

SPORTS TOURISM STRATEGIC PLAN

**CHARLESTON WV
CONVENTION & VISITORS BUREAU**



May 12, 2022

POWERED BY THE HUDDLE UP GROUP



May 12, 2022

Tim Brady
President and CEO
Charleston WV Convention & Visitors Bureau
800 Smith St.
Charleston, WV 25301

Dear Mr. Brady,

Thank you for your efforts on our recent work in the Charleston region. You, your team, and your community stakeholders have been quite helpful throughout this process. The groundwork we have set with your local leadership will serve as a strong foundation for future sports tourism, venue, and event development efforts in Charleston, West Virginia.

Enclosed is the report detailing our findings. This report includes a SWOT analysis, an overview and evaluation of the venue inventory in the Charleston area, and recommendations to enhance your destination's sports tourism efforts in the future. Both the SWOT analysis and the recommendations are built on a "Powers of Three" foundation (in most cases, no more than three focus areas for each section).

Please let me know if you have questions about the enclosed recommendations leading up to the roll out of the report and community presentation. We are looking forward to our next visit and our follow-up discussions.

Thank you again for all your support throughout this process!

Yours in Sport,

A handwritten signature in blue ink, enclosed in a thin yellow rectangular border. The signature is stylized and appears to read 'EO'.

Eric Olson
Principal
Huddle Up Group, LLC



Charleston, WV Convention & Visitors Bureau
Sports Tourism Strategic Plan
Executive Summary

In the opinion of the Huddle Up Group (hereafter the “Consultant” or “Consultant Team”), the Charleston WV Convention & Visitors Bureau (“CCVB”) has an opportunity to solidify itself as a strong sports tourism destination in the region. Throughout this process, community leaders showed a desire to grow sports tourism in the region and for the new sports and events brand to become engaged with the area’s stakeholders. These are both positive signs that the Charleston area is ready to grow sports tourism in the region.

This strategic planning project was conducted with the input of three (3) members from the Consultant Team and included our 6-step process, highlighted by the following elements:

- Three (3) in-person and six (6) phone interviews with Charleston area leaders.
- 18 electronic survey responses from CCVB stakeholders.
- Two (2) in-person town hall meetings with local stakeholders.
- Tours of eight (8) different sites that encapsulate 16 sports and event venues.
- Benchmarking against high performing venues both regionally and nationally.
- An analysis of best-in-class sports commissions of similar market size and structure to the CCVB.
- A rating of the CCVB through the Sports Tourism Index™ (a proprietary benchmarking tool developed by the Huddle Up Group, summarized in Appendix E).

The enclosed report offers a SWOT analysis and recommendations for the creation of a sports brand within the CVB (hereafter this may be referred to as the new “sports commission”) and an enhanced sports tourism marketing program. This document offers depth on each recommendation along with back up research and benchmarks that support each of the suggestions made by the Consultant Team. For each recommendation, action items and benchmarks are provided. In summary, there are four (3) primary and four (4) secondary recommendations, each of which is detailed in the full report:

Primary Recommendations – Sports & Events Organization Structure

1. Sports Brand
2. Mission Statement, Objectives, and Goals
3. Organization & Board Structure

Secondary Recommendations – Long-Term Action Plan

1. Dedicated Sports Staff
2. External Focus
3. Regional Sports Tourism Master Plan
4. Sustainable Funding Mechanisms

The opportunity at hand is to put in place an enriched sports tourism support system that engages all stakeholders throughout the Charleston area to drive economic development and improve opportunities for community user groups. Through a community-wide effort, the CCVB can drive increased economic activity through sport in the form of additional overnight stays, which will provide more lodging and sales tax revenues to the region year over year. Given the opportunities that exist and the numerous organizations that could play a key role, the Consultant Team believes the new sports and events commission is the ideal entity to lead the development and enhancement charge on behalf of the Charleston community.

Charleston, WV Convention & Visitors Bureau
Sports Tourism Strategic Plan
Synopsis

The sports tourism industry has grown consistently over the past 20 years. The study by the Sports Tourism and Events Association – *State of the Industry Report 2021*, states that the participant driven portion of the domestic sports tourism sector is responsible for more than \$39.0 billion in direct spending as of the end of 2021 as compared to \$15.0 billion in 2019. This direct spending generated a total economic impact of \$91.8 billion in the local economy, driving over 635,000 jobs and \$12.9 billion in taxes. Add to this industry growth the increased popularity of sports such as BMX, pickleball, quidditch, e-gaming and ultimate, the opportunity for the continuing expansion of economic development through sports tourism is tangible.

Throughout the research process, it became apparent to the Consultant Team that there is an opportunity for the CCVB to enhance its presence in the sports tourism market through the creation of a sports and events brand. The key moving forward is for community stakeholders to work together through CCVB in developing tourism driving assets that can deliver upon the sports tourism mission of the CCVB on a recurring basis from one year to the next. Through the execution of a strategic and targeted game plan, the CCVB will enhance Charleston’s position regionally and nationally in the sports tourism industry.

Methodology

The Consultant Team conducted an audit on the current sports tourism work of the CCVB and an analysis of the area’s sporting venues. The audit included two multiple day market visits (December 16-17, 2021 & February 28 – March 1, 2022), three (3) in-person meetings, six (6) phone interviews, 18 electronic survey responses, and two (2) stakeholder town hall meetings. Stakeholders that were engaged included CCVB staff and board, community leaders, athletic administrators, event owners, hospitality industry executives, and local club leaders that were identified by the CCVB. The Consultant Team also visited eight (8) existing or planned sports and entertainment sites, which included 16 venues in total. The facilities listed below, and in Appendix D along with a rating for based on its current ability to attract sports tourism driving events.

- Appalachian Power Park
- Calvin L. Bailey Field
- Charleston Coliseum
- Charleston Coliseum & Convention Center
- Charleston Coliseum & Convention Center - Theater
- Charleston Municipal Auditorium
- Coonskin Golf & Disc Golf Course
- Lady Jackets Field
- Lakin-Ray Field at West Virginia State University
- Schoenbaum Soccer Stadium
- Shawnee Sports Complex - Diamonds
- Shawnee Sports Complex - Flat Fields
- University of Charleston Laidley Field
- University of Charleston Laidley Field - Track
- University of Charleston Wehrle Arena
- Walker Convocation Center at West Virginia State University

The audit was led by Huddle Up Group Principal Eric Olson (St. Louis, MO) and Director Dean Polk (Martinsburg, WV), with support from Founder + CEO, Jon Schmieder (Phoenix, AZ). The audit focused on five (5) areas:

1. Evaluating the current sports tourism efforts of the CCVB.
2. Assessing the current facility inventory and quality.
3. Benchmarking of the current facilities using the Sports Tourism Index™ as a scoring tool.
4. Offering a list of “Best in Class” sports commissions that currently exist in destinations similar in make up to Charleston, West Virginia.
5. Providing a gap analysis of community-wide efforts and recommendations for a sports and events commission structure that could drive increased tourism to the market through sports.

Discussions were held around national best practices in these theme areas and focus was given to applications for the CCVB. The intent of this process was to create community support for the CCVB’s increased sports tourism program by giving local stakeholders a voice, and to foster a teamwork mentality throughout the Charleston area.

The Consultant Team took the results from stakeholder interviews as well as the data from the Sports Tourism Index™ and the site visit to the Charleston region, then overlaid national best practices from several “Best in Class” sports commissions to develop and deliver the enclosed recommendations. These recommendations are intended to spark a dialog within the community’s leadership hierarchy in order to build a framework for next steps on an expanded sports and events tourism marketing effort.

The recommendations presented here are based upon what the Consultant Team believes are four (4) universal truths about Charleston’s tourism and sports market position:

1. There is a desire to grow sports tourism in the region.
2. Though the area lacks the necessary participant-based anchor facilities, there are existing facilities in place to drive a sports tourism strategy.
3. The regional competition is fierce, and there is a focus on facility investment throughout the area.
4. Charleston is well located geographically to be a strong sports tourism player both in West Virginia and the Mid-Atlantic/Southeast Region.

Charleston, WV Convention & Visitors Bureau
Sports Tourism Strategic Plan
SWOT Analysis

It is the opinion of the Consultant Team that there is an opportunity to grow sports tourism in Charleston, West Virginia. Through our extensive analysis and our knowledge of the national marketplace, we believe there is room for the CCVB to deliver additional overnight stays to the destination through sports and events. An expanded sports tourism effort will lead to increased economic development and will positively impact the community over time.

In a market the size of the Charleston area, with its numerous positive attributes, it is critical that grass roots sports tourism as well as special events continue to serve as economic drivers for the local economy. Keeping that in the forefront of the CCVB's objectives and focusing on the creation of a new sports and events brand/commission, below is a SWOT analysis of the status of the CCVB and Charleston area as a sports tourism destination.

Strengths

1. Location – Charleston's location on the border of both the Mid-Atlantic and Southeast regions provide the city with an excellent opportunity to host events on the East Coast. The area is easily accessible geographically via ground transportation as it sits in the center of the state and is also within a short drive of numerous major metropolitan areas including Columbus, Cincinnati, Cleveland, Louisville, and Charlotte, and Pittsburgh among others.
2. Partnerships – There are numerous entities that currently exist in the Charleston area that could be long-term partners (examples: University of Charleston, West Virginia State University, various parks & recreation departments, Charleston Coliseum & Convention Center, Shawnee Sports Complex, Charleston Dirty Birds, Vantage Volleyball, WVSSAC, etc.). There are also potential partnerships to be had with entities that don't currently have a significant presence in Charleston that would likely want to have one (examples: NCAA, USA Volleyball, USA Track and Field, Varsity Spirit).
3. Existing Facilities – Many of the sports facilities that are in place in the Charleston area today are flexible and score very well on the Sports Tourism Index™. Specifically, the Charleston Coliseum & Convention Center, earned a platinum designation (scored among the Top 10% of all facilities of its type) as an arena, indoor court venue, pickleball venue, and convention center. Additionally, Laidley Field also earned a platinum designation as a track venue while Appalachian Power Park (baseball stadium) and Shawnee Sports Complex (flat field complex) both earned gold designations.

Weaknesses

1. **Airlift Service** – From our survey asking respondents to rank various elements of the Charleston area as a destination, the region’s air accessibility received the lowest overall average score. While the closest airport (West Virginia International Yeager Airport) is located just a few minutes from downtown Charleston and has service from Delta, American, United, and Spirit, it currently has daily flights to only four destinations: Charlotte, Washington DC, Chicago, and Atlanta. The closest major airport (Columbus, OH) is located over two and one-half hours by car from downtown Charleston. Additional flights to and from Yeager Airport (CRW) would positively contribute to the sports tourism effort of the region.
2. **Attractions** – It became apparent during our visits and in our interviews that the region lacked the attractions and entertainment options available to many of its competitors. Many rights holders today are designing event schedules to allow participants and their families more down time to enjoy and explore the destination they are hosting their event in. In surveying rights holders across the industry, many indicate that the number of attractions, restaurants, shopping, among other activities were important factors in deciding where to host events.
3. **Reputation** - Another common worry of those who were phone interviewed or surveyed electronically was the negative perception, from outsiders, about the city, state, and region being a deterrent to attracting tournaments, events, and visitors. While many communities struggle with negative perceptions related to safety, poverty, and drugs the most successful destinations we’ve seen have launched programs, campaigns, and even instituted new sales taxes to assist public safety. These new initiatives focus on creating a safer community which result in more positive headlines and perceptions.

Opportunities

1. **Dedicated Staff** – The Charleston CVB currently lacks the dedicated staff to effectively sell and service the Charleston area as a sports tourism destination. Numerous survey respondents mentioned that they thought the CCVB staff did a great job with the resources they currently had but believed the addition of staff members focused solely on selling, marketing, and servicing sports and events in the Charleston area would be a tremendous asset to the community. Nearly all the high performing sports tourism organizations spend considerable time and resources supporting their event partners before, during, and after their events take place. The Consultant Team calls the active support to the rights holder by the host destination “wearing backpacks”. Sports commissions, CVBs, or DMOs that can put on the “backpacks” and help the event organizer outside the field of play, free up that event owner to focus entirely on the proper execution of their championship. This added level of support leads to a higher renewal rate between the event owner and those “backpack” destinations, which sustains their sports tourism business year over year, and allows the destination to be more selective when trying to fill out their annual event calendar. Virginia Beach Sports Marketing and Richmond Region Tourism are two of the best at putting on their “backpacks” come gameday and either would serve as an excellent model for the new sports commission to emulate.

2. Facility Enhancement/Development – While there are a few high performing venues in the area that are already in place and hosting sports tourism events to their capacity, some of these facilities have already begun considering potential expansion projects to increase their inventory while others in the area are in need of major renovations and have – or face the threat of – losing events and tenants to newer/bigger venues in nearby towns that have more amenities. In today’s sports facility arms race “tournament friendly” and “anchor” facilities are needed to attract top tier participant focused championships and their related tourism dollars.

An “anchor” facility is defined as a venue that has enough fields/courts/sheets on its own to host major regional or national events all in one location. In addition to the pure number of fields/courts/sheets, the top anchor facilities in the country also provide key amenities that event rights holders need to host high quality events. A “tournament friendly” facility is defined as a venue that has an adequate number of fields/courts/sheets to host local and regional events, however, would need to be cobbled together with additional locations to host larger national level events.

Without added facility options, the CCVB will be fighting an uphill battle against communities with newer and/or bigger venues (example: Barbourville Soccer Complex and The Bridge Sports Complex). Below is benchmarking information from a Huddle Up Group survey of over 300 event rights holders, outlining their ideal facility requirements for the most commonly used/constructed venues.

Facility Type	Anchor	Tournament Friendly
Flat Fields	Minimum 16 fields	8-15 fields
Pool	50m/8-10 lanes with diving well	25m with diving well
Diamonds	Minimum 12 fields	8-11 fields
Hardwood Courts	Minimum 8 Basketball/ 16 Volleyball	4 Basketball/8 Volleyball
Ice	3+ Sheets Hockey/ 6+ Sheets Curling	2 Sheets Hockey/ 4 Sheets Curling
Tennis	Minimum 12 courts	Minimum 6 courts
Pickleball	40-60 Courts (National)	8-16 Courts (Local) 24-32 Courts (Regional)
Indoor Track	200 meter/6 lanes/banked	200 meter/6 lanes

The following is a list of some of the top performing sports tourism driving facilities in the country. Some of whom do or will directly compete with the CCVB. These destinations include, but are not limited to the following, each with best-in-class sports complexes that meet the tournament friendly or anchor facility benchmarks:

- Aurora Sports Park (Aurora, CO)
- Bill Gray’s Regionals Iceplex (Rochester, NY)
- Champions Center (Appleton, WI)
- Crossplex (Birmingham, AL)
- Dick’s Sporting Goods Park (Commerce City, CO)
- ESPN Wide World of Sports Complex (Lake Buena Vista, FL)
- Elizabethtown Sports Complex (Elizabethtown, KY)
- Grand Park (Westfield, IN)
- Great Park (Irvine, CA)
- Hoover Metplex (Hoover, AL)
- LakePoint Sports Complex (Cartersville, GA)
- Lindner Family Tennis Center (Mason, OH)
- Myrtle Beach Sports Center (Myrtle Beach, SC)
- National Sports Center (Blaine, MN)
- SPIRE Institute (Geneva, OH)
- Spooky Nook Sports Complex (Manheim, PA)
- Rocky Mount Events Center (Rocky Mount, NC)
- Virginia Beach Sports Center (Virginia Beach, VA)

3. Community Engagement – Through a focused development agenda, the new sports commission will have a great opportunity to significantly grow its connection to the community. Specifically, the CCVB can use this enhanced sports marketing initiative to galvanize area leaders on the value of sports tourism today, and its potential in the future given the right assets. Building these community “bridges” requires that the sports commission staff be intentional and externally facing while consistently engaging with these key community stakeholders. Richmond Region Tourism and the Louisville Sports Commission offer great examples on how to intentionally engage their local stakeholders on an ongoing basis. Similarly, the effective use of sports advisory boards can be a great tool to enhance sports tourism in a specific
4. Women’s Sports – Many of the most successful sports commissions in the country have become so by intentionally focusing their efforts even further towards specializing in a niche market (ex: certain sports, ages, genders). It is the belief of the Consultant team that the new sports commission has an opportunity to focus its attention to servicing women’s sports and events, specifically those in the youth and amateur space. By setting themselves apart as the leader of women’s sports in the region, Charleston would have an advantage over its competitors in attracting events in a market that data has show to be among the most valuable in the sports tourism industry, such as larger travel party sizes and direct spending. To achieve this, there will need to be an intentional effort put in place, not just by the sports commission, but by the area’s stakeholders and the community as a whole, that focuses on marketing, development, and servicing female participants during their entire visit.

Threats

1. **Regional Competition** – There are multiple competitors in Charleston’s geographic region that are well established in the national sports tourism space (see Appendix B). The level of established competition from nearby communities is only the beginning as there are also numerous communities throughout the Southeast/Mid Atlantic that are currently expanding their sports tourism efforts. This growing competition makes it more difficult each day for the CCVB to remain relevant locally, regionally, and nationally. While Charleston may not want to be “like” some of these communities, their presence in the sports tourism space will require the new sports commission to pick its proverbial spots and be intentional about what its focus areas become with the limited resources it has available to work with today.
2. **Funding** – Of the 6% bed tax collected in the City of Charleston, only 50% of that is allocated to the CCVB. Furthermore, that 6% is capped by legislation. Likewise, agreements and sponsorships with local partners can vary and may not be reliable year after year. In several respects, this puts Charleston behind its competitors regarding funding for basic tourism marketing and future facility development. There are several national best practices for funding sustainable programs. This is an area for deeper discussion with the community’s leaders that have an influence on potential funding sources to enrich sports tourism in the destination (example: what access to a Tourism Improvement District might also be available). It is important that the CCVB make the area’s elected officials aware of the value of sports tourism and what is at stake (in lost economic impact and tourism dollars) that could occur if investment isn’t made into marketing efforts and facility infrastructure, especially tournament friendly and/or anchor facilities oriented towards youth sports.
3. **Duplicity of Sports Tourism in the Area** – There is a lack of assertive clarity as to the role CCVB plays in Charleston and the surrounding area, how the organization can and should drive sports tourism and work in lockstep with the various sports entities and facilities. In most instances the facility owners or the local institution or league owner is often driving the process of booking sports tourism events, and/or attending industry conferences which are duplicative or executed without prior to knowledge of CCVB. This is especially true on the national level as some event rights holders are not sure or aware of the role(s) CCVB can play. This is likely due to two factors: (1) the local sports entities and facilities have been highly visible regionally in the sports tourism market whereas CCVB’s sports tourism efforts are relatively new, and (2) with CCVB not having a sports brand that is external facing within sports tourism market in some way. While the roles and missions of CCVB and other entities are somewhat clear to those on the inside of those organizations, they are not as clear to others. An effort should be made to define each organization’s role (or “lane”) and message that to stakeholders locally and nationally where necessary.

Charleston, WV Convention & Visitors Bureau
Sports Tourism Strategic Plan
Recommendations

The enclosed recommendations include three (3) primary recommendations for the creation of a sports and events brand “sports commission” and four (4) secondary concepts for an enhanced sports tourism program. The recommendations are listed in the following pages along with more detail on each concept.

Primary Recommendations

1. Create a Sports Brand – Sport event organizers prefer to work with experienced sports professionals that can help support their events. Destinations that lead with a “heads in beds” mentality are often bypassed during the selection process by these rights holders in favor of working with more event friendly CVBs/sports commissions. Beyond putting in place a dedicated and experienced sports professional (see below), the new sports and events commission needs to have its own brand separate from that of the CVB. National best practices for naming sports commissions point towards using a known destination point or a regional area. Examples of this would be Durham Sports Commission (a known destination nationally) or West Michigan Sports Commission (using a region where the actual city location may not be well known, in this case Grand Rapids). In the past, the term “Sports Commission” was generally reserved for those entities that were stand-alone, for-profit organizations; however, in recent years that term has been more loosely used among all organization structures (see Recommendation 3) focusing on sports and events tourism. Whatever name is used also needs to have a sports specific logo developed that is modern and simple to identify. The Denver Sports Commission and Hershey Harrisburg Sports and Events Authority are good examples of sports brands that are simple yet modern.
2. Develop Mission Statement, Objectives, and Goals – Any effective organization knows what success looks like in the near and long-term. The new and sports and events commission needs to develop a unified message that outlines the organization’s mission, objectives, and goals. When developing this messaging document, the new sports and events commission should consider the following best practices:
 - a. The best mission statements are simple and to the point.
 - b. The objectives that support the mission statement should be few in number and represent the key “pillars” of the organization.
 - c. There should be both short term and longer term goals.
 - d. Key stakeholders should be able to remember and regurgitate the organization’s mission and objectives.

Examples of this type of messaging can be seen on the following page.

Mission

The Sports & Events Commission enhances our community through sport (and we do so in three ways).

Objectives (or pillars)

- Bidding and hosting regional and national events.
- Recognizing sports achievement through our sports hall of fame.
- Support youth and amateur sports programs in our community.

Goals (Short Term)

- Drive \$20 million of economic impact to the destination annually through hosting events.
- Execute the annual hall of fame recognition event with a positive financial return.
- Provide access to sports camps for 100 underserved youth in our community each year.

Goals (Long Term)

- Drive \$20 million of economic impact to the destination annually through hosting events.
- Develop a permanent home for the hall of fame.
- Work with community partners to develop a pipeline for at risk youth to access sports programs throughout their entire childhood and teen years.

3. Determine Organization & Board Structure – Most sports tourism organizations fall into one of four (4) structure types: blended, stand-alone, dotted line, or government. A blended structure is where the sports effort is inside of a CVB or DMO. In this case the CVB/DMO funds the entirety of the sports marketing program and controls all the efforts of the organization. Stand-alone sports commissions are a wholly separate entity from the CVB/DMO and fund themselves through a myriad of sources such as donations, owned events/programs, sponsorships, and fundraisers. Dotted line organizations appear on the surface to be standalone entities; however, they are heavily governed by the local CVB/DMO. In this structure the CVB/DMO usually provides a large portion of the sports organization’s budget and/or staffing. Dotted line sports commissions can operate somewhat autonomously, however the CVB/DMO, and its mission are usually heavily tied to the organization’s success metrics. Lastly, government-based sports organizations are just that, based inside of a government agency such as a city or county. The main drawback to this model is lack of flexibility as governmental oversight, policies, and protocols can slow down the sports organization, especially when there is need for a swift response between the sports commission and an event owner.

Below are examples of the “Best in Class” sports tourism organizations that are similar to Charleston. Each destination’s Sports Tourism Index score is included in parentheses.

- Blended – Kalamazoo (38.80), Virginia’s Blue Ridge (49.74), Visit Lake Charles (50.78)
- Stand Alone – Spokane (60.49), Gainesville (46.22)
- Dotted Line – Durham (38.65)
- Government – Virginia Beach (63.17), College Station (40.81)

The goal of any organization is to build a board that is held in the highest regard in the community that it serves. The highest performing sports organizations in the country have created such a strong board that very few moves are made in the community without their consult, sports or otherwise. The end goal is to create an environment where the biggest decisions in the community happen at the sports commission's board room table. To achieve this, the following attributes should be considered when building out the new sports commission board:

- The board makeup should provide an environment for community leaders that touch sports tourism, events, economic development, and the business community to connect in one meaningful and intentional place.
- The board should consist of 10-15 members.
- Board members should be decision makers for their respective organizations.
- It is common in some instances that there is some form of an annual financial commitment from each board member.
- The board should be diverse in several areas, including, but not limited to the following: race, sex, age, skill sets, industry, background, and political connectivity.
- Board terms are normally for three years with the option to renew for a second tenure before terming out.
- Board members should serve on at least one committee.

It is the recommendation of the Consultant that the new sports commission be established as a “blended” organization within the current CCVB while also forming a sports specific board or advisory group following the above guidelines.

Secondary Recommendations

1. Dedicated Sports Staff – To stand out in the highly competitive sports tourism industry, the new sports and events commission must add headcount dedicated to lead the organization. The primary responsibilities of this position would include (1) business development, (2) serving as the “connective tissue” with community stakeholders, and (3) service events when they are held in the Charleston area. This person is usually at the director level. If a second dedicated sports position can be added in the future, it is most common that one staffer serves as the main business development arm and the other provides support services on game day (wears the “backpack”). This person is often at the manager or coordinator level. Data from the Sports Tourism Index™ shows that 74% of all the CVBs on the platform have a dedicated business development person and 56% have dedicated staff to service events (n=297 CVBs). As an alternative, many destinations who are not in position to add dedicated headcount at the current time have hired third party organizations to provide these services on a contract basis.

2. External Focus – Executing the recommendations in this report will take an intentional effort from the CCVB and the sports and events commission team (board and staff) to be externally focused with community stakeholders. This means an ongoing and consistent outreach program to the area’s venue owners/managers, high schools, colleges, elected officials, corporate entities, and hospitality community leaders. By focusing more time on the larger regional conversation relating to sports tourism, the new sports commission can connect the dots between various community partners and uncover more collaboration opportunities in the future. The Consultant Team recommends the implementation of an Advisory Board (best in class: Fort Worth Sport Commission) and the “Four Touch Rule” for all area stakeholders (tracking of four individual meetings or conversations per year with each stakeholder). To compete with destinations playing in the top realm of sports tourism and events, it is likely that post-pandemic the sports and events commission will need to add human capital (staff) that are dedicated to this area. The Louisville Sports Commission and Richmond Region Tourism are great examples of how to best serve as the “connective tissue” for collaboration opportunities throughout the community.
3. Regional Sports Tourism Master Plan for Facilities & Marketing – One common theme from our interviews and surveys was that the area’s stakeholders often weren’t aware of other projects going on in the area until they were already well underway. While the city, parks department, county, schools, facilities, and club programs all likely have a venue and/or marketing development plan in place, these departments tend to be very siloed and there is currently no unified game plan for the region. Pulling together the wants and needs of all area stakeholders to eliminate any redundancies in the future would be a valuable exercise for the CCVB and new sports and events commission to take on. The sports and events commission is the perfect entity to lead such a project and to generate community-wide momentum relating to placemaking through sports. This process would also likely lead to better regional alignment and participation from the various partners that may not be engaged today. It is the belief of the Consultant Team that this should be the first process undertaken before any additional facility developments are begun.
4. Sustainable Funding Mechanisms – In addition to the American Rescue Plan Act (ARPA) and other types of grants or gifts that may be available to spur program and facility investment, added long-term funding is often needed to support these various development/enhancement projects. Hotel tax, food & beverage taxes, sales tax, and in recent years, tourism improvement districts (TIDs) have become increasingly popular among DMOs and sports commissions over the past few years. TIDs are a customizable assessment on select businesses within the tourism industry. These funds are led and controlled by the district’s businesses, cannot be dipped into by the government, and must be used on approved tourism activities (bricks and mortar, bid fees, marketing, etc.). The most common type of TID is a 2% room night assessment which generates an average of \$2.4 million per year. In many cases, state enabling legislation is required before a TID can be implemented locally. Additional information on funding mechanisms can be found in the following section.

Charleston, WV Convention & Visitors Bureau
Sports Tourism Strategic Plan
Typical Funding Models

In order to enrich the destination as a desirable sports tourism market, the CCVB and its partners need to identify a sustainable funding source to enhance, develop, and maintain tourism driving assets. Numerous markets across the country have implemented a dedicated tourism-based revenue source (a tax) to enhance their sports commissions and sports facilities. These revenue streams commonly come in the form of a hotel occupancy tax, TID, or food and beverage tax that is dedicated to the singular purpose of increasing overnight stays through hosting sporting events. A sample list of destinations that have gone down these funding pathways can be found in Appendix C. Should such a tax, or another funding source be identified, the Consultant Team has outlined below how such a funding model could work for the sports commission.

- Sports Development Fund – Identifying a dedicated funding source to enrich Charleston’s sports program and venue inventory is critical for the sports and events commission and its partners to grow the community’s sports tourism impact into the future. The national best practice for the activation of these newly identified funds would be to use them as a catalyst for a “challenge grant” style program. That is, there would be a formal grant request process for partners to apply for funds in a dollar-for-dollar match for capital projects that would drive overnight stays to the Charleston area. For every dollar the partner invests, they would be eligible for a dollar from the commission’s sports development fund. Employing this type of a matching program ensures that all parties have a vested interest in the positive outcome of each project, and that the sports commission’s investments are well protected. In addition, effective use of these funds to drive more overnight stays would subsequently increase the impact of tax collections by these additional visitors. Finally, should this fund be put in place, the sports commission should tie all grants to the concept of “Favored Nation Status”.
- A major point of note, numerous cities are increasing their bed tax rate, using a food and beverage tax, and/or TIDs to put towards the funding of organizations or the construction and/or operation of new and enhanced sports facilities. In nearly all these cases, the taxes generated to enhance/build these programs are used to drive incremental overnight stays for the destination. The most common funding mechanisms the Consultant Team has seen implemented nationally include (in order):
 - Hotel/bed taxes
 - Tourism Improvement Districts (TIDs)
 - Prepared food (restaurant) taxes
 - Sales taxes
- Beyond these traditional funding mechanisms, the City of Charleston and many of the area’s corporate leaders have a vested interest in the sports market and how it can positively impact the area’s youth. A discussion with the area’s leaders should be had around what resources could be brought to the table for new sports facility and/or local program development.

Charleston, WV Convention & Visitors Bureau
Sports Tourism Strategic Plan
Conclusion

The most recent study by the Sports Tourism and Events Association – *State of the Industry Report 2021*, states that the participant driven portion of the domestic sports tourism sector is responsible for more than \$39.0 billion in direct spending as of the end of 2021 as compared to \$15.0 billion in 2019. Sports tourism is big business, and the competition has never been fiercer as there are more communities targeting the sports market than ever before. For Charleston to be relevant in this market, the CCVB, the new sports and events commission, and their stakeholders must continue to build bridges with key players locally to pave the way for more extensive partnerships over the long term.

The creation of a new sports and events commission and an improved venue mix will empower local event promoters and operators to build upon the area’s historical success of creating home-grown participant driven events, develop new event and venue products, and host more bid-in regional/national championships. To achieve these lofty aspirations, the new sports commission has a heavy lift ahead. By forging this path, the area will be better positioned regionally as a strong player in the sports tourism industry. In order to raise the bar in Charleston, and to continue to positively impact the community, the sports commission leadership should focus its efforts on three (3) overarching objectives:

1. Create a culture of sports and events development. Develop physical products (new venues). Develop new products (owned and operated events). Develop human capital (staff). Develop relationships (local event operators and regional/national event owners). And, finally, develop a vehicle to push the tourism agenda through sports (TID funding).
2. Partner with local promoters to build created events that will call the Charleston area home long into the future and that will not be subject to an RFP process with the new sports commission’s competitors. There is a major trend in the industry around the created events concept, inclusive of a focus on the regional drive market. These are things that the sports commission should work with its local event owners and venue managers to evolve in the future.
3. Make the improvement of the destination’s venue “tool kit” a priority by adding new venue assets and enhancing the existing assets where necessary. The top multi-sport facilities in the country have spurred private investment in and around them, which is something that needs to be top of mind for the leadership in the Charleston area throughout this process.

As with any new project, there are numerous variables that need to be considered when evaluating the ROI and risk in developing a new sports and events brand/commission. In the experience of the Consultant Team, destinations who consider the overall impact on their community and citizens, will have more success, and see a higher level of collaboration, than those that measure purely by room nights or bed tax collections.

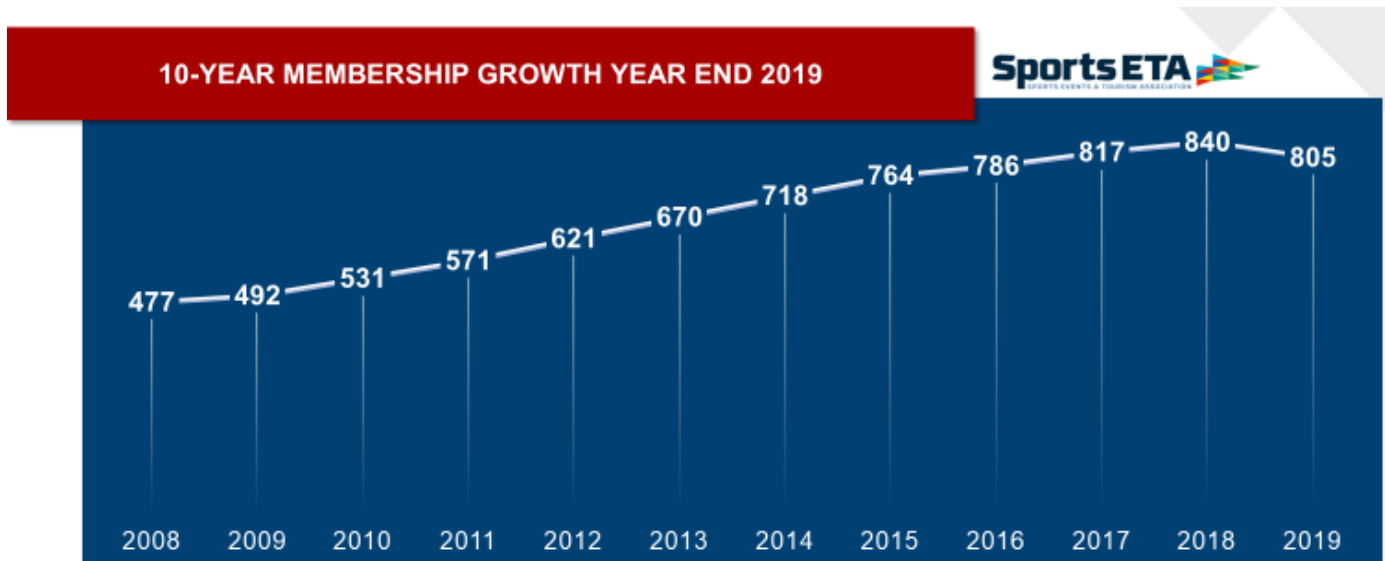
In the eyes of the Consultant Team, the puzzle pieces exist for the sports and events commission to expand economic development for the region through sports tourism. The Consultant Team believes it is within the power of the team at the CCVB and the sports commission to capture more opportunities in the sports tourism and events market while also enriching the lives of its citizens. This community-wide effort will help the sports commission connect the tourism and business communities in an ongoing and proactive manner into the future.

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Appendix A – SportsETA Membership

Prior to the COVID-19 pandemic, sports tourism has grown exponentially over the past two decades. The nature of the industry is that it is relatively “immune” to market factors such as troubled economies, war, high unemployment, 9/11, or similar factors. The most recent study by the Sports Tourism and Events Association – *State of the Industry Report 2021*, states that the participant driven portion of the domestic sports tourism sector is responsible for more than \$39.0 billion in direct spending as of the end of 2021 as compared to \$15.0 billion in 2019. This direct spending in the sports tourism sector generated a total economic impact of \$91.8 billion in the local economy, driving over 635,000 jobs and \$12.9 billion in taxes. There are more events today, with more participants competing in those events, than ever before.

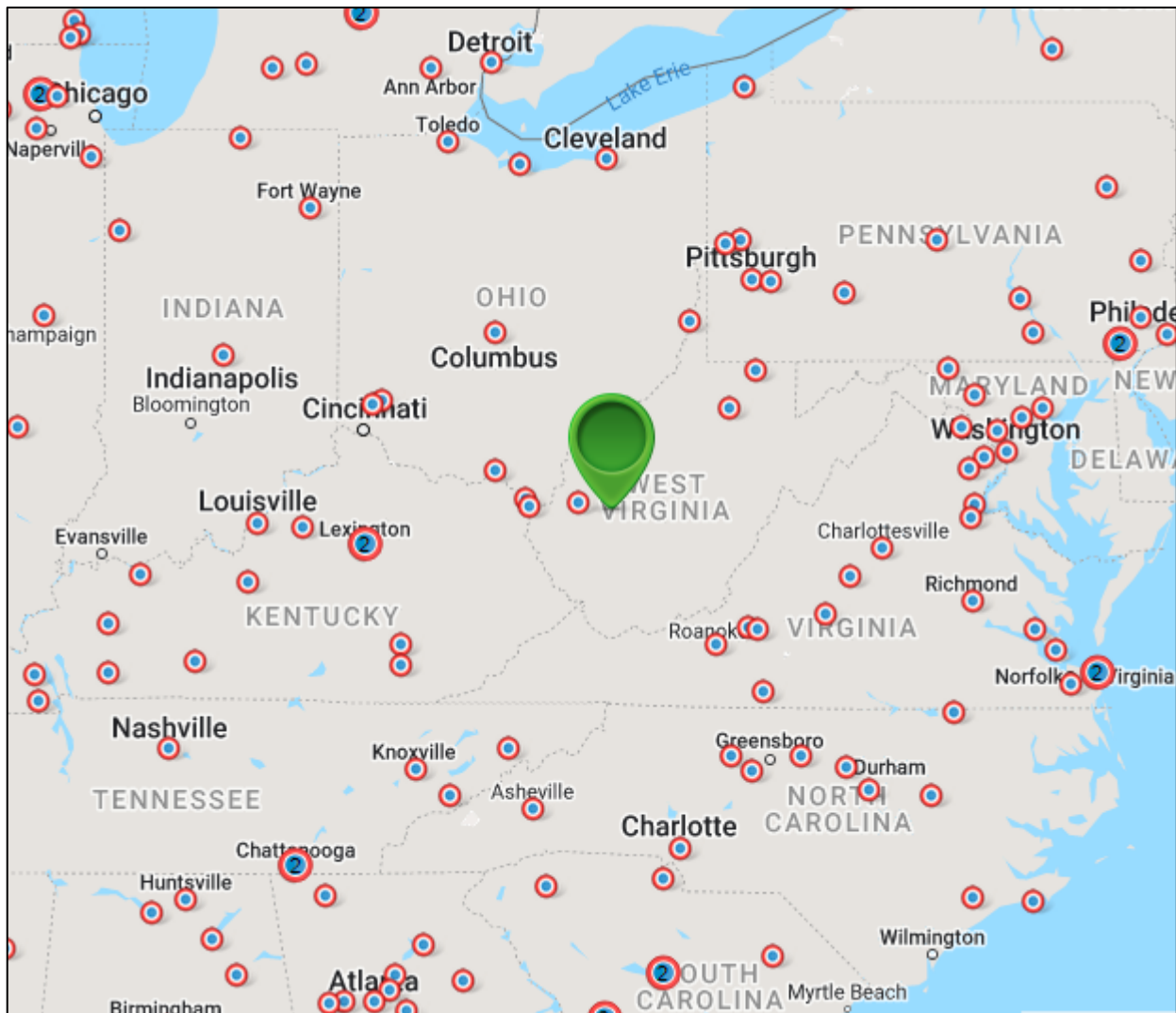
Projections indicate that the grass roots sports tourism industry (exclusive of mega events like the Superbowl, Final Fours, etc.) is growing at a pace of 12-14% per year, with more growth anticipated in the coming decade. Below is a chart outlining the growth of membership organizations within SportsETA, which is a direct correlation to the growth of the sports tourism industry as a whole.



Appendix B – Charleston, WV Convention & Visitors Bureau

The sports tourism and events industry is as competitive today as it has ever been. Numerous destinations market themselves in this niche industry in the form of a sports commission, DMO, convention & visitors bureau, city, or through an alternative organization.

Below is a visual representation of the various entities in the CCVB’s geographic region that are active in the sports tourism and events space. Tournaments often attract teams from as far away as a full day’s drive. This graphic shows the significant level of competition in this industry and the high-level geographic overlap amongst these communities.



Appendix C – Trends in Sports Facility Funding

The most common funding source for new facilities is a general fund allocation from the city/county where the facility is located as well as a land contribution for the venue to be constructed (again donated by the city or county). Although the level of success is yet to be determined, several communities around the country have already, or are in the process of, raising their bed tax collection rate to fund sports-related facility development, including:

- Rockford (IL) having already finished a significant expansion of its outdoor sports venues, used bed tax dollars to bond \$10 million towards a new indoor facility. The Downtown Sports Complex carried a price tag of \$24 million and opened in late 2016.
- Evansville (IN) opened a \$15 million multi-use outdoor sports complex that is entirely funded by bed tax dollars. The future management of this facility will also be funded by bed tax dollars, and it is run by the DMO itself.
- Spokane (WA) bonded \$25 million against future bed tax collections to construct a new athletic field house (The Podium) which opened in December 2021.
- Shreveport (LA) passed a bed tax increase for the expansion of their Convention & Visitor Bureau's national marketing program. This new tax also supports the Independence Bowl (venue enhancements and improved matchups) and the Shreveport Regional Airport (incentives for new airline routes). This combined effort between three of Shreveport's leading agencies shows the economic development impact that sports tourism can have on a mid- or small-size market.
- Fox Cities (Appleton, WI) raised their bed tax rate from 6% to 10% to build a convention center, a new large (hardwood and ice) indoor sports complex, and to renovate three existing sports facilities used to attract regional and national tournaments. The new facility opened in October of 2019 and due to its early success, further expansions are already being discussed.
- Placer Valley (CA) allocated funds from an increased bed tax to develop and open a new indoor hardwood complex in 2018.
- Pasco (FL), in partnership with the Florida Sports Foundation, developed a new sports complex on 120 acres of county-owned property. Pasco County is investing \$11 million to the project, including \$8.5 million in tourist tax funds and \$2.5 million in unrestricted bond proceeds.
- In January 2016, Warren County (OH) raised the lodging tax one (1) percent to finance a \$10 million, 20 field sports complex. The rate hike increased the county hotel occupancy tax from 3% to 4%. The tax will be used over 20 years to pay off debt the Warren County Convention & Visitors Bureau will take on to pay for the complex.

Appendix C – Trends in Sports Facility Funding (Cont.)

In addition to the hotel tax examples noted on the previous page, several communities have implemented a food and beverage tax for the purpose of developing or enhancing sports facilities.

- Elizabethtown (KY) passed a 2% food and beverage tax in 2012 to fund the development and management of the Elizabethtown Sports Park. In the first five years of operations, the “mega complex” generated nearly \$100 million in direct visitor spending to the community (according to studies commissioned with SportsImpacts, one of the top economic impact agencies in the country). Etown as it is known, is currently looking at facility expansion opportunities to capture even more sports tourism activity.
- For the past 30 years, Fort Wayne (IN) has implemented a 1% food and beverage tax that is used for capital projects. This program has funded several new buildings at the site of the Allen County War Memorial Coliseum arena, including a 100,000-square foot expo center and 5,000-seat baseball stadium. These funds have also been used to renovate the arena’s ice floor, to add 2,500 seats and meeting rooms to the arena. The fund generates \$7.5 million per year and is currently being considered to help finance a new arena downtown.
- Ashland (OR) employs a 5% food and beverage tax which garners nearly \$4.5 million a year. Twenty percent of these funds are allocated to the acquisition and preservation of open spaces for parks and recreation, with 80% of the funds used to retire debt for a recently completed community-wide waterway enhancement.
- Historically, King County (WA) has used intermittent funding from food and beverage taxes to build stadiums such as the King Dome. While this program is not active today, it has been a tool the Greater Seattle area has used in the past for venue development to entice professional sports teams to the area. Similarly, the State of Florida has a professional league stadium venue development program that is also funded by temporary food and beverage taxes, when needed. Finally, Milwaukee used a food and beverage tax to build Miller Park, home of Major League Baseball’s Milwaukee Brewers.
- In 2007, the State of New Jersey created the “Sports and Entertainment District Urban Revitalization Act.” Under this legislation, the community of Millville levied a 2% local food and beverage tax to fund a sports and entertainment district including a 500-acre motorsports park that hosts numerous events including NASCAR racing.

It should be noted that different states have different regulations regarding the use of funds generated by bed and/or food and beverage taxes. The cases outlined above are not exhaustive and should be viewed only as examples for further discussion.

Appendix D – Charleston, WV Convention & Visitors Bureau

Overall, the Consultant Team found a fair amount of “Tournament Friendly” and “Anchor” spectator facilities within Charleston, yet very few were in the participant category. Below is a list of all venues evaluated by the Consultant Team. Using the Sports Tourism Index[®], the Consultant Team rated each facility on a scale of 1 to 5 (with 5 being superior) and its current quality (CQ). The Consultant Team also predicted what the potential future quality (PQ) likely could be if upgrades were made to each venue. (DNV indicates the Consultant Team did not visit the facility during its site tours.) The rating system used the following color codes:

Anchor Facility
Tournament Friendly
Not of Tournament Quality

Facility Name	Facility Type	National Average	Index Score & CQ	PQ
Appalachian Power Park	Baseball Stadium	2.50	3.40	
Calvin L. Bailey Field	Baseball Stadium	2.50	1.45	
Charleston Coliseum	Arena	2.83	4.15	
Charleston Coliseum & Convention Center	Convention Center	2.21	3.65	
Charleston Coliseum & Convention Center - Indoor Courts	Indoor Courts (Basketball/Volleyball)	2.80	4.05	
Charleston Coliseum & Convention Center - Pickleball Courts	Pickleball Courts	2.39	4.00	
Charleston Coliseum & Convention Center - Theater	Theater	2.79	3.10	
Charleston Municipal Auditorium	Theater	2.79	2.85	
Coonskin Golf Course	Golf Course	3.54	1.50	
Coonskin Park Disc Golf Course	Disc Golf Course	3.44	2.95	
Lady Jackets Field	Softball Stadium	2.17	1.45	
Lakin-Ray Field at West Virginia State University	Football Stadium	2.50	1.75	
Schoenbaum Soccer Stadium	Soccer Stadium	3.36	2.30	
Shawnee Sports Complex - Diamonds	Diamonds	2.28	2.50	
Shawnee Sports Complex - Flat Fields	Flat Fields	2.34	3.05	
University of Charleston Laidley Field	Football Stadium	2.50	2.35	
University of Charleston Laidley Field - Track	Outdoor Track	3.15	4.15	
University of Charleston Wehrle Arena	Indoor Courts (Basketball/Volleyball)	2.80	3.30	
Walker Convocation Center at West Virginia State University	Arena	2.83	2.95	

Appendix D (Cont'd) – Charleston, WV Convention & Visitors Bureau

Appalachian Power Park
Very nice minor league baseball stadium. Seats 4500 Downtown. Parking Garage nearby.
Calvin L. Bailey Field
Stand-alone baseball field. Recently turfed.
Charleston Coliseum & Convention Center
Very nice and flexible Convention Center. Attached 13,500-seat arena. 50,000 sf convention space with air walls + ballroom. 770-seat theater. Operated by Oak View Group
Coonskin Park
Par 3 Golf Course. Disc Golf Course. 1 turf flat field with lights. Seats 3,000. Amphitheater
Lady Jackets Field at West Virginia State University
Stand-alone softball field. Recently turfed outfield.
Lakin-Ray Field at West Virginia State University
Newly turfed football stadium. Seats 5,000 State-of-the-art lighting system. Newer locker rooms. No track. Limited on-site parking.
Shawnee Sports Complex
6 full-size turf flat fields. All Lit. 2 with larger sets of bleachers. 4 diamond clover. All with turf infields. 1 is full turf. All lit. Additional space for added grass fields. Very nice complex
University of Charleston Laidley Field
Older stadium right downtown. Has turf, but turf not in the best shape. Nice track. Plenty of seating. Hosts HS track state championships. Done some USATF events. Good potential.
University of Charleston Wehrle Arena
3400-seat theater right downtown. Managed by Oak View Group. Could not go inside during site visit due to event later that night.
Walker Convocation Center at West Virginia State University
Small arena. Home to WVSU M&W basketball, volleyball. Nice. Fairly new. 1300+ seats. Locker rooms Was hosting a small boys high school basketball tournament during our visit.

Appendix E – Charleston, WV Convention & Visitors Bureau Sports Tourism Index™ Results

Charleston CVB

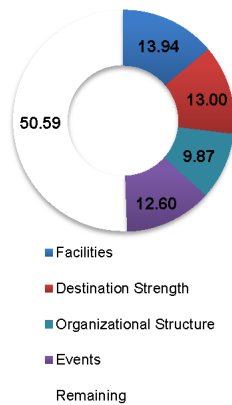


FINAL SCORE
49.41

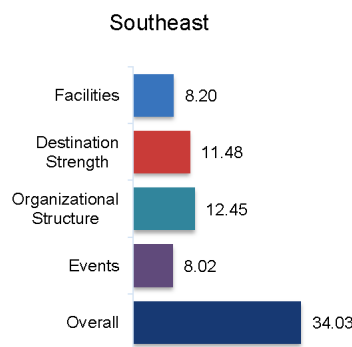
SPORTS TOURISM INDEX REPORT

Market Size: Under 500k
Organization Type: DMO (CVB/Sports Commission)
Geographic Region: Southeast
Sports Budget: 90,001-100,000

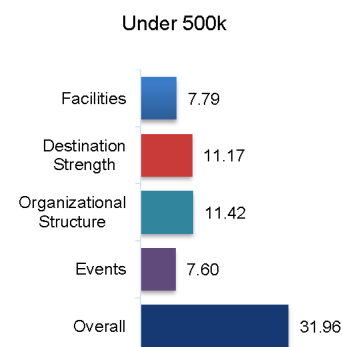
SCORE BREAKDOWN



AVERAGE SCORES



AVERAGE SCORES



RECOMMENDATIONS

Facilities

Your destination likely has an average inventory of participant focused facilities with some meeting the standards necessary to host local and regional events and a moderately effective supply of spectator focused venues. Future focus should be on working with community leaders to enhance your venue "tool kit" and to develop new facilities in concert with your local stakeholders such as parks and recreation, cities, counties, and academic institutions.

Destination Strength

Your destination is geographically accessible and offers a strong inventory of amenities and attractions that enhance the visitor experience. Future focus should be dedicated to "storytelling" about the positive attributes of the destination to strengthen demand for future visitation. Facilitation of high level discussions around destination development is important to maintain long-term success.

Organizational Structure

Your organization has limited staff and budget dedicated to the sports market. It is most often the case at this level that the staff member responsible for sports also has other sales verticals which can hinder their ability to consistently build relationships in the sports market. Community wide support for organizations at this level is often a significant challenge. This would commonly include elected officials and corporate leaders in the community.

Events

Your organization hosts an average number of bid-in events, may create and/or owns a handful of its own championships, and services some events at a basic level. Organizations that score well in this area likely have the ability to work with their local promoters to create new tourism driving events and/or grow their current properties year over year. There is likely an opportunity for organizations in this category to enhance their efforts in servicing events in order to strengthen renewal rates in the future.



Appendix E – Charleston, WV Convention & Visitors Bureau Sports Tourism Index™ Results (Cont'd)

Charleston CVB

INDUSTRY AVERAGES REPORT



Overall Scores [▲]

	Your Score	Average Score	Difference
Facilities	13.94	8.33	5.61
Destination Strength	13.00	12.13	0.87
Organizational Structure	9.87	11.87	-2.00
Events	12.60	7.81	4.79
Overall	49.41	34.48	14.93

Facilities Breakdown*

Participant-Based	Your Score	Average Score	Difference
Outdoor Track	4.15	3.16	0.99
Indoor Courts (Basketball/Volley)	4.05	2.79	1.26
Pickleball Courts	4.00	2.39	1.61
Flat Fields	3.05	2.35	0.70
Diamonds	2.50	2.29	0.21
Convention Center	3.65	2.24	1.41

Spectator-Based	Your Score	Average Score	Difference
Arena	4.15	2.83	1.32
Baseball Stadium	3.40	2.51	0.89
Theater	3.10	2.72	0.38
Arena	2.95	2.83	0.12
Football Stadium	2.35	2.48	-0.13

Destination Strength

	Your Score	Average Score	Difference
Tourism Drivers [▲]	6	3.14	2.86
Hotels [*]	1.20	1.15	0.05
Destination Accessibility [*]	2.85	2.16	0.69

Organizational Structure*

	Your Score	Average Score	Difference
Sports Staff	0.00	2.13	-2.13
Grant Program	2.00	2.09	-0.09
Board & Advisory	0.00	0.56	-0.56

Sporting Events

Number on an annual basis	Your Answer	Average Answer	Difference
Local Events	10	25	-15
Bid-In Events Hosted	5	8	-3
Events Serviced	15	29	-14

* Max score of 5

[▲] Max score of 10

^{*} Max score of 25

Appendix F – Charleston, WV Convention & Visitors Bureau Sports Tourism Market – 5-Year Strategic Mission Pillars

In the future, the enhanced sports tourism effort should sharpen its focus on three (3) key mission areas, or “Pillars.” Each Pillar is driven by a different audience, all focused on increasing overnight stays and consumer spending in the Charleston area. This refined focus will help the sports commission enhance its messaging and will deliver directly on the organization’s tourism mission, as well as positively impact the community’s sports groups. The recommended Pillars are below along with their driving audiences/factors.

Charleston, WV Convention & Visitors Bureau Sports Commission Development 5-Year Strategic Mission Pillars			
Pillar	Enhanced Structure Events: Bid/Created/Owned (Short-Term)	Venue Enhancement (Long-Term)	Community Engagement (Ongoing)
Audience	Tourism Economic Development Rights Holders/NGBs Local Promoters High Schools/Colleges	Venue Managers Hospitality Leaders Elected Officials Economic Development Parks and Rec/Colleges Cities/Counties	Elected Officials C-Level Community Leaders Local Media Non-Profit Civic Groups Hospitality Community
Tactics	Strengthen Organization Grow Existing Events Create/Incubate New Events Continue Bid-In Events	Venue Needs Master Plan Venue Development Fund Funding Source(s) Defined Develop Facilities Field Trip	Staff = Outwardly Focused “6&6” Lunches “4 Touch” Program Advisory Board Assign Board to Electeds Economic Impact Releases