

STUDY OF SPORTS TOURISM FACILITY OPPORTUNITIES IN FAIRFAX COUNTY

November 26, 2019



INTRODUCTION: Study Overview

- Two-phased study of potential new and/or enhanced sports complexes in Fairfax County.
- Intent of the study is to assist the Sports Tourism Task Force, Fairfax County Park Authority, Visit Fairfax and other stakeholders in evaluating:
 1. Market opportunities in specific sports segments to grow sports tourism in Fairfax County.
 2. 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.
 3. 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.
- Consulting Team:
 - Conventions, Sports & Leisure International (CSL)
 - CHA Consulting, Inc. (CHA)

INTRODUCTION: 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

INTRODUCTION: Study Approach

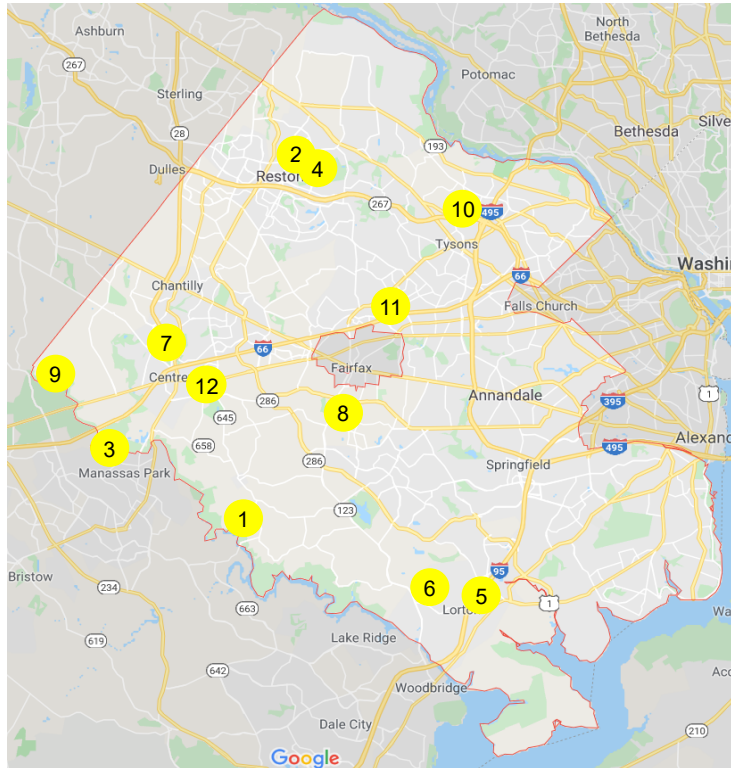
- Experience garnered through more than **1,000** sports and event facility and tourism studies throughout the country.
- Local market visits at the outset of the project, including community and facility tours, and discussions with study stakeholders.
- In-person and telephone interviews, meetings and focus groups with more than **200** individuals representing user groups and Fairfax County stakeholders, including:
 - Fairfax County Athletic Council
 - Fairfax County Park Authority
 - George Mason University
 - Neighborhood and Community Services
 - Nova Parks
 - Visit Fairfax
 - Various other recreational and amateur sporting groups
 - Local hoteliers
 - Business leaders
 - Other visitor industry and community stakeholders
 - Local and non-local tournament/competition producers
- Research and analysis of facility data and interviews conducted with **60** competitive and **24** comparable sports facilities.



INTRODUCTION: Situation & Key Issues

1. Large local and greater metro area population base and associated visitor industry infrastructure.
2. Strong destination appeal and strong national/regional accessibility.
3. Limited land/site availability within County.
4. Traffic congestion, long travel times within County's large geographic area.
5. Fragmented existing facility product, lack of sports tourism-optimized complexes.
6. Quality, capabilities, amenities and infrastructure associated with much of existing facility product is substandard relative to state-of-the-industry sports tourism products.
7. Existing scheduling, rates and field/facility reservation system works to detriment of sports tourism.
8. Growing competition of high-quality sports tourism products throughout the region and country and sophistication of efforts to attract sports tourism activity.

LOCAL FACILITY SUPPLY: Rectangle Fields

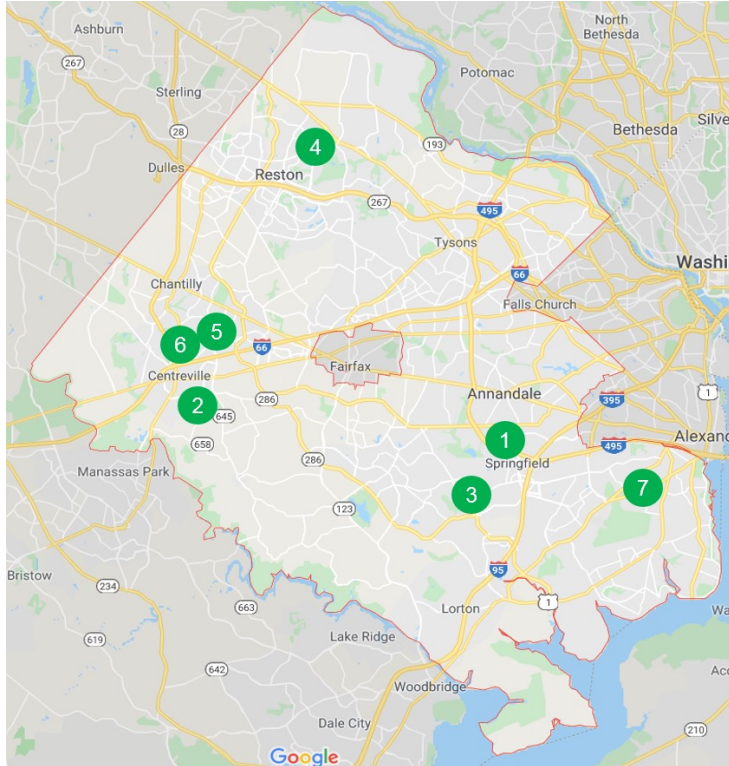


Key	Facility	Location	Rectangle Fields		
			Adult	Youth	Total
1	Kincheloe Park	Clifton, VA	5	4	9
2	Baron Cameron Park	Reston, VA	8	0	8
3	Bull Run Regional Park	Centreville, VA	6	0	6
4	Lake Fairfax Park	Reston, VA	4	2	6
5	South County Middle School	Lorton, VA	6	0	6
6	South Run District Park	Springfield, VA	3	2	5
7	Ellanor C. Lawrence Park	Chantilly, VA	4	0	4
8	GMU Recreation Fields	Fairfax, VA	4	0	4
9	SYA Sports Park	Centreville, VA	3	0	3
10	Spring Hill RECenter	McLean, VA	3	0	3
11	Oakton High School	Vienna, VA	3	0	3
12	Popes Head Park	Fairfax, VA	0	3	3

Note: Only includes complexes with three (3) fields or more.
Source: Facility Management, 2019.

LOCAL FACILITY SUPPLY: Diamond Fields

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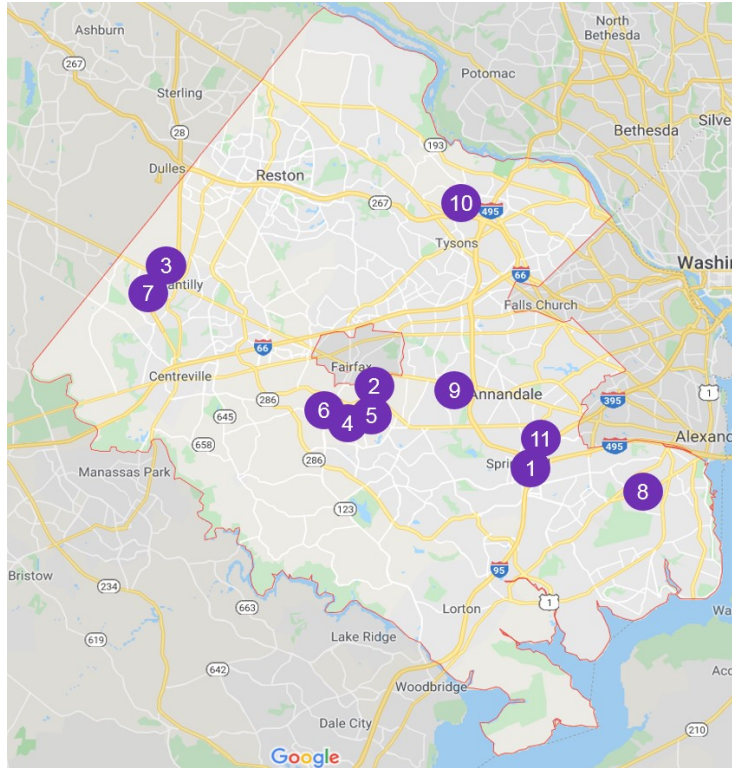


Note: Only includes complexes with three (3) fields or more.
Source: Facility Management, 2019.

Key	Facility	Location	Baseball		Softball		Total
			Adult	Youth	Adult	Youth	
1	Wakefield Park	Annandale, VA	0	0	3	3	6
2	Braddock Road Park Softball Complex	Clifton, VA	0	0	6	0	6
3	South Run District Park	Springfield, VA	0	1	0	2	3
4	Baron Cameron Park	Reston, VA	0	1	1	1	3
5	Greenbriar Park	Fairfax, VA	0	1	0	2	3
6	Ellanor C. Lawrence Park	Chantilly, VA	0	1	0	2	3
7	Lee District RECenter	Alexandria, VA	0	0	0	3	3

LOCAL FACILITY SUPPLY: Indoor Court Facilities

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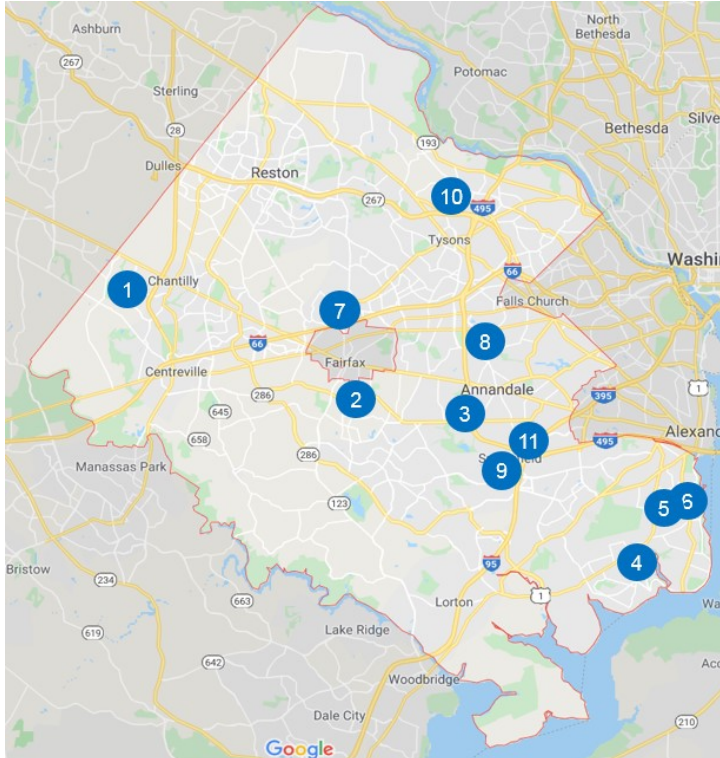


Note: Excludes high school gyms.
Source: Facility Management, 2019.

Key	Facility	Location	Basketball Courts	Volleyball Courts	Indoor Turf Fields
1	The St. James	Springfield, VA	4	9	1
2	GMU Field House	Fairfax, VA	3	0	0
3	The Fieldhouse	Chantilly, VA	3	0	2
4	RAC Complex	Fairfax, VA	3	3	0
5	Linn Gym	Fairfax, VA	2	3	0
6	GMU Basketball Practice Facility	Fairfax, VA	2	0	0
7	nZone	Chantilly, VA	2	2	3
8	Lee District RECenter	Alexandria, VA	1	0	0
9	NOVA Ernst Community Gym	Annandale, VA	1	2	0
10	Spring Hill RECenter	McLean, VA	1	0	0
11	Fairfax Sportsplex	Springfield, VA	0	4	3

LOCAL FACILITY SUPPLY: Indoor Aquatic Facilities

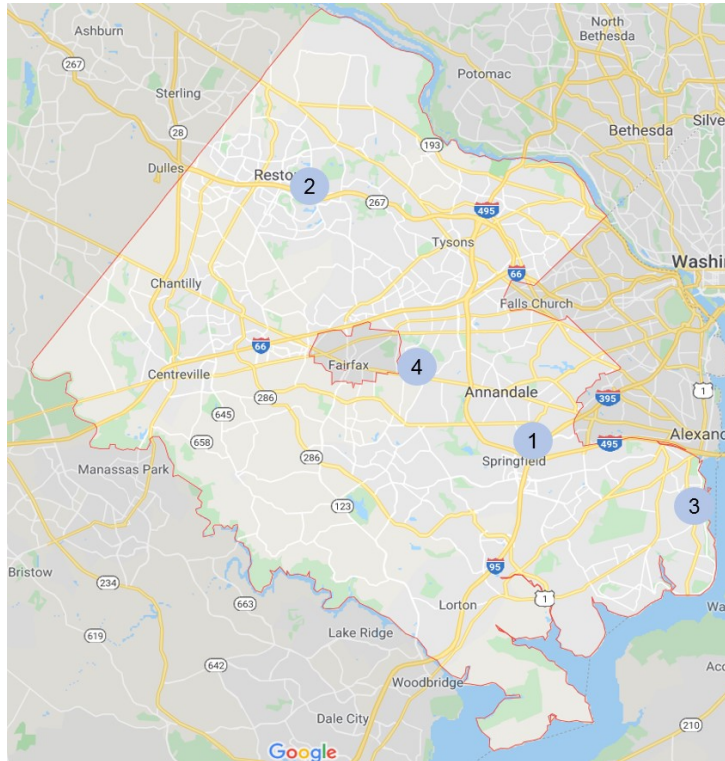
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Source: Facility Management, 2019.

Key	Facility	Location	# of Pools	Type
1	Cub Run RECenter	Chantilly, VA	2	25M & Leisure
2	GMU Aquatic & Fitness Center	Fairfax, VA	2	50M & 25M
3	Audrey Moore RECenter	Annandale, VA	1	50M
4	George Washington RECenter	Alexandria, VA	1	25yd
5	Lee District RECenter	Alexandria, VA	1	50M
6	Mount Vernon RECenter	Alexandria, VA	1	25yd
7	Oak Marr RECenter	Oakton, VA	1	50M
8	Providence RECenter	Falls Church, VA	1	25yd
9	South Run RECenter	Springfield, VA	1	25yd
10	Spring Hill RECenter	McLean, VA	1	25yd
11	The St. James	Springfield, VA	1	50M

LOCAL FACILITY SUPPLY: Indoor Ice Facilities



Source: Facility Management, 2019.

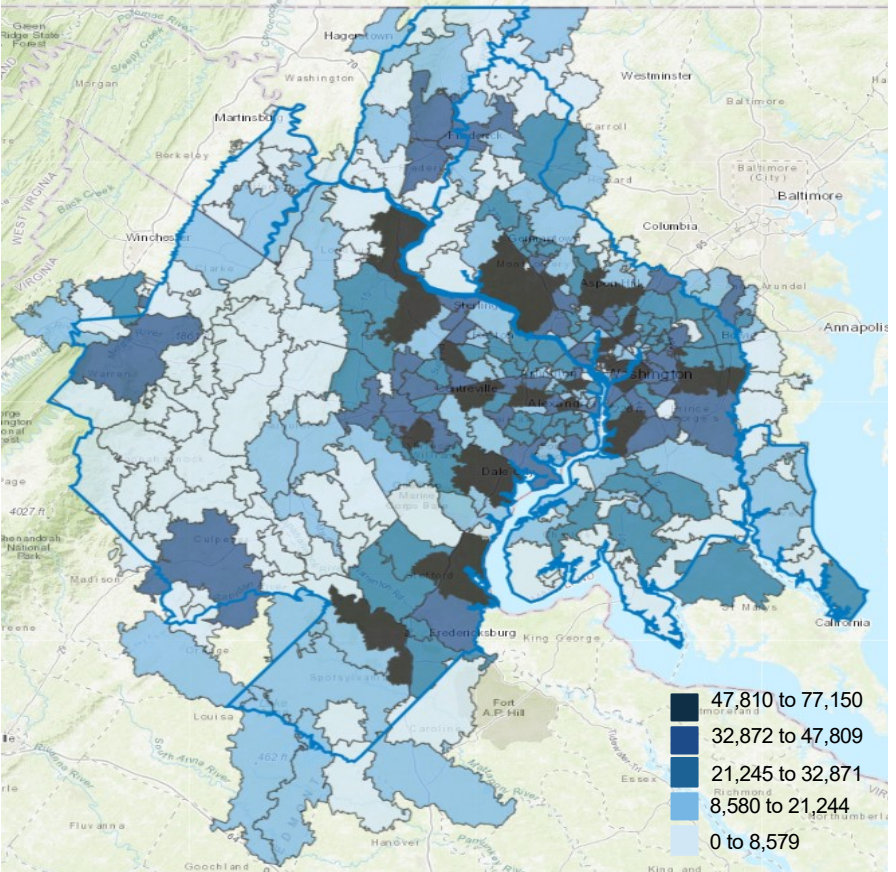
Key	Facility	Location	# of Rinks	Type
1	The St. James	Springfield, VA	2	NHL
2	Reston SkateQuest	Reston, VA	2	NHL & Olympic
3	Mount Vernon RECenter	Alexandria, VA	1	NHL
4	Fairfax Ice Arena	Fairfax, VA	1	Leisure

DESTINATION & DEMOGRAPHICS: Summary

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DEMOGRAPHIC VARIABLE	Fairfax County	Washington, D.C. CBSA	United States
POPULATION:			
2019 Total Population	1,132,004	6,249,043	332,417,793
2024 Total Population	1,161,299	6,597,430	345,487,602
Historical Annual Growth Rate (2010 to 2019)	0.5%	1.2%	0.9%
Projected Annual Growth Rate (2019 to 2024)	0.5%	1.1%	0.8%
AGE:			
Median Age	38.9	37.6	38.5
Population Age 25 to 44	27.5%	29.2%	26.6%
AGE DISTRIBUTION:			
Under 15	19.0%	18.9%	18.4%
15 to 24	11.8%	12.3%	13.0%
25 to 34	13.4%	15.0%	14.0%
35 to 44	14.1%	14.2%	12.6%
45 to 54	13.9%	13.3%	12.5%
55 and over	27.7%	26.3%	29.5%
HOUSEHOLD INCOME:			
Median Household Income	\$118,780	\$102,025	\$60,548
Per Capita Income	\$58,856	\$50,722	\$33,028
INCOME DISTRIBUTION			
\$0 to \$24,999	7.0%	10.0%	19.7%
\$25,000 to \$49,999	9.7%	12.3%	21.3%
\$50,000 to \$74,999	11.5%	13.9%	17.5%
\$75,000 to \$99,999	11.5%	12.5%	12.6%
\$100,000 to \$149,999	21.5%	20.2%	15.1%
\$150,000 or more	38.8%	31.1%	13.8%

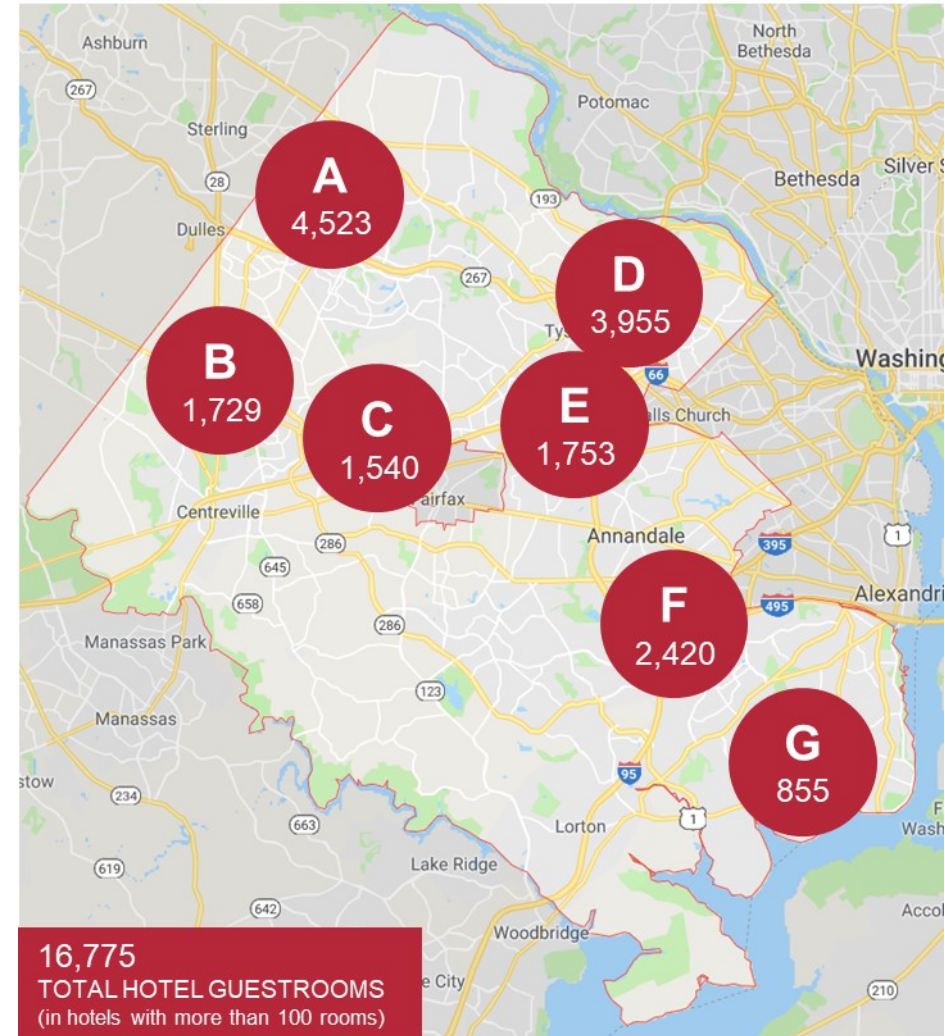
Greater Washington Metro (by Zip Code)



DESTINATION & DEMOGRAPHICS: Summary

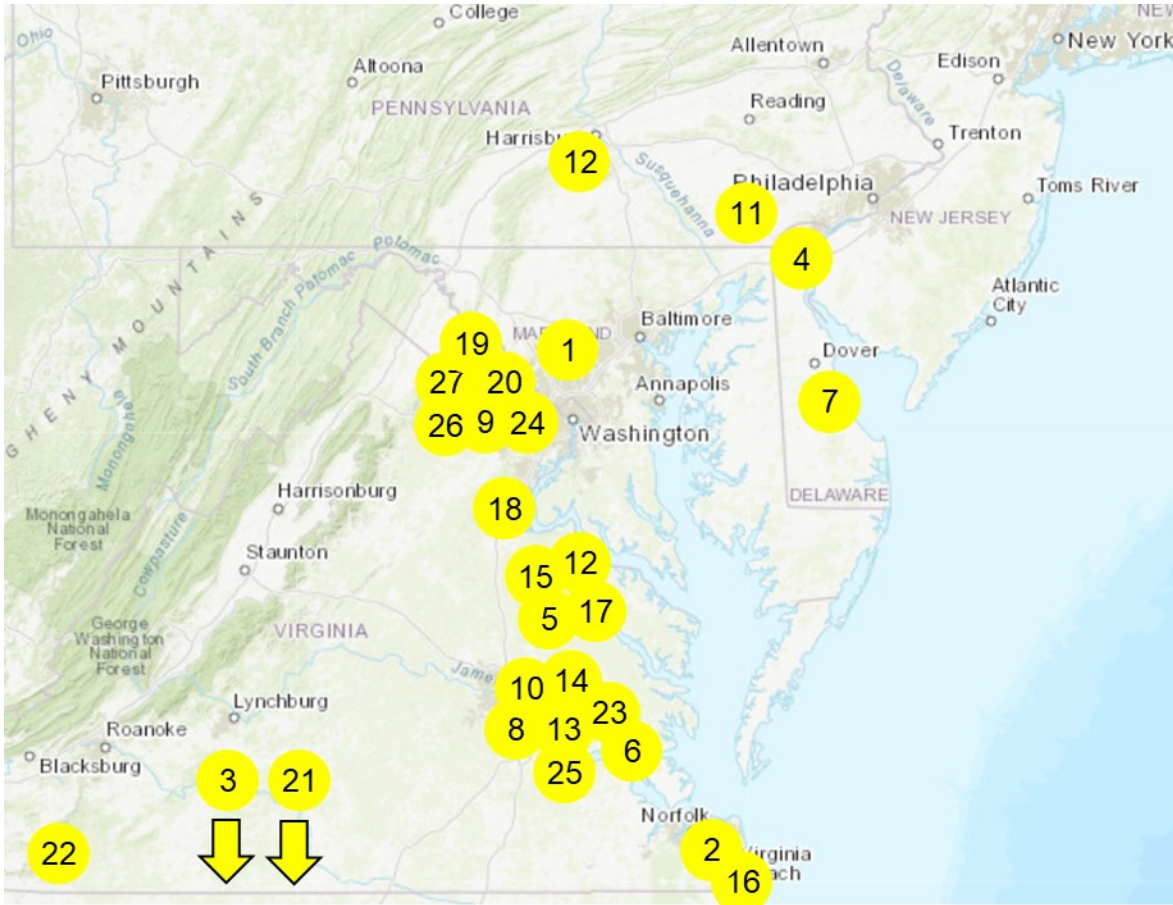
- Demographic & Socioeconomic Characteristics:
 - CBSA
 - Fairfax County
 - Submarkets
- Transportation & Accessibility
- Hotel Inventory
- Climate Conditions
- Attractions & Tourism Infrastructure

Key Hotel Product Inventory



COMPETITIVE FACILITY SUPPLY: Rectangle Fields

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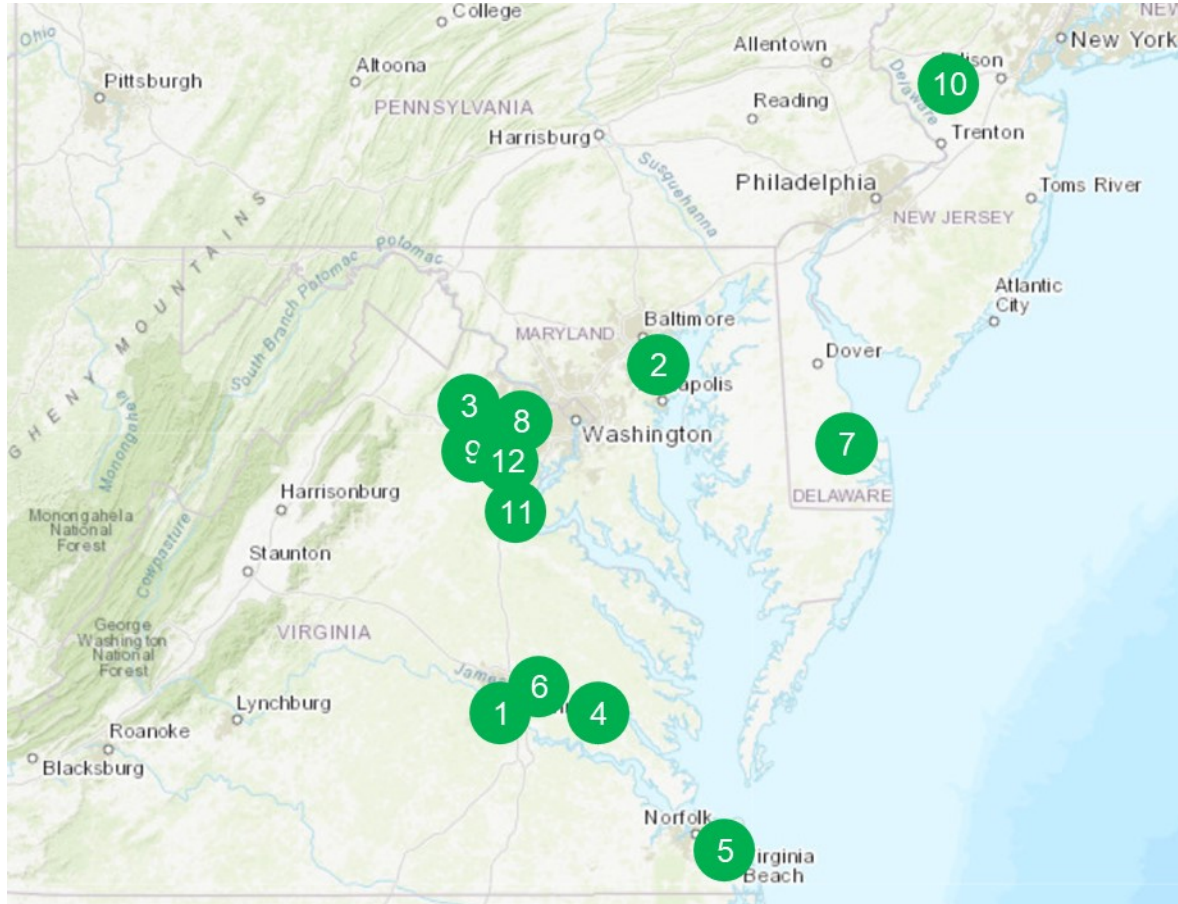


Source: Facility Management, 2019.

Key	Facility	Location	Rectangle Fields		Total
			Adult	Youth	
1	Maryland SoccerPlex	Boyds, MD	24	0	24
2	Hampton Roads Soccer Complex	Virginia Beach, VA	10	14	24
3	WRAL Soccer Park	Raleigh, NC	15	7	22
4	Kirkwood Soccer Complex	New Castle, DE	6	11	17
5	Sportsylvania Sportsplex	Fredericksburg, VA	15	0	15
6	Warhill Sports Complex	Williamsburg, VA	6	8	14
7	DE Turf Sports Complex	Milford, DE	12	0	12
8	River City Sportsplex	Midlothian, VA	12	0	12
9	Hanson Park	Leesburg, VA	11	1	12
10	Striker Park	Glen Allen, VA	6	5	11
11	United Sports	Downington, PA	3	7	10
12	PA Classics Soccer Park	Manheim, PA	10	0	10
13	Ukrop Park	Richmond, VA	9	0	9
14	Glover Park	Glen Allen, VA	8	0	8
15	Publix Virginia Soccer Training Center	Fredericksburg, VA	8	0	8
16	Princess Anne Athletic Complex	Virginia Beach, VA	8	0	8
17	Embrey Mill Park	Stafford, VA	0	8	8
18	Hellwig Park	Manassas, VA	2	6	8
19	Morven Park Athletic Park	Leesburg, VA	8	0	8
20	Phillip A. Bolen Memorial Park	Leesburg, VA	8	0	8
21	WakeMed Soccer Park	Cary, NC	5	3	8
22	Smith River Sports Complex	Axton, VA	6	0	6
23	Dorey Park	Henrico, VA	6	0	6
24	Potomack Lakes Sportsplex	Sterling, VA	6	0	6
25	Harry Daniel Park	Richmond, VA	5	0	5
26	Valley View Park	Nokesville, VA	4	0	4
27	Evergreen Sportsplex	Leesburg, VA	4	0	4

COMPETITIVE FACILITY SUPPLY: Diamond Fields

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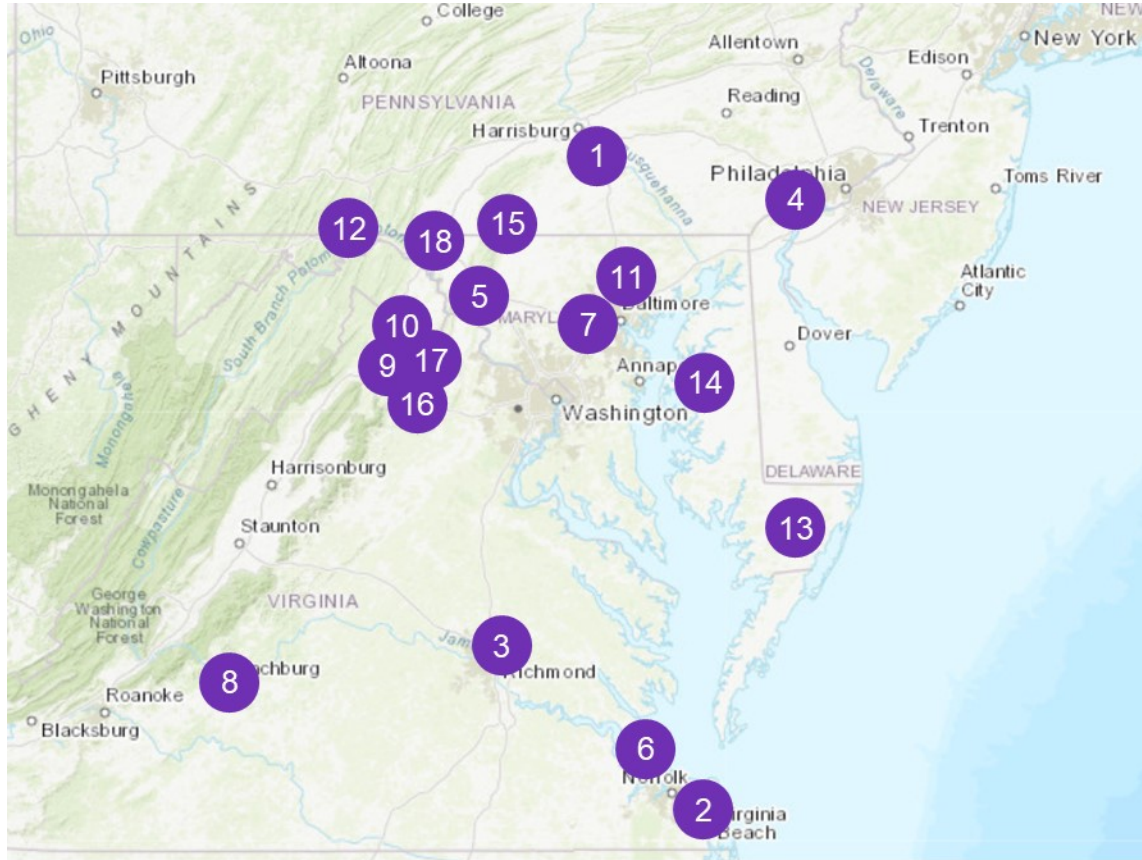


Source: Facility Management, 2019.

Key	Facility	Location	Baseball		Softball		Total Fields
			Adult	Youth	Adult	Youth	
1	Harry Daniel Park	Richmond, VA	1	1	6	12	20
2	Lake Shore Athletic Complex	Pasadena, MD	0	2	0	10	12
3	Phillip A. Bolen Memorial Park	Leesburg, VA	2	0	4	3	9
4	Warhill Sports Complex	Williamsburg, VA	1	3	0	4	8
5	Princess Anne Athletic Complex	Virginia Beach, VA	0	0	8	0	8
6	Dorey Park	Henrico, VA	1	1	4	2	8
7	Sports at the Beach	Georgetown, DE	0	6	0	2	8
8	Claude Moore Park	Sterling, VA	2	0	0	5	7
9	Brambleton Sportsplex	Ashburn, VA	4	0	0	2	6
10	Diamond Nation	Flemington, NJ	0	1	4	1	6
11	Valley View Park	Nokesville, VA	0	0	5	0	5
12	Potomack Lakes Sportsplex	Sterling, VA	0	0	4	0	4

COMPETITIVE FACILITY SUPPLY: Indoor Court Facilities

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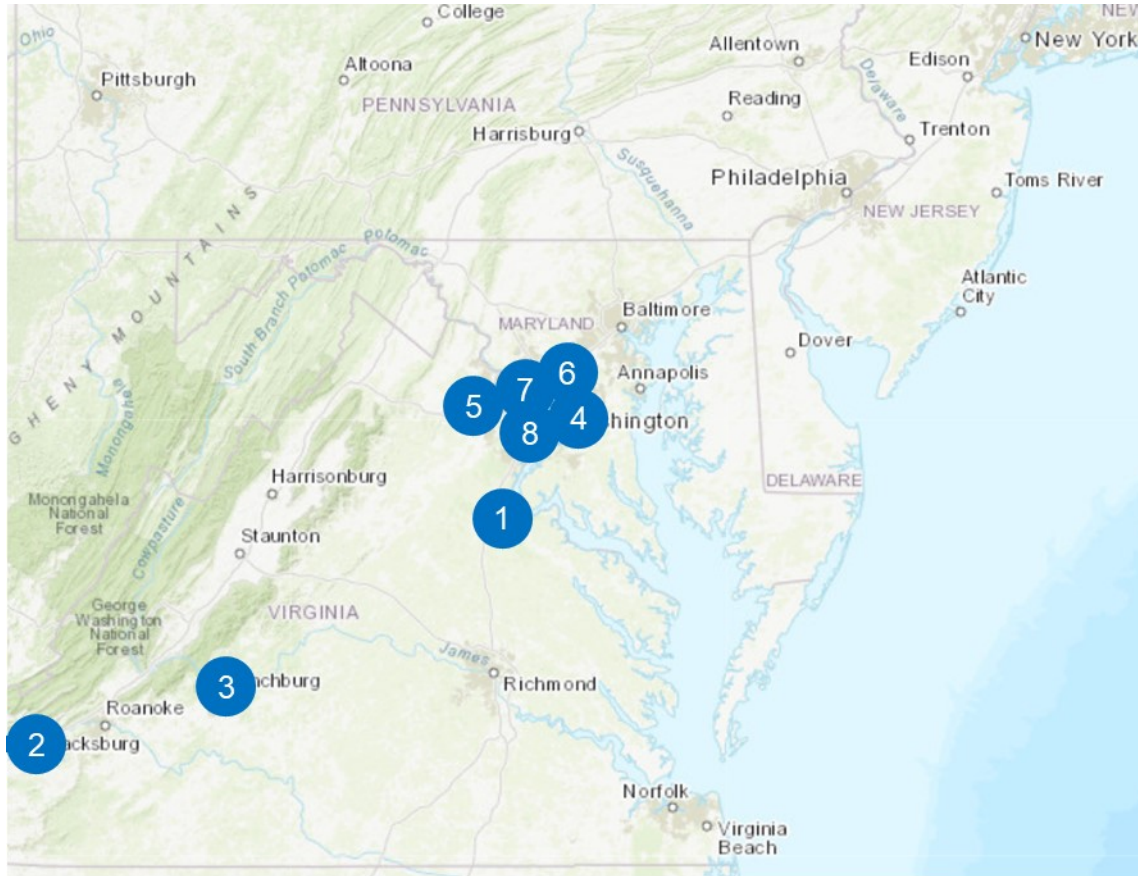
Key	Facility	Location	Basketball Courts	Volleyball Courts	Indoor Turf Fields
1	Spooky Nook Sports	Manheim, PA	20	0	1
2	Virginia Beach Sports Center	Virginia Beach, VA	12	24	0
3	Henrico Indoor Sports Facility	Henrico, VA	12	0	0
4	Huntington Park Recreation Center	Philadelphia, PA	11	0	1
5	Maryland SoccerPlex	Boysds, MD	8	8	2
6	Boo Williams Sportsplex	Hampton, VA	8	12	0
7	Meadowbrook Athletic Complex	Ellicott City, MD	4	6	0
8	Vines Center	Lynchburg, VA	4	4	1
9	The Campus	Sterling, VA	3	4	2
10	Dulles Sports Plex	Sterling, VA	3	3	3
11	Coppermine Fieldhouse	Baltimore, MD	3	0	2
12	W. Randy Smith Recreation Center	Inwood, WV	2	2	0
13	Worcester County Recreation Center	Snow Hill, MD	2	2	1
14	Queenstown Sports Center	Queenstown, MD	1	2	1
15	Carroll Indoor Sports Center	Westminster, MD	1	1	3
16	Cassel's Sports Complex	Herndon, VA	0	7	0
17	Virginia Volleyball Center	Sterling, VA	0	6	0
18	Frederick Indoor Sports Center	Frederick, MD	0	0	4

Source: Facility Management, 2019.



COMPETITIVE FACILITY SUPPLY: Indoor Aquatic

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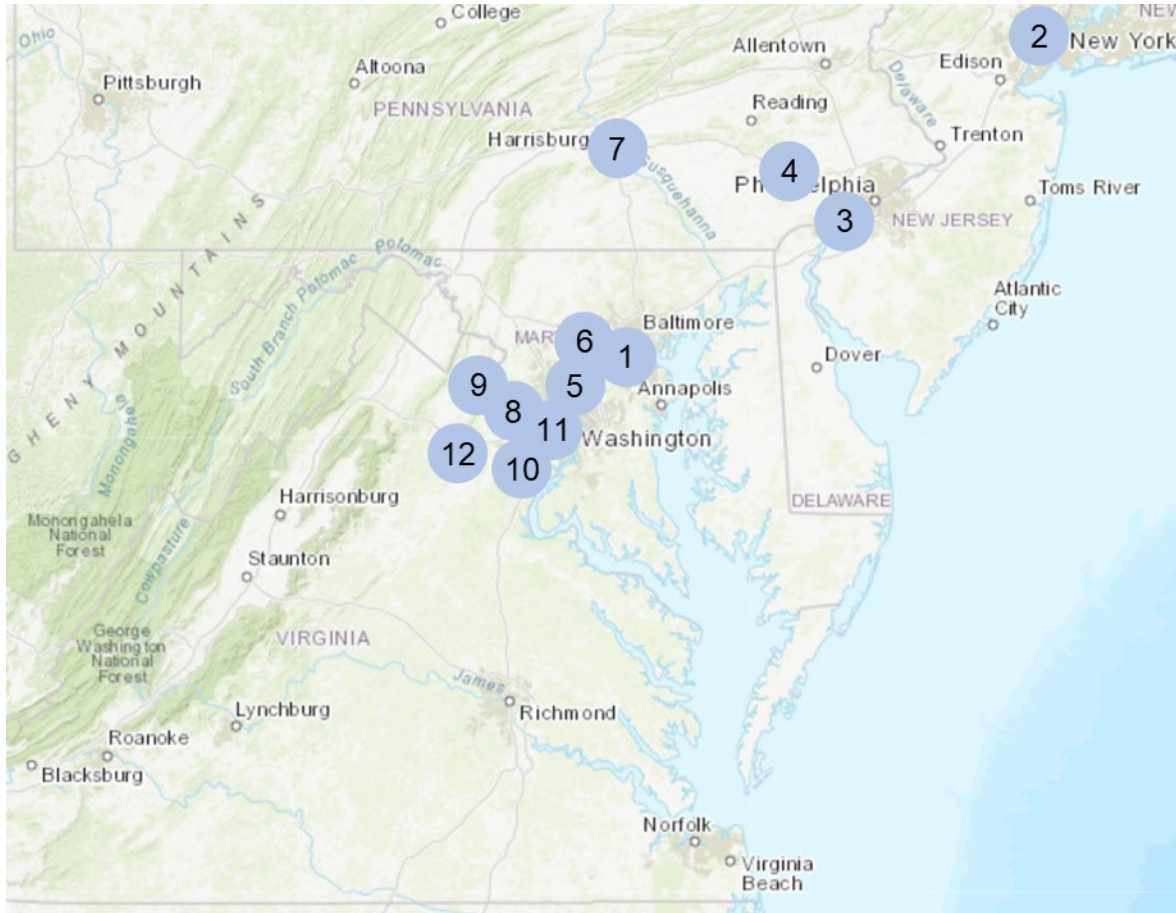
Key	Facility	Location	# of Pools	Type
1	Jeff Rouse Swim & Sports Center	Stafford, VA	3	50M, 25yd & Leisure
2	Christianburg Aquatic Center	Christianburg, VA	3	50M & Leisure
3	Liberty Natatorium	Lynchburg, VA	3	50M & Leisure
4	Prince George's Sports & Learning Center	Landover, MD	2	50M & Leisure
5	Claude Moore Rec & Community Center	Sterling, VA	2	50M & Leisure
6	Fairland Sports and Aquatics Complex	Laurel, MD	2	50M & Leisure
7	Kennedy Shriver Aquatic Center	Rockville, MD	2	50M & Leisure
8	Long Bridge Park Aquatics Center	Arlington, VA	2	50M & Leisure

Source: Facility Management, 2019.



COMPETITIVE FACILITY SUPPLY: Indoor Ice Facilities

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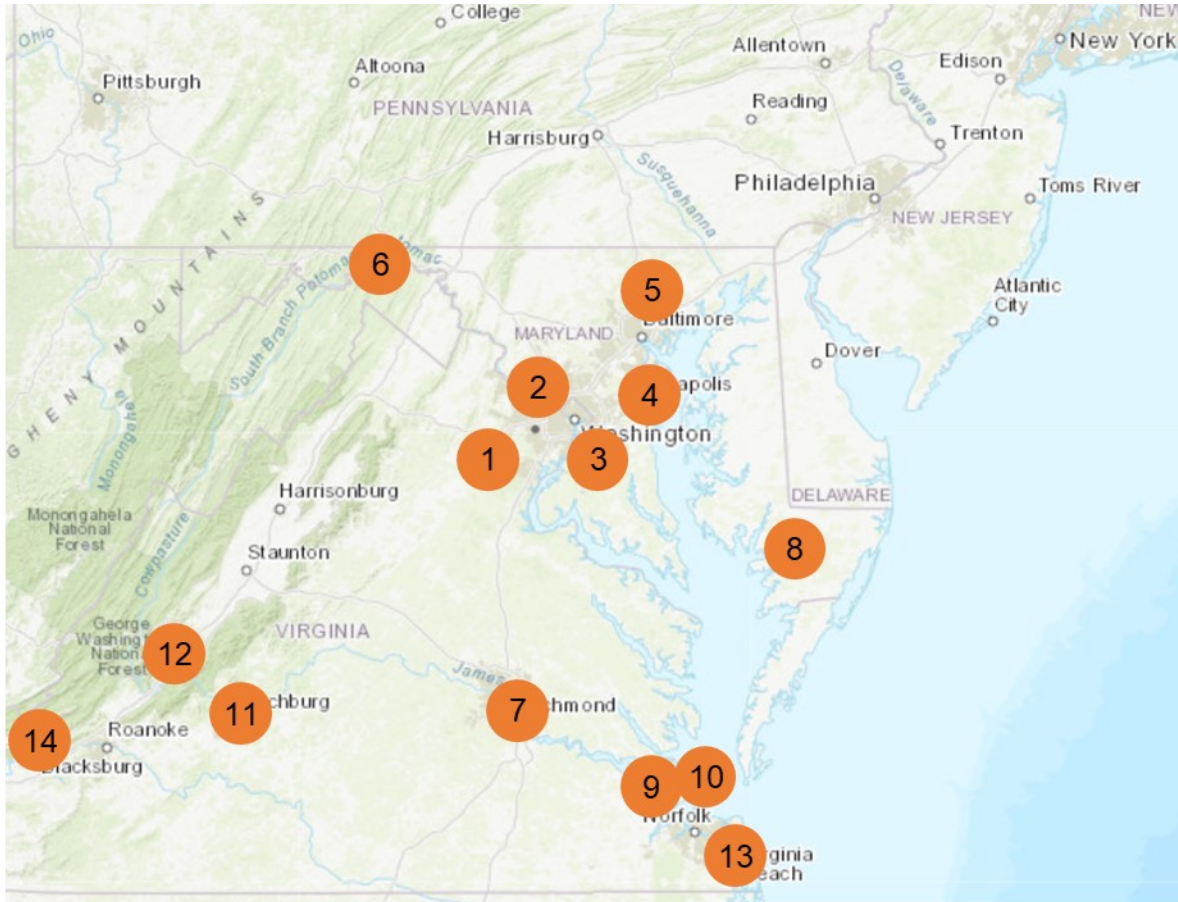


Source: Facility Management, 2019.

Key Facility	Location	# of Rinks	Type
1 The Gardens Ice House	Laurel, MD	5	2 NHL, 2 outdoor, 1 Olympic
2 Ice House	Hackensack, NJ	4	NHL
3 IceWorks Skating Complex	Aston, PA	4	3 NHL, 1 Olympic
4 Ice Line	West Chester, PA	4	NHL
5 Cabin John Ice Rink	Rockville, MD	3	NHL, Olympic, Studio
6 Rockville Ice Arena	Rockville, MD	3	NHL
7 Twin Ponds East	Harrisburg, PA	3	2 NHL, 1 Studio
8 Ashburn Ice House	Ashburn, VA	2	NHL
9 ION International Training Center	Leesburg, VA	2	NHL
10 Prince William Ice Center	Dale City, VA	2	NHL, Olympic
11 MedStar Capitals Iceplex	Arlington, VA	2	NHL
12 Haymarket Iceplex	Haymarket, VA	2	NHL, Leisure

COMPETITIVE FACILITY SUPPLY: Indoor Track & Field

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Source: Facility Management, 2019.

Key	Facility	Location	Length	Type
1	George Mason Field House	Fairfax, VA	200m	Flat
2	Georgetown Prep - Hanley Center	North Bethesda, MD	200m	Flat
3	Prince George's County Sports Complex	Landover, MD	200m	Flat
4	Navy-Wesley A. Brown	Annapolis, MD	200m	Banked
5	Towson University	Towson, MD	200m	Flat
6	Hagerstown CC-ARCC	Hagerstown, MD	200m	Flat
7	Arthur Ashe Center	Richmond, VA	200m	Flat
8	UMES - Hytche Center	Princess Anne, MD	200m	Flat
9	Christopher Newport - Freeman Center	Newport News, VA	200m	Flat
10	Boo Williams Sports Complex	Hampton, VA	200m	Flat
11	Liberty - Tolsma Indoor Track Center	Lynchburg, VA	200m	Flat
12	Virginia Military In-Cormack Field House	Lexington, VA	200m	Banked
13	Virginia Beach Sports Center	Virginia Beach, VA	200m	Banked
14	Virginia Tech-Rector Field House	Blacksburg, VA	200m	Banked

COMPARABLE FACILITIES: Overview

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Facility Name	City	Year Open	Facility Type
Aurora Sports Park	Aurora, CO	1999	Outdoor
Central Broward Regional Park	Lauderhill, FL	2007	Outdoor
DE Turf	Milford, DE	2017	Outdoor
Grand Park	Westfield, IN	2014	Outdoor/Indoor
Hampton Roads Soccer Complex	Virginia Beach, VA	1991	Outdoor
Louisville Slugger Sports Complex	Peoria, IL	2016	Outdoor
Maryland SoccerPlex & Discovery Sports Center	Germantown, MD	2000	Outdoor
National Sports Center	Blaine, MN	1990	Outdoor
Ripken Experience	Myrtle Beach, SC	2006	Outdoor
River City Sportsplex	Midlothian, VA	2011	Outdoor
Scheels Overland Park Soccer Complex	Overland Park, KS	2009	Outdoor
Woodside Sports Complex	Mauston, WI	2014	Outdoor
Bill Gray's Regional Iceplex	Rochester, NY	1998	Indoor
Cape Sportsplex	Cape Girardeau, MO	2017	Indoor
Chelsea Piers Connecticut	Stamford, CT	2012	Indoor
Community First Champion Center	Grand Chute, WI	2019	Indoor
Fieldhouse USA	Frisco, TX	2009	Indoor
Greensboro Sportsplex	Greensboro, NC	2002	Indoor
Hammond Sportsplex	Hammond, IN	2018	Indoor
Pleasant Prairie Recplex	Pleasant Prairie, WI	2000	Indoor
Reggie Lewis Track and Athletic Center	Roxbury, MA	1995	Indoor
Sports Pavilion Lawrence	Lawrence, KS	2014	Indoor
UW Health Sports Factory	Rockford, IL	2016	Indoor
Virginia Beach Sports Center	Virginia Beach, VA	2020	Indoor



INDUSTRY TRENDS: Summary

- Critical mass of high quality courts, fields & playing surfaces in one location.
- Maximization of local uses and sports tourism.
- Flexibility to accommodate the widest variety of uses.
- Synthetic turf (indoor & outdoor) is increasing accepted and expected by most tournament and local sports/rec activity.
- Growing emphasis on partnerships (equity, sponsorship and ancillary development).
- Focus on creating/enhancing the quality of sub-destinations surrounding facility complexes.
- Incorporation of quality amenities & specialty components:
 - Performance centers
 - eSports capabilities/technology
 - Restaurants/cafes/food courts
 - Fitness & wellness
 - Leisure amenities (child play areas, mini-golf, AR tech)
 - Ancillary development (hotels, retail, attractions)
- Growth of adventure tourism, along with the positive and negative impacts on existing facilities/infrastructure.



LEADERSHIP, GOVERNMENT & TOURISM PARTNERS

- Fairfax County Athletic Council
- Fairfax County Park Authority
- George Mason University
- Neighborhood and Community Services
- Nova Parks
- Visit Fairfax

SPORTS CLUBS & ORGANIZATIONS

- Alexandria Dive Club
- Alexandria Masters Swimming
- Braddock Road Youth Club
- Chantilly Youth Association
- DC Metro Area Cricket League
- Dominion Dive Club
- FC Public Schools Track and Field
- Fairfax Stars Basketball
- Fairfax/Cosmos/Virginia Cricket
- Fort Hunt Youth Athletic Association
- FXA Sports
- Glory Softball
- Great Falls Reston Soccer Club
- Herndon Optimist Club
- Legends Sports Leagues
- McLean Youth Athletics
- McLean Youth Soccer
- Northern Virginia Tennis League
- Northern VA Travel Baseball
- Reston Youth Association
- Southwestern Youth Association
- Special Olympics
- The Virginian Soccer Tournament
- USA Field Hockey
- USA Pickleball Association
- Vienna Girls Softball League
- Vienna Youth Inc.
- Washington Cricket Academy
- Washington Metro Cricket
- Women and Girls in Soccer
- Woodson Ice Hockey
- York Swim Club

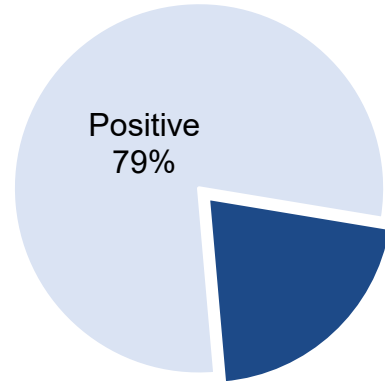
MARKET DEMAND: User Group Interviews

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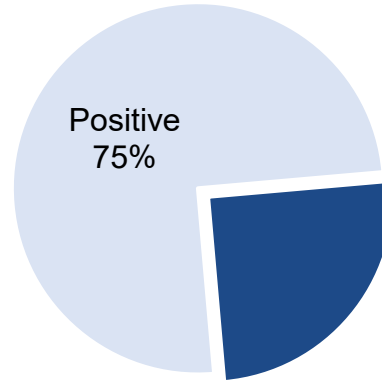
- 129 Sports, LLC
- Alexandria Dive Club
- Alexandria Masters Swimming
- Aloha Tournaments
- Amateur Athletic Union - Volleyball
- Amateur Softball Association/USA Softball
- American Collegiate Hockey Association
- American Volleyball Coaches Association
- Anthony Travel
- Balloon Federation of America
- Baseball Players Association
- Beach Rugby USA
- Bowl America
- Braddock Road Youth Club
- Brotman-Winter-Fried Communications
- Capital Region Underwater Hockey
- Capital Sports Ventures
- Capitol Hill Volleyball Classic
- CenterLane Attractions
- Central Virginia Amateur Softball Assn.
- Chantilly Youth Association
- Chesapeake & Potomac Softball
- Cowart Sports Events
- Crossfit Games
- DC Metro Area Cricket League
- Dominion Dive Club
- Elite Tournaments
- Events & Executive Sports Management
- Fairfax Adult Softball
- Fairfax Stars Basketball
- Fairfax/Cosmos/Virginia Cricket
- FC Public Schools Track and Field
- Fencing Sports Academy
- Fort Hunt Youth Athletic Association
- FXA Sports
- Glory Softball
- Great Falls Reston Soccer Club
- GWN Dragon Boat
- Herndon Optimist Club
- International Senior Softball Association
- Izaak Walton League – Arlington/Fairfax
- Joe Wootten Basketball Tournaments
- Johnny Bashir Sports Academy
- Ken Chertow Wrestling
- Legends Sports Leagues
- McLean Youth Athletics
- McLean Youth Soccer
- Mid America Youth Basketball
- Mid Atlantic Open Pickle Ball Tournament
- Mid-Atlantic Off-Road Enthusiasts
- MyHockey Tournaments
- National Beep Baseball Association
- National Club Baseball Association
- Nat'l Federation of State High School Assns.
- National Gay Basketball Association
- National Pro Fastpitch
- National Softball/Baseball Players Assn.
- Nation's Capital Area USBC Association
- Northern VA Travel Baseball
- Northern Virginia Girls Softball Association
- Northern Virginia Tennis League
- Northern Virginia Travel Baseball League
- Paintball Events Unlimited
- Pop Warner Little Scholars, Inc.
- Potomac Valley Swimming
- Reston Youth Association
- Rugged Races
- Sandy Run Regional Park
- Small Town Baseball/Softball
- Snap Sports
- Softball Players Association
- Southwestern Youth Association
- Special Olympics
- Sports Network International
- Sports Virginia
- State Wars
- Strider Sports International
- The Virginian Soccer Tournament
- U.S. Lawn Mower Racing Association
- U90C Management Group
- United States Adult Soccer Association
- United States Collegiate Athletic Association
- United States Specialty Sports Association
- USA Boxing
- USA Dance
- USA Field Hockey
- USA Gymnastics
- USA Lacrosse
- USA Pickleball Association
- USA Softball
- USA Swimming
- USA Water Polo
- Vienna Girls Softball League
- Vienna Youth Inc.
- Virginia High School League
- Virginia Scholastic Rowing Association
- Washington Area Frisbee Club
- Washington Cricket Academy
- Washington Metro Cricket
- Waupaca Boatribe Volleyball
- Women and Girls in Soccer
- Woodson Ice Hockey
- Wounded Warrior Amputee Softball Team
- York Swim Club
- Youth Basketball of America



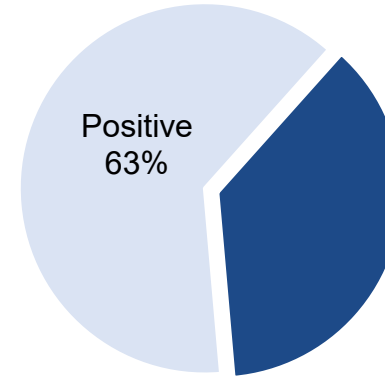
MARKET DEMAND: User Group Interviews



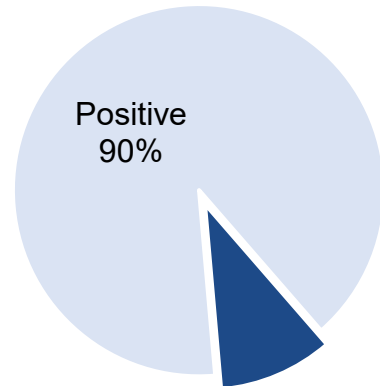
RECTANGLE FIELDS
20 interviews



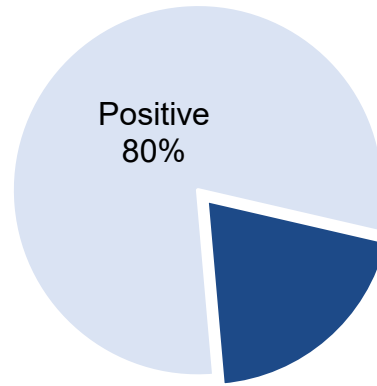
DIAMOND FIELDS
23 interviews



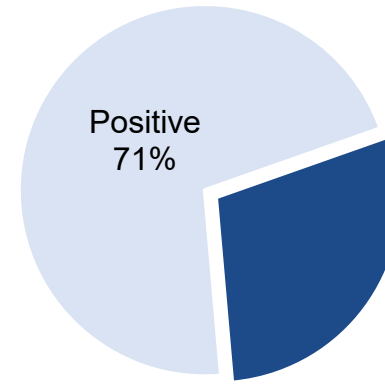
INDOOR COURTS
19 interviews



INDOOR AQUATICS
8 interviews



INDOOR ICE
7 interviews



OTHER FACILITIES
25 interviews

1) 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/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, Metro, 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 and beyond.
- **Favorable Climate** – the Fairfax County destination weather is conducive to extended seasons for outdoor activities.
- **Diversity of Sports/Rec Interests** – the large population base and diverse background of residents creates an environment where more emerging and niche sports and activities can be considered through economies of scale.
- **Visitor Industry Infrastructure** – existing base of hotel products and visitor industry attractions present an appealing destination for non-local participants.

2) WEAKNESSES

- **Existing Infrastructure Needs** – many of existing fields/facilities in Fairfax County require improvement, renovation and/or redevelopment.
- **Field/Facility Reservation System** – while the existing allocation policies work well for fairly distributing field/gym space to local and recreational sports user groups, availability and booking associated with tournaments is problematic and not aligned with industry best practices.
- **Field/Facility Maintenance** – maintenance of amateur 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 tournaments.
- **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 into a single location, making it more appealing for non-local tournaments and participants.
- **Transportation/Traffic** – nonlinear roadway connectivity & traffic congestion lead to long travel times w/i Fairfax County.
- **Limited Access to Large Development Parcels** – despite the size of the County, much of the land has been developed or is unsuitable for development of a large sports tourism complex.
- **Lack of Sports Tourism Brand Identity** – due to limitations in consolidated facility product, limited availability and fragmented management and marketing approach, an attractive sports tourism brand identity has not been established.

3) 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/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 opportunities 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 attract new tournaments, meets and non-local usage.
- **Leverage Existing/Planned Private Investment** – partnership opportunities 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.

4) CHALLENGES

- **County Size** – County service area makes it difficult to develop a one-size-fits-all approach.
- **Sustainability of Existing Amateur and Recreational Sports Facility Infrastructure** – the continued sustainability of operating existing 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 facility.
- **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.

FACILITY PRODUCT RECOMMENDATIONS

PRIORITY 1

Outdoor Field Complexes

- New Complexes:
 - Rectangle Field Complex with 14-16 fields
 - Diamond Field Complex with 8-12 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 8-12 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

PHASE TWO (modified): Cost/Benefit, Site & Governance Analysis

1. Refined Facility Recommendations
2. Analysis of Sites
3. Identification of Scenarios
4. Partnership Opportunities
5. Governance Issues
(Ownership, Management, Booking Priorities/Policies, Collaboration/Coordination)
6. Utilization Estimates
7. Cost Analysis
(Construction & Operations)
8. Economic Impact Analysis
9. Delivery of Reports & Presentations