

FLORIDA
CITRUS SPORTS

RETURN ON INVESTMENT

Camping World Stadium
Orange County TDT Task Force
October 3, 2023

This is a Community Center.



CAMPING WORLD STADIUM

ARC SCORING ELEMENTS

COMMITMENT TO EXPANSION OF TOURISM IN ORANGE COUNTY

- Attraction of Tourists:
67% of 2022 attendees non-local
- Advertising Reach:
Seven events with national or international broadcast in 2022
Trillions of overall impressions across news and social media

SOUNDNESS OF PROPOSED EVENT OR CAPITAL PROJECT

- Quality, maintenance, and stewardship
City-owned existing facility
- Process/Design and Planning
Shovel ready within 12 months of approval
- Operational Readiness
In operation since 1936
- Financial Readiness
Can be bonded as in past TDT investments

ANTICIPATED RETURN ON INVESTMENT

- Economic benefits:
\$600 million economic output in 2022

SPORTS TOURISM INDUSTRY MARKET OVERVIEW

\$91.8 BILLION

TOTAL NATIONWIDE IMPACT

635,000

TOTAL JOBS GENERATED

\$12.9 BILLION

TOTAL TAX REVENUES

CONCERTS & LIVE ENTERTAINMENT INDUSTRY MARKET OVERVIEW

\$132.6 BILLION

TOTAL NATIONWIDE IMPACT

913,000

TOTAL JOBS GENERATED

\$17.5 BILLION

TOTAL TAX REVENUES

-
- Sports industry data based on Tourism Economics "State of The Industry Report" (2021)
 - Concert & Live Entertainment industry data based on Tourism Economics "Concerts and Live Entertainment Industry Report" (2019)

SPORTS TOURISM COMPETITION

The New York Times

As the Raiders Exit Oakland, Las Vegas and a \$2 Billion Stadium Await

Fans are already starting to see the shift of Raider Nation from California to southern Nevada. Can the team really boost the economy in a city built around tourism?

Dec. 13, 2019



Titans, Nashville reach deal for domed, \$2.1B stadium



Turron Davenport
ESPN

Oct 1, 2022

NASHVILLE, Tenn. -- The Tennessee Titans have an agreement in place with Nashville Mayor John Cooper to build a new stadium.

SPORTS TOURISM COMPETITION

venues REPORT

JAGS PICK HOK TO DESIGN STADIUM UPGRADES

"... an extensive renovation proposed for TIAA Bank Field ... would include **a shade roof covering the seating bowl** ... [team president Mark] Lamping said.

"Industry sources say the renovations in Jacksonville could reach **\$1 billion** ..."



WHAT'S AT STAKE?

Part 1: Major Sports Tourism Events

World Cup 2026

Orlando Sentinel

FINAL EDITION

Friday, June 17, 2022

\$1.50

FIFA SKIPS ORLANDO

Miami among
host cities chosen
for 2026 World Cup

Orange County Mayor Jerry Demings opposes substandard FIFA venue, says party for the 2026 FIFA World Cup announcement Thursday at Camping World Stadium in Orlando. The city of Orlando was not chosen as one of the sites for the World Cup tournament. Moments after the announcement, Miami Mayor Francisco Suarez and elected officials celebrated being named a host city for the 2026 FIFA World Cup, dancing a wacky party at the A Fazio Brothers in Coral Gables.



DANIEL A. VARELA/THE MIAMI HERALD

According to a study done by The Boston Consulting Group (BCG) ... individual [2026 World Cup] host cities could expect to see approximately **\$160 - \$620 million** in incremental economic activity.

SOURCE: US SOCCER

Camping World Stadium already has hosted soccer matches during the 1994 FIFA World Cup, 1996 Summer Olympics and 2016 Copa America Centenario.

*Central Florida leaders had said they hoped to bring back the energy, festivities and visitors that the 1994 games brought to the area. Tourism experts had predicted that the event could have brought **350,000 visitors...***

SOURCE: SPECTRUM NEWS 13

WHAT'S AT STAKE?

Part 1: Major Sports Tourism Events

Army-Navy Game

COLLEGE FOOTBALL

City can't land 2027 Army-Navy contest

By Matt Maruckel
Orlando Sentinel

Orlando lost out on an opportunity to host the Army-Navy game in 2027, with the annual matchup between service academies slated to return to Philadelphia.

Orange County officials submitted a bid hoping to lure one of college football's oldest rivalries to Central Florida.

Instead, Army-Navy officials decided Wednesday to bring the game back to Philadelphia, which has hosted 89 times previously, including in 2019 and 2022.

It was one of five different locations selected to host the rivalry game for the next five years starting with Fenborough (Dec. 9, 2023), Washington D.C. (Dec. 14, 2024), Baltimore (Dec. 13, 2025), East Rutherford N.J. (Dec. 12, 2026) and Philadelphia (Dec. 11, 2027).

"Extraordinary efforts put forth throughout the bidding process made evaluations and final city selections highly competitive," said Navy athletics director Chet Gladchuk via statement. "Proposals brought forward included local, city and state dignitaries to ensure the most comprehensive presentation could be made to the selection committee. The perennial partnership we share with USAA clearly re-enforced the enthusiastic interest in hosting the Army-Navy game by many of our nation's greatest cities."

"Our destinations over the next five years provide the Academies with an opportunity to share the economic impact, history and tradition of Army-Navy with a number of communities in diverse geographic areas."

The game has never been played in the South, with the majority of the matchups taking place in northeastern states such as New York, Pennsylvania, Maryland, and New Jersey. Chicago's Soldier Field (1926) and the Rose Bowl (1983) also have hosted the event.



Five NFL stadiums to host Army-Navy game in next five-year cycle (2023-27)

Gillette Stadium will host rivalry for first time in 2023



- **\$30 million** impact on regional economy
- **72%** of attendees from out of town

Source: Philadelphia Convention and Visitors Bureau

- Average of **7.1 million viewers** on CBS over last ten years

WHAT'S AT STAKE?

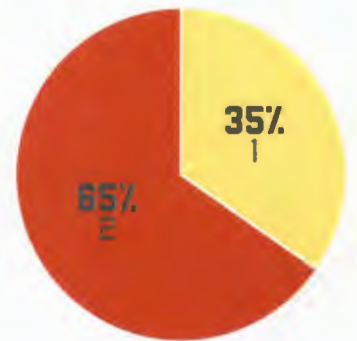
Part 2: Touring Concert Events

SIX TOURING CONCERTS IN 2022

- BILLY JOEL
- GARTH BROOKS
- PAUL MCCARTNEY
- DEF LEPPARD / MOTLEY CRUE
- BAD BUNNY
- RED HOT CHILI PEPPERS

TOTAL ATTENDANCE

282,000



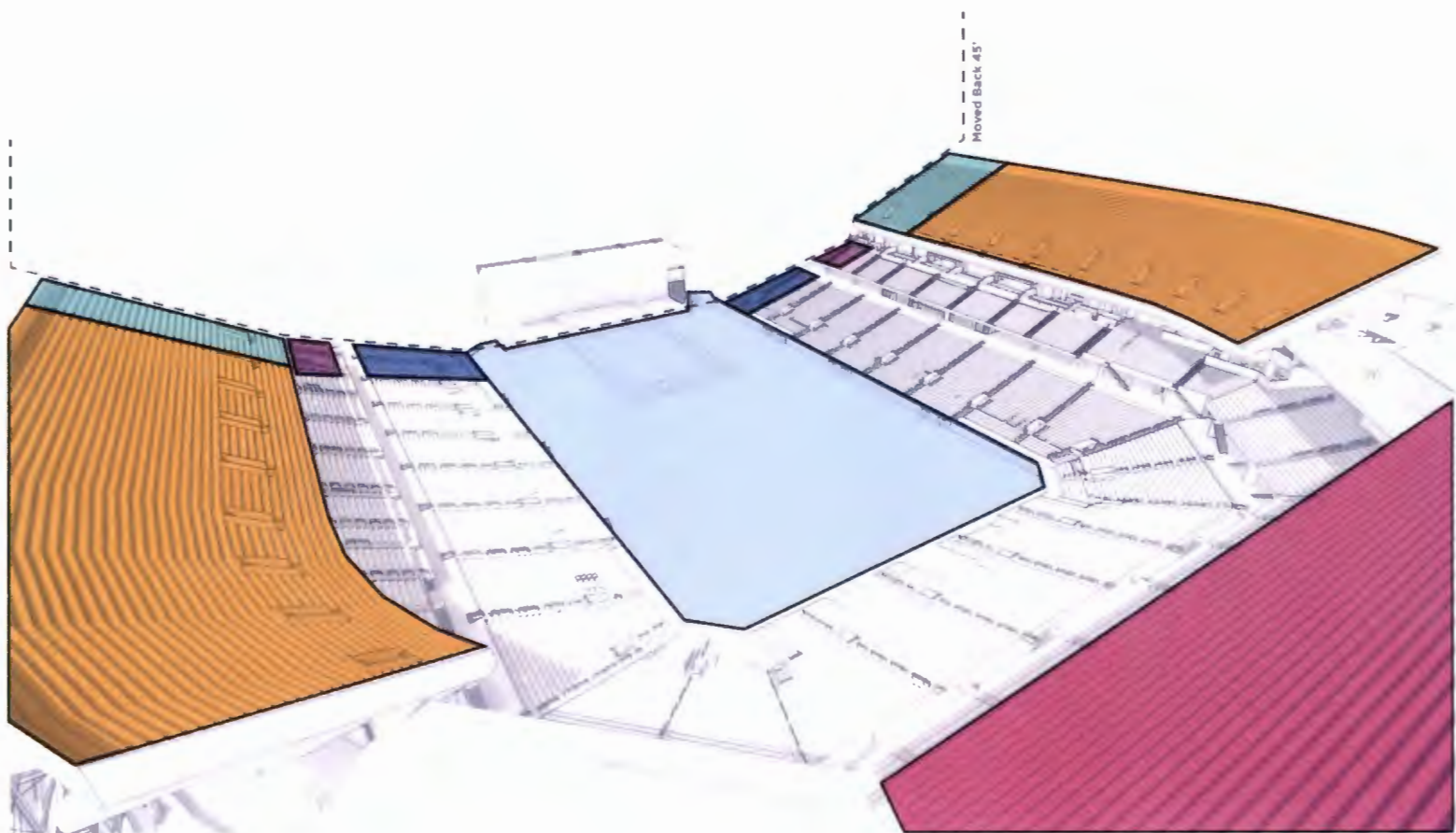
AVERAGES PER TOURING CONCERT

47K
ATTENDANCE

16K
ROOM NIGHTS

\$17M
ECONOMIC IMPACT

- Visitor & local attendance % based on purchaser location data across individual events
- Room nights and impact based on Destinations International analysis of individual event data



ECONOMIC IMPACT

Camping World Stadium
2022 Calendar Year

TOTAL ATTENDANCE

921,623

ROOM NIGHTS GENERATED

373,092

20

TICKETED EVENTS

28

EVENT DATES



- Visitor & local attendance % based on purchaser location data across individual events
- Room nights based on Destinations International analysis of individual event data

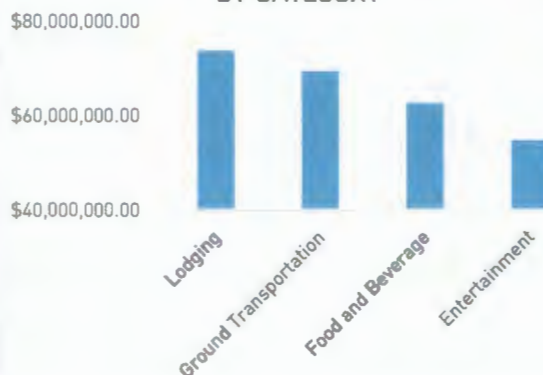
ECONOMIC IMPACT

Camping World Stadium
2022 Calendar Year

TOTAL OUTPUT

\$632 MILLION

NET VISITOR SPENDING
BY CATEGORY



STATE & LOCAL TAX

\$43M



\$639

AVERAGE SPEND PER VISITOR

• Based on Rockport Analytics study using IMPLAN model

ECONOMIC IMPACT

During Construction

FIRST PHASE TO DATE

2014 AND 2021; COMBINED SCOPE \$260 MILLION

JOBS

5,250+

WORKER HOURS

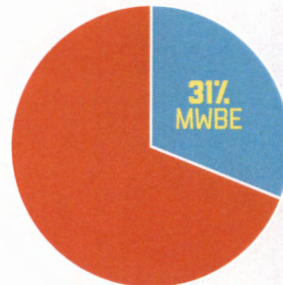
1.3 MILLION+

AVERAGE WAGE

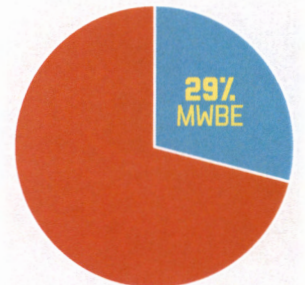
\$75K

RANGE: \$45K - \$105K

PROJECT DESIGN BUDGET



CONSTRUCTION PROCUREMENT BUDGET



City of Orlando Chapter 57 M/WBE goals: 24% for all contracts

ECONOMIC IMPACT

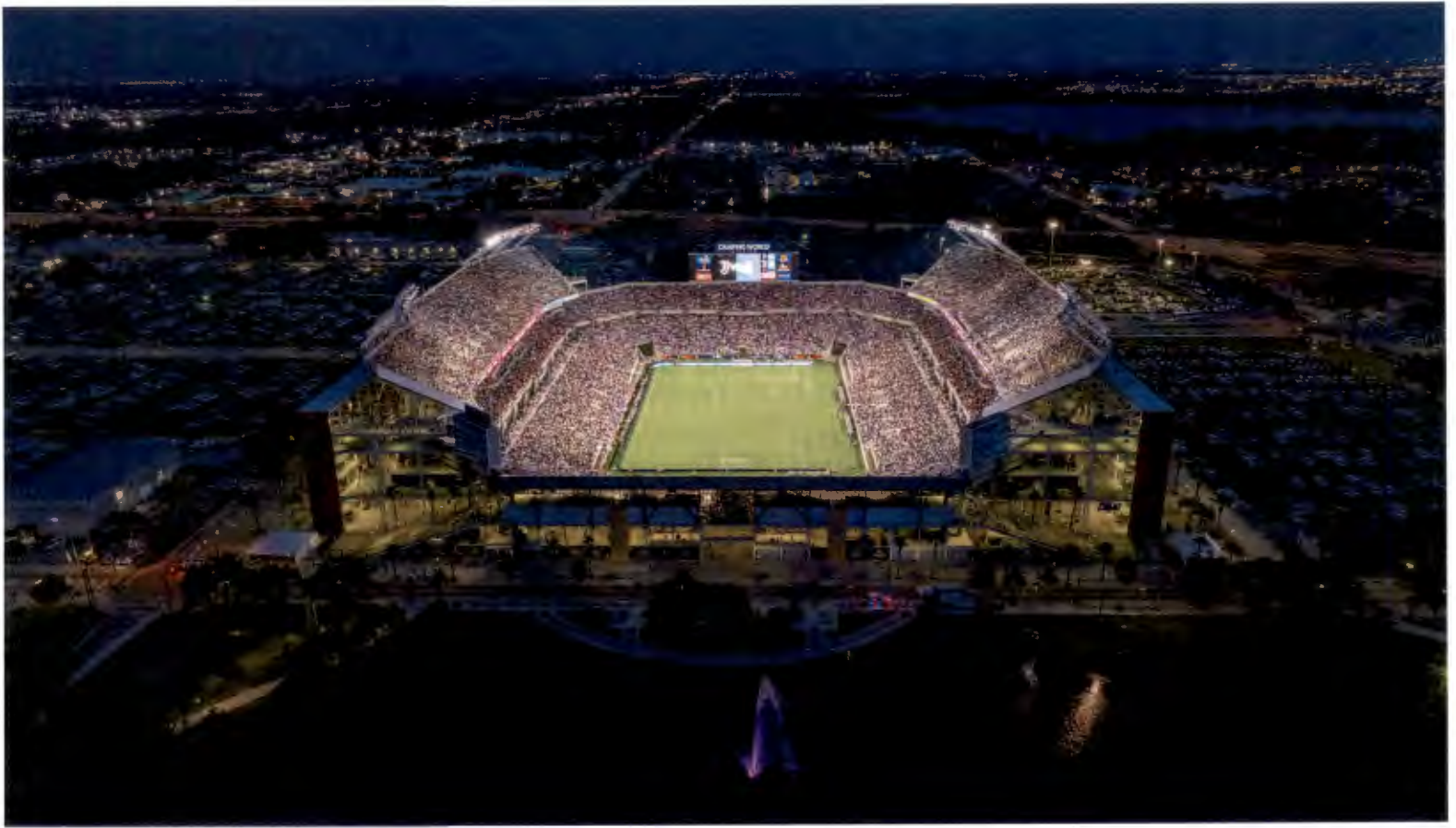
After Construction

2022 AT CAMPING WORLD STADIUM

6,100+
JOBS SUPPORTED

\$226 MILLION
LABOR INCOME

• Based on Rockport Analytics study using IMPLAN model



DESTINATION EXPOSURE

Snapshot:
2023 FC Series

BROADCAST LIVE TO 170+ COUNTRIES



DESTINATION EXPOSURE

Snapshot:
2023 FC Series

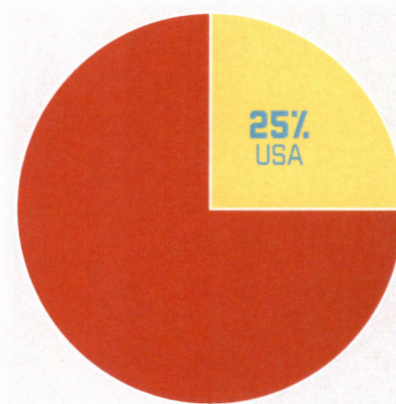
GLOBAL SOCIAL MEDIA AUDIENCE

67.2 MILLION
IMPRESSIONS

5.8 MILLION
TOTAL ENGAGEMENT

59.3 MILLION
VIDEO VIEWS

IMPRESSIONS



INTERNATIONAL IMPRESSIONS BY COUNTRY

- | | |
|-------------|-------------------|
| 1. BRAZIL | 7. THAILAND |
| 2. NIGERIA | 8. UNITED KINGDOM |
| 3. KENTA | 9. INDONESIA |
| 4. GHANA | 10. SOUTH AFRICA |
| 5. ECUADOR | 11. MEXICO |
| 6. COLUMBIA | |

Top 11 all registered at least 1 million impressions

• Data tracked across Instagram, Facebook, Twitter/X and Tiktok from January through August, 2023

DESTINATION EXPOSURE

Camping World Stadium
2022 Calendar Year

Seven events in Camping World Stadium in 2022 featured national/international linear television broadcasts.

Citrus Bowl: Kentucky vs Iowa	ABC
Under Armour All-American Game	ESPN & ESPN+
Monster Jam World Finals	NBC
Mexico vs Guatemala (soccer)	UniMas & TUDN
Chelsea vs Arsenal	ESPN+
Florida Blue Florida Classic: FAMU vs B-CU	ESPNU & ESPN3
Cheez-It Bowl: Florida State vs. Oklahoma	ESPN

TOTAL IMPRESSIONS

2.1T

Including news and social media coverage

DESTINATION MEDIA VALUE

\$32M

Based on direct references to Orlando & Central Florida across broadcasts, earned and owned platforms

- Impression data based on global reach data from Talkwalker
- Media value based on CSL study of FCS event broadcasts; does not include Under Armour, Monster Jam or Mexico/Guatemala

**CAMPING WORLD
STADIUM
CAMPUS**



HARD ROCK STADIUM CAMPUS







NEW TERRACE DECKS – BASE SCOPE

Looking south to north



FLORIDA 
CITRUS SPORTS

NEW TERRACE DECKS – BASE SCOPE

Looking south to north



FLORIDA 
CITRUS SPORTS

NEW TERRACE DECKS – BASE SCOPE

Looking south to north



FLORIDA 
CITRUS SPORTS

BASE SCOPE



FLORIDA
CITRUS SPORTS





WHAT'S INCLUDED IN THE PROJECT REQUEST?

BASE SCOPE - "COMPLETE THE VISION"

\$400M

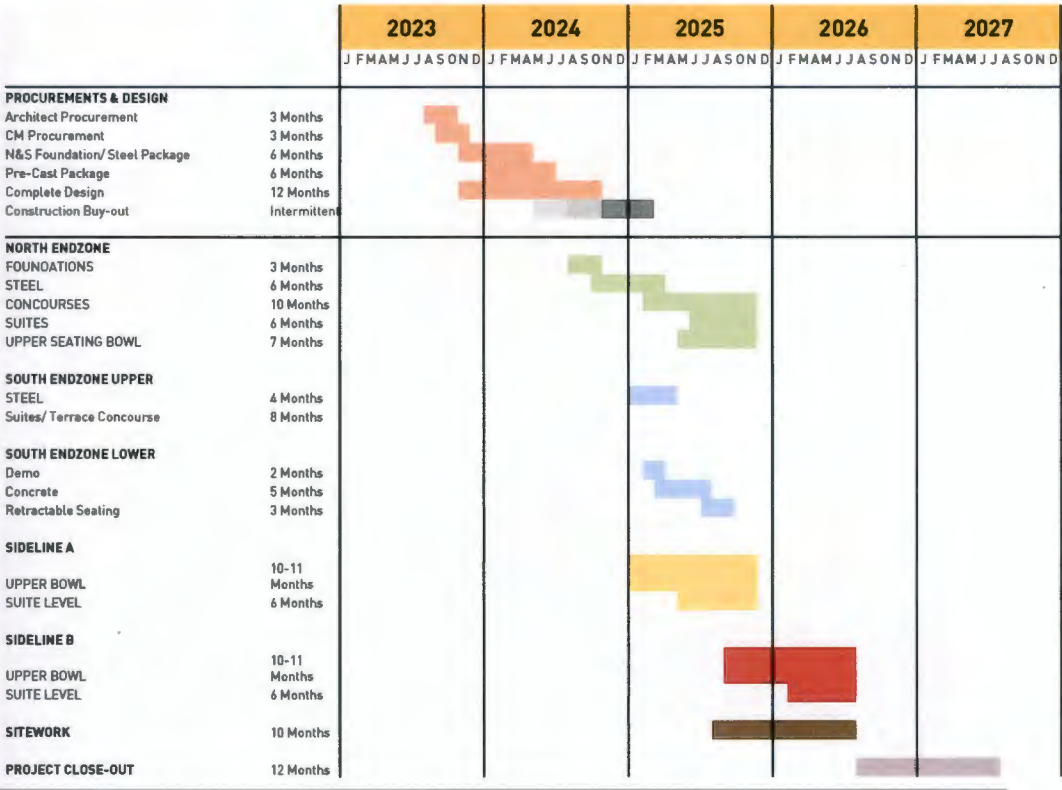
Remove and replace upper terrace decks
Increase vertical transportation
Connect all levels with 360-degree concourse
Add 100,000 sq ft of multipurpose space on campus



CONSTRUCTION TIMELINE

Pending approval of funds, initial construction can begin within 12 months

Initial completion targeted for the start of 2026 football season



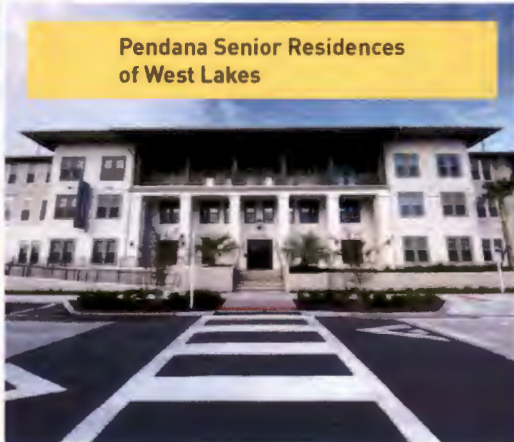




Pendana at West Lakes



**Pendana Senior Residences
of West Lakes**



West Lakes Early Learning Center



**Jacqueline Bradley and Clarence Otis
Family Branch Boys & Girls Club**



Lake Lorna Doone Park



**The Heart of West Lakes Community
Health & Wellness Center**





APPENDIX I:

ADDITIONAL FIELDHOUSE EXAMPLES

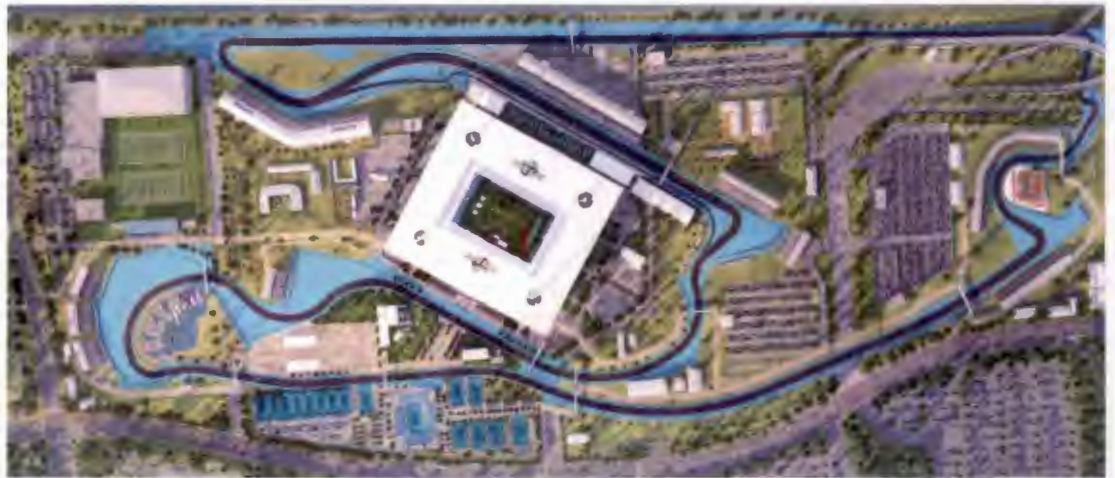
**CAMPING WORLD
STADIUM
CAMPUS**



FIELDHOUSE EXAMPLES

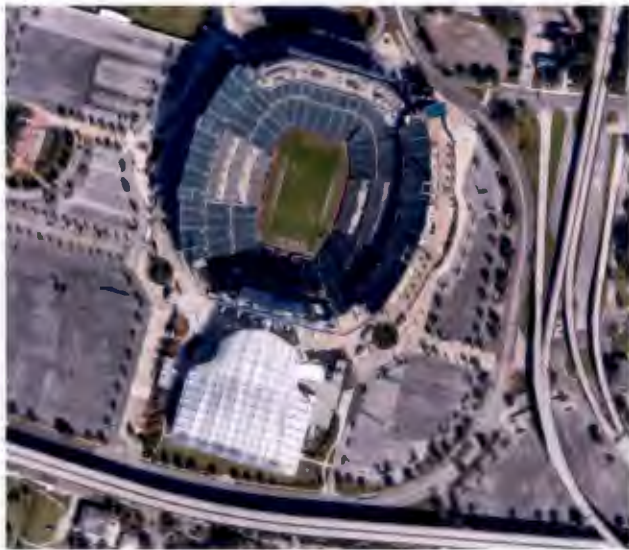
BAPTIST HEALTH
TRAINING COMPLEX

MIAMI



**FIELDHOUSE
EXAMPLES**

DAILY'S PLACE
JACKSONVILLE



FIELDHOUSE EXAMPLES

ADVENTHEALTH TRAINING CENTER

TAMPA



APPENDIX II:

ADDITIONAL CANOPY SCOPE



The transformation of your favorite global entertainment destination over the years •• 🌟

am Dolphins x a



The Renovation That Prepared Hard Rock Stadium For Super Bowl LIV



Forbes

"Other stadiums, arenas and ballparks should pay attention to the phased approach that the Dolphins took. By working across three off-seasons, the team was able to continue playing in the venue throughout and fans had new amenities to look forward to each season. When taking a phased approach, you have to be incredibly strategic and disciplined to ensure the final phases is as successful as the first."

Although much attention was paid to the stadium being the home of the Dolphins, the designers couldn't forget that the stadium would attract other major events. In addition to University of Miami football home games, the stadium also currently plays host to the Miami Open tennis tournament and college football's Orange Bowl.

"Designing for major events is always critical to our approach. There were various overlay studies done throughout the design process to ensure the venue can accommodate a myriad of functions and events," says Day.

"We also thought carefully about the entry and departure experience. We added a premium drive lane, that lets premium ticket holders have a fast pass, moving through a dedicated lane that helps corral traffic and keep things moving. These little details make major operational differences."

NEW TERRACE DECKS – BASE SCOPE

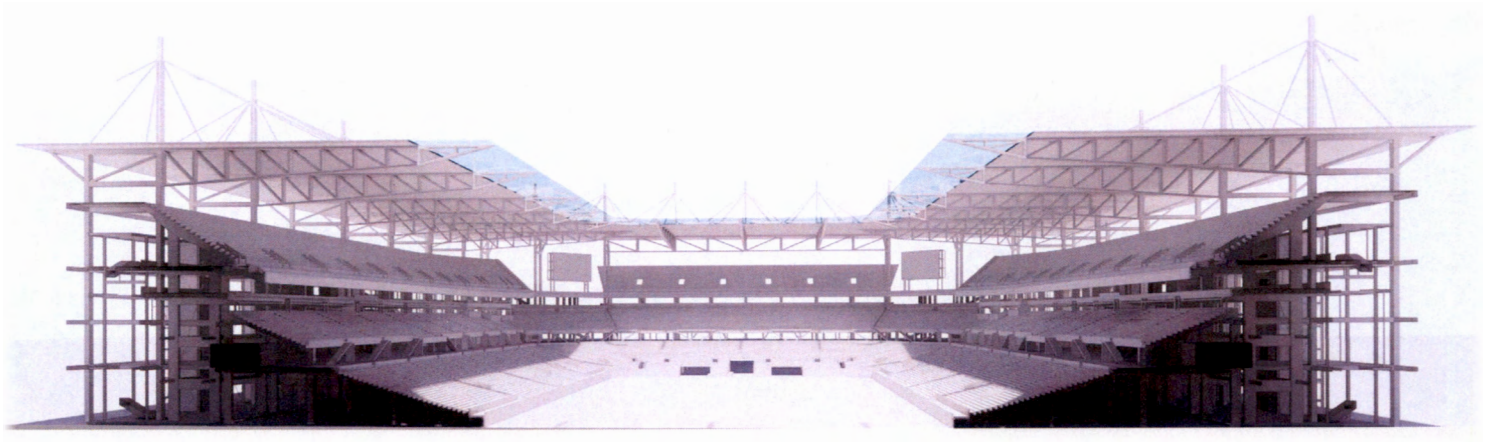
Looking south to north



FLORIDA 
CITRUS SPORTS

NEW TERRACE DECKS + CANOPY ROOF

Looking south to north



FLORIDA 
CITRUS SPORTS



