



STUDY OF SPORTS TOURISM FACILITY OPPORTUNITIES IN FAIRFAX COUNTY

August 31, 2020



BACKGROUND & SITUATION

- **CONSULTING TEAM:** Conventions, Sports & Leisure International (CSL) and CHA Consulting, Inc. (CHA) were retained to conduct a two-phased study of potential new and/or enhanced sports complexes in Fairfax County.
- **STUDY INTENT:** A primary goal of the study is to identify and evaluate facility opportunities that would allow Fairfax County, Virginia to more effectively compete within the sports tourism marketplace.
- **OBJECTIVES:** Key objectives of the study are to assist the Sports Tourism Task Force, FCPA, Visit Fairfax and other stakeholders in evaluating:
 - ✓ Market opportunities in specific sports segments to grow sports tourism in Fairfax County.
 - ✓ New and/or enhanced sports facility/complex products designed to address opportunities and needs related to sports tourism, while also enhancing opportunities for local user groups.
 - ✓ Strategies to better align governance, management, scheduling, and pricing attributes of targeted facilities with industry best practices in order to optimize competitiveness in sports tourism markets.

STUDY PROCESS

- **PROJECT EXPERIENCE:** Experience garnered through more than **1,000** sports and event facility planning and benchmarking projects throughout the country.
- **SITE VISITS:** The Project Team completed **5** visits to Fairfax County for the purpose of conducting client and stakeholder meetings, user group focus groups, community/site tours, and visual inspection of key existing facilities and infrastructure within Fairfax County.
- **INTERVIEWS & OUTREACH:** In-person and telephone interviews, meetings and focus groups with more than **200** individuals representing user groups and Fairfax County stakeholders, including representatives of the Fairfax County Athletic Council, FCPA, George Mason University, Neighborhood and Community Services, NOVA Parks, Visit Fairfax, various other recreational and amateur sporting groups, local hoteliers and business leaders; other visitor industry and community stakeholders; and local and non-local tournament/competition producers.
- **BENCHMARKING:** Research and analysis of facility data and interviews conducted with **91** competitive/regional and **24** comparable sports facilities.



STUDY SCOPE OF WORK

PHASE ONE: Market Analysis

1. Kickoff, Tours and Interviews
2. Demographic & Destination Analysis
3. County Sports Facility Supply and Demand Analysis
4. State and Regional Sports Facilities and Key Events Analysis
5. Sports Tournament Opportunity Analysis
6. Potential Partnerships
7. Preliminary Facility Recommendations

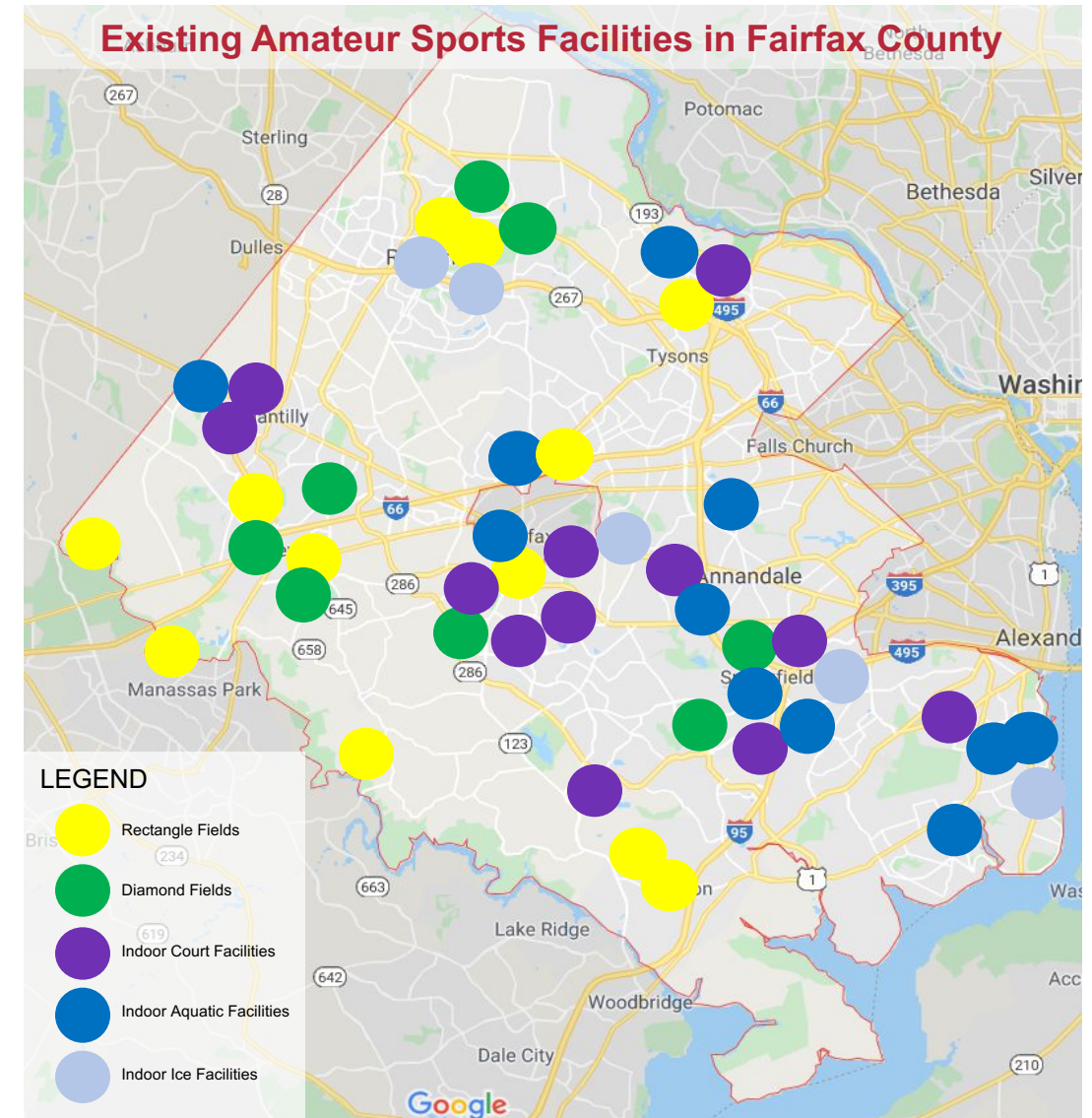
PHASE TWO: Cost/Benefit, Site & Governance Analysis

1. Refined Facility and Site Recommendations
2. Development Costs
3. Operations and Maintenance
4. Projection of Demand and Financials
5. Economic Impact Analysis
6. Benefit to the Community
7. Governance Structure
8. Presentation of Final Report

EXISTING CHALLENGES

Key issues/factors present in Fairfax County that are currently challenging for sports tourism attraction include:

- **FRAGMENTED FACILITY SUPPLY.** Lack of a critical mass of fields/courts/playing spaces in single complexes to best serve tournaments.
- **LACK OF PRIORITIZATION OF SPORTS TOURISM.** Current Fairfax County Field Allocation Policy does not prioritize sports tourism. Policies were developed to accommodate demand among Fairfax County residents first and foremost.
- **NEED FOR COORDINATED MARKET EFFORTS.** Visit Fairfax is the destination marketing organization (DMO) for Fairfax County. In destinations with successful sports tourism products, DMOs normally work actively and collaboratively with key sports facilities and hospitality infrastructure to market, sell and secure tournaments and other major athletic events for host facilities and destinations. Visit Fairfax does not currently have prioritized scheduling/booking access for sports tourism at existing sports facilities, making it significantly challenging to secure new tournament business to Fairfax County.



MARKET ANALYSIS

STRENGTHS

- **Socioeconomic Profile:** Large base of population and strong number of high-earning households throughout the drivable market.
- **Existing Sports Facility Infrastructure:** Many recreational, club, association, tournament, competition, training and other needs being addressed to some degree.
- **Potential Development and/or Operational Partners:** Local clubs/associations, George Mason University, strong presence in health care facilities, large corporate base and other organizations that could benefit through synergistic relationships.
- **Transportation Nexus:** Interstate Highways and three major international airports provide access to the greater Washington D.C. metropolitan area, the states of Virginia and Maryland, the mid-Atlantic region.
- **Favorable Climate:** Weather is conducive to extended seasons for outdoor activities.
- **Diversity of Sports & Rec Interests:** Large population base and diverse resident background creates environment where more emerging/niche sports and activities can be considered via economies of scale.
- **Visitor Industry Infrastructure:** Existing base of hotel products and visitor industry attractions present an appealing destination for non-local participants.

MARKET ANALYSIS

WEAKNESSES

- **Existing Infrastructure Needs:** Many of existing fields/facilities in Fairfax County require improvement, renovation and/or redevelopment.
- **Field & Facility Reservation System:** While existing allocation policies work well for fairly distributing field/gym space to local and recreational sports user groups, availability & booking associated with tournaments is problematic and not aligned with industry best practices.
- **Field & Facility Maintenance:** Maintenance of amateur and recreational sports facilities often falls on user groups, which may not have the resources or knowledge base to maintain these facilities at state-of-the-industry levels required to attract non-local participants.
- **Lack of Critical Mass of Field & Gym Spaces:** Offering multiple fields/gyms at a single location provides operational efficiencies and presents greater opportunities to consolidate tournament activity.
- **Transportation & Traffic:** Nonlinear roadway connectivity and traffic congestion lead to long travel times.
- **Limited Access to Large Development Parcels:** Despite the size of Fairfax County, much of the land has been developed or is unsuitable for development of a large sports tourism complex.
- **Limited Sports Tourism Brand Identity:** Lack of state-of-the-industry sports tourism products and constrained existing facility access has limited visibility within the sports tourism industry.

MARKET ANALYSIS

OPPORTUNITIES

- **New Facility Development:** Greater market and submarket destination characteristics are strong and unmet sports tourism demand is high, leading to distinct development opportunities for a variety of state-of-the-industry sports tourism facility products.
- **Renovation and/or Expansion of Existing Facilities:** Leverage existing activity at facilities like Baron Cameron Park, Braddock Park, Wakefield Park, Patriot Park/Patriot Park North, Lee District RECenter, Oak Marr RECenter, and/or Mount Vernon RECenter to limit development costs and provide enhanced access and experiences to local residents.
- **Development/Operational Partnerships:** Partnership with GMU, local health care industry organizations, Fairfax County Public Schools, Visit Fairfax or other agencies to develop and operate mutually beneficial student and community recreation space, with agreements in place to provide opportunities to generate non-local usage.
- **Leverage Existing & Planned Private Investment:** Partnership with private interests such as The St. James and Alpine-X to enhance surrounding facility offerings and/or infrastructure to encourage more non-local participation.

MARKET ANALYSIS

CHALLENGES

- **County Size:** Fairfax County service area makes it difficult to develop a one-size-fits-all approach.
- **Sustainability of Existing Amateur & Recreational Sports Facility Infrastructure:** Continued sustainability of operating existing Fairfax County-wide fields/gyms/aquatic centers/ice complexes could be impacted by the infusion of new facility supply.
- **Appropriateness of Funding Mechanisms:** Identification of revenue streams to support development and operations of facility enhancement/development can be challenging with limited service areas and/or access from certain residents.
- **Pricing Structure of Assets:** Appropriate pricing structures necessary to balance access for local residents, the desire to attract non-local participants and the need to create an operationally sustainable facilities.
- **Competitive Regional Facilities:** Communities throughout the Washington D.C. metropolitan area have existing sports tourism infrastructure and continue to invest in further developments.
- **Wide Array of Interests:** Creative solutions may be necessary to provide appropriate access to facilities that can accommodate niche amateur and recreational sports activities.

DEVELOPMENT PRIORITIES

PRIORITY 1

Outdoor Field Complexes

- New Complexes:
 - **(Priority 1A)** Rectangle Field Complex with 16 fields
 - **(Priority 1B)** Diamond Field Complex with 10 fields
- Expanded/Improved Complexes:
 - Convert all Baron Cameron rectangle fields to synthetic turf
 - Build-out Patriot Park North diamond fields (4 full-sized, 2 youth)
 - Improve Wakefield Park (improvements & turf all diamond fields)
 - Improve Braddock Park (improvements & turf all diamond fields)

PRIORITY 2

Indoor Hardcourt Complex

- New facility offering 12 full-sized courts

PRIORITY 3

Indoor Track Facility

- New 200-meter, 6-lane banked track

PRIORITY 4

Ice Complex

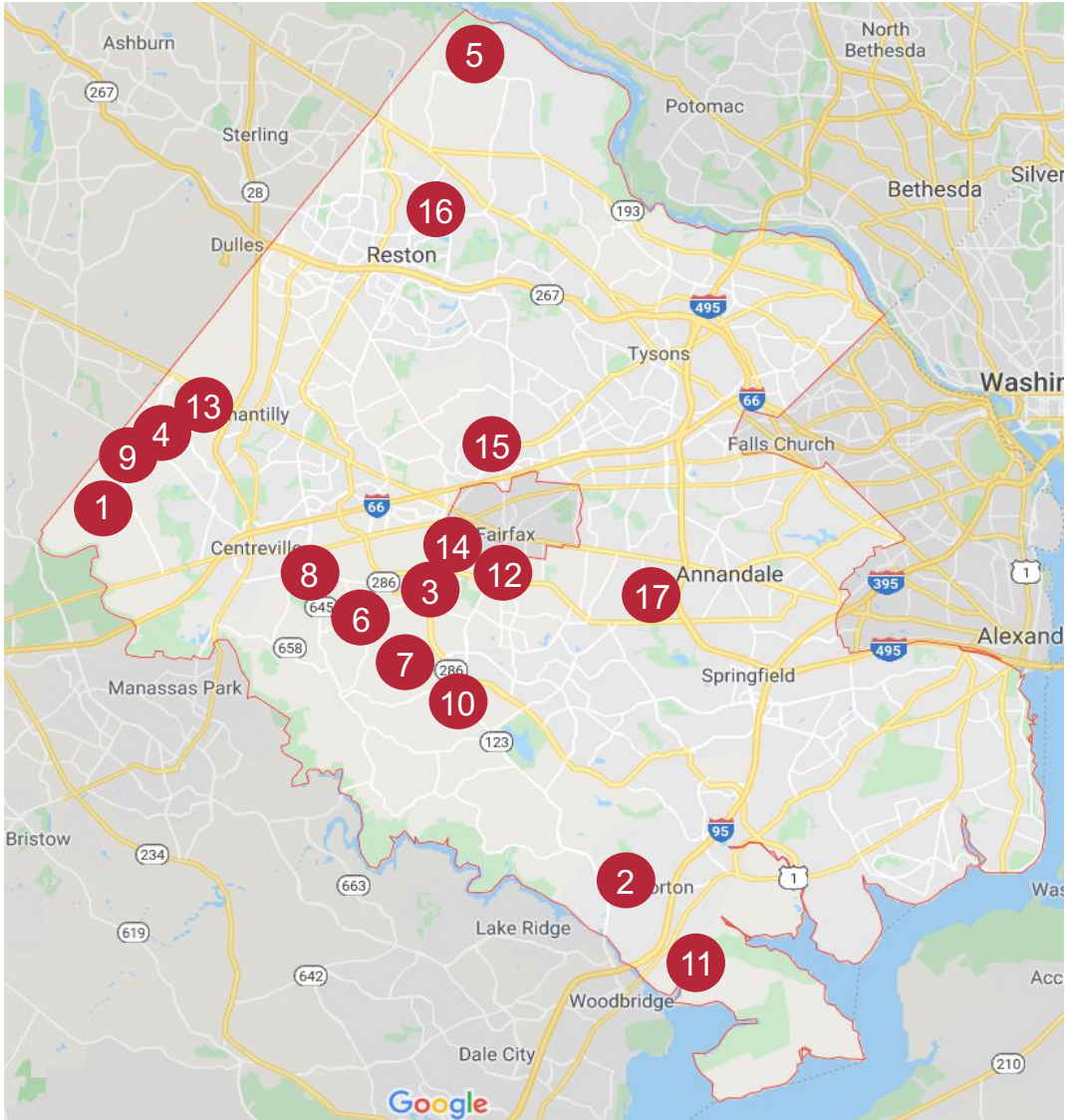
- Mount Vernon RECenter 2nd sheet expansion & improvements

PRIORITY 5

Natatorium

- New 50M competition pool + diving complex

IDENTIFIED SITES



IDENTIFIED SITES		APPROX. ACRES (GROSS)
1	Halifax Point Dist. Park	170
2	Laurel Hill Park	99
3	Patriot Park North	97
4	Rock Hill District Park	170
5	Patowmack Farm *	450
6	Vazquez Property *	168
7	Castro Farms *	118
8	OH Sang Property *	56
9	Mountain Rd. Dist. Park	200
10	Murray Property *	71
11	EDH Associates *	119
12	GMU Property *	85
13	Cub Run RECenter	37
14	Chang Property *	48
15	Oak Mar RECenter	137
16	Baron Cameron Park	60
17	Wakefield Park	40

* = Site is privately-owned or held.

SITE RANKINGS

CONCEPT PRIORITY	PRIORITY 1A	PRIORITY 1B	PRIORITY 2	PRIORITY 3	PRIORITY 4	PRIORITY 5
PROJECT	New Rectangle Field Complex with 16 fields	New Diamond Field Complex with 10 fields	New Indoor Court Facility with 12 courts	New Indoor Track Facility	Ice Complex	Natatorium
ACREAGE TARGET	96	60	15	12	5	10
PREFERRED LOCATION	North or Northwest	North or Northwest	North, Northwest, Central	North, Northwest, Central	2nd Sheet Expansion	North, Northwest, Central
ALTERNATE LOCATION	South or Central	South or Central	South	South	None	South
PREFERRED SITES (in order of rank)	4. Rock Hill District Park 9. Mountain Rd. Dist. Park 6. Vazquez Property*	4. Rock Hill District Park 9. Mountain Rd. Dist. Park 3. Patriot Park North	16. Baron Cameron Park 15. Oak Marr RECenter 12. GMU Property*	16. Baron Cameron Park 15. Oak Marr RECenter 12. GMU Property*	Mount Vernon RECenter	15. Oak Marr RECenter 17. Wakefield Park 16. Baron Cameron Park

* = Site is privately-owned or held.

PRIORITY 1A SITE CONCEPT



PROJECT:
New Outdoor
Rectangle Field
Complex with 16 fields

SITE:
Mountain Road
District Park

- Notes:
- Development scenario at Mountain Road District Park would require a Park Master Plan Revision.
 - The optimized project would consist of a newly-developed complex of all 16 fields at one site; however, a development alternative could include consideration of partnering with Fairfax County Public Schools to develop lighted synthetic turf rectangle fields at one or more existing complexes (i.e., South County Middle/High School, Laurel Hill Elementary School, Laurel Hill Park properties).

PRIORITY 1B SITE CONCEPT

4 @ full size fields, full synthetic, infield painted for baseball, adjustable bases up to 90', portable pitching mound, adjustable outfield fences (up to max 400' home to center, 320-350' home to left)
 4 @ youth size fields, full synthetic, infield painted for softball, adjustable bases up to 60', portable pitching mound, adjustable outfield fences (up to max 250' home to center, 200' home to left)
 2 @ flex fields, full synthetic, infield painted for softball, adjustable bases up to 60', portable pitching mound, adjustable outfield fences (300-320')



PROJECT:
 New Outdoor Diamond
 Field Complex with 10
 fields (see note at top)

SITE:
 Rock Hill
 District Park

PRIORITY 2 SITE CONCEPT



PROJECT:
New Indoor Hardcourt
Complex offering 12
full-sized courts

SITE:
Baron Cameron Park

Note: Development scenario at Mountain Road District Park would require a Park Master Plan Revision.

PRIORITY 3 SITE CONCEPT



PROJECT:
New Indoor Track Facility
(200-meter, 6-lane
banked track)

SITE:
Baron Cameron Park

PRIORITY 2+3 SITE CONCEPT



PROJECT:
New Combined Indoor
Hardwood Court &
Track Facility

SITE:
Baron Cameron Park

PRIORITY 4 SITE CONCEPT



NOTE: Site plan graphic is from the Mt. Vernon RECenter Feasibility Study dated July 29, 2016 prepared for the Fairfax County Park Authority by Hughes Group Architects and Ballard King Associates.

PROJECT:
Ice Complex

SITE:
Mount Vernon
RECenter

PRIORITY 5 SITE CONCEPT



PROJECT:
Natatorium

SITE:
Oak Marr RECenter

PRIORITY 1 EXPANSION CONCEPT



PROJECT:
Diamond Field
Renovation

SITE:
Braddock Park

GOVERNANCE & OPERATING MODEL

A) OWNERSHIP

It is believed that each of the recommended sports facility product priorities would be best served to be under public-sector ownership via FCPA. All of the identified project priorities involve FCPA sites and will be believed to require whole or major capital funding via Fairfax County funding sources.

B) MANAGEMENT & OPERATIONS

- Priorities 1A, 1B, 2, 3 (New Facilities)
 - Publicly-owned, privately-managed. Management is contracted to a qualified third party.
 - Facility manager reports to new Sports Tourism Facilities Board.
 - Adoption of a sports tourism-prioritized booking policy.
- Priorities 1, 4 & 5 (Expanded/Improved Facilities)
 - Publicly-owned, publicly-operated. FCPA continues to manage and oversee subject facilities.
 - Coordination with new Sports Tourism Facilities Board.
 - Adoption of a hybrid booking policy that emphasizes sports tourism, while recognizing the existing local user base at the subject facilities. Prior to respective expansion, work with existing user groups to mitigate displacement, which could include grandfathering in certain key local users during initial years.

GOVERNANCE & OPERATING MODEL

C) GOVERNANCE & OVERSIGHT

Establish a Sports Tourism Facilities Board of Directors with a formal set of bylaws to govern and oversee the new sports tourism facility complexes (Priorities 1 through 5). The Board of Directors would be similar to traditional sports authorities located throughout the country, but without independent bonding and debt financing powers.

The Board of Directors would be appointed by the Fairfax County Board of Supervisors and would consist of 13 board members from a cross-section of local industries. An example of an appropriate industry composition might include:

- 2 Visit Fairfax (tourism)
- 4 Hospitality (tourism)
- 2 FCPA (sports)
- 2 Athletic Council (sports)
- 1 Fairfax County (government)
- 1 Public Schools (academic)
- 1 Other (at-large)

GOVERNANCE & OPERATING MODEL

D) BOOKING & SCHEDULING POLICY

The booking and scheduling policy should emphasize the attraction and accommodation of sports tourism as its foremost priority. The Board will ensure that the policy is adhered to, would be able to vote on policy adjustments, and would provide strategic direction to facility management. The Board would have the ability to view the scheduling calendar for each of its subject facilities.

Key elements of the booking/scheduling policy is recommended to include the following prioritization:

- Tier One: Non-Local Tournaments (Booking Access Beyond 12 Months)
- Tier Two: Local Tournaments & Major Events (Booking Access Within 12 Months)
- Tier Three: Local Use (Booking Access Within 3 Months)

ESTIMATED CONSTRUCTION COSTS

	DEVELOPMENT PRIORITY								
	1A	1B	1	1	2	3	2+3	4	5
	RECTANGLE COMPLEX	DIAMOND COMPLEX	DIAMOND RENOVATION	DIAMOND EXPANSION	INDOOR COURTS	INDOOR TRACK ⁽¹⁾	TRACK + COURTS ⁽¹⁾	ICE COMPLEX ⁽²⁾	NATATORIUM
	Mountain Rd. District Park	Rock Hill District Park	Braddock Park	Patriot Park North	Baron Cameron	Baron Cameron	Baron Cameron	Mt. Vernon RECenter	Oak Marr RECenter
General Conditions	\$5,233,280	\$2,192,000	--	--	\$608,900	\$608,900	\$763,400	\$12,012,687	\$368,313
Site Utilities	\$1,754,950	\$1,255,950	\$192,000	\$3,451,641	\$742,000	\$742,000	\$742,000	--	\$383,000
Site Work	\$5,187,960	\$3,036,032	\$3,270,450	\$3,474,500	\$1,663,000	\$1,663,000	\$1,494,200	--	\$420,600
Playing Fields	\$11,823,725	\$8,358,335	--	\$4,161,452	--	--	--	--	--
Sports Lighting	\$2,800,000	\$3,400,000	--	\$3,329,400	--	--	--	--	--
Buildings	\$4,645,000	\$2,428,000	--	\$600,077	\$21,070,000	\$28,185,000	\$45,950,000	--	\$20,420,000
Site Amenities	\$953,200	\$953,200	--	\$149,697	--	--	--	--	--
GC/Contingency	\$10,043,416	\$6,703,290	\$1,669,527	--	\$7,466,009	\$7,379,159	\$12,881,876	\$0	\$6,693,493
Construction Costs	\$42,441,530	\$28,326,807	\$5,131,977	\$15,166,767	\$31,549,909	\$38,578,059	\$61,831,476	\$12,012,687	\$28,285,405
Soft Costs	\$8,488,306	\$5,665,361	\$1,026,395	\$3,878,921	\$6,309,982	\$9,465,612	\$14,116,295	\$2,402,537	\$5,657,081
Total Project Costs	\$50,929,836	\$33,992,169	\$6,158,373	\$19,045,688	\$37,859,891	\$48,043,671	\$75,947,771	\$14,415,225	\$33,942,486

(1) Assumes a state-of-the-industry hydraulic bank track system. Alternately, costs would be approximately \$1.75 million lower assuming a fixed bank track.

(2) Cost estimate generated by Hughes Group Architects & Ballard King Associates, inflated to current year dollars.

Note: The cost estimates were generated using industry per-unit data adjusted for conditions in Fairfax County and cost data of comparable amateur sports facility development projects, modified for time and locations. Construction costs tend to vary widely among comparable amateur sports facility projects. Many variables exist that influence actual realized construction costs, including type of facility, size, components, level of finish, integrated amenities, costs of goods and services in the local market, location and topography of the site, ingress/egress issues, and other such aspects.

Source: CHA Consulting, Inc., 2020.

ESTIMATED COSTS & BENEFITS

Key New Sports Complex Development Priorities in Fairfax County - Summary of Key Cost / Benefit Estimates

Note: All estimates (except for construction costs and debt service) represent annual figures upon stabilization of facility operations (assumed fourth full year of operation)

(1) Based on information provided by Fairfax County Department of Management and Budget, assuming a General Obligation (GO) bond offering with a term of 20 years, a blended interest rate of 4.0%, and 90% of total project costs financed (assuming 10% private participation through naming rights and/or other private sources).

	PRIORITY 1A	PRIORITY 1B	PRIORITY 2+3
	Rectangle Field Complex	Diamond Field Complex	Indoor Court & Track Complex
Location/Site	Mountain Rd.	Rock Hill	Baron Cameron
Est. Construction Costs (Hard + Soft)	\$50,929,836	\$33,992,169	\$75,947,771
Assumed Annual Debt Service ⁽¹⁾	\$3,373,000	\$2,251,000	\$5,030,000
Annual Financial Operating Profit/(Loss)	\$338,392	\$237,697	\$495,648
Number of Tournaments/Meets	38	27	130
Total Attendance (Athletes + Spectators)	692,544	410,304	812,100
Non-Local Visitor Days	263,117	145,139	319,398
Hotel Room Nights	56,382	31,101	68,442
Direct Spending	\$36,724,399	\$20,592,553	\$43,161,751
Economic Output	\$61,753,448	\$34,628,253	\$72,577,488
Employment (Full & Part-time Jobs)	790	444	928
Tax Revenue (Fairfax County Taxes)	\$4,476,445	\$2,495,352	\$5,266,376

NON-QUANTIFIABLE BENEFITS

- The development and operation of potential new and expanded sports tourism complexes would be expected to generate significant quantitative benefits to Fairfax County.
- In addition to the quantifiable benefits associated with new sports tourism product development and operation in Fairfax County, there are a number of existing and potential benefits that cannot be quantified. In fact, these qualitative benefits tend to be a critical factor in the consideration of public and private investment in facilities of this nature. These include:
 - ✓ Enhanced sports and recreation opportunities for local youth and adults.
 - ✓ Reduction in the need for residents to leave Fairfax County for sports activities.
 - ✓ Improved wellness and other health outcomes for community members.
 - ✓ Synergy with the other sports, recreation, entertainment and leisure facilities leading to increased tourism activity.
 - ✓ Enhanced community pride, self-image, exposure and reputation.
 - ✓ Enhanced regional/national exposure.