



**Visit Mississippi Gulf Coast  
Sports Tourism Strategic Planning Project  
Executive Summary  
March 28, 2016**

## **Visit Mississippi Gulf Coast Sports Marketing Project – SWOT Analysis**

It is the opinion of the Huddle Up Group (“Consultant”) that a tremendous opportunity exists to continue in the expansion of the sports tourism work of Visit Mississippi Gulf Coast (“VMGC”). Through our many phone interviews, conversations with several national and local events rights holders, and our knowledge of both the Mississippi Gulf Coast and national marketplace, we believe the tools exist to enhance the area’s venue offering as well as it’s sports marketing efforts. This would lead to increased economic development, and will positively impact the region’s sports tourism efforts over time. In a market the size of the Mississippi Gulf Coast, it is critical that grass roots sports tourism continue to be a top priority. Below is a SWOT analysis constructed by the Huddle Up Group. Each SWOT item features, in most cases, three key issues with no more than three action items for each (“Powers of Three”).

### **Strengths**

1. Leadership – Mississippi Gulf Coast has an excellent mix of staff resources and community leaders to continue its growth within the national sports tourism and events marketplace. The executive team has the support of community leaders in the region and the sports staff, while new, has the event execution experience to be a great asset going forward. In addition, community stakeholders are nearly unanimous in their support of an expanded effort in this space. Further, there are sport and event leaders in the area that also have regional/national reach that can help drive ancillary business (examples: MGM Resorts, Steve Nieman). In addition, there is a solid foundation of local promoters that can build locally owned events (examples: Gulf Coast Winter Classic, promoters that feed into the Gulfport Sports Complex, Russ Bloom and the Mississippi Gulf Coast Golf Association). The key for VMGC will be to find ways to continue to partner with, and enhance the existing efforts of, these sports event leaders.
2. Attractions – The Gulf Coast has a great supply of family friendly attractions that can serve as an excellent backdrop to host youth oriented sports groups and events. Numerous affordable options are available including the outdoor water park, fishing and wildlife options, Jones Park, and of course the beaches lining the Gulf itself. The future development of the new indoor water park and aquarium facilities in Biloxi will only strengthen the attraction offerings in the region. In addition, the area’s casinos offer adult friendly alternatives for masters and senior age group tournaments and events.
3. Existing Venues (Part I) – The Gulf Coast region has a plethora of grass roots sports venues to offer tournament organizers. The collective field count at the sports complexes and fairgrounds along the I-10 corridor (including Biloxi, Ocean Springs, Gulfport, D’Iberville, Hancock County, Harrison County, St. Martin, and Vancleave) offer the community the ability to host large national level tournaments (see Appendix D).

4. Established Events – There are numerous examples of successful annual events that take place in the Mississippi Gulf Coast region. Events such as the PGA Champions Tour stop, the Gulf Coast Winter Classic, Cruisin' the Coast, and the Coliseum Crawfish Festival provide VMGC a solid platform from which to build a full 52-week tourism calendar (which could be branded "Events 52" as a working concept).

#### Weaknesses

1. Existing Venues (Part II) – Several issues regarding the use of the area's current venues for regional and national tournaments exist in Mississippi Gulf Coast including, but not limited to, the following: (1) Minimal supporting infrastructure at some of the area's key venues, (2) date/calendar accessibility, and (3) lack of indoor venue inventory beyond the Convention Center.
2. Messaging Market Impact – The sports market offers a significant economic benefit to the Mississippi Gulf Coast community. Stakeholders interviewed identified that sports indeed offered value to the region, however, they were largely unsure how much. Events hosted in the Gulf Coast drive a significant number of hotel room nights (25,000+ annually) and its ancillary economic impact. VMGC must lead the charge in regularly trumpeting the economic impact of the events held in the area to the community and the stakeholders of VMGC. In addition to fiscal impacts, there are other benefits of hosting sporting events that are not room night based, such as media exposure through television coverage, youth activities, and community enrichment (quality of life).
3. Air Transportation – While the Gulf Coast region is uniquely situated along I-10 with several large markets within driving distance, the limited air lift provides challenges to hosting major events in the future. With a small number of direct flights into the area, VMGC's opportunity is to continue to facilitate venue improvements, and to incubate locally created events in order to capitalize on the regional drive market.

#### Opportunities

1. Collaboration – There is great opportunity in the Mississippi Gulf Coast to build a larger community-wide focus on sports marketing and as a result, generate an increase in sports tourism. Specifically, opportunities exist in the following areas: (1) Education on the impact of sports tourism, (2) increased stakeholder engagement, and (3) expanded partnerships with area event and venue leaders.
2. Events – Significant strides can be made in the area of locally run events, including activation on the following opportunity: Support area event promoters to grow their existing events and also to create new tourism-driving inventory.
3. Strengthening the Organizational Structure – Sports tourism marketing is different from

the sales process on the convention side of the tourism industry. Sports groups not only need room blocks and attraction information, but they require a different level of service than group meetings. In addition, sports groups have their own terminology. Communities that understand the needs of sports groups and provide specialized support “outside the lines” have proven to be the most successful in this market. The new sports staff at VMGC has extensive event operations background, which will prove to be a stronghold for the VMGC going forward.

4. Funding – Any future infusion of funds (examples: BP, Restoration Funding, Governor’s allocation) will serve as a great opportunity for the region to recreate itself in the sports tourism space. The combination of land availability near the Gulf, the need for the community to have connectivity from the Convention Center outward, and the lack of a game changing plan for some of the available funding sources, together provide the Gulf Coast region a tremendous opportunity.

### Threats

1. Politics – As is the case in numerous destinations, there seems to be division between some government leaders on how to tackle the topics of sports venue development and overall tourism. The newly formed tri-county effort (VMGC) is a step in the right direction. It will be incumbent upon VMGC’s leadership to continue garnering community-wide support not just for sports tourism, but tourism as a whole.
2. Altering Course – It is the opinion of the Consultant that the current “blended” structure that is employed by VMGC in the area of sports tourism is the correct model for the organization going forward. Launching a stand-alone sports commission in a market the size of the Mississippi Gulf Coast, without a significant corporate presence, would put the sports effort at great risk. The current funding mechanism (bed tax collections) used to grow the area’s sports tourism efforts is the most sustainable and sensible model currently available to VMGC.
3. Community Engagement – Tourism is the second largest economic driver for the Gulf Coast region, trailing only government. Studies show that tourism in the area was responsible for more than \$1.8 billion in economic impact in 2015, and accounts for more than one third of the State of Mississippi’s tourism revenues annually. The tourism industry is the number one employer in the Gulf Coast region. Tourism jobs account for 22% of the area’s workforce and is growing faster than any industry. During this study, there were indications that some community stakeholders were disconnected from the work of the area’s tourism leaders. With that in mind, it is incumbent on VMGC and its board to consistently engage the community at all levels (citizens, elected officials, hospitality leaders, sports venue managers, etc.) to illustrate the value of tourism to the region and to build relationships for long-term success.



## **SWOT Summary**

In the opinion of the Consultant, the Mississippi Gulf Coast has a significant opportunity to capture a larger piece of the nation's sports tourism pie. By expanding this community-wide sports tourism effort, the Mississippi Gulf Coast will realize increased economic activity for the region. The opportunity at hand is for VMGC (and the community) to expand into a more broadly reaching sports marketing mantra, and to create a venue mix that will rival its peer group nationally. The current staff at VMGC is well equipped to increase its efforts, and in turn, to build a stronger annual sporting event calendar for the Gulf Coast.

Prior sports sales efforts in the region have delivered solid results. The unified tri-county effort offers VMGC the opportunity to further enhance the impact of sports tourism going forward. In the sports tourism and events marketplace, many communities have had success through a basic sales and marketing plan and an undifferentiating venue mix. For a community to "keep up with the Joneses" in this space, one would normally attend a few of the major sports tourism conferences, hand out informational brochures, make follow-up phone calls, and field every RFP that hits their inbox. This reactive type of game plan is the most widely accepted way to play in this space. It is also often times the most ineffective and misguided use of the limited resources a community has available to them. With that in mind, VMGC needs to employ laser-like focus of its resources on specific niche audiences in order to have the most desirable impact on the region.

The Consultant believes the Mississippi Gulf Coast has the human and financial capital to sell itself against its competitive set and provide even greater financial impact to the community. By engaging the community and various funding sources in a way that will enrich the area's venue offering, VMGC will enhance community ROI in this expanded sports tourism market.

By strategically engaging the community's leaders, continuing to bid on and host national events, and by empowering local promoters to incubate new events, Mississippi Gulf Coast will build a strong environment for hosting tournaments. It is also critical that VMGC not only deliver on the recommendations set forth here, but also to create opportunities to draw the community together (examples: enable local promoters to grow their events and to create new ones, educate area civic groups and leaders on the value of sports and events tourism along the Mississippi Gulf Coast). The perception must be that Visit Mississippi Gulf Coast is leading a sports tourism marketing drive that is inclusive of all stakeholders in the region, and is enriching the area in a meaningful way.

## **Visit Mississippi Gulf Coast Sports Marketing Project – Synopsis and Recommendations**

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

Add to this industry growth, the increase in popularity of soccer\*, lacrosse, and additional emerging sports (examples: BMX, quidditch, rugby, and ultimate), the opportunity for the continuing expansion of economic development through sports tourism is tangible.

Throughout the personal interview process, it became apparent to the Consultant that there is great opportunity for Mississippi Gulf Coast to increase its footprint in the sports tourism marketplace. The key moving forward is for community stakeholders to work together in building and managing an expanded sports tourism program, and by creating a venue mix that can compete within VMGC's peer group. This unified effort will drive economic development to the Gulf Coast region on a recurring basis from one year to the next. Through the execution of a strategic and targeted game plan, the Mississippi Gulf Coast will cement its position nationally as a leader in the sports tourism and events industry.

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

### **Methodology**

The Huddle Up Group, LLC ("Consultant") conducted an audit on the current sports tourism work of Visit Mississippi Gulf Coast ("VMGC"). The audit included in-person meetings with multiple community groups and phone interviews with more than 20 key stakeholders, including the VMGC staff, community leaders, venue managers, team executives, event owners, and additional targets that were identified by VMGC. The audit also included 17 sports venue site visits and a hotel tour. In addition, the Consultant team reviewed numerous VMGC internal documents, the GO COAST 2020 report, a 2010 study by Conventions Sports & Leisure International ("CSL"), as well as the Restore Act Funds model.

The audit was led by Huddle Up Group Founder + CEO, Jon Schmieder, and Huddle Up Group Principal, Gary Alexander. The audit was focused on three themes: (1) national best practices for sports tourism and events within a similar organizational structure, (2) identification of new business opportunities, and (3) recommendations for future venue enhancements. Discussions were held around national best practices in the three theme areas and focus was given to applications for VMGC. The intent of this process was to create community support for VMGC's increased sports tourism and event enrichment effort by giving local stakeholders a voice, to foster a teamwork mentality for the Mississippi Gulf Coast, and for VMGC to be perceived as the leader of this united effort.

The Consultant took the results from the phone and in-person interviews then overlaid national best practices to develop and deliver the enclosed recommendations. These recommendations are intended to spark a dialog within the Mississippi Gulf Coast leadership hierarchy. The goal is to build a framework for next steps on an expanded sports and events marketing program, and provide a platform for a venue development/enhancement plan. The enclosed game plan includes recommendations for five (5) primary focus areas and two (2) secondary concepts for future consideration.

#### Primary Recommendation Areas

1. Internal Organizational Structure
2. External Organizational Structure
3. Messaging and Marketing Platforms
4. Booking Concepts/Empowering Promoters
5. Venue Enrichment/Development

#### Secondary Recommendation Areas

1. Created/Owned Events
2. Adding Special Events/Expanding Services

### **Primary Recommendations**

#### Primary Recommendation #1: Internal Organizational Structure

There is great opportunity for VMGC to increase its national presence in the sports tourism space. In order to expand the organization's impact in a meaningful way, the Consultant recommends the following action items aimed to strengthen the foundation of VMGC's growing sports effort.

1. Staff Roles – The current staff at VMGC has the skills and knowledge to drive significant room nights to the area each year. Servicing meeting groups is vastly different than the requirements for supporting sporting events. Sports groups require several execution

elements that a meeting normally would not, such as volunteer recruitment and support, media assistance, sponsorship facilitation, team and VIP transportation, reception planning and hosting, and venue scheduling/management. The best DMOs and sports commissions are able to effectively manage everything “outside the lines” so their clients can concentrate on the competition itself (“inside the lines”). While the existing effort relating to sports tourism is strong, the Consultant recommends VMGC enact two (2) additional strategies:

- a. Job Titles – The current sports staff leader has “sales” in his title. The word “sales” often conveys a “heads in beds” focus to sports event rights holders which could deter them from doing business in the Mississippi Gulf Coast market. Event rights holders want to know that the communities they partner with know how to support sporting events and will do everything they can on game day to deliver the best end product for their athletes, their families, and fans. The Consultant recommends that VMGC change the sports sales manager position title to “Sports Development Manager”.
  - b. Local Services – The Consultant recommends that VMGC conduct a “Sports Service 101” program to educate area hospitality leaders on the best practices in hosting sporting teams, families, and fans (which is quite different than hosting convention goers and the corporate market). An educated host community will lead to a great experience for sports guests, which will likely lead to renewed agreements with the nation’s top event rights holders.
2. Budgets – Currently, the sports sales and marketing budget allocations are spread across several VMGC departments, and in some cases are not specifically allocated for sports efforts. Ideally, the sports budget would be streamlined to specifically manage and measure the year-to-year success of all sports tourism and events marketing activities, and would be illustrated in financial reports as one bucket with its own chart of accounts for tracking purposes.

#### Primary Recommendation #2: External Organizational Structure

There are two (2) external focus areas the Consultant believes a slight restructuring could prove beneficial to VMGC.

1. Branding – As the focus of VMGC trends towards an increased sports marketing effort, the organization should offer a brand that matches the newly expanded program. The Consultant recommends that VMGC rename this program “Mississippi Gulf Coast Sports.” While still a division of VMGC, this department must have its own branding, web site, and staff (the current VMGC site doesn’t present sports as strong as it needs to be represented, sports is grouped under “meetings & groups” and the sports related pages are difficult to find and also to navigate). This slight rebrand sends a strong message to



the external world that Mississippi Gulf Coast is marketing savvy and about far more than just heads in beds. Further, these changes alert the sports industry that the team in the Mississippi Gulf Coast has the ability to serve as the custodian or partner in major activities to promote the area. The room nights will come, however the Consultant believes that leading with a heads in beds focus has the ability to scare away potential opportunities.

2. Advisory Council – The creation of a sports advisory group to support the ongoing efforts of the VMGC sports department is a concept that should be investigated. Many “blended” sports tourism efforts (that is, a sports marketing program within a DMO) have experienced challenges in managing these advisory groups. While these groups could provide governance challenges for the VMGC staff, if the members are carefully identified and given a specific job task, they can prove to be very powerful. The Consultant recommends a careful planning process go into the structuring of the initial Sports Advisory Council. This body must have a formal role and participation expectations that support VMGC’s expanding tourism efforts.

### Primary Recommendation #3: Messaging and Marketing Platforms

Throughout the research process, the Consultant encountered instances where stakeholders (both internal and external) showed a lack of understanding on the importance of sports tourism for the Mississippi Gulf Coast. While this is very common in markets the size of Hancock (population 45,000), Harrison (196,000), and Jackson Counties (140,000), an effort needs to be made to better message the impact of sports tourism on the area. The Consultant recommends the following action items to help improve VMGC’s sports tourism messaging to both internal and external stakeholders:

1. Local Communications – VMGC area stakeholders, including area venue managers and the hospitality community at large, all need an increased education on the value of sports tourism to the area. In order to deliver upon this message, the Consultant recommends the VMGC: (1) Define the value proposition for sports tourism, (2) create forums to spread the word on the value of sports tourism to area stakeholders, (3) leverage the area’s major events to sell the destination, and (4) measure the impact of all events hosted in the destination (through either the NASC or DMAI impact models).
2. Targeted (National) Outreach – In the future, Mississippi Gulf Coast Sports should conduct sales trips and FAMs in conjunction with major events (locally and nationally) and include local leaders and/or elected officials. VMGC should budget for these added outreach events as well as the costs of travel for the leaders/elected officials that participate. The sports industry is all about relationships. The Mississippi Gulf Coast team will be better served to develop these relationships in one-on-one environments, rather than through busy trade shows, and advertisements in trade publications.

3. Strategic Partnerships – There is great opportunity for VMGC to build bridges in the Mississippi Gulf Coast community. More specifically, there is a need for the newly expanded sports marketing effort to bring area sports groups into the fold. Relationships can be greatly improved with the Mississippi Gulf Coast Golf Association, the area's elected officials, and the Convention Center staff among others. VMGC should find ways to consistently recognize the successes of these individuals and also to support their ongoing efforts that drive overnight stays. The end goal is for Mississippi Gulf Coast Sports to be viewed as the "go to" organization when its partners need help to host an event.
4. Trumpet Successes – In all cases where Mississippi Gulf Coast Sports is involved in the production of an event (or simply issues a Marketing Incentives Grant), the organization should make it a priority to issue a press release on the community impact of the event. This release should be sent out via traditional and also new media outlets. The information should include economic impact data derived from the aforementioned NASC or DMAI tools. It is important that in this process that VMGC steer clear of the perception of taking credit for the event in total, and that the event rights holder be included in the promotion process throughout.

#### Primary Recommendation #4: Booking Concepts/Empowering Promoters

1. Booking Policies – The VMGC Sports department should strive to have “favored nation status” at all parks and recreation facilities, the convention center, as well as at private facilities such as those governed by MGM. While this is easy to state on paper, it is often tougher to achieve due to differing priorities between the venue managers and VMGC. In some cases, this is also difficult to achieve where there is “territorialism” between various community constituents. If VMGC were able to assist financially with the enrichment or expansion of area venues, there would be opportunity to request this favored nation status in the future. In addition, a transparent (shared) calendar at all venues is critical for VMGC to add value to event managers over time. This calendar would include the parks facilities and privately run venues among others.
2. Empower Local Promoters – Mississippi Gulf Coast has a strong foundation of event promoters whose work supports the mission of VMGC. These locally based event professionals offer VMGC a tremendous resource to build annual sporting event properties, and thusly increase economic development. By offering support to these locally incubated programs, VMGC can build a solid annual cache of events that will allow it to then pick and choose where to participate in competitive bids for additional regional and national tournaments. In each of these cases, the existing Marketing Incentives Program will serve as a critical asset to support these expanded sports tourism efforts.

### Primary Recommendation #5: Venue Enrichment/Development

1. Infrastructure Challenges – In order to be a valued community partner over the long haul, VMGC’s Sports division needs to be in a position to offer support for future venue expansion. This includes facilitating a master plan for the region, creating a venue improvement fund (see below), and/or finding consistent ways to support area partners and their venue projects (such as the vision plan in place at the Gulfport Sportsplex).
2. Incentives Program – The existing Marketing Incentives Program is a key strength for VMGC. As an ever evolving effort, the key goal for all grants is to help VMGC partners deliver overnight stays in shoulder and off-peak seasons. With hotel occupancy and tax collections on the rise, this program should be expanded upon to offer seed funding for created events by area promoters. In addition, the VMGC Sports staff should be in a position to support the grant recipients in order to help them reach their end goals, which means more room nights for the area. Finally, there is a strong national trend where destinations are putting bed tax funds into the construction and/or operation of new sports facilities (see Appendix A). This is something VMGC should also consider in the future.
3. New Venue Development – There is ample opportunity for VMGC to lead the way in the creation of new venues for the area. Specifically, the Consultant recommends VMGC leadership engage the decision makers that control various funding sources (examples: BP, the Governor’s office, those that allocate Restore Act Funds) to help fund a new sports complex skirting I-90 along the Gulf Coast. This complex would likely best serve the multi-sports market (soccer, lacrosse, ultimate, rugby, quidditch, etc.) as the area already has numerous fields available for the bat and ball sports. However, this process shouldn’t discount the concept of specialty venues such as an archery range or a BMX track. There is ample land along the coastline that is likely not usable for any permanent structures due to cost prohibitive insurance premiums. Further, there is virtually no connectivity between the MGM Park area and the Convention Center facility. This 5.1-mile stretch, including Miramar Park, has several select service hotels, ample restaurants, and a handful of local attractions to serve as an excellent anchor facility to drive increased overnight stays.

### Secondary Recommendation #1: Created/Owned Events

Once the new Mississippi Gulf Coast Sports effort gains traction, and some of the enclosed actions have been implemented, the organization should have a strategic discussion around VMGC created and owned events. While VMGC currently “incubates” the creation of new events through its Marketing Incentive Program, this expanded focus would include a promoter type role for the VMGC Sports staff. Event concepts that should be explored include, but are not limited to:

- The creation of a World Golf Amateur style event (see Myrtle Beach) run in conjunction with the Mississippi Gulf Coast Golf Association. The Mississippi Gulf Coast has numerous high quality golf courses and weather that is ideal to host such an event in the shoulder tourism season.
- Development of a locally owned marathon/10K/5K which has been explored in the past (“Bridge to Bridge Marathon”). In the case of road races, outside agencies would need to be employed to handle event logistics, but the key here is that VMGC is driving the effort, and making sure that these created events deliver ancillary overnight stays in the market.
- Launching of “showcase” style high school and college events in a similar manner to the college softball tournament that is held at the Bridgeport Sportsplex. The I-10 corridor offers regional accessibility for numerous high schools and colleges in the southeast, which provide an ample target audience for participation in showcase type events.

The end goal would be for VMGC to create and operate a new event each year with the long-term intent of running a library of events that fulfill the tourism mission of the organization. Taking a more active role in the development of tourism driving inventory, VMGC would be in a better position to fill shoulder and off-peak dates that would positively support the hospitality community.

#### Secondary Recommendation #2: Adding Special Events/Expanding Services

In the future, when the sports program is on firm ground and resources are available, the Consultant recommends the following tactics:

1. Expand the Market – Currently, VMGC does not differentiate between sports and events. In fact, VMGC does not account for “special events” as a market segment to sell against. The tri-county area has had great success in hosting non-sporting events such as the car show and the crawfish festival. These events provide a solid foundation that can be built upon in the future. The skills required to sell and service sporting competitions versus specialty events are quite similar. In that light, the Consultant recommends that in the future VMGC expand the responsibilities of the sports department to include non-sports events. Specifically, this would include the attraction and servicing of festivals, concerts, and non-sports related programs. As sports marketing and event management is similar to that of a concert or festival, several DMOs have merged the sports market with the “events” market. The Consultant suggests that when the time is right, an expanded sports marketing effort for the Mississippi Gulf Coast also include special events under one umbrella.
2. Expand Events Services – When resources are available, VMGC should make sports and events services a full-time position. Role clarity around servicing sports and events

**Huddle Up Group • 3920 E. Thomas Road #97416 • Phoenix, Arizona 85060**



clients is critical. In order to be on par with some of the top sports tourism entities in its competitive set (examples: Virginia Beach, Savannah) the Consultant recommends that VMGC make one person solely and exclusively responsible for servicing sports and events groups. In order to continue the growth of this market, VMGC should invest in this position to best match up with its primary competition. Rights holders and National Governing Bodies surveyed by the Consultant in the past indicated that the level of event support they receive in host communities determine where their events are held (and if they return in future years). The best sports destinations, be they sports commissions or DMOs, have dedicated event staff to help the event organizers prior to, during, and after their events. This newly dedicated service position will be a strong selling point for the sports sales staff to leverage when trying to attract events to the region.

### **Conclusion**

Tourism is the glue that holds the Mississippi Gulf Coast together. Noted earlier in this report, tourism is a major economic driver for the Gulf Coast region. Increasing overnight hotel stays is critical to sustaining the long-term financial success of the area. This is especially true for the off-peak and shoulder tourism seasons (September to February). With that in mind, there is opportunity for VMGC and the community at large to double down on the sports tourism market.

Over the past decade, the Gulf Coast has made a moderate investment in the sports tourism marketplace. There is additional opportunity to build upon the past success in hosting participant driven tournaments. In order to further enhance the impact of sports tourism in the Mississippi Gulf Coast area, VMGC needs to expand its sales and marketing efforts to achieve three (3) primary objectives:

1. Create a culture of sports marketing, rather than purely sports sales.
2. Continue to enhance the area's venue offering.
3. Communicate the value of hosting sporting events on the local economy.

In order to be effective, the mission of this expanded sports initiative needs to be creative in how it promotes the destination, and in how it empowers its local event promoters to build a foundation for long-term success. There is opportunity to attract or create/incubate annual events such as a college basketball tournament, amateur golf tournament, or a regional soccer showcase. These events would add to the tourism coffers year over year, but would only be possible with a gradual shift in focus of VMGC to help local promoters/partners incubate these events in their early development.

Specifically, the Mississippi Gulf Coast Sports staff should focus its resources on three (3) initiatives (or "Pillars" as outlined in Appendix E). Each Pillar has a specific target audience, as well as tactics to achieve the goals for each area. The Pillars are meant to be simple and also clarifying, so both internal and external stakeholders can easily understand the mission of Mississippi Gulf Coast Sports. The Pillars include the following three (3) focus areas:

1. Events – Traditional marketing towards rights holders and NGBs in the form of bid-in events, as well as the empowerment of local promoters to grow/create locally developed events that deliver on VMGC’s tourism mission. In a perfect world, VMGC would be the driving force to host one event every week during the calendar year (“Events 52”).
2. Facilities – To be competitive over time, VMGC must facilitate a constant dialog and strategy to enhance existing event venues and to seek opportunity to build new “anchor” facilities. This is especially true in the area of multi-sport fields as the Gulf Coast region is deficient in this area. VMGC is the most well suited organization in the Gulf Coast area to have an inclusive dialog with all stakeholders on the topic of venue development and enrichment. As the venue tool kit in the region keeps pace with the national competition, so will the impact of sports and events tourism on the Gulf Coast.
3. Community Engagement – Messaging the mission of Mississippi Gulf Coast Sports in a meaningful way to various stakeholder groups. Unified understanding of the impact sports tourism has on the area will mean sustainable community support, which will lead to a stronger overall tourism effort for the destination.

The unprecedented growth of the sports tourism industry (see Appendix B) shows the high level of market sustainability that supports the expansion of economic development in this space for the Mississippi Gulf Coast. The expanded events and marketing efforts suggested here, coupled with an improved venue mix, will serve to positively impact the region’s tourism results.

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

In the eyes of the Consultant, the puzzle pieces exist in the Mississippi Gulf Coast to build a game changing venue, and to launch an enhanced sales and marketing effort to compete in this highly competitive industry. The only question would be to what extent this expanded effort can be supported in order to better benefit the region. It is within the power of Visit Mississippi Gulf Coast to capture more opportunities in this market by leading the area towards a “regionalism” mentality and by connecting the sports and hospitality communities in an ongoing and proactive manner going forward.

## **Appendix A – Trends in New Facility Funding**

The most common funding source for new facilities is a general fund allocation from the city/county where the facility is located as well as a land contribution for the venue to be constructed (again donated by the city or county). Although the level of success is yet to be determined, several communities around the country have already, or are in the process of, raising their bed tax collection rate to fund sports-related facility development, including:

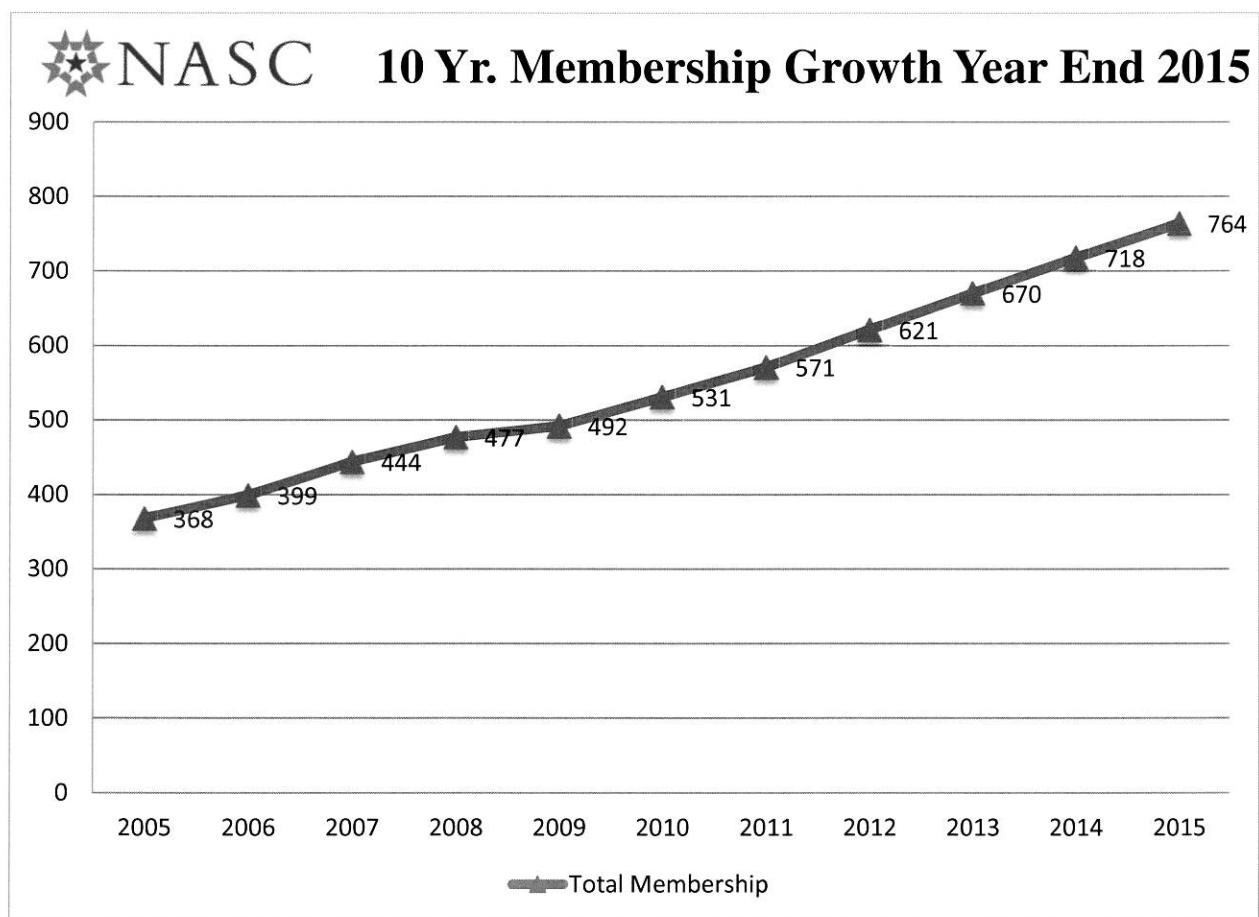
- Evansville (IN) recently opened a new \$15 million multi-use outdoor sports complex that is entirely funded by bed tax dollars. The future management of this facility will also be funded by bed tax dollars and it is run by the CVB itself.
- Spokane (WA) is in the process of bonding \$25 million against future bed tax collections to construct a new athletic field house.
- Shreveport (LA) recently passed a bed tax increase for the expansion of their sports commission's national marketing program. This new tax also supports the Independence Bowl (venue enhancements) and the regional airport (incentives for new airline routes). This combined effort between three of Shreveport's leading agencies shows the economic development impact that sports tourism can have on a mid- or small-size market.
- Fox Cities (Appleton, WI) recently raised their bed tax rate from 6% to 10% to build a convention center, a large indoor sports complex, and to renovate three existing sports facilities used to attract regional and national tournaments.
- Rockford (IL) having already finished a significant expansion of its outdoor sports venues, is in the process of using bed tax dollars to bond \$10 million towards a new indoor facility. The Downtown Sports Complex carries a price tag of \$24 million and is slated to open in late 2016.
- Placer Valley (CA) is allocating funds from an increased bed tax as well as a new hotel assessment to construct and manage a \$35 million multi-use all turf sports complex. The venue will be managed by the area tourism bureau and is slated to open in 2017.
- Pasco (FL), in partnership with the Florida Sports Foundation, is in the process of developing a new sports complex on 120 acres of county-owned property. Pasco County is investing \$11 million to the project, including \$8.5 million in tourist tax funds and \$2.5 million in unrestricted bond proceeds.
- In January 2016, Warren County (OH) raised the lodging tax one (1) percent to finance a \$10 million, 20 field sports complex. The rate hike increased the county hotel occupancy tax from 3% to 4%. The tax will be used over 20 years to pay off debt the Warren County Convention & Visitors Bureau will take on to pay for the complex.

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

## Appendix B – National Association of Sports Commissions (NASC) Membership

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

Projections indicate that the grass roots sports tourism industry (exclusive of mega events like the Superbowl, Final Fours, etc.) is growing at a pace of 12-14% per year, with more growth anticipated in the coming decade. Below is a chart outlining a 10-year growth pattern of membership organizations within the NASC, which is a direct correlation to the growth of the sports tourism industry as a whole.



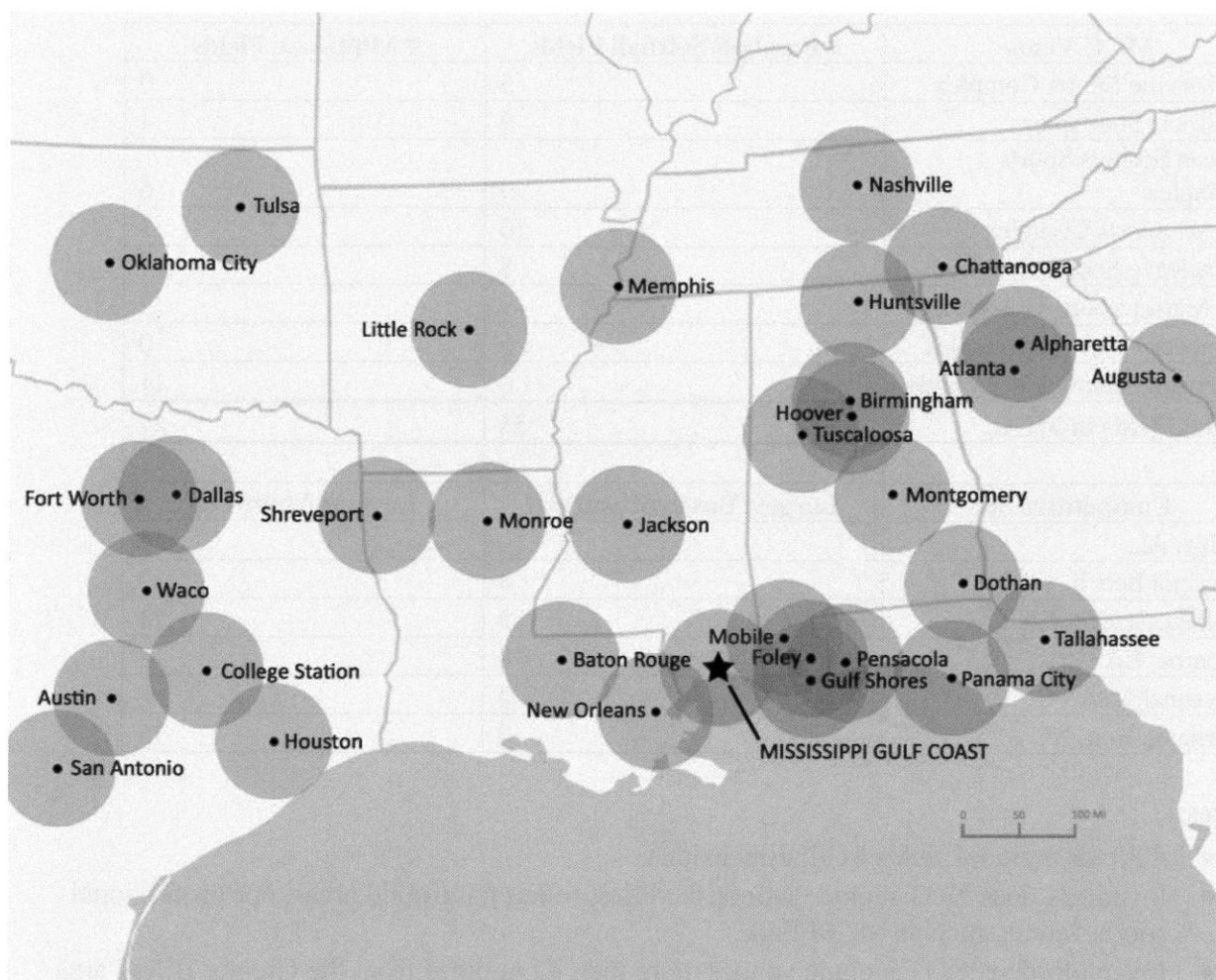
**Huddle Up Group • 3920 E. Thomas Road #97416 • Phoenix, Arizona 85060**



## Appendix C – Regional Competition Analysis

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

Below is a visual representation of the various entities in the South-Central United States that are active in the sports tourism and events space. The circles surrounding each city represent a 50-mile drive market for local and regional events. While tournaments often attract teams from as far away as a full day's drive, this graphic shows the significant level of competition in this industry and the high level geographic overlap amongst these communities.



Huddle Up Group • 3920 E. Thomas Road #97416 • Phoenix, Arizona 85060

## Appendix D – Mississippi Gulf Coast Sports Venue Inventory Summary

The Mississippi Gulf Coast has several baseball/softball venues that, when available, can host regional and national tournaments. However, the area has a very limited supply of multi-purpose fields that can host tournaments in soccer, lacrosse, quiddich, ultimate, field hockey, etc. In order to compete nationally, the Mississippi Gulf Coast needs to expand its multi-purpose venue offering. The Gulf Coast doesn't have to compete with the nation's top tier venues (examples: Disney Sports Complex, Overland Park, Frisco Texas) to be relevant in this space, but the destination has to have the venue inventory to at a minimum challenge it's peer group (see below).

<b>MGC Venue</b>	<b># Baseball/Softball Fields</b>	<b># Multi-Use Fields</b>
D'Iberville Sports Complex	5	0
Gulfport Sportsplex	9	4
Ocean Springs Sports Complex	9	6
Biloxi Sports Complex	10	3
Vancleave Sports Complex	8	1
St. Martin Sports Complex	9	2
Hancock County Sportsplex	5	0
Harrison County Fairgrounds	0	11
<b>Total Fields in MGC</b>	<b>55</b>	<b>27</b>
<b>Competitive Set</b>	<b>Largest Baseball/Softball</b>	<b>Largest Multi-Use</b>
Foley, AL	10	16
Virginia Beach, VA	8	19
College Station, TX	5	11
Monroe, LA	8	8
Savannah, GA	4	8
Bermuda Run, NC	0	15

### Notes:

- # Fields includes fields of all dimensions.
- Inventory does NOT include indoor facilities, rodeo/fairground areas, nor professional sports venues such as MGM Park.
- Inventory does NOT include venues more than 45 minutes from the Greater Biloxi area.
- Competitive set numbers are the number of fields in that discipline in one location.
- The Virginia Beach facility has an additional seven (7) multi-purpose fields and a stadium field immediately adjacent to the complex noted above.

**Huddle Up Group • 3920 E. Thomas Road #97416 • Phoenix, Arizona 85060**

## Appendix E – Mississippi Gulf Coast Sports 5-Year Strategic Mission Pillars

In the future, Mississippi Gulf Coast Sports should sharpen its focus on three (3) key mission areas, or “Pillars.” Each Pillar is driven by a different audience, and has a unique activation model. This refined focus will help the organization enhance its messaging and will deliver directly on the organization’s mission. The recommended Pillars are below along with their driving audiences/factors.

	<b>Mississippi Gulf Coast Sports 5-Year Strategic Mission Pillars</b>		
	<b>Pillar</b>		
	<b>Audience</b>		
	“Events 52” Bid Events Locally Incubated Events	Facilities	Community Engagement
	Tourism Economic Development Rights Holders + NGBs Local Promoters	Elected Officials Governor’s Office Restoration Funding Economic Development City/County Leaders	Elected Officials Local Media Non-Profit Civic Groups Hospitality Leaders
	Tactics		
	Event Bids Marketing Grants Grow Existing Events 10%/Yr. Support New Event Creation	Master Plan Current Venue Enhancement New Venue Development	“6&6” Lunches Economic Impact Releases Sales Trips FAMs