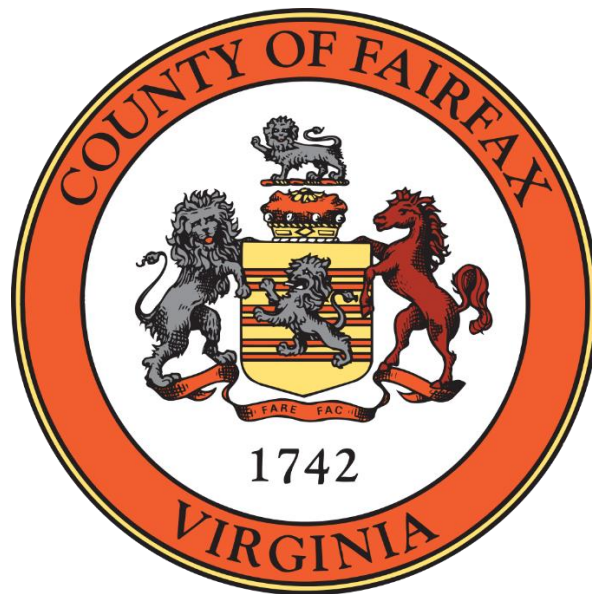


FAIRFAX COUNTY

SPORTS TOURISM TASK FORCE

First Interim Report



November 8, 2018
Fairfax County, Virginia

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TABLE OF CONTENTS

BACKGROUND	5
EXECUTIVE SUMMARY	6
KEY CONCLUSIONS AND RECCOMENDATIONS	8
CURRENT, PLANNED AND OPPORTUNITIES FOR FACILITIES	12
IDENTIFIED COMMUNITY NEEDS	15
THE SPORTS TOURISM OPPORTUNITY/MARKET	17
SPORTS TOURISM FACILITIES	29
FISCAL MODELS	31
GOVERNANCE AND POLICY ISSUES	33
POTENTIAL SPORTS TOURSIM OPPORTUNITIES	37
APPENDICIES	40
SUBCOMMITTEE REPORTS	42

Appendices

I. Board Summary Authorizing Sports Tourism Task Force

II. Links to Articles of Interest

- a. **HBO Documentary** =: “*Youth Sports Inc-Full Segment: Real Sports (HBO):*”
<https://www.youtube.com/watch?v=9ATwFkYpVys>
- b. **Chesterfield County**: “*In Sports Tourism Game, County wins by playing small*” <http://www.chesterfieldobserver.com/news/2017-05->

10/Front_Page/In_sports_tourism_game_county_wins_by_playing_small.html

- c. **Fairfax County Park Authority:** “Park Count” Needs Assessment
<https://www.fairfaxcounty.gov/parks/sites/parks/files/assets/documents/plandev/parkscount/needs-assessment-plan-050616.pdf>
- d. **Richmond, Virginia:** “*Why the Richmond region is making multi-million dollar investments in Sports Tourism*”
http://www.richmond.com/business/local/why-the-richmond-region-is-making-multi-million-dollar-investments/article_f0838d1b-beb3-5604-8457-dd92a852cee6.html
- e. **E-Sports:** “*E-Sports to grow substantially and near billion dollar revenues in 2018*”
<https://www.forbes.com/sites/mattperez/2018/02/21/report-esports-to-grow-substantially-and-near-a-billion-dollar-revenues-in-2018/#458a338e2b01>
- f. **Time Magazine:** “*How Kids’ Sports Became a \$15 Billion Industry*”
<http://time.com/4913687/how-kids-sports-became-15-billion-industry/>
- g. **Huddle Up Group:** “*What We do*”
<http://www.huddleupgroup.com/what-we-do-1/>

Subcommittee Reports:

- ☐ Indoor Ski & Snow Facilities
- ☐ Mountain Biking
- ☐ Rectangle Field Complex – Baron Cameron Park
- ☐ Diamond Field Complex – Patriot Park North
- ☐ Aquatic Competition Facility
- ☐ Field House/Hard Court/Indoor Track
- ☐ ESports
- ☐ Tennis Complex
- ☐ Increasing Tourism Opportunities Using Current Facilities

BACKGROUND

On June 6, 2017 the Board of Supervisors authorized the creation of the Sports Tourism Task Force (“Task Force”). See Appendix 1 for the Board Summary. The Task Force was formed to better understand the potential economic impact of the \$10 billion and growing sports tourism market and how the county could take advantage of this market to diversify its tax base and develop facilities for county residents paid for in whole or part by sports tourism generated revenue. The Task Force was directed to report back to the Board within a year and it was to look at economic impact models that can be used to determine the value of potential sports tourism opportunities, to outline what investments the county may be expected to make to achieve these goals, and what policies may need to be changed, enacted or eliminated to achieve the goals.

At its inaugural meeting on September 14, 2017, the Task Force established the following goals and objectives:

Goals: The Sports Tourism Task Force shall look at the value of potential sports/athletics tourism opportunities and partnerships, outline what investments the county may be expected to make to achieve these goals, policies that may need to be changed, enacted or eliminated to achieve these goals, and the economic impact models that can be used to determine positive impacts in our community.

Objectives:

1. Identify and document potential sports tourism facilities and opportunities for facility development
2. Identify and document community sports facility needs and potential community impacts
3. Identify and document sports tourism opportunities
4. Identify and document potential funding sources for sports tourism facilities
5. Evaluate and recommend sports tourism opportunities that should be pursued
6. Evaluate and recommend an economic impact model to evaluate sports tourism opportunities
7. Evaluate regional sports tourism resources, competition and opportunities to partner
8. Evaluate the need for a sports governance structure and make a recommendation as to whether Fairfax County should form a sports commission
9. Make recommendation for any fiscal, operational and policy changes that are needed to take advantage of sports tourism opportunities

EXECUTIVE SUMMARY

Sports tourism is a rapidly growing \$10 billion market nationwide. To date it has proven to be recession proof and has been the driving force behind some economic development and revitalization activities across the country. According to the U.S. Travel Association, more than 20% of all trips taken in the U.S. were for the purpose of attending organized sporting events. The facilities driving sports tourism have been developed in urban, suburban and rural areas.

Closer to home in Virginia, localities from James City County to Chesterfield County are investing in sports tourism facilities because not only do they pay for themselves, but they help meet the growing demand for sports facilities for residents and diversify the general fund tax base. In fiscal 2017, Chesterfield County's 50 sports tourism events had an economic impact of over \$81.7 million, which was up from the previous year, and generated \$38.6 million in revenue. Locally, Loudoun County and Montgomery County have invested in a significant number of multi-field complexes.

Sports tourism generates several types of revenue from sports tourism events – the direct revenues (admission fees, rental of facilities, etc.) and indirect revenues (hotel and restaurant spending, increased sales tax, etc.). Fairfax County has had some success with sports tourism largely due to the efforts of Visit Fairfax and athletic organizations. It is host to several large tournaments on a regular basis and has hosted several major sporting events, most notably the World Police and Fire Games in 2015. There are many more sports tourism opportunities that are looking to come to the county than the county has the facilities to actually handle.

Until the formation of the Sports Tourism Task Force ("Task Force"), the county has not had a coordinated approach to sports tourism. The Task Force brought together for the first time all of the stakeholders – the Fairfax County Park Authority (FCPA), Neighborhood and Community Services (NCS), Visit Fairfax, the Athletic Council, Fairfax County Public Schools (FCPS), NOVA Parks, George Mason University (GMU), Northern Virginia Community College, Fairfax County Economic Development Authority, the Fairfax County Government, and the private industry – to address sports tourism in the County.

While the county has many quality sports facilities available to its residents, they are not clustered or designed to meet the demand of sports tourism driven events. The focus of the County and the Park Authority has been to meet the unmet community needs for athletic facilities. As a result, athletic policies and funding strategies have been implemented that are focused on community needs. Athletic facilities have been provided with a specific

emphasis on meeting the needs on community based sports organizations. Our residents, rightfully so, should have priority on tax payer funded fields, but the Task Force believes some policy tweaks, in conjunction with the athletic community, could lead to additional sports tourism opportunities and funding for additional facilities.

This reality and related policies make it difficult for the County, Park Authority and Visit Fairfax to attract events. In order to grow sports tourism in Fairfax County future sports tourism facilities should be built to meet the market demands of this industry through clustering of the facilities at specified locations. These facilities, funded or financed largely with private and/or sports tourism dollars, would be available to residents when not used for sports tourism purposes thereby also meeting community needs.

Sports tourism facilities should be placed where the county can take advantage of both the direct and indirect sports tourism dollars. These facilities need to include the amenities necessary to attract events including access to hotels, amenities for non-participants and food and beverage options.

The Task Force believes that both Fairfax County residents and the tax base would benefit greatly from investments in sports tourism opportunities. Some of these opportunities will require little to no investment from the County (Indoor Ski and Snow Sports Facility/Mountain Biking) and some would require significant investment (Indoor Track/Field House/Multi-sport Hardcourt). The Task Force also has identified a number of policy and governance issues that need to be addressed. These recommendations are listed in the next section and are discussed in detail in the report.

The Task Force looks forward to working with the County's governing bodies as they deliberate and work to implement these recommendations.

KEY CONCLUSIONS AND RECCOMENDATIONS

Below is a list of key conclusions and recommendations approved by the Task Force. Each conclusion and recommendation is discussed in detail in the body of the report but summarized here for convenience. Many of the early recommendations have already been put in motion and did not require the approval of a governing body. There are a number of other significant recommendations that are not included in this summary but can be found in the text of the report.

Summary Conclusions and Recommendations

1. While Fairfax County has great sports facilities for its residents they are not clustered as desired by tournament/event organizers. The Task Force recommends that where possible sports facilities be clustered.
2. There is significant unmet community demand for sports facilities – especially hard court, larger diamond fields and rectangle fields. The Task Force recommends that the county pursue using sports tourism dollars to fund additional sports facilities for both community and sports tourism use. The Task Force further recommends engaging a consultant to evaluate the feasibility, financial and governance model for these facilities. See specific recommendations below.
3. The County has had success in attracting sports tournaments and has more sports tourism demand than facilities to host them. In addition to the shortage of facilities, current policies make it difficult to continue to compete for existing tournaments. The Task Force recommends that these policies be reviewed.
4. Until the formation of the Sports Tourism Task Force the County has not had a coordinated look at sports tourism. For some agencies, sports tourism is revenue, for others it is an expense. The Task Force concluded that the county needs a permanent entity that will bring stakeholders together on a regular basis to focus on the sports tourism market. The Task Force recommends that the Sports Tourism Task Force continue to work on the recommendations identified in this report until another governance model is adopted.
5. Several public private partnership (P3) opportunities for sports tourism were brought to the Task Force. The Task Force recommends that P3 opportunities be thoroughly investigated – especially the Indoor Ski and Snow Sports and Tennis opportunities.

6. Because Fairfax is late to enter the Sports Tourism facilities market, the Task Force recommends the County look to develop facilities that are unique and/or meet a specific or developable demand in the market, focusing on a specific niche while simultaneously meeting community needs.

Facility Oriented Conclusions and Recommendations

As further described in the report, the following factors should be considered when planning future sports facilities, especially for sports tourism facilities:

- Clustering of facilities
- Meet current or projected community needs
- Amenities for the non- participants and event organizers
- Focus on locations that leverage indirect tourism dollars – hotels, restaurants, etc.
- Designate times for sports tourism use up front
- Flexibility in the design of markings on fields and gyms
- Spectator capacity

Fiscal Model Conclusions and Recommendation

The Task Force recommends the Destinations International calculator when evaluating the fiscal impact of sports tourism events. It is customized for each destination, with minimal user inputs and is the tourism industry standard.

Governance and Policy Conclusions and Recommendations

Fairfax's ability to host state, national, regional, and international sports events is limited primarily by specific factors associated with its inventory of facilities. However, there are other governance, policy and fiscal issues that impact the County's ability to attract these events. The recommendations of the Task Force in these areas include:

1. Revisit the field and gym allocation policy with the Athletic Council to see if additional sports tourism opportunities can be made available without impacting community use – especially on holidays and times when the facilities are not typically used or underutilized.
2. Revisit the fiscal model for the allocation of revenues and expenses for sports tourism activities and other athletic activities so that all agencies see the positive impact of athletics and sports tourism. Look to provide maintenance during tournaments funded with tourism revenue.
3. Adopt a policy that allows responsible alcohol consumption at some sports tourism events.

4. Revisit the policies covering the fees to non-profit sports groups to ensure an even playing field and that fees are competitive. Flexibility in pricing for tournaments with a large fiscal impact should also be considered.
5. Review the policies on the land use requirements for athletic facilities – specifically minor floodplains.

Specific Recommendations

The Task Force formed a number of subcommittees to review specific sports tourism opportunities. The Task Force makes the following recommendations based on the work of these subcommittees as further described in the subcommittee's reports and the sections titled "Potential Sports Tourism Opportunities".

1. **Indoor Ski & Snow Facilities** - The Task Force recommends that the county continue to work towards a negotiated P3 agreement and investigate ways to run the P3 negotiation concurrently with the zoning process.
2. **Mountain Biking** – The Task Force recommends evaluation of the opportunities at Fountainhead and the mountain bike themed festival for application to the Economic Opportunity Reserve.
3. **Rectangle Field Complex** – *Baron Cameron Park* – The Task Force recommends the Park Authority develop this complex with a sports tourism component.
4. **Diamond Field Complex** – *Patriot Park North* – The Task Force recommends that Park Authority and County work to fund the final \$5M to develop this complex with a sports tourism component and work with SYA to move some community use to other 90 foot diamonds.
5. **Aquatic Competition Facility** - The Task Force recommends that the Park Authority investigate the feasibility and economics of developing one of the Olympic pools into an aquatic center for large swim meets.
6. **Field House/Hard Court/Indoor Track** - The Task Force recommends that the County expeditiously engage a consultant to investigate the economic feasibility of a large Field House/Hard Court/Indoor Track facility as a facility funded by sports tourism dollars.

- 7. ESports** – The Task Force recommends that County stakeholders provide in-kind and financial sponsorships to help offset various costs to help make tournaments more profitable and continue to partner with the local Esports community to establish a successful track record of quality events that will further grow the sport in the County and examine policy changes that could encourage the growth and tourism opportunities in Esports. It is anticipated that Esports will be a VHSL sanctioned sport in the next few years. FCPS should consider making bandwidth and computers systems available to help grow Esports in our high schools and provide additional sports tourism venues.
- 8. Tennis Complex** - The Task Force recommends the County pursue an arrangement with the US Tennis Association Mid Atlantic for the development of additional indoor and outdoor tennis facilities with the intent of making them capable of hosting large tennis events provided it is economically feasible.

CURRENT, PLANNED AND OPPORTUNITIES FOR FACILITIES

The Task Force began their work by gaining an understanding of the sports facilities the County currently has or have planned, as well as properties that might provide an opportunity for the development of sports tourism facilities. The analysis included not only Fairfax County Park and School facilities but GMU and Northern Virginia Community College facilities.

Current Facilities.

Fairfax County has many great recreational facilities and complexes to accommodate sporting events, to include facilities with pools, ice rinks, equestrian facilities, golf courses, crew facilities, pools, mountain biking trails, outdoor and indoor turf fields, baseball diamonds, and hard court surfaces. However, most of these facilities are not the single sport clustered facilities that are desired by sports tourism event hosts as they are in other jurisdictions. This poses a challenge in terms of hosting large tournaments in the county. Regional competitors such as Loudoun County and localities in Maryland and other jurisdictions in Virginia have clustered fields and sports facilities in an attempt to attract sports tourism events.

Currently, Fairfax County's inventory (including all of the groups mentioned above) of major sports facilities are as follows:

- 477 rectangular fields (soccer, football, lacrosse, rugby, cricket) – about half FCPA
- 452 sixty-foot baseball/softball diamonds
- 65 ninety-foot baseball/softball diamonds
- 227 hard court gym facilities - FCPS
- 255 tennis courts – FCPS and FCPA
- 14 County pools (2 Olympic sized) with 6 non-County pools
- 15 mountain biking facilities
- 1 indoor track is located at GM (however, the track is largely unavailable)
- 4 ice rinks (3 are privately owned – 1 Olympic))
- 8 Golf Courses at 7 different Park Authority facilities
- 5 Disc Golf Courses

These facilities are listed in the Park Authority study in the Appendices, Section II, under “Links of Interest”.

Planned Facilities

Fairfax County has a number of facilities that are under construction or in the late planning stages. Two of these have been tentatively identified to have time reserved for sports tourism activities. These facilities begin to address both the shortage of fields and the lack of clustering. These facilities include:

- Patriot Park North Ball Diamond complex of four 90ft fields, two 65ft fields and related amenities
- Mountain Road District – Rectangular and Diamond fields on the master plan but no current plans to build
- Baron Cameron Park (Reston) – 6-8 Rectangular fields
- The St James – opened Sept 2018 – a private facility with 2 NHL ice rinks, FIFA soccer field, 4 hard courts, 8 international Squash Courts, Olympic pool and other facilities

Opportunities for Facilities

The county has property that has been identified and/or zoned for athletic facilities that could provide an opportunity for future sports tourism facilities. Some of them would need revisions to the current master plans.

- **Laurel Hill Sports Complex** – 15 acres at the former Youth Correction Facility and 15 acres of developable land at the former Nike site for potential rectangular or diamond fields
- **Laurel Hill Park and South County School** – Three lighted synthetic turf rectangular fields and one 90ft diamond rectangular overlay field currently at the South County School campus. Two existing natural turf rectangular fields on the school property and land adjacent to the school campus owned by the Park Authority that could be developed for additional fields. Additional natural turf fields at the adjoining elementary school property could also be converted to synthetic fields
- **Mt. Vernon RECenter** – A potential second sheet of ice at the RECenter currently in the design stage
- **Cub Run RECenter** – Discussions of a Field House adjacent to RECenter (to be shared with school); six lane indoor track, one large event area with multi-purpose surface, two synthetic turf rectangular fields and support areas
- **NOVA Parks** – Undeveloped park land

- **Patriot Park** – Currently planned for additional three 90ft diamond fields and three full size rectangular fields and related amenities with access issues until the Popes Head Road and Fairfax County Parkway interchange is completed in 2022.
- **Various RECenter Renovations** – Might provide an opportunity for an aquatic center or other sports tourism facilities
- **Rock Hill / Quinn Farm Park** – Potential to develop multi athletic field complex on the 168 acres – has only one access point off of Old Lee Road. Comprehensive Plan transportation projects may impact the ability to fully develop this park due to future planned road alignments.
- **Lorton Workhouse Arts Campus** – minimal sports tourism development opportunities.
- **GMU (West campus)**
- **County land fill on I95** – potential for other recreational opportunities, i.e. Indoor skiing, sledding, water sports, mountain biking or other concepts that could use the vertical terrain.
- **Southwest Youth Association “Field of Dreams”** - property owned by the youth sports organization. Opportunity for diamond and rectangular fields. In close proximity to Park Authority owned Halifax Park which is also master planned for athletic fields

Conclusions/Recommendations

Based on its review of our existing facilities it was determined that with the exception of the Laurel Hill Sports Complex, the county has likely missed the window for development of significant (8 plus) rectangle field complexes. However, there is an opportunity at Baron Cameron Park, together with surrounding fields, to provide an opportunity for a significant sports tourism rectangle field complex. Rectangle fields also currently represent the largest current community need. The Task Force formed a Subcommittee to look at rectangle sports facilities. There are a number of opportunities to develop hard court (basketball, volleyball, pickle ball, wrestling) complexes.

The Task Force formed a subcommittee to further explore hard court/field house complexes. The Task Force also recommends that FCPA consider a policy to cluster field types when sports tourism opportunities may exist as they plan parks in the future.

IDENTIFIED COMMUNITY NEEDS

Following the assessment of the current and planned facilities, the Task Force went about identifying the current sports community needs – needs that could be met through facilities funded by public private partnerships or sports tourism revenues. These needs came from a number of sources and do not include any needs identified for sports tourism.

Fairfax County Park Authority

In April of 2016, the Park Authority conducted a “Parks Count” Needs Assessment that included a survey of residents and various focus groups. The Needs Assessment identified the following community needs:

- 12 additional full sized gyms through a multicourt complex and or Rec Center expansion
- An additional 30 new full size rectangular fields to meet current needs and 30 future fields to meet increased population growth by 2025
- Reinvesting in artificial turf for existing fields to increase use and improve conditions.
- With the addition of Patriot North diamond fields demand is met. Unknown future demands based on Level of Service and trends to be studied in 2021 needs assessment.
- Additional Ice rink at Mount Vernon RECenter to address county and regional needs
- Indoor and outdoor track facilities

The Park Authority’s Needs Assessment can be found in the Appendices, Section II, under “Links of Interest”.

Fairfax County Public Schools

The school system’s facilities are used extensively by community sports groups. However, school needs appropriately take priority over community uses. This causes some conflict in scheduling and use.

The school’s current significant facilities needs include an indoor track facility and a place to hold graduations. Most high schools currently rent GMU Eagle Bank Arena for

approximately \$20,000 per graduation ceremony. Schools also would like to have facilities capable of holding regional and state sports competitions.

Neighborhood and Community Services

Each year NCS receives more requests for field and gym space than it has to allocate. One measure of the demand is the percentage of applications that were unable to be accommodated. While there are multiple reasons for applications not being able to be accommodated (financial obligations, for-profit status of the applicant, etc.), the largest reason is space availability, which includes the location and presence of amenities at available facilities.

In FY2018, there were 474 total community use applications that were unable to be accommodated, which accounted for 16.5 percent of all applications received. The facility specific breakdown includes:

- Gym applications: 222 of 1,689 unaccommodated = 13.1%
- Diamond field applications: 29 of 275 unaccommodated = 10.6%
- Rectangular field applications: 223 of 909 unaccommodated = 24.5%

Community Indoor Facility Space Needs

In addition to the athletic use and special event/tournament possibilities, indoor facility space can be utilized to serve other identified county/community needs. For instance, providing space to support day programming for older adults would directly address program and service opportunities for the fastest growing segment of the Fairfax County population. Programming for older adults is traditionally operated during the weekday morning and mid-day timeframes and as such could vacate any indoor space prior to other uses coming into the facility in the after-school and evening hours. Further, this type of multipurpose use of space is in alignment with current Board of Supervisor direction to collocate programs and services where feasible. For point of clarification the NCS numbers support the numbers in the Parks Needs Assessment and are not in addition to it.

Colleges and Universities

Northern Virginia Community College currently relies on County facilities for most of its sport's needs, and their Annandale campus is currently looking for more fields. GMU facilities are occasionally available for use by community sports groups, but are used extensively by GMU students. GMU will be looking for ice rinks for their hockey teams for practices and games once their agreement with the Prince William rink ends. Currently, the teams have to travel to Prince William County and do not have ice time in Fairfax County.

THE SPORTS TOURISM OPPORTUNITY/MARKET

The Opportunity

The Sports Tourism market provides an opportunity to build or develop, through private and/or public resources, sports tourism facilities that would generate both direct and indirect sports tourism revenue that would pay for the facilities. In addition to helping meet community sports facility needs. These facilities would at the same time generate revenue for the general fund and diversify the County's revenue tax base

Because Fairfax is late to the sports tourism table, the Task Force recommends the County look to develop facilities that are unique and meet a demand or developable demand in the market. Developing our brand and our niche is important. It was recognized that Fairfax County won't attract all of the larger tournaments, but by identifying the county's niche will attract the tournaments that best suit the county's current and planned facilities.

The National Market

Sports tourism is a rapidly growing \$10 billion market nationwide. To date it has proven to be recession proof and has been the driving force behind some economic development and revitalization activities across the country. According to the U.S. Travel Association, more than 20% of all trips taken in the U.S. were for the purpose of attending organized sporting events. The facilities driving sports tourism have been developed in urban, suburban and rural areas.

Here is a list of some of the sports tourism facilities nationwide:

Prince George's County Sports and Learning Center – Landover, Maryland:

A mix of public and private athletic facilities next to FedEx Field of the Washington Redskins Football Franchise

- 200 m six lane indoor track with seating for 3,000
- Aquatic center
- Gymnastics facility
- Fitness center and learning center

Maryland Soccer Plex –Germantown, Maryland

Multi Felds Rectangular field operated by the Maryland Soccer Foundation.

- 3200 seat championship stadium

- 24 outdoor rectangular fields (3 synthetic)
- Indoor field house with eight wood courts and three artificial indoor fields

Grand Park - Westfield, Indiana: Private property developed into two complexes, each with nine fields, hosting national baseball, soccer, lacrosse and rugby tournaments.

- Largest youth sport facility in the world
- 400 acres
- 31 outdoor soccer fields
- 3 full-size indoor soccer fields
- 26 diamond fields

Dicks Sporting Goods Park - Commerce City, Colorado: Hosts several camps, clinics, national tournaments and international events throughout the year.

- 24 full-size, fully-lit sports fields,
- 22 natural grass and 2 synthetic turf fields.
- Home to Colorado Rapids men's professional soccer team
- Stadium can accommodate 18,000+ for soccer and 27,000+ for concerts

Myrtle Beach Sports Center, Myrtle Beach, South Carolina: Private facility hosting indoor basketball and volley ball tournaments year round.

- 8 court basketball courts
- 16 Volleyball courts
- Café and retail areas
- Large multi-screen video wall
- Seats up to 2,000 spectators and configurable to numerous indoor spots

National Sports Center, Blaine, Minnesota: The NSC operates over 100 unique programs and events in a variety of sports as well as hosting numerous national and international competitions.

- 660-acres of sport and event facilities
- 54 grass athletic fields
- 8 ice rink arenas
- NSC Stadium - turf field with seating capacity for 5,500 spectators
- 18,000 sq. ft. indoor sports training and expo space, offers concrete or artificial turf floor
- Victory Links Golf Course – 18-hole PGA-Tour designed golf course
- 58,000 sq. ft. indoor Field Turf field
- 250-meter all wood cycling velodrome
- 180-bed residence hall

Rocky Top – Gatlinburg, Tennessee: A state of the art sports campus in the heart of the Smoky Mountains:

- 80 acres
- 7 Outdoor Fields
- 6 state-of-the-art Synthetic Turf Fields, 1 Natural Surface Field
- 6 Fully Lit Fields
- Championship Stadium Field
- 86,000 square foot indoor facility
- 6 basketball courts
- 12 volleyball courts

Sports Tourism in Virginia

Closer to home in Virginia, localities from James City County to Chesterfield are investing in sports tourism facilities because not only do they pay for themselves but they help meet the growing demand for sports facilities for residents and diversify the general fund tax base. In fiscal 2017, Chesterfield County's 50 sports tourism events had an economic impact of over \$81.7 million up from the previous year and generated \$38.6 million in revenue. Even closer to home, Loudoun County and Montgomery County have invested in a significant number of multi-field complexes.

Here is a list of some of the sports tourism facilities in Virginia:

James Moyer Sports Complex – Salem, Virginia: Small complex that hosts both national and local tournaments for baseball and softball

- 4 full sized baseball and softball fields
- All fields are lit and has annual attendance of 250,000+
- Dugouts with restrooms & water fountains
- Two level tower for concessions and operations

Botetourt Sports Complex – Salem, Virginia: The Sports Complex features four championship level softball and youth baseball fields:

- 4 three-hundred foot irrigated fields
- State-of-the-art lighting system
- Ample spectator seating for all fields
- Dugouts with restrooms & water fountains
- On-site concessions
- Three-level tower for tournament operations and two batting cages
- Playground for children
- Half-mile paved walking track surrounding fields

Boo Williams Sportsplex – Hampton, Virginia: Uniquely designed indoor sports facility dedicated to amateur athletic competition:

- 135,000 square foot indoor sports center
- 8 tournament play basketball courts
- 12 competition volleyball courts
- 8 competition indoor hockey fields
- 200 meter, 6 lane indoor track with IAFF Certified synthetic surface, long jump, pole vault, triple jump and shot put
- Retractable bleacher seating for up to 4,000

Warhill Sports Complex, Williamsburg, Virginia: This complex is host to most local sporting events for county league play and tournaments:

- 1 lighted Major League baseball field, 3 lighted youth baseball fields
- 4 unlit tee-ball fields
- Outdoor batting cages
- 4 intermediate grass soccer fields
- 4 premier full-size soccer fields
- 6 synthetic turf multiuse fields
- Concession building with restrooms
- 3 lighted outdoor basketball courts
- 2 ponds for shoreline fishing
- 2-mile paved multiuse trail
- 3.5-mile wooded multiuse trail
- 3,000-seat multiuse stadium

Philip A. Bolen Memorial Park, Leesburg, Virginia: This 405-acre County-owned park was recently announced to be the new home for the DC United Headquarters, training facility, and minor league soccer team stadium. The park includes:

- 17 lighted fields
- 2 field football/lacrosse complex
- 9 diamond fields (2 wagon wheels + 1 freestanding)
- 6 soccer fields
- DC United will build 4 full-sized soccer fields (2 for DCU use, 2 for County use)
- DC United will construct 5,000 seat stadium and 40,000 sq. ft. headquarters/training facility

River City Sportsplex, Midlothian, Virginia: Chesterfield County purchased this 115-acre complex in 2016. The facility hosted 25 tournaments in 2017.

- 9 lighted synthetic fields
- 3 unlighted fields
- Restroom and concession facilities plaza
- Plans to add four new lighted synthetic fields, new concession stands, and additional parking

Smith River Sports Complex, Martinsville-Henry County, Virginia: The City of Martinsville and Henry County joined together to develop a 90-acre multi-use sports facility in 2009.

- 2 synthetic fields
- 4 grass fields
- Playground, hiking trails, river access point
- 5K cross country course
- Golf driving range
- Waterslide
- Restroom and concession facilities

Princess Anne Athletic Complex, Virginia Beach, Virginia: The City of Virginia Beach created this complex in 2002 on 85 acres. In total, the complex features:

- 8 lighted softball fields (wagon wheels)
- 4 lighted multi-purpose turf fields
- 4 hybrid Bermuda grass fields
- Two concession stands and restroom facilities

Virginia Beach Sportsplex, Virginia Beach, Virginia: Adjacent to the City of Virginia Beach's Princess Anne Athletic Complex, the Virginia Beach Sportsplex is a privately owned 15-acre complex operated by Hometown Sports Management.

- 6,000 seat stadium and lighted turf field
- US Field Hockey Regional Training Center
- 2 additional fields
- Able to host fun runs, festivals, motocross, car, and stunt shows

Hampton Roads Soccer Complex, Virginia Beach, Virginia: The City of Virginia Beach leases 75 acres to the Hampton Roads Soccer Council for \$1 a year. The complex was built in 1997 and less than a mile from the Princess Anne Athletic Complex and the Virginia Beach Sportsplex.

- 19 Bermuda grass fields
- 2 turf fields
- 2,500 square foot structure for tournament coordination
- Picnic pavilions, concession stands
- Athletic training room

Publix® Virginia Soccer Training Center, Fredericksburg, Virginia: Spotsylvania County partnered with local corporations to develop a 50-acre soccer complex, owned and operated by the Virginia Youth Soccer Association:

- 8 fields, 2 are turf fields
- Concession stands and restrooms

Striker Park, Glen Allen, Virginia: The Richmond Strikers Club owns and operates multi-purpose fields for club practice and tournaments. The complex features 11 fields, 1 is turf. The Strikers Organization includes soccer, lacrosse, field hockey, rugby, and cricket teams.

Greenwood Park Glen Allen, Virginia: Henrico County is constructing a tournament quality sports complex on 88 acres of a nearly 200-acre site. The current phase includes:

- 8 lighted multipurpose synthetic fields
- Team rooms, concessions, restrooms
- Pavilions
- Sand volleyball courts
- Walking trails and playground equipment
- Second/final phase planning anticipated in fall 2018

Sports Tourism in Fairfax County

Fairfax County has had some success over the years in developing the sports market, largely due to the efforts of Visit Fairfax and our athletic organizations. Local organizations are host to several large tournaments on a regular basis and have hosted several major sporting events including the World Police and Fire Games in 2015. There are many more sports tourism opportunities looking to come to the county than the County has the facilities

to handle. In addition, there are policy and governance issues that need to be addressed in order to capitalize on the opportunities.

Since 2006, the County's tourism bureau has provided event support services to tournament directors (e.g., researching potential sports venues, collecting hotel bids, preparing event presentations and proposals, etc.) and has acted as the main liaison between these sports organizers and athletic facilities, hotels, attractions, shopping centers, restaurants, vendors, and county agencies.

Visit Fairfax has assisted event organizers in a variety of sports, from traditional ones (e.g., soccer, hockey, baseball, flag football, etc.) to the non-traditional (e.g., canine events, underwater hockey, quidditch, etc.) With a full-time staff member dedicated to sports marketing, it has engaged in a variety of activities to attract and grow state, regional, national, and international sports competitions. Some of the strategies and tactics employed include:

- Attending national sports travel industry trade shows to generate event opportunities (e.g., CONNECT Sports Marketplace, TEAMS Conference & Expo, NASC Sports Event Symposium)
- Advertising in sports travel publications and sponsoring select trade shows.
- Mining various trade publication and association databases for event opportunities.
- Building prospect lists of sports planners and conducting sales solicitation calls with those whose events match up well with Fairfax County's sports infrastructure.
- Conducting site inspections and familiarization tours to promote Fairfax County to select sports decision-makers and influencers.
- Meeting regularly with local sports leaders, tournament directors, and facility owners/managers to discuss ways to attract new events and grow existing ones.

With business spread throughout the year, the sports market remains a leading driver of group travel for Fairfax County, generating significant visitor spending and providing a sense of civic pride among residents. But as the competition for a larger slice of the sports tourism pie has become increasingly fierce, destinations across the country – often in cooperation with their local governments – have been entering into a sort of sports facilities “arms race” to offer more tournament-capable venues with large clusters of outdoor fields, indoor courts, and other facility types. Fairfax County has not kept pace in this race, however, which has adversely affected our ability to fully capitalize on the booming youth sports market.

This may seem counterintuitive given our community's significant investment in outdoor turf fields, which were built to satisfy sports clubs' space needs for practices, training, and league games. Synthetic turf is now preferred over grass by travel tournament organizers since this material ensures a high-quality, even playing surface and especially because it

minimizes the chances of event cancellations due to inclement weather. Despite the total quantity of turf fields in the county (currently 91), there are only three sites with three to four turf fields. In today's marketplace, however, multi-field complexes with four or more fields in one location are most appealing to sports event planners since such facilities provide a more festive tournament atmosphere, require less event staff, and provide convenience to college coaches who can evaluate potential recruits without the hassle of traveling to multiple locations.

The County's challenges caused by a lack of clustered field complexes are further exacerbated by several other issues, including non-prioritization of tournaments during holiday and select weekends, the inability to schedule tournaments a year in advance, potentially lengthy facility allocation response times, limited amenities/services at park and school sites, and relatively stringent inclement weather policies. For these reasons, many clients of our homegrown travel soccer tournaments have recently relocated large chunks of their tournaments – even their entire tournaments – to other local jurisdictions in Virginia (i.e., Loudoun, Stafford, Fredericksburg) or to nearby states (i.e., Delaware) offering desired field clusters and amenities/services. Unless we address the challenges and issues faced by Fairfax County's current sports tourism events, we will need to recalibrate our overall economic impact expectations for this market.

On a positive note, there is promising news regarding the potential for the sports market to generate additional business and social growth because of a new economic development program recently established by county government and several new facility developments on the horizon.

When Fairfax County hosted the 2015 World Police & Fire Games (which generated an estimated \$80+ million in economic impact, in addition to reaping tremendous financial and social benefits), we demonstrated to national and international sports governing bodies that our county is a world-class destination capable of hosting large-scale, multi-sport competitions. To capitalize on the success and momentum of the Games, we have continued to target other multi-sport competitions that match up well with the area's tourism assets. But obtaining funding to pursue these opportunities has been a challenge.

Rights fees and funding for initial operating costs can be obstacles for most bidders interested in hosting large events that attract thousands of attendees. Without the ability to make such investments requested by event rights-holders, destinations with insufficient resources are often shut out from competing for select competitions. The Fairfax County Government's new Economic Opportunity Reserve may be one potential source for these funds.

Fairfax County Multi-Sport Events:

In the summer of 2015, Fairfax County successfully hosted the World Police and Fire Games (WPFG), one of the largest participatory events in the world. Fairfax welcomed more than 10,000 first-responder athletes from 68 countries who participated in 61 sports at 58 venues over 10 days of competition. WPFG generated an estimated \$80 million in economic impact for the region, and demonstrated to national sports governing bodies that the county has the potential to host large-scale, multi-sport competitions.

To leverage the success of WPFG, Visit Fairfax has identified and targeted several events with requirements that match up well with the county's sports tourism assets. They include: National Senior Games (10,000 athletes, 19 sports, 10 days of competition), Transplant Games of America (1100 athletes; 20 sports, 10 days of competition), and the National Corporate Games (5000 athletes, 18 sports; 3 days of competition). Each of these mega-events require a variety of indoor and outdoor venues, most of which are in Fairfax's facilities arsenal. Since specific facilities may be lacking in the county, it will be important to form partnerships with other local jurisdictions, as was done for WPFG when venues in Loudoun, Prince William, and other destinations outside of Northern Virginia were used to meet event requirements.

For certain multi-sport events, a hub incorporating an Athletes Village along with a site capable of hosting several events is preferred. This is why destinations with a convention center or large university have a bidding edge and is why the Senior Games and Transplant Games will likely require a partnership with George Mason University. Another barrier to entry can be rights fees and funding for initial event operating costs. Being able to tap the county's Economic Opportunity Reserve fund would enhance our ability to compete with other destinations with insufficient financial resources.

One multi-sport event that does not require a huge financial investment is the Virginia High School League Spring Jubilee. For many years, Fairfax County Public Schools (FCPS) has hosted this three-day, 5-sport, girls and boys event that brings hundreds of students from throughout Virginia to compete in state semi-final and final competitions. This year, the Spring Jubilee is being held in Henrico County, but FCPS will likely submit a bid at the next opportunity as hosting the event locally saves the school system the expense of travel to other destinations.

Fairfax County Single-Sport Events:

In Fairfax County, single-sport events make up the vast majority of all travel tournaments. One of the county's biggest sports tourism challenges is the lack of event sites with multiple rectangular fields, diamonds, and indoor basketball courts. Clustered facilities are preferred by event organizers since they create a more festive tournament atmosphere, lower staffing costs, and provide more convenience to attendees, especially college

recruiters who prefer not having to travel to multiple sites when evaluating prospects. Given the recent relocations of several homegrown soccer tournaments from Fairfax to other local jurisdictions (even to other states), there is an opportunity to pursue new events (including non-soccer ones) that can operate with fewer such fields at multiple locations. Fortunately, the county enjoys numerous facility types that can host state, regional, national, and international events in a variety of sports, which all combine to generate tremendous economic impact for the county through visitor spending.

- **Rectangular Fields** – The Virginian Elite Showcase (Memorial Day Weekend) and The WAGS tournament (Columbus Day weekend) are two of Fairfax County’s largest soccer events. If tournaments are prioritized over these holiday weekends and sites with two or more turf fields are made available, organizers of both these events would have a strong incentive to keep as many teams as possible in the county. Other sports besides soccer are actively seeking the use of rectangular fields for tournaments. For example, Fairfax Ultimate “Frisbee” requires 10 fields (turf or grass) to host a state championship in May/June 2019. And a local adult sports group is waiting on a request for field allocations to host the 2018 Virginia State Flag Football Championships, which requires six fields divided between no more than two or three locations in early December. Other potential rectangular field facilities that could be used for competitions include the SYA Sports Park and Word of Grace Christian Center fields.
- **Diamond Fields** – The County has hosted numerous baseball and softball tournaments over the years, some annual and some requiring bids (e.g., International Senior Softball Association World Championships, Gay Softball World Series, Kyle’s Kamp Memorial Day Tournament, Virginia State Babe Ruth Championships, etc.) Fairfax Adult Softball has indicated that unless facility improvements are made to Braddock and Wakefield Parks, hosting high caliber tournaments will be a challenge. Also, many private baseball and softball tournament organizers are seeking to host events in the Fairfax County but are encountering difficulty securing sites with multiple fields. For instance, fast pitch softball has moved most of their tournaments to Loudoun County because of lack of maintenance and limited field accessibility. Once the baseball complex at Patriot Park North is completed, the four 90-foot diamonds fields and two 60-foot diamonds (all convertible to softball fields) could generate significant sports tourism if travel tournament directors are provided access.
- **Indoor Courts and Large Spaces** – With enormous potential to boost sports tourism, Hoop Magic, a seven-court basketball facility, opened in Chantilly in 2006. It was one of the few multi-court complexes in the county that could be booked by basketball and volleyball tournament organizers. After several changes in ownership/management over the years and the conversion of six courts from wood to turf, opportunities to host travel events became limited. But the recent acquisition of this property (renamed “The Fiedhouse”) by the Chantilly

Youth Association (CYA) brings renewed opportunities as this club intends to reconfigure playing surfaces once again to offer four wood courts by summer 2019. This will put CYA in an excellent position to host travel basketball and volleyball competitions. With the high demand for clustered indoor courts, there is huge potential to host very large basketball and/or volleyball tournaments at The St. James, using this facility's four basketball courts and the entire FIFA-regulation field, if it can be covered with modular flooring. The St. James has been evaluating an opportunity to host 200+ teams that are on the waiting list of one of the largest volleyball tournaments in country, the Capitol Hill Volleyball Classic, which takes place over President's Day Weekend at the Washington Convention Center. Other large indoor venues in Fairfax County with the capability of hosting a variety of sports competitions (e.g., gymnastics, fencing, wrestling, etc.) include public and private middle and high schools, George Mason University, NOVA Community College, The nZone, and the Dulles Expo Center. Facilities for esports opportunities also include Wolf Trap's Filene Center, movie theatres, vacant mall spaces, and empty buildings that can be renovated.

- **Indoor Courts (Racquet Sports)** – Small indoor tennis and racquetball tournaments are typically hosted throughout the year at various private clubs in the county. But a significant new opportunity exists to host regional and national squash tournaments with the addition of eight international-regulation courts at The St. James. Unlike other sports facilities at the megaplex, squash courts will not be programmed for training, leagues, etc. for multiple sports, so there is a willingness to be more open to using these courts for travel tournaments. In addition, the County should consider indoor courts that support tournaments within recreation and community centers.
- **Sheet of Ice** – With two sheets of ice in one location (and an additional one being considered), the main facility for hosting hockey and figure skating events in the county has been SkateQuest in Reston. MY Hockey Tournaments, a national organizer of ice hockey events, currently hosts five competitions from October-March (with a break in December) at SkateQuest and the Ashburn Ice House, with a long waiting list of teams to participate in their events. The St. James is currently considering hosting this organizer's October 2018 tournament. If another sheet of ice is installed at Mount Vernon RECenter, there will be even greater potential to host mega hockey tournaments in the county.
- **Pools** – The swimming community actively uses the Park Authority's RECenters for its travel meets since the pool at George Mason University can be difficult to secure. The St. James, with its 10-lane Olympic pool, provides the Fairfax community with even more facility options for swim meets throughout the year. Fairfax County should also consider development of one of its RECenters with an Olympic sized pool into an aquatic center with a warm up pool, separate locker facilities and adequate spectator seating.

- **Outdoor Bodies of Water** – Regattas take place several times throughout the rowing season at Sandy Run Regional Park, with participation by mostly local participants. Despite being a Class A, 1500-meter course that is considered one of the best competition venues in the country, this facility does not have the required parking infrastructure to host large-scale competitions. If the parking infrastructure were improved, the rowing community would have a greater appetite to bid on events like the Junior Nationals.
- **Large Outdoor Spaces** – Frying Pan Farm Park in Herndon is Fairfax County’s main venue for canine and equine events. Over the years, this facility has been the site of Irish Setter, Rottweiler, and Basset Hounds competitions as well as high-level equine events that bring in visitors from up and down the East Coast. Representatives of this facility feel that modernizing footing in the indoor arena and adding horse jumps to the outdoor rings will generate more opportunities to host state and regional events. Laurel Hill Park is another county facility that has enormous potential. The Tough Mudder race is very interested in this location for its Virginia event, but unless there is a way to mitigate the costs associated with testing and treating historically protected areas, it will not be feasible to host an event there that requires the digging of multiple pits.
- **Bowling Alleys** – Bowl America Chantilly is currently bidding to host the 2020 Virginia State Open Bowling Championships in June 2020. Approximately 3000 participants would compete over six consecutive weekends in May and June, potentially generating an estimated \$785,000 in direct visitor spending.

Potential to Increase Current Tourism Opportunities

Fairfax County has excellent tourism assets, including 100+ hotels at multiple price points, world-class attractions and shopping, and a multitude of restaurants. However, the County lacks clustered sports facilities. The Task Force recommends the county expedites development of clustered rectangular/diamond field and court complexes, prioritize travel tournaments over holiday weekends, consider providing maintenance during tournaments and further improve facility amenities for non-athletes and allocation response times.

SPORTS TOURISM FACILITIES

Fairfax County has excellent tourism assets, including 100+ hotels at multiple price points, world-class attractions and shopping, a multitude of restaurants for every taste and budget, convenient access to major airports and roadways, and close proximity to our nation's capital, with all its magnificent monuments, museums, and memorials.

With more than a million residents, Fairfax County is a large, sports-minded community that has over the years built a large number of public and private facilities to meet the varied needs of youth and adult athletes. Many of the county's sports facilities are also top-notch. Only New York City can match the quantity of rectangular turf fields (91) the county boasts. And very few other destinations in the United States can claim a 450,000-sf indoor mega-sportsplex like The St. James.

However, Fairfax's ability to host state, national, regional, and international sports events is limited primarily by specific factors associated with its inventory of facilities. These factors include the availability of desired event dates at facilities; the required quality, quantity, and clustering of facilities; rental pricing; policies and regulations affecting the ability to secure and/or use facilities; seating capacity; parking; amenities; and staffing support onsite.

Facilities Needed to Draw Sports Tourism and Meet Critical Community Needs

Some of these facilities are on a wish list, while others are already planned or could be funded. To get more specific on how Fairfax County could become more competitive in attracting sports tournaments, the following facilities would need to be considered:

- Sports complexes with 8-12 rectangular fields for Soccer, Lacrosse, Football, Rugby, Field Hockey, and other sports;
- Sports complexes with 4-6 diamond fields for baseball and softball with moveable fences;
- Multi-sport hardcourt complex with more than 10 hardcourts for basketball, volleyball, pickleball and other hard court tournaments;
- Sports complex with an indoor track which meets the standard 200 meters in circumference with 6-8 lanes.

Facility Amenities

Attracting large sporting events not only requires focus on the athletes and coaches, but the families and friends who travel with the teams. For tournaments occurring at these sports complexes, the following list of amenities should be considered to ensure non-athletes are accommodated:

- Food Vendors and Bathrooms
- Adequate parking, Staff and Concessions
- Press Boxes and Quality scoreboards
- Synthetic fields and Practice areas
- Open gathering spaces and locker rooms
- Reasonable proximity to hotels, entertainment, and restaurants in the area
- Spaces for team family gathering

Not All Facilities Generate the Same Number of Player and Amount of Spending

All sports are not created equal when it comes to the tourism dollars they generate. Accurate fiscal analysis requires a model that can take into account many of the differences in spending and attendance based on many factors including the following:

- International travelers spend more than national travelers and local participants typically spend less.
- Girls/women's sports typically drive higher spending than boy's/men's sports
- Spectator and participant numbers vary by sport and age

As Fairfax County considers its options for sports tourism facilities it should consider the fiscal impact of the sports as well as the other factors.

Other Sports Tourism Facilities Factors

The size of the host facility and the proximity of surrounding facilities is important to hosting events. Given the nature of Fairfax County's current facilities, the task force recognized that it must be creative in using current inventory to meet the needs of large scale tournaments, while still incorporating the needs of the community. In addition to constructing new sports complexes, it was noted that including local school's facilities could also allow for larger tournaments (augment) to be accommodated, and that the new tournament complexes could be the 'hubs' of the tournaments, so long they are close in proximity. The Task Force also urged the county to look at the potential for less "traditional" sports and up and coming sports that are currently unsupported. This list included facilities for mountain biking (Fairfax County is home to 3 of the top 10 mountain biking locations in Virginia), tournaments, marathons and smaller races, cricket, tennis, rugby, equestrian events, pickleball, ultimate Frisbee, canine competitions, e-games, crew, and even drone racing.

Conclusion

The Task Force recommends the county expedites development of clustered rectangular/diamond field and hard court complexes, and further improve facility amenities for non-athletes.

FISCAL MODELS

Competitive bidding on state, regional, national, and international sports events has become big business. Since communities throughout the U.S. invest significant time, effort, and money to attract youth and adult athletic competitions, it is reasonable that they would want to evaluate the return on their investment. For this reason, one of the goals of the Task Force has been to identify a fiscal model to calculate the estimated economic impact of sporting events that may be hosted in Fairfax County.

Analyzing and selecting fiscal models is not any easy task. All sports are not created equal when it comes to the tourism dollars they generate. Accurate fiscal analysis requires a model that can take into account many of the differences in spending and attendance based on many factors including the following:

- International travelers spend more than national travelers and local participants typically spend less.
- Girls/women's sports typically drive higher spending than boy's/men's sports
- Spectator and participant numbers vary by sport and age

The Task Force reviewed results from a member survey conducted in 2017 by the National Association of Sports Commissions (the trade association for the sports tourism industry) reviewing the various methods used by Destination Marketing Organizations (DMOs) and sports commissions throughout the country to estimate economic impact. The Task Force identified and reviewed four potential models:

Basic Internally Developed Calculators: A basic internal calculator was used by 43% of NASC members. This type of calculator typically uses a rudimentary formula that provides the bare minimum projection of visitor spending (e.g., Number of Visitors x Number of Event Days x Avg. Daily Spend). Since it does not take into account additional event parameters or generate other key metrics, economists do not consider it a robust tool to evaluate impact.

NASC Developed Calculator: Only 2% of members used the NASC-developed calculator. Among other shortcomings, this calculator is not updated regularly, does not integrate destination-specific tax data, and necessitates that survey data be collected at the event. Additionally, many members have stated that this calculator can be difficult to use.

Independent Research Studies: Nine percent of members conducted independent research studies, which entailed hiring an economist or research firm to administer event surveys to estimate visitor spending and economic impact. Although this is a preferred calculation method, it is typically costly and time-consuming. Approximately 13% used

other data, such as media impressions, which provides a limited barometer of the overall success of an event.

Destinations International Model: A large percentage (33%) of NASC members used the economic impact calculator developed by Destinations International, the trade association representing destination marketing organizations throughout the world. This calculator was developed by Tourism Economics (an Oxford Economics company), which has partnered with more than 300 leading companies, associations, and destinations for economic impact, forecasting, and market assessments every year. This model is currently in use by Visit Fairfax.

Conclusion

The Task Force selected the Destinations International calculator for the following reasons:

- It is customized for each destination. This is important since tax codes, impact multipliers, and spending averages differ significantly across geographic locations.
- With minimal user inputs, destinations can produce impact analyses based on the latest survey and economic data available. Data sources include national studies, Longwood International's household survey, wages by industry, local/state tax rates, local impact multipliers, and venue-specific data.
- This calculator provides a broad set of outputs, measuring the direct impacts of spending, wages, jobs, taxes, and event return-on-investment. It works with varying levels of information and is able to accept different data points. In addition to integrating event-specific statistics and local/state taxes and assessments, it can also account for dollars invested by the destination to secure the event, as well as event organizer spending.
- This calculator is updated annually to reflect changes in attendee/organizer behavior and spending patterns, and each destination's model can be edited to reflect modifications in tourism-focused tax rates or other desired metrics.
- A major advantage of this fiscal model is that destinations can evaluate sports events in a similar way, which allows for a more consistent, comparative analysis.
- It is the tourism industry standard, used by Visit Fairfax and 180 other DMOs throughout the United States as well as internationally.
- It has recently been adopted by the National Association of Sports Commissions and will be available for purchase by its 800+ members.
- Visit Fairfax currently subscribes to this calculator as part of its annual membership with Destinations International and has experience using it.

GOVERNANCE AND POLICY ISSUES

The Task Force was directed to look at both policy and governance issues and make a specific recommendation on a sports commission.

Governance

Until the formation of the Sports Tourism Task Force (“Task Force”), the county has not had a coordinated approach to sports tourism. The Task Force brought together for the first time all of the stakeholders – the Fairfax County Park Authority, Neighborhood and Community Services, Visit Fairfax, the Athletic Council, Fairfax County Public Schools, NOVA Parks, George Mason University, Northern Virginia Community College, Fairfax County Economic Development Authority, the Fairfax County Government and private industry – to address sports tourism in the county. While each organization has been supportive of sports tourism, the current structure has resulted in a siloed view of sports tourism overall.

The Task Force concluded that the county needs a permanent entity that will bring these stakeholders together on a regular basis to focus on the sports tourism market. The Task Force discussed a number of options for this entity including the establishment of a separate sports commission, a new Board of Supervisors committee, and housing a group under the Park Authority or Visit Fairfax. While it is clear that such an entity and focus is needed, the Task Force concluded that it was too soon in our process to make a recommendation on an ongoing entity. Our current recommendation is that the Task Force continue to meet and work with a sports tourism consultant on the appropriate entity to replace the Task Force and focus on our sports tourism efforts.

Policies

Field and Gymnasium Allocation Policy Discussion

The current Board of Supervisor-approved policy is that league play is prioritized over tournament commitments. League play currently includes 80,000 to 90,000 participants each season and there is a shortage of fields and hard courts. This creates two big problems for sports tourism use. First, tournaments rank below community use and require multiple concessions by youth organizations that already have the fields assigned to them. Second, allocation of the fields/facilities can’t be committed more than one year in advance, and therefore the fields/facilities can’t be ‘given up’ before they are assigned. Major tournaments are typically competed and won more than a year in advance.

Recommendation

The task force referred the issue to the Athletic Council to see if they can formulate a process for specific weekends that historically are not heavily used by youth organizations, and see if they can make them available for the scheduling of major tournaments. That way the fields can be marketed for major tournaments. The goal would be to make available clustered facilities and fields. The policy would need to take into account the need for some fields for make-up games. The Athletic Council is currently considering this request.

For new facilities generated with sports tourism funding, the Task Force recommends holding back a percentage of time for tournament requirements up front.

Tournament Revenue/Fees and Related Expenses Discussion

Several policy issues were raised regarding the revenue earned from sports tourism events and the expenses to hold them. There are several types of revenue from sports tourism events – the direct revenues (admission fees, rental of facilities, etc.) and indirect revenues (hotel and restaurant spending, increased sales tax, etc.). Currently the direct fees for sports tourism events goes to the organizers and typically to NCS and FCPA for custodial services, diamond maintenance, and turf placement. Indirect revenues go primarily to Visit Fairfax and the county's General Fund.

The expenses for these events typically rests with the Park Authority or Schools. These costs include maintenance of port-a-johns, on-site staff to provide support and supplies and custodial services. These costs are not currently off-set by fees paid to the County, and have to be absorbed by the Park Authority or Schools, although FCPS requires some reimbursement from NCS for custodial services. This further contributes to a siloed approach where the Park Authority and Schools looks at these events as an expense. It is important that the county have a consolidated view of these revenues and expenses so that everyone can see and participate in the net benefit.

In addition, it was noted that Fairfax County has significantly lower fee requirements for field/facility use compared to like jurisdictions. However, sport organizers typically exist to make money; therefore, some jurisdictions waive or reduce some fees to entice tournaments considering the indirect revenue to the community as a reasonable off-set.

Other issues that were raised include school booster organizations having first right of refusal for food vendors, souvenir vendors, etc. Some sports tourism events will not accept this, as part of their funds come from these types of sales.

Recommendation

The Task Force recommends that county finance staff consider and present to the Task Force interim options for addressing the revenue/expense sharing to enable a countywide look at sports tourism opportunities. This is another area that could be addressed by the consultant.

Non-Profits versus For Profit for Tournaments and Events Discussion

The county currently has a separate fee structure for non-profit organizations and for-profit organizations that want to run sports tourism events. It was reported to the Task Force that some for-profit organizations are partnering with non-profit sport organizations in order to get the lower fee schedule. In some cases, the for-profit and not for profit end up splitting the fees.

Recommendation

The Task Force recommends that the County review the fee structure for tournaments to address this inequity.

Restrictions on Types of Play Discussion

The Park Authority and FCPS have restrictions on what sports can be played on their facilities. Since the development of these restrictions, new sports and opportunities to use facilities have been developed.

A problem with the current gym allocation policy that needs to be addressed is that there are ‘zero’ restrictions by FCPS for gym use. For example, sports that the gym was not built for such as Futsal (indoor football played on a hard court and mainly indoors). This results in abuse to the facility as well as competition for the space. Another example provided was the use of drones on rectangular fields, which have a Federal restriction as well.

Recommendation

The Task Force recommends that Fairfax County Public Schools and the Fairfax County Park Authority review their use restrictions to identify flexibility on field, gym and court use.

Alcohol at Sports Tourism Events Discussion

Until very recently, alcohol sales and consumption was prohibited at FCPA venues. FCPA currently allows alcohol consumption at certain events. For many adult sports tourism events the ability to serve alcohol is an important component of venue selection and in some cases is a requirement. In addition, the ability to purchase an alcoholic beverage has

been linked to higher sales. The Park Authority recently adopted a revised alcohol policy that permits sales of alcoholic beverages at special events. The Task Force also recommends that FCPS, the BOS and the FCPA convene a work group to look at the best practices, pros and cons of limited alcohol sales at adult sports tourism events held at school facilities.

Recommendation

The Task Force recommends that the Fairfax County Park Authority continue to evaluate and develop its policy with regard to the responsible sale of alcoholic beverages in county parks. This should include a review of the policies of competing sports tourism venues.

Field/Gym Multi-Sport Markings Discussion

It is current FCPA and FCPS policy to mark turf fields and gyms with markings for multiple sports. For many sports these multi- sport markings can lead to confusion for both officials and athletes. Certain tournaments and sponsors either require or prefer some or all of the facilities they are using have specific markings for their individual sport.

Recommendation:

The Task Force recommends that the impact of field markings on sports tourism potential be considered when new park or school facilities are being built.

Athletic fields in Minor Floodplains Discussion

Fairfax County has established Resource Protection Areas (RPA) to comply with the Chesapeake Bay Preservation Act. Most minor floodplains in Fairfax County are designated as RPA. However, a small percentage of Minor Floodplains do not meet the designation for RPA. Athletic fields may be possible in those areas; however, a Special Exception is currently required. A special exception is a significant financial barrier to development of a field in a minor floodplain. Surrounding jurisdictions have less burdensome restrictions to what can and can't be accomplished in a minor floodplain.

Recommendation

The Task Force recommends County staff develop a list of parcels which are in minor floodplains but are not considered Resource Protection Areas that might be viable for sports tourism venues. If parcels exist, the County should consider removing some of the burdensome restrictions to field development in these areas.

POTENTIAL SPORTS TOURSIM OPPORTUNITIES

The Task Force believes that both our residents and our tax base would benefit greatly from investments in sports tourism opportunities. Some of these opportunities will require little to no investment (Indoor Ski and Snow Sports Facility) and some would require significant investment (Indoor Track/Field House/Multi-sport Hardcourt).

The Task Force also looked at less “traditional” sports and up and coming sports that are currently unsupported. This list included facilities for mountain biking (Fairfax County is home to 3 of the top 10 mountain biking locations in Virginia), tournaments, marathons and smaller races, and to less recognized sports like cricket, tennis, rugby, pickle ball, ultimate frisbee, canine competitions, e-games, crew, and even drone racing. It was also determined that having a complex for tournaments is necessary, but partnering with adjacent schools to add fields and courts would also increase the volume that could be accommodated, thus creating ‘hub’ like complexes that could outsource individual events to nearby facilities to avoid overflow. In return, offering facilities to high school Division-level or State-level tournaments such as the Spring Jubilee held at Westfield, Robinson, and Lake Braddock High Schools is another opportunity to maximize county facilities as well.

The Task Force formed subcommittees to review some of the more promising opportunities and made some initial recommendations on each. Below are the summaries from the initial subcommittees. This list is by no means an exhaustive or complete list of possible opportunities.

Indoor Ski & Snow Facilities

Last year the Task Force was approached by a European firm that builds and operates indoor downhill ski and snow facilities. The fiscal and community benefits of this potential public private partnership opportunity could be numerous. Not only would it provide the county with positive cash flow with both direct and indirect revenues but it would bring economic development opportunities and international exposure. This is in addition to the sports and community use benefits. The Task Force recommends county staff develop an aggressive timeline for reviewing this opportunity so it does not go elsewhere. The subcommittee recommends that the county continue to work towards a negotiated P3 agreement and investigate ways to run the P3 negotiation concurrently with the zoning process.

Mountain Biking

With four of the top ten ranked mountain bike trails in Virginia in or near the South County area, there exists the foundation to build a vibrant mountain biking tourism strategy around. Capital improvements of around \$700,000 could make the number one ranked Fountainhead location more of a year-round destination site for mountain bike enthusiasts from all over the East Coast.

In addition, there is a potential for a significant mountain bike-themed festival held at a number of sites in South County, with the central activity site at Occoquan Regional Park. This event could see 2,000 participants annually in the first few years, and over time grow to an 8,000-person festival. Other festivals in the Mid-Atlantic States show that this potential exists. Between promoters and sites, such a festival would have minor upfront costs. Securing a major title sponsor or two could offset all or most of this upfront cost.

Rectangle Field Complex – Baron Cameron Park

While the county does not have many large tracts of land remaining on which it could build multi-rectangular field complexes, Task Force members identified a redevelopment opportunity at Baron Cameron Park. Baron Cameron is being redesigned for full size lighted synthetic turf rectangular fields. The fields are needed to meet the expanded community use in the Reston area as redevelopment to higher density occurs and can also serve as a complex for hosting sports tourism events. Redevelopment of Baron Cameron is called out in the Comprehensive Plan as way to meet growth in Reston. With expansion and upgrading of existing fields to synthetic turf there is an opportunity for more than 9 fields. Some of the additional capacity could be reserved for sports tourism events. In addition, there are significant rectangular fields in the surrounding area as well as proximity to Reston Town Center that would make this a good sports tourism opportunity.

Diamond Field Complex – Patriot Park North

Patriot Park North is currently in final design for the construction of four – 90-foot diamond fields in a wagon wheel formation in addition to two – 60-foot Little League fields. The Park Authority is an estimated \$4 million short of having the funds to construct the fields. The Task Force believes this complex has potential to be a sports tourism complex which could be completed with sports tourism funding and some of the capacity set aside for tournaments.

Aquatic Competition Facility

The Park Authority is currently studying the renovation of its RECenters. Several of the RECenters have Olympic-sized pools but they lack the warm up pool, spectator areas, and separate locker room facilities that would make them attractive to large swimming competitions. With the large number of pools in the County system, finding capacity for swimming events could be done with little disruption to existing community and sports

uses. The Task Force recommends that a consultant investigate the feasibility and economics of developing one of the current Olympic pools into an aquatic center for large swim meets.

Field House/Hard Court/Indoor Track

Two of the most pressing community sports needs are hard court facilities and a regulation indoor track. The school system is also in need of a field house large enough to host high school graduations – they currently pay GMU approximately \$20,000 per graduation. The Task Force requested carryover funding to investigate the economic feasibility of a large Field House/Hard Court/Indoor Track facility. The Carryover request was approved and the Request for Proposals is currently being drafted.

ESports

The Task Force recommends that County stakeholders provide in-kind and financial sponsorships to help offset various costs to help make tournaments more profitable and continue to partner with the local Esports community to establish a successful track record of quality events that will further grow the sport in the County and examine policy changes that could encourage the growth and tourism opportunities in Esports.

Tennis Complex

With the recent closure of several of the County's indoor tennis courts, there is a shortage of indoor court space. The Task Force subcommittee met with the US Tennis Association Mid Atlantic to discuss their desire to develop additional indoor and outdoor tennis facilities with the intent of making them capable of hosting large tennis events. The Task Force recommends the County pursue such an arrangement provided it is economically feasible and beneficial.

Increasing Tourism Opportunities Using Current Facilities

The Task Force also formed a subcommittee to investigate the feasibility of increasing our tourism opportunities using current facilities. The biggest challenge was the availability of fields and gyms on holiday weekends (when they are largely unused but allocated) and the ability to schedule the fields for sports tourism use a year in advance. The subcommittee met with the County's Athletic Council to discuss the possibility and potential solutions are under discussion. The Task Force recommends this opportunity be pursued.

APPENDICIES

I. Board Summary Authorizing Sports Tourism Task Force

INVESTIGATING SPORTS TOURISM OPPORTUNITIES (12:19 p.m.)

Supervisor Herrity said that he recently met with nine of the most active youth/adult sports groups in Springfield. During that meeting, one of the issues that came up was the need for the County to better understand the potential economic impact of sports tournaments and the economic development and sports tourism opportunities that exist by investing in these types of opportunities.

Supervisor Herrity said in his discussions with members of Visit Fairfax, the Park Authority, and the Athletic Council, there is great interest in further pursuing these opportunities. While Visit Fairfax has been pursuing some of these opportunities and regularly works with other parties, the arrangement is informal and there is no agreed-to economic model to review return on investment and no formal dialogue as to facility needs. Specifically, the County should look at an economic impact model that can be used to determine the value of potential sports tourism opportunities, to outline what investments the County may be expected to make to achieve these goals, and what policies may need to be changed, enacted, or eliminated to achieve the goals.

The pros, cons, and value of creating an ongoing organization like a sports commission should also be addressed. There are some great models around the country and in Virginia to look at. The approach taken in Chesterfield County (as described in an article attached to his written Board Matter) seems to be a model that makes good sense. Therefore, jointly with Supervisor Cook, Supervisor Herrity moved that the Board direct the County Executive to form a task force to discuss and study the items in paragraph two above and to report back to the Board no later than one year from today. He further moved that the task force be made up of representatives from the Board, the Park Authority, Fairfax County Public Schools, Neighborhood and Community Services, Visit Fairfax, the Economic Development Authority, and the Athletic Council. Supervisor Cook seconded the motion. Supervisor Foust asked to amend the motion to refer the issue to the Implementation Committee of the Board's Economic Advisory Commission (EAC) to review the issue. Discussion ensued, regarding referring the issue to the Implementation Committee of the EAC rather than creating a new taskforce, and this was accepted.

Following discussion, the question was called on the motion, as amended, and it **CARRIED** by a recorded vote of nine, with Supervisor Cathy Hudgins voting “NAY.”

<https://www.fairfaxcounty.gov/boardofsupervisors/sites/boardofsupervisors/files/assets/meeting%20materials/board/2017/june06-board-summary.pdf>

II. Links of Interest:

- a. **HBO Documentary** =: *“Youth Sports Inc-Full Segment: Real Sports (HBO):”*
<https://www.youtube.com/watch?v=9ATwFkYpVys>
- b. **Chesterfield County**: *“In Sports Tourism Game, County wins by playing small”*
- c. [http://www.chesterfieldobserver.com/news/2017-05-10/Front Page/In sports tourism game county wins by playing small.html](http://www.chesterfieldobserver.com/news/2017-05-10/Front+Page/In+sports+tourism+game+county+wins+by+playing+small.html)
Fairfax County Park Authority: *“Park Go” Needs Assessment*
<https://www.fairfaxcounty.gov/parks/sites/parks/files/assets/documents/planningdev/parkscount/needs-assessment-plan-050616.pdf>
- d. **Richmond, Virginia**: *“Why the Richmond region is making multi-million dollar investments in Sports Tourism”*
http://www.richmond.com/business/local/why-the-richmond-region-is-making-multi-million-dollar-investments/article_f0838d1b-beb3-5604-8457-dd92a852cee6.html
- e. **E-Sports**: *“E-Sports to grow substantially and near billion dollar revenues in 2018”*
<https://www.forbes.com/sites/mattperez/2018/02/21/report-esports-to-grow-substantially-and-near-a-billion-dollar-revenues-in-2018/#458a338e2b01>
- f. **Time Magazine**: *“How Kids’ Sports Became a \$15 Billion Industry”*
<http://time.com/4913687/how-kids-sports-became-15-billion-industry/>
- g. **Huddle Up Group**: *“What We do”*
<http://www.huddleupgroup.com/what-we-do-1/>

SUBCOMMITTEE REPORTS

The Task Force formed a number of Subcommittees to evaluate sports tourism opportunities that were identified by Task Force members. Copies of these reports are in a separate document. This list is by no means an exhaustive or complete list of potential sports tourism opportunities:

- ☐ **Indoor Ski & Snow Facilities**
- ☐ **Mountain Biking**
- ☐ **Rectangle Field Complex – Baron Cameron Park**
- ☐ **Diamond Field Complex – Patriot Park North**
- ☐ **Aquatic Competition Facility**
- ☐ **Field House/Hard Court/Indoor Track**
- ☐ **ESports**
- ☐ **Tennis & Pickleball Complex**
- ☐ **Increasing Tourism Opportunities Using Current Facilities**

*Copies of these reports can be found at <https://www.fairfaxcounty.gov/springfield/>