



# COMPARATIVE MARKETS - POP. GROWTH

MSA	Annualized Pop. Growth (2000-2018)	Proj. Annual Pop. Growth (2018-2023)
Myrtle Beach, SC	3.1%	2.7%
Orlando, FL	2.4%	2.0%
Jacksonville, FL	1.7%	1.7%
Lakeland, FL	1.8%	1.6%
Daytona Beach, FL	1.5%	1.4%
Tampa, FL	1.4%	1.4%
Gainesville, FL	1.1%	1.1%
Virginia Beach, VA	0.6%	0.6%
Tallahassee, FL	1.0%	0.6%
Birmingham, AL	0.6%	0.5%
<b>Average</b>		<b>1.4%</b>
<b>Median</b>		<b>1.4%</b>

Source: Esri

Note: Sorted by Proj. Annual Pop. Growth in descending order

The projected population growth rate of the Gainesville MSA ranks seventh among the 10 comparative markets.





# COMPARATIVE MARKETS - MEDIAN AGE

MSA	Median Age
Gainesville, FL	32.3
Tallahassee, FL	33.7
Virginia Beach, VA	36.8
Orlando, FL	37.3
Jacksonville, FL	38.6
Birmingham, AL	39.0
Lakeland, FL	41.4
Tampa, FL	42.8
Myrtle Beach, SC	45.0
Daytona Beach, FL	47.8
<b>Average</b>	<b>39.5</b>
<b>Median</b>	<b>38.8</b>

*Source: Esri*

*Note: Sorted by Median Age in ascending order*

The Gainesville MSA's median age of 32.3 is lowest among comparative markets. This may be due to the student base at the University of Florida.



# COMPARATIVE MARKETS - YOUTH

MSA	Total Households	Households w/ Children Under 18	% of Households w/ Children
Lakeland, FL	249,123	173,193	69.5%
Virginia Beach, VA	664,644	448,358	67.5%
Birmingham, AL	459,752	306,666	66.7%
Orlando, FL	925,068	616,987	66.7%
Jacksonville, FL	588,042	390,449	66.4%
Myrtle Beach, SC	196,299	127,314	64.9%
Daytona Beach, FL	267,716	169,954	63.5%
Tampa, FL	1,257,748	776,149	61.7%
Tallahassee, FL	149,144	86,209	57.8%
Gainesville, FL	114,124	61,245	53.7%
<b>Average</b>	<b>487,166</b>	<b>315,652</b>	<b>63.8%</b>
<b>Median</b>	<b>363,734</b>	<b>239,930</b>	<b>65.6%</b>

Source: Esri

Note: Sorted by % of Households w/ Children in descending order

Nearly 54% of households in the Gainesville market have children, which ranks last amongst comparative markets. Again this may be due in part to the large student population at the University of Florida.

A large population of households with children can be a positive indicator for youth/amateur sports participation. Given the small youth population in the Gainesville MSA, it is important that a new event center be developed with a flexible layout and multiple uses, so as to tap into a wider variety of event demand.



# COMPARATIVE MARKETS - HOUSEHOLD INC.



MSA	Median Household Income	Adj. Median Household Income
Jacksonville, FL	\$56,587	\$64,085
Virginia Beach, VA	\$61,617	\$62,939
Birmingham, AL	\$53,468	\$61,317
Orlando, FL	\$53,891	\$57,761
Myrtle Beach, SC	\$50,339	\$55,136
Tallahassee, FL	\$49,103	\$54,378
Lakeland, FL	\$47,429	\$54,329
Daytona Beach, FL	\$48,067	\$53,646
Tampa, FL	\$51,596	\$53,578
Gainesville, FL	\$45,316	\$50,689
<b>Average</b>		<b>\$56,786</b>
<b>Median</b>		<b>\$54,757</b>

*Sources: Esri, city-data.com*

*Note: Sorted by Adj. Median Household Income in descending order*

The Gainesville market ranks last among comparative markets in terms of cost-of-living-adjusted median household income, which can be a potential indicator of household budgets available for spending on sports, entertainment, recreation, and leisure. Therefore, it is important that a new event center be developed with a flexible layout and multiple uses, so as to tap into a wider variety of event demand, users, and attendees.



# COMPARATIVE MARKETS - CORPORATE BASE

MSA	Total Businesses
Tampa, FL	102,138
Orlando, FL	87,141
Jacksonville, FL	55,098
Virginia Beach, VA	54,563
Birmingham, AL	41,365
Daytona Beach, FL	22,160
Myrtle Beach, SC	18,658
Lakeland, FL	16,982
Tallahassee, FL	14,510
Gainesville, FL	10,011
<b>Average</b>	<b>42,263</b>
<b>Median</b>	<b>31,763</b>

*Source: Esri*

*Note: Sorted by Total Businesses in descending order; Defined as NAICS recognized businesses.*

Among comparative markets, Gainesville ranks last in terms of business inventory, which can be an indicator for potential corporate sponsorship and naming rights support for new event facilities.

Within each comparable market, Victus analyzed facilities that could potentially be comparable or competitive to a new event center in Alachua County. We've classified them as **Sports Facilities**, **Conference & Meeting Facilities**, and **Event Centers**, and profiled them in the rest of this section.

## Sports Facilities

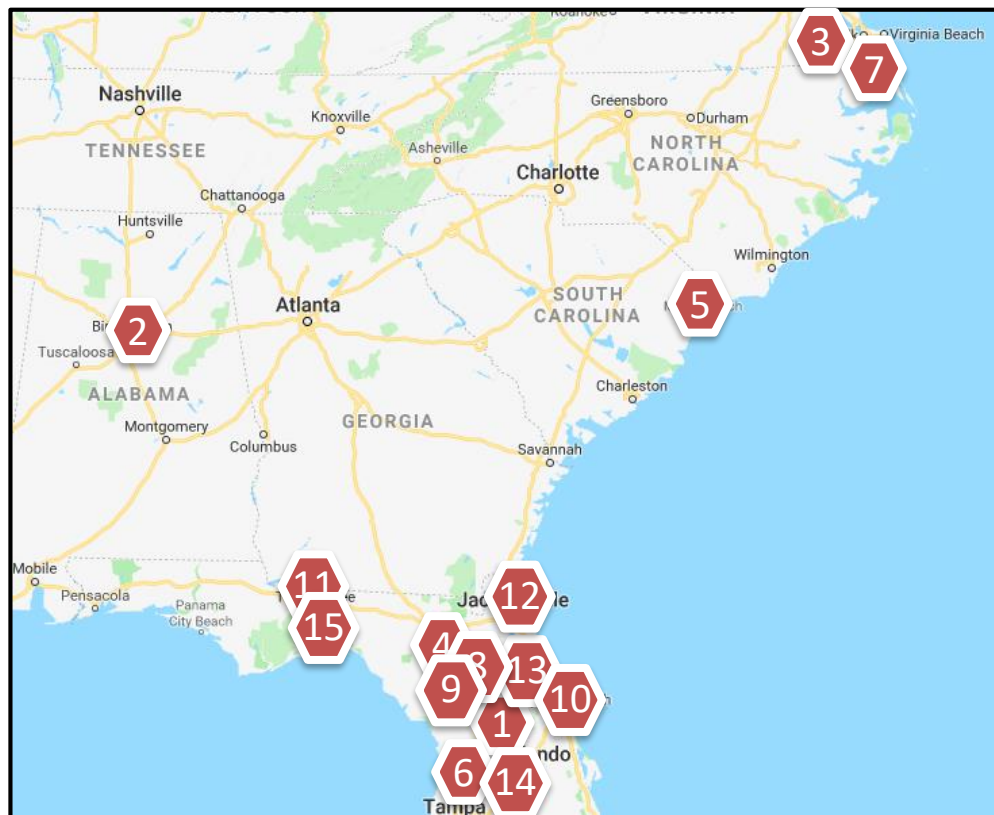
1. The Big House - Tavares, FL
2. Birmingham Crossplex - Birmingham, AL
3. Boo Williams Sportsplex - Hampton, VA
4. Legacy Park Multipurpose Center - Alachua, FL
5. Myrtle Beach Sports Center - Myrtle Beach, SC
6. Pasco Sports Complex - Pasco County, FL
7. Virginia Beach Sports Center - Virginia Beach, VA

## Convention & Meeting Facilities

8. Best Western Grand Gateway - Gainesville, FL
9. Hilton University of Florida - Gainesville, FL
10. Ocean Center - Daytona Beach, FL
11. Turnbull Florida State Conference Center - Tallahassee, FL

## Event Centers (Concert & Arena Events)

12. Veterans Memorial Arena - Jacksonville, FL
13. O'Connell Center - Gainesville, FL
14. RP Funding Center - Lakeland, FL
15. Tucker Civic Center - Tallahassee, FL



Source: Google Maps



### 3. COMPETITIVE & COMPARABLE MARKET/FACILITY ANALYSIS: A. SPORTS FACILITIES





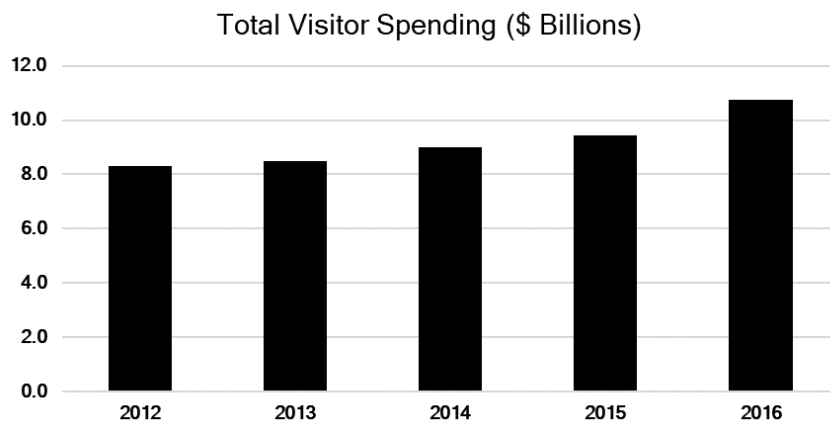
# SPORTS TOURISM TRENDS

## What is Sports Tourism?

Sports Tourism is regional or national travel to observe or participate in a sporting event. The typical sports tourism traveler is a family traveling via car within a 5-6 hour drive range for youth/amateur sports tournaments.

## Economic Impact of Sports Tourism

Visitor spending via sports tourism is typically captured via room nights/hotel spending, restaurants, retail, and local entertainment and cultural attractions. In 2016, US sports tourism eclipsed \$10 billion in annual visitor spending:



Visitor spending related to sports events was \$10.5 billion in 2016, a 10% increase from 2015 and 26% increase since 2012.

Source: National Association of Sports Commissions, 2017



# SPORTS TOURISM TRENDS (CONT.)

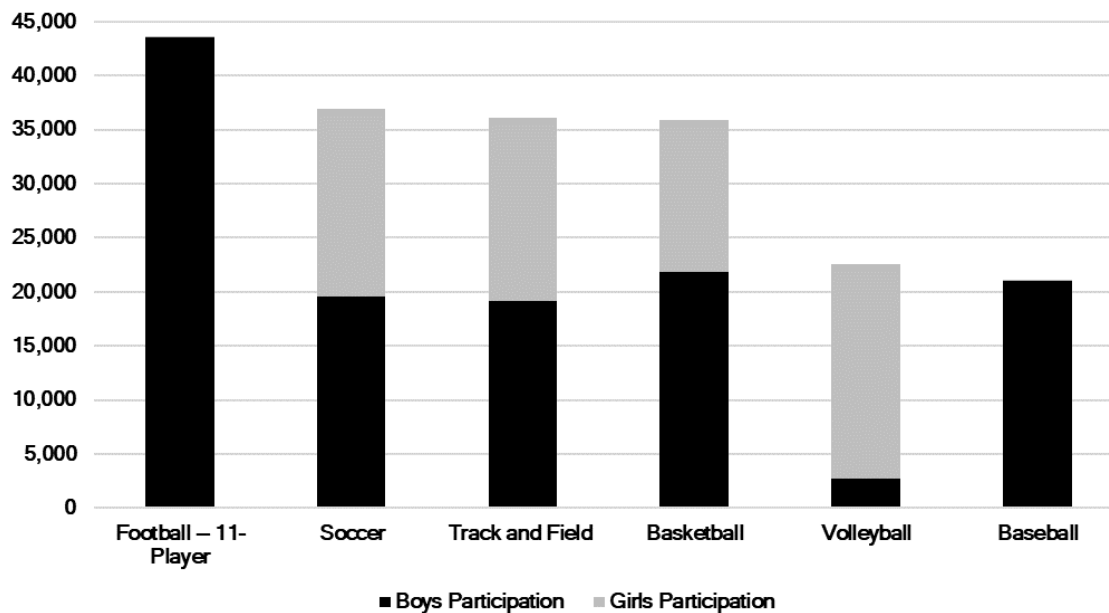
## Youth/Amateur Team Sports Participation

Sport	Participants
Soccer (Outdoor + Indoor)	9,828,000
Basketball	9,694,000
Baseball + Fast-Pitch Softball	8,333,000
Football (Tackle)	3,254,000
Gymnastics	2,809,000
Volleyball	2,680,000
Football (Touch)	2,032,000
Slow-Pitch Softball	1,004,000
Wrestling	805,000
Lacrosse	804,000
Rugby	301,000

*Note 1: Sorted by Participants / Note 2: Ages 6-Source: 2015 SFIA  
U.S. Trends in Team Sports Report*

As seen in the chart above, the three largest youth team sports categories in the U.S. by participation are currently soccer, basketball, and baseball/softball. Nationally, youth participation in football (both tackle and touch) has decreased considerably over the past decade. This trend could be correlated to fear of long-term health effects (concussions, etc.).

## High School Sports Participation in Florida



Source: National Federation of High School Associations

Note: Sorted by total participants in descending order

**Football** has the highest number of high school boy participants in Florida, while **Volleyball** have the highest number of high school girl participants. **Track and Field** has strong participation from both the boys and girls.



# SPORTS TOURISM TRENDS (CONT.)

## Sports Tourism Site Selection Factors

According to the NASC\*, tournament organizers focus on four (4) key factors when making their site selections:

- #1 ... Quality of Sports Venues
- #2 ... Proximity and Access
- #3 ... Hotels and Amenities
- #4 ... Reputation and Brand

In regards to these factors it should be noted that most tournament operators will not even consider a location that does not have the ideal venues they require (#1). Furthermore locating a new sports complex on a site with convenient access (#2 & #3) to the freeways and attractions would also be attractive for sports events. Lastly, reputation and brand (#4) within the sports tourism industry could be developed over time, once a sports complex is in place, by developing a track record of attracting and servicing successful events.

\* NASC: National Association of Sports Commissions

## Sports Tourism Site Selection Factors (Cont.)

### 1. SPORTS TOURISM VENUES



Alachua County currently lacks indoor sports facilities for sports tourism. This factor was confirmed through interviews with local stakeholders and sports tourism event organizers.

### 2. PROXIMITY & ACCESS



There are five large markets (with a population of more than 500,000 people each) within a 2.5-hour drive of Alachua County. An additional six large markets are within a 5-hour drive (overnight trip), with a total population within a 5-hour drive of Gainesville of nearly 15 million people.

### 3. HOSPITALITY AMENITIES



Nationwide, the Average Daily Rate (ADR) of hotels in 2017 was more than \$126 per night with 66% overall annual occupancy, whereas Alachua County hotel ADRs ranged from \$105 to \$145 per night throughout the calendar year, with occupancy rates ranging from approximately 59% to 79%.

### 4. REPUTATION



The Gainesville Sports Commission has a great reputation with regional and national event organizers. Additionally local groups have worked with the Commission to bring in events.



# SPORTS TOURISM TRENDS (CONT.)

## Key Trends Related to Quality Sports Tourism Venue Best Practices:

- *Location* - The majority of tournament and event organizers Victus has spoken with for numerous studies cite the venue's proximity to highways, hotels, restaurants, and retail as some of the most important factors in deciding where to host an event.
- *Quantity of Fields and/or Courts* - Victus has found that tournament and event organizers stress the preference for a facility that has at least eight fields (for outdoor sports) or eight basketball/volleyball courts (for indoor sports) to host larger events. These events tend to attract dozens or more teams which can equate to hundreds of rooms nights per event and thus spur a larger economic impact for the host community. Additionally, organizers prefer a venue where all its games can be held, rather than have participants travel to multiple venues in the same market.
- *Quality of Venues* - Victus has found that the quality of sports facilities tends to be the primary factor for sports tourism participants (athletes, coaches, and spectators) in determining which markets/destinations they prefer to visit for sports events.
- *Technology* - It is important that facilities be kept up-to-date in terms of technological features that make the facilities more attractive to event organizers, participants, and families, including free WiFi access at all facilities, modern sound systems and video displays, plug and play live streaming solutions, and digital marketing interactivity via Facebook, Instagram, etc.
- *Flexible Programming Opportunities* - Cheer/dance competitions, pickleball and other emerging sports need larger indoor space for events. In addition, eSports is a rapidly growing trend. Programming for esports can range widely from afterschool local clubs or groups to hosting professional tournaments and leagues. Esports is one of the fastest growing activities worldwide. Flexibility in floor modifications and scheduling can help fill year-round activity at sports venue.

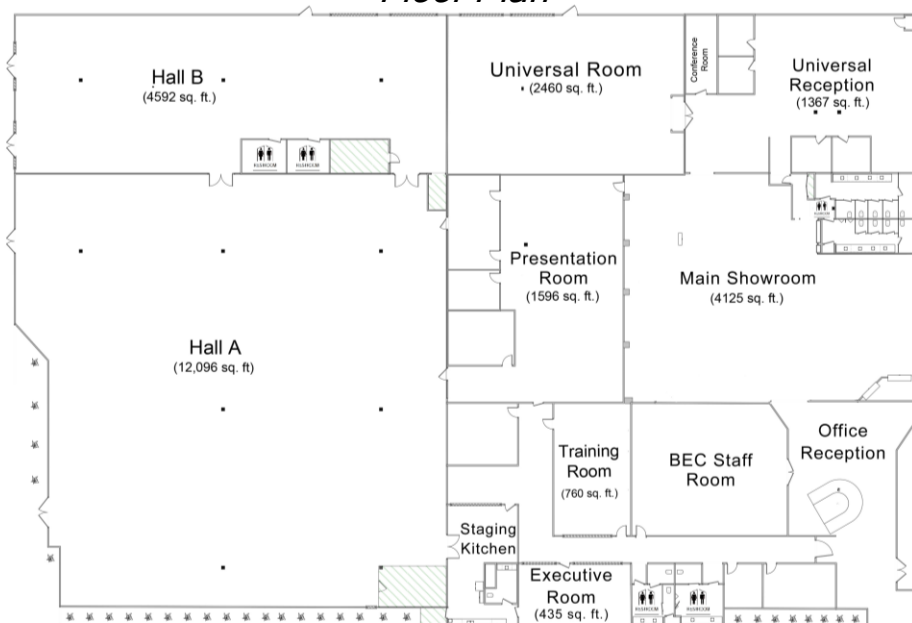
# THE BIG HOUSE

- Location: Tavares, FL
- Owner/Operator: Private
- Footprint: 162,000 sq. ft.
- Features:
  - 16 volleyball courts or 9 basketball courts
- Sample Events:
  - Basketball and volleyball tournaments/leagues

## THE BIGHOUSE



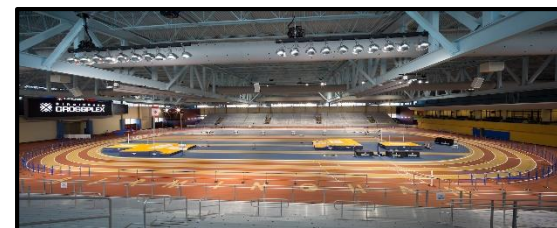
*Floor Plan*



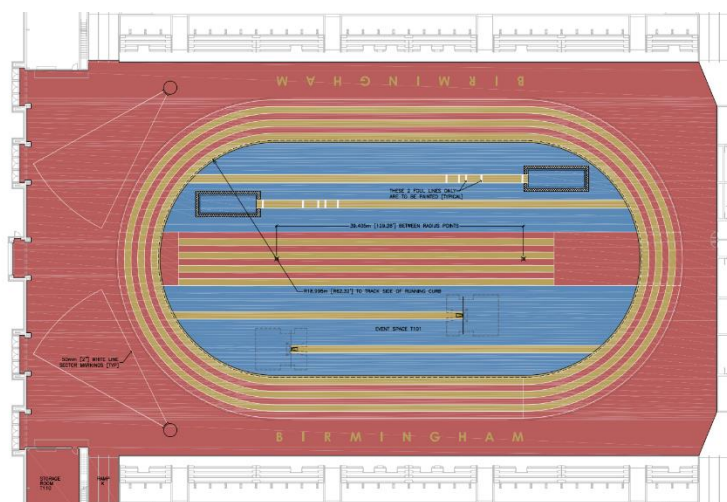
The Big House primarily hosts basketball and volleyball events. The venue has hosted several AAU events in these sports. Additional venue-sponsored leagues also play at the facility.

# BIRMINGHAM CROSSPLEX

- Location: Birmingham, AL
- Owner/Operator: City of Birmingham
- Complex Footprint: 221,000 sq. ft.
- Features:
  - 200-meter hydraulic banked indoor track
  - 9 volleyball courts (laid over track)
  - 4,000 seats and 7 VIP suites around track
  - Lynx timing system and 60' x 25' digital scoreboard
  - 5,000-seat arena, swimming facility, meeting space



*Floor Plan*



The Crossplex is one of the nearest indoor track facilities to Gainesville. The facility has hosted a variety of track events that include youth meets, high school state championships, regional and national club level championships, and collegiate invitations and championships. The Crossplex also hosts swim meets and volleyball tournaments.

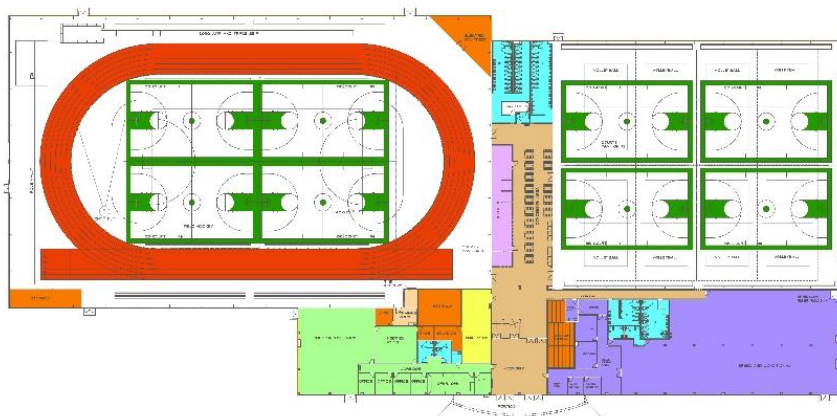


# BOO WILLIAMS SPORTSPLEX

- Location: Hampton, VA
- Owner/Operator: Public/Private Partnership
- Footprint: 135,000 sq. ft.
- Features:
  - 8 basketball courts or 12 volleyball courts
  - 8 indoor hockey fields
  - Cheerleading and gymnastics area
  - 6-lane flat indoor track
  - 4,000 retractable seats
  - Training rooms and facilities



*Floor Plan*



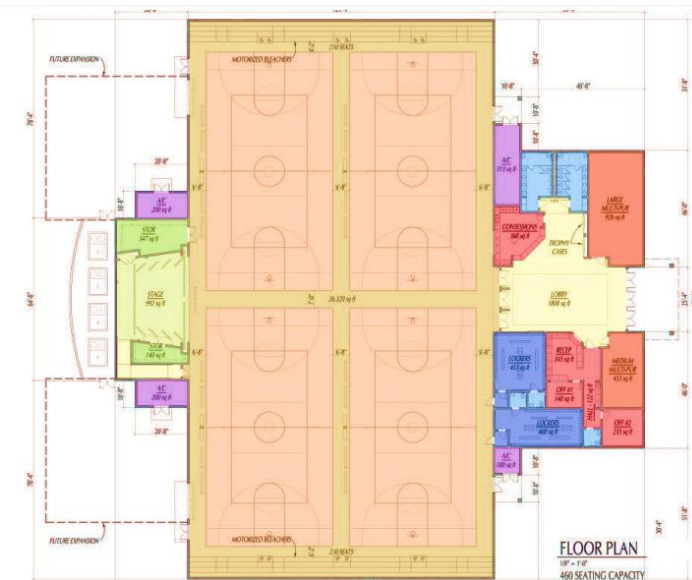
The Sportsplex hosts approximately 40 multi-day basketball tournaments as well other sports. According to a 2015 study, the Sportsplex generates over 15,000 annual room nights in Hampton.

# LEGACY PARK MULTIPURPOSE CENTER

- Location: Alachua, FL
- Owner/Operator: City of Alachua
- Footprint: 40,000 sq. ft.
- Features:
  - 4 basketball or volleyball courts
  - Performance stage and multipurpose rooms
- Sample Events:
  - Basketball and volleyball tournaments/leagues
  - Other community, cultural arts, and recreational events



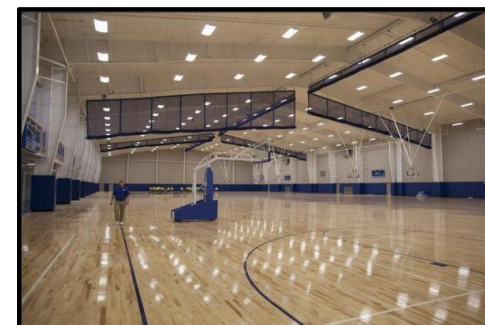
## *Floor Plan*



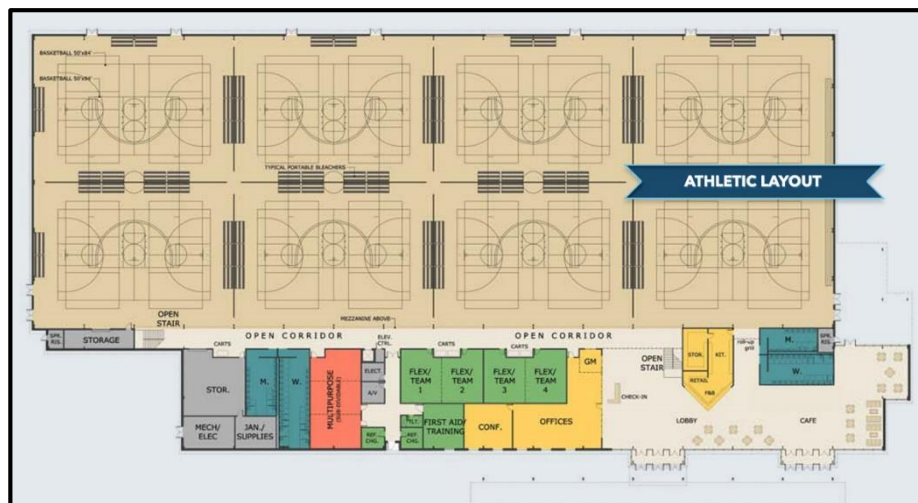
The Multipurpose Center opened in 2017. It is mostly used for local and community events. US Amateur Basketball used the courts for their national championship. A new event center could complement the Legacy Park venue and could partner together to host some larger events.

# MYRTLE BEACH SPORTS CENTER

- Location: Myrtle Beach, SC
- Owner/Operator: City of Myrtle Beach/Sports Facilities Management (SFM)
- Footprint: 100,000 sq. ft.
- Features:
  - 8 basketball or 16 volleyball courts
  - 4 flex rooms (meetings, locker rooms, etc.)
- Sample Events:
  - National and regional tournaments for basketball, volleyball, pickleball, wrestling, and gymnastics, etc.
  - Meetings and conventions



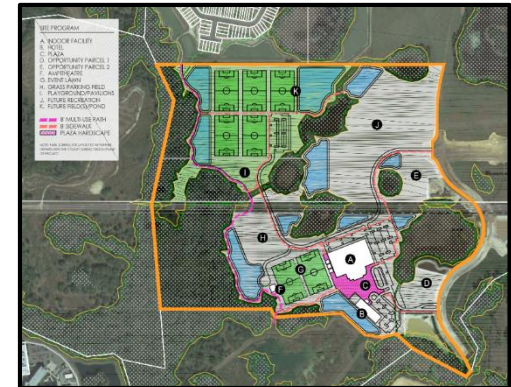
*Floor Plan*



The Sports Center is reconfigurable as a convention/meeting space. The Center opened in 2015 and hosts national and regional sporting events.

# PASCO SPORTS COMPLEX AT WIREGRASS

- Location: Pasco County, FL
- Owner/Operator: Radd Sports
- Footprint: 98.000 sq. ft.
- Features:
  - 8 basketball courts
  - Cheerleading and gymnastics area
  - Fitness center
  - Hotel - 100+ room Marriott-branded hotel
  - Amphitheater and outdoor sports fields / event lawn



## Floor Plan



The Sports Complex is under construction and estimated to be completed in Fall 2019. The venue is approximately 100 miles south of Gainesville.

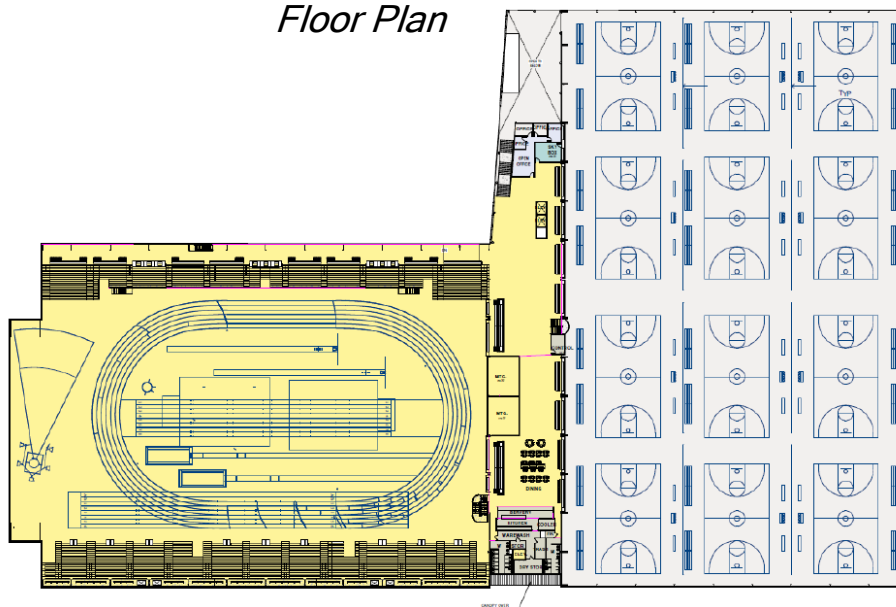


# VIRGINIA BEACH SPORTS CENTER

- Location: Virginia Beach, VA
- Expected completion: Fall 2020
- Owner/Operator: Public/Private
- Footprint: 285.000 sq. ft.
- Features:
  - 12 basketball or 24 volleyball courts
  - 1 hydraulic banked track with 5,000 fixed seats
  - Flexible floor space for other sports such as gymnastics



*Floor Plan*



The Virginia Beach Sports Center is estimated to be completed in Fall 2020. The total construction project, including the construction of a parking garage, is budgeted in excess of \$60 million.



# SUMMARY OF SPORTS FACILITIES



Facilities:	Location:	Court/Field Inventory					Square Footage
		Basketball	Volleyball	Cheer/Gym	Indoor Fields	Indoor Track	
The Big House	Tavares, FL	9	16	-	-	-	162,000
Birmingham Crossplex	Birmingham, AL	-	9	-	-	1	221,000
Boo Williams Sportsplex	Hampton, VA	8	12	1	8	1	135,000
Legacy Park Multipurpose Center	Alachua, FL	4	4	-	-	-	40,000
Myrtle Beach Sports Center	Myrtle Beach, SC	8	16	-	-	-	100,000
Pasco Sports Complex	Pasco County, FL	8	-	1	-	-	98,000
Virginia Beach Sports Center	Virginia Beach, VA	12	24	1	-	1	285,000
<b>AVERAGE</b>		8	14	1	8	1	148,714
<b>MEDIAN</b>		8	14	1	8	1	135,000

Source: Victus research

Note: Sorted by Facilities in alphabetical order

## COMPARATIVE SPORTS FACILITY NOTES

As shown above, facilities capable of hosting regional, multi-day tournament activity typically have at least eight (8) courts or fields. The dedicated sports court facilities with at least 8 courts (and no indoor track) range from approximately 98,000 to 162,000 square feet.

The three facilities with indoor tracks also have the ability to host other sports activity when indoor track is not in season. The indoor track venues range from 135,000 to 285,000 square feet. It should be noted that the larger track facilities in terms of square footage (Birmingham and Virginia Beach) feature larger seating capacities upwards of 5,000 people to host major NCAA track and field meets.

In order to accommodate indoor sports courts, trade shows/expos, and indoor track with spectator seating for regional meets, it is likely that a new multi-use event center in Gainesville would require a larger square footage than the County's preliminary facility concepts (of approximately 92,000 sq. ft.).



### 3. COMPETITIVE & COMPARABLE MARKET/FACILITY ANALYSIS: B. CONVENTION & MEETING FACILITIES



## Conference/Meetings Industry & Event Types

Conference/meeting events are held throughout the country and are opportunities for business, religious groups, etc. to network and share best practices among other initiatives. The various conference and meeting event types can typically be defined as follows:

- *Banquet* - Generally formal celebrations organized by a company or organization to celebrate achievements within the organization and to boost employee and member morale. Typically require carpeted venues with banquet catering capabilities.
- *Meetings & Conferences* - Meeting or gathering of a company/organization of a shorter duration than a convention and designed to meet a specific objective. Typically held in carpeted venues.
- *Convention* - A large gathering of people with a shared interest. These events are usually scheduled at a specific time each year. Conventions typically have presentations that familiarize attendees with advancements or trends within a their particular field of interest. Often held in large convention facilities with both carpeted and concrete/flat floor space.
- *Expositions (Expos)* - Large scale exhibition or expositions are typically conducted in column-free, concrete floor space, such as a convention hall or arena/event center with retractable seating.
- *Trade Shows* - These event types are an opportunity for companies to exhibit some of their latest products, as well as yet to be released prototypes to journalists as well as others in the industry. Typically conducted in column-free, concrete floor space, such as a convention hall or arena/event center with retractable seating.





## Typical Venues for Expos & Trade Shows

As noted on the prior page, in order to attract larger events such as conventions, expos, and trade shows, a large, column-free, flat-floor space is required. It is worth noting that the current Alachua County meeting/event facilities (which are highlighted in this section) are not big enough spaces to host these larger events, with no individual indoor conference/meeting space larger than 6,900 square feet in the County. Based upon a review of Alachua County's market characteristics and preliminary concept plans for a multi-purpose event center, Victus Advisors believes that a multi-purpose event center in Alachua County could utilize retractable seating to create a larger, concrete flat-floor space than currently exists in the County to appeal to small/medium-sized conferences, trade shows, and expos. Please note that Section 4 of this report contains interview highlights from some of these event types.

## Economic Impact

Oxford Economics recently released data regarding the meetings and events industry for 2016. It found that the industry had the following economic impact:

- 1.9 million meetings were held in 2016 with over 250 million participants
- Meetings generated 300 million room nights
- \$325 billion of direct spending and \$845 billion in business sales
- International attendees represented only two percent of total attendees, but accounted for 11 percent of spending



## Facility Trends

The International Association of Venue Managers (IAVM) highlights the following five (5) key trends that would impact convention venues in 2017:

1. Greater diversity of events at each facility
2. Improved food and beverage options on site
3. Differentiate facility by promoting surrounding areas (nightlife, restaurants, lodging, etc.)
4. Technological amenities such as virtual tours and 3D mapping
5. Provide flex space at facility that allow for interactive events or other entertainment to engage attendees

It should be noted that having the requisite space and total number of hotels and committable sleeping rooms is still the primary driver for securing these events, however these trends can help differentiate facilities within a crowded market. It is highly recommended that Alachua County consider these factors when designing a new multi-use event center.

# BEST WESTERN GATEWAY GRAND

- Location: Gainesville, FL
- Owner/Operator: Private
- Features:
  - 8,000 sq. ft. of total meeting space on-site at hotel
- Sample Events:
  - Weddings, parties, corporate meetings



The hotel has several different sizes of meeting rooms to accommodate smaller events such as weddings, banquets/parties, or corporate gatherings.



# HILTON UNIVERSITY OF FLORIDA CONFERENCE CENTER

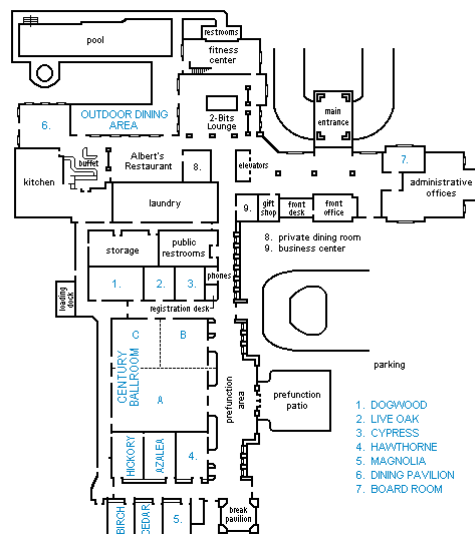


- Location: Gainesville, FL
- Owner/Operator: Hilton
- Features:
  - 25,000 sq. ft. of total meeting space
  - Largest single room is 6,860 sq. ft.
- Sample Events:
  - Meetings, conferences, events, and weddings



## Floor Plan

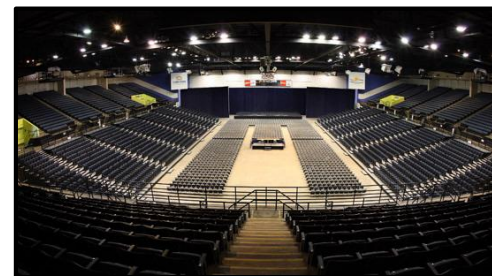
HILTON GAINESVILLE / UNIVERSITY OF FLORIDA CONFERENCE CENTER  
MAIN LEVEL



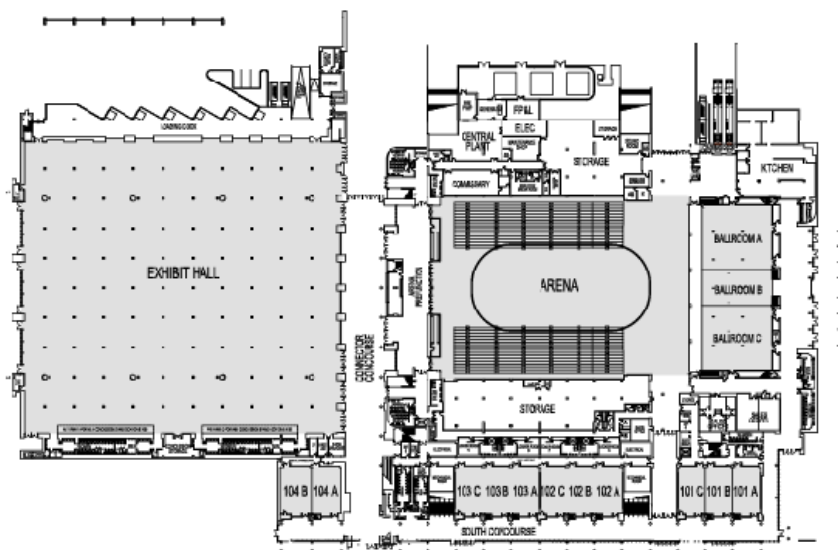
The hotel is located adjacent to the University of Florida and near I-75 in Gainesville. The conference center hosts events ranging in size from small meetings to conferences.

# OCEAN CENTER

- Location: Daytona Beach, FL
- Owner/Operator: Volusia County
- Features:
  - 205,000 total sq. ft.
  - Arena, ballroom, exhibit hall, 32 breakout rooms
- Sample Events:
  - Banquets, trade shows, sporting events, graduations, conventions, etc.



*Floor Plan*



The Ocean Center has a convention center with a main exhibit hall, a sports arena, as well as other additional rooms for presentations or meetings. The Center's proximity to the beach is a draw for many visitors.



# AUGUSTUS B. TURNBULL III FLORIDA STATE CONFERENCE CENTER



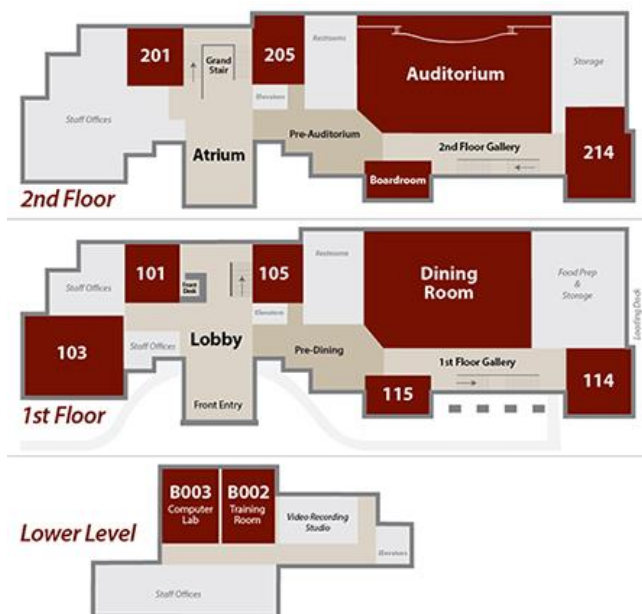
- Location: Tallahassee, FL
- Owner/Operator: Florida State University
- Features:
  - 350-seat auditorium, a 280-seat dining room
  - 47,000 sq. ft. of total space
- Sample Events:
  - Conferences, meetings, professional & community events



Augustus B. Turnbull III  
FLORIDA STATE CONFERENCE CENTER



## Floor Plan



The Conference Center is located near to the Tucker Civic Center. The Center hosts both university and non-university events.



# SUMMARY OF MEETING FACILITIES

<u>Facilities:</u>	<u>Location:</u>	<u>Total Size (Sq. Ft.)</u>	<u>Meeting Rooms</u>	<u>Events Served</u>
Best Western Gateway Grand	Gainesville, FL	8,000	6	Meetings, conferences, parties, weddings
Hilton University of Florida	Gainesville, FL	25,000	10	Meetings, conferences, events, weddings
Ocean Center	Daytona Beach, FL	205,000	32	Conventions, expos, large meetings, indoor sports
Turnbull Florida State Conference Center	Tallahassee, FL	47,000	11	Meetings, conferences, events, weddings
<b>AVERAGE</b>		71,250	15	
<b>MEDIAN</b>		36,000	11	

*Source: Victus research*

*Note: Sorted by Facilities in alphabetical order*

## COMPARATIVE MEETING FACILITY NOTES

As shown above, the facilities analyzed have meeting rooms ranging from six (6) to 32 and square footage between 8,000 and 205,000.

Many larger facilities have multiple venues/rooms to accommodate flat floor (trade shows, expos) in large column free space, plus carpeted meeting and banquet rooms of varying sizes for meetings and conferences. Whereas, venues in mid-size markets tend to be more focused on a particular sector of the convention industry, such as fully-carpeted facilities that cater to meetings and associations, etc.

Gainesville currently only has venues that can accommodate smaller meetings/conferences. The two facilities have carpeted meeting spaces, however Alachua County is unable to attract larger events such as conventions and trade shows that require flat, concrete floors.



### 3. COMPETITIVE & COMPARABLE MARKET/FACILITY ANALYSIS: C. EVENT CENTERS





# CONCERT & ARENA EVENTS

In addition to sports activity, expos, and trade shows, many multi-purpose event centers also host a significant annual calendar of concerts, family shows, and other entertainment events.

## Concerts

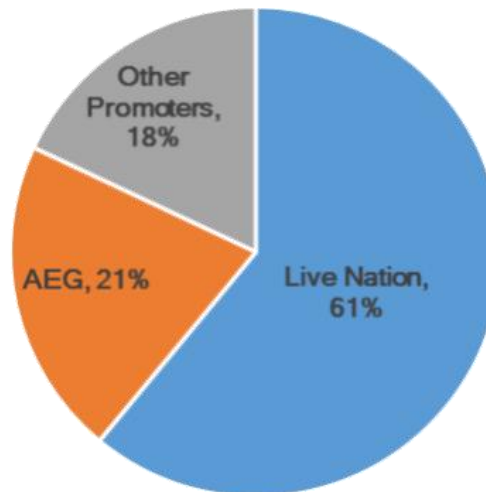
Analysis of the Gainesville competitive landscape indicates that the O'Connell Center is the only venue in the marketplace that can accommodate large, touring concerts, which typically book arenas/event centers ranging from 5,000 to 20,000 seats, with large marshalling areas for staging and numerous dressing rooms for talent. However, the O'Connell Center lost some rigging capacity during its recent renovation, and O'Connell Center staff indicated that the Gainesville market is not considered a strong concert market by promoters.

## Family Shows

Family shows are events typically held in arenas/event centers that cater to spectators of all ages and include a wide variety of events including Sesame Street Live, Circuses, and Ice Shows, among others. A new venue's ability to attract events such as family shows will depend somewhat on the physical characteristics of the facility as well as the demographic make-up of the local population. Based upon our experience in the arena/event center industry, most family shows prefer to rent larger arenas (8,000 or more seats) for multiple days in that market, while hosting several daily shows.

## U.S. Concert/Entertainment Market Share

It is estimated that Live Nation and AEG control approximately 82% of the arena/event center performance market in the United States (as seen in the pie chart below), giving them significant influence over both talent booking and the selection of concert venues for tours. As such, the most successful concert venues tend to have long-term operating or booking agreements with Live Nation or AEG.



*Source: Pollstar*

*Note: Market share by 2016 ticket sales*

As a result of all the factors described above and on the previous slide, it is expected that a new multi-purpose event center in Alachua County would not consistently attract touring concert and family show activity. Any concert activity held in the facility is likely to be smaller, local concert activity.

- Location: Jacksonville, FL
- Owner/Operator: City of Jacksonville
- Arena Floor Footprint: 27,000 sq. ft.
- Features:
  - 15,000 seat arena
- Sample Events:
  - Concerts, shows, meetings, expos, sporting events



## Floor Plan



The Arena hosts large concerts and is also home to multiple minor-league sports franchises. The arena is within approximately 80 miles of Gainesville and represents one of the nearest major markets to Alachua County.

# STEPHEN C. O'CONNELL CENTER

- Location: Gainesville, FL
- Owner/Operator: University of Florida
- Arena Floor Footprint: 20,000 sq. ft.
- Features:
  - 10,136 seat arena
  - Additional 25,000 sq. ft. (concourse level) available for exhibit space
- Primary Events:
  - University of Florida athletics, graduations



## *Floor Plan*



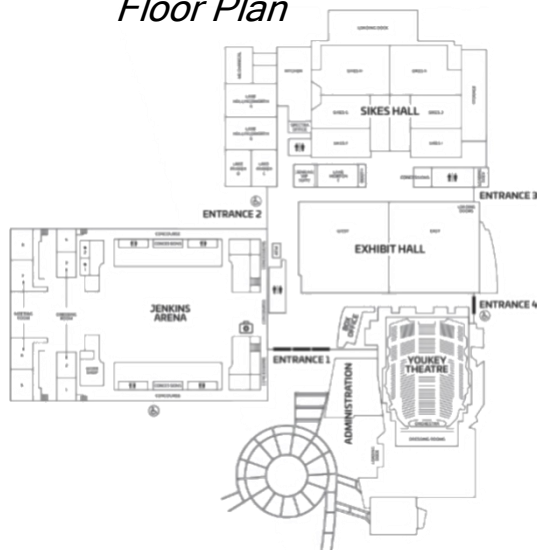
The O'Connell Center's events have changed since its renovation. The facility now prioritizes University of Florida athletics events and graduations.

# RP FUNDING CENTER

- Location: Lakeland, FL
- Owner/Operator: City of Lakeland
- Arena Floor Footprint: 25,000 sq. ft.
- Features:
  - 4,600 seat arena
  - 2,226 seat theatre
  - 100,000 sq. ft. of total exhibit space
- Sample Events:
  - Concerts, shows, meetings, expos, sports tournaments and events (Lakeland Magic)



*Floor Plan*



The Center is the home of the NBA G-League Lakeland Magic. The Center's arena, theater, and convention space allow for flexibility in hosting a wide variety of events, tournaments, and shows.

# DONALD L. TUCKER CIVIC CENTER

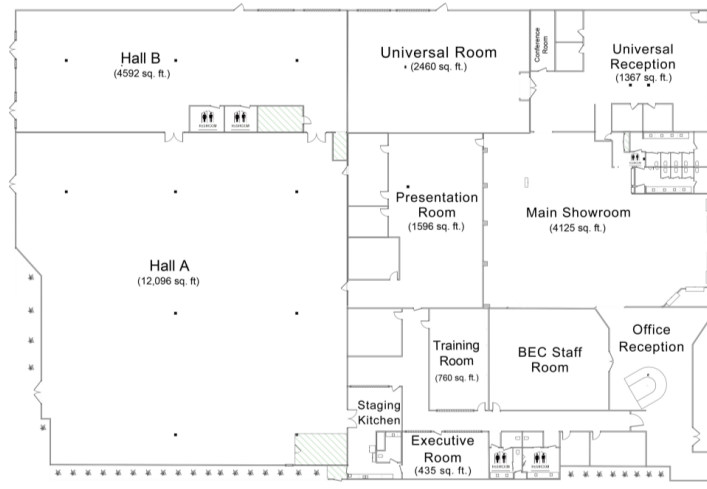
- Location: Tallahassee, FL
- Owner/Operator: Florida State University
- Arena Floor Footprint: 18,900 sq. ft.
- Features:
  - 12,500 seat arena
  - 4 meeting rooms
  - 1 exhibit hall
  - 70,000 sq. ft. of total exhibit space
- Sample Events:
  - Concerts, meetings, expos, Florida State athletics



**Donald L. Tucker Civic Center**  
FLORIDA STATE UNIVERSITY



## *Floor Plan*



The Civic Center has a different configurations and additional room space to host different types of events and expos.





# SUMMARY OF ENTERTAINMENT FACILITIES

<b>Facilities:</b>	<b>Location:</b>	<b>Arena Seating Capacity</b>	<b>Arena Floor Space Sq. Ft.</b>	<b>Max Exhibit Floor Space Sq. Ft.</b>	<b>Events Served</b>
Jacksonville Veterans Memorial Arena	Jacksonville, FL	15,000	27,000	27,000	Events, concerts, professional sports
O'Connell Center	Gainesville, FL	10,136	20,000	45,000	Events, university athletics, graduations
RP Funding Center	Lakeland, FL	4,600	25,000	100,000	Events, concerts, meetings, professional sports
Tucker Civic Center	Tallahassee, FL	12,500	18,900	70,000	Events, concerts, university athletics
<b>AVERAGE</b>		10,559	22,725	60,500	
<b>MEDIAN</b>		11,318	22,500	57,500	

*Source: Victus research*

*Note: Sorted by Facilities in alphabetical order*

## COMPARATIVE ENTERTAINMENT FACILITY NOTES

As shown above, the facilities analyzed have arena floor space square footage between 18,900 and 27,000. Max exhibit floor space square footage is between 27,000 and 100,000.

Each of these facilities hosts similar events such as professional and collegiate sporting events, concerts, and other entertainment events.



# KEY TAKEAWAYS FOR GAINESVILLE

- The most important factors for attracting **Sports Tourism** are a) the quality of sports venues, b) proximity and transportation access, and c) hotels and hospitality amenities. The Sports Tourism industry is large and growing, and a tournament-caliber sports facility could have a significant impact on Alachua County if a venue is large enough (ideally with at least 8 indoor basketball/volleyball courts and indoor track capabilities) and located within close proximity of highways, hotels, and other hospitality amenities.
- **Expos and Trade Shows** are typically conducted in column-free, concrete floor space, such as a convention hall or arena/event center with retractable seating. Victus Advisors believes that a multi-purpose event center in Alachua County could utilize retractable seating to create a larger, concrete flat-floor space than currently exists in the County to appeal to small/medium-sized conferences, trade shows, and expos. Requisite floor space and total number of hotels with committable sleeping rooms are the primary drivers for securing these events, however trends such as a) flexibility to host a greater diversity of event types, b) improved food and beverage options, and c) appealing surrounding areas (with nightlife, restaurants, lodging, etc.), can help differentiate facilities within a crowded market.
- Due to the size of the Alachua County market and the nature of the concert/entertainment event industry, it is expected that a new multi-purpose event center in Alachua County would not consistently attract touring **Concert and Family Show** activity. Any concert activity held in the facility is likely to be smaller, local concert activity.
- In order to accommodate indoor sports courts, trade shows/expos, and indoor track with spectator seating for regional meets, it is likely that a new multi-use event center in Alachua County would require a larger **Square Footage** than the County's preliminary facility concepts (of approximately 92,000 sq. ft.).





## 4. INTERVIEW SUMMARIES



# INTRODUCTION



As a key part of our market research process, Victus Advisors conducted two types of interviews:

- A. One-on-One Interviews in Alachua County with key stakeholders from 15 community groups and organizations.
- B. Telephone Interviews with 21 individuals from potential event center user groups.

These interview results were used by Victus Advisors to provide input to our market demand study.

Key highlights from each type of interview are presented within this section.



## 4. INTERVIEW SUMMARIES: A. ONE-ON-ONE INTERVIEWS



# ONE-ON-ONE INTERVIEWS



In September 2018, Alachua County identified participants and scheduled a series of one-on-one interviews for Victus Advisors. The goals of these interviews were to gather feedback from key stakeholders and community leaders regarding the market potential for a new event center in Gainesville. The set of topics and questions included perceptions of Alachua County and its current event venue offerings, possible comparable and competitive venues and markets, and other feedback concerning the potential new event center.

**ONE-ON-ONE INTERVIEWS** - Victus Advisors conducted in-person interviews with representatives from the following 15 groups:

- Alachua County Commission
- Alachua County Hospitality Council
- Alachua County School Board
- Alachua County Tourist Development Council
- City of Gainesville
- Economic Development Advisory Council
- Florida Community Design Center
- Gainesville Chamber of Commerce
- Gainesville Sports Commission
- O'Connell Center
- Plan East Gainesville
- Radd Sports
- Recreation & Open Space Advisory Committee (ROSCO)
- Roller Rebels
- Stephen Foster Neighborhood

Key highlights of these interviews are summarized by topic in the following pages. The highlights presented tend to focus on the topics and sentiments that were raised by multiples interviewees.



# INTERVIEW SUMMARIES

## Perceptions of Current Event Facilities in Alachua County

Almost every interviewee mentioned the O'Connell Center as the primary event venue in Alachua County. Since the renovation of the O'Connell Center, several events have been displaced from the venue including indoor track and field events, Cirque du Soleil, and some exhibition shows. Several people mentioned that the O'Connell Center is not easily accessible to groups outside of the University of Florida. Booking of the facility must be made up to a year in advance for non-university events and is cost prohibitive for some organizations. In the past, the County had depended on the O'Connell Center as its sole event venue. The Center still hosts school graduations and only a few concerts.

Other people interviewed brought up hotels as another option for meetings in Gainesville. An individual said that the hotels can only hold up to 500 people per event, which limits the size and number of events that can be held in the City.

The Legacy Park Multipurpose Center was another venue mentioned by interviewees. The Center is located in and owned by the City of Alachua. The primary focus of the Center is to serve the needs of the local community. It hosts many recreational, cultural arts and community events.



# INTERVIEW SUMMARIES (CONT.)



## Perceptions of Current Event Facilities in Alachua County (Cont.)

Many expressed that Gainesville lacks a space for local meetings, conventions, and conferences. One interviewee mentioned that some companies must go to other markets (Orlando and Jacksonville) for employee events and conferences.

A concert venue (outside of the O'Connell Center and University concerts) is not present in the market. Some indicated their desire for such a venue while others do not see Gainesville as a significant market for concerts.

Overall, many feel that the current inventory of event facilities in Alachua County is lacking. Those who were interviewed expressed their opinion that there is a demand and need for a new event space in Alachua County.



# INTERVIEW SUMMARIES (CONT.)

## Competitive Markets

Florida cities and markets made up the majority of responses regarding markets competitive to Alachua County. Ocala (Marion County) and Tallahassee (Leon County) were cited by many as the nearest and most comparable markets. One interviewee said that Ocala and Marion County are planning to develop a new event center.

Other larger markets such as Jacksonville, Orlando, St. Petersburg, and Tampa were mentioned as cities where Alachua County residents go for concerts and that are a relatively easy drive from the County. Other Florida markets that were mentioned include Daytona Beach, Pensacola, St. Lucie, and St. Augustine.

Indoor track and field interviewees named the other closest indoor track facilities that are used since the O'Connell Center renovations displaced the indoor track. Birmingham, AL and Winston-Salem, NC were mentioned as other indoor tracks currently used. The in-development indoor track facility in Virginia Beach, VA was also mentioned, which will open in 2020.



# INTERVIEW SUMMARIES (CONT.)

## Support for New Multi-Purpose Event Center

Almost all interviewees were in favor of a new event center of some kind in the County. Many of those interviewed said that there is not much opposition to its development. Several people mentioned that there is a need and a demand for a facility that can host concerts, expos, meetings, sports, and trade shows. Many comments aligned with the sentiment that there is a lack of facilities in the County to host these types of events. Others commented that the potential event center should be flexible enough to host different types and sizes of events.

An individual expressed that people are tired of traveling to Jacksonville and other markets for events. Another person said that a new event center could pick up small trade or expo events from larger markets.

Some feel that there is an excess supply of hotel rooms and retail in Gainesville that could be utilized with a project like the new event center. Some people mentioned that a new facility could have a strong economic impact in the community.





# INTERVIEW SUMMARIES (CONT.)

## Concerns about New Multi-Purpose Event Center

The most common concern voiced by interviewees about the new event center was the potential location of the facility. Many felt the facility should be located conveniently to highways, hotels, retail, and restaurants, so as to maximize it's appeal to tourism events that drive economic impact. Whereas others felt that the facility could be located in an underdeveloped area as a means of driving economic impact to new areas of the County.

Multiple people said that the facility should be accessible to the community, both in terms of scheduling and cost.

Another interviewee questioned if Gainesville would have enough attractions and amenities for the event center to be booked year-round.

An interviewee mentioned that there is some concern that a new facility could compete with the O'Connell Center, and thus it should be designed to be complementary, not competitive.

Some people interviewed said that a concert venue is needed in the County and that they support a facility that can host concerts. Whereas others indicated that Gainesville is a weak concert market and do not see a new facility drawing concerts.



# INTERVIEW SUMMARIES (CONT.)

## Event Center Location

Many people interviewed think that the new event center should be in a location with easy access to hotels, retail, and dining options. Several interviewees indicated that anywhere along the highly-trafficked I-75 corridor would be great due to ease of access to these same amenities.

A few people interviewed said that an event center would be used by local groups regardless of where it was built. However, other interviewees felt that the wrong location would hurt the long-term sustainability of the facility, especially as an attraction for out-of-town visitors.

A shared sentiment among many people interviewed is that there is demand to build a new event center on the west side of the County due to existing economic development there, and that the east side of the County does not offer as many amenities and infrastructure support for such a facility. A few interviewees specifically suggested Celebration Pointe as a good location for the potential facility, due to its proximity to hotel, retail, and dining, as well as I-75 access.

The Martin Luther King (MLK) site was another location mentioned by many interviewees. The proximity to Citizens Field was mentioned as both a potential positive and negative attribute by different people. Some said the site is already heavily used and developed, and multiple people mentioned that parking at the site could be an issue. However, one person said a parking garage could help solve parking issues, and another individual mentioned that an event center in this area could provide positive economic opportunities for east-side residents.



# INTERVIEW SUMMARIES (CONT.)



## Location (Cont.)

The Koppers site was also mentioned by interviewees as a potential location for a new event center. Many said they are concerned about the environmental safety of the site. A few interviewees said that the site provides a good opportunity for revitalization. Other people mentioned that the size of this site is favorable for simultaneously providing both development opportunities and open space around the center.



## 4. INTERVIEW SUMMARIES: B. TELEPHONE INTERVIEWS



# TELEPHONE INTERVIEWS



In October 2018, Victus Advisors held telephone interviews with operators, promoters and influencers of sports, entertainment, and trade show/conference events both regionally and nationwide. The topics included ideal amenities, potential events that could be held at the new event center, and other feedback related to the facility. In all, Victus Advisors engaged with 21 individuals from local, regional, and national organizations.

Victus Advisors conducted telephone interviews with representatives from the following groups:

- AAU Florida Gymnastics
- AAU Strength Sports
- Builders Association of North Central Florida
- Firefighter Challenge
- Florida Gun Shows
- Florida High School Athletics Association
- Florida RV Trade Association
- Florida Sports Foundation
- Gainesville Fine Arts Association
- Gainesville Juniors Volleyball
- Gainesville Native American Festival
- Gainesville Regional Airport
- Junior Volleyball Association
- Jimmy Carnes Indoor Track & Field Meet
- Legacy Park Multipurpose Center
- National Association of Intercollegiate Athletics (NAIA)
- Sun Country Sports Center
- Sunshine State Games
- Track & Field
- US Amateur Basketball
- USA Weightlifting



# PHONE INTERVIEW SUMMARIES

- **AAU Florida Gymnastics:**
  - AAU hosts meets across the state of Florida in addition to a state-wide meet every other year. A bidding process is conducted for the group's competitions. The representative indicated that Florida is a hotbed for gymnastics and people are always looking for new sites across the state. A new venue in Gainesville could host large or small gymnastics meets.
- **AAU Strength Sports:**
  - AAU Strength Sports hosts events that include weightlifting, power lifting, and body building. The representative said Florida is a hub for indoor sports. A market like Gainesville could attract and host several smaller health and fitness conventions or other sports tournaments that weightlifting competitions could be a part of. These competitions do not call for the entire floor space of most venues and would sublease their space at other events.
- **Builders Association of North Central Florida (BANCf):**
  - BANCf is a trade organization that holds monthly networking meetings and an annual end-of-the-year meeting in Gainesville. They have previously used hotels and the University of Florida for their meetings. The representative from BANCf indicated that they want lower prices and more flexibility in their meeting spaces than what hotels currently offer. Because their monthly meetings are over lunch, a centrally-located venue near I-75 is most convenient for them and their members. BANCf would also like to see an event center with adequate parking and an all-inclusive price as opposed to extra fees. If the price were lower than their current venues, BANCf could consider moving some or all of their meetings to the new event center.



# PHONE INTERVIEW SUMMARIES (CONT.)

- **Firefighter Challenge:**
  - The Firefighter Challenge is an event that showcases firefighter skill competitions. The group needs at least a 200' x 300' space and room for their five-story structure used in competitions. Because of these requirements, the events are held outdoors and typically do not work in indoor facilities. The group has previously expressed interest in the project depending on if the parking lot were designed in a way to meet their event requirements.
- **Florida Gun Shows:**
  - Florida Gun Shows hosts weekend gun shows across the state of Florida. The company typically utilizes convention centers or fair grounds with floor space between 30,000 and 50,000 square feet with adequate parking. On average, their events draw around 5,000 attendees with most living within 40 miles of the host site. The company representative said that Gainesville is a place they could host between three and four shows annually.
- **Florida High School Athletics Association (FHSAA):**
  - FHSAA hosts indoor state championships for basketball (boys and girls), competitive cheer, volleyball (boys and girls), weightlifting, and wrestling. The organization said that a host site typically will not host more than one or two state championships per year. FHSAA is headquartered in Gainesville and has worked with the Gainesville Sports Commission on past events. A venue in Gainesville has adequate parking and seating around a marquee court could host a state high school championship in an indoor sport annually.





# PHONE INTERVIEW SUMMARIES (CONT.)

- **Florida RV Trade Association (FRVTA):**
  - FRVTA assists regional chapters in hosting RV shows throughout the state of Florida. These shows are held in large, open spaces outdoors. These sites are sometimes difficult to find or expensive nearer to large population centers. Parking lots and fairgrounds are some venues the group typically uses. An event center would not fit their needs unless the parking footprint for the new event center was adequate for their shows. The RV shows also have geographic limitations imposed by RV manufacturers that could potentially hinder a new location from being used.
- **Florida Sports Foundation:**
  - The Foundation works to assist Florida's communities with securing, hosting and retaining sporting events and sports-related business that generate significant economic impact and tourism. The group was involved with the basketball championships for the Sunshine State Games held in Alachua County. A facility with multiple basketball courts would be ideal for hosting more tournament activity.
- **Gainesville Fine Arts Association (GFAA):**
  - A member of the GFAA indicated that the organization is looking for a new host for an annual local art show. The group has previously used Tioga Town Center as the site for this show, but can no longer use this venue. The group desires an open space, preferably indoor. Easy and convenient access for artists to bring in displays is essential for any space they use.



# PHONE INTERVIEW SUMMARIES (CONT.)

- **Gainesville Juniors Volleyball:**
  - The local volleyball club has been leasing their currently 20,000 square foot facility for the past seven years. The representative stated that there is a lack of space to run a high-level volleyball tournament in Gainesville. The group has been in contact with the Sports Commission about being a partner in the proposed facility. The group representative said that an eight-court facility would meet his club's needs as well as provide the opportunity to host three to four mid-sized volleyball tournaments annually.
- **Gainesville Native American Festival:**
  - The event will be held in Gainesville for the first time in March 2019. The fairgrounds will be the site of the festival. The same group has done a similar event for the past six years in Brooksville. The group is mostly interested in an outdoor space to hold its festival with plenty of parking, a pavilion space, and RV hookups. The typical attendance for the Brooksville event is between 7,000 and 8,000 with an estimated 40% of people coming from beyond 50 miles of Brooksville.
- **Gainesville Regional Airport:**
  - A representative from the Gainesville Airport has expressed interest in potentially partnering with the County on this project. The airport is in a position to add a new parking structure and thinks that the structure could possibly be shared with a new event center if it were built adjacent to the airport. There is an availability of land near the airport and possible state funds that could be used towards the joint project.



# PHONE INTERVIEW SUMMARIES (CONT.)



- **Junior Volleyball Association (JVA):**
  - JVA has spoken to representatives from Gainesville and the Central Florida Sports commission about bringing volleyball tournaments to the southeast. JVA has competitors that use Orlando venues to host tournaments. They are looking for a venue with 30-40 courts under one roof, but could use less courts to host smaller tournaments. They also look for good hotel and sports commission partners as well as other family entertainment options in a host city.
- **Jimmy Carnes Indoor Track & Field Meet:**
  - A local representative involved with the meet spoke to Victus. The indoor meet was discontinued after the O'Connell Center renovations. The Meet would take place over five weekends at a new event center. The representative indicated that an indoor banked track could host not only the Jimmy Carnes meet, but possibly three collegiate and two other youth meets during the year. The individual also expressed the desire for seating (flexible or permanent), space for team tents, and a dedicated person to be in charge of the facility.
- **Legacy Park Multipurpose Center:**
  - A representative from the City of Alachua who works with the Multipurpose Center was interviewed. The representative indicated that the purpose of Legacy Park is to serve the citizens of the City of Alachua and that the other events held there are secondary to that main objective. Legacy Park and the proposed event center have different purposes. Others have indicated that the two facilities could complement each other and allow for larger sporting events to be held in the area.



# PHONE INTERVIEW SUMMARIES (CONT.)

- **National Association of Intercollegiate Athletics (NAIA):**
  - The NAIA holds an annual national championship in indoor track and field. This event is currently held in Brookings, SD, and has been previously held in Pittsburgh, KS. The championships draw 100 men's and 100 women's teams from around the country, totaling around 1,110 participants and 3,000 spectators. The group is looking for a long-term home for its indoor track and field championships. The first priority is quality facilities including a 6-lane (8-lane straightaway) track that is preferably banked. There are other facility requirements including warm-up space, digital scoreboard, PA system, and locker rooms. The NAIA would look into a quality facility if it were built in Gainesville. The NAIA's Sun Conference is headquartered in Daytona Beach, FL and could also use the facility for its conference indoor track championships.
- **Sun Country Sports Center:**
  - Sun Country Sports Center is a multi-sport recreation facility that hosts gymnastics, rock climbing, swimming, and cheer classes and events. The facility is looking for a venue to host up to three gymnastics meets per year. They have previously used local high school gyms but have recently outgrown those venues and moved to the Legacy Multi-Purpose Center. Some amenities that the group is looking for include seating for over 300 spectators, adequate floor space, ability to truck equipment in and out, break out/hospitality rooms, and a separate space for awards presentation. The group would move to the proposed event center if it also met their budgetary constraints.



# PHONE INTERVIEW SUMMARIES (CONT.)



- **Sunshine State Games:**
  - A representative familiar with the Sunshine State Games and other basketball tournaments as a tournament director was interviewed. A facility that has four courts (ideally wood floors for high school and elite levels) would allow for some tournament activity. The courts at the Legacy Center could be used in conjunction with the new facility for larger tournaments. Gainesville has a natural draw for youth tournaments with the University of Florida nearby. The representative said that if the event center could host three to five tournaments of varying sizes each year.
- **Track & Field:**
  - An individual heavily involved with track and field in the Gainesville area was interviewed. The individual has previously been involved with Jimmy Carnes and other competitions. A facility with a banked track with seating for between 4,000 - 6,000 would rival other facilities and be a draw for top track talent in the state and region. Several university teams and elite runners currently travel far away to use other indoor track facilities. A hydraulic track would be ideal so that a flat track could be used outside of competitions.



# PHONE INTERVIEW SUMMARIES (CONT.)

- **US Amateur Basketball:**
  - The group has previously used Gainesville for national tournaments. The representative said that if a multi-court facility (more than four courts) were built in Gainesville, they would use it. They had success while using the courts at the Legacy Park last year. US Amateur Basketball worked with the Gainesville Sports Commission on this event. The group said that a new multi-court facility in the area could host some local basketball tournaments as well as some larger events if the number of courts and price to rent the courts was reasonable. US Amateur Basketball wants to hold events in Gainesville in the future.
- **USA Weightlifting:**
  - The governing body requires venues to have seating for 600-1,000 spectators, adequate ceiling height, and 20,000-30,000 sq. ft. of space to host its national events. The group has previously used the O'Connell Center for a national event. The group enjoyed Gainesville as a host site but many found it difficult to travel to from across the country.



## 5. SITE OPTIONS ANALYSIS



**Victus Advisors** was tasked with analyzing the market viability of three (3) potential locations for the event center, as defined by the County. Victus Advisors toured the potential sites, researched the ownership and other such factors for each site, and met with County and City of Gainesville staff, local developers, and other potential project stakeholders, which includes the following sites:



## Potential Sites

A

Koppers Site

B

MLK Site

C

North Waldo Road Sites  
(Tacachale Center Site or Alachua  
County Fairgrounds Site)

Source: Google Maps



# SITE SCORING CRITERIA



Each potential site in Alachua County was assessed and scored by Victus Advisors based upon the following general factors:

## 1. Site Factors:

- Do the site characteristics meet the requirements for the facility? (i.e. parcel size, site dimension, opportunities for additional development, etc.).
- Acquisition cost, demolition cost, and any on-site and off-site cost that might impact the development of the facility.
- Parking availability, access, and traffic impacts.

## 2. Economic & Hospitality Factors:

- Does the site have adjacent and/or nearby restaurants, retail, and hotels to provide a tourism-friendly environment and encourage repeat visitation?
- Are the adjacent/nearby property uses (neighborhoods, other commercial or public uses, etc.) compatible?
- Is the site conveniently located off an interstate highway exit for ease of regional travel access?



# SITE SCORING MATRIX



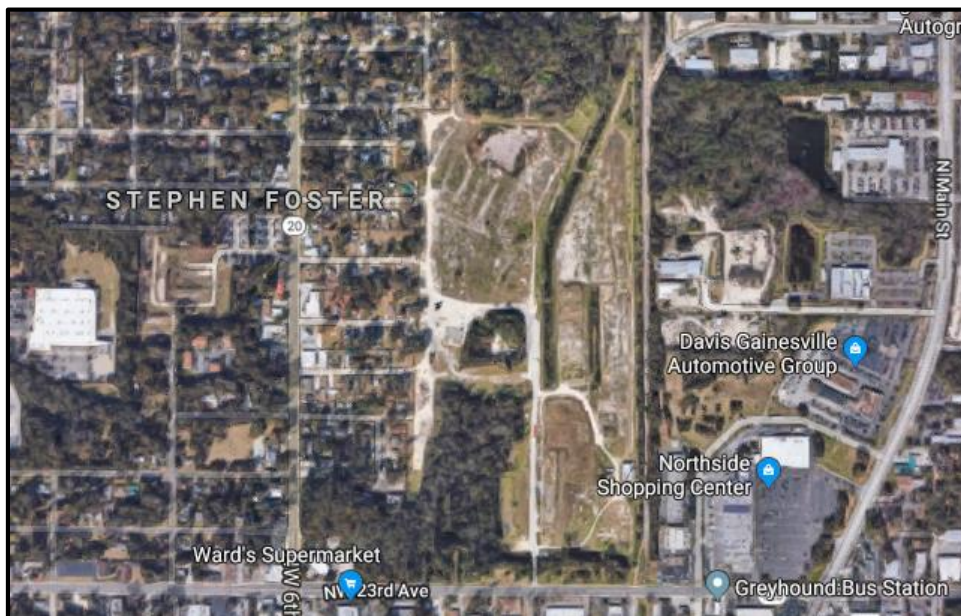
**Scoring Methodology:** Victus Advisors assigns a score of Above Average (3), Satisfactory (2), Below Average (1) for each criteria. High scores are assigned to the most suitable site and low scores assigned to the least suitable, based on each factor.

**Percentage Score:** A percentage score is calculated for each site, based upon total score awarded and total points available. Generally speaking, a percentage score of 50% represents a site that would not be recommended, 50-75% represent a potentially suitable site, and greater than 75% represent a highly recommended sites.

	Site A 200 NW 23rd Ave (Koppers Site)	Site B 1400 NE 8th Ave (MLK Site)	Site C 3100 NE 39th Ave & 1621 NE Waldo Rd (North Waldo Road Sites)
<b>Site Specifics</b>			
Site size and configuration/ability to accommodate building program	3	1	2
Ability to accommodate additional commercial development on-site	3	1	2
On-site parking opportunities	3	1	2
Environmental considerations, demolition/relocation, and other costs	1	2	2
<b>Economic &amp; Hospitality Factors</b>			
Presence of on-site/adjacent commercial development (hotel, retail, restaurants, etc.)	1	1	1
Presence of commercial development within 5-minute drive	2	2	1
Compatibility of adacent property uses	2	2	1
Convenient highway access	1	1	1
<b>TOTAL SCORE</b>	16	11	12
<b>TOTAL POINTS AVAILABLE</b>	24	24	24
<b>PERCENTAGE SCORE</b>	67%	46%	50%

# KOPPERS SITE

RANK: 1    SCORE: 67% ("POTENTIALLY SUITABLE")



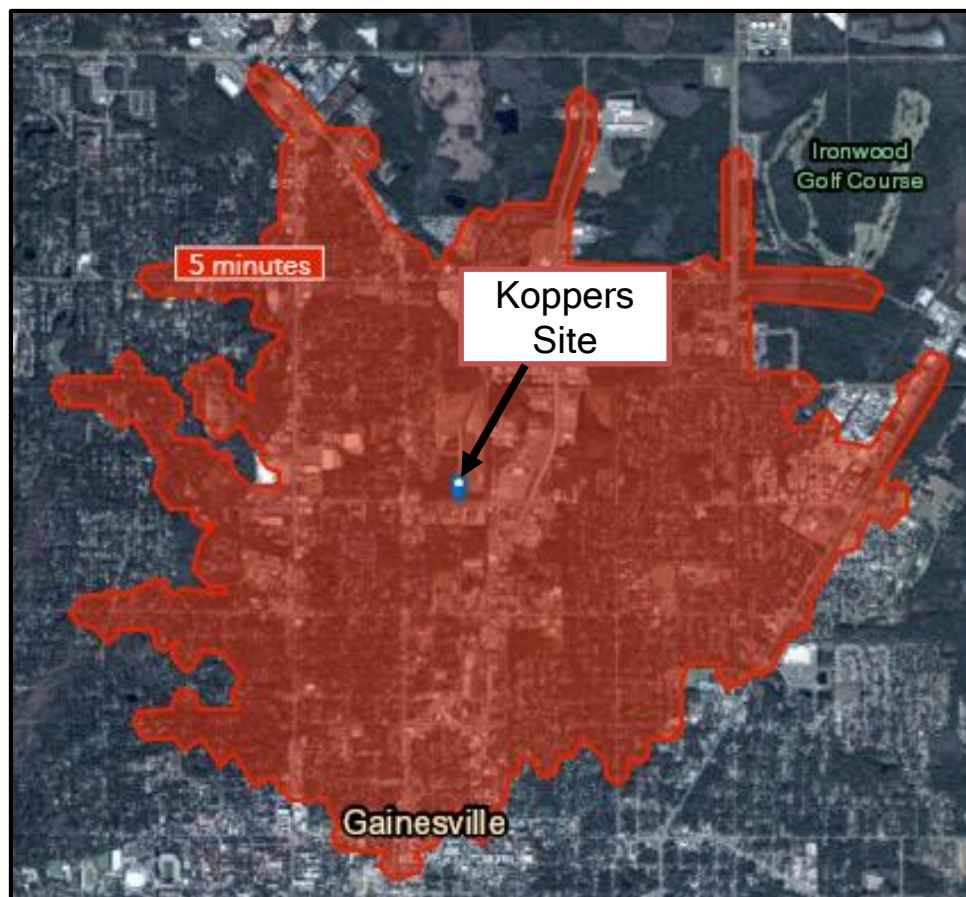
*Source: Google Maps*

**POSITIVES:** The site has considerable revitalization potential from an urban planning standpoint and has potential to be a “connector” between existing urban development projects, such as potential opportunities for developing a live-work-play corridor within the Gainesville urban core. Lastly, the site is much larger than the other sites analyzed, which allows for other development opportunities, creation of open space, etc. Neighbors have a positive attitude towards site development.

**NEGATIVES:** There is public concern about major contamination risks and the Environmental Protection Agency is starting remediations on the site. The site is also privately owned which could increase acquisition costs for the County.



# KOPPERS SITE (CONT.)



Source: Esri

**RETAIL:** Shopping within a 5-minute drive-time radius of the Koppers Site is highlighted by the Gainesville Plaza, Gainesville Shopping Center, and a Walmart Supercenter.

**DINING:** Dining within a 5-minute drive-time radius of the Koppers Site is highlighted by small local chains and quick service restaurants which are near major retail centers.

**LODGING:** There are six hotels within a 5-minute drive-time radius of the Koppers Site. All are either off NW 13<sup>th</sup> St or University Avenue.

# NORTH WALDO ROAD SITES

**RANK: 2    SCORE: 50% ("NOT RECOMMENDED")**

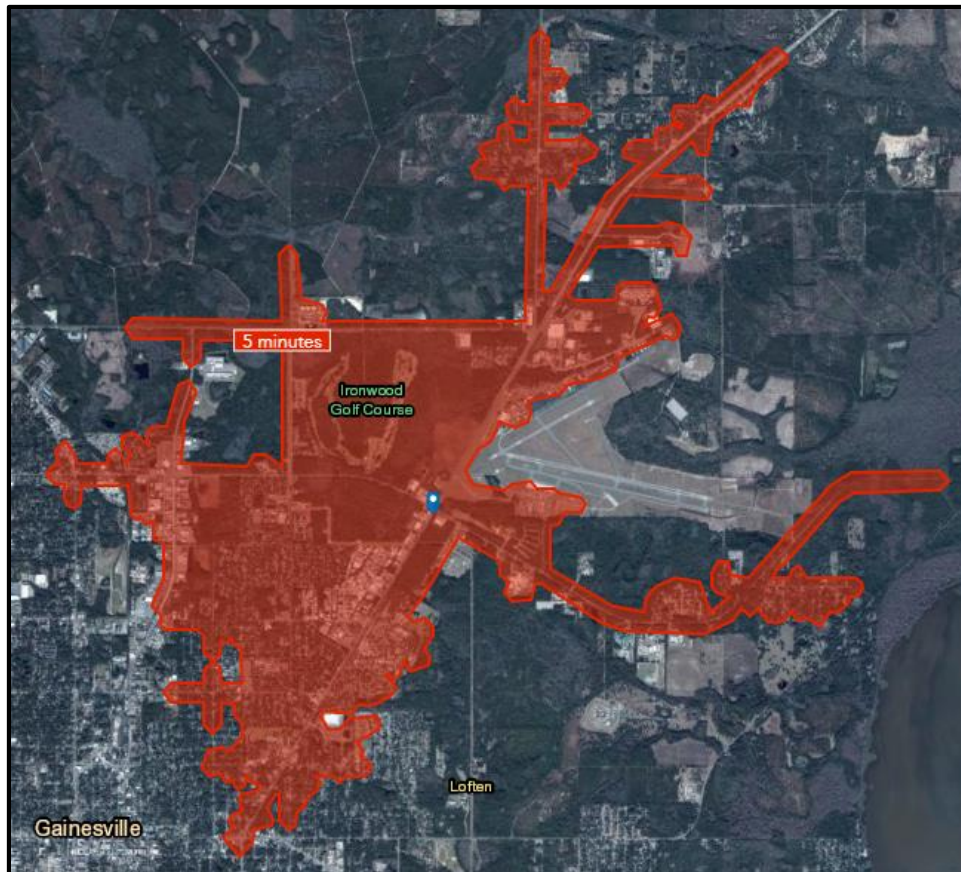


*Source: Google Maps*

**POSITIVES:** Both sites have plenty of land to build a facility and have ample parking.

**NEGATIVES:** Both sites are relatively far from the City core, and ancillary development on-site/adjacent to the event center would be a vital component for both overall sustainability and capturing economic impact. In addition, both sites are near the County jail, juvenile detention facilities, and a mental institution, which are not typically compatible uses with a tourism and hospitality driven event center. The proximity of a tourism driver venue to these types of facilities could negatively affect return visitation.

# NORTH WALDO ROAD SITES (CONT.)



Source: Esri

**RETAIL:** Shopping within a 5-minute drive-time radius of the North Waldo Road Sites is highlighted by the Gainesville Shopping Center, and a Walmart Supercenter.

**DINING:** Dining within a 5-minute drive-time radius of the North Waldo Road Sites is highlighted by a local BBQ chain southeast of the site and several local and national chains southwest of the site off University Avenue.

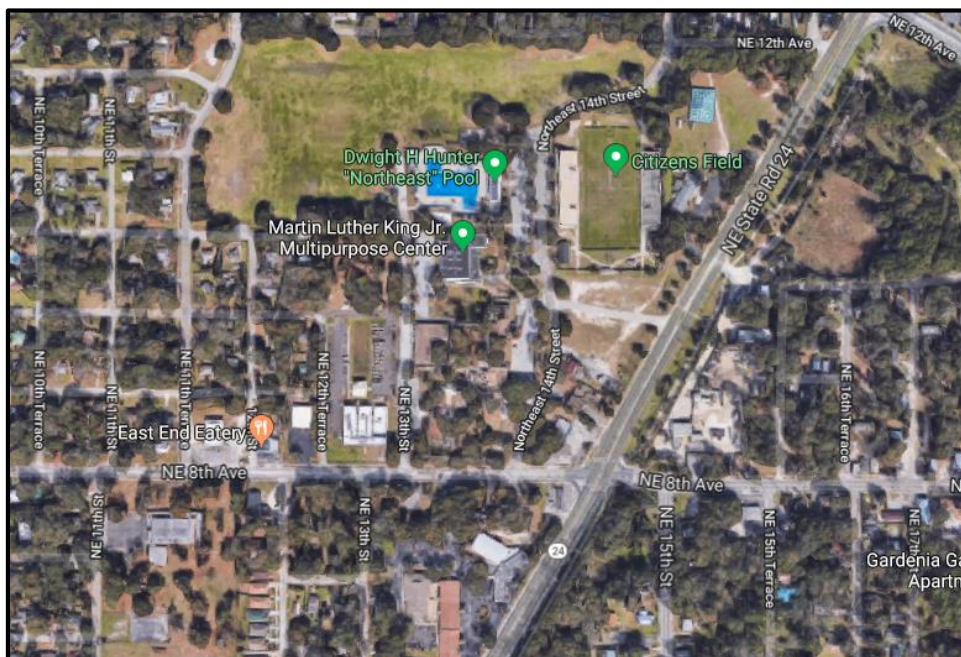
**LODGING:** There are only two hotels within a 5-minute drive-time radius of the North Waldo Road Sites. Both are off University Avenue.





# MLK SITE

**RANK: 3   SCORE: 46% ("NOT RECOMMENDED")**

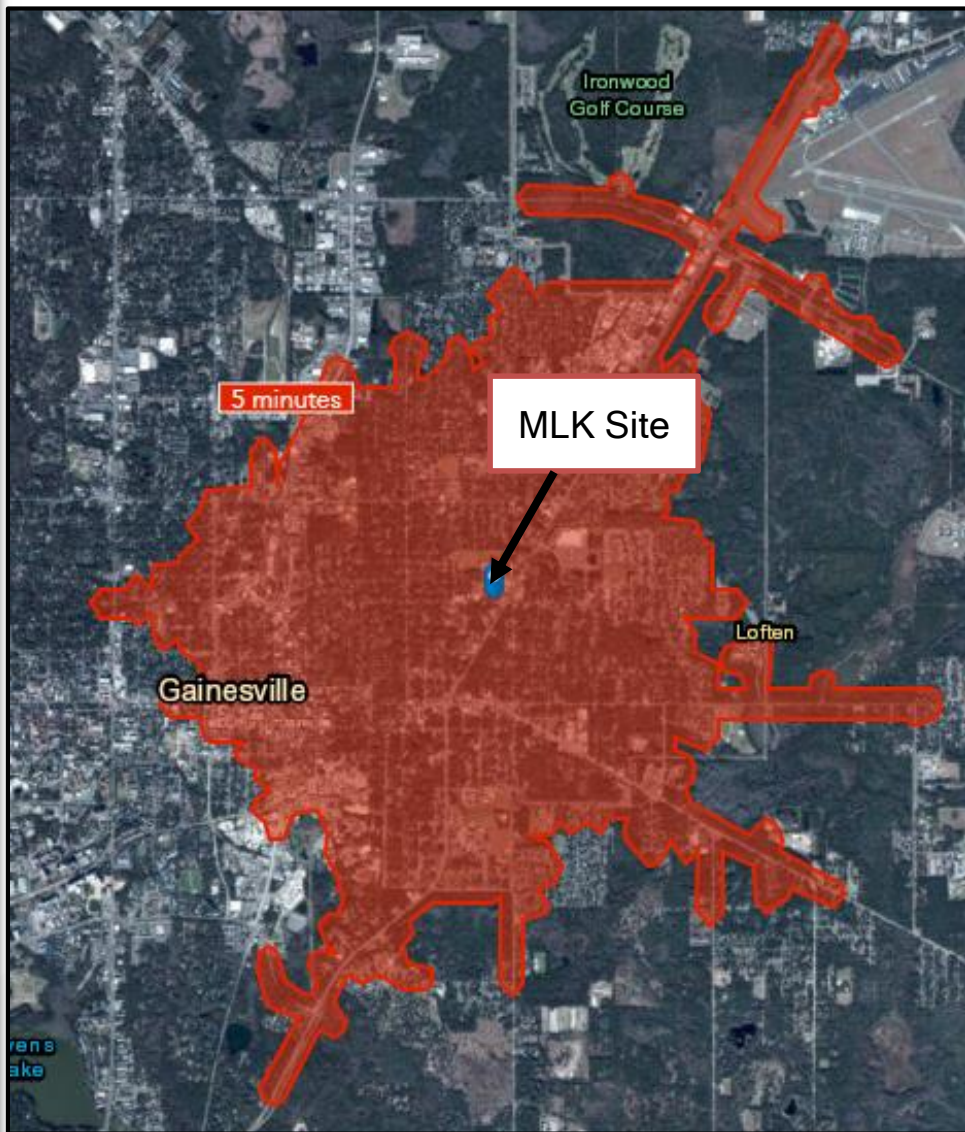


*Source: Google Maps*

**POSITIVES:** The site already has an existing facility in Citizens Field, which already has a significant amount of daily use with high school football games and other events. Additionally the site is already zoned properly for a multi-purpose event center. The City of Gainesville could have significant amount of money to contribute towards project from this site.

**NEGATIVES:** The site is already utilized for a multipurpose center, pool, and stadium, and the estimated developable area is only 10-15 acres. A potential event center would most likely be upwards of 100,000 sq. ft. which would be difficult to fit on the site, let alone the need for on-site parking. Additionally, there is concern that neighborhood residents could be negatively impacted due to parking challenges, increased traffic/noise, and land assembly.

# MLK SITE (CONT.)



**RETAIL:** Shopping within a 5-minute drive-time radius of the MLK Site is highlighted by the Gainesville Shopping Center, and a Walmart Supercenter.

**DINING:** Dining within a 5-minute drive-time radius of the MLK Site is highlighted by a local BBQ chain northeast of the site and several local and national chains southwest of the site off University Avenue.

**LODGING:** There are about 10 hotels within a 5-minute drive-time radius of the MLK Site. However all are either off University Avenue or further south.



# KEY SITE CONCLUSIONS

- **Koppers Site:** The Koppers Site is the only site of the three (3) analyzed that Victus Advisors scored as “potentially suitable”. Key positive aspects of the site include revitalization potential via connectivity between existing urban development projects, and the large size of the site, which can potentially accommodate the event center, parking, other on-site development, and open space.
- **North Waldo Road Sites & MLK Site:** The North Waldo Road and MLK Sites were scored as “not recommended” by Victus Advisors for event center development. For all of these sites along the Waldo Road Corridor, we have concerns regarding their distance from hospitality and tourism amenities, as well as their proximity to institutional facilities that are not compatible with tourism. In addition, it should be noted that these sites are not positioned conveniently to other current development projects, and the introduction of a stand-alone event center to those areas, without other compatible urban development projects nearby, would not be likely to spur economic development. Lastly, the MLK Site has limited space for development of the proposed event center without demolition of existing community uses such as a multipurpose center and a stadium, and furthermore the necessary parking for the event center would have to be constructed off-site.
- **Other Potential Sites:** Victus Advisors was only tasked with analyzing three sites/areas for this study, however it should be noted that many community stakeholders and leaders that we interviewed for this report felt that a new event center should be in a location with easy access to hotels, retail, and dining options. Several interviewees indicated that a site along the highly-trafficked I-75 corridor would be great due to ease of access to these types of amenities. A few interviewees specifically suggested Celebration Pointe as the ideal location for the potential event center, due to its proximity to hotel, retail, and dining, as well as I-75 access, all of which could help maximize tourism benefits.



## KEY SITE CONCLUSIONS (CONT.)

- **Sustainable Usage & Visitation:** The long-term sustainability of a new event center in Alachua County, as well as the ability to generate repeat out-of-town visitation (and thus sustainable economic impacts) is highly dependent on the location of the facility, in particular the proximity and ease of access to desirable tourist hospitality amenities such as hotels, restaurants, retail, and other attractions. In Victus Advisors' professional experience, a new event center developed within an area with limited hospitality infrastructure is likely to struggle in terms of repeat visitation and long-term sustainability, unless such hospitality infrastructure is built adjacent to the event center as part of the initial development project. It should be noted that although a new event center could have some potential for spurring additional development after it opens, such organic economic development is less likely if the event center is not combined with other nearby urban development projects. Furthermore, organic development can often take 5 to 10 years, if not longer, by which time a new event center will have established its customer base and reputation within the events industry.
- **Examples of Troubled Sports & Event Centers:** Victus Advisors is aware of several event center and sports arena projects within the past 10 years where these facilities were envisioned as potential catalysts for future development within under- or un-developed areas, however organic development did not occur as quickly or as significantly as hoped. Many of these sports and event facilities suffered from significant financial operating losses within their first three to five years of existence, with a few even filing for bankruptcy. Relevant examples include: LakePoint Sports - Cartersville, GA (bankruptcy); Santa Ana Star Center - Rio Rancho, NM (significant annual operating losses); Prescott Valley Event Center - Prescott, AZ (bankruptcy); and Sears Centre - Hoffman Estates, IL (operator default); among others.



## 6. PROGRAM DEMAND ANALYSIS & FACILITY RECOMMENDATIONS





# OVERVIEW



Our program demand analysis and facility recommendations are based primarily upon the following primary and secondary research conducted by Victus Advisors over the course of this study:

- Analysis of Alachua County's unique market characteristics.
- Review of comparative markets.
- Community feedback via interviews.
- Interviews conducted with event organizers and operators.

The primary goals of our study have been to estimate market demand for a new multi-purpose event center and determine if the potential success of the facility is dependent on the facility's location within the County.



# BUILDING PROGRAM RECOMMENDATIONS



**SIZE OF FACILITY** - Victus Advisors reviewed Alachua County's preliminary facility concepts for an approximately 92,000 square foot multi-purpose event center. Based upon Victus Advisors' research, and our team's industry experience with similar facilities, it is likely that the proposed facility would have to be somewhat larger in order to accommodate the types of programming Alachua County would like to attract. Enhanced restroom and food/beverage facilities would be necessary to support larger events. Additionally, as a multi-purpose venue, significant storage space would be required for storing special purpose flooring and mats for various event types. Finally, sufficient space would need to be provided for the indoor track to be functional while the retractable seats were opened, as many track and field events require seating for at least 3,000 spectators.

**VENUE PROGRAMMING** - The venue should be multi-purpose and maximize daily use (when not in 3,000-seat arena event configuration) by featuring retractable seating in order to accommodate a wide variety of potential uses. The recommended programming should include: indoor track and field; high school and youth/amateur basketball, volleyball, gymnastics, cheer, and wrestling; flat floor and consumer shows (i.e. conferences, home & garden shows, and other events that utilize a non-carpeted/concrete floor). Victus Advisors also believes that a significant number of regional and national youth/amateur sports tournaments could be held at a new event center in Alachua County, which would help maximize the potential economic impacts by drawing families for overnight visits. These types of events typically require space for at least eight (8) basketball or volleyball courts.

**FLAT FLOOR SPACE** - A typical event center floor (without retractable seating) has approximately 17,000 sq. ft. of concrete floor space, however the use of retractable seating systems could expand the available floor space to at least 30,000 sq. ft. or more. As an example, it is estimated that 30,000 sq. ft. of event floor space could accommodate as many as 150 ten-by-ten foot booths for trade show-type events. 100



# BUILDING PROGRAM RECOMMENDATIONS (CONT.)



**SEATING CAPACITY** - The preferred maximum seating capacity for the new facility should be a minimum of 3,000 seats in indoor track configuration. Additionally the seats should be retractable to maximize floor space utilization for events that don't require bleacher seating. The minimum seating recommendation would ensure that the multi-purpose event center complies with NCAA and NAIA requirements for hosting indoor track and field events.

**PARKING** - An event center typically requires at least one available parking spot within walking distance for every three attendees. For example, it is estimated that 3,000 event attendees could require nearly 1,000 total parking spots within a 10-minute walk. In addition, up to 150 of on-site parking spots should be provided for VIP customers, customers with disabilities, and staff. In terms of best practices for economic development, there should be a minimum amount of parking attached directly to the facility (such as via connected parking garage). Dispersing parking throughout an adjacent walkable area with restaurant/retail options will encourage attendees to interact with local businesses and drive economic impact.

**OTHER EVENT CENTER COMPONENTS** - At least one (1) concessions point of sale for every 250 seats, at least one (1) toilet stall per 50 seats, and one (1) urinal per 100 seats. At least two (2) full-sized locker rooms for sports use, and at least four (4) additional dressing rooms for use by officials, performers, etc. Other features could include video scoreboard, digital/LED signage, A/V and lighting equipment, storage and marshalling areas, rigging grid and stage capabilities, box office, office space for event center personnel, etc.





# BUILDING PROGRAM RECOMMENDATIONS (CONT.)



**INDOOR TRACK** - With a banked track and the use of portable sports flooring, multi-use (non-track) events could also be programmed year-round to provide additional space for events utilizing the primary sports center facility (e.g. basketball, volleyball, etc.).

A flat track (non-banking) would significantly limit the ability of the venue to host larger regional meets and college track events. A flat track would primarily be a local use amenity.

The typical season for smaller indoor track and field meets would be from December to February, culminating in larger regional and national events, including NCAA and NAIA championships in late February and early March. Peak track and field usage for the facility in Alachua County, with a focus on hosting larger regional/national championships that drive overnight visitation, would likely be in February/March.

In regards to potential overlapping of track and field events with volleyball and basketball tournaments, Victus Advisors found that the majority of boys and girls basketball/volleyball tournaments are not typically held in February/March. Victus Advisors also found the same typical schedule for volleyball tournaments.



# MULTI-PURPOSE EVENT CENTER

## Facility Recommendation:

- Alachua County community should consider the development of a multi-purpose event center that could be a tourism driver for amateur and youth sports events in addition to meetings, conferences, and expos. Based upon the results of our market and facility analysis, Victus Advisors recommends that a new multi-purpose event center in Alachua County should have:
  - ☐ A minimum of eight (8) basketball courts, which should be convertible to eight (8) or more volleyball courts to be able to attract regional and major tournaments.
  - ☐ The same floor space used by basketball, volleyball, and other sports should be adaptable for conference, expos, and meetings.
  - ☐ A removal banked track that could accommodate competitive indoor track events at the youth and collegiate level.
  - ☐ Support areas and amenities, including lobby, concessions, team rooms, offices, mechanical/electrical rooms, storage, circulation, etc.
  - ☐ Bleacher seating for at least 3,000 people to fulfill minimum NCAA/NAIA requirement.
  - ☐ Modern amenities such as wireless internet capabilities and flexible space configurations.

## Rationale:

- Victus found that large multi-court facilities and indoor track facilities are significantly lacking in Alachua County. A multi-purpose event center would capture lost and future events that are not able to use the O'Connell Center, as well as larger sports and trade/expo events that current venues in the County can't accommodate.

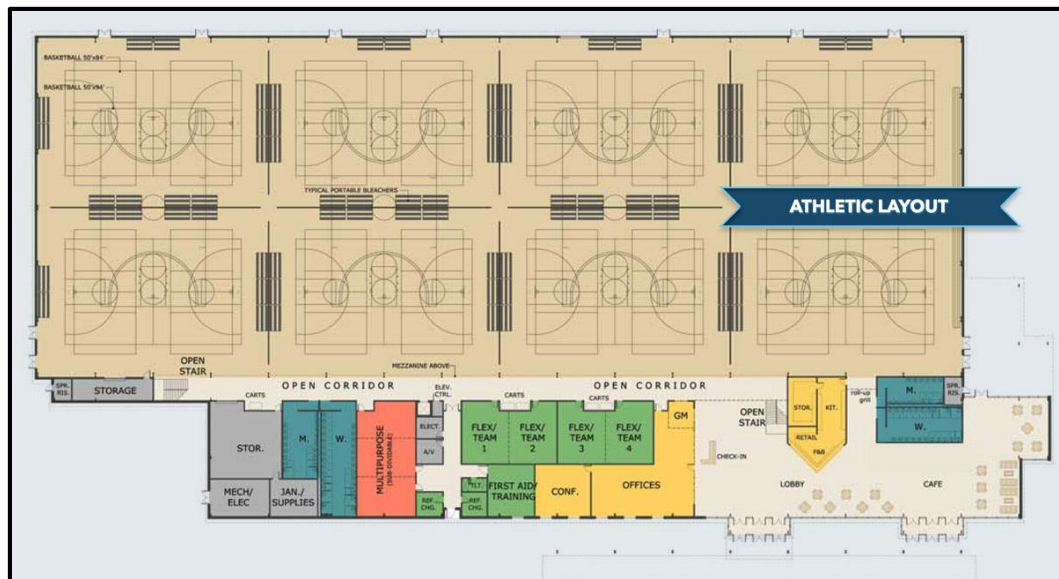
# POTENTIAL COMPARABLE FACILITY MODEL

The Myrtle Beach Sports Center is approximately 100,000 square feet in total. It was built in 2015 for approximately \$12.4 million in building costs (prior to any site/acquisition costs).

As a sports venue, it was designed so that eight (8) basketball courts could also be utilized as 16 volleyball courts (i.e. two volleyball courts per basketball court).

The facility can also be converted to approximately 70,000 sq. ft. of column free space for conventions, expos, and trade shows.

For events requiring a larger spectator capacity, portable bleacher systems can be brought in for temporary use. However, it should be noted that the facility does not have retractable seating capacity or an indoor track, two components that could add significant cost in Alachua County.





# CONTACT INFORMATION



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**DRAFT**

Subject to Change

MARKET DEMAND STUDY & SITE OPTIONS ANALYSIS  
FOR A NEW MULTI-PURPOSE EVENT CENTER IN  
ALACHUA COUNTY, FLORIDA

Draft v1 - November 16, 2018







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## EXECUTIVE SUMMARY



# INTRODUCTION & MARKET ANALYSIS



**Project Background** - Victus Advisors was engaged by Alachua County (the “County”) in August 2018 to provide the County with a market demand study and site options analysis for a new multi-purpose event center. The County envisions that this event center will be an approximately 92,000 square foot multi-purpose, flexible, and functional space that will accommodate athletic events, banquets, graduations, motor vehicle shows, and various consumer shows, performances, and meetings. The recent renovations to the University of Florida’s O’Connell Center saw the loss of the region’s only indoor track and the loss of related events. The event center will include an indoor track that will draw events and visitors from throughout the southeastern United States and beyond.

**Project Goals** - Our primary project goals for this study include:

- Estimate market demand for a new multi-purpose event center.
- Based on demand, determine what programs, features, and amenities could be supported by the market.
- Determine if the potential success of the facility is dependent on the facility’s location within the County.

**Demographic & Socioeconomic Analysis** - Alachua County is part of the Gainesville, FL Metropolitan Statistical Area (MSA), as designated by the U.S. Office of Management & Budget. The MSA is comprised of Alachua and Gilchrist Counties, and it has an estimated population of 283,059, with 265,286 coming from Alachua County.

Alachua County’s population is projected to grow at a slightly higher rate than the U.S. as a whole. In terms of median age, Alachua County has a lower median age than the U.S. average. A lower median age tends to represent a larger presence of working-age populations and young families. Furthermore a lower median age indicates positive potential for sports and event activity.

When adjusted for cost of living, the median household income in Alachua County is below the U.S. average. Higher household income levels can often indicate an ability for a household to spend disposable income on sports and other entertainment events.

There are five large markets (with a population of more than 500,000 people each) within a 2.5-hour drive of Alachua County. An additional six large markets are within a 5-hour drive (overnight trip), with a total population within a 5-hour drive of Gainesville of nearly 15 million people. It is noted that other small cities (such as Tallahassee) are also located within these drive-time windows.





# COMPETITIVE & COMPARATIVE MARKET & FACILITY ANALYSIS

**Overview** - Based upon our community feedback process, which is described in detail later in this report, the Alachua County community identified sports, meeting, and event facilities in the following markets as potentially competitive or comparative with a new multi-use event center in Gainesville. Victus Advisors compared the Gainesville Metropolitan Statistical Area's demographic and socioeconomic characteristics to the competitive set of MSAs in Florida and the southeast (listed in alphabetical order below):

- Birmingham, Alabama
- Daytona Beach, FL
- Jacksonville, FL
- Lakeland, FL
- Myrtle Beach, SC
- Orlando, FL
- Tallahassee, FL
- Tampa, FL
- Virginia Beach, VA

**Population** - The Gainesville MSA's population of 283,059 represents the least populated out of the 10 markets selected for comparative analysis. Given the smaller market size, it is important that seating/attendance capacities in a new event center be appropriately sized for the population base.

**Population Growth** - The projected population growth rate of the Gainesville MSA ranks seventh among the 10 comparative markets.

*DRAFT - Subject to Change*

**Median Age** - The Gainesville MSA's median age of 32.3 is lowest among comparative markets. This may be due to the student base at the University of Florida.

**Youth** - Nearly 54% of households in the Gainesville market have children, which ranks last amongst comparative markets. Again this may be due in part to the large student population at the University of Florida.

**Household Income** - The Gainesville market ranks last among comparative markets in terms of cost-of-living-adjusted median household income, which can be a potential indicator of household budgets available for spending on sports, entertainment, recreation, and leisure. Therefore, it is important that a new event center be developed with a flexible layout and multiple uses, so as to tap into a wider variety of event demand, users, and attendees.

**Corporate Base** - Among comparative markets, Gainesville ranks last in terms of business inventory, which can be an indicator for potential corporate sponsorship and naming rights support for new event facilities.



# COMPETITIVE & COMPARATIVE MARKET & FACILITY ANALYSIS (CONT.)



**Comparative Facilities** - Within each comparable market, Victus analyzed facilities that could potentially be comparable or competitive to a new event center in Alachua County. We've classified them as Sports Facilities, Conference & Meeting Facilities, and Event Centers:

## Sports Facilities

- The Big House - Tavares, FL
- Birmingham Crossplex - Birmingham, AL
- Boo Williams Sportsplex - Hampton, VA
- Legacy Park Multipurpose Center - Alachua, FL
- Myrtle Beach Sports Center - Myrtle Beach, SC
- Pasco Sports Complex - Pasco County, FL
- Virginia Beach Sports Center - Virginia Beach, VA

## Conference & Meeting Facilities

- Best Western Grand Gateway - Gainesville, FL
- Hilton University of Florida - Gainesville, FL
- Ocean Center - Daytona Beach, FL
- Turnbull Florida State Conference Center - Tallahassee, FL

## Event Centers

- Veterans Memorial Arena - Jacksonville, FL
- O'Connell Center - Gainesville, FL
- RP Funding Center - Lakeland, FL
- Tucker Civic Center - Tallahassee, FL

## **Key Takeaways -**

- The Sports Tourism industry is large and growing, and a tournament-caliber sports facility could have a significant impact on Alachua County if a venue is large enough (ideally with at least 8 indoor courts and indoor track capabilities) and located within close proximity of highways, hotels, and other hospitality amenities.
- Expos and Trade Shows are typically conducted in column-free, concrete floor space, such as a convention hall or arena/event center with retractable seating. Victus Advisors believes that a multi-purpose event center in Alachua County could utilize retractable seating to create a larger, concrete flat-floor space than currently exists in the County to appeal to small/medium-sized conferences, trade shows, and expos.
- Due to the size of the Alachua County market and the nature of the concert/entertainment event industry, it is expected that a new multi-purpose event center in Alachua County would not consistently attract touring Concert and Family Show activity. Any concert activity held in the facility is likely to be smaller, local concert activity.
- In order to accommodate indoor sports courts, trade shows/expos, and indoor track with spectator seating for regional meets, it is likely that a new multi-use event center in Alachua County would require a larger Square Footage than the County's preliminary facility concepts (of approximately 92,000 sq. ft.).



# INTERVIEW SUMMARIES



**Overview** - In September 2018, Alachua County identified participants and scheduled a series of one-on-one interviews for Victus Advisors. The goals of these interviews were to gather feedback from key stakeholders and community leaders regarding the market potential for a new event center in Gainesville. Also in October 2018, Victus Advisors held telephone interviews with operators, promoters and influencers of sports, entertainment, and trade show/conference events both regionally and nationwide.

**Interview Topics** - One-on-one and phone interview topics included:

- Perceptions of Alachua County
- Alachua County's current event venue offerings
- Possible comparable and competitive venues and markets
- Ideal amenities and potential events that could be held at the new event center

## **Interview Key Takeaways -**

- Almost every interviewee mentioned the O'Connell Center as the primary event venue in Alachua County. Since the renovation of the O'Connell Center, several events have been displaced from the venue including indoor track and field events, Cirque du Soleil, and some exhibition shows.
- Almost all interviewees were in favor of a new event center of some kind in the County. Many of those interviewed said that there is not much opposition to its development.

- Many expressed that Gainesville lacks a space for local meetings, conventions, and conferences. One interviewee mentioned that some companies must go to other markets (Orlando and Jacksonville) for employee events and conferences.
- Some people interviewed said that a concert venue is needed in the County and that they support a facility that can host concerts. Whereas others indicated that Gainesville is a weak concert market and do not see a new facility drawing concerts.
- Many people interviewed think that the new event center should be in a location with easy access to hotels, retail, and dining options. Several interviewees indicated that anywhere along the highly-trafficked I-75 corridor would be great due to ease of access to these same amenities.
- A shared sentiment among many people interviewed is that there is demand to build a new event center on the west side of the County due to existing economic development there, and that the east side of the County does not offer as many amenities and infrastructure support for such a facility. A few interviewees specifically suggested Celebration Pointe as a good location for the potential facility, due to its proximity to hotel, retail, and dining, as well as I-75 access.



# SITE OPTIONS ANALYSIS

**Overview** - Victus Advisors was tasked with analyzing the market viability of three (3) potential locations for the event center, as defined by the County. Victus Advisors toured the potential sites, researched the ownership and other such factors for each site, and met with County and City of Gainesville staff, local developers, and other potential project stakeholders, which includes the following sites:

- A. Koppers Site
- B. MLK Site
- C. North Waldo Road Sites

**Site Scoring Criteria** - Each potential site in Alachua County was assessed and scored by Victus Advisors based upon the following general categories:

- 1. Site Factors
- 2. Economic & Hospitality Factors

## Site Scoring Matrix -

- Victus Advisors assigns a score of Above Average (3), Satisfactory (2), Below Average (1) for each criteria. High scores are assigned to the most suitable site and low scores assigned to the least suitable, based on each factor.
- A percentage score is calculated for each site, based upon total score awarded and total points available. Generally speaking, a percentage score of 50% or less represents a site that would not be recommended, 50-75% represent a potentially suitable site, and over 75% represent a highly recommended site.

	Site A 200 NW 23rd Ave (Koppers Site)	Site B 1400 NE 8th Ave (MLK Site)	Site C 3100 NE 39th Ave & 1621 NE Waldo Rd (North Waldo Road Sites)
Site Specifics			
Site size and configuration/ability to accommodate building program	3	1	2
Ability to accommodate additional commercial development on-site	3	1	2
On-site parking opportunities	3	1	2
Environmental considerations, demolition/relocation, and other costs	1	2	2
Economic & Hospitality Factors			
Presence of on-site/adjacent commercial development (hotel, retail, restaurants, etc.)	1	1	1
Presence of commercial development within 5-minute drive	2	2	1
Compatibility of adjacent property uses	2	2	1
Convenient highway access	1	1	1
TOTAL SCORE	16	11	12
TOTAL POINTS AVAILABLE	24	24	24
PERCENTAGE SCORE	67%	46%	50%



# PROGRAM DEMAND ANALYSIS & FACILITY RECOMMENDATIONS

**Overview** - Our program demand analysis and facility recommendations are based primarily upon the following primary and secondary research conducted by Victus Advisors over the course of this study:

- Analysis of Alachua County's unique market characteristics.
- Review of comparative markets.
- Community feedback via interviews.
- Interviews conducted with event organizers and operators.

The primary goals of our study have been to estimate market demand for a new multi-purpose event center and determine if the potential success of the facility is dependent on the facility's location within the County.

## **Building Program Recommendations -**

- **Size of Facility:** Victus Advisors reviewed Alachua County's preliminary facility concepts for an approximately 92,000 square foot multi-purpose event center. Based upon Victus Advisors' research, and our team's industry experience with similar facilities, it is likely that the proposed facility would have to be somewhat larger in order to accommodate the types of programming Alachua County would like to attract.
- **Venue Programming:** The venue should be multi-purpose and maximize daily use. The recommended programming should include: indoor track and field; high school and youth/amateur basketball, volleyball, gymnastics, cheer, and wrestling; flat floor and consumer shows.

- **Flat Floor Space:** A typical event center floor (without retractable seating) has approximately 17,000 sq. ft. of concrete floor space, however the use of retractable seating systems could expand the available floor space to 30,000 sq. ft. or more. It is estimated that 30,000 sq. ft. of event floor space could accommodate as many as 150 ten-by-ten foot booths for trade show-type events.

Based upon the results of our market and facility analysis, Victus Advisors recommends that a new multi-purpose event center in Alachua County should have:

- Up to eight (8) basketball courts, which should be convertible to eight (8) or more volleyball courts.
- The same flat floor space used by basketball, volleyball, and other sports (with portable sports flooring) should be adaptable for conference, expos, and meetings (on concrete floors).
- A removal banked track that could accommodate competitive indoor track events at the youth and collegiate level.
- Support areas and amenities, including lobby, concessions, team rooms, offices, mechanical/electrical rooms, storage, circulation, etc.
- Retractable seating capacity for at least 3,000 people to fulfill minimum NCAA/NAIA requirement.
- Modern amenities such as wireless internet capabilities and flexible space configurations.
- At least one available parking spot within walking distance for every three attendees.



## 1. INTRODUCTION



# PROJECT BACKGROUND



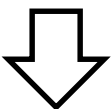
**Victus Advisors** was engaged by **Alachua County** (the “County”) in August 2018 to provide the County with a market demand study and site options analysis for a new multi-purpose event center. The County envisions that this event center will be an approximately 92,000 square foot multi-purpose, flexible, and functional space that will accommodate athletic events, banquets, graduations, motor vehicle shows, and various consumer shows, performances, and meetings. The recent renovations to the University of Florida’s O’Connell Center saw the loss of the region’s only indoor track and the loss of related events. The event center will include an indoor track that will draw events and visitors from throughout the southeastern United States and beyond.

Victus Advisors’ primary project goals for this study include:

- Estimate market demand for a new multi-purpose event center.
- Based on demand, determine what programs, features, and amenities could be supported by the market.
- Determine if the potential success of the facility is dependent on the facility’s location within the County.

## PHASES:

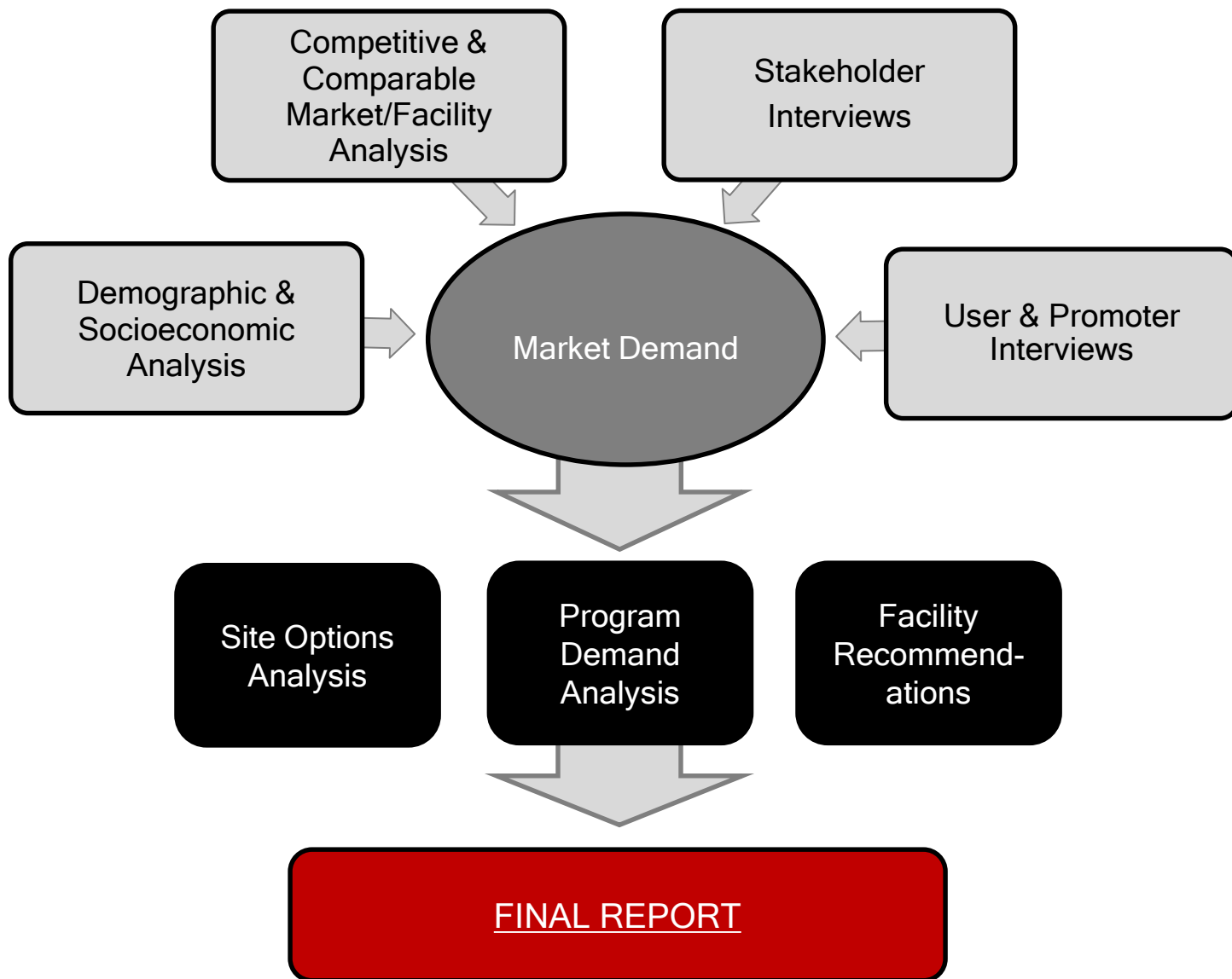
### 1. MARKET DEMAND ANALYSIS



### 2. SITE OPTIONS & PROGRAM DEMAND FOR A PROPOSED VENUE



### 3. FINAL DELIVERABLES



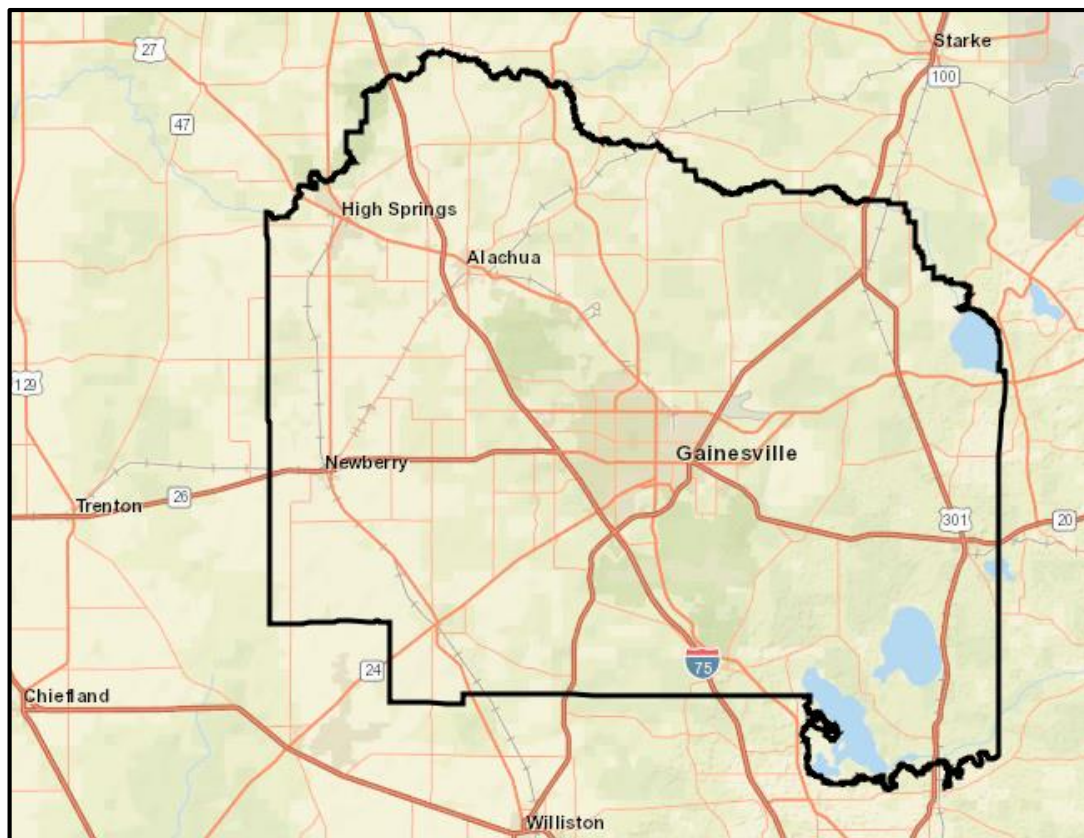




## 2. DEMOGRAPHIC & SOCIOECONOMIC ANALYSIS



# ALACHUA COUNTY



Source: Esri

Alachua County is part of the Gainesville, FL Metropolitan Statistical Area (MSA), as designated by the U.S. Office of Management & Budget. The MSA is comprised of Alachua and Gilchrist Counties, and it has an estimated population of 283,059, with 265,286 coming from Alachua County. Alachua County is shown in the map on the left.



# POPULATION DATA

	Alachua County	United States
Population	265,286	330,088,686
Population Under 18	44,026	73,315,750
Percentage of Population Under 18	16.6%	22.2%
Population Growth:		
Annual Pop. Growth (2000 to 2018)	1.1%	0.9%
Annual Pop. Growth (5-year Projection)	1.1%	0.8%
Projected Population (2023)	279,563	343,954,683
Median Age	31.8	38.3

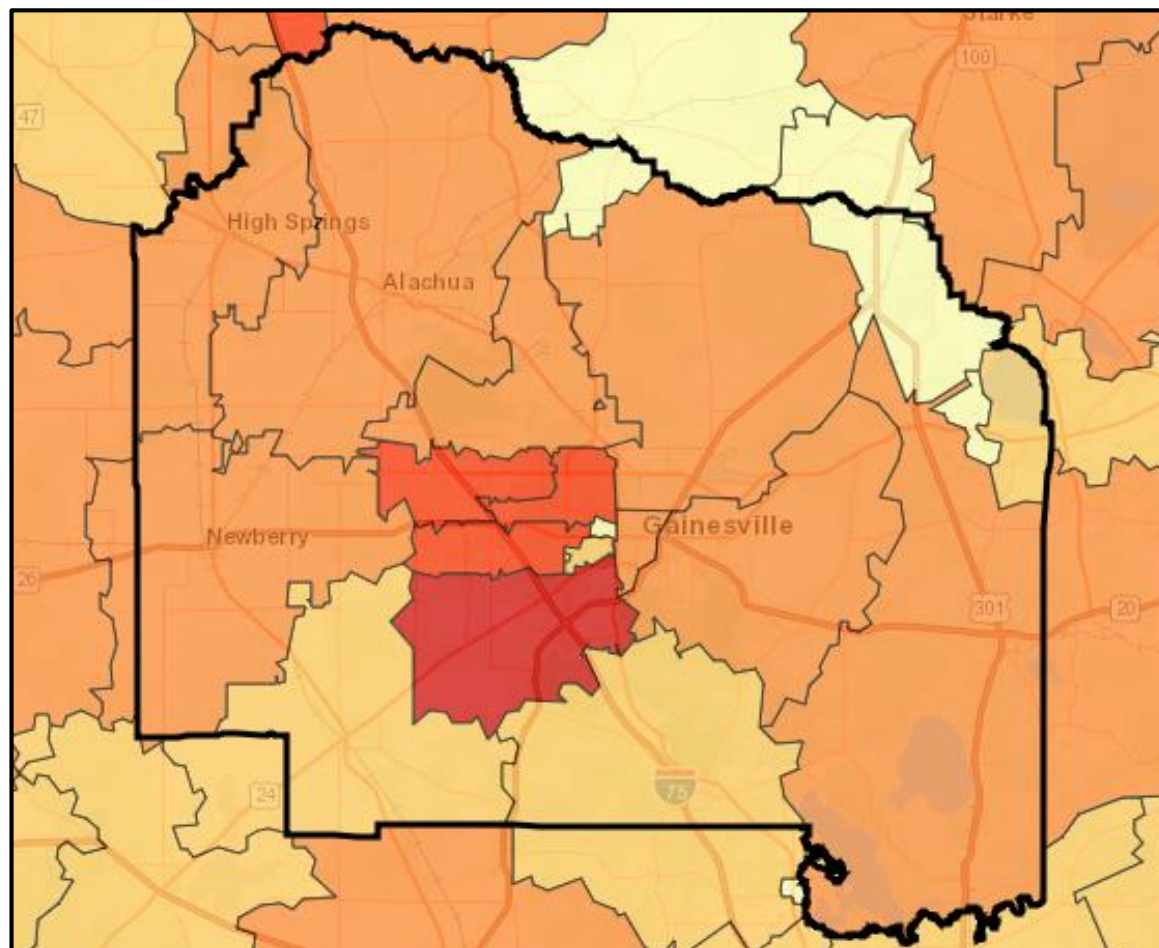
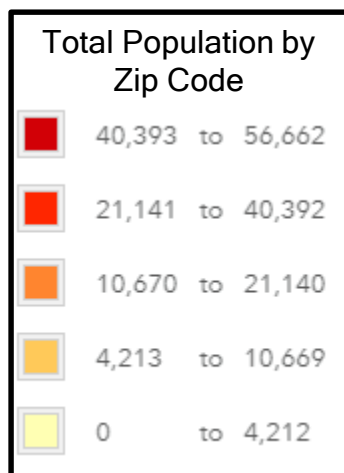
Source: Esri

Alachua County's population is projected to grow at a slightly higher rate than the U.S. as a whole.

In terms of median age, Alachua County has a lower median age than the U.S. average. A lower median age tends to represent a larger presence of working-age populations and young families.

Furthermore a lower median age indicates positive potential for sports and event activity.

# POPULATION DISTRIBUTION

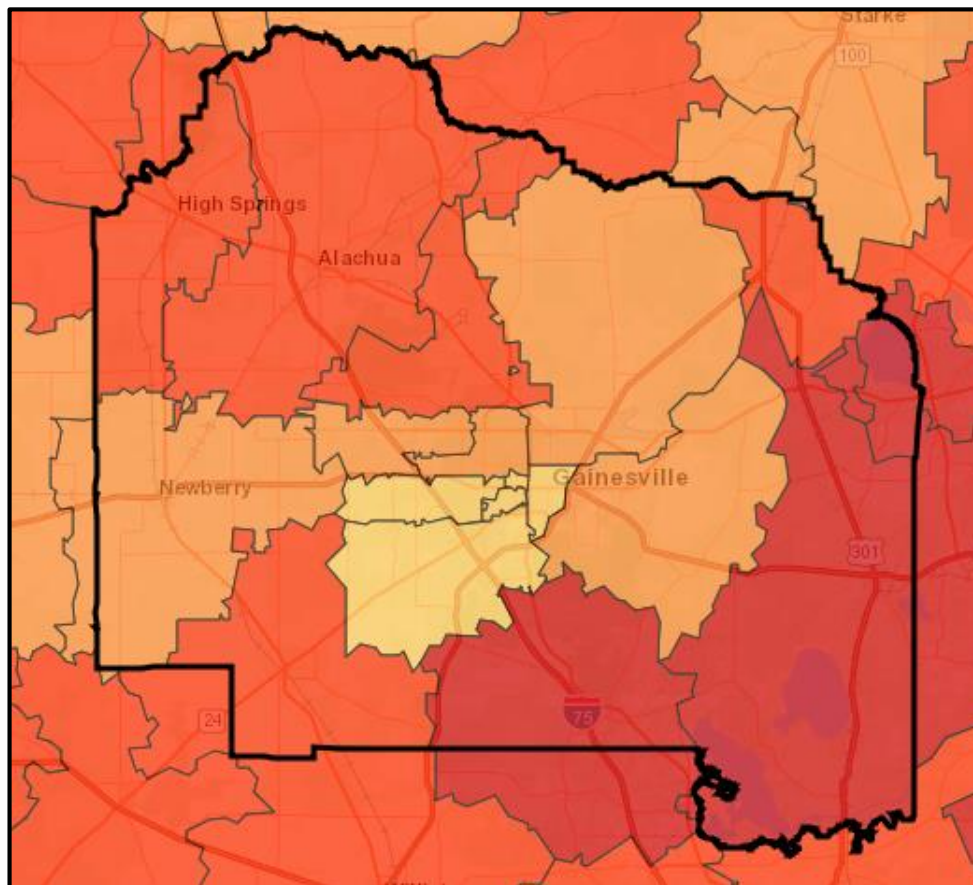


Source: Esri

Population density in Alachua County is highest to the West of the City of Gainesville.

# AGE DISTRIBUTION

## Median Age Distribution by Zip Code



Source: Esri

Younger age groups tend to be clustered around the University of Florida and southwest of Gainesville.



# HOUSEHOLD DATA

	Alachua County	United States
Total Households	251,386	124,110,001
Households With Children Under 18	164,551	81,631,156
Percentage of Households With Children	65.5%	65.8%

Source: Esri

	Alachua County	United States
Median Household Income	\$45,357	\$58,100
Adjusted Median Household Income (1)	\$50,906	\$58,100

Sources: Esri, city-data.com

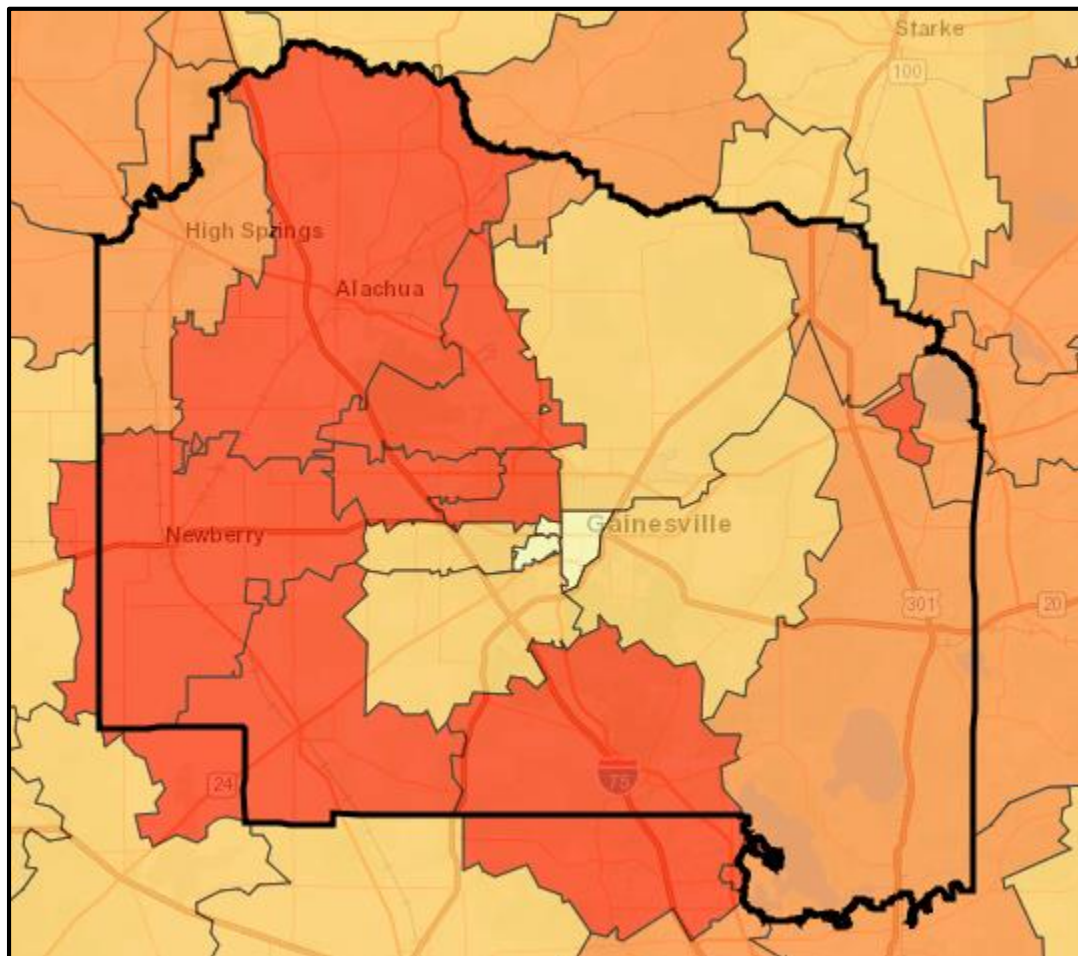
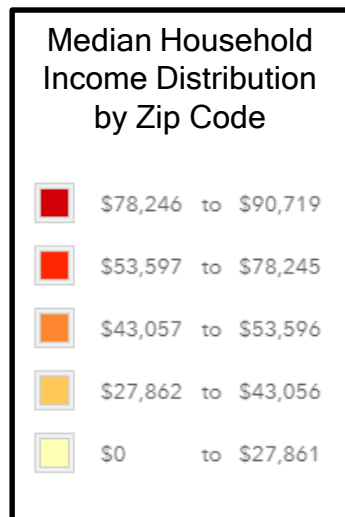
Note: (1) Adjusted for cost of living according to city-data.com

Alachua County has a similar percentage of households with children compared to the U.S. average. A high percentage of households with children is a positive indicator for youth sports and entertainment demand in the region.

When adjusted for cost of living, the median household income in Alachua County is below the U.S. average. Higher household income levels can often indicate an ability for a household to spend disposable income on sports and other entertainment events.



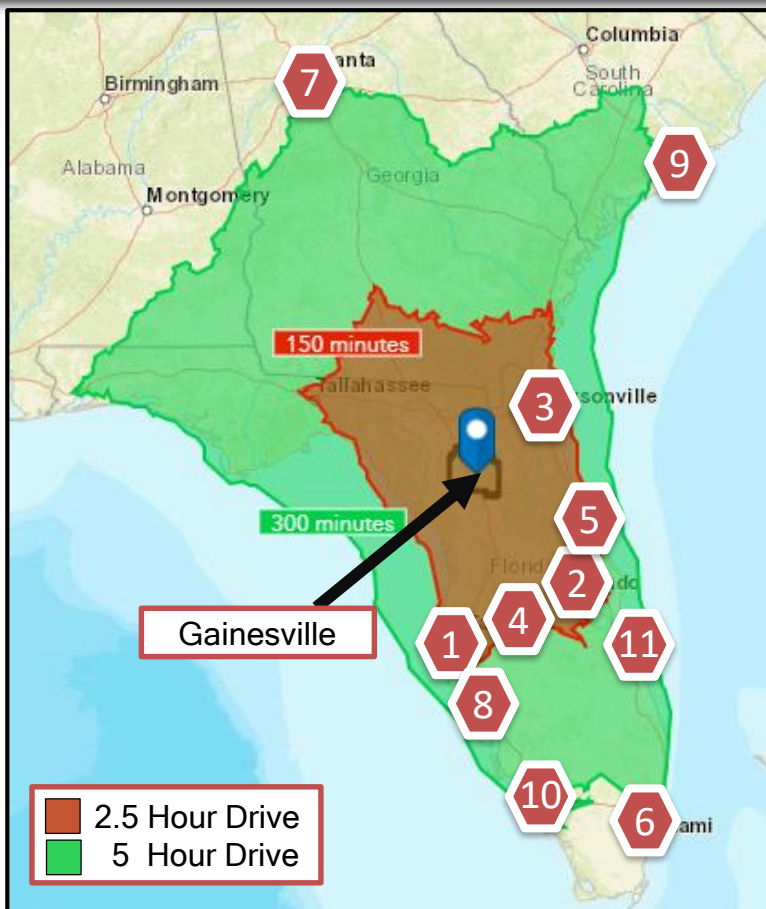
# INCOME DISTRIBUTION



Source: Esri

Median Household Income levels tend to be highest in the western half of the County, with lower income levels near downtown Gainesville.

# TOURISM DRIVE TIME ZONES



Source: Esri

## \* METROPOLITAN STATISTICAL AREA (MSA)

MSA's are defined by U.S. Office of Management & Budget as adjacent counties with high degree of social/economic integration with urban core of 50,000 people or more.

There are five large markets (with a population of more than 500,000 people each) within a 2.5-hour drive of Alachua County. An additional six large markets are within a 5-hour drive (overnight trip), with a total population within a 5-hour drive of Gainesville of nearly 15 million people. It is noted that other small cities (such as Tallahassee) are also located within these drive-time windows.

### MSA's\* with 500,000+ Population Within a 2.5-hour Drive

- 1 Tampa-St. Petersburg MSA  
3,098,274
- 2 Orlando-Kissimmee MSA  
2,500,950
- 3 Jacksonville MSA  
1,523,615
- 4 Lakeland MSA  
667,696
- 5 Daytona Beach MSA  
648,188

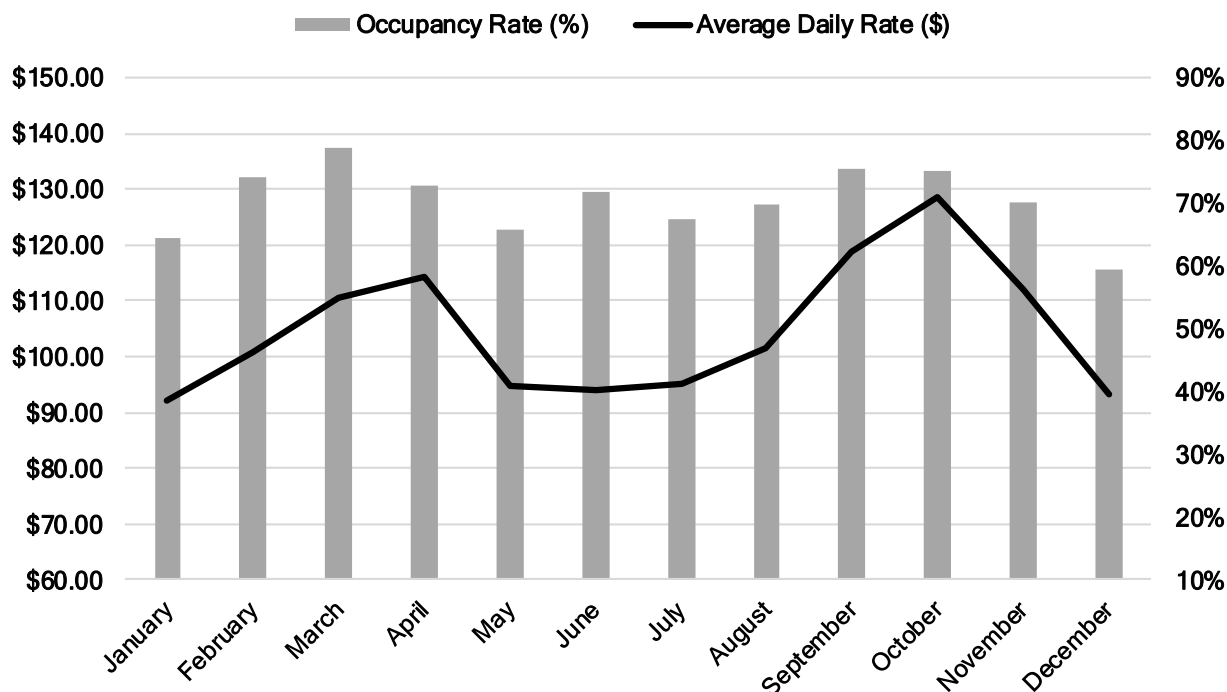
### MSA's\* with 500,000+ Population Within a 5-hour Drive

- 6 Miami-Ft. Lauderdale MSA  
6,076,113
- 7 Atlanta MSA  
5,891,925
- 8 Sarasota-Bradenton MSA  
800,171
- 9 Charleston MSA  
783,132
- 10 Cape Coral-Ft. Myers MSA  
719,287
- 11 Palm Bay MSA  
586,206





# 2017 HOTEL DATA



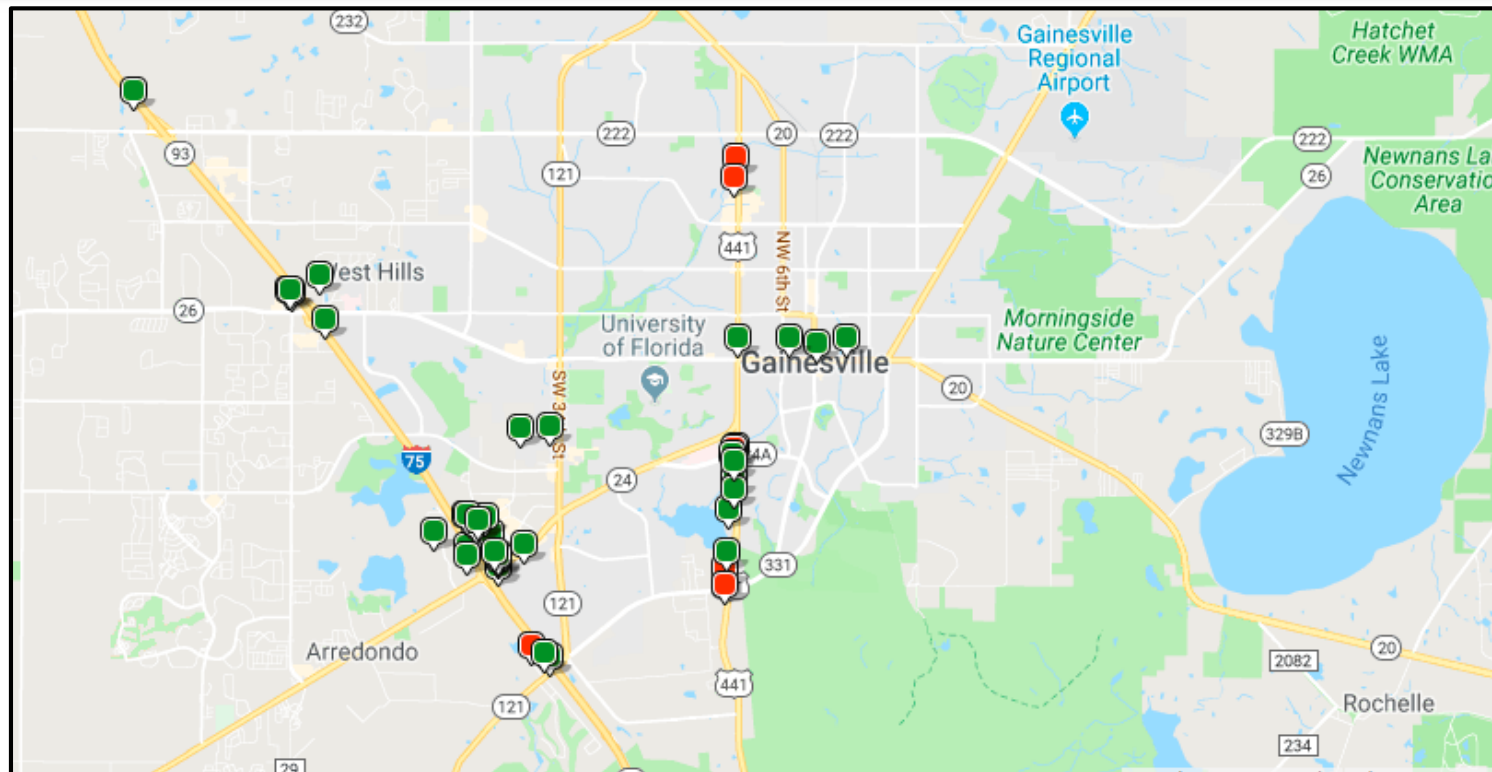
Source: Alachua County CVB

Nationwide, the Average Daily Rate (ADR) of hotels in 2017 was more than \$126 per night with 66% overall annual occupancy, whereas Alachua County hotel ADRs ranged from \$105 to \$145 per night throughout the calendar year, with occupancy rates ranging from approximately 59% to 79%.

Occupancy peaks in March and October. ADR peaks during October with lower visitation rates occurring in the summer and winter months. This apparent seasonality in visitation to Alachua County could pose a potential opportunity for new indoor venues in the summer and winter to fill underutilized hotel rooms at family-friendly rates.



# HOTEL INVENTORY



Source: Hotels.com, Google Maps

Note: Minimum 2-star hotel class

Convenient, affordable, family-friendly lodging (preferably within a 5 to 10 minute drive from an event venue, if not located on-site) is an important component of attracting and hosting multi-day tournament, tourism and event activity.

Victus found that lodging (minimum 2-star hotel class) near Gainesville is primarily concentrated in two locations: 1) south of Gainesville along U.S. Route 441, and 2) west of Gainesville near the intersection of I-75 and State Road 24. An additional small inventory of hotels can be found downtown.



### 3. COMPETITIVE & COMPARABLE MARKET & FACILITY ANALYSIS



# COMPARATIVE MARKETS



Based upon our community feedback process, which is described in detail later in this report, the Alachua County community identified sports, meeting, and event facilities in the following markets as potentially competitive or comparative with a new multi-use event center in Gainesville. Victus Advisors compared the Gainesville Metropolitan Statistical Area's demographic and socioeconomic characteristics to the competitive set of MSAs in Florida and the southeast (listed in alphabetical order below):

- Birmingham, Alabama
- Daytona Beach, FL
- Jacksonville, FL
- Lakeland, FL
- Myrtle Beach, SC
- Orlando, FL
- Tallahassee, FL
- Tampa, FL
- Virginia Beach, VA



# COMPARATIVE MARKETS - POPULATION

MSA	MSA Population
Tampa, FL	3,098,274
Orlando, FL	2,500,950
Virginia Beach, VA	1,772,840
Jacksonville, FL	1,523,615
Birmingham, AL	1,173,590
Lakeland, FL	667,696
Daytona Beach, FL	648,188
Myrtle Beach, SC	467,292
Tallahassee, FL	385,855
Gainesville, FL	283,059
<b>Average</b>	<b>1,252,136</b>
<b>Median</b>	<b>920,643</b>

*Source: Esri*

*Note: Sorted by Total Population in descending order*

The Gainesville MSA's population of 283,059 represents the least populated out of the 10 markets selected for comparative analysis. Given the smaller market size, it is important that seating/attendance capacities in a new event center be appropriately sized for the population base.



# COMPARATIVE MARKETS - POP. GROWTH

MSA	Annualized Pop. Growth (2000-2018)	Proj. Annual Pop. Growth (2018-2023)
Myrtle Beach, SC	3.1%	2.7%
Orlando, FL	2.4%	2.0%
Jacksonville, FL	1.7%	1.7%
Lakeland, FL	1.8%	1.6%
Daytona Beach, FL	1.5%	1.4%
Tampa, FL	1.4%	1.4%
Gainesville, FL	1.1%	1.1%
Virginia Beach, VA	0.6%	0.6%
Tallahassee, FL	1.0%	0.6%
Birmingham, AL	0.6%	0.5%
<b>Average</b>		<b>1.4%</b>
<b>Median</b>		<b>1.4%</b>

Source: Esri

Note: Sorted by Proj. Annual Pop. Growth in descending order

The projected population growth rate of the Gainesville MSA ranks seventh among the 10 comparative markets.



# COMPARATIVE MARKETS - MEDIAN AGE

MSA	Median Age
Gainesville, FL	32.3
Tallahassee, FL	33.7
Virginia Beach, VA	36.8
Orlando, FL	37.3
Jacksonville, FL	38.6
Birmingham, AL	39.0
Lakeland, FL	41.4
Tampa, FL	42.8
Myrtle Beach, SC	45.0
Daytona Beach, FL	47.8
<b>Average</b>	<b>39.5</b>
<b>Median</b>	<b>38.8</b>

*Source: Esri*

*Note: Sorted by Median Age in ascending order*

The Gainesville MSA's median age of 32.3 is lowest among comparative markets. This may be due to the student base at the University of Florida.





# COMPARATIVE MARKETS - YOUTH

MSA	Total Households	Households w/ Children Under 18	% of Households w/ Children
Lakeland, FL	249,123	173,193	69.5%
Virginia Beach, VA	664,644	448,358	67.5%
Birmingham, AL	459,752	306,666	66.7%
Orlando, FL	925,068	616,987	66.7%
Jacksonville, FL	588,042	390,449	66.4%
Myrtle Beach, SC	196,299	127,314	64.9%
Daytona Beach, FL	267,716	169,954	63.5%
Tampa, FL	1,257,748	776,149	61.7%
Tallahassee, FL	149,144	86,209	57.8%
Gainesville, FL	114,124	61,245	53.7%
<b>Average</b>	<b>487,166</b>	<b>315,652</b>	<b>63.8%</b>
<b>Median</b>	<b>363,734</b>	<b>239,930</b>	<b>65.6%</b>

Source: Esri

Note: Sorted by % of Households w/ Children in descending order

Nearly 54% of households in the Gainesville market have children, which ranks last amongst comparative markets. Again this may be due in part to the large student population at the University of Florida.

A large population of households with children can be a positive indicator for youth/amateur sports participation. Given the small youth population in the Gainesville MSA, it is important that a new event center be developed with a flexible layout and multiple uses, so as to tap into a wider variety of event demand.



# COMPARATIVE MARKETS - HOUSEHOLD INC.



MSA	Median Household Income	Adj. Median Household Income
Jacksonville, FL	\$56,587	\$64,085
Virginia Beach, VA	\$61,617	\$62,939
Birmingham, AL	\$53,468	\$61,317
Orlando, FL	\$53,891	\$57,761
Myrtle Beach, SC	\$50,339	\$55,136
Tallahassee, FL	\$49,103	\$54,378
Lakeland, FL	\$47,429	\$54,329
Daytona Beach, FL	\$48,067	\$53,646
Tampa, FL	\$51,596	\$53,578
Gainesville, FL	\$45,316	\$50,689
<b>Average</b>		<b>\$56,786</b>
<b>Median</b>		<b>\$54,757</b>

Sources: Esri, city-data.com

Note: Sorted by Adj. Median Household Income in descending order

The Gainesville market ranks last among comparative markets in terms of cost-of-living-adjusted median household income, which can be a potential indicator of household budgets available for spending on sports, entertainment, recreation, and leisure. Therefore, it is important that a new event center be developed with a flexible layout and multiple uses, so as to tap into a wider variety of event demand, users, and attendees.



# COMPARATIVE MARKETS - CORPORATE BASE

MSA	Total Businesses
Tampa, FL	102,138
Orlando, FL	87,141
Jacksonville, FL	55,098
Virginia Beach, VA	54,563
Birmingham, AL	41,365
Daytona Beach, FL	22,160
Myrtle Beach, SC	18,658
Lakeland, FL	16,982
Tallahassee, FL	14,510
Gainesville, FL	10,011
<b>Average</b>	<b>42,263</b>
<b>Median</b>	<b>31,763</b>

*Source: Esri*

*Note: Sorted by Total Businesses in descending order; Defined as NAICS recognized businesses.*

Among comparative markets, Gainesville ranks last in terms of business inventory, which can be an indicator for potential corporate sponsorship and naming rights support for new event facilities.

Within each comparable market, Victus analyzed facilities that could potentially be comparable or competitive to a new event center in Alachua County. We've classified them as **Sports Facilities**, **Conference & Meeting Facilities**, and **Event Centers**, and profiled them in the rest of this section.

## Sports Facilities

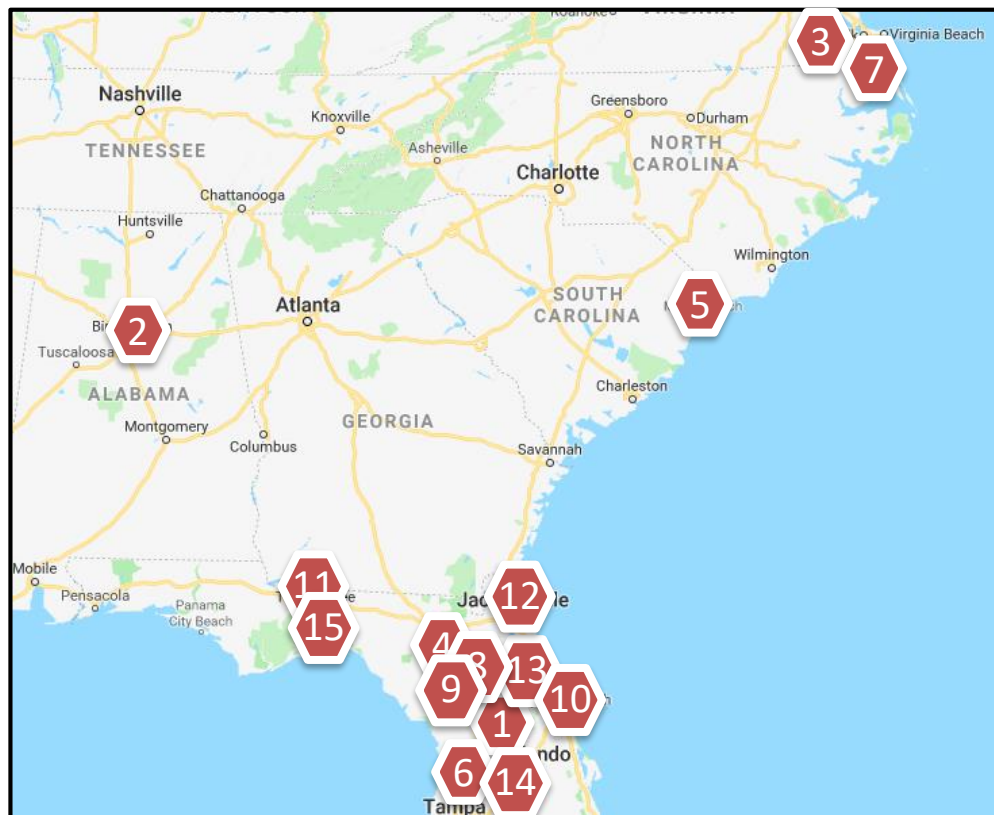
1. The Big House - Tavares, FL
2. Birmingham Crossplex - Birmingham, AL
3. Boo Williams Sportsplex - Hampton, VA
4. Legacy Park Multipurpose Center - Alachua, FL
5. Myrtle Beach Sports Center - Myrtle Beach, SC
6. Pasco Sports Complex - Pasco County, FL
7. Virginia Beach Sports Center - Virginia Beach, VA

## Convention & Meeting Facilities

8. Best Western Grand Gateway - Gainesville, FL
9. Hilton University of Florida - Gainesville, FL
10. Ocean Center - Daytona Beach, FL
11. Turnbull Florida State Conference Center - Tallahassee, FL

## Event Centers (Concert & Arena Events)

12. Veterans Memorial Arena - Jacksonville, FL
13. O'Connell Center - Gainesville, FL
14. RP Funding Center - Lakeland, FL
15. Tucker Civic Center - Tallahassee, FL



Source: Google Maps



### 3. COMPETITIVE & COMPARABLE MARKET/FACILITY ANALYSIS: A. SPORTS FACILITIES



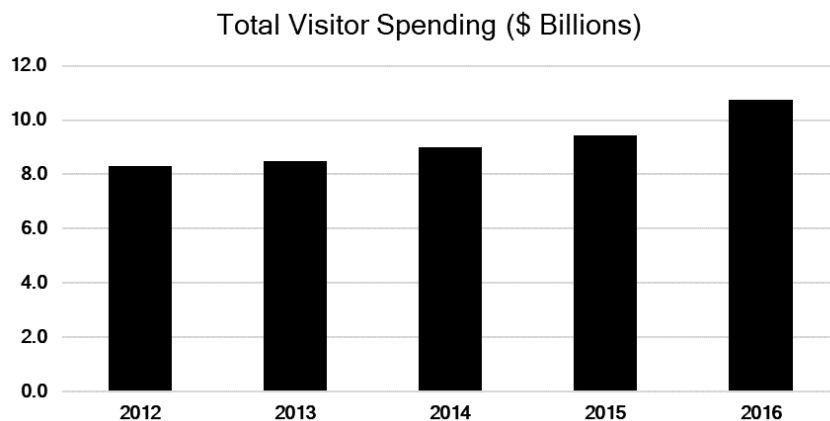
# SPORTS TOURISM TRENDS

## What is Sports Tourism?

Sports Tourism is regional or national travel to observe or participate in a sporting event. The typical sports tourism traveler is a family traveling via car within a 5-6 hour drive range for youth/amateur sports tournaments.

## Economic Impact of Sports Tourism

Visitor spending via sports tourism is typically captured via room nights/hotel spending, restaurants, retail, and local entertainment and cultural attractions. In 2016, US sports tourism eclipsed \$10 billion in annual visitor spending:



Visitor spending related to sports events was \$10.5 billion in 2016, a 10% increase from 2015 and 26% increase since 2012.

Source: National Association of Sports Commissions, 2017

## Youth/Amateur Team Sports Participation

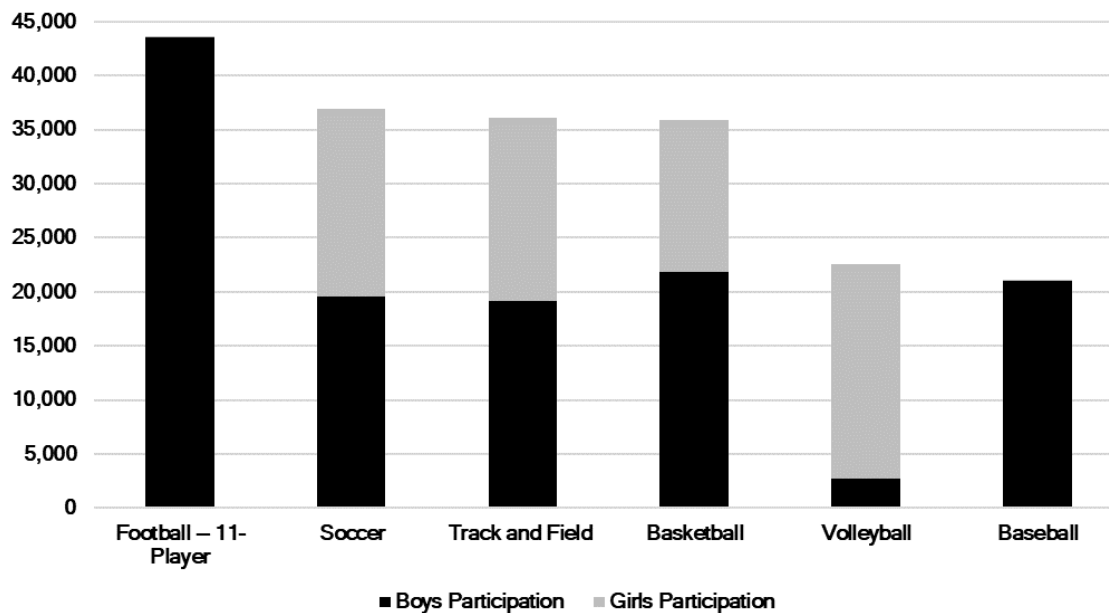
Sport	Participants
Soccer (Outdoor + Indoor)	9,828,000
Basketball	9,694,000
Baseball + Fast-Pitch Softball	8,333,000
Football (Tackle)	3,254,000
Gymnastics	2,809,000
Volleyball	2,680,000
Football (Touch)	2,032,000
Slow-Pitch Softball	1,004,000
Wrestling	805,000
Lacrosse	804,000
Rugby	301,000

*Note 1: Sorted by Participants / Note 2: Ages 6-Source: 2015 SFIA  
U.S. Trends in Team Sports Report*

As seen in the chart above, the three largest youth team sports categories in the U.S. by participation are currently soccer, basketball, and baseball/softball. Nationally, youth participation in football (both tackle and touch) has decreased considerably over the past decade. This trend could be correlated to fear of long-term health effects (concussions, etc.).



## High School Sports Participation in Florida



Source: National Federation of High School Associations

Note: Sorted by total participants in descending order

**Football** has the highest number of high school boy participants in Florida, while **Volleyball** have the highest number of high school girl participants. **Track and Field** has strong participation from both the boys and girls.



# SPORTS TOURISM TRENDS (CONT.)

## Sports Tourism Site Selection Factors

According to the NASC\*, tournament organizers focus on four (4) key factors when making their site selections:

- #1 ... Quality of Sports Venues
- #2 ... Proximity and Access
- #3 ... Hotels and Amenities
- #4 ... Reputation and Brand

In regards to these factors it should be noted that most tournament operators will not even consider a location that does not have the ideal venues they require (#1). Furthermore locating a new sports complex on a site with convenient access (#2 & #3) to the freeways and attractions would also be attractive for sports events. Lastly, reputation and brand (#4) within the sports tourism industry could be developed over time, once a sports complex is in place, by developing a track record of attracting and servicing successful events.

\* NASC: National Association of Sports Commissions

## Sports Tourism Site Selection Factors (Cont.)

### 1. SPORTS TOURISM VENUES



Alachua County currently lacks indoor sports facilities for sports tourism. This factor was confirmed through interviews with local stakeholders and sports tourism event organizers.

### 2. PROXIMITY & ACCESS



There are five large markets (with a population of more than 500,000 people each) within a 2.5-hour drive of Alachua County. An additional six large markets are within a 5-hour drive (overnight trip), with a total population within a 5-hour drive of Gainesville of nearly 15 million people.

### 3. HOSPITALITY AMENITIES



Nationwide, the Average Daily Rate (ADR) of hotels in 2017 was more than \$126 per night with 66% overall annual occupancy, whereas Alachua County hotel ADRs ranged from \$105 to \$145 per night throughout the calendar year, with occupancy rates ranging from approximately 59% to 79%.

### 4. REPUTATION



The Gainesville Sports Commission has a great reputation with regional and national event organizers. Additionally local groups have worked with the Commission to bring in events.



# SPORTS TOURISM TRENDS (CONT.)

## Key Trends Related to Quality Sports Tourism Venue Best Practices:

- *Location* - The majority of tournament and event organizers Victus has spoken with for numerous studies cite the venue's proximity to highways, hotels, restaurants, and retail as some of the most important factors in deciding where to host an event.
- *Quantity of Fields and/or Courts* - Victus has found that tournament and event organizers stress the preference for a facility that has at least eight fields (for outdoor sports) or eight courts (for indoor sports) to host larger events. These events tend to attract dozens or more teams which can equate to hundreds of rooms nights per event and thus spur a larger economic impact for the host community. Additionally, organizers prefer a venue where all its games can be held, rather than have participants travel to multiple venues in the same market.
- *Quality of Venues* - Victus has found that the quality of sports facilities tends to be the primary factor for sports tourism participants (athletes, coaches, and spectators) in determining which markets/destinations they prefer to visit for sports events.
- *Technology* - It is important that facilities be kept up-to-date in terms of technological features that make the facilities more attractive to event organizers, participants, and families, including free WiFi access at all facilities, modern sound systems and video displays, plug and play live streaming solutions, and digital marketing interactivity via Facebook, Instagram, etc.
- *Flexible Programming Opportunities* - Cheer/dance competitions, pickleball and other emerging sports need larger indoor space for events. In addition, eSports is a rapidly growing trend. Programming for esports can range widely from afterschool local clubs or groups to hosting professional tournaments and leagues. Esports is one of the fastest growing activities worldwide. Flexibility in floor modifications and scheduling can help fill year-round activity at sports venue.

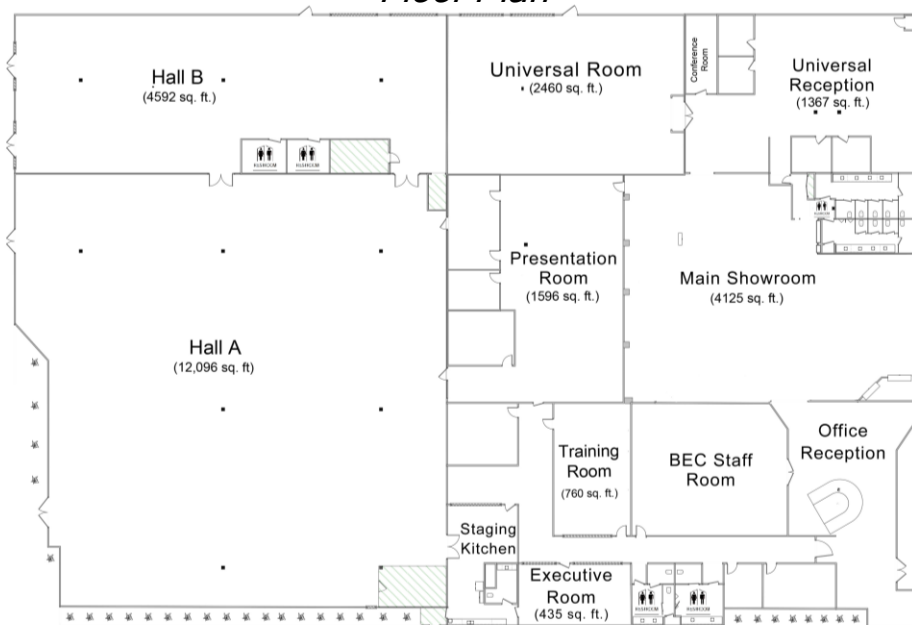
# THE BIG HOUSE

- Location: Tavares, FL
- Owner/Operator: Private
- Footprint: 162,000 sq. ft.
- Features:
  - 16 volleyball courts or 9 basketball courts
- Sample Events:
  - Basketball and volleyball tournaments/leagues

## THE BIGHOUSE



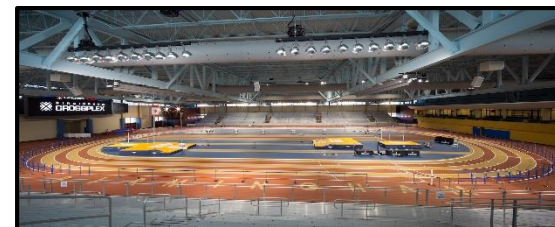
*Floor Plan*



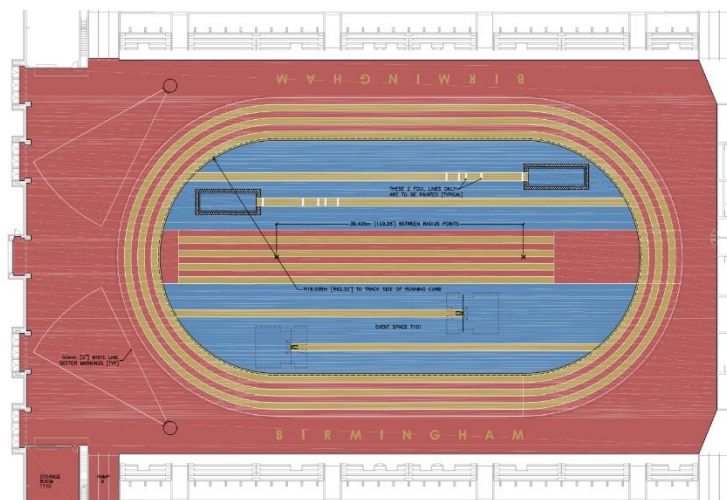
The Big House primarily hosts basketball and volleyball events. The venue has hosted several AAU events in these sports. Additional venue-sponsored leagues also play at the facility.

# BIRMINGHAM CROSSPLEX

- Location: Birmingham, AL
- Owner/Operator: City of Birmingham
- Complex Footprint: 221,000 sq. ft.
- Features:
  - 200-meter hydraulic banked indoor track
  - 9 volleyball courts (laid over track)
  - 4,000 seats and 7 VIP suites around track
  - Lynx timing system and 60' x 25' digital scoreboard
  - 5,000-seat arena, swimming facility, meeting space



*Floor Plan*



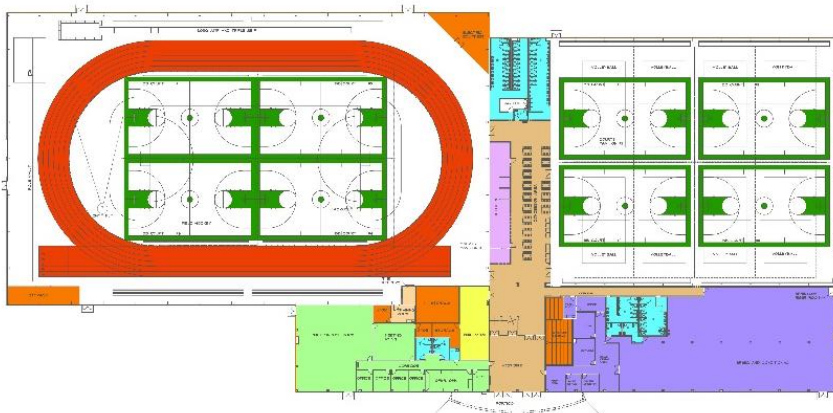
The Crossplex is one of the nearest indoor track facilities to Gainesville. The facility has hosted a variety of track events that include youth meets, high school state championships, regional and national club level championships, and collegiate invitations and championships. The Crossplex also hosts swim meets and volleyball tournaments.

# BOO WILLIAMS SPORTSPLEX

- Location: Hampton, VA
- Owner/Operator: Public/Private Partnership
- Footprint: 135,000 sq. ft.
- Features:
  - 8 basketball courts or 12 volleyball courts
  - 8 indoor hockey fields
  - Cheerleading and gymnastics area
  - 6-lane flat indoor track
  - 4,000 retractable seats
  - Training rooms and facilities



*Floor Plan*



The Sportsplex hosts approximately 40 multi-day basketball tournaments as well other sports. According to a 2015 study, the Sportsplex generates over 15,000 annual room nights in Hampton.

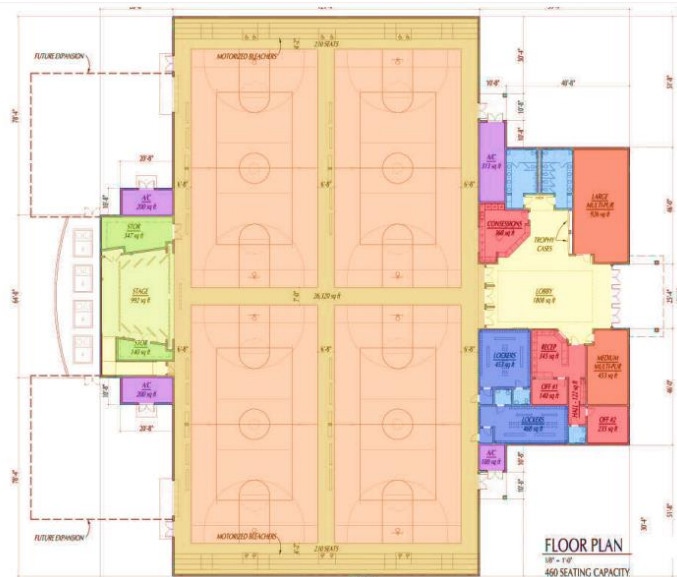


# LEGACY PARK MULTIPURPOSE CENTER

- Location: Alachua, FL
- Owner/Operator: City of Alachua
- Footprint: 40,000 sq. ft.
- Features:
  - 4 basketball or volleyball courts
  - Performance stage and multipurpose rooms
- Sample Events:
  - Basketball and volleyball tournaments/leagues
  - Other community, cultural arts, and recreational events



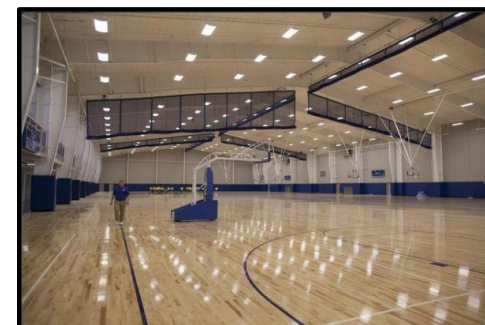
## Floor Plan



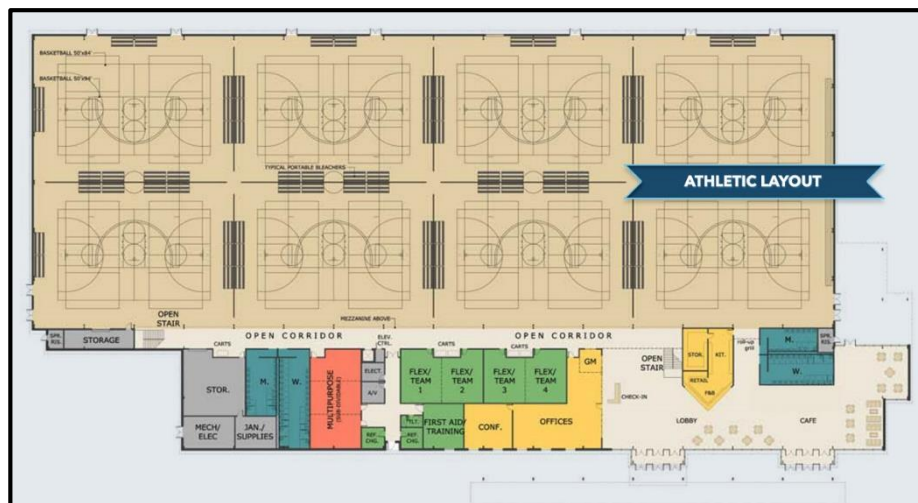
The Multipurpose Center opened in 2017. It is mostly used for local and community events. US Amateur Basketball used the courts for their national championship. A new event center could complement the Legacy Park venue and could partner together to host some larger events.

# MYRTLE BEACH SPORTS CENTER

- Location: Myrtle Beach, SC
- Owner/Operator: City of Myrtle Beach/Sports Facilities Management (SFM)
- Footprint: 100,000 sq. ft.
- Features:
  - 8 basketball or 16 volleyball courts
  - 4 flex rooms (meetings, locker rooms, etc.)
- Sample Events:
  - National and regional tournaments for basketball, volleyball, pickleball, wrestling, and gymnastics, etc.
  - Meetings and conventions



*Floor Plan*



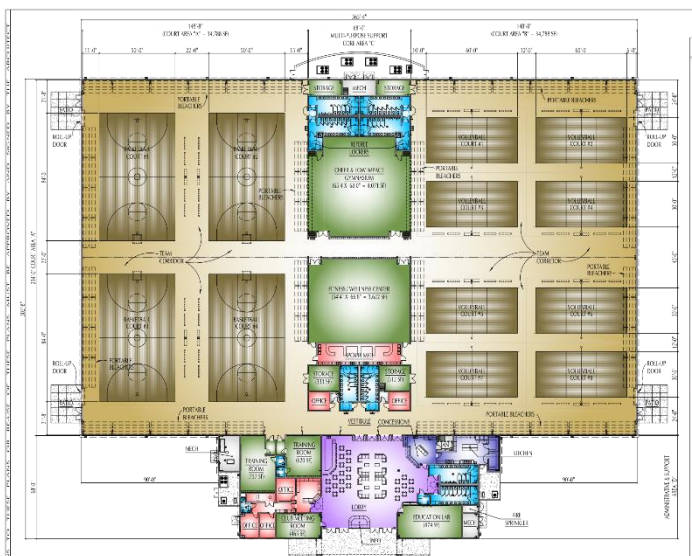
The Sports Center is reconfigurable as a convention/meeting space. The Center opened in 2015 and hosts national and regional sporting events.

# PASCO SPORTS COMPLEX AT WIREGRASS

- Location: Pasco County, FL
- Owner/Operator: Radd Sports
- Footprint: 98.000 sq. ft.
- Features:
  - 8 basketball courts
  - Cheerleading and gymnastics area
  - Fitness center
  - Hotel - 100+ room Marriott-branded hotel
  - Amphitheater and outdoor sports fields / event lawn



## Floor Plan



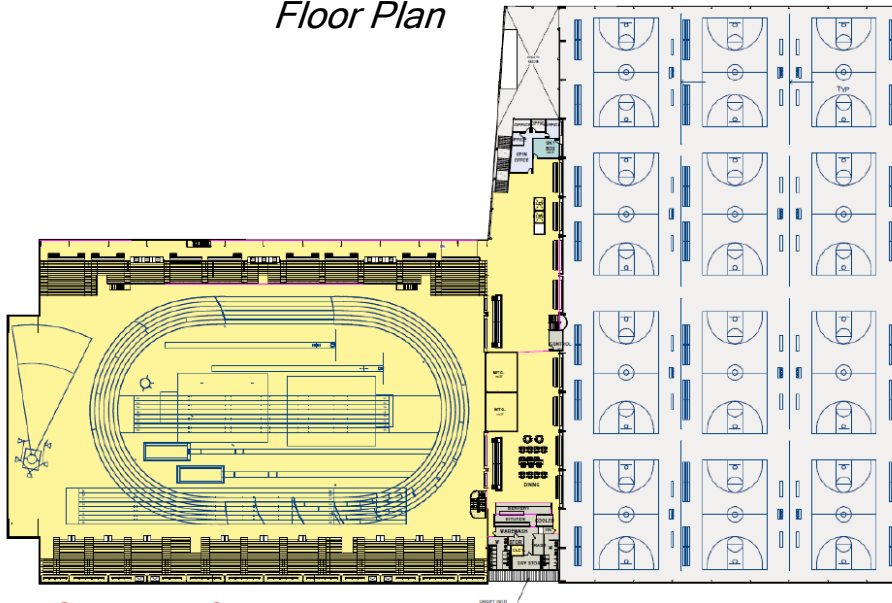
The Sports Complex is under construction and estimated to be completed in Fall 2019. The venue is approximately 100 miles south of Gainesville.

# VIRGINIA BEACH SPORTS CENTER

- Location: Virginia Beach, VA
- Expected completion: Fall 2020
- Owner/Operator: Public/Private
- Footprint: 285.000 sq. ft.
- Features:
  - 12 basketball or 24 volleyball courts
  - 1 hydraulic banked track with 5,000 fixed seats
  - Flexible floor space for other sports such as gymnastics



*Floor Plan*



The Virginia Beach Sports Center is estimated to be completed in Fall 2020. The total construction project, including the construction of a parking garage, is budgeted in excess of \$60 million.



# SUMMARY OF SPORTS FACILITIES

Facilities:	Location:	Court/Field Inventory					Square Footage
		Basketball	Volleyball	Cheer/Gym	Indoor Fields	Indoor Track	
The Big House	Tavares, FL	9	16	-	-	-	162,000
Birmingham Crossplex	Birmingham, AL	-	9	-	-	1	221,000
Boo Williams Sportsplex	Hampton, VA	8	12	1	8	1	135,000
Legacy Park Multipurpose Center	Alachua, FL	4	4	-	-	-	40,000
Myrtle Beach Sports Center	Myrtle Beach, SC	8	16	-	-	-	100,000
Pasco Sports Complex	Pasco County, FL	8	-	1	-	-	98,000
Virginia Beach Sports Center	Virginia Beach, VA	12	24	1	-	1	285,000
<b>AVERAGE</b>		8	14	1	8	1	148,714
<b>MEDIAN</b>		8	14	1	8	1	135,000

Source: Victus research

Note: Sorted by Facilities in alphabetical order

## COMPARATIVE SPORTS FACILITY NOTES

As shown above, facilities capable of hosting regional, multi-day tournament activity typically have at least eight (8) courts or fields. The dedicated sports court facilities with at least 8 courts (and no indoor track) range from approximately 98,000 to 162,000 square feet.

The three facilities with indoor tracks also have the ability to host other sports activity when indoor track is not in season. The indoor track venues range from 135,000 to 285,000 square feet. It should be noted that the larger track facilities in terms of square footage (Birmingham and Virginia Beach) feature larger seating capacities upwards of 5,000 people to host major NCAA track and field meets.

In order to accommodate indoor sports courts, trade shows/expos, and indoor track with spectator seating for regional meets, it is likely that a new multi-use event center in Gainesville would require a larger square footage than the County's preliminary facility concepts (of approximately 92,000 sq. ft.).





### 3. COMPETITIVE & COMPARABLE MARKET/FACILITY ANALYSIS: B. CONVENTION & MEETING FACILITIES



## Conference/Meetings Industry & Event Types

Conference/meeting events are held throughout the country and are opportunities for business, religious groups, etc. to network and share best practices among other initiatives. The various conference and meeting event types can typically be defined as follows:

- *Banquet* - Generally formal celebrations organized by a company or organization to celebrate achievements within the organization and to boost employee and member morale. Typically require carpeted venues with banquet catering capabilities.
- *Meetings & Conferences* - Meeting or gathering of a company/organization of a shorter duration than a convention and designed to meet a specific objective. Typically held in carpeted venues.
- *Convention* - A large gathering of people with a shared interest. These events are usually scheduled at a specific time each year. Conventions typically have presentations that familiarize attendees with advancements or trends within a their particular field of interest. Often held in large convention facilities with both carpeted and concrete/flat floor space.
- *Expositions (Expos)* - Large scale exhibition or expositions are typically conducted in column-free, concrete floor space, such as a convention hall or arena/event center with retractable seating.
- *Trade Shows* - These event types are an opportunity for companies to exhibit some of their latest products, as well as yet to be released prototypes to journalists as well as others in the industry. Typically conducted in column-free, concrete floor space, such as a convention hall or arena/event center with retractable seating.





## Typical Venues for Expos & Trade Shows

As noted on the prior page, in order to attract larger events such as conventions, expos, and trade shows, a large, column-free, flat-floor space is required. It is worth noting that the current Alachua County meeting/event facilities (which are highlighted in this section) are not big enough spaces to host these larger events, with no individual indoor conference/meeting space larger than 6,900 square feet in the County. Based upon a review of Alachua County's market characteristics and preliminary concept plans for a multi-purpose event center, Victus Advisors believes that a multi-purpose event center in Alachua County could utilize retractable seating to create a larger, concrete flat-floor space than currently exists in the County to appeal to small/medium-sized conferences, trade shows, and expos. Please note that Section 4 of this report contains interview highlights from some of these event types.

## Economic Impact

Oxford Economics recently released data regarding the meetings and events industry for 2016. It found that the industry had the following economic impact:

- 1.9 million meetings were held in 2016 with over 250 million participants
- Meetings generated 300 million room nights
- \$325 billion of direct spending and \$845 billion in business sales
- International attendees represented only two percent of total attendees, but accounted for 11 percent of spending



## Facility Trends

The International Association of Venue Managers (IAVM) highlights the following five (5) key trends that would impact convention venues in 2017:

1. Greater diversity of events at each facility
2. Improved food and beverage options on site
3. Differentiate facility by promoting surrounding areas (nightlife, restaurants, lodging, etc.)
4. Technological amenities such as virtual tours and 3D mapping
5. Provide flex space at facility that allow for interactive events or other entertainment to engage attendees

It should be noted that having the requisite space and total number of hotels and committable sleeping rooms is still the primary driver for securing these events, however these trends can help differentiate facilities within a crowded market. It is highly recommended that Alachua County consider these factors when designing a new multi-use event center.

# BEST WESTERN GATEWAY GRAND

- Location: Gainesville, FL
- Owner/Operator: Private
- Features:
  - 8,000 sq. ft. of total meeting space on-site at hotel
- Sample Events:
  - Weddings, parties, corporate meetings



The hotel has several different sizes of meeting rooms to accommodate smaller events such as weddings, banquets/parties, or corporate gatherings.



# HILTON UNIVERSITY OF FLORIDA CONFERENCE CENTER

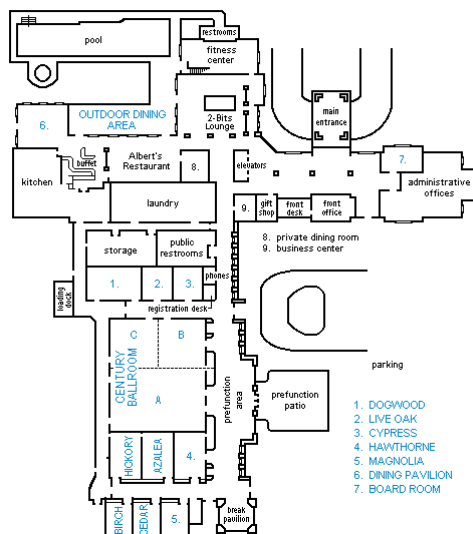


- Location: Gainesville, FL
- Owner/Operator: Hilton
- Features:
  - 25,000 sq. ft. of total meeting space
  - Largest single room is 6,860 sq. ft.
- Sample Events:
  - Meetings, conferences, events, and weddings



## Floor Plan

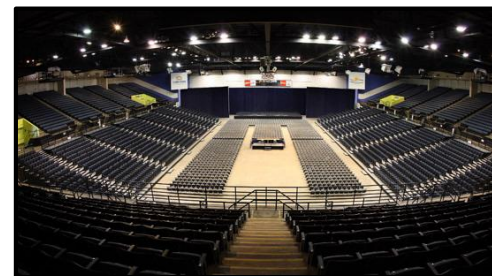
HILTON GAINESVILLE / UNIVERSITY OF FLORIDA CONFERENCE CENTER  
MAIN LEVEL



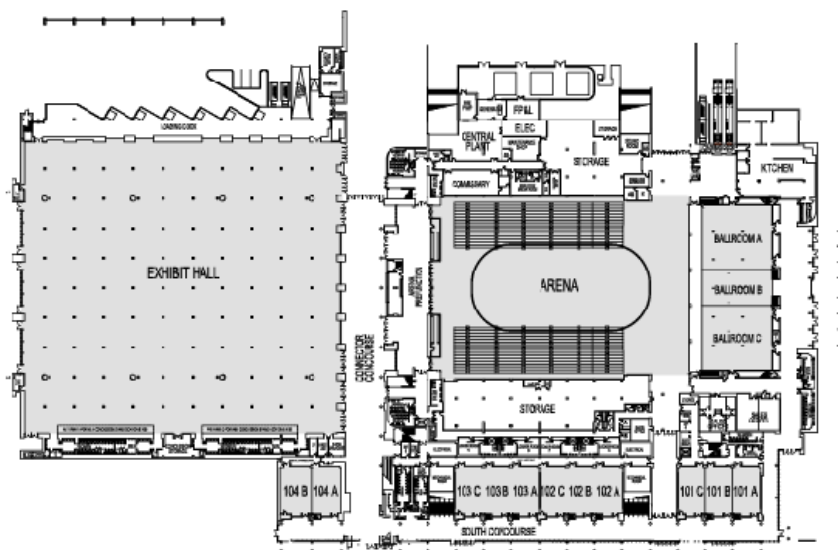
The hotel is located adjacent to the University of Florida and near I-75 in Gainesville. The conference center hosts events ranging in size from small meetings to conferences.

# OCEAN CENTER

- Location: Daytona Beach, FL
- Owner/Operator: Volusia County
- Features:
  - 205,000 total sq. ft.
  - Arena, ballroom, exhibit hall, 32 breakout rooms
- Sample Events:
  - Banquets, trade shows, sporting events, graduations, conventions, etc.



*Floor Plan*



The Ocean Center has a convention center with a main exhibit hall, a sports arena, as well as other additional rooms for presentations or meetings. The Center's proximity to the beach is a draw for many visitors.



# AUGUSTUS B. TURNBULL III FLORIDA STATE CONFERENCE CENTER



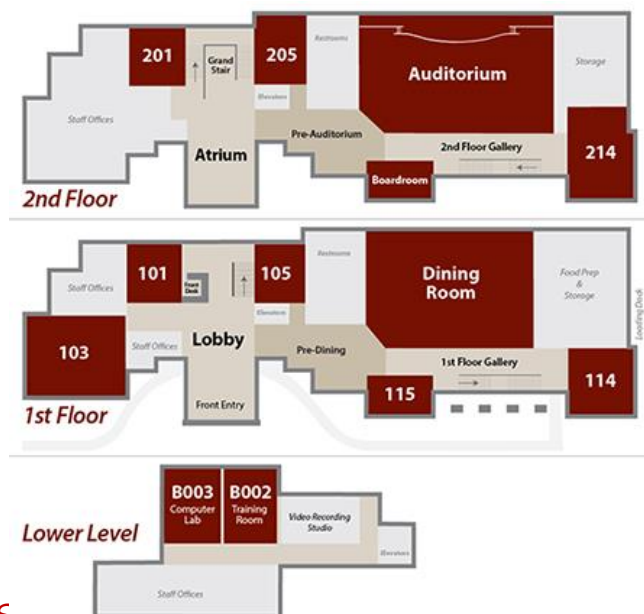
- Location: Tallahassee, FL
- Owner/Operator: Florida State University
- Features:
  - 350-seat auditorium, a 280-seat dining room
  - 47,000 sq. ft. of total space
- Sample Events:
  - Conferences, meetings, professional & community events



Augustus B. Turnbull III  
FLORIDA STATE CONFERENCE CENTER



## Floor Plan



The Conference Center is located near to the Tucker Civic Center. The Center hosts both university and non-university events.



# SUMMARY OF MEETING FACILITIES

<b>Facilities:</b>	<b>Location:</b>	<b>Total Size (Sq. Ft.)</b>	<b>Meeting Rooms</b>	<b>Events Served</b>
Best Western Gateway Grand	Gainesville, FL	8,000	6	Meetings, conferences, parties, weddings
Hilton University of Florida	Gainesville, FL	25,000	10	Meetings, conferences, events, weddings
Ocean Center	Daytona Beach, FL	205,000	32	Conventions, expos, large meetings, indoor sports
Turnbull Florida State Conference Center	Tallahassee, FL	47,000	11	Meetings, conferences, events, weddings
<b>AVERAGE</b>		71,250	15	
<b>MEDIAN</b>		36,000	11	

*Source: Victus research*

*Note: Sorted by Facilities in alphabetical order*

## COMPARATIVE MEETING FACILITY NOTES

As shown above, the facilities analyzed have meeting rooms ranging from six (6) to 32 and square footage between 8,000 and 205,000.

Many larger facilities have multiple venues/rooms to accommodate flat floor (trade shows, expos) in large column free space, plus carpeted meeting and banquet rooms of varying sizes for meetings and conferences. Whereas, venues in mid-size markets tend to be more focused on a particular sector of the convention industry, such as fully-carpeted facilities that cater to meetings and associations, etc.

Gainesville currently only has venues that can accommodate smaller meetings/conferences. The two facilities have carpeted meeting spaces, however Alachua County is unable to attract larger events such as conventions and trade shows that require flat, concrete floors.





### 3. COMPETITIVE & COMPARABLE MARKET/FACILITY ANALYSIS: C. EVENT CENTERS



# CONCERT & ARENA EVENTS

In addition to sports activity, expos, and trade shows, many multi-purpose event centers also host a significant annual calendar of concerts, family shows, and other entertainment events.

## Concerts

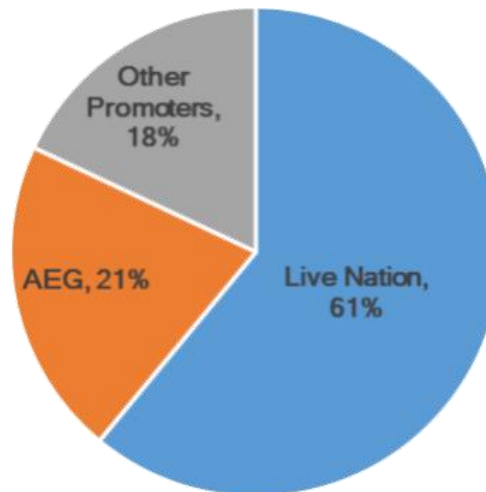
Analysis of the Gainesville competitive landscape indicates that the O'Connell Center is the only venue in the marketplace that can accommodate large, touring concerts, which typically book arenas/event centers ranging from 5,000 to 20,000 seats, with large marshalling areas for staging and numerous dressing rooms for talent. However, the O'Connell Center lost some rigging capacity during its recent renovation, and O'Connell Center staff indicated that the Gainesville market is not considered a strong concert market by promoters.

## Family Shows

Family shows are events typically held in arenas/event centers that cater to spectators of all ages and include a wide variety of events including Sesame Street Live, Circuses, and Ice Shows, among others. A new venue's ability to attract events such as family shows will depend somewhat on the physical characteristics of the facility as well as the demographic make-up of the local population. Based upon our experience in the arena/event center industry, most family shows prefer to rent larger arenas (8,000 or more seats) for multiple days in that market, while hosting several daily shows.

## U.S. Concert/Entertainment Market Share

It is estimated that Live Nation and AEG control approximately 82% of the arena/event center performance market in the United States (as seen in the pie chart below), giving them significant influence over both talent booking and the selection of concert venues for tours. As such, the most successful concert venues tend to have long-term operating or booking agreements with Live Nation or AEG.



*Source: Pollstar*

*Note: Market share by 2016 ticket sales*

As a result of all the factors described above and on the previous slide, it is expected that a new multi-purpose event center in Alachua County would not consistently attract touring concert and family show activity. Any concert activity held in the facility is likely to be smaller, local concert activity.

- Location: Jacksonville, FL
- Owner/Operator: City of Jacksonville
- Arena Floor Footprint: 27,000 sq. ft.
- Features:
  - 15,000 seat arena
- Sample Events:
  - Concerts, shows, meetings, expos, sporting events



## Floor Plan



The Arena hosts large concerts and is also home to multiple minor-league sports franchises. The arena is within approximately 80 miles of Gainesville and represents one of the nearest major markets to Alachua County.

# STEPHEN C. O'CONNELL CENTER

- Location: Gainesville, FL
- Owner/Operator: University of Florida
- Arena Floor Footprint: 20,000 sq. ft.
- Features:
  - 10,136 seat arena
  - Additional 25,000 sq. ft. (concourse level) available for exhibit space
- Primary Events:
  - University of Florida athletics, graduations



## Floor Plan



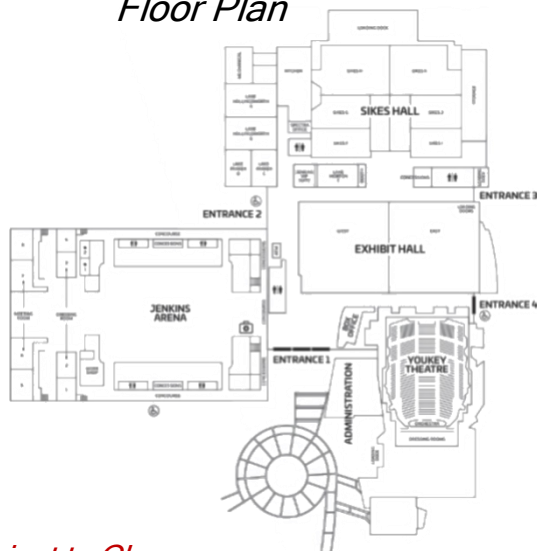
The O'Connell Center's events have changed since its renovation. The facility now prioritizes University of Florida athletics events and graduations.

# RP FUNDING CENTER

- Location: Lakeland, FL
- Owner/Operator: City of Lakeland
- Arena Floor Footprint: 25,000 sq. ft.
- Features:
  - 4,600 seat arena
  - 2,226 seat theatre
  - 100,000 sq. ft. of total exhibit space
- Sample Events:
  - Concerts, shows, meetings, expos, sports tournaments and events (Lakeland Magic)



*Floor Plan*



The Center is the home of the NBA G-League Lakeland Magic. The Center's arena, theater, and convention space allow for flexibility in hosting a wide variety of events, tournaments, and shows.

# DONALD L. TUCKER CIVIC CENTER

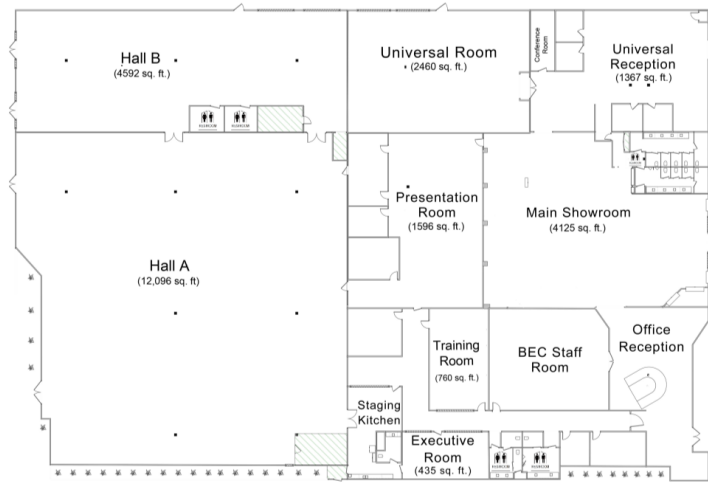
- Location: Tallahassee, FL
- Owner/Operator: Florida State University
- Arena Floor Footprint: 18,900 sq. ft.
- Features:
  - 12,500 seat arena
  - 4 meeting rooms
  - 1 exhibit hall
  - 70,000 sq. ft. of total exhibit space
- Sample Events:
  - Concerts, meetings, expos, Florida State athletics



**Donald L. Tucker Civic Center**  
FLORIDA STATE UNIVERSITY



## *Floor Plan*



The Civic Center has a different configurations and additional room space to host different types of events and expos.





# SUMMARY OF ENTERTAINMENT FACILITIES

<b>Facilities:</b>	<b>Location:</b>	<b>Arena Seating Capacity</b>	<b>Arena Floor Space Sq. Ft.</b>	<b>Max Exhibit Floor Space Sq. Ft.</b>	<b>Events Served</b>
Jacksonville Veterans Memorial Arena	Jacksonville, FL	15,000	27,000	27,000	Events, concerts, professional sports
O'Connell Center	Gainesville, FL	10,136	20,000	45,000	Events, university athletics, graduations
RP Funding Center	Lakeland, FL	4,600	25,000	100,000	Events, concerts, meetings, professional sports
Tucker Civic Center	Tallahassee, FL	12,500	18,900	70,000	Events, concerts, university athletics
<b>AVERAGE</b>		10,559	22,725	60,500	
<b>MEDIAN</b>		11,318	22,500	57,500	

*Source: Victus research*

*Note: Sorted by Facilities in alphabetical order*

## COMPARATIVE ENTERTAINMENT FACILITY NOTES

As shown above, the facilities analyzed have arena floor space square footage between 18,900 and 27,000. Max exhibit floor space square footage is between 27,000 and 100,000.

Each of these facilities hosts similar events such as professional and collegiate sporting events, concerts, and other entertainment events.



# KEY TAKEAWAYS FOR GAINESVILLE

- The most important factors for attracting **Sports Tourism** are a) the quality of sports venues, b) proximity and transportation access, and c) hotels and hospitality amenities. The Sports Tourism industry is large and growing, and a tournament-caliber sports facility could have a significant impact on Alachua County if a venue is large enough (ideally with up to 8 indoor courts and indoor track capabilities) and located within close proximity of highways, hotels, and other hospitality amenities.
- **Expos and Trade Shows** are typically conducted in column-free, concrete floor space, such as a convention hall or arena/event center with retractable seating. Victus Advisors believes that a multi-purpose event center in Alachua County could utilize retractable seating to create a larger, concrete flat-floor space than currently exists in the County to appeal to small/medium-sized conferences, trade shows, and expos. Requisite floor space and total number of hotels with committable sleeping rooms are the primary drivers for securing these events, however trends such as a) flexibility to host a greater diversity of event types, b) improved food and beverage options, and c) appealing surrounding areas (with nightlife, restaurants, lodging, etc.), can help differentiate facilities within a crowded market.
- Due to the size of the Alachua County market and the nature of the concert/entertainment event industry, it is expected that a new multi-purpose event center in Alachua County would not consistently attract touring **Concert and Family Show** activity. Any concert activity held in the facility is likely to be smaller, local concert activity.
- In order to accommodate indoor sports courts, trade shows/expos, and indoor track with spectator seating for regional meets, it is likely that a new multi-use event center in Alachua County would require a larger **Square Footage** than the County's preliminary facility concepts (of approximately 92,000 sq. ft.).



## 4. INTERVIEW SUMMARIES



# INTRODUCTION



As a key part of our market research process, Victus Advisors conducted two types of interviews:

- A. One-on-One Interviews in Alachua County with key stakeholders from 15 community groups and organizations.
- B. Telephone Interviews with 21 individuals from potential event center user groups.

These interview results were used by Victus Advisors to provide input to our market demand study.

Key highlights from each type of interview are presented within this section.



## 4. INTERVIEW SUMMARIES: A. ONE-ON-ONE INTERVIEWS



# ONE-ON-ONE INTERVIEWS



In September 2018, Alachua County identified participants and scheduled a series of one-on-one interviews for Victus Advisors. The goals of these interviews were to gather feedback from key stakeholders and community leaders regarding the market potential for a new event center in Gainesville. The set of topics and questions included perceptions of Alachua County and its current event venue offerings, possible comparable and competitive venues and markets, and other feedback concerning the potential new event center.

**ONE-ON-ONE INTERVIEWS** - Victus Advisors conducted in-person interviews with representatives from the following 15 groups:

- Alachua County Commission
- Alachua County Hospitality Council
- Alachua County School Board
- Alachua County Tourist Development Council
- City of Gainesville
- Economic Development Advisory Council
- Florida Community Design Center
- Gainesville Chamber of Commerce
- Gainesville Sports Commission
- O'Connell Center
- Plan East Gainesville
- Radd Sports
- Recreation & Open Space Advisory Committee (ROSCO)
- Roller Rebels
- Stephen Foster Neighborhood

Key highlights of these interviews are summarized by topic in the following pages. The highlights presented tend to focus on the topics and sentiments that were raised by multiples interviewees.



# INTERVIEW SUMMARIES

## Perceptions of Current Event Facilities in Alachua County

Almost every interviewee mentioned the O'Connell Center as the primary event venue in Alachua County. Since the renovation of the O'Connell Center, several events have been displaced from the venue including indoor track and field events, Cirque du Soleil, and some exhibition shows. Several people mentioned that the O'Connell Center is not easily accessible to groups outside of the University of Florida. Booking of the facility must be made up to a year in advance for non-university events and is cost prohibitive for some organizations. In the past, the County had depended on the O'Connell Center as its sole event venue. The Center still hosts school graduations and only a few concerts.

Other people interviewed brought up hotels as another option for meetings in Gainesville. An individual said that the hotels can only hold up to 500 people per event, which limits the size and number of events that can be held in the City.

The Legacy Park Multipurpose Center was another venue mentioned by interviewees. The Center is located in and owned by the City of Alachua. The primary focus of the Center is to serve the needs of the local community. It hosts many recreational, cultural arts and community events.





# INTERVIEW SUMMARIES (CONT.)



## Perceptions of Current Event Facilities in Alachua County (Cont.)

Many expressed that Gainesville lacks a space for local meetings, conventions, and conferences. One interviewee mentioned that some companies must go to other markets (Orlando and Jacksonville) for employee events and conferences.

A concert venue (outside of the O'Connell Center and University concerts) is not present in the market. Some indicated their desire for such a venue while others do not see Gainesville as a significant market for concerts.

Overall, many feel that the current inventory of event facilities in Alachua County is lacking. Those who were interviewed expressed their opinion that there is a demand and need for a new event space in Alachua County.



# INTERVIEW SUMMARIES (CONT.)



## Competitive Markets

Florida cities and markets made up the majority of responses regarding markets competitive to Alachua County. Ocala (Marion County) and Tallahassee (Leon County) were cited by many as the nearest and most comparable markets. One interviewee said that Ocala and Marion County are planning to develop a new event center.

Other larger markets such as Jacksonville, Orlando, St. Petersburg, and Tampa were mentioned as cities where Alachua County residents go for concerts and that are a relatively easy drive from the County. Other Florida markets that were mentioned include Daytona Beach, Pensacola, St. Lucie, and St. Augustine.

Indoor track and field interviewees named the other closest indoor track facilities that are used since the O'Connell Center renovations displaced the indoor track. Birmingham, AL and Winston-Salem, NC were mentioned as other indoor tracks currently used. The in-development indoor track facility in Virginia Beach, VA was also mentioned, which will open in 2020.



# INTERVIEW SUMMARIES (CONT.)



## Support for New Multi-Purpose Event Center

Almost all interviewees were in favor of a new event center of some kind in the County. Many of those interviewed said that there is not much opposition to its development. Several people mentioned that there is a need and a demand for a facility that can host concerts, expos, meetings, sports, and trade shows. Many comments aligned with the sentiment that there is a lack of facilities in the County to host these types of events. Others commented that the potential event center should be flexible enough to host different types and sizes of events.

An individual expressed that people are tired of traveling to Jacksonville and other markets for events. Another person said that a new event center could pick up small trade or expo events from larger markets.

Some feel that there is an excess supply of hotel rooms and retail in Gainesville that could be utilized with a project like the new event center. Some people mentioned that a new facility could have a strong economic impact in the community.



# INTERVIEW SUMMARIES (CONT.)

## Concerns about New Multi-Purpose Event Center

The most common concern voiced by interviewees about the new event center was the potential location of the facility. Many felt the facility should be located conveniently to highways, hotels, retail, and restaurants, so as to maximize it's appeal to tourism events that drive economic impact. Whereas others felt that the facility could be located in an underdeveloped area as a means of driving economic impact to new areas of the County.

Multiple people said that the facility should be accessible to the community, both in terms of scheduling and cost.

Another interviewee questioned if Gainesville would have enough attractions and amenities for the event center to be booked year-round.

An interviewee mentioned that there is some concern that a new facility could compete with the O'Connell Center, and thus it should be designed to be complementary, not competitive.

Some people interviewed said that a concert venue is needed in the County and that they support a facility that can host concerts. Whereas others indicated that Gainesville is a weak concert market and do not see a new facility drawing concerts.



# INTERVIEW SUMMARIES (CONT.)

## Location

Many people interviewed think that the new event center should be in a location with easy access to hotels, retail, and dining options. Several interviewees indicated that anywhere along the highly-trafficked I-75 corridor would be great due to ease of access to these same amenities.

A few people interviewed said that an event center would be used by local groups regardless of where it was built. However, other interviewees felt that the wrong location would hurt the long-term sustainability of the facility, especially as an attraction for out-of-town visitors.

A shared sentiment among many people interviewed is that there is demand to build a new event center on the west side of the County due to existing economic development there, and that the east side of the County does not offer as many amenities and infrastructure support for such a facility. A few interviewees specifically suggested Celebration Pointe as a good location for the potential facility, due to its proximity to hotel, retail, and dining, as well as I-75 access.

The Martin Luther King (MLK) site was another location mentioned by many interviewees. The proximity to Citizens Field was mentioned as both a potential positive and negative attribute by different people. Some said the site is already heavily used and developed, and multiple people mentioned that parking at the site could be an issue. However, one person said a parking garage could help solve parking issues, and another individual mentioned that an event center in this area could provide positive economic opportunities for east-side residents.



# INTERVIEW SUMMARIES (CONT.)



## Location (Cont.)

The Koppers site was also mentioned by interviewees as a potential location for a new event center. Many said they are concerned about the environmental safety of the site. A few interviewees said that the site provides a good opportunity for revitalization. Other people mentioned that the size of this site is favorable for simultaneously providing both development opportunities and open space around the center.



## 4. INTERVIEW SUMMARIES: B. TELEPHONE INTERVIEWS





# TELEPHONE INTERVIEWS



In October 2018, Victus Advisors held telephone interviews with operators, promoters and influencers of sports, entertainment, and trade show/conference events both regionally and nationwide. The topics included ideal amenities, potential events that could be held at the new event center, and other feedback related to the facility. In all, Victus Advisors engaged with 21 individuals from local, regional, and national organizations.

Victus Advisors conducted telephone interviews with representatives from the following groups:

- AAU Florida Gymnastics
- AAU Strength Sports
- Builders Association of North Central Florida
- Firefighter Challenge
- Florida Gun Shows
- Florida High School Athletics Association
- Florida RV Trade Association
- Florida Sports Foundation
- Gainesville Fine Arts Association
- Gainesville Juniors Volleyball
- Gainesville Native American Festival
- Gainesville Regional Airport
- Junior Volleyball Association
- Jimmy Carnes Indoor Track & Field Meet
- Legacy Park Multipurpose Center
- National Association of Intercollegiate Athletics (NAIA)
- Sun Country Sports Center
- Sunshine State Games
- Track & Field
- US Amateur Basketball
- USA Weightlifting



# PHONE INTERVIEW SUMMARIES



- **AAU Florida Gymnastics:**
  - AAU hosts meets across the state of Florida in addition to a state-wide meet every other year. A bidding process is conducted for the group's competitions. The representative indicated that Florida is a hotbed for gymnastics and people are always looking for new sites across the state. A new venue in Gainesville could host large or small gymnastics meets.
- **AAU Strength Sports:**
  - AAU Strength Sports hosts events that include weightlifting, power lifting, and body building. The representative said Florida is a hub for indoor sports. A market like Gainesville could attract and host several smaller health and fitness conventions or other sports tournaments that weightlifting competitions could be a part of. These competitions do not call for the entire floor space of most venues and would sublease their space at other events.
- **Builders Association of North Central Florida (BANCF):**
  - BANCF is a trade organization that holds monthly networking meetings and an annual end-of-the-year meeting in Gainesville. They have previously used hotels and the University of Florida for their meetings. The representative from BANCF indicated that they want lower prices and more flexibility in their meeting spaces than what hotels currently offer. Because their monthly meetings are over lunch, a centrally-located venue near I-75 is most convenient for them and their members. BANCF would also like to see an event center with adequate parking and an all-inclusive price as opposed to extra fees. If the price were lower than their current venues, BANCF could consider moving some or all of their meetings to the new event center.



# PHONE INTERVIEW SUMMARIES (CONT.)



- **Firefighter Challenge:**
  - The Firefighter Challenge is an event that showcases firefighter skill competitions. The group needs at least a 200' x 300' space and room for their five-story structure used in competitions. Because of these requirements, the events are held outdoors and typically do not work in indoor facilities. The group has previously expressed interest in the project depending on if the parking lot were designed in a way to meet their event requirements.
- **Florida Gun Shows:**
  - Florida Gun Shows hosts weekend gun shows across the state of Florida. The company typically utilizes convention centers or fair grounds with floor space between 30,000 and 50,000 square feet with adequate parking. On average, their events draw around 5,000 attendees with most living within 40 miles of the host site. The company representative said that Gainesville is a place they could host between three and four shows annually.
- **Florida High School Athletics Association (FHSAA):**
  - FHSAA hosts indoor state championships for basketball (boys and girls), competitive cheer, volleyball (boys and girls), weightlifting, and wrestling. The organization said that a host site typically will not host more than one or two state championships per year. FHSAA is headquartered in Gainesville and has worked with the Gainesville Sports Commission on past events. A venue in Gainesville has adequate parking and seating around a marquee court could host a state high school championship in an indoor sport annually.



# PHONE INTERVIEW SUMMARIES (CONT.)



- **Florida RV Trade Association (FRVTA):**
  - FRVTA assists regional chapters in hosting RV shows throughout the state of Florida. These shows are held in large, open spaces outdoors. These sites are sometimes difficult to find or expensive nearer to large population centers. Parking lots and fairgrounds are some venues the group typically uses. An event center would not fit their needs unless the parking footprint for the new event center was adequate for their shows. The RV shows also have geographic limitations imposed by RV manufacturers that could potentially hinder a new location from being used.
- **Florida Sports Foundation:**
  - The Foundation works to assist Florida's communities with securing, hosting and retaining sporting events and sports-related business that generate significant economic impact and tourism. The group was involved with the basketball championships for the Sunshine State Games held in Alachua County. A facility with multiple basketball courts would be ideal for hosting more tournament activity.
- **Gainesville Fine Arts Association (GFAA):**
  - A member of the GFAA indicated that the organization is looking for a new host for an annual local art show. The group has previously used Tioga Town Center as the site for this show, but can no longer use this venue. The group desires an open space, preferably indoor. Easy and convenient access for artists to bring in displays is essential for any space they use.



# PHONE INTERVIEW SUMMARIES (CONT.)

- **Gainesville Juniors Volleyball:**
  - The local volleyball club has been leasing their currently 20,000 square foot facility for the past seven years. The representative stated that there is a lack of space to run a high-level volleyball tournament in Gainesville. The group has been in contact with the Sports Commission about being a partner in the proposed facility. The group representative said that an eight-court facility would meet his club's needs as well as provide the opportunity to host three to four mid-sized volleyball tournaments annually.
- **Gainesville Native American Festival:**
  - The event will be held in Gainesville for the first time in March 2019. The fairgrounds will be the site of the festival. The same group has done a similar event for the past six years in Brooksville. The group is mostly interested in an outdoor space to hold its festival with plenty of parking, a pavilion space, and RV hookups. The typical attendance for the Brooksville event is between 7,000 and 8,000 with an estimated 40% of people coming from beyond 50 miles of Brooksville.
- **Gainesville Regional Airport:**
  - A representative from the Gainesville Airport has expressed interest in potentially partnering with the County on this project. The airport is in a position to add a new parking structure and thinks that the structure could possibly be shared with a new event center if it were built adjacent to the airport. There is an availability of land near the airport and possible state funds that could be used towards the joint project.



# PHONE INTERVIEW SUMMARIES (CONT.)



- **Junior Volleyball Association (JVA):**
  - JVA has spoken to representatives from Gainesville and the Central Florida Sports commission about bringing volleyball tournaments to the southeast. JVA has competitors that use Orlando venues to host tournaments. They are looking for a venue with 30-40 courts under one roof, but could use less courts to host smaller tournaments. They also look for good hotel and sports commission partners as well as other family entertainment options in a host city.
- **Jimmy Carnes Indoor Track & Field Meet:**
  - A local representative involved with the meet spoke to Victus. The indoor meet was discontinued after the O'Connell Center renovations. The Meet would take place over five weekends at a new event center. The representative indicated that an indoor banked track could host not only the Jimmy Carnes meet, but possibly three collegiate and two other youth meets during the year. The individual also expressed the desire for seating (flexible or permanent), space for team tents, and a dedicated person to be in charge of the facility.
- **Legacy Park Multipurpose Center:**
  - A representative from the City of Alachua who works with the Multipurpose Center was interviewed. The representative indicated that the purpose of Legacy Park is to serve the citizens of the City of Alachua and that the other events held there are secondary to that main objective. Legacy Park and the proposed event center have different purposes. Others have indicated that the two facilities could complement each other and allow for larger sporting events to be held in the area.



# PHONE INTERVIEW SUMMARIES (CONT.)

- **National Association of Intercollegiate Athletics (NAIA):**
  - The NAIA holds an annual national championship in indoor track and field. This event is currently held in Brookings, SD, and has been previously held in Pittsburgh, KS. The championships draw 100 men's and 100 women's teams from around the country, totaling around 1,110 participants and 3,000 spectators. The group is looking for a long-term home for its indoor track and field championships. The first priority is quality facilities including a 6-lane (8-lane straightaway) track that is preferably banked. There are other facility requirements including warm-up space, digital scoreboard, PA system, and locker rooms. The NAIA would look into a quality facility if it were built in Gainesville. The NAIA's Sun Conference is headquartered in Daytona Beach, FL and could also use the facility for its conference indoor track championships.
- **Sun Country Sports Center:**
  - Sun Country Sports Center is a multi-sport recreation facility that hosts gymnastics, rock climbing, swimming, and cheer classes and events. The facility is looking for a venue to host up to three gymnastics meets per year. They have previously used local high school gyms but have recently outgrown those venues and moved to the Legacy Multi-Purpose Center. Some amenities that the group is looking for include seating for over 300 spectators, adequate floor space, ability to truck equipment in and out, break out/hospitality rooms, and a separate space for awards presentation. The group would move to the proposed event center if it also met their budgetary constraints.





# PHONE INTERVIEW SUMMARIES (CONT.)



- **Sunshine State Games:**
  - A representative familiar with the Sunshine State Games and other basketball tournaments as a tournament director was interviewed. A facility that has four courts (ideally wood floors for high school and elite levels) would allow for some tournament activity. The courts at the Legacy Center could be used in conjunction with the new facility for larger tournaments. Gainesville has a natural draw for youth tournaments with the University of Florida nearby. The representative said that if the event center could host three to five tournaments of varying sizes each year.
- **Track & Field:**
  - An individual heavily involved with track and field in the Gainesville area was interviewed. The individual has previously been involved with Jimmy Carnes and other competitions. A facility with a banked track with seating for between 4,000 - 6,000 would rival other facilities and be a draw for top track talent in the state and region. Several university teams and elite runners currently travel far away to use other indoor track facilities. A hydraulic track would be ideal so that a flat track could be used outside of competitions.



# PHONE INTERVIEW SUMMARIES (CONT.)



- **US Amateur Basketball:**
  - The group has previously used Gainesville for national tournaments. The representative said that if a multi-court facility (more than four courts) were built in Gainesville, they would use it. They had success while using the courts at the Legacy Park last year. US Amateur Basketball worked with the Gainesville Sports Commission on this event. The group said that a new multi-court facility in the area could host some local basketball tournaments as well as some larger events if the number of courts and price to rent the courts was reasonable. US Amateur Basketball wants to hold events in Gainesville in the future.
- **USA Weightlifting:**
  - The governing body requires venues to have seating for 600-1,000 spectators, adequate ceiling height, and 20,000-30,000 sq. ft. of space to host its national events. The group has previously used the O'Connell Center for a national event. The group enjoyed Gainesville as a host site but many found it difficult to travel to from across the country.



## 5. SITE OPTIONS ANALYSIS

**Victus Advisors** was tasked with analyzing the market viability of three (3) potential locations for the event center, as defined by the County. Victus Advisors toured the potential sites, researched the ownership and other such factors for each site, and met with County and City of Gainesville staff, local developers, and other potential project stakeholders, which includes the following sites:



Source: Google Maps

## Potential Sites



Koppers Site



MLK Site



North Waldo Road Sites  
(Tacachale Center Site or Alachua  
County Fairgrounds Site)



# SITE SCORING CRITERIA



Each potential site in Alachua County was assessed and scored by Victus Advisors based upon the following general factors:

## 1. Site Factors:

- Do the site characteristics meet the requirements for the facility? (i.e. parcel size, site dimension, opportunities for additional development, etc.).
- Acquisition cost, demolition cost, and any on-site and off-site cost that might impact the development of the facility.
- Parking availability, access, and traffic impacts.

## 2. Economic & Hospitality Factors:

- Does the site have adjacent and/or nearby restaurants, retail, and hotels to provide a tourism-friendly environment and encourage repeat visitation?
- Are the adjacent/nearby property uses (neighborhoods, other commercial or public uses, etc.) compatible?
- Is the site conveniently located off an interstate highway exit for ease of regional travel access?



# SITE SCORING MATRIX



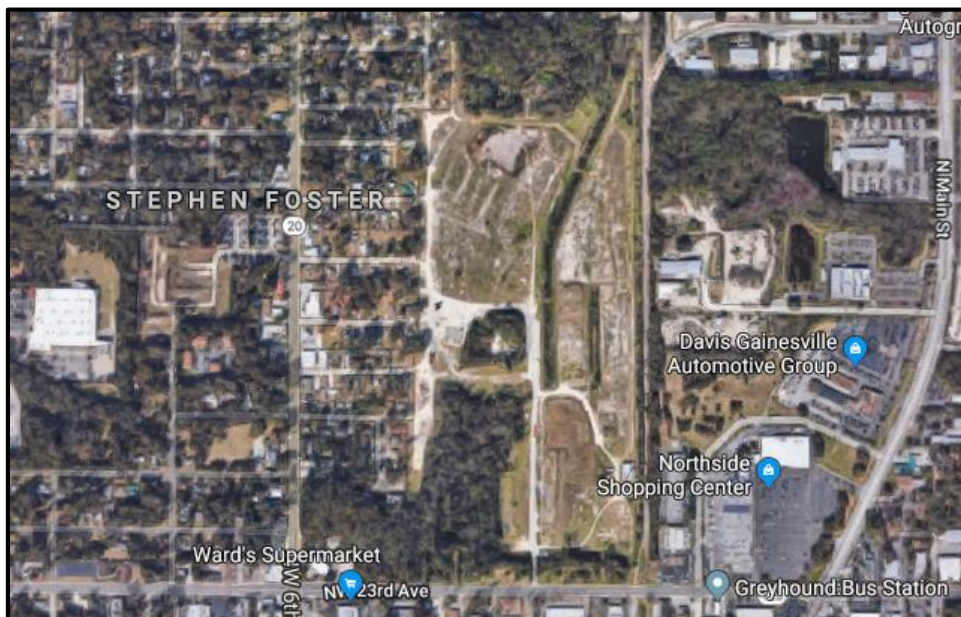
**Scoring Methodology:** Victus Advisors assigns a score of Above Average (3), Satisfactory (2), Below Average (1) for each criteria. High scores are assigned to the most suitable site and low scores assigned to the least suitable, based on each factor.

**Percentage Score:** A percentage score is calculated for each site, based upon total score awarded and total points available. Generally speaking, a percentage score of 50% represents a site that would not be recommended, 50-75% represent a potentially suitable site, and greater than 75% represent a highly recommended sites.

	Site A 200 NW 23rd Ave (Koppers Site)	Site B 1400 NE 8th Ave (MLK Site)	Site C 3100 NE 39th Ave & 1621 NE Waldo Rd (North Waldo Road Sites)
<b>Site Specifics</b>			
Site size and configuration/ability to accommodate building program	3	1	2
Ability to accommodate additional commercial development on-site	3	1	2
On-site parking opportunities	3	1	2
Environmental considerations, demolition/relocation, and other costs	1	2	2
<b>Economic &amp; Hospitality Factors</b>			
Presence of on-site/adjacent commercial development (hotel, retail, restaurants, etc.)	1	1	1
Presence of commercial development within 5-minute drive	2	2	1
Compatibility of adacent property uses	2	2	1
Convenient highway access	1	1	1
<b>TOTAL SCORE</b>	16	11	12
<b>TOTAL POINTS AVAILABLE</b>	24	24	24
<b>PERCENTAGE SCORE</b>	67%	46%	50%

# KOPPERS SITE

RANK: 1    SCORE: 67%



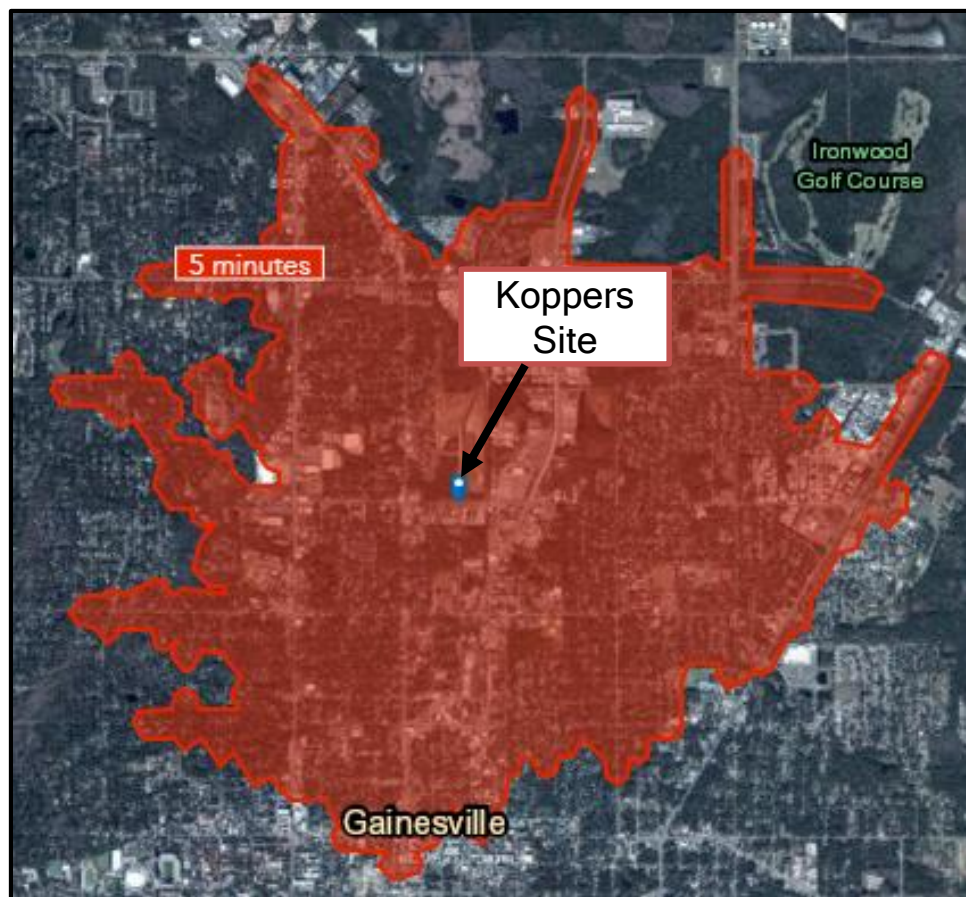
*Source: Google Maps*

**POSITIVES:** The site has considerable revitalization potential from an urban planning standpoint and has potential to be a “connector” between existing urban development projects, such as potential opportunities for developing a live-work-play corridor within the Gainesville urban core. Lastly, the site is much larger than the other sites analyzed, which allows for other development opportunities, creation of open space, etc. Neighbors have a positive attitude towards site development.

**NEGATIVES:** There is public concern about major contamination risks and the Environmental Protection Agency is starting remediations on the site. The site is also privately owned which could increase acquisition costs for the County.



# KOPPERS SITE (CONT.)



Source: Esri

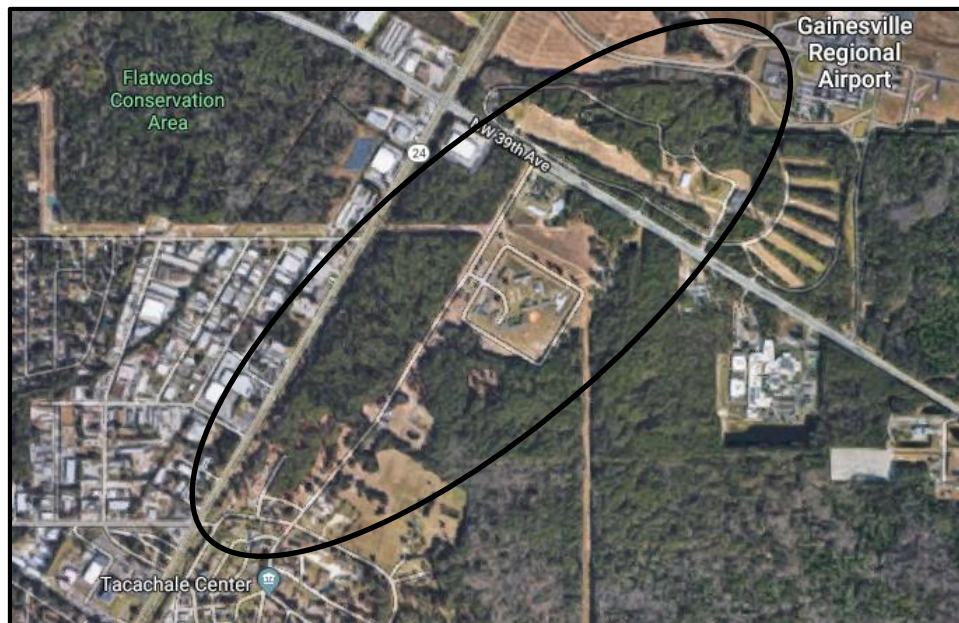
**RETAIL:** Shopping within a 5-minute drive-time radius of the Koppers Site is highlighted by the Gainesville Plaza, Gainesville Shopping Center, and a Walmart Supercenter.

**DINING:** Dining within a 5-minute drive-time radius of the Koppers Site is highlighted by small local chains and quick service restaurants which are near major retail centers.

**LODGING:** There are six hotels within a 5-minute drive-time radius of the Koppers Site. All are either off NW 13<sup>th</sup> St or University Avenue.

# NORTH WALDO ROAD SITES

RANK: 2    SCORE: 50%

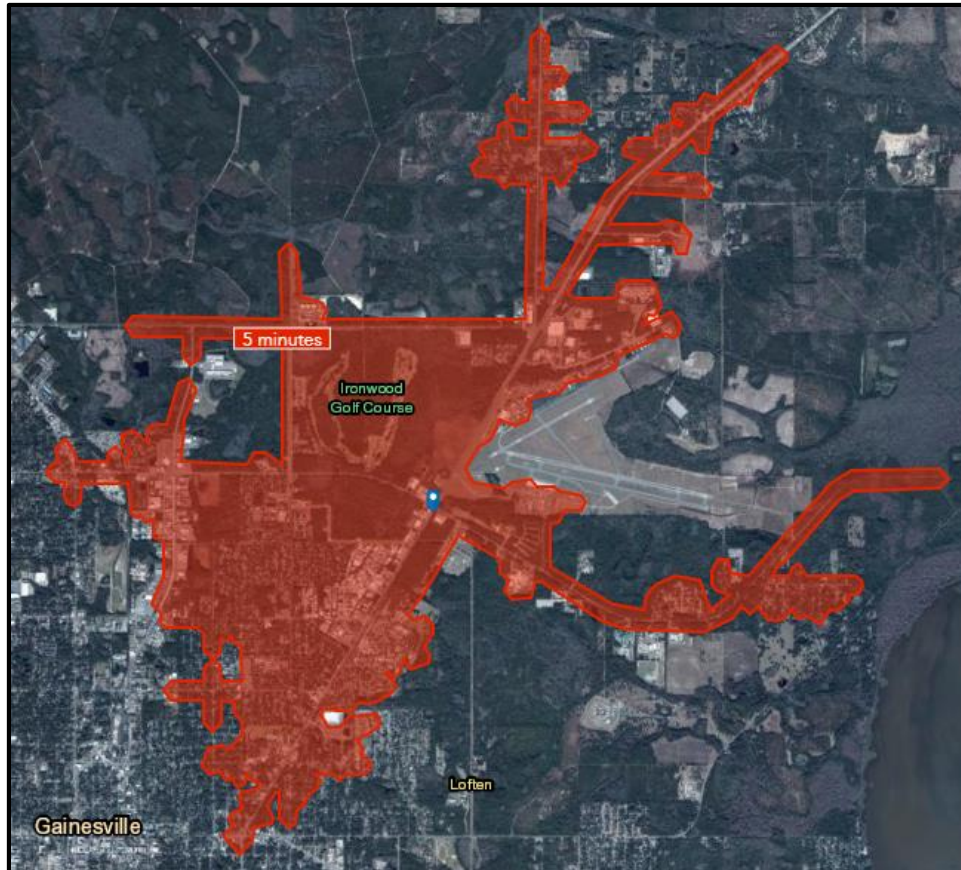


*Source: Google Maps*

**POSITIVES:** Both sites have plenty of land to build a facility and have ample parking.

**NEGATIVES:** Both sites are relatively far from the City core, and ancillary development on-site/adjacent to the event center would be a vital component for both overall sustainability and capturing economic impact. Stakeholders mentioned that the Alachua County Fairgrounds site oftentimes has a foul smell due to nearby landfill. Lastly, both sites are near the County jail, juvenile detention facilities, and a mental institution, which are not typically compatible uses with a tourism and hospitality driven event center. The proximity of a tourism driver venue to these types of facilities could negatively affect return visitation.

# NORTH WALDO ROAD SITES (CONT.)



Source: Esri

**RETAIL:** Shopping within a 5-minute drive-time radius of the North Waldo Road Sites is highlighted by the Gainesville Shopping Center, and a Walmart Supercenter.

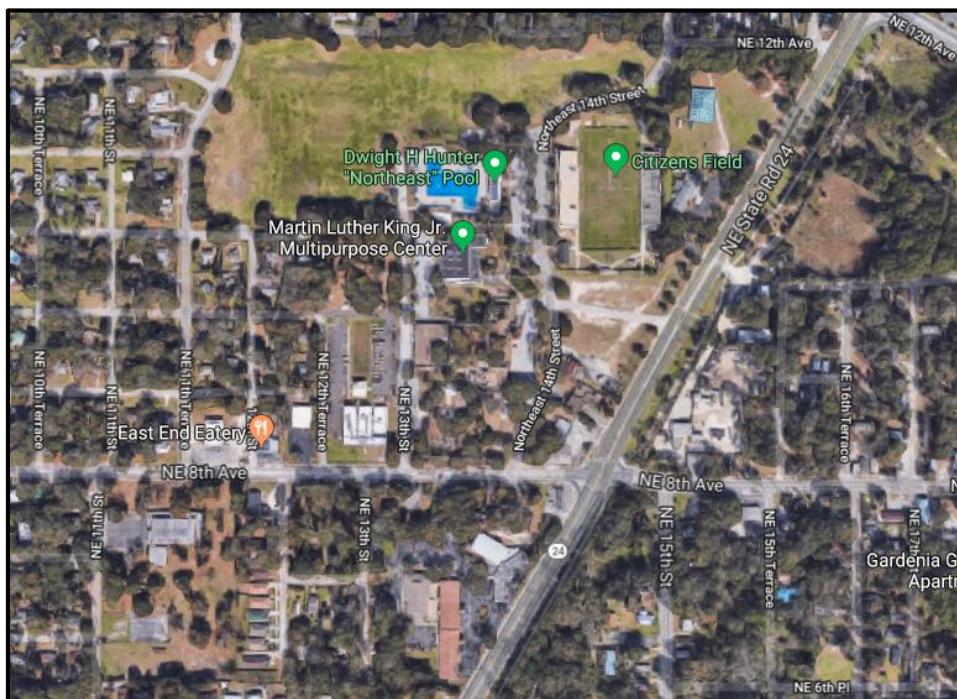
**DINING:** Dining within a 5-minute drive-time radius of the North Waldo Road Sites is highlighted by a local BBQ chain southeast of the site and several local and national chains southwest of the site off University Avenue.

**LODGING:** There are only two hotels within a 5-minute drive-time radius of the North Waldo Road Sites. Both are off University Avenue.



# MLK SITE

**RANK: 3    SCORE: 46%**

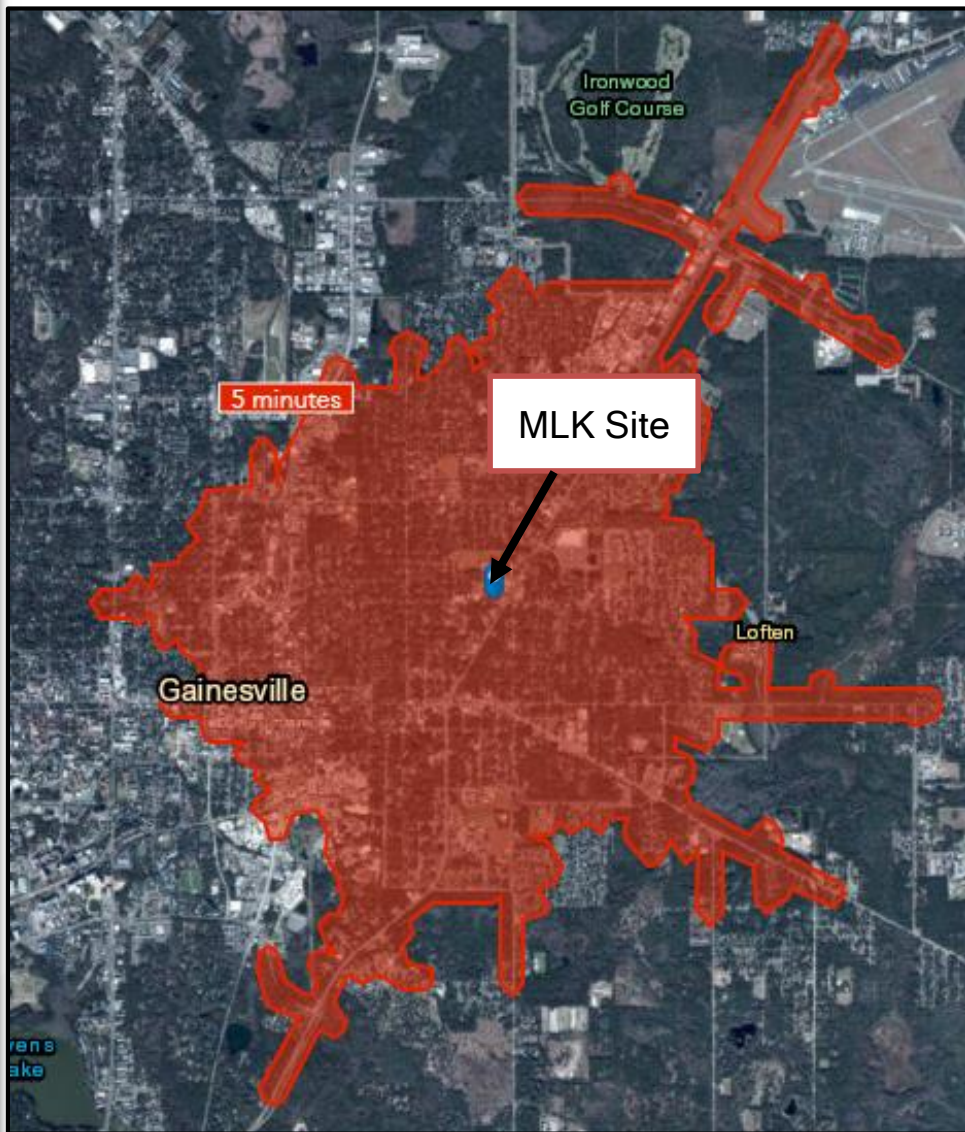


*Source: Google Maps*

**POSITIVES:** The site already has an existing facility in Citizens Field, which already has a significant amount of daily use with high school football games and other events. Additionally the site is already zoned properly for a multi-purpose event center. The City of Gainesville could have significant amount of money to contribute towards project from this site.

**NEGATIVES:** The whole site is only 10-15 acres. A potential event center would most likely be upwards of 100,000 sq. ft. which would be difficult to fit on the site, let alone the need for on-site parking. Additionally, there is concern that neighborhood residents could be negatively impacted due to parking challenges, increased traffic/noise, and land assembly.

# MLK SITE (CONT.)



**RETAIL:** Shopping within a 5-minute drive-time radius of the MLK Site is highlighted by the Gainesville Shopping Center, and a Walmart Supercenter.

**DINING:** Dining within a 5-minute drive-time radius of the MLK Site is highlighted by a local BBQ chain northeast of the site and several local and national chains southwest of the site off University Avenue.

**LODGING:** There are about 10 hotels within a 5-minute drive-time radius of the MLK Site. However all are either off University Avenue or further south.



## 6. PROGRAM DEMAND ANALYSIS & FACILITY RECOMMENDATIONS



# OVERVIEW



Our program demand analysis and facility recommendations are based primarily upon the following primary and secondary research conducted by Victus Advisors over the course of this study:

- Analysis of Alachua County's unique market characteristics.
- Review of comparative markets.
- Community feedback via interviews.
- Interviews conducted with event organizers and operators.

The primary goals of our study have been to estimate market demand for a new multi-purpose event center and determine if the potential success of the facility is dependent on the facility's location within the County.





# BUILDING PROGRAM RECOMMENDATIONS



**SIZE OF FACILITY** - Victus Advisors reviewed Alachua County's preliminary facility concepts for an approximately 92,000 square foot multi-purpose event center. Based upon Victus Advisors' research, and our team's industry experience with similar facilities, it is likely that the proposed facility would have to be somewhat larger in order to accommodate the types of programming Alachua County would like to attract. Enhanced restroom and food/beverage facilities would be necessary to support larger events. Additionally, as a multi-purpose venue, significant storage space would be required for storing special purpose flooring and mats for various event types. Finally, sufficient space would need to be provided for the indoor track to be functional while the retractable seats were opened, as many track and field events require seating for at least 3,000 spectators.

**VENUE PROGRAMMING** - The venue should be multi-purpose and maximize daily use (when not in 3,000-seat arena event configuration) by featuring retractable seating in order to accommodate a wide variety of potential uses. The recommended programming should include: indoor track and field; high school and youth/amateur basketball, volleyball, gymnastics, cheer, and wrestling; flat floor and consumer shows (i.e. conferences, home & garden shows, and other events that utilize a non-carpeted/concrete floor). Victus Advisors also believes that a significant number of regional and national youth/amateur sports tournaments could be held at a new event center in Alachua County, which would help maximize the potential economic impacts by drawing families for overnight visits. These types of events typically require space for at least eight (8) basketball or volleyball courts.

**FLAT FLOOR SPACE** - A typical event center floor (without retractable seating) has approximately 17,000 sq. ft. of concrete floor space, however the use of retractable seating systems could expand the available floor space to 30,000 sq. ft. or more. It is estimated that 30,000 sq. ft. of event floor space could accommodate as many as 150 ten-by-ten foot booths for trade show-type events.



# BUILDING PROGRAM RECOMMENDATIONS (CONT.)



**SEATING CAPACITY** - The preferred maximum seating capacity for the new facility should be a minimum of 3,000 seats in indoor track configuration. Additionally the seats should be retractable to maximize floor space utilization for events that don't require bleacher seating. The minimum seating recommendation would ensure that the multi-purpose event center complies with NCAA and NAIA requirements for hosting indoor track and field events.

**PARKING** - An event center typically requires at least one available parking spot within walking distance for every three attendees. For example, it is estimated that 3,000 event attendees could require nearly 1,000 total parking spots within a 10-minute walk. In addition, up to 150 of on-site parking spots should be provided for VIP customers, customers with disabilities, and staff. In terms of best practices for economic development, there should be a minimum amount of parking attached directly to the facility (such as via connected parking garage). Dispersing parking throughout an adjacent walkable area with restaurant/retail options will encourage attendees to interact with local businesses and drive economic impact.

**OTHER EVENT CENTER COMPONENTS** - At least one (1) concessions point of sale for every 250 seats, at least one (1) toilet stall per 50 seats, and one (1) urinal per 100 seats. At least two (2) full-sized locker rooms for sports use, and at least four (4) additional dressing rooms for use by officials, performers, etc. Other features could include video scoreboard, digital/LED signage, A/V and lighting equipment, storage and marshalling areas, rigging grid and stage capabilities, box office, office space for event center personnel, etc.



# BUILDING PROGRAM RECOMMENDATIONS (CONT.)



**INDOOR TRACK** - With a banked track and the use of portable sports flooring, multi-use (non-track) events could also be programmed year-round to provide additional space for events utilizing the primary sports center facility (e.g. basketball, volleyball, etc.).

A flat track (non-banking) would significantly limit the ability of the venue to host larger regional meets and college track events. A flat track would primarily be a local use amenity.

The typical season for smaller indoor track and field meets would be from December to February, culminating in larger regional and national events, including NCAA and NAIA championships in late February and early March. Peak track and field usage for the facility in Alachua County, with a focus on hosting larger regional/national championships that drive overnight visitation, would likely be in February/March.

In regards to potential overlapping of track and field events with volleyball and basketball tournaments, Victus Advisors found that the majority of boys and girls basketball/volleyball tournaments are not typically held in February/March. Victus Advisors also found the same typical schedule for volleyball tournaments.



# MULTI-PURPOSE EVENT CENTER



## Facility Recommendation:

- Alachua County community should consider the development of a multi-purpose event center that could be a tourism driver for amateur and youth sports events in addition to meetings, conferences, and expos. Based upon the results of our market and facility analysis, Victus Advisors recommends that a new multi-purpose event center in Alachua County should have:
  - ☐ Up to eight (8) basketball courts, which should be convertible to eight (8) or more volleyball courts.
  - ☐ The same floor space used by basketball, volleyball, and other sports should be adaptable for conference, expos, and meetings.
  - ☐ A removal banked track that could accommodate competitive indoor track events at the youth and collegiate level.
  - ☐ Support areas and amenities, including lobby, concessions, team rooms, offices, mechanical/electrical rooms, storage, circulation, etc.
  - ☐ Bleacher seating for at least 3,000 people to fulfill minimum NCAA/NAIA requirement.
  - ☐ Modern amenities such as wireless internet capabilities and flexible space configurations.

## Rationale:

- Victus found that large multi-court facilities and indoor track facilities are significantly lacking in Alachua County. A multi-purpose event center would capture lost and future events that are not able to use the O'Connell Center, as well as larger sports and trade/expo events than current venues in the County can accommodate.

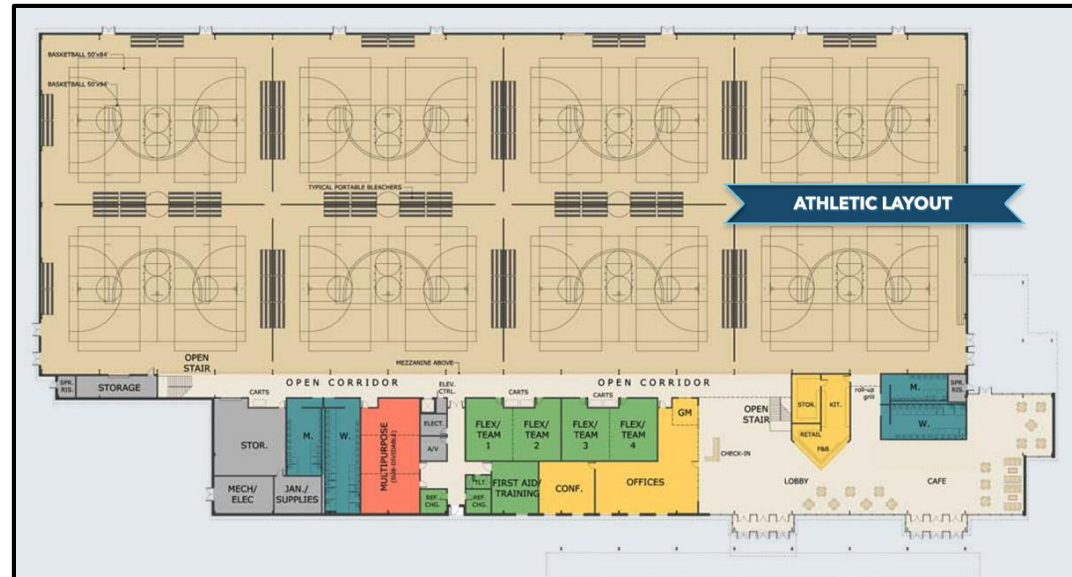
# POTENTIAL COMPARABLE FACILITY MODEL

The Myrtle Beach Sports Center is approximately 100,000 square feet in total. It was built in 2015 for approximately \$12.4 million in building costs (prior to any site/acquisition costs).

As a sports venue, it was designed so that eight (8) basketball courts could also be utilized as 16 volleyball courts (i.e. two volleyball courts per basketball court).

The facility can also be converted to approximately 70,000 sq. ft. of column free space for conventions, expos, and trade shows.

For events requiring a larger spectator capacity, portable bleacher systems can be brought in for temporary use. However, it should be noted that the facility does not have retractable seating capacity or an indoor track, two components that could add significant cost in Alachua County.





# CONTACT INFORMATION



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