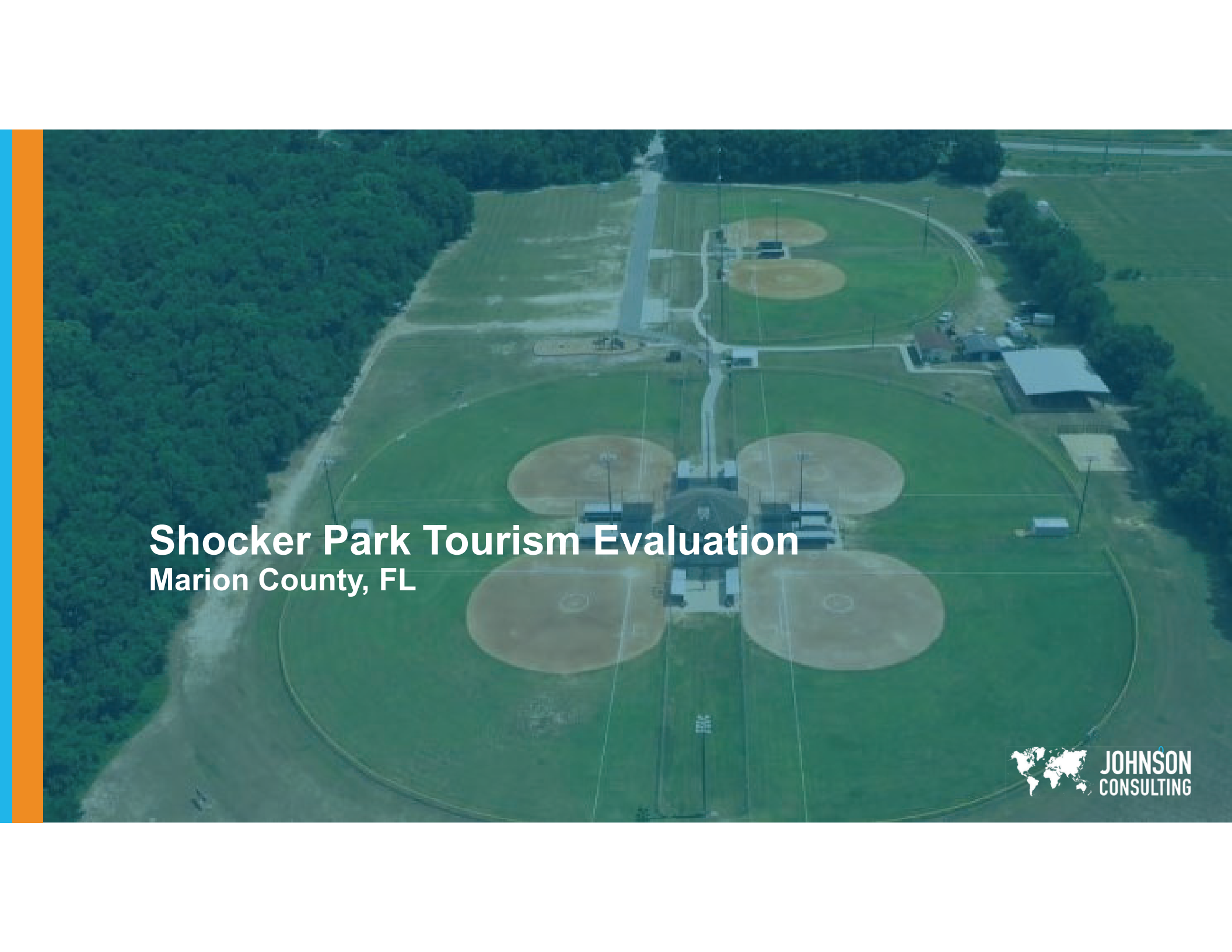


An aerial photograph of Shocker Park in Marion County, Florida. The image shows four baseball fields arranged in a 2x2 grid, separated by a central road and walkways. The fields have green grass and brown dirt bases. To the right of the fields, there are several buildings, including a large one with a grey roof, and some parking areas. The park is bordered by a dense line of trees on the left and top. The overall scene is captured from a high angle, providing a clear view of the park's layout.

Shocker Park Tourism Evaluation

Marion County, FL

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1.1 Introduction



Introduction

Study Introduction & Methodology

Johnson Consulting was retained by the Ocala/Marion County Visitors and Convention Bureau to conduct a Shocker Park Tourism Evaluation. The study aims to foster the ability of the Ocala/Marion County Visitors and Convention Bureau (VCB) and the County, as well as any local partner organizations, to make informed decisions regarding potential renovation and ideas to advance the complex. The proposal document submitted to the Ocala/Marion County VCB by Johnson Consulting outlines a detailed services for the study. Broadly, the objective of this study was to evaluate tourism-based enhancements to Shocker Park (the Complex) which are intended to potentially do the following:

- Increase the Complex's competitiveness in attracting regional, state, and national events.
- Generate additional hotel room nights and visitor spending in Marion County.
- Diversify and increase recreational amenities available to residents and visitors alike.
- Support the Board of County Commissioners' legislative findings required to authorize use of Tourist Development Tax (TDT) revenues for capital improvements.

In order to answer the questions above, Johnson Consulting developed and executed a comprehensive methodology for the study, which is illustrated by the figure on the right. In addition to the key study components listed to the right, Johnson Consulting conducted comprehensive stakeholder engagement sessions that included interviews with individuals from Marion County recreation organizations, Marion County Public Schools, Marion County Board of County Commissioners, Marion County Parks & Recreation Advisory Council, Marion County Administration, Ocala/Marion County VCB Staff, and Marion County Parks & Recreation, among others. The observations, analysis, and conclusions of the study will be presented throughout the remaining sections of this report.



Introduction

Project Overview

Shocker Park is in Marion County which is a located in North Central Florida between Gainesville and Orlando. Shocker Park currently serves as a draw for regional and national softball tournaments in addition to local recreation. Marion County is looking to utilize Tourist Development Tax (TDT) revenues for capital improvements that could both increase regional tourism and local recreation. In addition to Shocker Park renovations, Marion County owns a total of 80 acres at Shocker Park that could be developed to provide additional sports field inventory or other assets. These additional fields could be built using TDT revenues and could be used to attract new tournaments and minimize the number of events lost to other competitors.



An aerial photograph of a baseball complex. In the center is a large, multi-story building with a dark roof, likely a clubhouse or administrative building. Surrounding this central building are four baseball fields arranged in a 2x2 grid. Each field has a brown infield and a green outfield. A paved path runs along the left side of the fields, and another path runs between the fields. To the right of the central building, there are several smaller structures, including a large white shed and a smaller building. The entire complex is surrounded by a dense line of green trees. The text "1.2 Executive Summary" is overlaid on the left side of the image in a large, white, sans-serif font.

1.2 Executive Summary

Executive Summary

Market Assessment

The demographic and economic analysis indicates that Shocker Park is positioned to serve both its immediate local community and a substantially larger regional market. Despite the Ocala/Marion County area exhibiting lower educational attainment, household income, disposable income, and recreation spending than state and national benchmarks, residents demonstrate a relatively strong commitment to recreation spending. Beyond the local market, population size, household incomes, and recreation spending increase considerably across the 90- and 240-minute drive-time catchments, providing access to more than 17 million residents and a significantly stronger spending base. Continued population growth throughout these catchment areas further expands Shocker Park's long-term market potential. Combined with the park's strategic location along major transportation corridors and improving hotel inventory, these regional characteristics enhance its ability to attract tournaments and visitors from outside the immediate area. Overall, the findings suggest that future investments should balance the needs of local residents with opportunities to capture regional demand, strengthening Shocker Park's role as both a community recreation asset and a regional sports tourism destination.



Executive Summary

Existing Park Operations

The analysis indicates that while Shocker Park serves as an important community softball facility with consistent local demand, its current configuration limits its ability to compete for larger regional tournaments and maximize its economic impact. Stakeholder feedback consistently identified expanding the complex to at least eight diamonds, improving restrooms, parking, field conditions, and player amenities as the highest priorities. These capital and operational improvements would strengthen Shocker Park's position within Florida's competitive youth sports market while supporting growing local recreation demand. Increased tournament capacity and enhanced visitor amenities would help restore and expand non-local visitation, generating greater economic impact for Marion County. Overall, the findings demonstrate that a coordinated strategy of facility expansion and operational modernization would create a more sustainable, high-performing sports complex capable of serving both community recreation and regional sports tourism objectives.

Shocker Park Booking Priority		
Priority Level	Group Type	Notes
1	Contracted League	-Leagues must submit schedules 14 days before season starts
2	Tournaments & Large Events	-Approval is contingent upon field availability and capacity
3	Standard Rentals	-Includes team practices, camps, clinics, and private training

Source: Marion County, Johnson Consulting

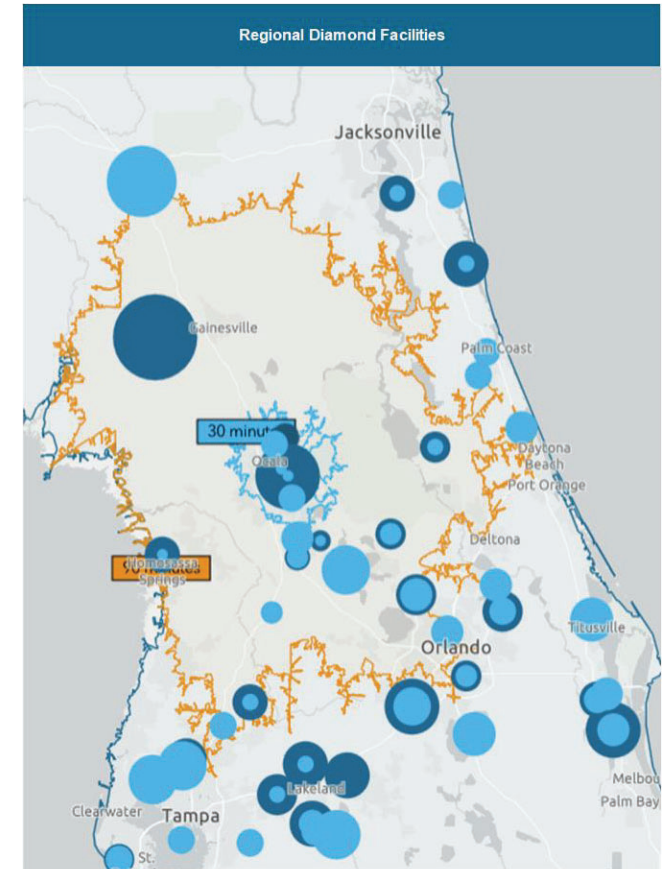
Executive Summary

Competitive Landscape

The competitive supply analysis indicates that Shocker Park operates within a highly concentrated sports facility market, making it difficult to compete directly with other large facilities. While the area's hotel inventory is increasing, the market's ability to support overnight visitors and future tournament growth will rely on continued collaboration with local hospitality and tourism partners. Rather than competing with larger multi-sport complexes throughout Central Florida, Shocker Park is well positioned to capitalize on its unique concentration of softball-exclusive diamonds. This specialization provides a meaningful opportunity to differentiate the park and attract softball tournaments with fewer competing venue options. Future investments should therefore focus on strengthening Shocker Park's niche as a premier softball destination through targeted facility improvements and programming strategies that reinforce this competitive advantage. Collectively, these findings suggest that a focused specialization strategy offers a stronger path to long-term success than attempting to match the scale and diversity of larger regional sports complexes.

Industry Trends

The industry analysis indicates that youth sports tourism continues to represent a growing opportunity, driven by the expansion of travel-based competition and increasing athlete specialization. Successfully attracting sports tourism depends not only on facility size, but also on strategic location, high-quality amenities, effective management, and partnerships that enhance a venue's regional or national profile. While baseball participation has declined nationally, softball has remained comparatively resilient, and Marion County continues to demonstrate strong local demand for diamond sports. These trends suggest that future investments at Shocker Park should emphasize high-quality softball facilities and tournament-support amenities that capitalize on the park's existing strengths while positioning it to potentially capture regional sports tourism demand.



Source: Relevant Facilities, Esri, Johnson Consulting

Executive Summary

Competitive Landscape

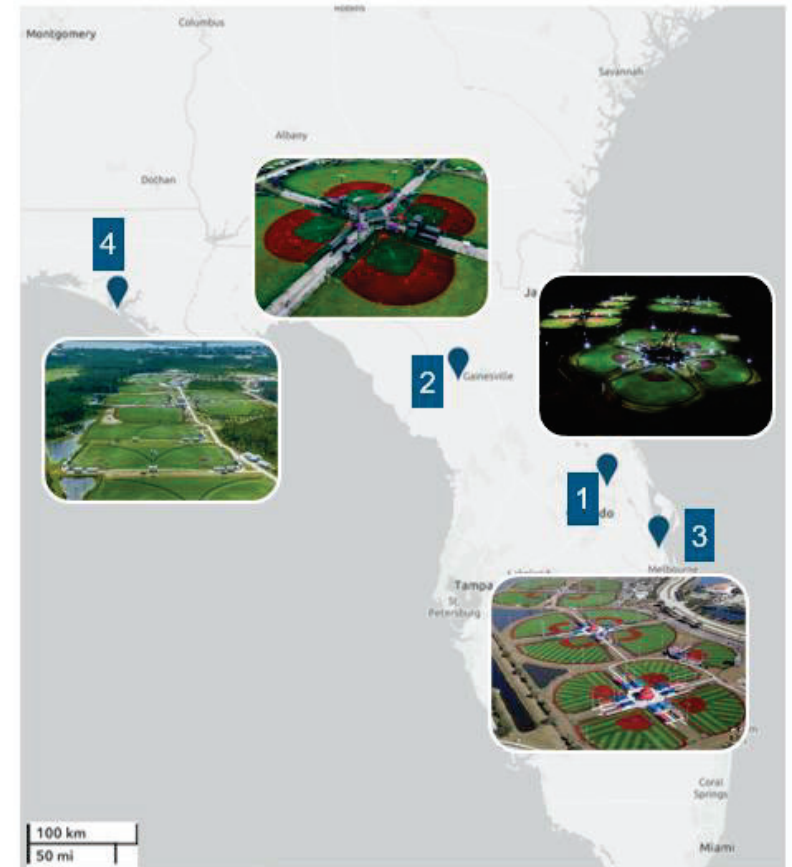
The case study analysis demonstrates that the nation's leading sports tourism complexes succeed by balancing community recreation with large-scale tournament programming, maximizing facility utilization throughout the week. Beyond high-quality fields and amenities, the findings highlight that effective facility management is essential for maintaining strong relationships with tournament organizers, sustaining operations, and ensuring long-term economic impact. The case studies also illustrate that public oversight and accountability, whether through direct municipal management or closely monitored partnerships with private operators, play a critical role in preserving facility quality and performance.

Equally important, surrounding hotels, restaurants, retail, and entertainment significantly influence the economic benefits generated by sports tourism by encouraging visitors to stay and spend within the local community. Compared to more rural facilities, Shocker Park benefits from a stronger surrounding commercial environment that is better positioned to capture visitor spending and support tournament activity. Collectively, these findings suggest that future investments should prioritize not only facility improvements but also high-quality management practices and strategic integration with the surrounding hospitality and retail markets to maximize both community value and regional economic impact.

Case Studies



Johnson Consulting



Executive Summary

High Level Cost Estimates and Phasing Strategies

Both quantitative and qualitative data indicate that Shocker Park has significant potential to better serve both the growing Marion County community and the regional sports tourism market through strategic expansion and facility improvements. As summarized in the figure on the right, Johnson Consulting recommends implementing the proposed improvements through a three-phase capital investment strategy totaling approximately \$13.7 million. This phased approach allows Marion County to prioritize investments that generate the greatest near-term return while establishing a long-term roadmap for enhancing both community recreation opportunities and regional sports tourism.

- **Phase 1 (1–2 Years)** represents the highest-priority investments, totaling approximately **\$7.75 million**, and focuses on improvements that will have the greatest immediate impact on tournament attraction and visitor experience. Key investments include the addition of two synthetic softball diamonds, including a championship field with permanent seating, park-wide lighting, a new paved parking lot, restroom and concession renovations, upgraded field conditions, expanded batting cages, improved fencing, stormwater infrastructure, and ADA accessibility improvements.
- **Phase 2 (3–5 Years)** includes approximately **\$900,000** in visitor-focused enhancements designed to elevate the overall guest experience, such as a new playground and streaming technology.
- **Phase 3 (5–10 Years)** represents the County's long-term vision for the facility with approximately **\$5.1 million** in additional capital improvements. Improvements include: synthetic turf conversion and an expanded shade and gathering spaces.

Shocker Park Upgrades and Phasing	
Phase 1 (1-2 Years)	Cost
-Add two synthetic diamonds	\$3,500,000
-One championship w/ 500 seats minimum	
-Lighting for Entire Park	\$1,000,000
-Renovate and add Bathrooms/Concessions	\$1,550,000
-Fencing: Replace and Install temporary (6ft height minimum)	\$100,000
-Add 3 more batting cages	\$25,000
-Upgrade existing fields	\$300,000
-Surface parking lot	\$1,500,000
-Stormwater Facilities	\$750,000
-ADA	\$225,000
Phase I Total	\$8,950,000
Phase 2 (3-5 Years)	
-New playground	\$750,000
-Add streaming technology	\$150,000
Phase II Total	\$900,000
Phase 3 (5-10 Years)	
-Shade Space/Vendor Village Area	\$75,000
-Renovate existing six fields to synthetic	\$4,000,000
Phase III Total	\$4,075,000
All Phases Total	\$13,925,000

Source: Johnson Consulting, Marion County Parks & Recreation

Executive Summary

Incremental Economic Impact & TDT Eligibility

The Phased investment strategy is projected to increase sports tourism visitation and direct visitor spending at Shocker Park. Phase 3 is projected to bring \$8.7 million in total daily spend up from the historic (2025) levels of \$1.8 million. Historical data shown in the table to the right was modeled after park usage data from 2025. This increase in visitation leads to a subsequent increase in overnight lodging demand throughout the county. Annual direct visitor spending is estimated to increase from roughly \$1.8 million today to \$8.9 million following phase 3 while total spending is expected to increase from \$2.9 million to \$14.6 over that same period.

Shocker Park Estimated Local Economic and Fiscal Impacts (\$000)					
		Historical	Phase 1	Phase 2	Phase 3
Direct Spending (\$000)					
1	Total Direct Spending	\$1,781	\$3,790	\$5,849	\$8,790
Economic Impact (\$000)					
	<i>Multipliers</i>				
2	Direct Spending	\$1,781	\$3,790	\$5,849	\$8,790
3	Indirect Spending	0.2216	395	840	1,296
4	Induced Spending	0.4349	774	1,648	2,544
5	Total Spending	\$2,949	\$6,278	\$9,690	\$14,561
6	Increased Earnings	0.3510	\$625	\$1,330	\$2,053
7	Employment (FTE jobs)	9.224	16	35	54
Fiscal Impact (\$000)					
	<i>Tax Rates</i>				
Sales Tax					
8	State Sales Tax	6.00%	\$62	\$132	\$203
9	County Sales Tax	1.50%	16	33	51
10	Total Sales Tax	7.50%	\$78	\$165	\$254
Hotel Occupancy Tax					
11	Tourist Development Tax (Bed Tax)	4.00%	\$30	\$64	\$98
12	Total Hotel Occupancy Tax	4.00%	\$30	\$64	\$152
Corporate Income Tax					
13	Corporate Income Tax (c)	5.50%	\$16	\$35	\$53
14	Total		\$16	\$35	\$80
15	Total Fiscal Impacts		\$124	\$263	\$406

a) Corresponding with Marion County Parks & Rec existing operational cost

b) Corresponding to the Shocker Park direct spending estimates for tournament visitors, Line 1.

c) Assuming that 10% of total spending goes to taxable corporate income of vendors.

Source: Johnson Consulting

An aerial photograph of a baseball complex. In the center is a large, multi-story building with a dark roof, likely a clubhouse or administrative building. Surrounding this central building are four baseball fields arranged in a 2x2 grid. Each field has a brown infield and green outfield. A paved path runs through the center of the complex, connecting the fields and the central building. To the right of the central building, there are several smaller structures, including a large white shed and a smaller building. The entire complex is surrounded by a dense line of green trees. The text "2.1 Market Assessment" is overlaid on the left side of the image, with a vertical line to its left.

2.1 Market Assessment

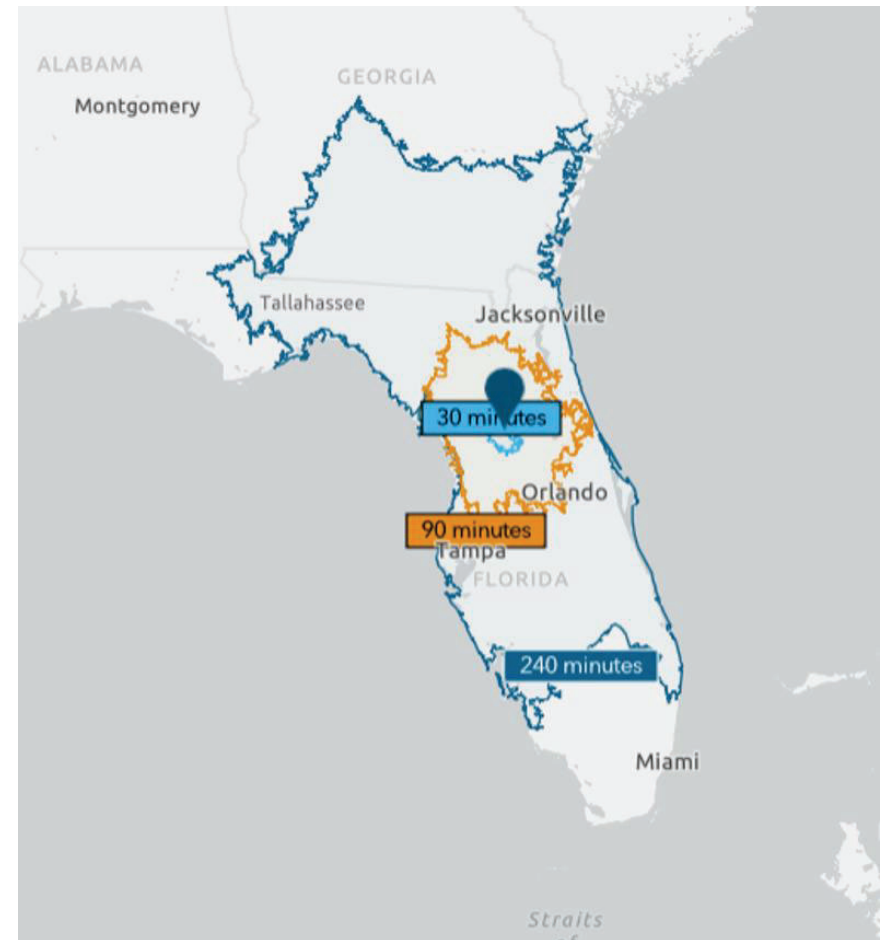
Overview

Marion County is located in central Florida approximately 40 Miles south of Gainesville and 75 miles north of Orlando. The county is situated along a key travel corridor on I-75 between Gainesville, Orlando, Tampa, Jacksonville, and Tallahassee. While highway travel serves as the primary means of access for most visitors, Marion County is accessible via multiple modes of transportation:

Highway: I-75 runs directly through Marion County. This major north-south interstate connects the area to Gainesville to the north and Tampa to the south while providing access to Orlando via Florida's Turnpike. Shocker Park is located about an 8-mile drive from I-75's Exit 350. US Route 441 intersects State Road 40 in Ocala providing major road access to other parts of the state.

Air: While Gainesville has the closest regional airport, it has a limited number of regularly scheduled flights. Located approximately 70 miles southeast of Marion County, Orlando Sanford International Airport (SFB) is the closest international airport to Shocker Park. SFB has more than 60 direct flight locations and had 1,412,954 enplanements in 2024 making it the 89th busiest in the country. Orlando International Airport and Tampa International Airport are located approximately 90 and 100 miles away, respectively.

As shown in the map on the right, the 30-, 90-, and 240-minute (4-hour) drive time catchment areas include major metro areas like Jacksonville, Tampa, Orlando, Tallahassee, and Gainesville.



Population

As of 2025, the population within Shocker Park's 30-minute drive-time catchment was 255,363. The broader 90-minute-plus drive-time catchments had populations ranging from 2,643,680 to 17,628,630. Encompassing more than 17.6 million residents, the 240-minute drive-time catchment alone would rank as the fourth-largest state in the United States by population, illustrating the scale of the regional market accessible through automobile travel. Between 2010 and 2025, population growth within Shocker Park's drive-time catchments ranged from 1.5 to 1.7 percent per annum, exceeding both the national average and the growth rate of Florida.

From 2025 to 2030, population growth within Shocker Park's drive-time catchments is forecast to range from 1.2 to 1.6 percent per annum, continuing to outpace projected national and state population growth. Continued growth throughout the regional market increases the number of residents within Shocker Park's potential service area.

Historic, Current, and Forecasted Population						
	2000	2010	2025	2030	CAGR* 2010-2025	CAGR* 2025-2030
USA	281,421,906	308,745,538	339,887,819	347,149,422	0.6%	0.4%
Florida	15,982,378	18,801,310	23,027,836	24,297,976	1.4%	1.1%
Marion County, FL	258,916	331,298	416,181	446,872	1.5%	1.4%
Ocala, FL	47,847	56,778	68,445	72,809	1.3%	1.2%
Shocker Park (30-Minute Drive Time)	165,488	205,107	255,363	275,803	1.5%	1.6%
Shocker Park (90-Minute Drive Time)	1,594,287	2,038,359	2,643,680	2,853,501	1.7%	1.5%
Shocker Park (240-Minute Drive Time)	11,701,720	14,137,524	17,628,630	18,753,938	1.5%	1.2%

*Compounded Annual Growth Rate

Note: Drive-time from Shocker Park

Sources: Esri BAO, Johnson Consulting

Age

Age is an important demographic indicator to consider when evaluating a market. Age composition often corresponds with recreation preferences, sports participation patterns, facility utilization, and demand for community programming.

While Marion County has an older age profile than both the state and nation, the City of Ocala features a younger demographic. The median age in Ocala is 40.1 years, compared to 50.7 years in Marion County. Ocala's median age is also more closely aligned with national benchmarks than with Florida overall, reflecting a younger population profile than is typical across the state. The broader regional market surrounding Shocker Park also reflects a younger demographic profile than Marion County itself. Within the 30-, 90-, and 240-minute drive-time catchment areas, the 2025 median ages are 44.5 years, 44.9 years, and 43.4 years, respectively.

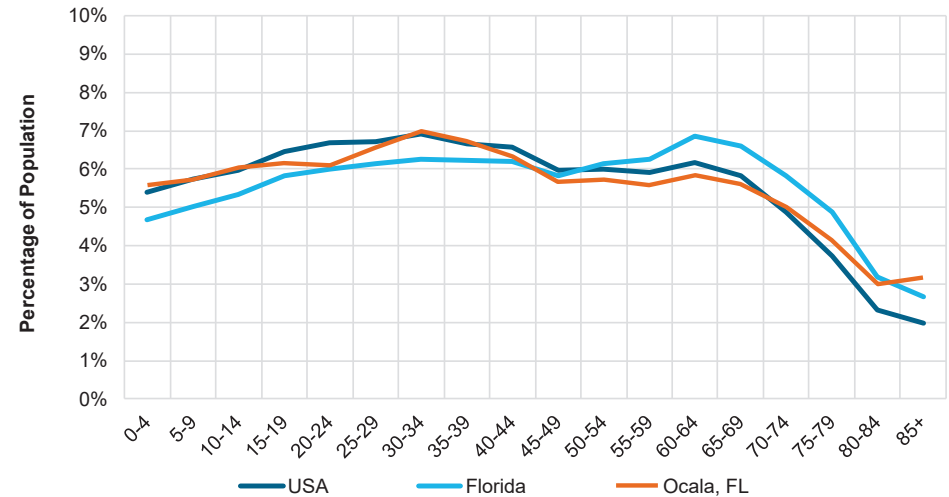
Age distribution data further illustrate these differences. Children under the age of 15 account for 17 percent of Ocala's population, compared to 14 percent in Marion County, while residents aged 60 and older represent 21 percent of the city's population compared to 31 percent countywide. These distribution characteristics align with a higher concentration of families and younger residents within Ocala than in the county overall.

Historic, Current, and Forecasted Median Age

	2010	2025	2030	CAGR* 2010-2025	CAGR* 2025-2030
USA	37.1	39.6	40.5	0.4%	0.5%
Florida	40.8	43.6	44.5	0.4%	0.4%
Marion County, FL	47.3	50.7	50.9	0.5%	0.1%
Ocala, FL	38.3	40.1	41.1	0.3%	0.5%
Shocker Park (30-Minute Drive Time)	42.6	44.5	45.4	0.3%	0.4%
Shocker Park (90-Minute Drive Time)	42.0	44.9	46.0	0.4%	0.5%
Shocker Park (240-Minute Drive Time)	40.7	43.4	44.4	0.4%	0.5%

*Compounded Annual Growth Rate
 Note: Drive-time from Shocker Park
 Sources: Esri BAO, Johnson Consulting

Age Distribution



Sources: Esri BAO, Johnson Consulting

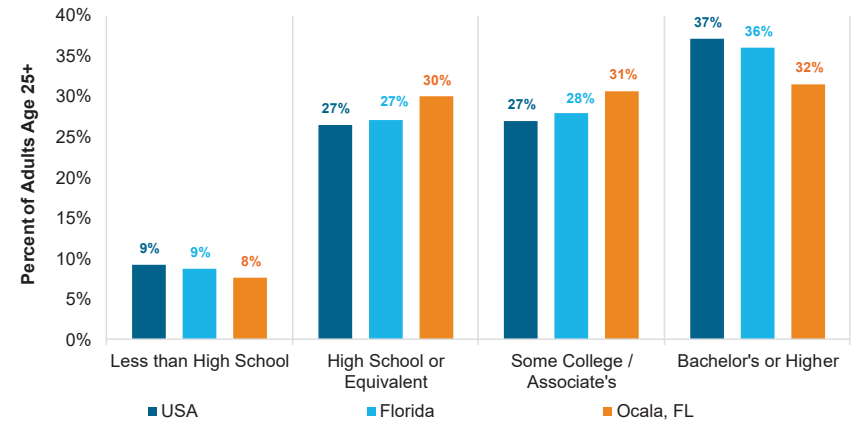
Education & Income

Education and income, although not strict predictors of sports, recreation, and entertainment facility performance, are important market attributes for benchmarking the level of potential activity. Markets with higher educational attainment and income levels are more likely to have a robust economic base and healthy educational system, which are key components of ensuring long-term growth and resiliency. Well-educated, higher-income markets have a significant advantage when it comes to attracting new businesses and are also more likely to have the nightlife, retail, and tourism products that appeal to event planners.

As shown in the chart in the top right, educational attainment in Ocala trails state and national benchmarks, particularly at the Bachelor's degree level, where only 32 percent of adults hold a Bachelor's degree or higher compared to 36 percent statewide and 37 percent nationally.

The 2025 median household income in Marion County is \$61,917 and the City of Ocala stands at \$57,988, both falling significantly below the state average of \$78,205 and the national average of \$81,624. Median household income increases across the broader 90- and 240-minute drive-time catchment areas, indicating the presence of higher-income communities beyond the immediate local market. While local growth rates of 2.1 to 2.2 percent trail state and national trends, facility improvements may provide an opportunity to attract visitors from these higher-income communities while continuing to serve local residents.

2025 Educational Attainment



Sources: Esri BAO, Johnson Consulting

Median Household Income

	2025	2030	CAGR*
USA	\$81,624	\$92,476	2.5%
Florida	\$78,205	\$89,997	2.8%
Marion County, FL	\$61,917	\$68,595	2.1%
Ocala, FL	\$57,988	\$64,686	2.2%
Shocker Park (30-Minute Drive Time)	\$62,618	\$69,585	2.1%
Shocker Park (90-Minute Drive Time)	\$71,058	\$81,058	2.7%
Shocker Park (240-Minute Drive Time)	\$76,175	\$86,930	2.7%

*Compounded Annual Growth Rate

Note: Drive-time from Shocker Park

Sources: Esri BAO, Johnson Consulting

Regional Sports Spending

The chart below compares disposable income and spending on entertainment and sports-related activities across Marion County, the City of Ocala, and the surrounding drive-time catchment areas. Both Marion County and Ocala trail state and national averages across most spending categories. Lower absolute spending levels generally correspond with lower disposable incomes, as Marion County reports a median disposable income of \$52,850 and Ocala stands at \$50,248, compared to \$64,912 statewide and \$66,259 nationally. Ocala residents allocate a slightly larger share of their disposable income to recreation than Marion County residents overall, spending 1.0 percent on sports-related activities compared to county averages of 0.9 percent. Despite lower local incomes, spending on admission to sports events, fees for recreation lessons, and club memberships in Ocala is comparable to levels within the surrounding 30- and 90-minute drive-time catchment areas. Spending capacity increases across the broader regional market as disposable incomes rise. However, the 30-minute drive-time catchment records a sports spending index of 86, indicating sports-related spending levels below state and national benchmarks and suggesting a more price-conscious local market. Sports spending indices increase across the broader drive-time catchment areas. Within the 240-minute drive-time catchment area surrounding Shocker Park, median disposable income reaches \$62,910 and sports spending approaches national benchmarks, indexed at 95 percent of the national average.

Disposable Income and Average Sports Spending

	Median Disposable Income	Fees for Participant Sports	Admission to Sports Events	Fees for Recreation Lessons	Membership Fees-Social/Rec/Health Clubs	% of Disposable Income Spent on Sports	Index of Disposable Income Spent on Sports
USA	\$66,259	\$166	\$92	\$167	\$317	1.1%	100
Florida	\$64,912	\$162	\$87	\$153	\$299	1.1%	97
Marion County, FL	\$52,850	\$122	\$64	\$99	\$215	0.9%	85
Ocala, FL	\$50,248	\$116	\$67	\$105	\$218	1.0%	90
Shocker Park (30-Minute Drive Time)	\$52,926	\$122	\$67	\$103	\$218	1.0%	86
Shocker Park (90-Minute Drive Time)	\$59,166	\$143	\$77	\$124	\$256	1.0%	91
Shocker Park (240-Minute Drive Time)	\$62,910	\$157	\$85	\$142	\$283	1.1%	95

**Where 100 is average, 110 is 10% above average, and 90 is 10% below average

Note: Drive-Time from Shocker Park

Sources: Esri, Johnson Consulting

Employment

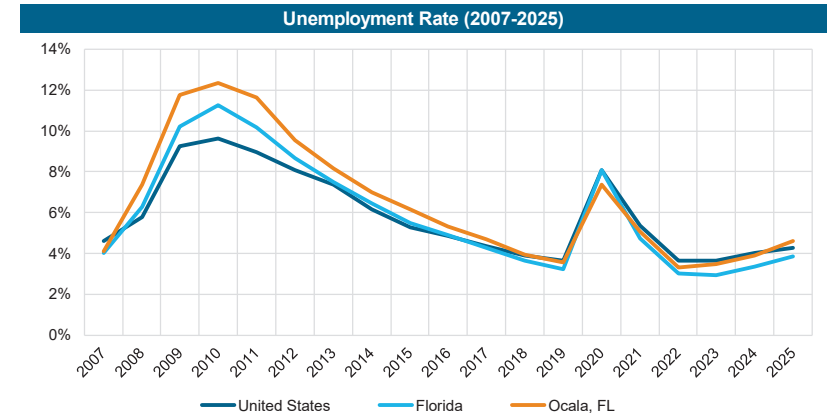
A strong employment base can contribute to the success of sports, recreation, event, and entertainment facilities by generating disposable income, attracting residents, and supporting sponsorship, advertising, and event activity. Marion County's employment base is anchored by a diverse mix of education, healthcare, government, manufacturing, and distribution employers.

Marion County Public Schools is the county's largest employer with 6,306 total employees, followed by AdventHealth Ocala and HCA Florida Hospitals. Government entities also represent a significant share of local employment, while employers such as FedEx Ground, Lockheed Martin, E-ONE, Chewy, and Cardinal Glass Industries contribute to the county's manufacturing and logistics sectors. The presence of these large corporate and healthcare entities correlates with potential corporate partnership opportunities, as these major employers represent prospects for naming rights or sponsorships for a new field.

While Ocala experienced a temporary increase in unemployment during the COVID-19 pandemic, unemployment rates have since declined. Since a post-pandemic low in 2022, Ocala's unemployment rates have steadily increased along with that of the nation and state. In 2025, Ocala's unemployment rate was approximately 4.6 percent, compared to 3.9 percent statewide and 4.3 percent nationally.

Top Employers for Ocala	
Employer	Employees
Marion County Public Schools	6,306
AdventHealth Ocala	3,606
HCA Florida Hospitals	3,171
Walmart	2,689
State of Florida	2,600
Publix Super Markets	2,257
FedEx Ground	1,500
Marion County Board of County Commissioners	1,368
City of Ocala	1,134
Lockheed Martin	1,100
E-ONE, Inc.	1,000
Chewy	867
Custom Window Systems	750
Marion County Sheriff's Office	750
U.S. Government	700
Cardinal Glass Industries	475
College of Central Florida	450

Source: Ocala Metro Chamber & Economic Partnership, Johnson Consulting



Sources: Bureau of Labor Statistics, Johnson Consulting

Economic Clusters

As of 2025, the two largest industry sectors by total employment in the City of Ocala are Health Care and Retail Trade, which together account for approximately 29 percent of the local workforce. The top five industries with the most employees are:

- Health Care
- Retail Trade
- Accommodation/Food Services
- Educational Services
- Professional/Tech Services

The table provides a location quotient analysis of employment in Ocala by industry sector relative to the United States as a whole. Location quotients of 1.0 indicate a similar relative concentration of an industry, while values above 1.0 indicate a higher local concentration and values below 1.0 indicate a lower concentration. Ocala reports elevated concentrations in Accommodation/Food Services and Real Estate, both with location quotients of 1.5, as well as Utilities, Admin/Waste Management, Public Administration, and Retail Trade relative to national averages.

Number of Employees and Location Quotient by Industry Sector					
Sector	Ocala, FL		United States		Location Quotient
	# of Employees	% of Workforce	# of Employees	% of Workforce	
Health Care	4,631	16%	24,278,285	14%	1.1
Retail Trade	3,699	13%	17,402,082	10%	1.2
Accommodation/Food Svcs	2,776	10%	11,070,283	7%	1.5
Educational Services	2,300	8%	15,710,947	9%	0.9
Professional/Tech Svcs	1,906	7%	14,048,795	8%	0.8
Construction	1,822	6%	11,691,394	7%	0.9
Public Administration	1,779	6%	8,451,509	5%	1.2
Admin/Waste Mgmt	1,750	6%	7,614,480	5%	1.3
Manufacturing	1,585	6%	16,045,557	10%	0.6
Finance/Insurance	1,428	5%	8,142,627	5%	1.0
Other Services	1,339	5%	7,889,471	5%	1.0
Transportation	1,071	4%	8,347,906	5%	0.8
Real Estate	692	2%	2,796,722	2%	1.5
Wholesale Trade	607	2%	3,261,622	2%	1.1
Arts/Entertainment/Rec	453	2%	3,695,292	2%	0.7
Utilities	351	1%	1,506,012	1%	1.4
Information	193	1%	3,056,154	2%	0.4
Agriculture	163	0.6%	1,809,303	1%	0.5
Management	13	0.0%	260,253	0.2%	0.3
Mining	11	0.0%	551,845	0.3%	0.1
Total Employees	28,569		167,630,539		

Sources: Esri BAO, Johnson Consulting

Hotel Market

Data from CoStar, which is an independent hotel research firm whose statistics are widely used in the industry, indicates that within a 15-minute drive from Shocker Park, there are six non-economy class hotels with a total of 524 rooms. The largest hotel by number of rooms is the Equus Inn, which has 152 Midscale rooms. Hilton Garden Inn Ocala Downtown was the hotel with the second largest number of rooms (107) and the most meeting space at 5,936 SF.

Additionally, there are four hotels under construction or in final planning within a 15-minute drive time of Shocker Park, totaling an additional 497 rooms. The table on the bottom right shows the pipeline of hotels entering the Marion County. These hotels are noticeable higher in class than the existing hotels currently within a 15-minute drive time catchment.

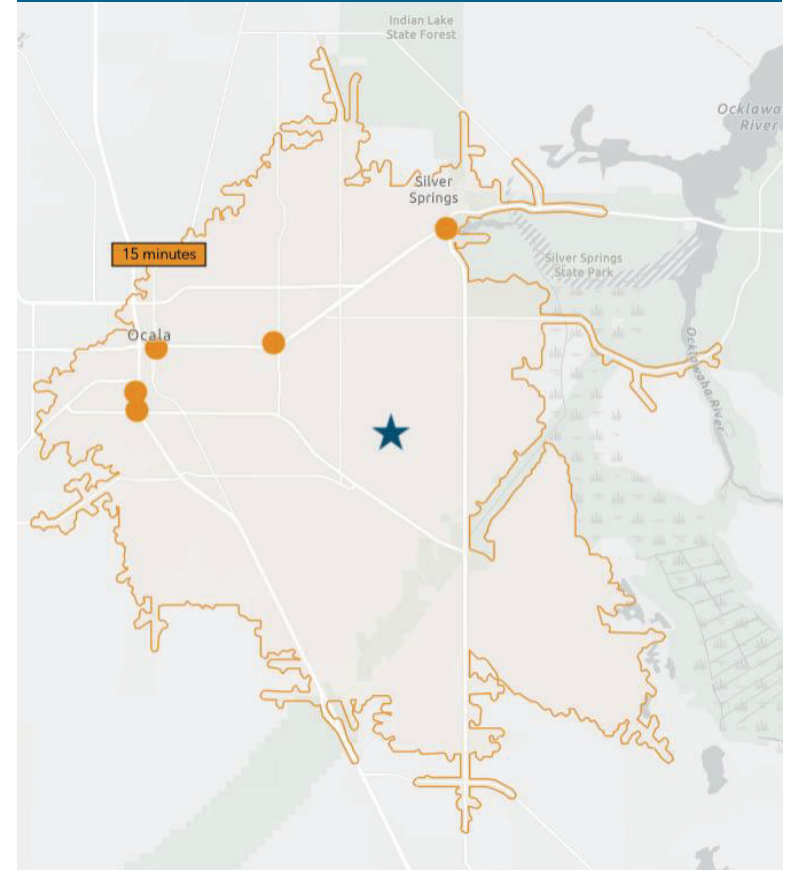
Shocker Park Area Hotel Event Facility Inventory 15-Minute Drive from Shocker Park					
Hotel	Class	Year Built (Renovated)	Rooms	Largest Meeting Space (SF)	Total Meeting Space (SF)
Equus Inn	Midscale	1987 (2021)	152		
Hilton Garden Inn Ocala Downtown	Upscale	2020	107	2,940	5,936
avid hotel Ocala Downtown	Midscale	2022	95		
Holiday Inn Express & Suites Silver Springs-Ocala	Upper Midscale	2007 (2019)	75	625	625
Comfort Inn Ocala Silver Springs	Upper Midscale	1995 (2018)	55	720	720
Baymont by Wyndham Ocala Suites	Midscale	2021	40		
Total			524	4,285	7,281
<i>*Excludes economy class hotels</i>					
<i>Sources: CoStar, Johnson Consulting</i>					

Shocker Park Regional Hotel Pipeline					
Property Name	Hotel Class	Rooms	City	Phase	Opening
Hotel Marion Ocala, Tapestry Collection by Hilton	Upper Upscale	55	Ocala	Under Construction	2026
AC Hotel Ocala	Upscale	185	Ocala	Under Construction	2027
Element Ocala	Upscale	129	Ocala	Final Planning	2028
Home2 Suites by Hilton Silver Springs Ocala	Upper Midscale	128	Silver Springs	Under Construction	2027
Total		497			
<i>*15-Min drivetime around Shocker Park</i>					
<i>Sources: CoStar, Johnson Consulting</i>					

Hotel Inventory Map (100+ Rooms)

The map to the right shows the concentration of hotels with 100 or more rooms within a 15-minute drive time catchment of Shocker Park. The areas that have the highest concentration of large hotels are on state route 301, roughly a 12-minute drive from the park. Additionally, just outside of the 15-minute drive time catchment there are several hotel clusters along I-75. While just outside the 15-minute drive time, this does provide a significant increase in adjacent rooms for Shocker Park.

Shocker Park 15-Minute Hotel Inventory

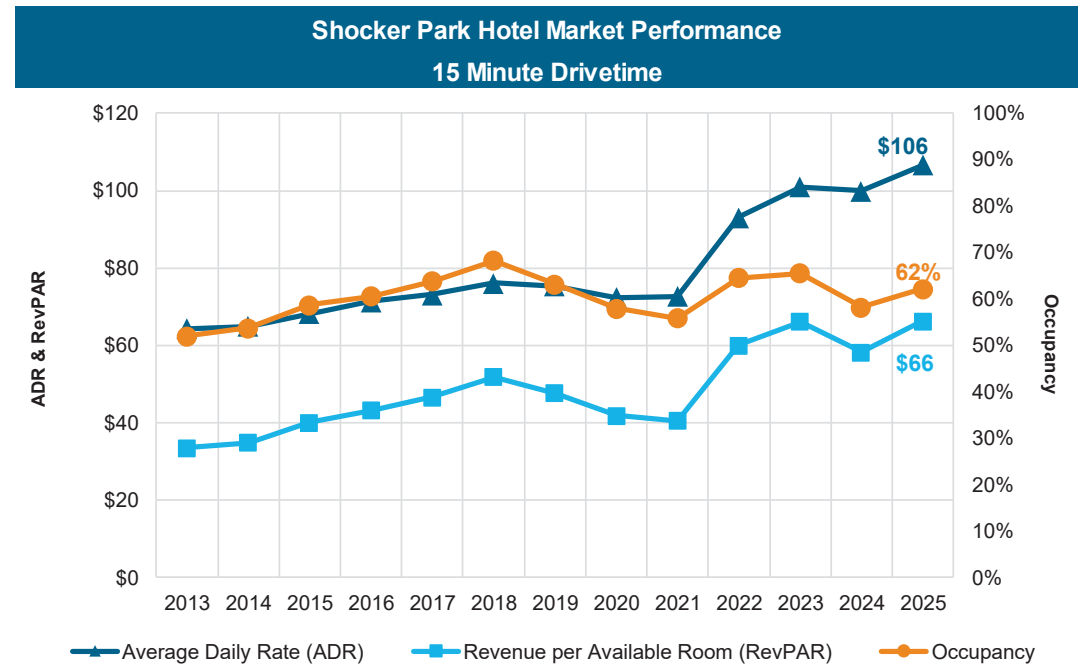


*15-Minute drive time from Shocker Park

Source: Esri, CoStar, Johnson Consulting

Hotel Market

The hotel market follows trends unlike that of many across the nation. While many markets saw slight increases in growth in ADR and RevPAR before 2020 followed by drastic decreases during the pandemic. The 15-minutes around Shocker Park saw a steady decline in ADR and RevPAR from 2018-2021. The COVID-19 pandemic's effects on this hotel market are not easily discernable from the chart to the right. The hotel markets did have an increase in ADR and RevPAR from 2021 to 2022. 75 percent of the inventory's current hotel room inventory was built or renovated in 2020-2022, vastly improving the area's quality and total availability of hotel rooms. The 15-minute drivetime around Shocker Park's hotel inventory increased in both RevPAR and ADR since 2022.



Sources: CoStar, Johnson Consulting

Implications

The demographic and economic characteristics surrounding Shocker Park present both challenges and opportunities for its future development as a regional sports tourism destination. Within the immediate 30-minute market, residents are generally older, household incomes and disposable income trail state and national averages, and educational attainment is comparatively lower. While these factors suggest that affordability should remain an important consideration when planning future capital improvements, programming, and user fees, local residents also dedicate a relatively strong share of their discretionary income to recreation, demonstrating an established demand for quality recreational amenities despite more modest income levels.

Beyond the immediate market, however, the opportunity expands considerably. Population, household income, and recreation spending increase significantly throughout the broader 90- and 240-minute drive-time catchments. The four-hour drive market encompasses more than 17 million residents with a median household income exceeding \$76,000, providing access to a substantially larger and more affluent visitor base capable of supporting destination-oriented tournaments and sports tourism activity.

Collectively, these findings reinforce Shocker Park's dual role as both a community recreation asset and a regional tourism destination. While future investments should continue to serve the needs of Marion County residents through affordable access and local programming, the facility's greatest opportunity for economic growth lies in attracting visitors from the broader regional market. Capital improvements that enhance tournament competitiveness, visitor experience, and event capacity position Shocker Park to leverage this larger market, increasing overnight visitation, visitor spending, and overall economic impact while maintaining its value as a year-round community resource.

An aerial photograph of a baseball park featuring four baseball fields arranged in a 2x2 grid. A central building with a dark, multi-tiered roof is situated between the fields. The infield areas are light brown, while the outfield grass is green. A paved path runs vertically through the center of the park, connecting the fields. To the right of the central building, there are several smaller structures, including a large white-roofed building and a smaller one with a brown roof. The park is surrounded by dense green trees on the left and right sides. The text "3 Existing Park Operations" is overlaid in white on the left side of the image, with a vertical line to its left.

3 Existing Park Operations

Park Overview

Shocker Park is in Ocala, FL approximately five miles from downtown Ocala. The park has six grass outfield dirt infield diamonds. The Park was constructed in 1997 when Marion County Parks & Recreation received a \$100,000 grant from the state. While the facility can accommodate baseball, the dirt infields and 200 foot fences make it ideal for softball events. Outside of just the fields, the park also has batting cages to facilitate softball/baseball activities. The park has several amenities for visitors to enhance everyday recreational and game day activities. These amenities include a concession stand, restrooms, a picnic pavilion, a playground, and a parking lot.

While the facility currently hosts tournaments every year, the existing number and quality of fields and amenities prevent Shocker Park from maximizing its community and economic impact. A grouping of six diamonds is not a sufficient inventory to attract larger tournaments, which often require a minimum of eight diamonds. Expanding the facility to include additional fields and amenities is possible as the current ballfields are located directly adjacent to 60 acres of undeveloped county-owned land. Such an expansion could potentially help the facility attract more tournaments and large events.

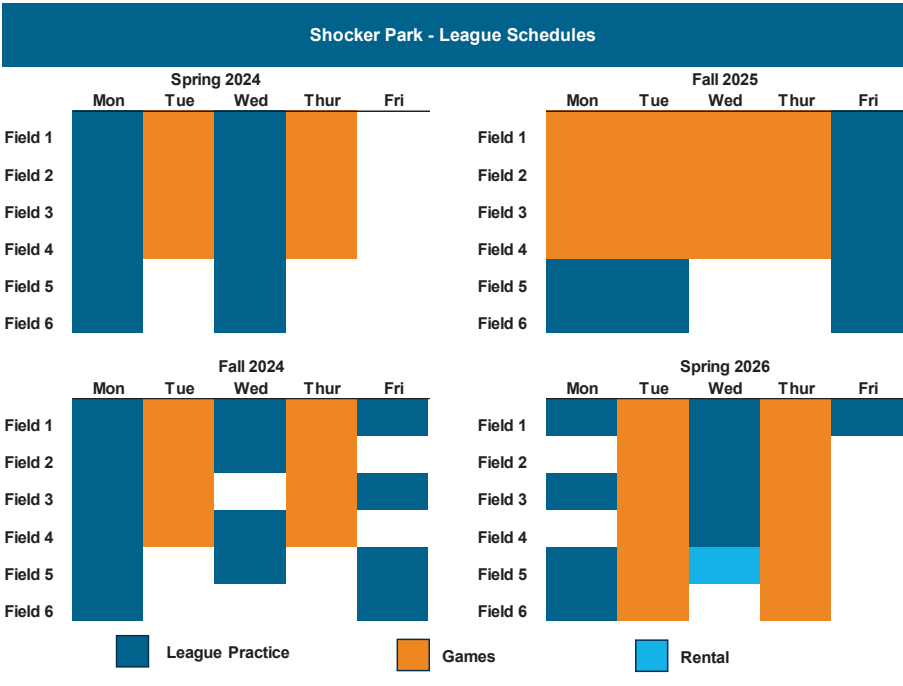
In addition to the total number of fields, the lack of sufficient restrooms, specifically women's restrooms, creates issues for park users and dissuades tournament organizers from selecting the park for repeat business. While the existing grass parking lot is usually sufficient for smaller community use, a paved and striped parking lot would allow the space to park more vehicles in the same footprint, if the park were to expand to being a regional Complex.



Event Overview

The chart to the right shows Ocala/Marion County Girls Softball (the League) schedules from Monday – Friday for various seasons. Ocala/Marion County Girls Softball is the park’s anchor tenant and oversees operations of the complex and thus gets priority use of the fields. According to the seasonal calendars, the complex is typically split between league practices on Mondays, Wednesdays and Fridays and games on Tuesdays and Thursdays. Spring 2026 is the first season since 2023 to include weekly rentals from an organization outside of Ocala/Marion County Girls Softball.

Currently, Shocker Park is not just used for regularly scheduled recreation activities but also brings in minimal visitation from the region due to outside tournaments. The chart in the bottom right shows a summary of the tournaments Shocker Park hosted in 2025. The complex had 10 tournaments that occurred on nine Saturdays and one Friday throughout the year. These events used an average of 5.5 diamonds per tournament and brought in a total of 292 teams.



*Spring defined as X-Y
**Fall defined as X-Y
Source: Marion County, Johnson Consulting

Shocker Park 2025 Tournament Recap		
# of Tournaments	Diamonds Used Per Tournament	Total # of Teams
10	5.5	292

Source: Marion County, Johnson Consulting

Operational Overview

While Shocker Park is owned by Marion County Board of County Commissioners and is operated by the Marion County Parks & Recreation Department, day to day programming and concessions management are overseen by the League. This League has an agreement to use the park in exchange for a \$20 per player per season fee. Local sports and recreation organizations helping to operate parks is common and allows that organization to serve as an anchor tenant. In the case of Shocker Park, Ocala/Marion County Girls Softball oversees daily programming and helps by striping the fields. The Marion County Parks & Recreation Department manages the turf, clay, and all other assets. Additionally, the League runs the Shocker Park concessions, allowing them to raise additional funds for their organization. The concessions stands and/or access to the concessions stands becomes vary important to the user experience for bigger tournament events, thus in this model the success of concessions may ebb over time, based on the success of the League’s volunteer base.

After maintenance of the fields, the Marion County Parks & Recreation Department has assessed contracted leagues like Ocala/Marion County Girls Softball as the top priority for booking at Shocker Park. The League must submit practice and game schedules to the County 14 days before season start. Once the submissions are reviewed, the County places these events in the schedule before any other request during the season. The second priority level is for tournaments and large events. The next level of booking priority goes towards standard rentals, which includes practices, camps, clinics and private training. These non-league events are allowed based on field condition and capacity. Rental prices for Shocker Park for tournaments are based off the three tiers of service that provide varying level of game day support and field maintenance.

Financial Overview

The chart to the right shows the Shocker Park Revenues and Expenses for 2025. The facility currently runs a \$94,528 Net Operating Loss.

Shocker Park Booking Priority		
Priority Level	Group Type	Notes
1	Contracted League	-Leagues must submit schedules 14 days before season starts
2	Tournaments & Large Events	-Approval is contingent upon field availability and capacity
3	Standard Rentals	-Includes team practices, camps, clinics, and private training

Source: Marion County, Johnson Consulting

Shocker Park Expenses and Revenues FY2025	
Revenues	\$20,648
Expenses	\$137,578
Net Operating Income	(\$116,930)

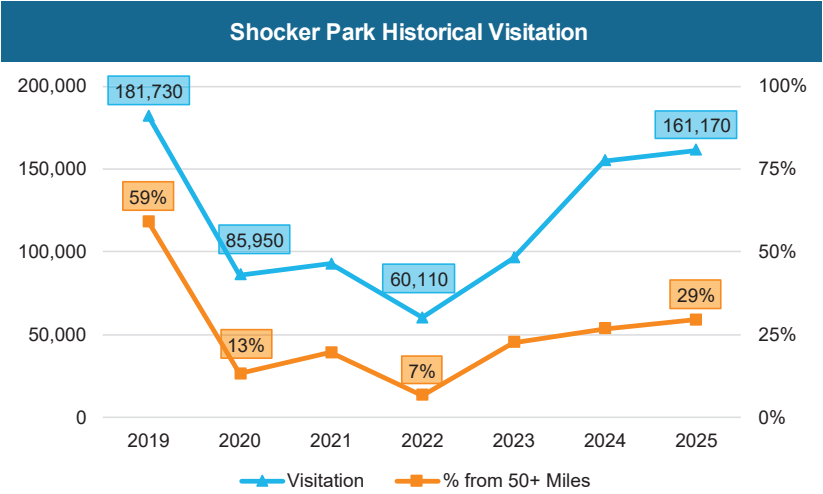
Sources: Marion County, Johnson Consulting

Historical Visitation Trends

Johnson Consulting utilizes a tool called Advan to track visitation to properties. Advan aggregates location data from users' mobile app usage. When a geographic polygon or radius is drawn in Advan's platform, a mobile user who spends time within that location is counted as one visit. This is aggregated into visitation trends and demographic trends. For our analysis of the comparable facilities, we excluded anyone who spent less than 15 minutes within Shocker Park's boundaries. The 2-4 staff members who operate the park during large tournaments are included in these visitation numbers.

The chart on the top right shows Shocker Park's yearly visits and percentage of non-local visitors (as shown by percentage of visitors from 50+ miles away) dating back to 2019. Both total visits and percentage of non-local visitors decreased drastically from 2019 to 2020, likely due to the decrease in programming from the COVID-19 pandemic. Unlike most parks and sports complexes, which saw an increase in visitation immediately following the pandemic, Shocker Park's visitation continued to decline reaching a six-year low in 2022 and has steadily increased since then. In 2025, visitation had increased to 161,170 visits, which was 89 percent of 2019 visitation. However, percentage of non-local visitors has had a more modest recovery. In 2025, the share of non-local visitors to Shocker Park is roughly half as much as it was in 2019.

Other statistics like average frequency and average dwell time have seen modest changes. Average frequency increased during the low-years of 2020-2022, indicating the park was used more for continuous local use. Average dwell time has progressively declined since 2019.



**Visitation numbers include staff used to operate events and large tournaments*

Source: Advan, Johnson Consulting

Shocker Park Historical Visitation					
Year	Visitation	Total Visitors	Average Frequency	Average Dwell Time	% from 50+ Miles
2019	181,730	19,590	9.28	112	59%
2020	85,950	8,400	10.23	108	13%
2021	92,720	9,540	9.72	107	20%
2022	60,110	4,780	12.57	103	7%
2023	96,280	8,870	10.85	99	23%
2024	154,850	18,590	8.33	101	27%
2025	161,170	16,660	9.67	103	29%
Pct Change (2019-2025)	-11%	-15%	+4%	-8%	-50%

**Visitation numbers include staff used to operate events and large tournaments*

Source: Advan, Johnson Consulting

Summary of Stakeholder Feedback

Johnson Consulting conducted 17 stakeholder engagement interviews with the organizations listed to the right. A comprehensive stakeholder engagement process was conducted to inform strategic planning for Shocker Park, incorporating in-depth interviews with key community leaders, park partners, event planners, and County stakeholders, along with targeted surveys of both current and prospective users. This outreach provided a balanced qualitative and quantitative understanding of how the facility is perceived today and how it could evolve in the future.

Several key themes related to current park challenges, potential facility enhancements, and operational restructuring emerged consistently throughout the stakeholder interviews. Although Shocker Park currently hosts tournaments, several factors limit its ability to attract larger, higher-impact events. The park's most significant constraint is its limited number of playing fields. Many tournament organizers require complexes to have a minimum of eight baseball or softball diamonds to accommodate their larger events, making Shocker Park ineligible with its current inventory of six diamonds. Expanding the facility by adding at least two additional diamonds would increase the total inventory to eight fields, significantly enhancing the park's ability to attract larger tournaments and generate additional visitation. Furthermore, given the area's rapid population growth, demand for recreational field space from local youth organizations, high schools, and colleges is expected to continue to increase. Expanding the park's field capacity would not only improve its competitiveness in the tournament market but also help meet growing local recreational needs.

- Athlete Parents
- Belleview High School Athletics
- Columbia County Sports Commission
- Marion County Administration
- Marion County Board of County Commissioners
- Ocala/Marion County Girls Softball
- Marion County Parks & Recreation
- Marion County Parks & Recreation Advisory Council
- Marion County Public Schools
- Ocala/Marion County VCB Staff
- Premier Girls Fast Pitch
- Southeastern Fast Pitch

Summary of Stakeholder Feedback

Currently, volunteers from Ocala/Marion County Girls Softball, Inc operate out of and program Shocker Park. While this arrangement reduces the programming burden on the County's Parks & Recreation Department, it also limits the department's ability to capture concession and other on-site revenues that could help support park operations. Additionally, relying on volunteers to operate Shocker Park concessions ties the facility's long-term success to volunteer availability and engagement, both of which can fluctuate over time.

Several facility improvements were consistently identified throughout stakeholder interviews, including renovated or additional restroom facilities, paved and striped parking, expanded shade areas, additional foul ball netting, higher outfield fences, and additional batting cages. While these improvements are less significant capital investments than expanding the park's inventory, they would enhance the overall user experience and improve the facility's functionality.

Among these recommendations, additional restroom facilities—particularly women's restrooms—were consistently identified as the highest priority. Given Shocker Park's frequent use by girls' fast-pitch softball organizations, the current shortage of women's restrooms creates congestion during tournaments and other large events. Expanding restroom capacity would improve the experience for participants and spectators and could serve as a competitive advantage when attracting softball tournaments, as adequate restroom facilities are an important consideration for many event organizers.

Another notable improvement identified through the stakeholder interviews is the facility's parking area. Currently consisting of an unpaved grass lot with minimal signage or parking striping, the existing parking configuration can lead to inefficiencies and confusion during high-attendance events. Developing a paved and striped parking lot would improve traffic flow, maximize parking capacity, and enhance the overall visitor experience. Adding two more fields would lead to a displacement of existing grass parking area. Furthermore, building a new parking lot may require creating a new entry off of SE 24th St. In addition, a formal parking area would create opportunities for additional event-related revenue, such as paid parking during tournaments, while also providing a more suitable space for food trucks and other event amenities.

Summary of Stakeholder Feedback

Several stakeholders mentioned amenities such as pickleball courts and a larger playground would diversify the park's recreational offerings while providing valuable attractions for families visiting the facility during tournaments. Pickleball has experienced rapid growth in participation across all age groups, particularly among older adults, making it an amenity with broad community appeal. A larger playground would serve as a family-oriented attraction during non-tournament periods while also providing entertainment for younger siblings of athletes attending tournaments. Similarly, expanding and modernizing the existing playground would enhance the park's attractiveness for local residents and increase its appeal as a family-friendly tournament destination. Together, these improvements would broaden the park's recreational offerings, encourage greater year-round community use, and enhance the overall visitor experience for tournament participants and spectators.

Field quality is a critical factor in attracting new tournaments, retaining existing events, and providing a high-quality recreational amenity for local residents. During stakeholder interviews, several concerns were raised regarding the current condition of Shocker Park's playing fields. The most frequently cited issues included uneven grading in the outfield, which presents potential player safety concerns, and the presence of fire ants throughout the field areas. Regrading the outfields to create more consistent playing surfaces and implementing measures to control fire ants would improve player safety, enhance the overall playing experience, and strengthen Shocker Park's competitiveness as a tournament venue. Stakeholders expressed mixed opinions regarding the installation of synthetic turf fields. While synthetic turf offers several advantages—including reduced routine maintenance, increased field durability, and improved drainage that can minimize weather-related cancellations—it also presents potential drawbacks. During Florida's hot summer months, synthetic surfaces can reach significantly higher temperatures than natural grass, raising heat-related concerns for athletes. Additionally, although synthetic turf can reduce annual maintenance costs, it represents a substantial long-term capital commitment, as the playing surface typically requires replacement approximately every 10 to 15 years. However, that being said, discussion with Parks & Recreation staff have suggested the newly installed synthetic turf field at Rotary Sportsplex has been well perceived by the various user groups as well as operational staff.

Summary of Stakeholder Feedback

Several stakeholders, particularly tournament rights holders, identified South Side Sports Complex in Lake City as one of the easiest facilities with which to schedule and host tournaments, citing its competitive bid fees, responsive management, and efficient booking process. The facility is 140 acres and 12 softball fields, 13 baseball fields and 9 soccer fields. Four of the twelve softball fields have 300 foot fences whereas the other eight have 200-foot fences. The county-owned and operated complex also maintains dedicated staff on-site during major tournaments to oversee operations and ensure events run smoothly. In addition to tournament activity, the facility is regularly used by local recreation organizations, resulting in high year-round utilization. Because of its larger inventory of playing fields, the complex is often able to accommodate large tournaments alongside local recreational programming with minimal scheduling conflicts. Stakeholders also noted that lease agreements with user groups help ensure concession operations remain consistently staffed, reducing reliance on volunteer availability. Adopting a similar operational model at Shocker Park could improve operational efficiency, enhance the tournament experience, and increase the park's capacity to host additional events. Based on stakeholder feedback and the facility's proposed improvements, Shocker Park could reasonably position itself to host approximately 25 tournaments annually under a comparable operating structure.

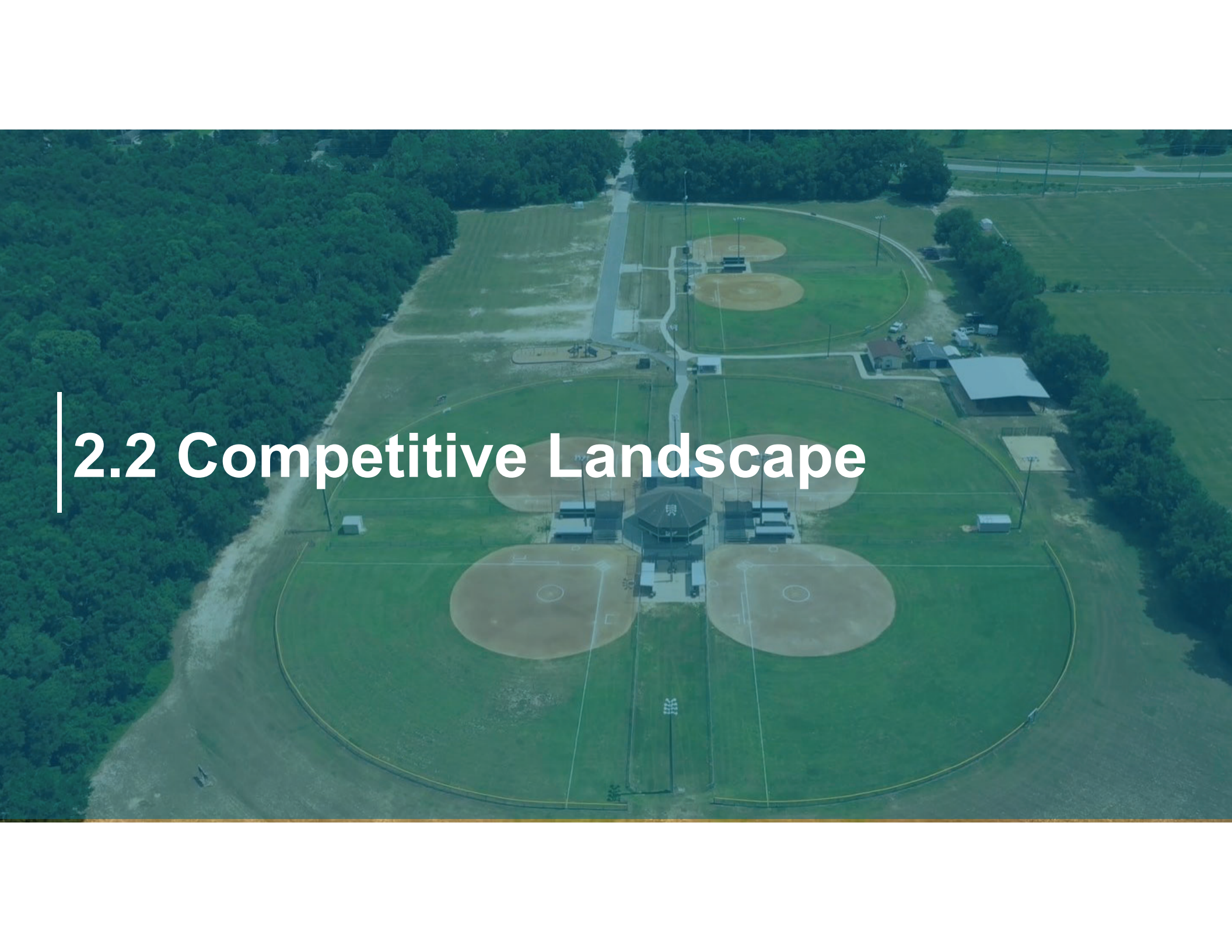
Implications

Current Park Operations

Shocker Park fulfills an important role as a community softball facility and demonstrates consistent demand from both local league play and regional tournaments. However, the facility's current configuration limits its ability to compete for larger, higher-impact events. The combination of only six diamonds, aging support amenities, limited restroom capacity, and unimproved parking constrains tournament growth despite the availability of adjacent county-owned land for expansion. Operationally, Ocala/Marion County Girls Softball provides a stable anchor tenant and effective day-to-day programming, but the league-first scheduling model reduces calendar flexibility for additional tournaments and outside rentals. Visitation trends indicate that while overall use has largely recovered from pandemic-era declines, the proportion of visitors traveling from outside the region remains well below pre-2020 levels, suggesting that Shocker Park has yet to regain its competitiveness as a regional tournament destination. Strategic capital improvements, coupled with enhancements to tournament-support infrastructure and scheduling flexibility, would better position the facility to attract larger events, increase non-local visitation, improve financial performance, and generate greater economic impact for Marion County.

Stakeholder Engagement

Stakeholder feedback indicates broad consensus that Shocker Park has the potential to evolve from a locally focused softball facility into a more competitive regional tournament destination through strategic capital improvements. Expanding the complex to at least eight diamonds, enhancing core infrastructure such as restrooms, parking, field conditions, and player amenities, and incorporating additional family-oriented amenities would address the highest-priority improvements identified by users and tournament organizers while supporting the area's growing recreational demand. Collectively, these enhancements would strengthen Shocker Park's competitive position within Florida's youth sports market, expand its ability to attract larger regional tournaments, increase non-local visitation and visitor spending, and reinforce the park's role as both a valued community recreation asset and an important contributor to Marion County's sports tourism economy.

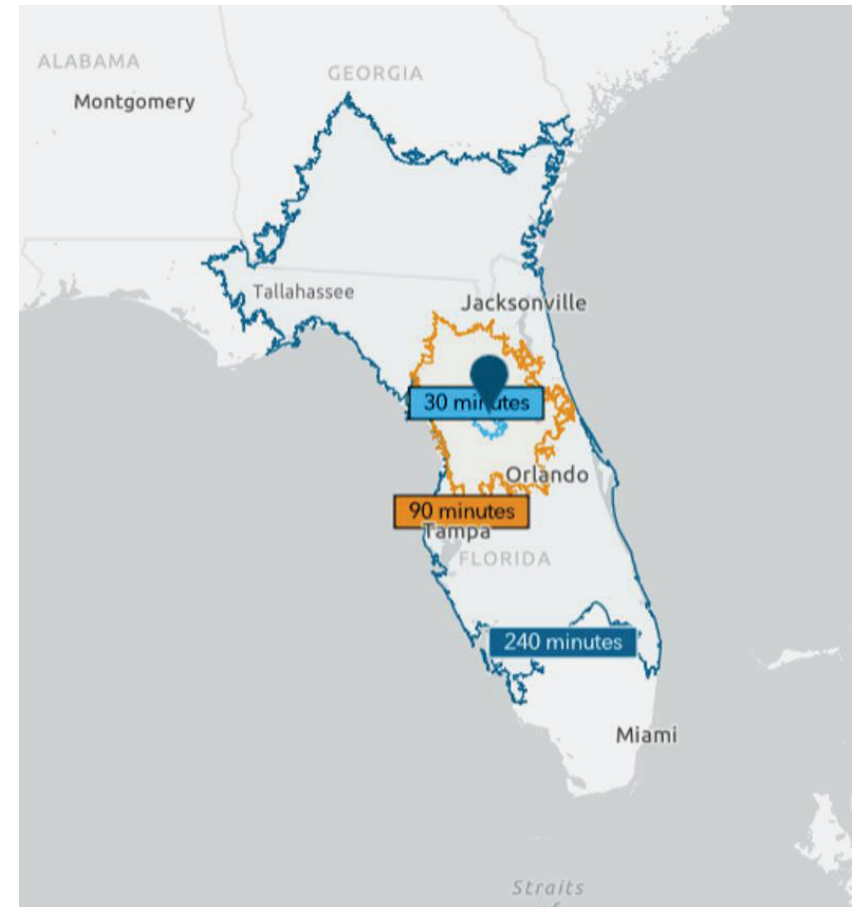


2.2 Competitive Landscape

Local & Regional Supply Overview

In order to identify if a market is primed or not for a sports complex, it is important to look at both local and regional facility supply to determine the level of competition for events such as games, practices, tournaments, and outside events. The challenges that any new sports complex will face depend on market and facility saturation, and an evaluation of whether the local and regional supply already exceeds local and regional demand for both indoor and outdoor sports.

Johnson Consulting compiled a comprehensive list of local and regional sports facilities. The facilities have been classified based on their proximity to Shocker Park. Local facilities are those within a 30-minute drive time of Shocker Park, and regional facilities are those located outside a 30-minute drive time radius and within a 240-minute drive time radius. This inventory highlights key complementary or competitive facilities. Johnson Consulting also identified sports complexes that would qualify as tournament-quality facilities – those with 4 or more fields within a 90-minute drive time catchment and those with 8 or more fields within a 240-minute drivetime catchment. Shocker Park would likely compete with these facilities for demand on either a local or regional level. Tournament quality outdoor baseball and soccer facilities are considered to have four or more diamonds/fields within a 90-minute drive time catchment and 8 or more diamonds/fields within a 240-minute drive time catchment.



Local Facility Audit

When analyzing the 30-minutes around Shocker Park, there are several large baseball/softball facilities. The largest facility in this catchment area is the Rotary Sportsplex of Marion County, another facility that is operated by Marion County. This facility is a large draw for tournaments and events. If Shocker Park is renovated with the goal of drawing additional tournaments, it could be co-programmed with Rotary Sportsplex to attract select tournaments. Similarly, smaller parks within close proximity of Shocker Park like the single field Jervey Gantt Park could provide additional ancillary sports field inventory. Other facilities like Belleview Sports Complex and Ocala Regional Sportsplex provide similarly-sized facilities to the area and are direct competitors to Shocker Park for tournaments and outside events.

Local Diamond Facilities

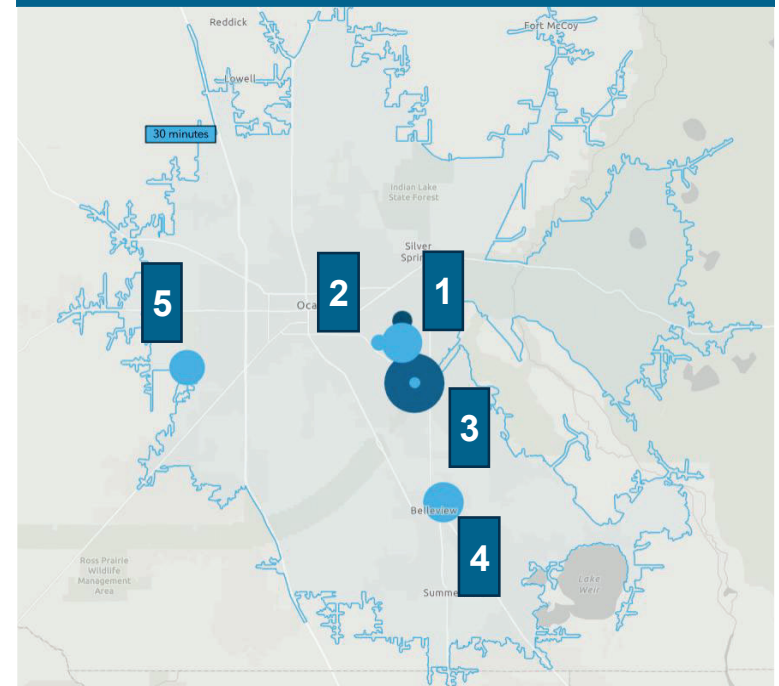
Index	Facility	Location	# of Softball Diamonds	# of Baseball Diamonds	Distance from Shocker Park
1	Shocker Park	Ocala, FL	6	0	-
2	Jervey Gantt Park	Ocala, FL	1	0	1.4
3	Rotary Sportsplex of Marion County	Ocala, FL	0	11	3.7
4	Belleview Sports Complex	Belleview, FL	6	5	8.8
5	Ocala Regional Sportsplex	Ocala, FL	5	0	11.6

*Facilities within 30-Minutes of Shocker Park

**Baseball fields defined as diamonds with grass infield

Source: Relevant Facilities, Johnson Consulting

Local Diamond Facilities



Source: Relevant Facilities, Esri, Johnson Consulting

Local Area of Opportunity

Despite the large number of facilities in the local area around Shocker Park, Shocker Park was the only facility that had 6 or more Softball exclusive diamonds. The chart to the right shows the local area's facilities based on how many softball diamonds and baseball diamonds each park has. While Rotary Sportsplex has the highest number of total facilities, it has no softball exclusive field. The lack of softball specific fields within the area provides Shocker Park with an opportunity to differentiate itself and provide a market niche that other local facilities can not.

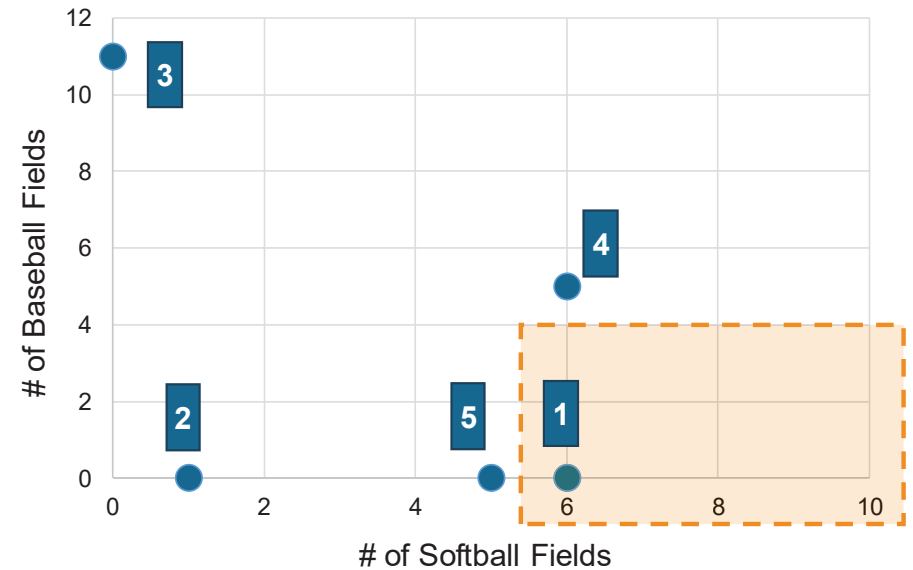
Local Diamond Facilities					
Index	Facility	Location	# of Softball Diamonds	# of Baseball Diamonds	Distance from Shocker Park
1	Shocker Park	Ocala, FL	6	0	-
2	Jervy Gantt Park	Ocala, FL	1	0	1.4
3	Rotary Sportsplex of Marion County	Ocala, FL	0	11	3.7
4	Bellevue Sports Complex	Bellevue, FL	6	5	8.8
5	Ocala Regional Sportsplex	Ocala, FL	5	0	11.6

*Facilities within 30-Minutes of Shocker Park

**Baseball fields defined as diamonds with grass infield

Source: Relevant Facilities, Johnson Consulting

Local Area of Opportunity for Diamond Facilities



*Facilities within 30-Minutes of Shocker Park

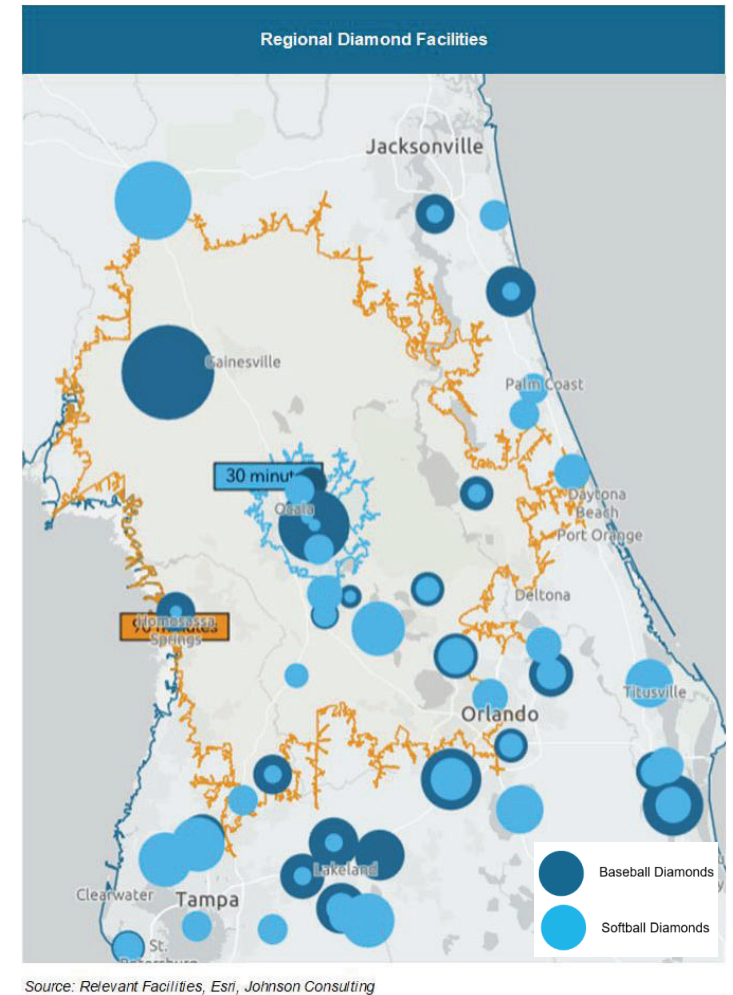
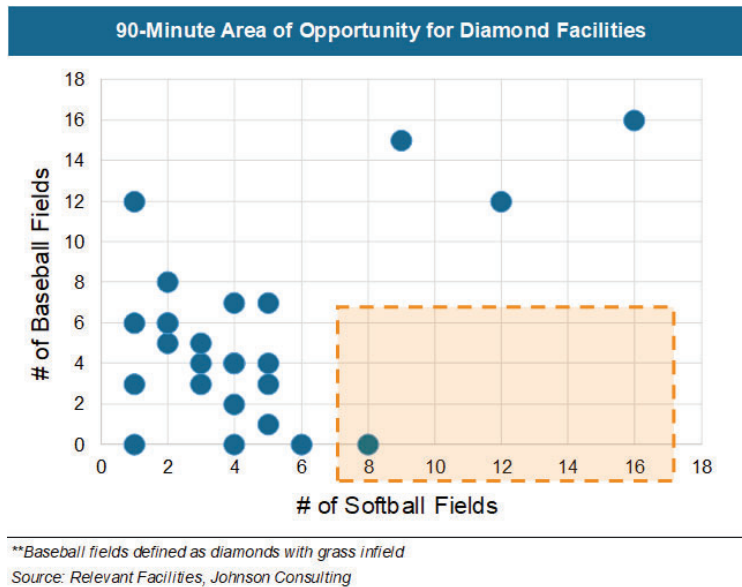
**Baseball fields defined as diamonds with grass infield

Source: Relevant Facilities, Johnson Consulting

Regional Facility Audit

An analysis of the 90-minute drive-time surrounding Shocker Park identifies a significant concentration of baseball and softball complexes, particularly within the Tampa-to-Orlando corridor. As illustrated in the chart to the right, this region is already served by numerous large-scale tournament facilities. Expanding Shocker Park with additional baseball fields would therefore provide limited competitive differentiation, as the facility would be competing directly with similarly sized, well-established venues for tournament business.

The chart below highlights the primary regional opportunity area for baseball and softball development within the 90-minute market. Even within this opportunity zone, there are five existing complexes featuring six or more dedicated softball fields, underscoring the highly competitive nature of the market.

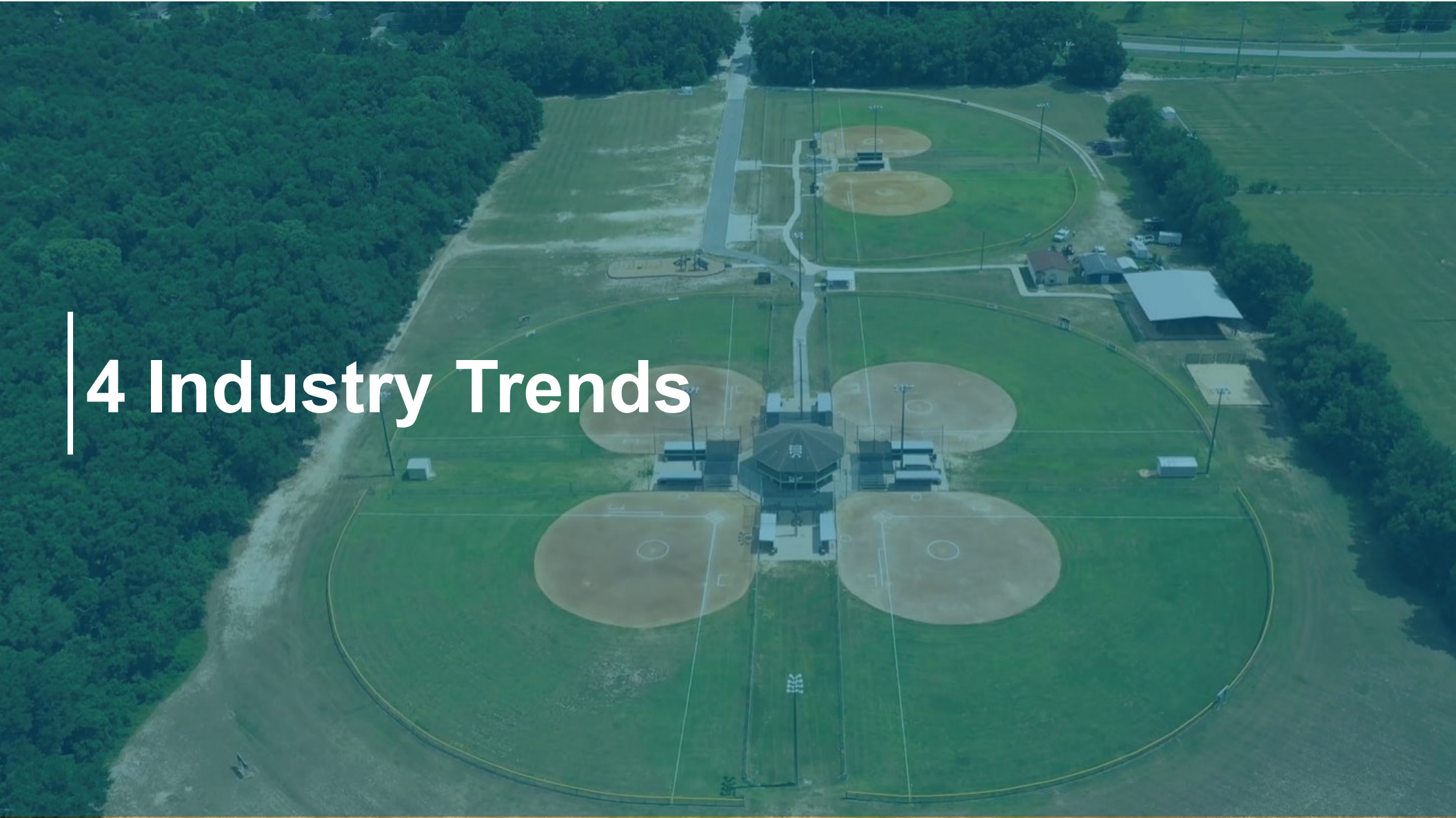


Implications

The analysis indicates that Shocker Park is positioned within a lodging market that is improving in both quality and capacity. This is a positive indicator for future tournament attraction efforts. Recent hotel renovations, increasing ADR and RevPAR performance, and nearly 500 rooms in the development pipeline suggest that the area's ability to accommodate overnight visitors will strengthen in the coming years. Shocker Park has a large number of major hotel clusters along major corridors and interstate access that provide lodging options, attracting larger stay-to-play events will require coordinated partnerships with local hotels.

From a competitive positioning standpoint, the local and regional facility inventory suggests that expanding Shocker Park as a general-purpose softball complex would place it within a highly competitive environment. Numerous comparable facilities already exist within both the local and regional catchment areas, including several tournament-quality complexes with significant field inventories. However, Shocker Park possesses a distinct competitive advantage through its concentration of softball-exclusive diamonds, a characteristic not widely replicated among nearby facilities. This specialization presents an opportunity to differentiate the park within the market and target softball tournaments and events that may have limited venue options elsewhere in the region. Future investments should therefore prioritize enhancements that strengthen this niche positioning rather than attempting to compete directly with larger multi-sport or baseball-focused complexes throughout Central Florida.

| 4 Industry Trends



Sports Industry Facility Trends

Throughout the past decade, youth sports facilities aimed at generating tourism through large multi-day tournaments have become increasingly common, as their magnitude is often able to draw demand from surrounding states, and sometimes the entire country. While generating sports tourism demand relies on several factors, the widely accepted standards for a facility to qualify as a sports tourism facility for each surface type are as follows:

- Indoor Facility: 4 or more surfaces in a single venue
- Outdoor Facility: 8 or more surfaces at a single venue

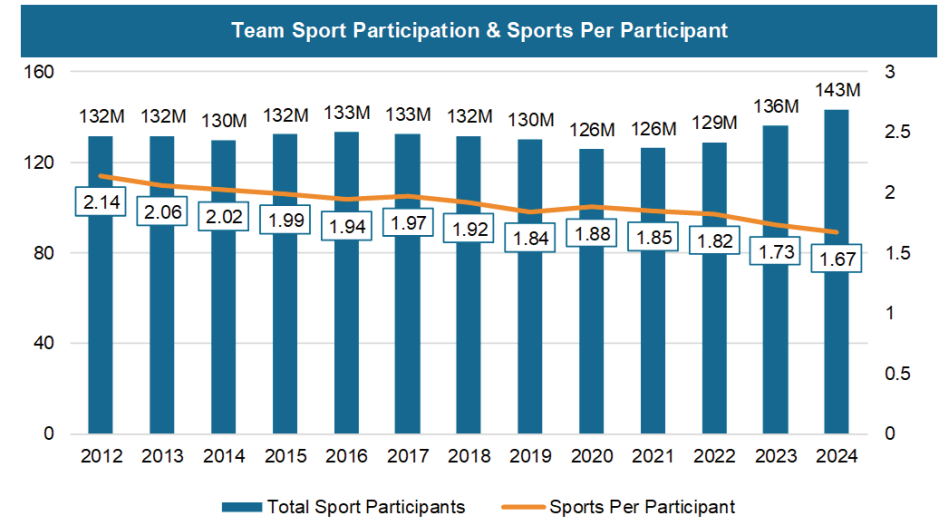
The number of surfaces is not necessarily the only determining factor for whether a facility will generate sports tourism. Other factors that influence the success of sports tourism facilities include:

- Strategic location: Facilities that have major metropolitan areas within close proximity (~4-hour drive time) are accessible to a larger number of people, and thus have more opportunities to host larger events, and can rely on steady local and regional events to provide consistent demand and out-of-town visitors.
- Proximity to other competitive sports tourism facilities: While a sports tourism facility with an ideal strategic location near a major US city may initially seem like an ideal development, it is possible that similar facilities have already been developed nearby and would represent significant competition for a new facility.
- Quality: The quality of the surfaces is often a major selling point for the most prominent sports tourism facilities in the country. Significant investment in the development and upkeep of top-quality surfaces and buildings, as well as other features such as lighting, parking, and management are essential for acquiring major events that bring in visitors from further destinations.
- Partnerships and sponsorships: Gaining recognition through an affiliation with a well-known sports team (e.g., NBA, NFL, or MLB team) or prominent athletic/sports-based company (e.g., Nike, Under Armour, Gatorade) can help propel a facility to national recognition, depending on the prominence of the sponsor/partner.

Sports Industry Participation Trends

Total team sports participation had been stagnating, if not decreasing, from 2012 to 2022, but there was an increase of 14 million participants from 2022 to 2024. 2020 marked a 10-year low in total team sports participants, but since then, that number has increased every year and even exceeded pre-COVID levels at 143 million team sports participants.

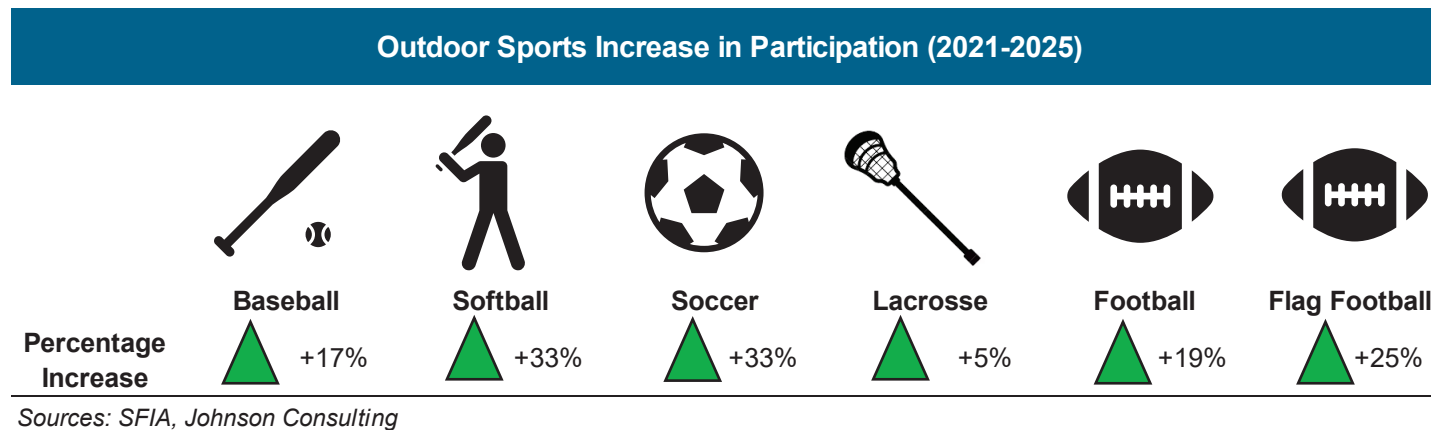
The chart to the right also shows the gradual decline in Sports per Participant. This underlies the growing popularity of specialization. As more kids choose to focus on a single sport, they no longer participate in multiple sports. While this can lead to a decrease in total sport participation, it can lead to higher commitment to participation. For example, a little league may only have one tournament a year, but travel ball leagues may have a tournament every week.



Source: SFIA, Johnson Consulting

Outdoor Sports Trends Participation

The post-COVID rebound among outdoor sports is similarly sharp among softball and soccer, which in addition to gaining participation since the lifting of COVID restrictions, have seen long-term success in gaining participation since 2010. Softball, Lacrosse and Soccer have seen a growing popularity in the United States, as seen by the addition and growth of the Athletes Unlimited Softball League, the Professional Lacrosse League, Major League Soccer, and United Soccer League. These sports are gaining in visibility and are similarly popular entertainment options for children who are deciding what sports they want to play. Nationally, baseball has seen an increase in participation from 2021 to 2025, which continues is a reversal of its decline from 2010 to 2021. As travel ball leagues take over local leagues, baseball and softball participation has become more involved, often involving practices, tournaments and games throughout the year rather than just the summer. Similarly, in warm climates like Florida, baseball and softball have longer natural playing seasons as opposed to northern climates. These changes in national participation seem to be reflected by local trends in Marion County, which seems to have a very high participation rate in baseball and softball, as evidenced by the large number of diamonds and programming in the city of Ocala and Marion County.



| 5 Case Studies



Case Study Map

The following regional case studies were chosen as examples of leading industry trends and best practices in relation to a proposed renovated or expanded sports and recreation facility at Shocker Park in Ocala, FL. The case study set includes a variety of facilities that have large concentration of outdoor diamonds. While these facilities are regional competitors with Shocker Park, they also compete for tournaments at a national level, bringing in visitors from across the country. This section of the report includes detailed profiles of each destination that describe key programming, development, and operating characteristics, as well as a benchmarking exercise to compare each of the venues' markets and other attributes to those of Ocala and Marion County.

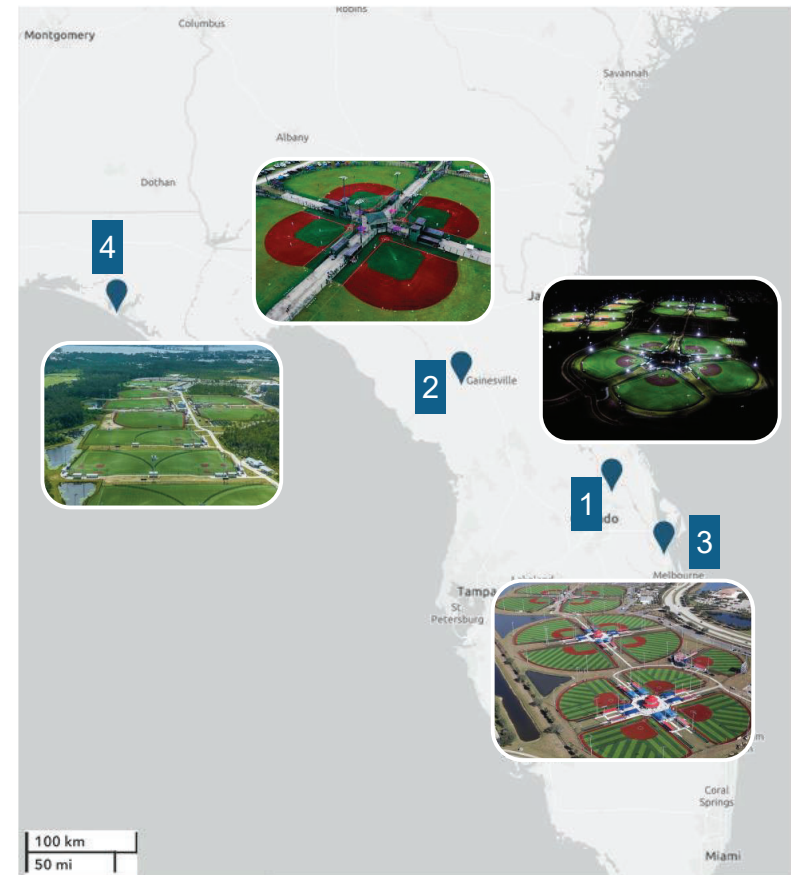
Map Legend

Key	Facility
1	Boombah Sports Complex - Sanford, FL
2	Championship Park - Newberry, FL
3	USSSA Space Coast Complex - Melbourne, FL
4	Publix Sports Park - Panama City Beach, FL

Case Studies



Johnson Consulting



Boombah Sports Complex– Sanford, Florida

Location: The Boombah Sports Complex is located in Sanford, FL, just 27 miles northeast of Orlando, the state's fourth most populous city. The complex is adjacent to Florida State Road 46 making it easily accessible via road. Additionally, Orlando Sanford International Airport is directly adjacent to the complex. This allows the draw of tournaments at Boombah to be accessible to not just drive-to visitors but fly-to visitors as well. Due to its proximity to the airport, Boombah Sports Complex is located in a less developed area and has no retail immediately surrounding the complex.

Construction/Financing: The 100-acre facility opened in 2016 at a cost of \$27 million. Facility development was funded by Seminole County's TDT tax, which allows a tax on hotels and short-term rentals to go towards tourism-driving assets. Boombah, an athletic apparel brand, purchased 10 years of naming rights from the facility for \$750,000. This agreement is set to end on July 1, 2027.

Ownership/Management: The facility is owned and operated by Seminole County. Specifically, the facility is managed by Seminole County's Leisure Services Department, which manages other public parks, libraries and cultural programs.

Economic and Development Impact: According to Wharton-Smith, Inc. Construction Group, in its first year of operation, the facility attracted over 100,000 athletes and spectators, generated more than 36,000 hotel room stays, and created \$50 million impact to the local economy.



Boombah Sports Complex– Sanford, Florida (Continued)

Facilities: The complex includes 15 diamonds, nine of them being synthetic turf, and six of them being natural turf. Additional features include batting cages, bullpens, adjustable mounds, three concession/hospitality buildings, shaded bleachers, and an administrative building. The facility has 900+ parking spaces and has designated areas for food truck services.

Ancillary Hotels and Real Estate: The facility is not immediately adjacent to any retail. There is one 111-room upper midscale hotel within a 15-minute walk of the facility that was opened in early 2026. There are 1,205 non-economy class hotels within a 15-minute drive of the Boombah Sports Complex. This inventory of hotels better services complex visitors than the lone hotel within walking distance.

Programming: The Boombah Sports Complex hosts tournaments largely on Friday-Sunday while allowing for local parks and recreation programming to occur at the facilities on weekdays. According to the Boombah Sports Complex events calendar, the facility hosted 75 tournaments on 140 tournament days in 2025. Because of the large number of facilities, the Boombah Sports Complex can hold multiple large events at the same time. Additionally, the mix of both grass and turf fields allows the facility to be consistently programmed throughout both rainy and hot months.

Visitation: Boombah Sports Complex recorded 820,870 visits in 2025 from 72,980 unique visitors, with 62% of all visits originating more than 50 miles away. This indicates the complex functions as a significant regional tournament destination, generating substantial demand for the surrounding hotel and hospitality market. At the same time, the facility's high average visit frequency demonstrates strong local utilization, particularly on weekdays when overall visitation declines but repeat use by local residents increases. This combination of destination-driven tourism and consistent community use contributes to a well-balanced operating profile.

Boombah Sports Complex 2025 Events		
	Events	Event Days
January	8	11
February	7	11
March	6	9
April	6	9
May	12	18
June	6	16
July	4	19
August	8	13
September	4	9
October	3	8
November	6	11
December	5	6
Total	75	140

Source: Boombah Sports Complex, Johnson Consulting

Champions Park– Newberry, Florida

Location: Champions Park in Newberry, Florida is located in the western portion of Alachua County, Florida. This area of Alachua County is largely rural and is 19.5 miles from Gainesville, the nearest major metropolitan area. Championship Park is not located directly adjacent to Interstate 75 and is located 13.3 miles away, making accessibility slightly more difficult for those traveling by car.

Construction/Financing: The complex was opened in 2012. The county received a donation of 80 acres on which to build the complex from a local family and was awarded a \$700,000 grant from the state. The Alachua County Commission committed a one-cent bed tax expected to raise \$12 million over 20 years to repay the facility's construction bonds. In total, the facility cost just over \$8 million to build.

Ownership/Management: As a part of Alachua County's original funding contribution, the city of Newberry agreed to take full responsibility for all ongoing park operations, maintenance and repairs. While the city of Newberry owned the facility, RADD Sports, a private management group oversaw operations. However, as of July 2025, the city of Newberry now manages the facility as well due to complaints over management and facility quality. The county has allocated continued support of the facility through the Gainesville Sports Commission's bid pool which has totaled \$346,930 as of July 2025.



Champions Park– Newberry, Florida (Continued)

Economic and Development Impact: According to the Newberry City Manager, Champions Park is the second largest tourist draw in terms of heads on beds in Alachua County, second only to University of Florida football home games. According to the Gainesville Sports Commission, a regional nonprofit that tracks economic impact for sports tourism, Champions Park brings \$100 million in annual economic impact to the area.

Facilities: Champions Park in Newberry has 16 youth fields. The fields are all uniform in size and are 220 feet from home to right and left field. The fields are turf fields in the infield and grass in the outfields. Each field has its own scoreboard and dugouts are covered and enclosed. Each quad of diamonds has an elevated scouting and observation tower for coaches and recruiters as well as a full-service concessions stand. The complex also has an indoor training facility with six batting cage tunnels and two pitching mounds.

Ancillary Hotels and Real Estate: Because Champions Park is located in a more rural area, there is not a nearby concentration of hotels or retail nearby. This makes it difficult for the city of Newberry to capture the fiscal and economic impact of the complex. There are zero hotels within a 15-minute drive of the complex and according to the Newberry City Manager, most tournament attendees do not stay at hotels in Newberry but make the drive back to Gainesville.

Visitation: Champions Park drew 634,030 visitors in 2025 from 65,950 unique visitors. Only 27 percent of visitors came from 50 or more miles away, which was the lowest percentage of the analyzed comparable facilities. While this facility may be particularly popular with local sports organizations, it also indicates the lack of nearby hotels prevents this facility from attracting tournament teams from farther away.



USSSA Space Coast Complex – Melbourne, FL

Location: The USSSA Space Coast Complex, located in Melbourne on Florida's East Coast, is about 175 miles south of Jacksonville and 52 miles southeast of Orlando, two of the state's four largest metro areas. The facility is located directly adjacent to Interstate 95, making the facility easily accessible to visitors driving from far distances.

Construction/Financing: Originally opened in 1994 as the Space Coast Stadium, the facility was built for \$6.2 million with the aim of attracting the Florida Marlins for spring training. From 1994 to 2016, it served as the home of the minor league Brevard County Manatees and hosted three Florida State League All-Star Games. Between 1997 and 2011, Brevard County invested \$7.8 million in capital improvements for the stadium. In 2017, the entire complex underwent a \$32 million renovation.

Ownership/Management: The USSSA Space Coast Complex is owned by Brevard County and is operated by the United States Specialty Sports Association (USSSA). The lease agreement began on August 3, 2015, and is set to last for 20 years. In addition to being responsible for ticket sales, concessions and maintenance projects at the complex, USSSA must spend a portion of \$250,000 in eligible capital improvements. USSSA does not pay regular lease payments to the County but guarantees a minimum of 100,000 total Brevard County hotel room nights per year.



USSSA Space Coast Complex – Melbourne, FL (Continued)

Economic and Development Impact: According to an internal audit from Brevard County, FL, the USSSA Space Coast Complex generated 66,646 room nights in the 2020-2021 fiscal year. This is a percentage shortfall of 33.4 percent. While the total number of visitors increased from the previous fiscal year, the percentage of visitors from within a 75-mile radius increased, thus driving down the percentage of room nights generated. Under their lease agreement \$83,385 ($\$250,000 * 33.4\%$) was required to be put back into the facility.

Facilities: USSSA Space Coast Complex is centered around 15 all-turf diamonds. The largest field is a NCAA-regulation field with 8,100 seats and 11 luxury suites, a 4K broadcast control room and large HD video boards. There are two additional championship stadiums with 200-foot fences. In addition to the three championship fields, there are three quads that are made up of four diamonds each. Two of the quads have fields with 320-foot fences, but can be adjusted with movable fences. The other quad has diamonds with 210-foot fences. The facility also includes batting cages, a weight room, concessions, dining packages, and video and livestream capabilities.



USSSA Space Coast Complex Room Night Calculation

$$\begin{array}{lcl} \text{\# of Room} & & \\ \text{Nights} & = & \frac{(\text{Number of Event Nights}) * (\text{Participants Living >75 miles from Stadium Complex})}{1.7} \\ \text{Generated} & & \end{array}$$

Source: Brevard County, Johnson Consulting

USSSA Space Coast Complex – Melbourne, FL (Continued)

Ancillary Hotels and Real Estate: While not as geographically rural as other locations such as Champions Park, USSSA Space Coast Complex is located between a conservation area and the ocean, limiting the total surrounding development. The facility is in a largely residential area but is located adjacent to some notable retail and hotel nodes. Within a 15-minute drive of the facility there are 1,094 hotel rooms.

Programming: According to the USSSA events calendar, the facility hosted 74 events over 202 event days in 2025.

Visitation: USSSA Space Coast Complex drew 1,190,000 visits in 2025 from 86,620 unique visitors. This was the largest total visitation numbers among the analyzed comparable facilities. 53 percent of visitors to the USSSA Space Coast Complex came from more than 50+ miles away during 2025.

USSSA Space Coast Complex 2025 Events		
	Events	Event Days
January	5	12
February	7	19
March	7	29
April	4	10
May	6	12
June	7	20
July	5	24
August	5	8
September	6	15
October	13	30
November	5	12
December	4	11
	74	202

Source: USSSA Space Coast Complex, Johnson Consulting

Publix Sports Park – Panama City Beach, FL

Location: The 160-acre Publix Sports Park is in Panama City Beach, FL. The facility is 110 miles west of Tallahassee and 170-miles east of Mobile, AL, which are the two nearest major metropolitan areas. While Publix Sports Park is not near any large major metropolitan area, its location in Panama City Beach places it close to a large number of resort towns on the Gulf Coast. This allows the complex to take advantage of the existing tourism infrastructure and maximize economic impact.

Construction/Financing: The park opened in 2019 at a cost of \$39 million. Originally known as the Panama City Beach Sports Complex, Visit Panama City announced a partnership with Publix Super Markets, making Publix the title sponsor of the facility.

Ownership/Management: The park is owned by Bay County, Florida and operated by Sports Facilities Companies (SFC). SFC's obligations include booking national tournaments, facility staffing, on-site maintenance, and enforcing venue regulations.

Economic and Development Impact: In 2019, the facility hosted 80,000 visitors, resulting in 120,000 filled room nights and generating a \$56 million direct economic impact within its first year of operation. According to a study commissioned by the Panama City Beach Chamber of Commerce, between April and September 2021, the park hosted 26 tournaments, attracting over 1,600 teams and 22,500 athletes. The summer season alone brought an economic impact exceeding \$50 million.



Publix Sports Park – Panama City Beach, FL (Continued)

Facilities: The park has 13 configurable fields with advanced cooling technology, nine synthetic turf fields, two championship fields (one soccer, one baseball), and four natural grass fields. Six of the synthetic turf fields can be modified to accommodate softball/baseball in addition to soccer/lacrosse/football. The maximum number of diamonds the facility can host at one time is ten including the baseball specific championship field. The maximum number of soccer fields the facility can host at one time is twelve including the soccer exclusive championship field. Other amenities include a warmup arena, seven batting cages, an umpire/referee locker room and lounge, and over 1,000 parking spots.

Ancillary Hotels and Real Estate: There is one hotel immediately adjacent to the facility that has 131 rooms. Within a 15-minute drive time radius there are 6,986 hotel rooms and a large number of retail, dining and family friendly entertainment options such as the beach or ZooWorld. Panama City Beach's pre-existing infrastructure of tourism assets allows visitors to have an ample number of options of post-event activities and events, increasing the economic impact of the stadium.

Programming: A comprehensive events calendar for 2025 is not available for Publix Sports Park, but the complex holds an estimated 65 large tournament events according to the Publix Sports Park. The various field configurations allows the facility to hold both baseball and soccer tournaments simultaneously, optimizing revenues, utilization and economic impact.

Visitation: Publix Sports Park drew 771,300 visitors in 2025 from 92,460 unique visitors. 36 percent of visits came from 50+ miles away. The park had a visit frequency of 8, ranking it last among the analyzed comparable facilities.



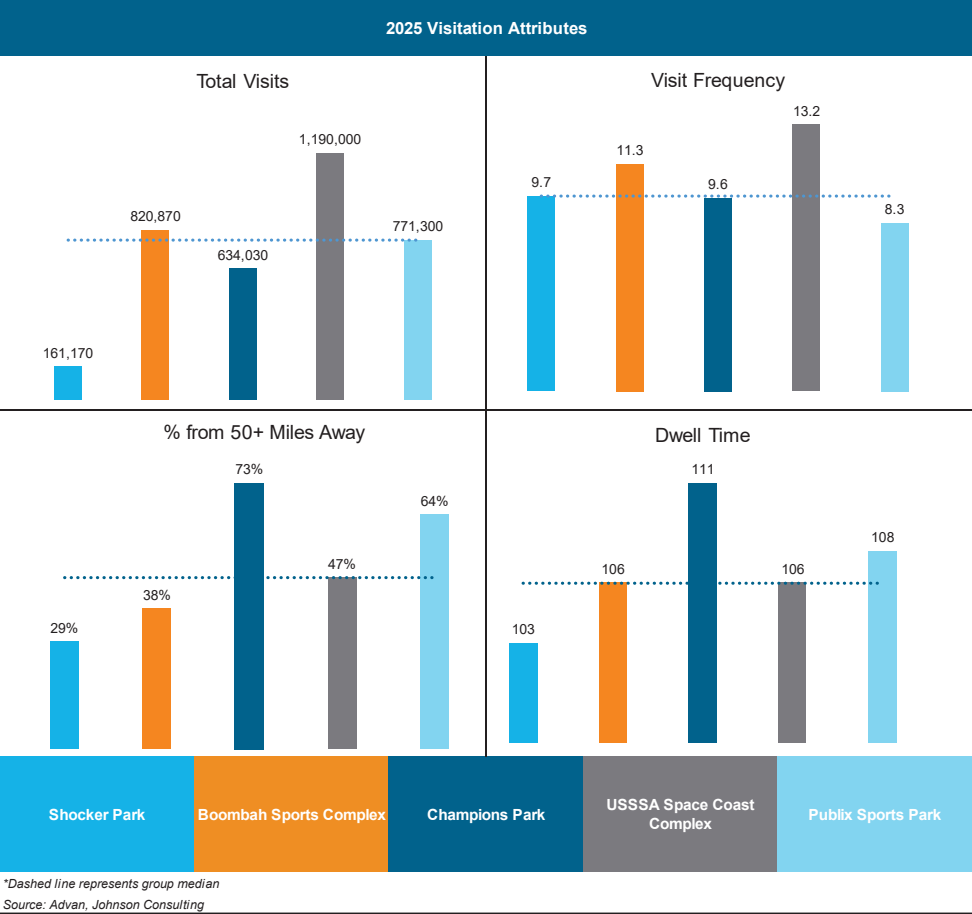


Benchmarking – Visitation Data

Advan aggregates location data from users’ mobile app usage. When a geographic polygon or radius is drawn in Advan’s platform, a mobile user who spends time within that location is counted as one visit. This is aggregated into visitation trends and demographic trends. For our analysis of the comparable facilities, we excluded anyone who spent less than 15 minutes within the location’s boundaries.

The analysis conducted for this study includes total visitation, visitor frequency, the percentage of non-local visitors (as defined by coming from more than 50+ miles away) and average dwell time. As shown, USSSA Space Coast Complex has attracted the highest volume of visitors and the highest visit frequency. Champions Park in Newberry had the highest percentage of non-local visitors and dwell time, but had a visitation below the group median, which was represented by the dashed line.

At 161,170 visitors in 2025, Shocker Park had the lowest total visitation compared in the analyzed set by a large margin. The next closest was Champions Park which had 570,000 more visits in 2025 than Shocker Park. Shocker Park also ranked last in non-local visitors and dwell time. These last place rankings likely stems from Shocker Park having less diamonds and soccer fields than the other complexes, limiting its total utility.



Benchmarking – Market Attributes

The charts to the right benchmark the 30-minute drive time radius around Shocker Park to the same catchment areas around the comparable facilities. This captures the immediate market for these facilities. As shown, Shocker Park has the group's median total population with Boombah and USSSA having higher local populations. While not as close to major metro areas like Boombah is to Orlando, Shocker Park is still within a reasonable distance of large markets like Orlando and Gainesville. Shocker Park does have a higher-than-average median age and lower than average median household income and spend on sports. A renovated Shocker Park will need to maintain its priority as a community asset with community rental rates priced to balance community utilization and outside visitation for tournaments.

While population and income are important factors to consider when developing a public assembly facility or public amenity, they are not the only predictors of success. For example, the region is heavily competitive with sports and recreation venues. While this may highlight the difficulty in drawing tournaments from other large venues, it also indicates the strong demand for sports and recreation facilities in this region.



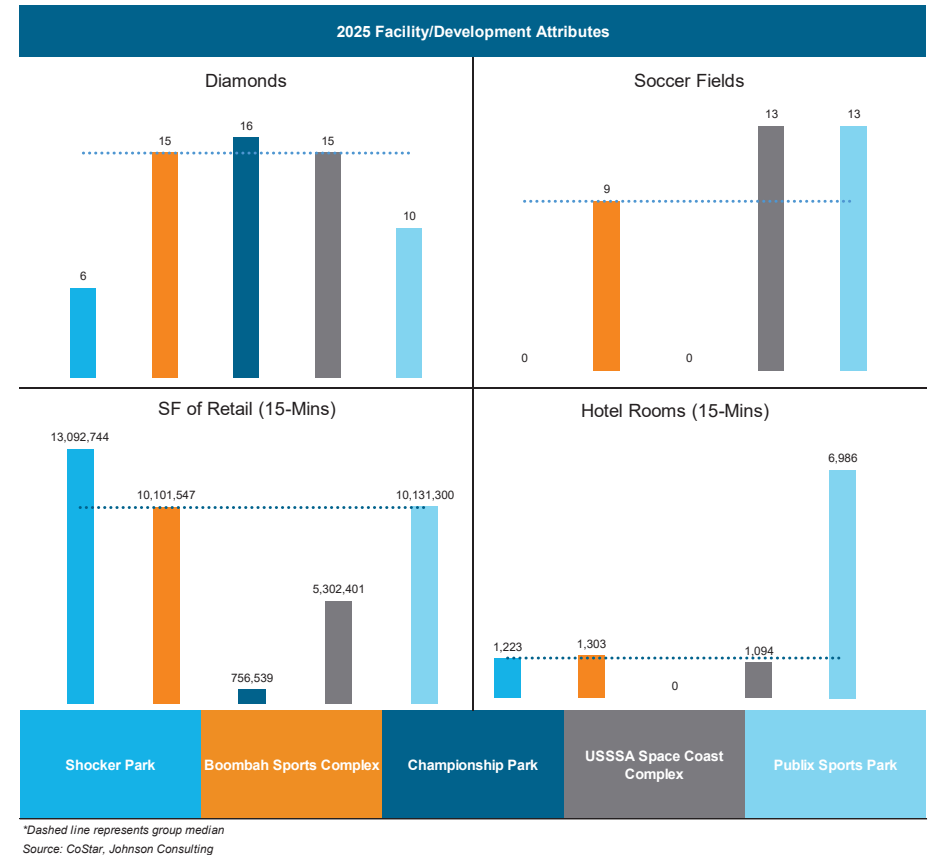
*Dashed line represents group median

Source: ESRI, Johnson Consulting

Benchmarking – Facility Attributes

To further analyze the scale and programming of each case study, the charts at right benchmark the number of diamonds and soccer fields at each facility. All except Publix Sports Park are purpose built for baseball events with soccer events serving as a secondary demand layer. All facilities except for Shocker Park had 10 or more diamonds, further indicating the importance of baseball/softball events to these facilities. While Publix Sports Park was the only facility with purpose-built soccer fields, the other complexes' soccer events are limited to exclusively turf fields. Despite having 16 turf infields, Champions Park in Newberry has grass outfields, making it difficult to program soccer events here. This underscores the importance of all turf fields like those at USSSA Space Coast Complex, which can be programmed for a wide-variety of outdoor sporting events.

While the total number of diamonds or fields can increase the visitation of a facility, the ancillary real estate and hotel infrastructure is what amplifies these facilities' economic impact. Despite Champions Park in Newberry's 16 fields, the lack of nearby real estate and hotels limits the economic impact to Newberry and shifts it to nearby areas like Gainesville that have plenty of entertainment and hotel options. On the other end, facilities like Publix Sports Park are in tourism rich areas that have a large number of hotels and entertainment options, allowing the facility to maximize its economic impact to the area nearby. Shocker Park has the most square footage of retail in the analyzed benchmarking set and a median number of hotel rooms, indicating the park is well positioned to effectively impact the local economy.



Implications

The case study analysis demonstrates that the nation's most successful sports tourism facilities serve a dual purpose by functioning as both community recreation assets and regional tournament destinations. These facilities maintain strong weekday utilization through local leagues, practices, and community programming while maximizing economic impact by attracting large regional and national tournaments on weekends. Facilities such as Boombah Sports Complex illustrate how tournament-quality amenities, flexible field configurations, and well-planned support infrastructure enable year-round programming, increase utilization, and attract a diverse mix of local users and visiting tournament participants.

The analysis also highlights the importance of surrounding tourism infrastructure in maximizing the economic benefits generated by sports facilities. While high-quality venues are essential to attracting tournaments, the availability of nearby lodging, restaurants, retail, and entertainment ultimately determines how much visitor spending remains within the host community. Unlike more rural facilities such as Champions Park, where much of the economic activity extends into neighboring communities, Shocker Park benefits from its proximity to established commercial corridors, hotels, and visitor amenities.

This existing infrastructure positions Marion County to capture a greater share of tournament-related spending while enhancing the overall visitor experience. Combined with the recommended facility improvements, Shocker Park is well positioned to strengthen its competitive standing within Florida's youth sports market, increase regional visitation, and generate meaningful long-term economic benefits for the County.

An aerial photograph of a baseball field. The field is green with brown dirt bases and pitcher's mound. A central building with a dark roof is located between the two halves of the field. To the right of the field, there are several smaller buildings and a parking lot. The field is surrounded by a dense line of trees on the left and a road on the right. The text "6 High-Level Cost Estimates & Phasing Strategy" is overlaid on the left side of the image in white font.

6 High-Level Cost Estimates & Phasing Strategy

Recommended Program of Spaces

Shocker Park is well positioned to strengthen its role as both a valued community recreation asset and a regional sports tourism destination. The market analysis, stakeholder engagement, and competitive benchmarking conducted throughout this study indicate that the facility possesses many of the characteristics necessary to support increased tournament activity, but its current inventory of fields and supporting amenities limits its ability to attract larger, higher-impact events. At the same time, Marion County's projected population growth and expanding recreational demand reinforce the need for continued investment in public sports infrastructure. The recommended improvements are therefore designed to address immediate facility deficiencies while establishing a long-term roadmap that enhances both community use and sports tourism opportunities.

To balance investment with anticipated demand, Johnson Consulting recommends implementing the improvements through a three-phase capital program. This phased approach allows Marion County to prioritize investments that provide the greatest near-term return while maintaining flexibility to expand amenities and programming as utilization and visitation continue to grow.

Shocker Park Upgrades and Phasing	
Phase 1 (1-2 Years)	Cost
-Add two synthetic diamonds	\$3,500,000
-One championship w/ 500 seats minimum	
-Lighting for Entire Park	\$1,000,000
-Renovate and add Bathrooms/Concessions	\$1,550,000
-Fencing: Replace and Install temporary (6ft height minimum)	\$100,000
-Add 3 more batting cages	\$25,000
-Upgrade existing fields	\$300,000
-Surface parking lot	\$1,500,000
-Stormwater Facilities	\$750,000
-ADA	\$225,000
Phase I Total	\$8,950,000
Phase 2 (3-5 Years)	
-New playground	\$750,000
-Add streaming technology	\$150,000
Phase II Total	\$900,000
Phase 3 (5-10 Years)	
-Shade Space/Vendor Village Area	\$75,000
-Renovate existing six fields to synthetic	\$4,000,000
Phase III Total	\$4,075,000
All Phases Total	\$13,925,000

Source: Johnson Consulting, Marion County Parks & Recreation

Recommended Program of Spaces

Phase 1 (1–2 Years)

Phase 1 focuses on the foundational investments necessary to position Shocker Park as a more competitive regional softball tournament destination while enhancing the overall visitor experience. The centerpiece of this phase is the addition of two new softball diamonds, including a premier championship field with approximately 500 spectator seats capable of hosting championship games, collegiate competition, opening and closing ceremonies, and showcase events. Expanding the complex to eight diamonds aligns Shocker Park with the minimum field inventory commonly sought by many regional tournament organizers and significantly increases its ability to compete for larger multi-day events.

Supporting infrastructure improvements are equally critical to maximizing the effectiveness of these new facilities. Recommended improvements include construction of a new paved and striped parking lot to improve circulation, increase parking efficiency, accommodate tournament-related vendor activation, and enhance the overall first impression of the complex. Additional Phase 1 investments include additional restroom facilities with increased women's capacity, three additional batting cages, upgraded outfield fencing, and improvements to existing field conditions through regrading, drainage, and turf restoration. Together, these improvements address many of the highest-priority needs identified during stakeholder engagement while creating a stronger foundation for increased tournament activity, improved player safety, and higher visitor satisfaction.

Phase 2 (3–5 Years)

Phase 2 builds upon the tournament infrastructure established during Phase 1 by enhancing the visitor experience and expanding the park's family-oriented amenities. Recommended improvements include construction of a larger playground than exist today and the installation of livestreaming technology throughout the complex.

These enhancements complement the tournament experience while broadening Shocker Park's appeal beyond organized athletics. An expanded playground encourages longer family stays and increases year-round community use, while livestreaming capabilities provide a value-added amenity increasingly expected by tournament organizers and participating families. Collectively, these investments improve the overall guest experience, strengthen the park's competitive position, and support continued growth in both community recreation and sports tourism.



Recommended Program of Spaces

Phase 3 (5–10 Years)

Phase 3 represents the long-term vision for Shocker Park as a premier regional sports and recreation destination. The most significant investment is the conversion of the six existing natural grass diamonds to synthetic turf, substantially increasing scheduling flexibility, reducing weather-related cancellations, lowering long-term maintenance requirements, and enabling the complex to host a greater number of tournaments throughout the year.

Additional enhancements include expanded shade structures to improve visitor comfort during Florida's warmer months. These improvements diversify the park's programming opportunities, extend year-round utilization beyond organized athletics, and further establish Shocker Park as a premier destination that serves both Marion County residents and regional visitors while maximizing its long-term economic and community value.

An aerial photograph of a baseball field, showing the infield, outfield, and surrounding area. The field is green with brown dirt on the infield. There are several buildings and a parking lot to the right of the field. A large text overlay is positioned on the left side of the field.

7 Incremental Economic Impact & TDT Eligibility

Estimated Direct Spending

The recommended phased investment strategy is projected to substantially increase sports tourism visitation and direct visitor spending at Shocker Park over time. Based on the recommended programming strategy, annual tournament activity is projected to increase from approximately 10 tournaments under current conditions to 15 tournaments following Phase 1 improvements, 20 tournaments following Phase 2, and approximately 30 tournaments following Phase 3 implementation. As tournament inventory expands and the park becomes capable of hosting larger regional and national events, annual visitation is projected to increase from approximately 10,700 visitors today to nearly 50,000 visitors at full build-out, representing close to five-fold increase in tournament-related visitation.

This increase in visitation directly translates into greater overnight lodging demand throughout Marion County. Annual tournament-related room nights are projected to increase from approximately 6,400 room nights under existing conditions to nearly 30,000 room nights upon completion of the recommended improvements. These overnight visitors generate spending throughout the local economy, including countywide sales tax, hotels, restaurants, retail establishments, fuel purchases, and other visitor-oriented businesses.

Shocker Park Estimated Direct Spending by Tournament Visitors					
		Historical	Phase 1	Phase 2	Phase 3
Visitation					
1 # of Tournaments		10	15	20	30
2 # of Teams per Tournament(avg)		29	40	45	45
3 # of Players & Coaches per Team		12	12	12	12
4 # of Spectators per Team		25	25	25	25
5 Total Visitors		10,730	22,200	33,300	49,950
6 # of Visitor-Days	2 days of avrg stay	21,460	44,400	66,600	99,900
7 # of Room Nights		6,438	13,320	19,980	29,970
Daily Spend					
8 Lodging	\$116 / room night/person	\$746,808	\$1,591,474	\$2,458,827	\$3,798,887
9 Meals and Incidentals	\$25 / person-day	536,500	1,143,300	1,766,399	2,729,086
10 Retail	\$20 / person-day	429,200	914,640	1,413,119	2,183,269
11 Field Operations*		\$68,000	\$140,690	\$211,034	\$79,138
12 Total Daily Spend		\$1,780,508	\$3,790,103	\$5,849,378	\$8,790,379
* Provided by Marion County Parks & Recreation, assumes 75% operating cost savings upon Phase 3 full sythetic					
Source: Jonhson Consulting					

Estimated Direct Spending

Using visitor spending assumptions consistent with industry standards for youth sports travel, annual direct visitor spending is estimated to increase from approximately \$1.8 million under existing conditions to more than \$3.8 million following Phase 1 improvements, \$5.8 million following Phase 2, and approximately \$8.9 million annually following Phase 3 implementation. The majority of this spending occurs within Marion County's hospitality sector, with lodging expenditures representing the largest category of visitor spending, followed by food and beverage purchases, retail spending, and tournament-related field operations.

Additionally, broader economic impacts generated through indirect business-to-business spending and induced household spending are expected to further increase the overall economic benefit to Marion County and shown in the table to the right under total spending.

The existing total economic impact is approximately \$3 million and is projected to increase to approximately double to \$6 million following Phase 1 improvements, \$10 million following Phase 2, and \$14.5 million annually following Phase 3.

Shocker Park Estimated Local Economic and Fiscal Impacts (\$000)					
		Historical	Phase 1	Phase 2	Phase 3
Direct Spending (\$000)					
1	Total Direct Spending	\$1,781	\$3,790	\$5,849	\$8,790
Economic Impact (\$000)		Multipliers			
2	Direct Spending	\$1,781	\$3,790	\$5,849	\$8,790
3	Indirect Spending	0.2216 395	840	1,296	1,948
4	Induced Spending	0.4349 774	1,648	2,544	3,823
5	Total Spending	\$2,949	\$6,278	\$9,690	\$14,561
6	Increased Earnings	0.3510 \$625	\$1,330	\$2,053	\$3,086
7	Employment (FTE jobs)	9.224 16	35	54	81
Fiscal Impact (\$000)		Tax Rates			
Sales Tax					
8	State Sales Tax	6.00% \$62	\$132	\$203	\$299
9	County Sales Tax	1.50% 16	33	51	75
10	Total Sales Tax	7.50% \$78	\$165	\$254	\$374
Hotel Occupancy Tax					
11	Tourist Development Tax (Bed Tax)	4.00% \$30	\$64	\$98	\$152
12	Total Hotel Occupancy Tax	4.00% \$30	\$64	\$98	\$152
Corporate Income Tax					
13	Corporate Income Tax (c)	5.50% \$16	\$35	\$53	\$80
14	Total	\$16	\$35	\$53	\$80
15	Total Fiscal Impacts	\$124	\$263	\$406	\$606

a) Corresponding with Marion County Parks & Rec existing operational cost

b) Corresponding to the Shocker Park direct spending estimates for tournament visitors, Line 1.

c) Assuming that 10% of total spending goes to taxable corporate income of vendors.

Source: Johnson Consulting

Incremental Economic Impact by Phase

The phased implementation strategy allows Marion County to incrementally increase tourism activity while aligning capital investment with measurable economic returns.

Phase 1

Phase 1 represents the highest-priority investment package by addressing the primary deficiencies currently limiting Shocker Park's competitiveness within Florida's softball tournament market. The addition of two new tournament-quality fields, including a championship field, expanded restroom capacity, field improvements, batting cages, and related infrastructure allows the complex to meet the minimum facility requirements for a substantially larger number of regional tournaments.

These improvements are projected to increase annual tournament programming by 50 percent, increasing direct spending from \$1.8 million to approximately \$3.8 million annually, while generating roughly 13,320 annual hotel room nights. Because the majority of incremental spending occurs within lodging, food service, and retail establishments, Phase 1 provides an immediate and measurable increase in tourism-related economic activity throughout Marion County.

Shocker Park Economic Impact Snapshot

Historical	Phase 1
 10 Tournaments	 15 Tournaments
 10,730 Total Visitors	 22,200 Total Visitors
 6,438 Room Nights	 13,320 Room Nights
 \$1,781,000 Direct Spending	 \$3,790,000 Direct Spending
 \$2,949,000 Total Spending	 \$6,278,000 Total Spending
 16 Full Time Employees	 35 Full Time Employees
 \$124,000 Fiscal Impact	 \$263,000 Fiscal Impact

Source: Johnson Consulting

Incremental Economic Impact by Phase

Phase 2

Phase 2 builds upon the initial tournament infrastructure by enhancing the overall visitor experience through investments in parking, family-oriented amenities, and technology. While these improvements may not independently generate new tournament demand, they improve tournament marketability, visitor satisfaction, and overall destination competitiveness.

Following Phase 2 implementation, annual direct spending is projected to increase to approximately \$5.8 million, supported by approximately 33,300 annual tournament visitors and 19,980 annual hotel room nights. These improvements also strengthen Shocker Park's ability to retain existing tournaments while competing more effectively for higher-profile regional and national events.

Shocker Park Economic Impact Snapshot

Historical	Phase 2
 10 Tournaments	 20 Tournaments
 10,730 Total Visitors	 33,300 Total Visitors
 6,438 Room Nights	 19,980 Room Nights
 \$1,781,000 Direct Spending	 \$5,849,000 Direct Spending
 \$2,949,000 Total Spending	 \$9,690,000 Total Spending
 16 Full Time Employees	 54 Full Time Employees
 \$124,000 Fiscal Impact	 \$406,000 Fiscal Impact

Source: Johnson Consulting

Incremental Economic Impact by Phase

Phase 3

Phase 3 transforms Shocker Park into a premier regional softball destination through the conversion of the existing fields to synthetic turf, expanded shade amenities, and additional destination-oriented recreational assets. Turf fields significantly increase scheduling flexibility, reduce weather-related cancellations, extend seasonal programming opportunities, and improve the facility's attractiveness to tournament rights holders seeking consistent playing conditions.

Upon completion of Phase 3, annual direct visitor spending is projected to reach approximately \$8.8 million, nearly five times current spending levels. Annual visitation is expected to approach 50,000 visitors, generating nearly 30,000 hotel room nights and significantly increasing tourism-related spending throughout Marion County.

Collectively, the phased improvements create a scalable, market-driven investment strategy that incrementally enhances Shocker Park's capacity to attract larger and higher-value tournaments. Each phase builds upon the previous one, maximizing economic impact while allowing capital investments to be aligned with demonstrated market demand and long-term financial sustainability.

Shocker Park Economic Impact Snapshot

Historical	Phase 3
 10 Tournaments	 30 Tournaments
 10,730 Total Visitors	 49,950 Total Visitors
 6,438 Room Nights	 29,970 Room Nights
 \$1,781,000 Direct Spending	 \$8,790,000 Direct Spending
 \$2,949,000 Total Spending	 \$14,561,000 Total Spending
 16 Full Time Employees	 81 Full Time Employees
 \$124,000 Fiscal Impact	 \$606,000 Fiscal Impact

Source: Johnson Consulting

Tourist Development Tax Eligibility & Funding Considerations

The projected increases in visitor spending and hotel room demand demonstrate a direct relationship between the recommended capital improvements and Marion County's tourism economy. Consistent with the statutory framework governing the Tourist Development Tax (TDT), the recommended improvements are intended to enhance a publicly owned sports facility whose primary purpose is attracting regional and national sporting events that generate overnight visitation and tourism expenditures.

PHASE 1

Phase 1 contains the improvements most directly associated with increasing tourism demand, including additional tournament fields, championship seating, improved parking, field improvements, and expanded spectator amenities. Because these investments directly improve the facility's ability to attract overnight visitors and increase hotel occupancy, they represent the strongest candidates for Tourist Development Tax funding.

Additional funding opportunities may include:

- State of Florida recreation and tourism grants
- Legislative appropriations
- Naming Rights and sponsorship agreements
- Private donations and local partnership
- Parks & Recreation Bond

Tourist Development Tax Eligibility & Funding Considerations

PHASE 2

Phase 2 improvements primarily enhance the visitor experience and support larger tournament operations through expanded family amenities and technology enhancements. These investments strengthen the overall tourism product while improving operational efficiency and visitor satisfaction. Although several Phase 2 improvements may qualify for TDT funding where they directly support tourism-generating events, complementary funding sources such as Community Development Block Grants, impact fees (where eligible), private sponsorships, and corporate partnerships may also be appropriate depending on the specific improvement.

PHASE 3

Phase 3 represents the County's long-term destination investment strategy. Conversion to synthetic turf significantly expands annual programming capacity, reduces weather-related disruptions, and positions Shocker Park to compete for premier regional and national events that require high-quality playing surfaces. Given the magnitude of the capital investment, Phase 3 would likely be funded through a combination of Tourist Development Tax revenues, future capital improvement programming, state and federal grant opportunities, public-private partnerships, sponsorship revenue, and potential philanthropic contributions. Phasing these investments over time allows Marion County to align future capital expenditures with demonstrated increases in visitation, hotel demand, and tourism-related economic activity generated during the earlier phases.

Implications

The analysis demonstrates that the recommended phased investment strategy represents a pragmatic approach to expanding Marion County's sports tourism economy while preserving Shocker Park's important role as a community recreation asset. Rather than relying on a single large-scale capital investment, the phased implementation plan allows the County to incrementally enhance tournament competitiveness, validate market demand, and reinvest in future improvements as tourism activity grows.