hunden strategic partners

Williamson County Convention and Visitors Bureau
Indoor/Outdoor Multisport Complex Market and Feasibility Study

Submitted to:

Ellie Westman Chin
President and CEO
400 Main Street Suite 200
Franklin, TN 37064

January 20, 2017

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Ellie Westman Chin
President & CEO
Williamson County Convention and Visitors Bureau
400 Main Street, Suite 200
Franklin, TN 37064

Dear Ms. Westman Chin,

The Williamson County Convention and Visitors Bureau engaged the Hunden Strategic Partners Team (Team or HSP), including sports architecture and design firm Sink Comb Dethlefs, to conduct a market and financial feasibility study for new potential youth and amateur multisport complex for both indoor and outdoor sports. The objective of the study is to determine the needs, programming and performance of a youth and amateur multisport facility or complex in Williamson County. The attached is our report.

This deliverable has been prepared under the following general assumptions and limiting conditions:

- The findings presented herein reflect analysis of primary and secondary sources of information that are assumed to be correct. HSP utilized sources deemed to be reliable, but cannot guarantee their accuracy.
- No responsibility is taken for changes in market conditions after the date of this report and no obligation is assumed to revise this report to reflect events or conditions occurring after the date of this report.
- HSP has no control over construction costs or timing of construction and opening.
- Macroeconomic events affecting travel and the economy cannot be predicted and may impact the development and performance of the project.

We have enjoyed serving you on this engagement and look forward to providing you with continuing service.

Sincerely yours,

Hunden Strategic Partners

INTRODUCTION

The Williamson County Convention and Visitors Bureau (WCCVB) engaged Hunden Strategic Partners (HSP) to conduct a market and financial feasibility study for a new youth and amateur multisport complex to meet the current and future needs of the community and entice regional competitive sports spending in the County. The County recently lost a privately-owned youth sports complex, A-Game, resulting in a loss of approximately $2 million in annual hotel/motel tax revenue collections. When the youth complex closed, the County lost 12 volleyball courts, six basketball courts, and the only two sheets of ice available in the County. Currently, Williamson County lacks the proper facilities to accommodate both regional and national sports tournaments.

The purpose of the study is to determine the market opportunity in Williamson County for a new multisport complex. The study analyzed existing and competitive facilities in the local, state and regional markets to identify gaps in quality and supply. HSP also identified and studied public and private examples of indoor and outdoor athletic facilities that would likely not be directly competitive, but are similar or exemplary from around the nation.

The demand analysis of this study included an assessment of how the climate, existing facilities and access issues impact the opportunity for Williamson County to leverage its existing strengths and expand its sports offerings. The analysis covered both indoor and outdoor sports, as well as tournaments. HSP met with key stakeholders, interviewed and surveyed existing and potential facility users, analyzed the competition, reviewed the physical and calendar situation four tournaments, analyzed the market, investigated comparable situations and worked within site parameters to identify an optimal development program.

The findings indicate that there is demand and opportunity for additional outdoor facilities for soccer, baseball and softball events. Given the quality and capacity of the recommended new facility, opening the door to inducing major new regional tournaments should be highly achievable. In addition, the study includes a recommendation for an indoor sports facility that includes two scenarios based on the uncertain future of A-Game.

Based on the comprehensive analysis of the market, the needs of tournaments and leagues, the projected development of competitive and recreation athletic facilities, and the overall market, HSP's recommendations are targeted to meet the WCCVB's mission to provide a state-of-the-art venue that can provide adequate sports opportunities and economic impact for the local community and be a platform for regional and national events.

A new outdoor youth sports complex and/or an indoor athletic facility would serve a local audience well and tap into an already strong regional demand in youth sports, along with providing a space for soccer, baseball, softball and other field events as well as basketball, volleyball, hockey and other indoor events. Partnering with local hotels is one important key to creating quality visitor experience, considering the nearby accommodations.

A new athletic complex development is intended to optimize Williamson County's ability to attract tournaments and, if possible, to support local sports organizations. The primary questions that HSP aimed to answer were:

- Is there enough potential activity and demand in the market to support the development of a youth indoor and outdoor sports complex, given the climate, location, and market for traveling youth sports tournaments?
- Are there tournaments that would improve or expand their activity at a new complex in Williamson County?
- How much would a recommended indoor and outdoor complex cost and would it need ongoing financial support beyond the initial development?
- How would this ongoing youth sports activity benefit the area? What impacts are expected?
- What are the optimal governance options for the facilities to ensure success?
- What are the potential revenue sources to fund the construction and ongoing operations of the sports facilities?

Many cities have used youth sports complexes as activity and demand generators to enhance their communities and overall development efforts. Youth sports complexes (which are also used by adult tournaments) can generate consistent activity, which results in hotel room nights and restaurant spending, especially on weekends.

The facilities themselves must be able to generate enough events on the calendar to keep it operating without significant financial support. Almost no sports complex can completely pay for itself, so the design and operating concept of any new facilities should ensure that they can maximize revenues and minimize expenses.

Headlines

As a result of the analysis, HSP offers the following headlines:

An Outdoor Sports Complex Should Be Developed. Considering the market supply and demand for outdoor sports in Williamson County, a new facility will accommodate sports groups that are currently unable to find proper facilities for local use and especially for tournaments.

An Indoor Sports Complex Should Be Developed. Based on the A-Game facility situation, the size and scope of the indoor facility will be impacted, but an indoor sports facility is needed in the market. If A-Game remains closed, the new indoor facility will accommodate local and tournament demand. However, if A-Game re-opens, the new indoor facility is expected to accommodate local play and partner with existing facilities in the market to attract larger tournaments.

The Indoor and Outdoor Sports Complexes' Location Will Be Important. Sports and event facilities benefit when located in close proximity to a community's hospitality package. Amenities such as hotels, restaurants, and access to major transportation routes are attractive for event planners. Additional criteria that can impact the feasibility of a project include site ownership/control, cost of acquisition (if any), as well as site work and construction costs.

Recommendations

Outdoor Sports Complex Recommendations

HSP recommends that Williamson County community develop the program summarized in the following table. The table includes a full build out scenario and a two-phased build out scenario.

Table 1

Williamson County Athletic Complex - Outdoor Recommendations

Facility	Full BuildOut	Phased Build Out	
		Phase I	Phase II
Multipurpose Fields	24	12	12
Synthetic Turf	8	4	4
Natural Grass	16	8	8
Baseball/Softball Diamonds	12	8	4
Concession/Restrooms	5	3	2
Circulation, Amenities	✔	✔	✔
Parking Spaces	3,600	2,000	1,600

Source: Hunden Strategic Partners

The following table shows the estimated project costs the two scenarios.

Table 2

Williamson County Athletic Complex - Outdoor Cost Estimates

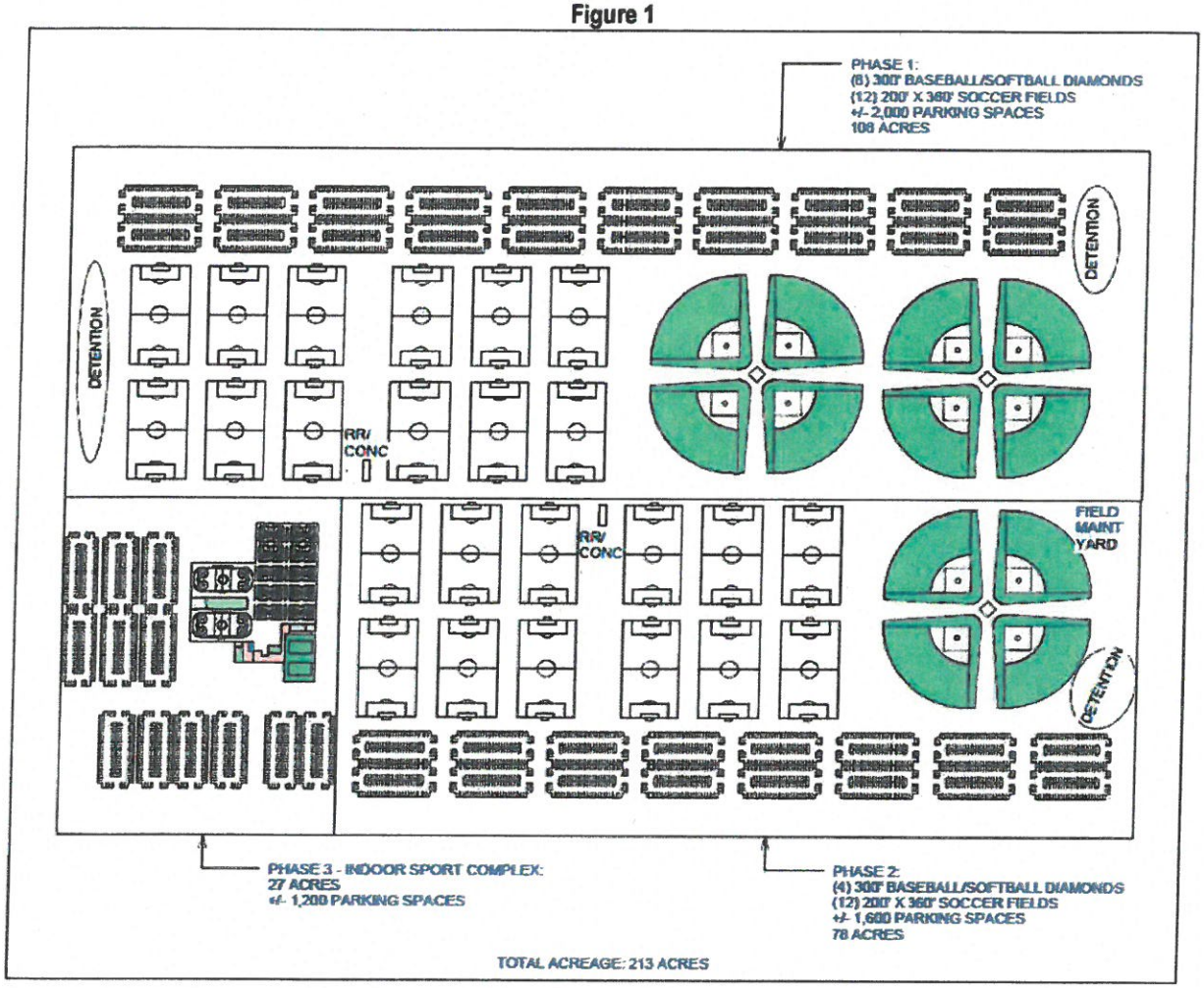
Item	Full Build-Out	Phased Build Out	
		Phase I	Phase II
General Requirements	$545,000	$328,000	$217,000
Construction Costs	$42,544,000	$24,656,000	$17,888,000
Project Costs	$17,869,000	$10,356,000	$7,513,000
Total*	**$60,958,000**	**$35,340,000**	**$25,618,000**

*Facility Costs Only, Escalated to reflect 2018 dollars

Source: Sink Combs Dethlefs, Hunden Strategic Partners

The following figure presents a diagram of the recommended outdoor facilities. The facilities allocated in each phase of the build-out are noted.

Figure 1


PHASE 1:
(6) 300' BASEBALL/SOFTBALL DIAMONDS
(12) 200' X 360' SOCCER FIELDS
+/- 2,000 PARKING SPACES
108 ACRES
DETENTION
DETENTION
RR/
CONC
RR/
CONC
FIELD
MAINT
YARD
DETENTION
PHASE 3 - INDOOR SPORT COMPLEX:
27 ACRES
+/- 1,200 PARKING SPACES
PHASE 2:
(4) 300' BASEBALL/SOFTBALL DIAMONDS
(12) 200' X 360' SOCCER FIELDS
+/- 1,600 PARKING SPACES
78 ACRES
TOTAL ACREAGE: 213 ACRES

Indoor Sports Complex Recommendations

The indoor facility recommendations include two scenarios that are dependent upon the future of A-Game. The following table shows the indoor facility recommendations if the A-Game facility remains closed or if it re-opens.

Table 3

Williamson County Athletic Complex - Indoor Recommendations

Facility	A-Game Remains Closed	A-Game Re-Opens*
Hardwood Courts		
Basketball Courts	10	4
Volleyball Courts	20	8
Ice Sheets	2	1
Indoor Turf Fields	2	2
Circulation, Amenities, Concessions	✔	✔
Locker Rooms	✔	✔
Parking Spaces	1,200	800

*Recommendations are in addition to A-Game facility

Source: Hunden Strategic Partners

The following table shows the cost estimates for a full build-out indoor athletic facility, based on the A-Game facility remaining closed.

Table 4

Williamson County Athletic Complex - Indoor Cost Estimates

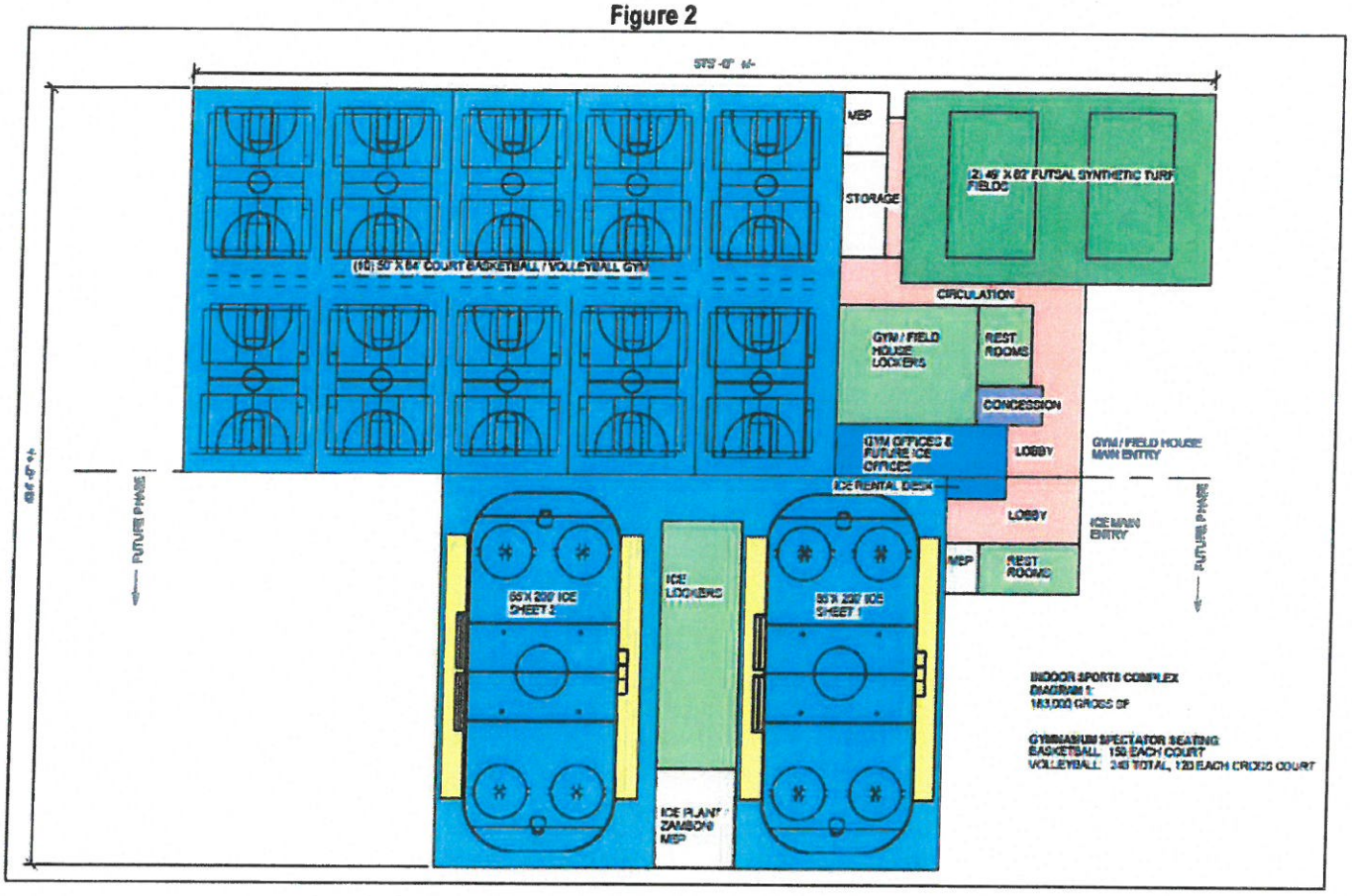
Item	Full Build Out
General Requirements	$2,183,000
Construction Costs	$44,251,000
Project Costs	$19,158,000
Total*	**$65,593,000**

*Facility Costs Only, Escalated to reflect 2018 dollars

Source: Sink Combs Dethlefs, Hunden Strategic Partners

The following figure shows a sample layout for the full build out of the basketball, volleyball, multipurpose turf fields and two sheets of ice.

Figure 2



The following table summarizes HSP's recommended prioritization of the scenarios presented.

Table 5

Williamson County Development Priority Recommendations

Priority	A-Game Remains Closed	A-Game Re-Opens
1	Indoor - Scenario One	Outdoor - Scenario One
2	Outdoor - Scenario One	Outdoor - Scenario Two
3	Outdoor - Scenario Two	Indoor - Scenario One

Source: Hunden Strategic Partners

Demand and Financial Projections

HSP provided estimates of the four scenarios outlined above: outdoor full build out, outdoor two-phased development, indoor full build out, and indoor modest build out. The projection model assumes the outdoor sports complex facility will primarily cater to field sports, such as soccer and lacrosse, and diamond sports. The projection model assumes the indoor sports complex will primarily cater to basketball, volleyball, indoor turf and hockey. The facilities have been programmed to not only accommodate major events, but also attract area clubs, organizations, and local tournaments for each sport.

The following table summarizes the four scenarios.

Table 6

Williamson County Sports Complex - Stabilized Event Summary

	Outdoor Scenarios		Indoor Scenarios	
Net New	**Full Build Out**	**Phased Build Out**	**A-Game Closed**	**A-Game Re-Opens[a]**
Events	407	403	101	82
Tournaments	82	78	46	43
Attendance	243,832	239,089	335,300	146,900
Revenues (000s)	$1,731	$1,685	$2,342	$1,410
Expenses (000s)	$2,031	$2,100	$2,593	$1,871
Net Operating Income (000s)	($299)	($415)	($250)	($462)

Source: Hunden Strategic Partners

Economic, Fiscal & Employment Impact Analysis

While many facilities that draw tourists and visitors only break even or even lose money from operations (such as convention centers, sports facilities, etc.), the impact of the visitors on the community can be significant. The impact from spending on hotels, restaurants, stores and gas stations can generate hundreds of jobs and large tax benefits from local use taxes.

While the gross operations of each facility will generate sales tax and hotel occupancy tax, and will support new jobs onsite, the critical analysis is to determine the amount of net new spending generated by each facility and what that supports in net earnings, jobs and what it generates in net new taxes. In this chapter, the net new Williamson County impacts are assessed.

The basis for the impacts will be visitor days at the facility. A visitor day is defined as the aggregate number of visits to the facility annually. For example, if someone visits the facility each day of a two-day event, two visitor days will be counted rather than counting the one visitor attending an event, regardless the number of event days. Additionally, the net new room nights generated due to each scenario as well as the incremental spending associated with existing visitors who spend more because of their visit to the new facility will inform the impact projections. The net new visitors may be staying in other hotels as well, like sports teams that now are coming to Williamson County because tournaments can now happen as well as elsewhere that otherwise would not have occurred.

The following table provides a summary of impacts for all four scenarios considered in the analysis.

Table 7

Williamson County Sports Complex - Summary of 20-Year Impacts

	Outdoor Scenarios		Indoor Scenarios	
Net New	**Full Build Out**	**Phased Build Out**	**A-Game Closed**	**A-Game Re-Opens***
Hotel Room Nights	1,027,031	916,714	1,183,101	490,387
Total Spending (millions)	$778	$706	$698	$290
Total Earnings (milions)	$195	$177	$171	$71
FTE Jobs	889	852	929	387
County Taxes Collected (millions)				
Sales Tax (2.25%)	$11,275	$10,240	$9,994	$4,152
Hotel Tax (4.0%)	$7,282	$6,617	$8,305	$3,450
Total Taxes Collected	$18,557	$16,857	$18,299	$7,602

*Recommendations are in addition to A-Game facility

Source: Hunden Strategic Partners

HSP modeled each scenario and based on the projections of the proforma, additional impact data was derived. The key components of visitation and spending are generated by overnight stays as well as day trips. HSP uses the IMPLAN input-output multiplier model, which determines the level of additional activity in the Williamson County economy due to additional inputs. For example, for every dollar of direct new spending in Williamson County, the IMPLAN model provides multipliers for the indirect and induced spending that will result.

The next portion of this executive summary includes key elements and conclusions from the report.

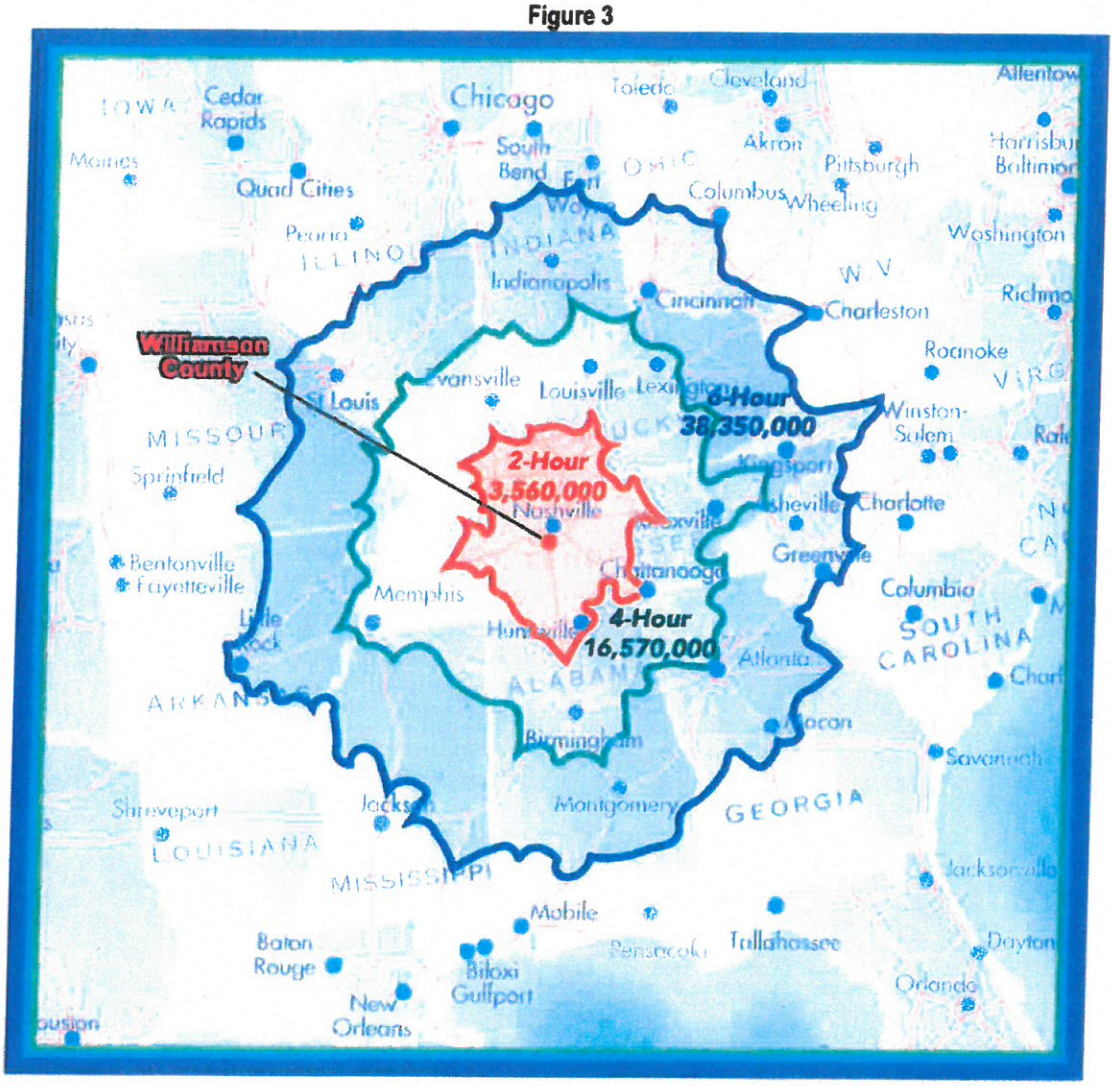
SUMMARY OF CONCLUSIONS FROM CHAPTERS

Economic, Demographic & Tourism Analysis of Williamson County

Nashville, and adjacent Williamson County, are situated at a major crossroads of the mid-south region, as well as the entire eastern half of the nation. Both Nashville and Williamson County straddle I-65 as it makes its way from the Chicago area south through Indianapolis and Louisville to Nashville and Williamson County, eventually connecting southward to Huntsville, Birmingham, and Mobile at the Gulf of Mexico. The section from Chicago to Nashville is among the nation's busiest freight highways, in addition to normal passenger traffic.

The following figure shows a drive time radius from Williamson County.

Figure 3



Williamson County's central location to most of the U.S. population and easy interstate access make it an attractive destination. There are 13 states that are within a six-hour drive from Williamson County.

The table below shows population changes in the United States, Tennessee the MSA and Williamson County.

Table 8

Population and Growth Rates

	Population				Percent Change
	1990	2000	2010	2015 Estimate	2000-2015
United States	248,709,873	281,421,906	308,745,538	321,418,820	14.2%
Tennesee	4,877,185	5,689,283	6,346,105	6,600,299	16.0%
Nashville-Davidson-Murfreesboro-Franklin MSA	985,026	1,381,287	1,670,890	1,830,345	32.5%
Williamson County	81,021	126,638	183,182	211,672	67.1%
County Pop. As % of Metro Area	*8.2%*	*9.2%*	*11.0%*	*11.6%*	–

Source: U S. Census Bureau, Hunden Strategic Partners

The centralized location of the Nashville metro area amongst other cities and population centers, along with its connectivity from nearly every direction, creates a positive situation for any project that aims to attract thousands of people from across a region. Although airport connectivity is a less important aspect of youth sports tournament facility development, a growing major airport adds to the ease of travel for some, and has peripheral advantages to the community.

A bourgeoning tourism scene in Nashville adds to the overall appeal for the parents of athletes and coaches to bring their teams to spend a weekend in Williamson County. Additionally, economic indicators such as higher-than-average incomes, median home values that nearly double that of the national average, numerous high-paying industries and corporate offices, the lowest unemployment rate in the region, and high rates of employment growth all suggest that the fortunes of Williamson County and its suburban developments will continue to grow and remain sturdy against any economic downturn.

It is difficult to find a more appropriate county or location, possibly in the entire nation, for a new, large, high-quality youth athletic tournament facility. Not only is Nashville coming into it's own as a nationally-known major city, but it has an agreeable climate for supporting a long-season of outdoor tournaments. More specific to Williamson County, this particular portion of the Nashville metropolitan area is best-suited for this kind of development due to its high-quality demographics, excellent highway connectivity, economic and population growth, tourism and retail-and-restaurant offerings. A well-run youth athletic facility located with prominent visibility and close to wide access roads off of a major highway would be a tremendous and successful asset to the community.

Local Sports Facility Supply and Demand Analysis

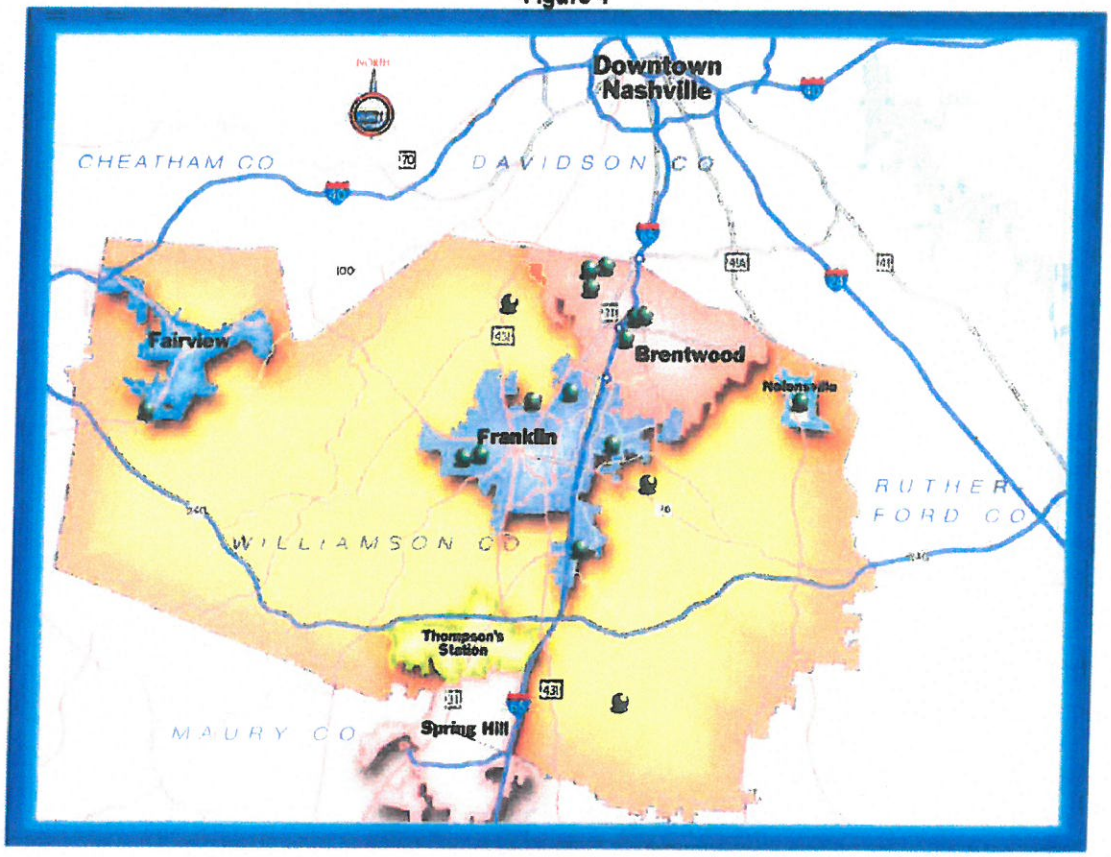
HSP evaluated the local indoor and outdoor sports facilities to determine both the supply of local sports facilities as well as the existing demand to understand if more facilities are needed to support local use. Additionally, HSP analyzed how existing facilities handle current tournament demand in order to understand if a new facility is needed in the area.

Various athletic facilities, primarily outdoor, exist throughout Williamson County. The existing sports facility supply in Williamson County is mostly recreational in nature, with only a few facilities that are capable of accommodating large tournaments. As the sports tourism market continues to grow, local facilities are expanding from small recreational parks with a few fields or courts to large tournament facilities that are drawing teams from out-of-state.

Locally, the area offers a few sports facilities that can compete with regional facilities to host regional and national tournament events. In addition to any proposed development, existing facilities may complement a new sports complex development as practice venues or overflow facilities.

HSP identified 17 relevant facilities in Williamson County that primarily serve the area. The following figure shows the relevant sports and recreation facilities in Williamson County.

Figure 4



The supply of local sports and recreational facilities are located in the cities of Franklin, Brentwood, Thompson's Station, Nolensville, Fairview and Spring Hill, and most of which are located within 20 miles of downtown Franklin. Local parks make up a majority of the current youth sports supply but there are a few indoor and outdoor sports complexes located in Williamson County that can accommodate consistent usage, large groups or large events.

The following table summarizes the local and regional sports supply of facilities and participation levels.

Table 9

Local, State and Regional Sports Overview

Sport	Supply of Facilities			Participation Levels		
	Local	State	Regional	Local	State	Regional
Indoor						
Basketball	Low	Medium	Medium	High	High	High
Volleyball	Low	Medium	Medium	High	High	High
Wrestling	Medium	Medium	Medium	Medium	Medium	Medium
Hockey	Low	Medium	High	High	Medium	High
Outdoor						
Soccer	Low	Medium	High	High	High	High
Football	Low	Low	Medium	Medium	Medium	Medium
Baseball	Low	Medium	High	High	High	High
Softball	Low	Medium	High	High	High	High
Lacrosse*	Low	Low	Low	Medium	Medium	Medium
Rugby	Low	Low	Low	Medium	Medium	Medium

* sport prohibited at most facilities

Source: Hunden Strategic Partners

Basketball and volleyball have a low level of supply for indoor facilities locally, yet a medium supply level exists in the state and regionally. The participation level is high for those sports in the local, state and regional levels. As a result, residents and potential visitors are leaving the local area to utilize facilities. The closure of A-Game compounded the exodus by displacing more user groups and created unaccommodated demand that far exceeds the supply of facilities within the County.

Traditional sports such as soccer, baseball, softball, basketball and volleyball generally dominate facility usage and displacing the growing and non-traditional sports. However, sports such as wrestling, lacrosse, hockey and others are increasing in popularity and in participation levels locally and regionally. As a result, groups from these sports are placing more strain on existing fields by filling in less-than-preferred use times and absorbing any use times that become available. Fields and diamonds will not have time to recover and require more care and maintenance, while maintenance and upkeep will need to be a top priority in keeping indoor facilities from becoming battered and dated.

Participation levels are high for soccer, baseball, softball, basketball, volleyball and hockey. However, the outdoor sports participation levels are exceeding the current supply of fields. Although the indoor sports are exceeding the current supply of facilities, the future of the A-Game facility will influence potential indoor developments and their scale.

The following table shows the user group demand by use and the overall facility needs in Williamson County.

Table 10

Williamson County Sports Supply and Demand Matrix

Sport	User Group Demand: Local Users	Leagues	Tournaments	Facility Demand: Low	Medium	High
Indoor						
Basketball	High	High	High			✓
Volleyball	High	High	High			✓
Wrestling	Medium	Low	Medium	✓		
Hockey	High	High	Medium			✓
Outdoor						
Soccer	High	High	High			✓
Football	Medium	Low	Low	✓		
Baseball	High	High	High			✓
Softball	High	High	High			✓
Lacrosse*	Medium	Medium	Medium		✓	
Rugby	Medium	Medium	Medium		✓	

* sport prohibited at most facilities

Source: Hunden Strategic Partners

The facility demand for an indoor facility that can accommodate basketball, volleyball, wrestling, hockey and other sports is high due to the closure of the A-Game facility. The future of the A-Game facility will greatly impact the indoor facility needs and priorities for athletic facility developments. If A-Game were to reopen as it previously existed with six basketball or 12 volleyball courts and two sheets of ice, indoor facilities needs would be reduced and not as pressing. The Ag Expo Center has accommodated wrestling events and demand regularly, resulting in a low need for additional facilities.

Soccer has high demand across all use types and will drive the use for additional fields. Baseball and softball has pent up demand partly due to the restrictive use arrangements set by cities within Williamson County. A facility that can easily accommodate tournaments is expected to garner a lot of interest. Additionally, the growth in participation, which will be supplemented by population growth, is continually increasing the amount of use programmed at existing facilities. The increase use will cause greater wear on the fields, which can lead to greater maintenance costs.

The outdoor sports have facility demands that can only be accommodated with the addition of new outdoor facilities. Although A-Game is currently closed, it is an existing facility that has the potential to accommodate demand for basketball, volleyball, hockey and other indoor sports. A-Game would require investment to bring the facility back to functionality compared to developing a new facility. Soccer, baseball, basketball and volleyball all have large and established sports programs that have unaccommodated demand and high demand for tournaments in Williamson County. Although hockey has a high local demand, the tournament demand falls short in comparison to soccer, baseball, basketball and volleyball. Based on this, HSP found that outdoor sports demand from local users, league and tournament play is more pressing need in Williamson County.

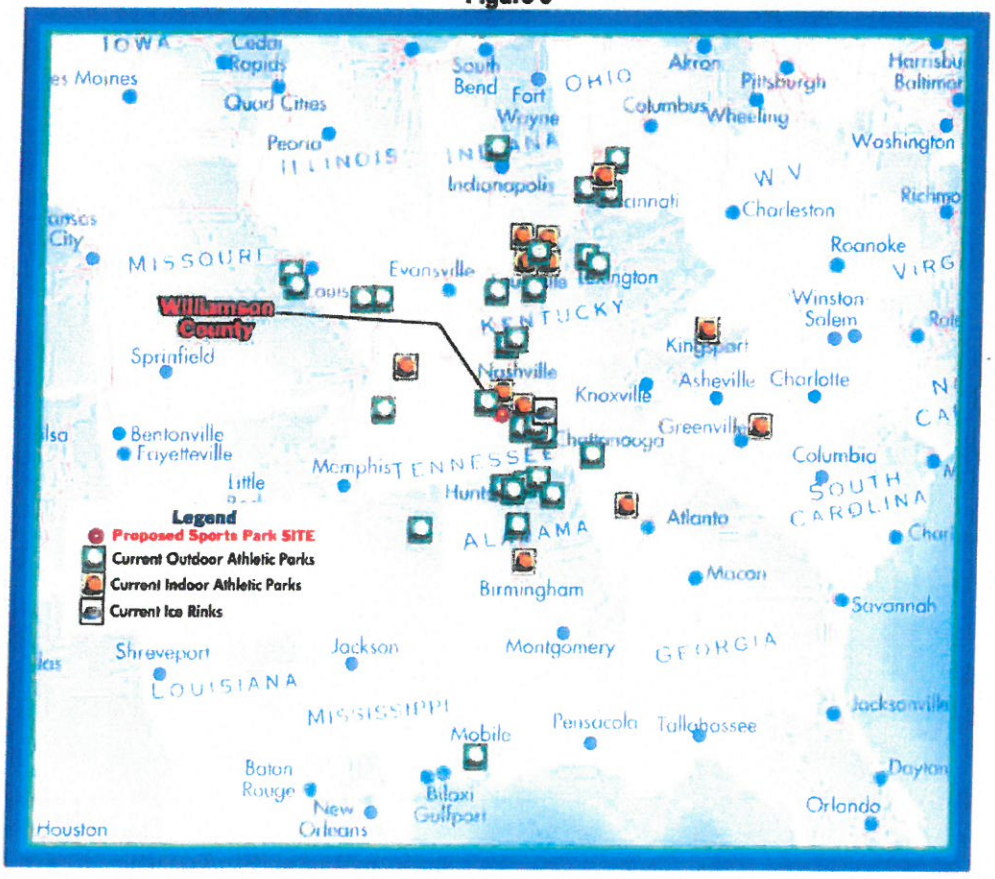
Unaccommodated demand for outdoor sports in the area, specifically baseball, softball, football and soccer exists. Youth programs are at capacity and organizations have expressed interest in programming more tournaments and creating more demand in the area. Collectively, all local, state and national programs stated that demand for fields in Williamson County is growing faster than what can be accommodated.

Regional and State Facility Analysis

HSP evaluated the state and regional supply of youth sports facilities to determine the level of competition in Tennessee and the surrounding region to better understand the necessary components that would position Williamson County competitively for statewide and regional tournaments and events. The various sports complexes located in Tennessee and throughout the surrounding region compete to host state tournaments while also appealing to the local and regional users as a destination for practices, leagues, neutral game sites and tournaments. These facilities, depending on their location, are likely to compete with a Williamson County facility on a state, regional and potentially local level.

The following figure shows the sports facilities in the region.

Figure 5



The region has a number of complexes with similar characteristics that are capable of hosting statewide and regional tournaments. Some are smaller local facilities that host few tournaments while others are larger sites that are able to attract teams from within a one-to-two-hour driving distance for a few annual tournaments. Others are large facilities that have established robust and exhaustive tournament schedules for local and regional traveling teams. In each case, local teams are offered usage based on calendar availability after tournaments are scheduled. Any association that can be made with an established group of travel teams known in the region will help crystalize relationships that could build premier tournaments, which is a necessity for success. These tournaments attract a significant number of non-local attendees and has a direct impact on the local hotel market through room nights generated. These facilities also organize local leagues and have local tenant groups to help supplement each facility's usage and financials.

A few of the larger regional facilities will compete with a new regional facility in Williamson County. Williamson County has the opportunity to establish itself as a destination for large regional, state and potentially national tournaments. The location of Williamson County regionally is ideal for tournament organizers, and is enhanced by its location just south of a major tourism destination, Nashville.

Sports Tournaments and Opportunity Analysis

Tournament Market Analysis

One major trend in youth sports is the rise of travel teams that participate in regional, statewide or multi-state tournaments. This trend has led to more youth being involved as a single-sport participant, especially as the participant ages and moves into higher skill levels above age 12 or 13. The result of this trend is that localities have begun to understand the economic benefits of hosting such tournaments. More localities are developing athletic complexes with the intention of not only providing the local community with athletic opportunities, but economic benefits such as hotel room nights and restaurant spending. The athletic complexes are built with the intention to encourage regional, multi-day tournaments that will bring participants and families to the area to stay overnight and contribute to the local economy.

Based on the analysis, a multisport athletic complex developed in Williamson County would likely host tournaments of state or regional size in the immediate future and could be established as an annual host site. With the high local demand and highly reputable clubs/teams, additional space is needed to accommodate the demand and support the local clubs/teams growth and tournaments. Various clubs/teams and state organizations have expressed interest in partnering and/or relocating their offices to a new development in Williamson County. Any development of an indoor and/or outdoor complex in Williamson County should consider a partnership with one or more clubs/teams or state organizations. A facility in Williamson County is expected to attract teams from Tennessee and regionally within a five-hour drive. In addition, a facility in Williamson County is expected to compete with the premier regional facilities for state, regional and potentially national tournaments and events for both indoor and outdoor sports. A facility that could accommodate larger tournaments could benefit other smaller venues by generating overflow use or a need for practice facilities during an event.

Case Studies

Five comparable facilities are profiled. All of the comparable facilities include both indoor and outdoor sports complexes. Of the five comparable facilities, three (National Sports Center, Maryland Soccerplex and Sports Village USA) are multi-sport complexes and one (Grand Park in Westfield, IN) is focused solely on tournament use. The National Sports Center emphasizes soccer and other field sports but also has a hockey facility, a velodrome, a golf course and other amenities.

The following table provides an overview of the comparable facilities.

Table 11

Comparable Facilities Summary

			Outdoor Facilities			Indoor Facilities			
Facility	Location	Year Opened	Multipurpose Fields	Diamonds	Championship Field	Basketball Courts	Indoor Turf Fields	Ice Rinks	Other
National Sports Center	Blaine, MN	1990	54	4	Yes	--	2	8	Golf Course, Velodrome, Dormitory
Westfield Grand Park	Westfield, IN	2014	31	26	--	8	3	--	Event Center
Maryland Soccerplex	Boyds, MD	2000	24	5	Yes	8	2	--	Tennis Courts, Aquatics Center, Meeting Center
Sports Village USA	Frisco, TX	2009	17	--	Yes	8	1	--	Urgent Care, Performance Training Facility
Rocky Top Sports World	Gatlinburg, TN	2014	7	--	Yes	6	--	--	--
Average	--	2005	27	12	--	8	2	8	--

Source: Various Facilities, Hunden Strategic Partners

The case studies present a range of youth sports complexes that all have similar characteristics to the vision of a potential sports complex in Williamson County. While subtle differences are found between each facility, each complex's business model is focused on scheduling large tournaments. These tournaments attract a significant number of non-local attendees and has a direct impact on the local hotel market through room nights generated. These facilities also maintain a local league to help supplement each facility's usage and financials.

Scheduling priorities are a feature in nearly all comparable facilities. An emphasis is placed on tournaments while local groups are offered usage based on calendar availability after tournaments are scheduled. Some facilities have demonstrated the ability to attract more than just soccer, baseball or softball events, further enhancing usage opportunities and financial performance.

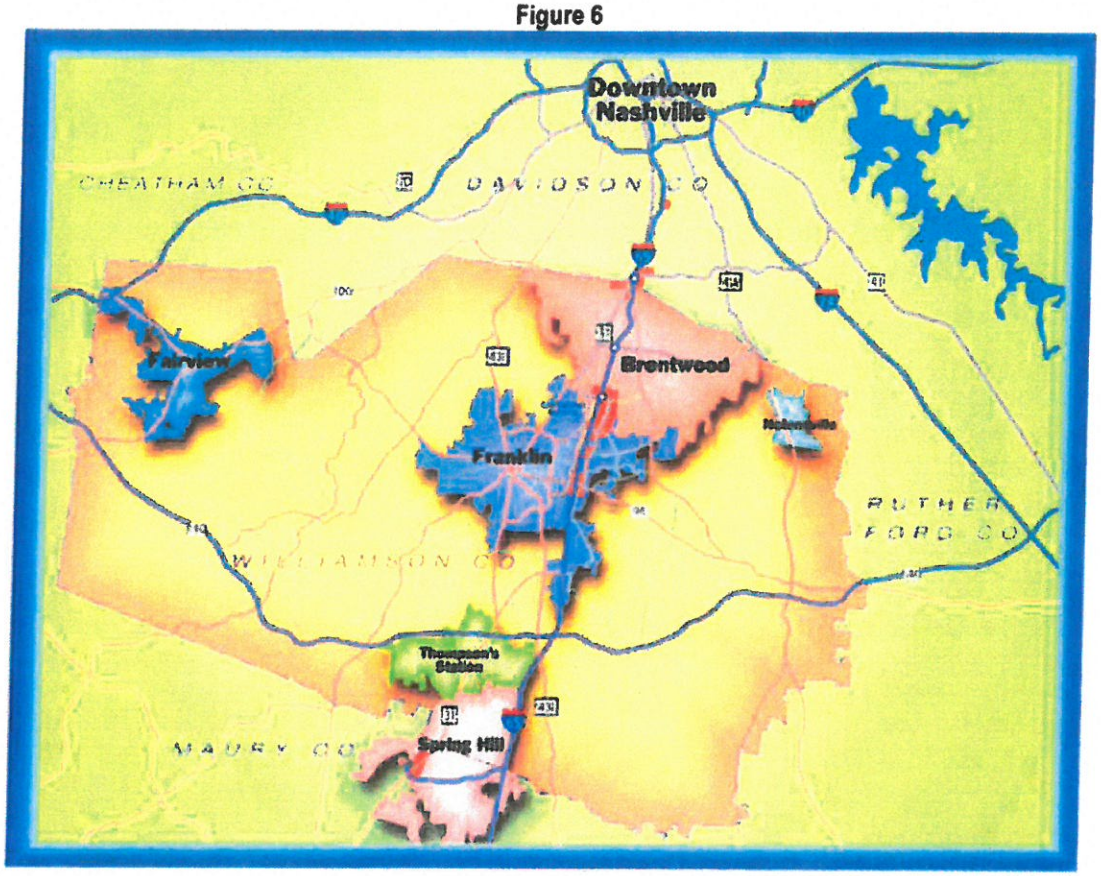
A new Williamson County sports facility's success will depend on how well the facility's schedulers and staff can meet the standards set by these comparable facilities. Not only do these complexes offer insight into a new potential sports complex's funding and governance, they will also serve as competitors for many tournaments and events.

Hotel Market and Restaurant Cluster Analysis

The Williamson County hotel market is characterized by a collection of small- and medium-sized limited-service and select-service establishments. Newer properties have been developed at a higher quality, while older properties are typically lower quality.

The following map shows the location of the primary hotel nodes in Franklin and Brentwood.

Figure 6



There are no hotels in Nolensville and Thompson's Station. The hotels in the County are primarily along I-65 in Brentwood, Franklin and US 31 in Spring Hill. However, there are two hotels in Fairview.

The following table summarizes the Williamson County hotels by chain scale, average size, average opening date and number of hotels by class.

Table 12

Lodging Summary: Williamson County

Chain Scale	Rooms	% of Total Rooms	Hotels	Rooms per Hotel	Avg. Opening Year	Avg. Age in Years
Luxury	--	--	0	--	--	--
Upper Upscale	--	--	0	--	--	--
Upscale	1,633	32%	12	136	Dec-01	14
Upper Midscale	2,007	40%	13	154	Nov-99	16
Midscale	893	18%	10	89	Nov-90	25
Economy / Independent	540	11%	7	77	May-93	23
Total / Average	**5,073**	**100%**	**42**	**121**	**Dec-97**	**18**

Source: Smith Travel Research, Hunden Strategic Partners

No luxury or upper upscale properties exist in Williamson County. The 12 upscale hotels in the County have a total of 1,633 rooms, which account for nearly 33 percent of the market. Approximately 40 percent of the rooms in Williamson County are upper midscale, with 2,007 rooms throughout 13 properties, making this the largest segment. The midscale class has 893 rooms across ten properties making up 18 percent of the market. The economy/independent is the smallest segment in inventory with 540 rooms across seven hotels. The two largest segments in the County are upper midscale and upscale, combining for nearly 75 percent of the Williamson County market with more than 3,600 rooms of the 5,073 rooms in the County.

The next table shows occupancy by day of week for each of the past twelve months. For example, all Saturdays in April are averaged and shown as April/Saturday. Days of the week with occupancy between 75 and 80 percent are shown in yellow, suggesting mild displacement and unaccommodated demand, while orange shows days with 80 to 90 percent occupancy, suggesting very likely displacement. Days in red are for times when occupancy was beyond 90 percent for the set, suggesting near-certain displacement.

Table 13

Occupancy Percent by Day of Week by Month - June 2015 - May 2016

	Sunday	Monday	Tuesday	Wednesday	Thursday	Friday	Saturday	Avg
Jun - 15	52.8%	78.7%	91.3%	85.9%	84.1%	90.9%	88.3%	82.2%
Jul - 15	45.3%	76.4%	88.8%	88.2%	68.2%	65.6%	72.8%	71.2%
Aug - 15	56.2%	70.3%	85.7%	85.6%	77.8%	87.9%	93.1%	79.9%
Sep - 15	57.0%	86.3%	92.6%	90.1%	80.9%	82.4%	84.6%	82.1%
Oct - 15	41.2%	69.3%	77.7%	81.7%	74.5%	75.8%	71.2%	69.2%
Nov - 15	44.9%	61.9%	67.2%	66.1%	61.7%	54.9%	62.6%	60.4%
Dec - 15	34.6%	65.0%	77.4%	76.1%	56.0%	57.8%	53.3%	58.9%
Jan - 16	41.1%	70.5%	85.0%	84.5%	68.6%	75.7%	74.5%	71.4%
Feb - 16	43.9%	81.9%	91.4%	89.5%	80.1%	93.8%	94.1%	81.2%
Mar - 16	52.8%	87.6%	96.0%	90.3%	79.9%	93.2%	92.4%	85.1%
Apr - 16	49.5%	76.6%	90.7%	92.2%	78.5%	88.7%	90.7%	80.1%
May - 16	59.1%	94.2%	89.5%	92.6%	85.9%	90.0%	87.7%	87.2%
Average	**47.8%**	**76.4%**	**86.8%**	**85.8%**	**75.1%**	**79.9%**	**79.4%**	

Sources: Smith Travel Research

Each cell is an average of four specific dates, for example Wednesdays in September *averaged* 90.1 percent occupancy. As shown, nearly all days, Monday through Saturday, February through June, have an occupancy greater than 80 percent, with approximately half greater than 90 percent. September also shows strong occupancy but not as high as the two peak months. As with most four season markets, the occupancy in this market decreases in the winter months, but it is unusual that July has an occupancy lower than the rest of the summer months. This will allow the market to host tournaments in the summer, especially in July. During the months of February through June the market shows high rates of occupancy and unaccommodated demand, which is when rooms are likely not available in preferred hotels and guests have to settle for their second or third choice of hotels.

The following table shows the ADR by day of the week for each of the past twelve months. The yellow cells represent ADR values from $130 to $140, the orange cells represent values from $140 to $150, and the red cells are all values above $150.

Table 14

ADR by Day of Week by Month - June 2015 - May 2016

	Sunday	Monday	Tuesday	Wednesday	Thursday	Friday	Saturday	Avg
Jun - 15	123.07	138.27	146.33	144.26	138.88	136.40	133.90	138.19
Jul - 15	119.11	137.42	144.57	141.68	128.25	116.71	117.53	130.48
Aug - 15	122.31	136.41	141.26	141.68	134.87	136.93	139.09	137.19
Sep - 15	127.09	145.58	153.29	151.95	141.49	142.61	144.93	144.70
Oct - 15	121.17	137.37	145.35	148.31	132.44	126.47	122.17	133.98
Nov - 15	111.15	126.57	134.11	132.10	126.92	108.73	108.25	122.94
Dec - 15	123.59	139.09	143.26	142.05	129.82	117.05	117.12	130.99
Jan - 16	121.33	139.40	147.41	146.88	132.12	123.04	123.26	134.82
Feb - 16	126.05	143.31	149.76	148.73	138.24	137.41	136.82	141.69
Mar - 16	131.08	140.98	157.39	154.77	140.90	143.11	141.25	146.10
Apr - 16	124.68	146.03	153.98	153.19	141.90	138.08	135.95	143.28
May - 16	133.71	151.32	160.14	156.75	146.10	143.49	140.16	148.60
Average	**124.07**	**141.52**	**148.51**	**147.15**	**136.93**	**133.03**	**131.72**	

Sources: Smith Travel Research

The highest average daily rates occurred on Tuesdays in May, at more than $160. The market has more than a $25 variance on a monthly basis, from an average of $122.94 in November to an average of $148.60 in May. As with nearly all markets, the day of the week with the lowest ADR is Sunday with an average of $124.07, with two months having an average less than $120. This continues to show the seasonality of this market, with higher ADR's from May through September and lower rates when occupancy falls the rest of the year.

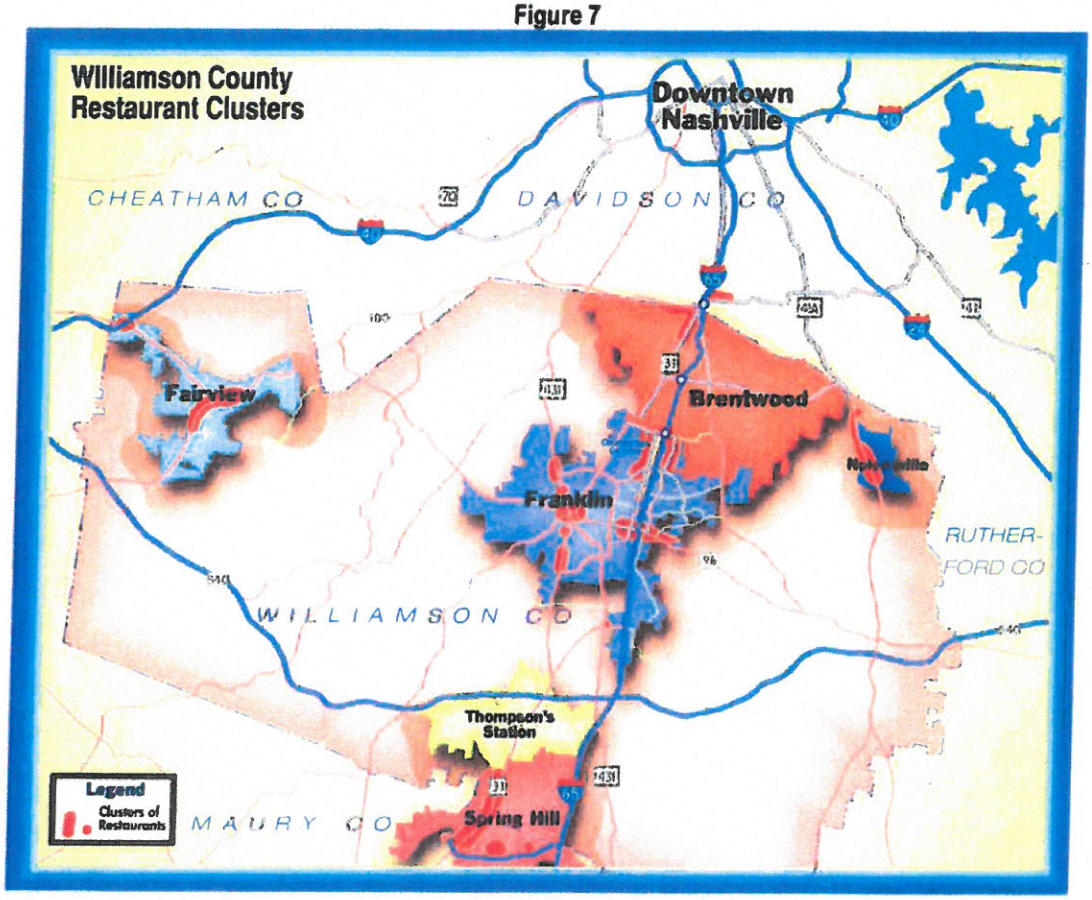
Restaurant Cluster Analysis

The hospitality package is critical to the attractiveness of a tournament-focused youth sports complex and can impact the likelihood of securing events. Tournament groups and organizers have specific hospitality needs and demands that must be met in order to attract a tournament to the area. In addition to the number of hotels and a specific ADR range, the number and distance of food and beverage options within the area is a critical

aspect to the success of facility. For example, the A-Game facility was considered a tournament-friendly facility due to the robust amenities within a 15-mile radius. HSP researched the number and location of restaurants in Williamson County. The majority of the restaurants are in four of the six nodes.

The following map shows the restaurant nodes in Williamson County.

Figure 7



Williamson County has approximately 500 restaurants. Franklin and Brentwood have 82 percent of the restaurants in the county, with 407 locations combined. There are only three restaurants in Thompson's Station so any facility built there would use the hospitality package in Franklin and Brentwood.

HSP found that the restaurant package in Franklin and Brentwood would support a new athletic development in Williamson County. Both cities offer restaurant options that have easy access to I-65, hotels and other entertainment options that would serve an athletic facility.

The hotel supply in Williamson County is mainly located along I-65 in Franklin and Brentwood. The location of a youth sports facility in Williamson County is important to the success of the facility. A facility developed

outside of Brentwood or Franklin will need to have easy access to the hospitality amenities along I-65. Event organizers and participants prefer to not have a lot of travel time from hotels to the sports venue. The nodes with hotels in Williamson County also have a majority of the restaurants, which also is important for visitors as they travel to the area. The hotel market in Williamson County is healthy and growing. The rates for hotel rooms currently are attractive to travelers and these rates are expected to be compressed down slightly as new and planned rooms are added to the hotel room inventory.

Discussion of Strengths, Weaknesses, Opportunities and Threats

HSP used a SWOT (Strengths, Weaknesses, Opportunities and Threats) analysis to evaluate the Williamson County proposed project as it relates to overall market feasibility as well as the ability to create impact for the County. The analysis draws from the facts surrounding the concept, Williamson County and the surrounding community, the facilities and activities that may be considered as competitors in the region and facilities throughout Tennessee and the United States that would be considered comparable examples to the proposed concept.

The application of that analysis is as follows:

Strengths (Existing attributes that are helpful to a project)

- **Local Population Base.** While the population of Williamson County is more than 211,000, Williamson County is centrally located in the country and within drivable distance for millions of people. In addition, Williamson County has been experiencing tremendous growth over the past 16 years. Given that the current population has demonstrated a high demand for recreation services, continued population growth is expected to increase this demand and in turn increase the viability of new sports and recreation facilities.
- **Climate for Optimal Playing Conditions**. Williamson County is in the northern periphery of the humid subtropical climate zone, with hot, humid summers, and cool winters with occasional mild periods. Williamson County has four distinct seasons that include cool plateau breezes, moderate nights in the summer, and no prolonged periods of heat, cold, rain, wind, or snow. This makes for ideal playing conditions and allows for events to occur earlier in the spring and later into the fall. However, the weather can be unpredictable and pose some challenges.
- **Tourism Reputation**. The area, highlighted by Franklin and Brentwood, is known for its Civil War history and is just south of a popular tourism destination, Nashville, TN. The region is becoming iconic and one of the most popular tourism destinations. This makes planning a trip to the area much less of a hurdle for many than an otherwise unknown destination.
- **Access**. Williamson County includes two major interstates, I-840 and I-65, and is within easy access from all directions. The Nashville International Airport is nearly 26 miles from the Williamson County CVB in downtown Franklin.
- **Access to Recreation and Entertainment**. In addition to the recreation and entertainment options in Brentwood and Franklin, Williamson County is within a short drive to the downtown Nashville historic, arts and culture, and entertainment attractions.

- **Access to Retail, Restaurants and Hotels**. Although the majority of quality hotel, restaurant and retail options are primarily located in Franklin and Brentwood, the growth of the County as a popular family-destination has led and will continue to lead to more hotel, retail and restaurant developments within the County. Until a new sports and entertainment development occurs, Franklin and Brentwood offer a mix of quality and options to suit visitor preferences.
- **Viable and Stable Local Partners.** The local sports organizations that Williamson County can partner with are popular and successful groups that have provided sports and recreation services to the community for many years. There are established teams, clubs and leagues that have grown through the years, with some being the largest and most important youth sports organizations in the community and state. In addition, the Williamson County School System is expanding each year to accommodate the increase in the number of students. A new athletic facility could be a solution for the school system to accommodate athletic programs that do not have room for practice.
- **Profitable and Successful Regional Partners/Tenants.** Organizations such as TSC, Babe Ruth/Cal Ripken, Showtime Baseball, AAU, SRVA, NSA and ASA have a history of many years of success in their respective sports. These organizations are some of the largest youth athletic organizations in the United States and run or sponsor many local, regional and statewide tournaments. These local and national organizations are regularly searching for high-quality venues as well as venues with large enough capacities to host their events at a single location.

Weaknesses (Existing attributes that may hurt the success of a project)

- **City and County Restrictions of Athletic Facilities.** Presently the Williamson County Parks Department and Parks Departments in Franklin and Brentwood restrict the use of their facilities by outside groups and/or hesitate to program weekend tournaments that may limit resident use of the parks or facilities. A strong relationship between the County and the Parks Departments will help with access to additional facilities for larger tournaments.
- **Site build out incomplete.** The growth of Brentwood and Franklin as well as the high land prices, has limited the available sites for a development of an athletic facility. The rural areas with available space for development do not have the retail, restaurants and hotel package that, when built, will provide a better visitor experience.
- **Tight Weekend Hotel Market.** As youth sports participants travel often and on weekends, having inexpensive hotel options is critical. While most markets are strong during the week and weak on weekends, the destination appeal of Nashville for leisure travelers could pose hotel challenges for weekends. Higher rates and occupancies, especially in the spring, could be a challenge for the sports complex.

Opportunities (External conditions that will help the feasibility of a project)

- **Development of Tournaments and Leagues.** Developing partnerships with local teams or leagues, state organizations and national organizations such as TSSA, TSC, TSSAA, NSA and ASA will increase the ability to develop, manage and conduct several regional tournaments per year that will bring participants and spectators from around the region and the United States.

- **Quality Existing Demand.** A new sports complex in Williamson County has the opportunity to be one of the highest-quality facilities in the country, with championship-caliber fields, diamonds and courts, as well as concession stands, bathrooms and other facilities.
- **Economic Development of Surrounding Areas.** Because of the potential for regional and national tournaments, as well as the visitors and participants from leagues and other events, a new sports complex has the opportunity to become a catalytic development for the area surrounding the complex and the County.
- **Trends for Travel Teams and Elite Tournaments.** One major trend in youth sports is the growth of travel teams and the tournaments and other competitions that teams require. Other travel team sports also create opportunities for tournaments, including rugby, lacrosse and softball. As these trends continue, opportunities for more tournaments will occur at an athletic facility in Williamson County.

Threats (External conditions that are a threat to the feasibility of a project)

- **City and County Priorities.** As with any City or County that is experiencing tremendous growth, development priorities are assessed and analyzed. Williamson County has dedicated more than half of its general fund to the building and maintenance of schools over the past 20 years. The County is currently building one high school per year to accommodate the growing number of students. The investments into County schools could impact any potential athletic development.
- **Scheduling Conflicts.** The intentions of the facility are to provide an environment for the community to participate in an active lifestyle. The facility will also want to host larger scale state and regional tournaments that will create economic opportunities and growth. The schedule of the facilities could become difficult due to these two conflicting goals. In the case of a tenant team or club, these groups will ultimately impact and limit the flexibility of the proposed facility's schedules. This may limit access to a segment of the local population, especially competing organizations.
- **Competitive Developments** – The sports complex concept has become very popular in economic development circles and many communities are considering developing similar projects in order to generated economic impact. While land in communities can be limited relative to the acreage needed for a multi-sport complex, a number of communities are considering sports developments, and building them.
- **Cost.** The cost of the project could be higher than existing resources to fund it, and that could threaten the possibility of development. As such, various development options and scenarios are suggested.

Recommendations

The details of each recommendation are presented below.

Multipurpose Fields (Soccer, Football, Lacrosse, etc.)

- 24 fields including one championship field with seating to create a stadium atmosphere. This offers sufficient fields for competition and practice during events. Tournament organizers typically schedule age/gender competitions using a pod format. Generally, the pod format is four-field units.
- Fields should be lighted, which provides scheduling flexibility and extends the timeframe for daily use. Some organizations such as USYSA seek facilities with lights. It is suggested that installation should be in four-field units if programming limits the number of lighted fields.
- The field mix is suggested to be eight artificial turf fields and 16 natural turf fields.

Baseball/Softball Facilities

- A standard rule of thumb for softball tournaments is one field for every ten youth teams and one field for every fifteen adult teams. Regional tournaments can range from 20 teams up to 60 teams. National tournaments have consisted up to 172 teams. It is suggested that the proposed project include 12 diamonds.
- Turf Type. It is recommended the baseball/softball fields be constructed with artificial infields and natural grass outfields. This allows for both softball and baseball use at all age and competition levels. Artificial turf provides maximum programming flexibility and offsets the impact of inclement weather.
- Field size. It is recommended to have fields with a minimum 300-foot fence. This meets the minimum needs for adult competitions while still acceptable for youth (which operate with a 200-foot fence distance). Portable fences can be installed for youth competitions if a shorter fence distance is desired. Additionally, the infield should also be designed so that the base paths can be adjusted to shorter distances for youth competition.
- All fields should be lighted, which provides scheduling flexibility and extends the timeframe for daily use. This is an important feature for both youth and adult league and recreational play, which are largely scheduled during evening hours to accommodate community residents.

Basketball Facilities

- Ten basketball courts including one court that can accommodate a 94'-long NCAA-sized court in order to hold NCAA sanctioned games. The 84' x 50' courts will be large enough for all high school and younger play. This will maximize the potential usage within the building for local and tournament play and generate more revenue to offset operating expenses.

Volleyball Facilities

- 20 volleyball courts with appropriate perimeter space to provide safe playing conditions. Two volleyball courts can be programmed per each basketball court. This will also maximize usage and spread costs over a larger revenue base.

Indoor Multipurpose Facilities

- Two multipurpose indoor fields 49x82 yards each. This offers a field for both league and tournament play as well as recreational use. This also offers the ability for two programs to train or practice at the same time.
- Turf Type. It is recommended the indoor multipurpose fields be constructed with synthetic turf. This allows for both league and tournament use at all age and competition levels. Artificial turf provides maximum programming flexibility, including outdoor sport programs.

Hockey Facilities

- Two sheets of ice running off of one system. This will help to reduce the expense costs accumulated from operating sheets of ice. This will also maximize the potential usage within the building for local and tournament play and generate more revenue to offset operating expenses.

Other Recommendations

- Offer sufficient space for vendors/concessionaires to operate during events.
- A common challenge expressed among tournament organizers is that facilities do not have enough parking. Ample parking should be provided for the facility whether it is accommodating sports tournaments and league play, meetings, conventions, consumer shows or concerts.
- Concessions. An efficient concessions operation should be considered for both indoor and outdoor facilities. Given that events can often be full day or several days, the concession options should go beyond the basics and provide more robust options, especially if nearby walkable restaurants are limited. Concessions can be a significant revenue source for venues if events and food and beverage policies are properly implemented. Venues and events are restricting outside food and beverages in an effort to maximize onsite spending during events.

  Beyond the concessions that should be a part of the announcer/scorekeeper's booth for the ballfield facilities, an additional set of concessions should be developed for the multipurpose fields. Because of the size of soccer fields, additional concession/amenity building should be considered for these fields. An indoor facility is recommended to have a concession or food and beverage outlet that can accommodate large groups as well as simultaneous events.
- Changing/Locker Rooms. Changing/locker rooms should be provided, two for each sport, and these could be designed into the concession and restroom buildings for the outdoor facilities. Changing/locker rooms should also be provided for the court, indoor turf and ice facilities.
- Restrooms. These should be provided, at least one for each sport and designed in concert with locker rooms and concessions.

- Seating. Seating expectations for youth sports as well as non-sporting events are based on feedback from user groups and event organizers. There are no seating expectations for tournaments for youth sports such as volleyball and basketball. The two typical seating arrangements are folding chairs around the court (approx. 90 seats) or the use of three to five row portable bleachers. Sporting events such as wrestling, cheer, dance and gymnastics prefer and, in some cases, require spectator seating that can accommodate as many as 2,500 people. Seating requirements for outdoor multipurpose fields are limited. Seating and/or grass berm seating is recommended for a championship field. Ball fields are expected to have modest seating on each baseline for spectators.
- Areas for event organizers and staff. Event organizers need locations for event headquarters to conduct their business and meetings. Also, tournament officials and referees regularly do not have a base location to change or operate from. Two small meeting or multipurpose rooms, with bathrooms, should be provided for each sport. Facilities tend to program multipurpose rooms in the most centralized concession/restroom building to create a central headquarters for the facility and events.
- Result/Scoreboards. Provide space for scorekeepers and a visible scoreboard for fields, one per field, court or rink.
- Internet. Event organizers lose capacity and effectiveness when they do not have access to sufficient Internet. The facility should host a specific Internet connection (preferably wireless) at the Sports Complex.
- It is recommended that governing bodies be consulted for their facility assistance resources in the design and layout process. Governing bodies such as USYSA offer free services to optimize the highest and best use for each particular sports facility design and layout, in accordance with their facility specifications. Additionally, many offer opportunities for grants that can be used to help offset design and potentially construction costs.

Phased Construction Implications

The construction of sports complexes across the country is on the rise. However, municipalities are developing sports complexes differently; either all at once or through phasing different portions over time. There are numerous factors such as overall project cost, financing, land control, single sport vs. multi-sport facility, demand growth and others that impact the decision-making process on whether to phase the construction of a sports facility.

In phased construction, projects are purposefully planned for and delay building select components of the project. In the long run, the overall cost to build a phased project is higher, but the startup costs are substantially lower. This allows a smaller initial project to be constructed, and a strategic master plan provides the structure for future additions as finances allow. A smaller initial project footprint also leaves room to adjust the project along the way.

The following discussion provides an overview of the advantages and disadvantages to phasing the proposed project.

Advantages:

- **A lower initial investment**. Spreading the cost of construction over a longer period of time can allow larger undertakings to be done in affordable pieces. Sometimes it's the only way a project is attainable.
- **Shorter construction time**. A smaller scope of work results in an abbreviated construction schedule.
- **Experience**. Using the sports complex partially completed can start generating revenue and allow access to the community during a long-term construction timeframe. It also helps to inform future decisions, and it gives a real-world sense of the scale of the sports complex.
- **Allows for design changes**. Operating an existing portion of the sports complex may reinforce or alter previous design selections. Decision makers may decide the facility does not actually need the work planned for future phases or that certain facilities planned for in future phases might actually work better somewhere else or are not needed.

Disadvantages:

- **Complexity**. For all parties involved, a phased project is inherently more complex. There are more drawings and site logistics; there is more coordination.
- **Longer time to fully realize the project**. Phasing purposefully delays construction. An incomplete facility is acceptable to some groups, but for others, they may find other facilities to use. There is potential for loss of planned tenants and user groups. Additionally, the facility's demand and operating performance will take longer to reach stabilization as new facilities open over a longer period.
- **Higher overall costs**. Few things get less expensive with time. Delaying the purchase of materials, labor, design and engineering means the project will cost more. Financing and permitting costs must be factored in too.
- **Playing in a construction zone**. Many phased projects leverage the fact that they can use part of the venue during construction. But working around finished spaces makes for inefficient workflows for all of the building trades. Dust, debris, construction traffic, work schedules and noise are just a few of the hazards that make for stressful times and must be managed. Contractors and user groups alike find these situations disagreeable for different reasons, and most residents are likely to underestimate the general messiness of construction.
- **Allows for design changes**. Both a positive and a negative, yes. Because the work is completed over time, it can be tempting to change the design at every turn.
- **Initial funding could be reallocated for other uses**. Other projects or budgetary needs could be considered higher priorities and receive funds that were intended for the sports complex.
- **Alterations to complex interwoven, phased projects can be costly for obvious reasons**. Minor changes are completely sensible, but rethinking major aspects of the project when it's under way is disruptive to all parties involved, and there is typically premium for the privilege. Completing the design all at once preserves design momentum and ensures that the project will

be executed with a consistent vision. It also prevents leaving out or forgetting critical pieces of infrastructure along the way.

If a phased approach is chosen, a phasing plan should be developed that describes in both general and detailed terms what will be constructed and in what sequence. Documenting the vision at the outset also allows all parties to plan for an efficient construction process. The phasing plan must be developed to carefully consider the interdependence between systems and aesthetics.

The recommended sports complexes would be one of the largest outdoor and/or indoor recreational and tournament sports facilities in the state and region once all phases are completed for either an indoor or outdoor project. Although Phase I facilities will provide a sizeable sports facility in Williamson County, the facilities are expected to accommodate leagues, practices and games for local participants during non-peak times. A facility will have enough fields, diamonds or courts to accommodate small to moderately sized tournaments. The vast majority of tournaments will attract local, statewide as well as out-of-state teams. Depending on the future of A-Game, a new indoor facility will either replace what A-Game previously offered and accommodate moderately sized to large tournaments or will be a smaller venue to complement a restored A-Game facility to attract larger tournaments. Regardless of the A-Game situation, a new indoor facility will provide enough turf fields to accommodate local demand, rental demand and small to mid-sized tournaments.

Sports Management & Operations Strategies Overview

Sport tourism represents one of the fastest growing sectors in tourism. Many destinations and host locations can boast of having the appropriate infrastructure from sports facilities, diversity of sports activities through to the hotel package to capitalize on this growing industry. However, it will be the destinations that foster the inner sport tourism entrepreneur that will win by building programs of events and activities that will deliver sustainable economic, social and promotional benefits.

Innovative communities' ability to maximize the potential of their sports, heritage, natural and sporting resources has enabled them to build and attract events that has positioned them as the trendsetters of the sector. The many layers of sport tourism from hosting major events to the growth of active leisure and recreation reveals the opportunity that exists for all communities. Sport tourists are so varied from the weekend warriors seeking self-actualization in triathlon, cycling or running to competitive athletes who travel from destination to destination looking for the next elite competition.

As Williamson County looks to the future, the community must continually adapt to become a premier destination. When it comes to driving tourism, filling hotel rooms and generating economic impact for Williamson County, the landscape of tourism, hospitality and destination appeal is competitive, and the more that can be done to connect with visitors, the better. Now that the consumer desire or demand side is growing, Williamson County needs to be strategic and encourage sport tourism innovation.

Sports Marketing Strategy

The review of facilities and the conversations with the key stakeholders in Williamson County exposed some facility and seasonality weaknesses but also provided some strong opportunities to strengthen Williamson

County as a great place to "live and play" as well as to "visit and play". The challenge in putting together recommendations on impactful marketing and business development tactics rests in one word that becomes a thread in objectives….."*Clarity*".

For Williamson County this will mean:

- Clarity in Vision
- Clarity in Goals & Objectives
- Clarity in Responsibilities
- Clarity in Evaluation Metrics

Any marketing strategy will need to be guided by the four areas above.

Marketing Strategy Components

The term "marketing strategy' has many meanings. For purposes of this report, HSP refers to a few components of sales and marketing that, when combined, help establish a strategy to move the County to the next level in the sports tourism space.

Normal destination marketing organizations (DMO's) use the term "sales" to refer to the type of activity used to attract meetings and conventions to their markets. For sports, the term "business development" is used since it better describes the true role of the team focused on attracting the event to their community. It requires an understanding of the specific sports, its actual operational needs, developing business models and managing specific overall event budgets.

Overall Sports Tourism Insights

The growth in sports tourism through the years has been driven by sports specialization through private and non-profit sports organizations whose most profitable income stream is event related income. What has become critical to the most successful organizations is finding communities who can provide better than average facilities, a community that provides destination amenities and delivers on their needs. In one simple word – "Trust".

The trust is built based upon personal relationships and having complimentary objectives and past event hosting success. While Williamson County has had a strong record over the years with key clients, diversity and stability of events will drive its future. Williamson County must continue to nurture those current relationships while building new ones. A common challenge for communities and CVBs is the turnover of sports marketing staff. Like any corporation, when staff turnover occurs, intellectual capital goes with them. In this case, the personal relationships of the staff and the trust that was built is important to maintain and grow. Relationships and trust in understanding the event rights holder's needs cannot be underestimated. Although hosting sports events are not extremely difficult, the rights holder wants to focus on growing their business and is looking for an understanding partner in the community. Continuity in understanding eliminates one more variable for the rights holder.

As competition in quality venues continues to increase, differentiation needs to be emphasized in the marketing and business development approach. Successful facilities have minimized staff turnover and facility management teams are very knowledgeable, stable in turnover, and committed to the athlete experience. Building upon those strengths would be an area to focus upon.

Facility Operations Strategy

Based upon the variety of sites that have been reviewed, a critical area for discussion should be focused on the overall integrated operational strategy for event and facility management as it relates to facility programming. As stated earlier in the review, a close working relationship must exist between business development (tourism driven) efforts and facility operations. A mutual understanding and respect of each stakeholder's goals, objectives and priorities should be reviewed and discussed. This community leadership commitment to the integrated strategy will allow for staffs of all stakeholders to understand the community's purpose in improving and/or building new sports and recreational facilities.

There are a variety of operational models that exist across the country in addressing this increased demand on recreational facilities usage for purposes of economic development (tourism). The issues on facility usage center around the incremental wear and tear on facilities, incremental facility costs, conflicts on prime dates and times, political influence and pricing.

Sports Management & Operations Strategies Implications

In order to strengthen Williamson County sports tourism and develop the reputation of the community as both a premier leisure and sports tourism destination, a comprehensive and long-term marketing and public relations strategy needs to be devised and implemented by a combination of stakeholders, which may include leaders from the County, Convention and Visitors Bureau, Parks and Recreation and other large sports organizations within the County. Williamson County has the opportunity to be known as a destination of important sports events, enhance the appeal of the area and drive economic impact to the county, region and state.