



Final Report
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**Project Title: The Economic Potential of Regional Sports Activities
in the Kanawha Valley**

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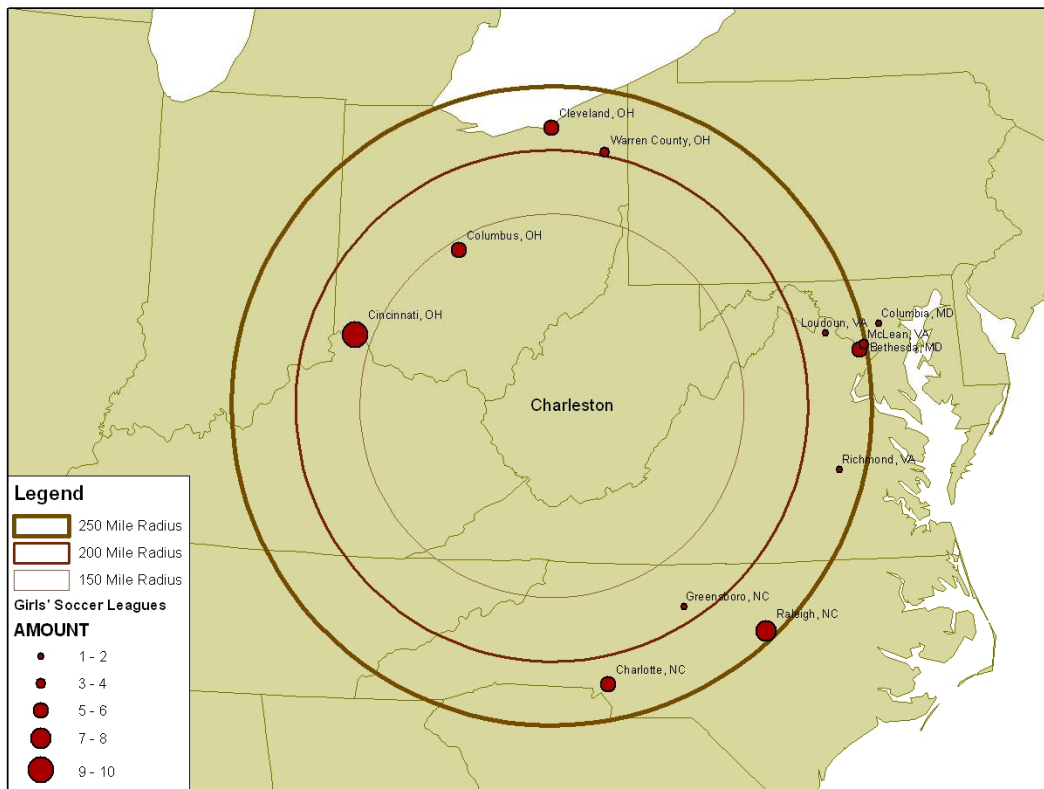
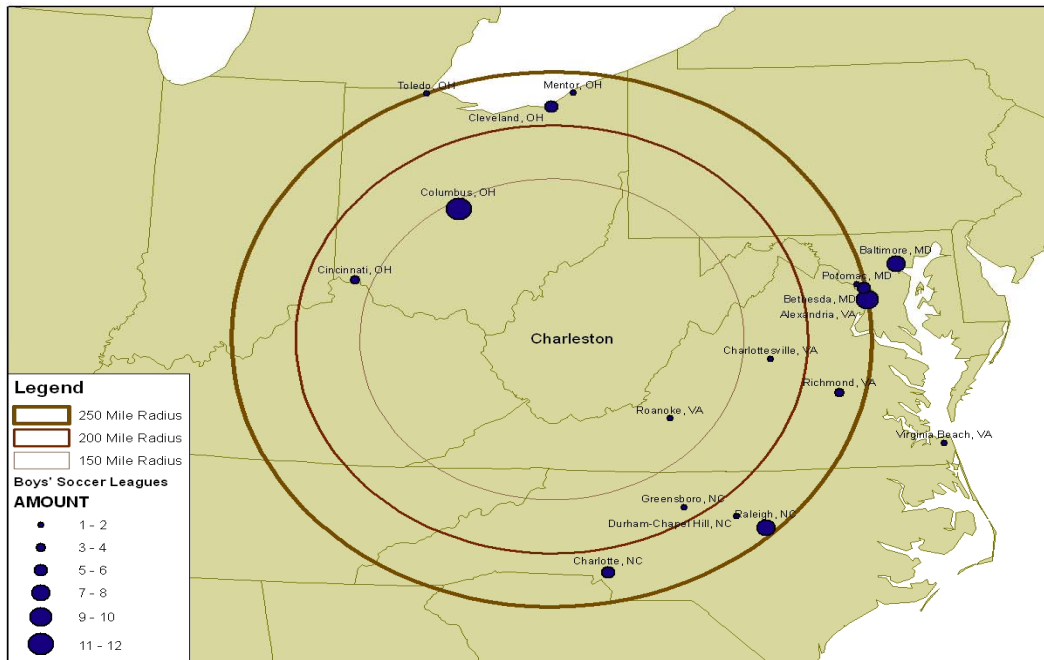
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I. Overview of the Economic Impact Study

Charleston, WV has an excellent opportunity to capitalize on the growing interest in local and regional sporting events. Investments to expand the sports related venues for the greater Kanawha Valley as well as the state of West Virginia and surrounding states will have a two-fold benefit. Local residents will have access to first-rate venues for competition and exercise. Secondly, these venues can accommodate regional events that will attract visitors to Charleston bringing high caliber teams and their wallets. Well designed sports facilities along with strong marketing will benefit local athletes, businesses, and communities. This study provides the Charleston Convention and Visitors Bureau (CVB) with an objective analysis and strategic advice in order to pursue alternatives related to expanding sporting events with a particular emphasis on youth participation.

The Kanawha Valley's has the potential to attract visitors to youth sporting events. Currently the area's sporting venues are fairly modest in comparison to other mid-sized cities in the region. However there are several attributes of Charleston that make it an excellent prospect for developing athletic facilities that promote local participation and attract out-of-town teams for regional competitions. This report establishes a strategic plan to expand those opportunities. The analysis focuses on the economic impact primarily of youth soccer but the model is generally extendable to other events such as softball, basketball tournaments, sports camps and swim and track meets. The estimated economic impact of bringing out-of-town athletes, coaches, and fans to these events serves as a barometer for the feasibility of public and private financial support to create venues for expanded sporting events. Potential tournament scenarios are considered based on feasibility and profitability. The study benchmarks Charleston's strategies and investments relative to what other leading cities such as Greensboro, NC and Rock Hill, SC are implementing.

What comparative advantage does Charleston have relative to other larger cities in other states? Unfortunately we do not currently possess a large contingent of the best athletes or field the top teams. However WV is strategically located between several of the national soccer hotspots. The maps on the following two pages illustrate that a large number of the top 50 nationally ranked boys teams (U9 to U19) are within approximately a half day drive of Charleston (250 miles or less). The second graph is a similar showing that over 50 of the top national girls teams are within a reasonable drive of Charleston. The top leagues in Columbus and Cincinnati, OH, central NC, central VA, and the greater DC area all have several nationally ranked teams. Charleston is likely to attract several of these top teams (along with a large contingent of very good teams) from these regions. This will be possible only with first-rate facilities and excellent promotion of the events.



Conversations and surveys with those involved with youth sports along with observing what other cities who have successfully promoted regional sporting events

resulted in some general findings. Five general seeds of success are necessary for virtually any sports related activity to have an ability to be financially successful and repeatedly attract quality competition to the area:

1. The facilities generally must represent something a notch better than what is currently available in most cities. They do not need to be world-class (“Disney”) level but should have all games held at a common site with professional layouts and supporting facilities.
2. The event(s) must be promoted and administered by a full-time, year-round staff. Volunteers and drawing upon the resources of local associations (e.g. Parks & Recreation, CVB, etc.) are vitally important but serve as support to a dedicated set of employees.
3. Any new sports sites must have a wide-appeal to general public-use and multi-season local recreation and sports leagues.
4. New developments should have flexibility in terms of the sports that can readily accommodate. The sites also should be robust as demand and opportunities change over time dictating the site be switched to other venues.
5. A sports tournament in Charleston, WV may not in of itself be a strong draw. The tournament could be marketed with other unique events in WV such as outdoor sports (e.g. whitewater rafting) to enhance their appeal. This also serves to make the tournaments robust to competing expansions of sports tournaments in other states. Competition amongst tournaments to attract high profile, top teams is very keen. Serious consideration should be given to catering to adults &/or disabled/disadvantaged children rather than strictly focusing on highly competitive youth events.

The primary findings of this study were based on the case of developing a 12-field soccer complex with an initial capital cost of \$1.2 million. The total annual expenses to support the site and tournaments are estimated to be \$379,000. The complex could support two major regional tournaments annually as well as host local leagues and events. It is predicted it would take four years to build the popularity of the tournaments and reach full capacity with 140 total teams per tournament. The tournaments would generate new local spending of \$3.21 million of which \$963,900 would be local earnings. Over a 10-year period the net present value (NPV) of the soccer complex would be \$5.5 million which translates into a return-on-investment (ROI) of 41%. Based on the positive experience with soccer tournaments, other facilities supporting softball, tennis, or other sports could be developed with similar positive athletic and economic impacts.

II. Findings of the Soccer Participant Survey

A survey of coaches and parents likely to be involved with travel tournaments was conducted on-line and in person at the Huntington Friendly on October 21-22, 2006. The purpose of the survey was to gather general insights about what WV and neighboring state's teams were currently involved with, their spending patterns on trips, and what attributes of a tournament were most important. The survey was completed by twenty individuals most who in some capacity are coaching soccer. The advantage of this group's insight is that they were able to characterize the choices and priorities of their teams rather than just their individual experience. It is important to note that the sample size is too small to perform statistical inference. However the respondents' answers in tandem with the findings from a broad selection of other studies should be sufficient to get reliable spending levels for the economic impact analysis.

Sports Involvement: The typical respondent was a coach and/or a parent of a travel soccer player. The related youth players tended to fall in the age range of 9 to 15 years-old; that is, players under the age of nine are likely to be involved with recreational soccer but not travel soccer due to a variety of factors (e.g. working on basic skills in recreational leagues). Youth 16 and over may be involved with school sports and other activities limiting their opportunity to travel. About three-quarters of those surveyed traveled extensively for tournaments attending from four to twelve a year. The few others attended only a couple tournaments within an hours driving time. Table 1 lists all the tournaments mentioned in the survey. It also adds several elite tournaments in the region that will need to be scheduled around in planning tournaments in Charleston.

Table 1: Popular Regional Soccer Tournaments (2006-7)

Tournament	Date	Location
WV Friendlies	April 22-23, May 6-7	Huntington, WV
WVSA Open Cup	June 4-6	Barboursville, WV
WVSA Region I	Jun 29-30	Virginia Beach, VA
Ohio FC Friendly Matches	Aug. 11-12	Columbus, OH
WV HS Soccer (start-of-season)	Aug. 18	WV
McCrary Jones Kickoff	Aug. 26-27	Parkersburg, WV
CUSA Mead Cup	Sept. 2-4	Dayton, OH
American Soccer Cup	Sept. 9-10	Cincinnati, OH
United Cup	Sept. 15-17	Louisville, KY
Fall Spectacular	Sept. 23-24	Beckley, WV
Bristol Open	Sept. 23-24	Bristol, TN
Fall Ball Classic	Oct. 7-8	Cincinnati, OH
WAGS Tournament (W)	Oct. 7-8	Hagerstown, MD
Lexington Invitational (LIT)	Oct. 14-15	Lexington, KY
HiFive Cincy Challenge	Oct. 14-15	Cincinnati, OH
WV HS Sectionals	Oct. 16-21	WV
King of the Hill Street Soccer Tournament	Oct. 21-22	Huntington, WV

WV HS Regional (Semi) Final	Oct. 24,26	WV
WV HS State Final	Nov. 3-4	WV
CASL Shootout	Nov. 18-19	Raleigh, NC
Metro FC Final Four Showcase	Dec. 1-3	St. Louis, MO
Adidas Blue Chip Showcase	April 20-22(W), April 27-29(M)	Cincinnati, OH
WVSA State Championships	May 19-20	Beckley, WV
Adidas Potomac Memorial Tournament	May 26-28	Baltimore, MD
WV ODP Region 1 Tournament	June 8-10	New Jersey
US Youth Soccer (East Regional)	June 28 – July 3	Portland, ME
US Youth Soccer National Championship	July 25-29	Frisco, TX

Tournament/Locale Preferences: The respondents had a bimodal response to the question of how far they would be willing to travel. Some may have interpreted the question as *ideally* how far would you travel for a tournament. About two-thirds of the respondents expressed a shorter trip of 1 to 3 hours with a few willing to travel a full-day. The additional bonus of the event being a championship tournament or having special attractions (e.g. Washington, DC or a beach) served as sufficient motivation for most of the respondents to take a longer trip. A two-day tournament was the modal response for ideal tournament length. The month preference (multiple selections were allowed) ranged throughout the late spring into October with no obvious best month. Several respondents liked the idea of a multi-day sports camp. This may be an opportunity to offer a unique experience for travel teams. Not surprisingly the most popular amenity was a hotel pool. Most respondents seemed to want to focus on soccer rather than explore other options.

Spending: Mid-priced hotels (less than \$80) were the modal choice although this may not be an economic reality. The meal choices were very similar across responders with breakfast at the hotel, lunch at concessions or fast-food and dinner at a mid-level restaurant. Travel was by car reflecting the general closeness of most of the popular tournaments. The companion numbers were lower than expected with some suggesting only one guest per player would join them on these trips. Spending on souvenirs was modest (<\$20) as well spending at retail outlets with the exception of a couple respondents who estimated \$100+ spending by parents at stores.

The Future: In this section we asked open ended questions about how best to design travel tournaments. In their own words here is a representative sample of their replies.

In response to “Has the travel team concept growing in popularity within your community” a few representative answers were:

- Yes & No. In the older age group the travel concept is still popular. I think parents have invested in this form of competition because it has yielded great rewards for the players - greater competition means better training means improved performance. The younger kids' parents would still rather see their child be a star in rec soccer rather than see them improve their skills at the risk of losing a game.
- No. Unfortunately, we are not a heavy travel soccer area. Recreational league is large, but most efforts in the community are towards baseball, football, etc
- Yes, more competitive, skill-building than YMCA, coaches

In response to “Are there aspects of traveling that could be improved that would greatly increase participation?” a few of the answers were:

- Multi fields in one location
- Sponsorship of teams to go to a nice tournament.
- Closer tourneys
- 2 games on Saturday - not at 8am; earlier games on Sunday so you can get back home at a decent time closer tourneys with quality competition nutritious food at concession stands so you don't have to pack for lunches and in-between games playable fields

In response to “What other suggestions do you have on how we can buildup facilities and events in the greater Charleston area?” the answers were as follows:

- You need quality (playable) fields so that all levels of travel teams would be willing to come to the area to participate. Fields should have accessible bathroom areas and good concession stands.
- Find the right combination of level of play, age, gender to maximize use of space and time.
- If you build it they will come!
- Never been there, but make it kid friendly. Set up fields w/ drainage, etc. Trees and small hills are great for shade and dry spots...
- Increase awareness, money, make it affordable to more people

III. Literature Review of Economic Impact Studies

There have been numerous studies completed of sporting events ranging from small single-day tournaments to professional sporting events. We describe the findings of a wide range of studies to get a sense of the spending levels and economic impact of the tournaments. Most of these studies focused on soccer although their finding could be generalized to other sports with similar duration of events and percentage of out-of-town visitors. The studies are not directly comparable due to a variety of factors such as the year of the event, the affluence of the visitors, and the area's costs. The variable we focus on is spending per visitor, per day which adjusts for the duration of the event and the number of participants.

San Diego Surf Cup: two-weekend, 332 teams, 5400 participants, 92,000+ attendees; over 500 college coaches attend; 16,636 hotel rooms booked and \$17.08 million in economic impact in 2003; mean family income of \$104,188; Title sponsorship of \$250,000. A related series, the San Diego Surf Girls Cup had the following characteristics: 152 teams, 2500 participants, 25,000+ attendees.

This prestigious tournament draws teams from all over the country and a few international teams. This big-time tournament is rather different from what we might expect in WV in several respects – many teams fly in, there are 10 to 20 “fans” for each participant and the related families are quite affluent. Never the less this study provides a good template of the potential revenue categories and a simple economic multiplier model. In this study they simply multiply direct spending by two to get a rough estimate of additional spending will cascade through the economy. More sophisticated analysis could be used by the general findings would not greatly differ.

Table 2: Economic Impact of Surf Cup Tournament

	Surf Cup	Girls Cup	2003 Totals
Travel	3,006,988	1,138,104	4,145,092
Soccer Fields	79,800	51,200	131,000
Support activities	74,209	38,035	112,244
Parking Fees	102,000	44,500	146,500
On-site Retail Sales	233,649	124,052	357,701
Concession Sales	218,699	84,650	303,349
Tournament Payroll	35,577	11,920	47,497
Referees Expense	38,406	17,250	55,656
Tournament Hotel Exp.	12,355	4,300	16,655
Taxes Paid	271,348	105,677	377,025
Total Direct Spending	4,073,031	1,619,688	5,692,719
Econ Multiplier (x 2)	8,146,062	3,239,376	11,385,438
Economic Impact	12,219,093	4,859,064	17,078,157
Participants	5400	2500	7900
Direct Spending per participant, per day	\$189	\$162	\$180

Economic Impact per participant, per day	\$566	\$486	\$540
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Rock Hill, SC is perhaps one of if not the regional showcase. It has three major sports complexes – the Cherry Park softball facilities, the Rock Hill Tennis Center and the Manchester Meadows soccer complex (see www.rockhillrocks.com). The softball facility was the first site built and has established a strong regional presence; in 2002 there were 32 softball tournaments that brought in 1244 teams and 16,083 spectators. The realized economic impact from the softball tournaments is estimated to be more than \$5 million annually. The Tennis Center has just been completed with the hope to attract a multi-state tournament that would bring in 3000 players and \$9.6 million in new spending.

The state-of-the-art soccer facility features eight soccer fields, a large meeting facility, and several other amenities such as playground area and trails. The cost of \$12.4 million was underwritten by federal and state grants, a local hospitality tax and city funds. The facility eventually plans to host four, 2-day soccer tournaments generating \$2.4 to \$3.5 million in new spending. A survey conducted in the summer of 2006 at a two-day soccer event found that per day spending on lodging was \$87 and food \$40 for a typical two or three person party and trip costs for transportation, entertainment, and gifts were \$75, \$35, and \$46, respectively. This implies a per person, per day spending of \$106.

Crompton Meta-Study: An excellent study by John L. Crompton compares the economic impact of 30 sporting events with the four youth soccer tournaments summarized in Table 3. The range of total expenditures on these two to four day tournaments is \$128,519 to \$441,424. The comparable spending per team member per day ranges from \$45 to \$58. Crompton notes that this is only about half of the spending found in other sports events such as softball. He attributes that to a different culture surrounding softball although his conclusions are not based on the data. In contrast, the city of Rock Hill found the opposite to be true in their tournaments. Whereas the adult softball players would pack four guys to a room the soccer players generally stayed with only one or two in a room. Overall spending was significantly higher for the soccer events perhaps due to more affluent teams.

The Crompton study also highlights the important distinction between various measures of “economic impact”. He notes that most studies present Sales as the economic impact as it is the largest dollar amount. He goes on to argue that Income should be the more relevant factor for people within the community. Jobs also are a good measure of economic impact but could represent more hours (overtime) or part-time or seasonal jobs created by the tournaments.

Table 3: Summary of Four Soccer Economic Impact Studies

City	Event Name	Duration (Days)	# of Teams	Avg. Size of Team	# of Participants	Teams from inside the city		Teams from outside the city		Total Expenditures
						#	%	#	%	
A	Boys Soccer Tournament	3	68	15	1020	5	7.4	63	92.6	128,519
A	Girls Soccer Tournament	3	70	15	1050	0	0.0	70	100	160,956
B	Great Plains Soccer Shoot Out Tournament	2	N/A	N/A	1800	N/A	21	N/A	79	211,502
E	Invitational Youth Soccer Tournament	4	146	15	2190	20	13.7	126	86.3	441,424

Average Direct Expenditures				Economic Impact		
Per Team	Per Team Per Day	Per Team Member	Per Team Member Per Day	Sales	Personal Income	Jobs
2040	680	136	45	247,085	69,493	5.7
2299	766	1543	51	305,070	85,889	6.8
N/A	N/A	117	59	483,607	161,692	10.1
3503	876	234	58	825,534	287,878	16.7

Source: Table 11 in Measuring the Economic Impact of Visitors to Sports Tournaments and Special Events

Cedar Valley Moonlight Classic Soccer Tournament: July 2004, 3-day tournament, 62.6% out-of-town visitors but within a range of 215 or less miles from Waterloo/Cedar Falls. Most (88.5%) stayed over only one night with most (85.5%) staying in a hotel. The average party size of just over 3 people spent a total of \$116.19 per day or \$37.40 per person. The 23 out-of-town teams brought in approximately 1005 visitors who had a total direct spending of \$37,587 and the 42 teams paid \$13,000 in entry fees for a total direct impact of \$50,587.

Little Illini Orange & Blue Fall Cup Soccer Tournament: 1996 in Champaign-Urbana, IL, 103 teams (39 from IL), 1725 non-resident participants and 2743 other visitors. Average group size was 3.5 persons and stayed 1.6 nights, spending \$294 in the local economy or \$55.76 per person, per day. Direct spending by visitors totaled \$376,077 including team registration fees of \$27,875.

Table 4: Little Illini Spending Patterns

Category	Spending	Total
Lodging	115.6	136,870
Food	88.8	105,139
Retail Shopping	40.21	47,608
Souvenirs	11.49	13,604
Gas	25.53	30,228
Other	12.46	14,753
Team Reg. Fees		27,875
Total Direct Spending	294.09	376,077

Trace Fork: In South Charleston, WV will have a stated cost of \$2.4 million although much of this amount was in-kind contribution and did not reflect direct cash-flows. There will be seven fields where the hope/plan is to host up to 72 teams which sounds overly ambitious. They use an estimate of \$150 per person per day in their impact study.

WVSA Open Cup: More than 2000 players and 200 matches. 132 teams. 18 fields split between Barboursville City Park and the 4H camp (off Alt. Rt. 10). No economic impact study was completed for the Open Cup.

The spending per person per day amounts are summarized in the table below as this is a key component of the economic impact model.

Table 5: Summary of Spending per person per day.

Tournament	\$/day per visitor
Surf Cup (CA)	\$180
Rock Hill, SC	\$106
Crompton Study	\$45 to \$58
Cedar Valley, IA	\$37
Little Illini (IL)	\$56
Trace Fork (WV) (est.)	\$150
CVB (est.)	\$192

The wide range can partially be explained by the variety of locales and what variables were included in the spending. The smaller tournaments held in smaller cities have noticeably less spending. This is likely the result of the more local nature of the events where it was likely that participants came in for only one night and with little motivation to do any spending beyond what was absolutely necessary. These ‘low-key’ events are good for drawing some teams together that usually would not play each other but do not do much for economic development.

The Rock Hill, SC study is likely the most applicable for Charleston’s situation. This study is recent (2006), in this region of the country, and is based on actual youth soccer survey results rather than conjectures from other studies or events. The spending of around \$100 per day per person is also supported in the next section by a breakdown of highly plausible spending patterns at sporting events.

IV. Economic Impact Analysis of Sporting Events

The primary drivers of economic activity are the number of out-of-town visitors, how long they stay, and how much they spend. Event organizers really only have partial control over the middle variable with the other two driven by the attractiveness of the event and the spending habits of the attendees. The previous section gave an overview of spending patterns at youth soccer tournaments and will be further developed in this section. The second part of an economic impact model is accounting for the secondary effects of this new spending in the local economy. There is a “domino” or “cascading” type effect where the initial new spending translates into income for local residents which

in turn to a large degree is re-spent in the local economy. This cycle continues through several rounds with a conservative total effect on spending of 1.6 (retail) and 1.7 (food, lodging, & transportation). [These multipliers are based on the USFA model and are typical parameters used in economic impact studies.] Spending only partially accrues to local workers such that the total new local earnings are approximately half of the total new expenditures. The number of jobs created is proportional to earnings.

The following table provides an annual summary of the tournament once it has reached full stride. Although these are based on soccer tournaments, they could easily be applied to a variety of sporting events with slight modifications. The plan is to eventually have two, 2-day tournaments annually with 140 teams (75% from out-of-town). This would bring 12 fields to near-capacity and represents a scenario that may take a few years to actualize. The column to the right provides a brief interpretation of the variables in the main column.

Table 6: Parameters and Spending of a Major Tournament

Number of fields	12	Could be fewer initially to save \$.
Games per day per field	10	8am to 6pm
Maximum number of games per day	120	# fields x games/day/field
Tournament days	2	standard
<i>Games per team per tourney</i>	3	standard
<i>Maximum teams per tourney</i>	160	All fields used all day.
Teams per tournament	140	Near capacity
<i>Games per tournament</i>	210	2 teams/ game
Percentage of out-of-town teams	75.00%	Only visitors generate additional econ impact
Players per team	15	Standard
Guests accompanying each player	2	Similar to other studies.
Total out-of-town attendees per tourney	4725	Players + others
Spending per day per person:		
Meals	\$28.00	These \$'s are roughly based on
Retail Goods	\$33.00	the USFA estimates in tandem
Transportation Costs	\$7.00	with the survey and local rates
Hotel room	\$85.00	Ranging from \$50 to \$120
Guests per hotel room	2.5	standard
Spending per guest per day	\$102.00	Key variable!
Tournament fee per team	\$400.00	standard
Total Tournament fees	\$56,000	Fee * # of teams
Hotel rebates per room	\$0.00	This could be \$10.
Sponsorship money per tournament	\$0	Perhaps trophies.
Tournaments per year	2	Spring, fall

Using these flows of people and spending per person we can arrive at total direct spending. We then apply the multipliers of approximately 1.7 and 0.5 for Total Spending and Earnings, respectively.

Table 7: Summary of Economic Impacts from a Major Tournament

Out-of-town amounts per tourney	Direct Spending	Total Spending	Earnings	Employment
Meals	\$264,600	\$449,820	\$124,362	8.91
Retail Goods	\$311,850	\$498,960	\$159,044	11.40
Transportation Costs	\$66,150	\$112,455	\$33,075	2.37
Hotel room	\$321,300	\$546,210	\$163,863	11.74
Total out-of-town expenditures per tourney	\$963,900	\$1,607,445	\$481,950	34.54
Annual amounts	\$1,927,800	\$3,214,890	\$963,900	69

The table breaks amounts into four major categories – meals, retail, transportation, and lodging. These of course would be of interest to business owners in those sectors although the overall impact is of primary interest. One major tournament would generate about \$964,000 in visitor direct spending which translates into \$1.6 million in total spending and \$482,000 in local earnings and 34 jobs. Note however that dividing earnings by jobs mean that the new job (which could be overtime or part-time) earns only about \$14,000. In interpreting the job number it may be useful to divide the derived number by two or three to get a better measure of “well-paying” jobs created. With two tournaments per year the annual amounts are doubled the per tournament values.

The government is also a beneficiary of visitor spending. Sales, lodging and food taxes on the above calculated total spending will generated about \$199,000 in government revenues. Table 8 provides the breakdown among the tax bases. In fairness the taxes generally flow into the state coffers but localities will continue to benefit from this outside money. The taxes can be seen as a direct return to the government (or tax-payer) for providing this opportunity within the community.

Table 8: Local Taxes Generated from a Major Sports Tournament

Annual Taxes generated from tournament:	
Sales Tax (@6%)	\$59,875
Lodging tax (@6%)	\$65,545
Food tax (@5%)	\$44,982
Income tax (@3%)	\$28,917
Total annual tax impact:	\$199,319

The cost of building and maintaining several soccer fields can be imposing. Some of the facilities mentioned earlier were developed from scratch at a cost that ran into the several millions of dollars. Much of this capital cost can be avoided if we develop a site such as Shawnee Park that has the major infrastructure in place – parking,

bathrooms, utilities, a pavilion, and by WV standards a flat site. The cost of leveling the fields is estimated to be \$100,000 per field for a total of \$1.2 million. A full-time sports marketing and administrator (\$50,000) and a part-time assistant (\$25,000) would cost a total of \$75,000 annually in salary and benefits. Of course they could devote their energies to several projects in addition to the two proposed soccer tournaments. The other major cost would be field maintenance which would require personal, equipment and materials (e.g. water). These costs are only rough estimates and should be verified through a more extensive engineering survey. These costs could go up significantly if the fields are receiving heavy use during the non-tournament days which will likely happen. Note that we have not included expensive irrigation or lighting systems. The games are scheduled during daylight hours and depending on the soil and use, expensive irrigation may not be necessary. The total annual cost is approximately \$379,000 after the one-time capital investment of \$1.2 million.

Table 9: Capital and On-going Tournament Costs

Capital investment (one-time)	\$1,200,000
Annual tournament costs:	
Permanent Staff Members	\$75,000
Referees & Officials	\$42,000
Field Preparation & equipment	\$4,000
Marketing	\$50,000
Field Maintenance	\$200,000
Medical & Security services	\$8,000
Total annual tournament costs:	\$379,000

As mentioned earlier, a tournament of this magnitude will not happen over night. It may take a few years or longer to establish the tournament as an annual ritual for teams in the region. A reasonable ramp up might begin with a single tournament in the first year attracting 25% of the full capacity. A smaller tournament of 35 teams would allow organizers to establish routines and line up personnel such as referees. In the second year we assume two tournaments are offered at 50% of capacity (70 teams) and in the third year 75% capacity (105 teams participate) in two tournaments. There may be an incentive to develop only part of the fields but one could argue that it would be more efficient to go ahead and complete the full twelve fields while the construction workers and equipment are on site.

The following table applies this ramp-up effect beginning in 2007 and looking forward a decade (3% inflation is factored into all dollar amounts).

Table 10: Cash flows over Time Ramping up to Two Major Tournaments

Year	Cash Inflows	Cash Outflows	Net Cash Flow	Cumulative Cash Flows (undiscounted)
2007	\$145,402	\$1,579,000	(\$1,433,598)	(\$1,433,598)
2008	\$599,058	\$390,370	\$208,688	(\$1,224,910)
2009	\$925,545	\$402,081	\$523,463	(\$701,446)
2010	\$1,271,081	\$414,144	\$856,938	\$155,492
2011	\$1,309,214	\$426,568	\$882,646	\$1,038,137
2012	\$1,348,490	\$439,365	\$909,125	\$1,947,263
2013	\$1,388,945	\$452,546	\$936,399	\$2,883,662
2014	\$1,430,613	\$466,122	\$964,491	\$3,848,153
2015	\$1,473,532	\$480,106	\$993,426	\$4,841,578
2016	\$1,517,737	\$494,509	\$1,023,228	\$5,864,807

The cash inflows are from three sources: local earnings, team registration fees, and local taxes generated from visitor spending. The cash outflows in the first year are the large initial capital outlay and the first year expenses. In subsequent years the outflows are for on-going tournament and site expenses. It takes about four years under this ramping up scenario for the investment to breakeven. After that time revenues outpace cost by over a million dollars annually. The vast majority of money will accrue to local businesses and workers. The tournament organizers would receive tournaments fees (\$112,000 per year) and revenue from on-site concession and souvenir sales. The government / tax-payer benefits are around \$200,000 per year. Over a 10-year period the net present value (NPV) of the soccer complex would be \$5.5 million which translates into a return-on-investment (ROI) of 41%.

V. Strategic Planning

The economic impact analysis provides the basis for investing in the city's ability to attract sports-related visitors. This section characterizes a short-term plan for those projects that can be implemented in the near term with relatively modest costs. Additionally a long-term plan can be implemented that is contingent upon the success of the earlier initiatives.

The strategic plan must take into account potential competitors' responses in other major cities. Additional consideration will be given to the types of programs and facilities offering the greatest opportunity for success and how CVB can position Charleston to develop and build upon that success with other venues. Among the criteria CBER used to determine the best action plans are:

- A high economic impact and rate of return,
- Relatively modest up-front costs,
- A high probability of on-going success (niche market),
- Quick implementation (including physical development & planning),

- A high rate of non-tournament usage, and
- An ability to generate broad support within the community.

Although Charleston possesses a large variety of sporting venues (see Appendix B), by-and-large they do not represent anything out of the ordinary relative to other cities in the region. All cities have a scattering of sports fields owned by public schools and city parks & recreation. However not too many cities have a large single site with on-site amenities and a professional appearance. The best short-term (within a year or two) plan involves developing approximately half of Shawnee Park into a dozen soccer fields. The economic impacts would match the ramp-up scenario detailed in the previous section.

The Shawnee Park site has several positive, unique attributes relative to other potential sites in Charleston:

- **LOCATION:** It is in close proximity to the Interstate (right off I64) and within close proximity to lodging, restaurants, shopping and other tourist activities. See the map on the following page to see the site's proximity to Charleston and several existing local soccer leagues that could benefit from regular use of the facilities. Furthermore, WVSU is adjacent to the site and could co-develop facilities for student use.
- **INFRASTRUCTURE:** It has much of the expensive infrastructure already in place. A beautiful pavilion can serve as a welcome and administration center, some parking (about 100 spaces) is located adjacent to the pavilion, and abundant parking is available within a five to ten minute walk on the WVSU parking lots during the weekend.
- **LAND CONTOUR:** The site is well-suited for development into sports fields. It is relatively flat and contains some shade trees and ponds that add to the attractiveness of the facility. Furthermore it contains a "walking path" (currently a golf cart path) that winds throughout the entire park. The path may need to be redirected to accommodate the fields but generally could remain as a path around the fields and exercise course. There is enough space to develop a multi-sport site accommodating soccer, tennis, softball, and an indoor facility.

The loss of a 9-hole golf course may cause some concern from avid golfers or others who believe that ample golfing opportunities are essential for local residents and attracting new business. As only a 9-hole course of moderate length and difficulty its major appeal is as a convenient outlet for local golfers. It is expensive to maintain and there are several other golf courses located in close proximity to Charleston. The Shawnee 9-hole course had an estimated 20,000 to 22,000 rounds of golf played on it last year. At approximately \$20 for 18 holes this would be about \$400,000 in annual revenue. The conversion of Shawnee Park to a sports complex would leave several comparable golf facilities – Sandy Brae (15,000 rounds), Big Bend (26,500 rounds), Coonskin (15,000 rounds), Cato (2579 rounds) and Little Creek Country Club (14,000 rounds).

The site would initially be dedicated to soccer although presumably sports with similar field demands such as lacrosse or flag football could also be accommodated. The long-term plan would then develop the rest of the Shawnee Park to include softball or

other fields that are judged to be good candidates to attract visiting teams. This expansion would be contingent upon the success of the soccer tournaments in attracting good competition and generating economic activity in-line with the above projections. A rough estimate of doubling the facilities would result in a doubling of new spending from visitors.

What are the potential pit-falls in this success scenario?

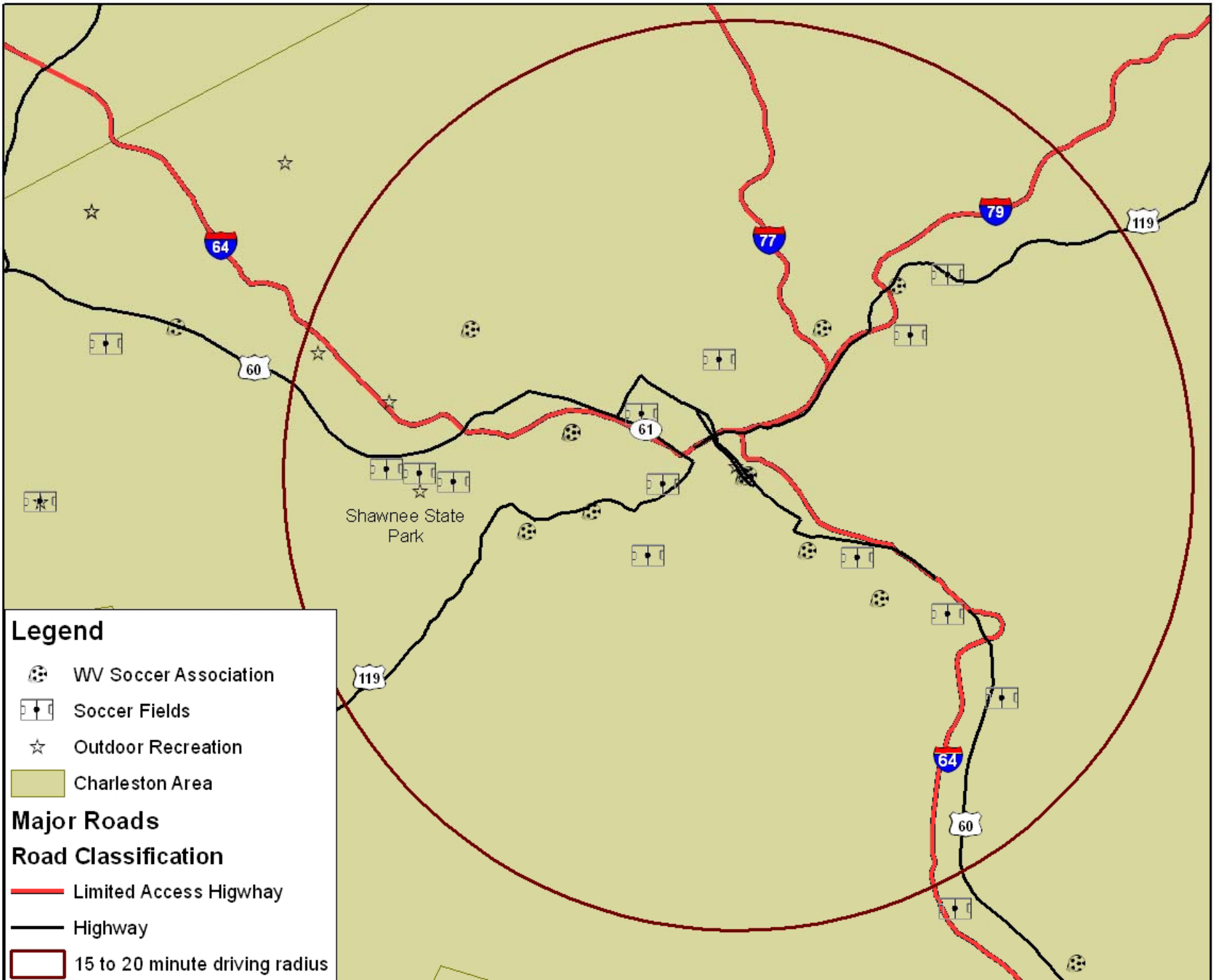
1. Competition from Paul Cline facility in Beckley, WV and the Trace Fork Fields in S. Charleston. These facilities are already built or nearing completion. While each has its shortcomings (too far out, too few fields) they may attempt to establish a similar presence in youth soccer given the resources that have been invested. One solution to this is to partner with these sites to leverage all the 'local' facilities.
2. Competition from surrounding regional cities. The main argument for Charleston as a host is its central location. However teams in major cities could rotate years being in their hometown one year and traveling a full-day the next year. This scenario may come to fruition making it difficult to attract the top national teams. However Charleston could still serve as a regional hub attracting teams of various seriousness and skill level into the Kanawha Valley. The economic impact of a tournament is driven by people spending money no matter what the quality of their play. This may suggest focusing on a less competitive league that offers a unique experience for disabled or adult/senior players.
3. Although soccer's popularity will likely continue to soar, it may become more localized as many cities establish tournaments within a short hour or two drive. This would diminish the out-of-state visitors to Charleston but the city would be well positioned to become the state focal point for soccer. Several of the survey respondents expressed a wish that tournaments would become more readily available within a short drive.
4. Insufficient effort and resources go into coordinating and promoting the tournaments. Although one survey respondent suggested "Build it and they will come!" it will likely require a steady, quality promotional campaign to establish and maintain the status of the tournaments. Communications with sports advocates in Greensboro (NC), Rock Hill (SC), Virginia Beach (VA) and North Little Rock (AK) uniformly indicated a dedicated organizational and marketing presence either through a sports commission, soccer association or other non-profit organization.

The economic impact estimates are based on the establishment of two major tournaments a year. This outcome is certainly plausible but could be diminished by competitive pressures or other unforeseeable outcomes. One important point is that the development and maintenance of a soccer complex is quite modest relative to whatever cities have invested in building sports venues. A worst-case scenario might involve only being able to attract largely WV teams to a couple tournaments. However the site would certainly receive significant use from local clubs and help promote sports participation and fitness within the community. A review of several medium-sized cities (comparable to Charleston) did not reveal any who did not have a sports complex serving local residents and potentially attracting regional competition.



The medium to long-range plans could look something like the picture above (Note: the soccer fields, softball/baseball fields, tennis courts, and building to the west of the pool are super-imposed images from elsewhere in the aerial photo). The initial plans involve building eight to twelve full-sized soccer fields (note that the images are 120 yard football gridirons; junior fields would be less than half this size). It is recommended that the sites be regularly reviewed for participant use and satisfaction. A simple, sample survey is included in Appendix C which is based on a survey conducted at each tournament in Rock Hill, SC. If public support is found to expand the facilities than a number of options are possible. The figure above adds five full-sized baseball diamonds and two smaller ball-fields on the south side of Shawnee Park. It also doubles the tennis courts and adds an indoor facility to the west of the current pool. This indoor facility could be used for gymnastics, basketball or other events. One further idea suggested by a member of the CVB is to enclose the pool to allow year-round use.

This picture is meant to provide a basis for discussion of how Shawnee Park could be developed into a multi-sport complex that would support local and regional sporting activities. The super-imposed images give an idea of what could fit within the park boundaries although different configurations are certainly possible. The benefits listed above of hosting several sports at a single site with first-rate facilities cannot be overemphasized. This site would become a selling point for the community and WVSU that would go well beyond the direct benefit of hosting sporting events. These plans meet all the criteria necessary to be a wise investment for the City of Charleston. The time to act on these opportunities is now in order to begin establishing Charleston as a place to visit and live.



VI. References

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Appendix A: Sample of the Coach Survey Questions

This survey is being conducted by The Center for Business & Economic Research (CBER) at Marshall University at the request of the Charleston Convention & Visitors Bureau. The primary purpose of the study is to provide a blueprint for better utilization of area sports facilities and to foster local and regional youth sports participation in the greater Charleston area.

The survey is targeted to coaches who have or will be involved with a traveling team. However we are keenly interested in the input of other interested parties (e.g. local coaches, parents, etc.). Please feel free to answer the relevant questions in the survey that will provide us with guidance on how to structure these programs. Note that the wording is appropriate for most sports (“tournament”) but not all. Please substitute the appropriate word (“track meet”) to fit your situation.

Contact Information

Name	<input type="text"/>
Address [Complete only the contact info if you want to be contacted or receive a final report.]	<input type="text"/>
City	<input type="text"/>
State	<input type="text"/>
Zip	<input type="text"/>
Phone Number	<input type="text"/>
E-mail	<input type="text"/>
Would you like to be contacted by the survey team to provide further information?	<input type="checkbox"/> Yes <input type="checkbox"/> No
Would you like a copy of the final report?	<input type="checkbox"/> Yes <input type="checkbox"/> No

A. Sports Involvement

1. What is your involvement with youth sports?	<input type="checkbox"/> travel coach <input type="checkbox"/> local coach
--	---

	<input type="checkbox"/> parent <input type="checkbox"/> player <input type="checkbox"/> administrator <input type="checkbox"/> business owner/manager <input type="checkbox"/> other
<p>2. What sports are you recently or currently active in coaching?</p>	<input type="checkbox"/> soccer <input type="checkbox"/> baseball <input type="checkbox"/> basketball <input type="checkbox"/> swimming <input type="checkbox"/> football <input type="checkbox"/> gymnastics <input type="checkbox"/> track & field <input type="checkbox"/> other
<p>3. Which of the following describes your travel team?</p>	<input checked="" type="checkbox"/> 'pure' travel team <input checked="" type="checkbox"/> all-star team <input checked="" type="checkbox"/> sports camp <input checked="" type="checkbox"/> school team <input checked="" type="checkbox"/> AAU or similar organization
<p>4. What age group(s) have you coached?</p>	<input type="checkbox"/> 5 and under <input type="checkbox"/> 6 to 8 <input type="checkbox"/> 9 to 11 <input type="checkbox"/> 12 to 15 <input type="checkbox"/> 16 and over
<p>5. How many players have been on your teams?</p>	
<p>6. What gender were your teams?</p>	<input checked="" type="checkbox"/> Boys <input checked="" type="checkbox"/> Girls <input checked="" type="checkbox"/> Mixed
<p>7. How many tournaments have your teams typically competed per year?</p>	

8. Briefly describe (when, where, why) the events you have attended outside your city/local area for tournaments. [Please add enough detail (team name, dates) so we can avoid double-counting.]

B. Tournament/Locale Preferences

1. How far would your team be willing to travel for a tournament (one-way)?	< 1 hr 1 to 3 hrs half-day full-day
2. Would a longer distance trip (half- or full-day) be motivated by the tournament being an official qualifying or championship tourney?	1=definitely not 2= maybe 3 = neutral 4=probably 5=definitely yes
3. Would a longer distance trip (half- or full-day) be motivated by the attractions offered in the area?	1=definitely not 2= maybe 3 = neutral 4=probably 5=definitely yes
4. What length of tournament is ideal for you team?	Half-day 1-day 2-day 3-day Week
5. What months are best for your team to travel?	<input type="checkbox"/> January <input type="checkbox"/> February <input type="checkbox"/> March <input type="checkbox"/> April <input type="checkbox"/> May <input type="checkbox"/> June <input type="checkbox"/> July <input type="checkbox"/> August <input type="checkbox"/> September <input type="checkbox"/> October

	<input type="checkbox"/> November <input type="checkbox"/> December																														
<p>6. Would your team(s) be interested in a multi-day sports camp?</p>	<input checked="" type="checkbox"/> No <input type="checkbox"/> Yes / One sport <input type="checkbox"/> Yes / Multi-sport																														
<p>7. Rate the following attractions' popularity as a compliment to a tournament by putting the importance score to the right of each item according to the scale:</p> <p>1 = not a factor 2 = slight factor 3 = neutral 4 = strong factor 5 = must have attraction</p>	<table border="1"> <tr><td>Swimming pool at hotel</td><td>▼</td></tr> <tr><td>Water Park (w ave pool, big slides)</td><td>▼</td></tr> <tr><td>Beach (lake or ocean)</td><td>▼</td></tr> <tr><td>Tubing / whitewater</td><td>▼</td></tr> <tr><td>Amusement Parks (e.g. Kings Island)</td><td>▼</td></tr> <tr><td>Fun Parks (go-carts, batting cages, Putt-Putt)</td><td>▼</td></tr> <tr><td>Hiking / repelling</td><td>▼</td></tr> <tr><td>Quads / off-road biking</td><td>▼</td></tr> <tr><td>Mountain biking</td><td>▼</td></tr> <tr><td>Mall shopping</td><td>▼</td></tr> <tr><td>Outlet mall shopping</td><td>▼</td></tr> <tr><td>Fast food outlets</td><td>▼</td></tr> <tr><td>Mid-level restaurants (e.g. Ponderosa, Chili's)</td><td>▼</td></tr> <tr><td>High-end restaurants (\$\$\$)</td><td>▼</td></tr> <tr><td>Golf</td><td>▼</td></tr> </table>	Swimming pool at hotel	▼	Water Park (w ave pool, big slides)	▼	Beach (lake or ocean)	▼	Tubing / whitewater	▼	Amusement Parks (e.g. Kings Island)	▼	Fun Parks (go-carts, batting cages, Putt-Putt)	▼	Hiking / repelling	▼	Quads / off-road biking	▼	Mountain biking	▼	Mall shopping	▼	Outlet mall shopping	▼	Fast food outlets	▼	Mid-level restaurants (e.g. Ponderosa, Chili's)	▼	High-end restaurants (\$\$\$)	▼	Golf	▼
Swimming pool at hotel	▼																														
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Outlet mall shopping	▼																														
Fast food outlets	▼																														
Mid-level restaurants (e.g. Ponderosa, Chili's)	▼																														
High-end restaurants (\$\$\$)	▼																														
Golf	▼																														
<p>8. What hotel amenities are most important to your team if you are spending two nights out-of-town:</p> <p>1 = not a factor 2 = slight factor 3 = neutral 4 = strong factor 5 = must have attraction</p>	<table border="1"> <tr><td>Hotel indoor pool</td><td>▼</td></tr> <tr><td>Hotel outdoor pool</td><td>▼</td></tr> <tr><td>Hotel restaurant</td><td>▼</td></tr> <tr><td>Hotel in 'safe part of town'</td><td>▼</td></tr> <tr><td>Block of rooms together</td><td>▼</td></tr> <tr><td>Price</td><td>▼</td></tr> <tr><td>Proximity to restaurants</td><td>▼</td></tr> <tr><td>Proximity to attractions</td><td>▼</td></tr> <tr><td>Proximity to tournament</td><td>▼</td></tr> </table>	Hotel indoor pool	▼	Hotel outdoor pool	▼	Hotel restaurant	▼	Hotel in 'safe part of town'	▼	Block of rooms together	▼	Price	▼	Proximity to restaurants	▼	Proximity to attractions	▼	Proximity to tournament	▼												
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Price	▼																														
Proximity to restaurants	▼																														
Proximity to attractions	▼																														
Proximity to tournament	▼																														
<p>9. Rank these various tournament structures according to preference:</p>	<table border="1"> <tr><td>1 game/day</td><td>▼</td></tr> <tr><td>2 games/day</td><td>▼</td></tr> <tr><td>Single elimination</td><td>▼</td></tr> </table>	1 game/day	▼	2 games/day	▼	Single elimination	▼																								
1 game/day	▼																														
2 games/day	▼																														
Single elimination	▼																														

1 = bad idea / unnecessary

2 = okay idea

3 = neutral

4 = good idea

5 = great idea

Double elimination

Round-robin

Short games w ith several games/day

Shortened field (higher scoring, more games/day)

Lighted field

Parking

"High-end, fancy" fields or courts

C. Spending

1. Supposing the whole team stays in the same place, what of the following is the most likely type of accommodations that would be used?

- Camping / RV
- Stay with friend(s)
- Hotel, less than \$40 a night
- Hotel, \$40 to \$80 a night
- Hotel, \$81 or more a night

2. What type of meals would the players typically choose?

- Select a Breakfast Skip, Pack, onsite
Concession, fast-food, hotel, mid-level restaurant,
high-level restaurant
- Select a Lunch Skip, Pack, onsite
Concession, fast-food, hotel, mid-level restaurant,
high-level restaurant
- Select a Dinner Skip, Pack, onsite
Concession, fast-food, hotel, mid-level restaurant,
high-level restaurant

3. What mode of transportation would the team typically use to travel to a tournament?

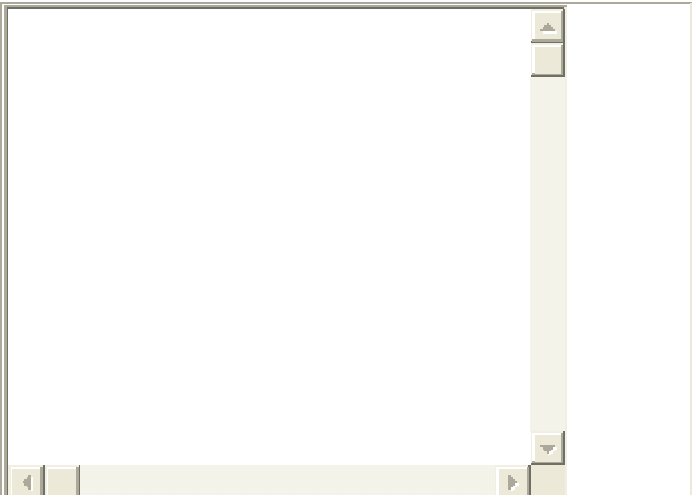
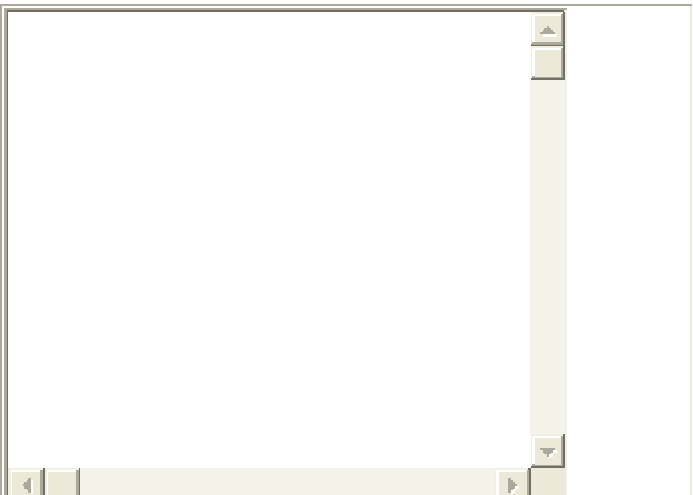
- Bus
- Van(s)
- Car-pool
- Mostly separate vehicles
- Airplane

4. How many accompanying parents and other family members would travel to the tournaments?

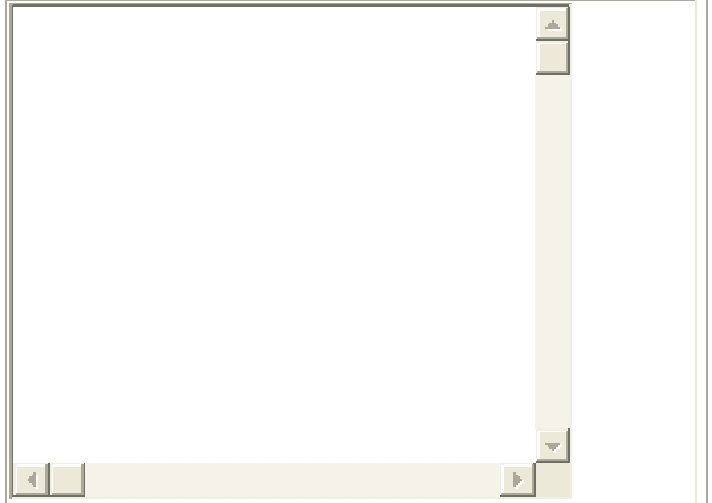
- None
- Just a few
- One per player
- Two per player

	<input type="checkbox"/> Three per player <input type="checkbox"/> Four or more per player
5. How much money is spent on souvenirs (t-shirts) by the typical player?	\$0 1 to \$10 \$11 to \$20 \$21 to \$30 \$31 to \$40 \$41 to 60 \$61 to \$100
6. How much money is spent by parents at retail outlets?	\$0 \$1 to 10 \$11 to \$30 \$31 to \$70 \$71 to \$100 \$101 to \$200 \$201 to \$300

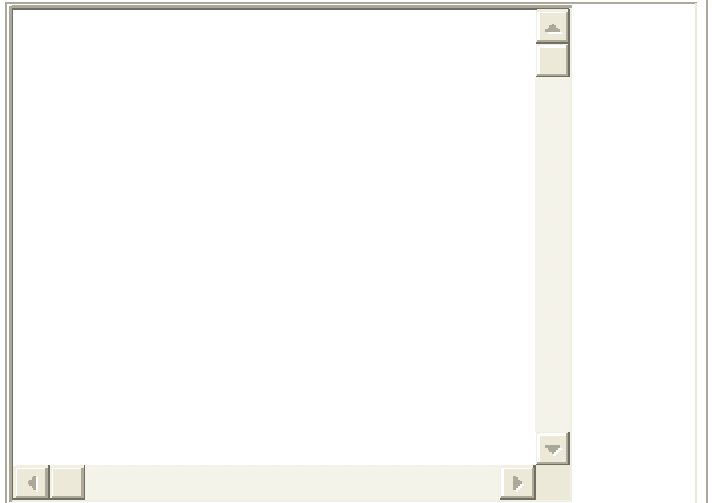
D. The Future...

1. What cities would you be interested in traveling to compete? Why?	
2. Has the travel team concept grown in popularity within your league/community? If so, what have been the drivers of the increased interest?	

3. Are there aspects of traveling that could be improved that would greatly increase participation (e.g. no Sunday games, closer tourneys, better amenities, etc.)?

An empty rectangular text box with a light beige background and a thin black border. It contains no text or images.

4. Do you have any other suggestions or comments on how we can build-up facilities and events in the greater Charleston area?

An empty rectangular text box with a light beige background and a thin black border. It contains no text or images.

Appendix B: Inventory of Public Sports Venues within Greater Charleston

	Baseball/Softball Fields	Basketball – indoor	Basketball – outdoor	Fitness Center / Trail	Golf Course	Locker Room	Restrooms	Multi-Purpose Facility	Picnic Shelters	Playground	Concessions Stand	Soccer Fields	Stadium	Swimming Pool – indoor	Swimming Pool – outdoor	Tennis Courts
COMMUNITY CENTERS																
Kanawha City Community Center	•	•		•		•		•	•		•				•	•
MLK, Jr. Community Center	•	•		•		•		•		•	•				•	•
North Charleston Community Center	•	•	•	•		•		•	•	•	•				•	•
Vandalia Neighborhood Center			•					•	•	•					•	
PARKS																
Cato Park					•	•		•	•	•	•	•			•	
Daniel Boone Park								•								
Danner Meadow Park				•				•	•							
Davis Park																
Elk River Park East																
Elk River Park West																
Gardner Park																
Lee Street Triangle																
Magic Island Park				•												
Oakmont Park	•		•					•	•							
Ruffner Park																
Slack Plaza																
Sunset Park			•					•	•							

	Baseball/Softball Fields	Basketball – indoor	Basketball – outdoor	Fitness Center	Golf Course	Locker Room	Restrooms	Multi-Purpose Facility	Picnic Shelters	Playground	Concessions Stand	Soccer Fields	Stadium	Swimming Pool – indoor	Swimming Pool – outdoor	Tennis Courts
PLAYGROUNDS																
57 th Street Playground			●							●						
Coal Branch Playground			●						●	●						
Lewis Street Playground										●						
Oakridge Playground			●							●						
Rugby Street Playground									●	●						
South Park Playground			●	●					●	●						
Spence Drive Playground			●							●						
Sugar Creek Playground			●							●						
Westmoreland Playground			●						●	●						
OTHER AREAS																
Bigley Athletic Fields		●					●		●	●	●					
Edgewood Tennis Courts																●
Haddad Riverfront Park																
Appalachian Power Park		●					●				●		●			
CHARLESTON HOUSING AUTHORITY																
Hillcrest Playground #1			●							●						
Hillcrest Playground #2										●						
Little Page Terrace Playground										●						
Oakhurst Playground #1										●						
Oakhurst Playground #2										●						
Washington Manor Meredith Court Playground										●						
Washington Manor Pebbles Court Playground										●						
Washington Manor Jeffries Court Playground										●						
South Park Village Playground										●						

	Baseball/Softball Fields	Basketball – indoor	Basketball – outdoor	Fitness Center / Trail	Golf Course	Locker Room	Restrooms	Multi-Purpose Facility	Picnic Shelters	Playground	Concessions Stand	Soccer Fields	Stadium	Swimming Pool – indoor	Swimming Pool – outdoor	Tennis Courts
GOLF COURSES:																
Cato Park Golf Course					●		●									
Coonskin Golf Course					●		●									
Kanawha Country Club					●		●									
Shawnee Golf Course					●		●									
Big Bend Golf Course					●		●									
Scarlet Oaks Golf Course					●		●									
Meadowland Golf Course					●		●									
Sleepy Hollow Golf Club					●		●									
Sandy Brae Golf Course					●		●									
Sycamore Creek Golf Club					●		●									
Tennis Indoor Center						●	●									●
Teays Valley Tennis Center						●	●									●

Appendix C: Sample Participant Survey for Regional Event

Instructions: Please complete the following information and turn in the form at the nearest concession stand for a complimentary 10 oz. fountain drink.

1. Where is your home? (city, state) _____
2. How long will you be staying in Charleston? Days ____ Nights ____
3. Where are you staying during your trip?
Hotel (name) _____, Friends____, Camping____
4. What mode of travel did you use? __Car __Bus __Plane __other
5. How many traveled in your party's vehicle? ____adults ____children
6. How did you hear about this tournament?
__attended previous year __flyer __email __website __coach /friend
7. Approximate spending per person for the people in your party:

Food (per day)	
Lodging (per day)	
Transportation (per trip)	
Entertainment (per trip)	
Gifts / Misc. (per trip)	

8. Please rank your level of satisfaction on a 5-point scale with 5 being very satisfied, 3 neutral, and 1 unsatisfied.

Park facilities	5	4	3	2	1
Game schedule	5	4	3	2	1
Level of competition	5	4	3	2	1
Hotel	5	4	3	2	1
Entertainment	5	4	3	2	1
Shopping	5	4	3	2	1

9. Please provide any additional comments of what you enjoyed during your stay in Charleston as well as how we can make the experience even better in the future.