MEMORANDUM

April 14, 2025

To: Councilmember Natalie Fani-Gonzalez

Councilmember Will Jawando

From: Keith Miller, Chair, Sports Tourism Task Force

Subject: Report on Sports Tourism Task Force Activities and Funding Request

I am pleased to present the attached report from the Sports Tourism Task Force. As outlined in Resolution 20-547, our Task Force was charged with conducting a comprehensive facility needs assessment to explore the potential for enhancing sports tourism in Montgomery County. Although we were unable to secure funding for the full assessment, we have made remarkable progress with the support of students from Montgomery College. Together, we compiled a report that examines regional sports data, GIS information regarding land availability, and the results from a survey of sports event organizers.

Our meetings and discussions, along with the attached report, confirm the need for additional sports facilities in the region. We believe there is a significant opportunity for the county to develop a new facility, which would bring numerous benefits, including increased tourism, job growth, incremental tax revenues, and an improved quality of life. Additionally, a well-designed facility would enhance the county's image, attracting businesses and organizations to the area. In summary, we are confident that building the right facility will benefit the users and community and should be part of a larger economic plan to diversify our economy and make Montgomery County a thriving place to live, work, and recreate.

To ensure the success of this initiative, the Task Force recommends proceeding with a comprehensive feasibility study of the sports landscape. In order to develop a facility that realizes its full potential, we need to hire experts in the sports industry to conduct research and other data to provide to the Task Force so that we can provide informed recommendations as requested in our governing resolution. Recognizing the significant funding this project envisions, as well as the opportunity cost of not doing other things, it is essential to invest, at this time, in appropriate resources for critical economic modeling and scenario comparison.

Therefore, to continue our work, we are providing the following two funding options. The Task Force recommends proceeding with the more extensive study outlined in option one.

This study will consider all types of facilities and include a more comprehensive look at the region's needs.

1. Comprehensive Study of the Sports Landscape: This is the recommended option, which would focus on the region's needs and consider all types of facilities currently operating and being planned. Considering the estimated $200,000 cost of this type of study, we further recommend working with the Maryland Stadium Authority (MSA) and pursuing a 50/50 expense share. If successful, the MSA will share in the cost and limit the expense to $100,000 to the county. We will need the Council's support in the request to secure a match of expenses.

The MSA has a proven track record of providing research and development concepts for successful facilities, including the Montgomery County Conference Center, which has been a tremendous success for the county. Additionally, the MSA has conducted numerous studies throughout the state for various facilities.

The first phase of this work will include an overall assessment of the types of facilities best suited for Montgomery County. The Task Force would then provide the council with a report containing recommendations on which type of facility to pursue. Phase two would include the base development plan for a facility.

2. **Feasibility Assessment for Multi-Sport Indoor Facility**: This option is for a feasibility study specifically for a multi-sport indoor facility. The Task Force estimates that funding of up to $75,000 will be necessary to hire a third-party consultant to conduct the feasibility assessment.

The Task Force will work with the consultant to identify key metrics for analysis that will yield more definitive information about the development of this type of facility. The results will provide essential information needed for the Task Force to complete its work and make recommendations regarding the development of this type of facility.

After the type of facility is determined, the Task Force can present recommendations on legislation, regulations, policies, and procedures to the Council. This information will also allow us to finalize workforce development and marketing recommendations.

Without funding for either of the above options, the Task Force will be unable to complete the requested work. The funding for one of these recommendations will require additional time beyond the timeline outlined in Resolution 20-547. We commit to working diligently to complete the assigned tasks.

Thank you for considering these options. We look forward to your support in advancing sports tourism in Montgomery County.

Montgomery County Sports Tourism Task Force Report: Executive Summary

Project Overview

Montgomery County has experienced great demand for its world-class sports facilities from residents and outside groups alike, generating significant economic, community development, and health benefits. To capitalize on this demand, the County sought to identify opportunities to enhance the number of youth, amateur, and semi-professional sports tournaments and build upon the economic impact of these activities.

The Montgomery County Council created the Sports Tourism Task Force through Resolution 20-547 on June 18, 2024. This initiative was spearheaded by the joint Economic Development (ECON) and Education and Culture (EC) Committee to explore ways to promote sports tourism and increase capacity and access to sports facilities for County residents.

The Task Force was unable to secure funding to conduct a facility needs assessment, but it is grateful to Montgomery College and interns from business-related degree programs for their support in creating this report.

Research Approach

The Task Force convened monthly meetings starting September 11, 2024, with sessions occurring on the second Wednesday of each month for eight consecutive months. The Task Force members reviewed data and provided guidance to the interns. The interns were divided into two teams, with one team focused on reviewing and summarizing data and the second team developing and analyzing a study of event organizers.

In addition to the review of national, regional, and local data, the interns developed a comprehensive survey distributed to sports event organizers both within and outside Montgomery County. This survey collected critical data on:

Types of events organized:

- Youth, amateur adult, college, professional, and multi-sport tournaments
- Wide variety of sports, including softball, soccer, volleyball, field hockey, ice hockey, and emerging sports

Facility requirements:

- Preferred venue types (e.g., outdoor fields, indoor courts, turf, ice rinks)
- Desired amenities (e.g., WiFi, concessions, lights, medical space, event HQ space)

Key factors in location selection:

- Venue quality and amenities
- Cost of hosting (permits, rentals, accommodations)
- Transportation and accessibility
- Availability of accommodation
- Community engagement

Cost perceptions:

- How Maryland compares to other states in terms of affordability
- Interest in financial incentives such as:
  - Grants for organizers
  - Reduced permit/rental fees
  - Sponsorship or revenue-sharing opportunities

Montgomery County feedback:

- Strengths: Location near major cities, SoccerPlex, ease of access
- Weaknesses: Limited facilities, high costs, lack of mini-complexes
- Suggestions: Build new multi-field complexes, offer more support, improve affordability

Sports tourism trends & support needs:

- Growth in emerging sports
- Increasing demand for live streaming and digital amenities
- Strong desire for government/DMO/CVB partnership and marketing assistance
- Non-monetary support suggestions

The survey results were methodically analyzed to identify key trends, preferences, and requirements that informed our facility recommendations. This data-driven approach allowed us to quantify the specific needs of the sports tourism market and develop evidence-based proposals for facility development that align with actual market demand.

This report presents our findings, analysis, and recommendations based on extensive data collection, survey results, and examination of methods implemented by neighboring counties. The results validate the need for a more detailed study to review specific facilities' needs that would maximize

Montgomery County's potential as a sports tourism destination while ensuring these initiatives benefit our local residents and businesses.

Summary of Findings

Team 1 Data Analysis

1) Post-Pandemic Sports Participation: Key Insights

The SFIA 2022 Topline Participation Report reveals encouraging signs of recovery in sports participation following the COVID-19 pandemic.

SPORTS PARTICIPATION TRENDS UPDATE

In recent years, sports participation trends were materially impacted due to the environment created by the COVID-19 pandemic. Data used to analyze recent participation trends was obtained by the Sports & Fitness Industry Association (SFIA), a leading trade association focused on advocacy, thought leadership, and research. The SFIA 2022 Topline Participation Report study results are based on completed surveys and interviews with 18,000 individuals who are ages 6 and older. Responses were weighted by SFIA to balance the data and ensure it to be reflective of the U.S. population with consideration given to multiple demographic variables.

Overall sports participation, in terms of both number of participants and participation rate, increased measurably from 2019 to 2021, as shown in the table below.

Overall Sports Participation in the U.S. - Population Aged 6+					
Category	2019	2020	2021	1-YR Change	2-YR Change
Number of Participants (Millions)	221.6 M	229.7 M	232.6 M	1.3%	5.0%
Participation Rate	73.2%	75.6%	76.3%	0.9%	4.2%

Source: SFIA Topline Participation Report 2022.

The SFIA 2022 Topline Participation Report data highlights a notable rebound in sports participation following the COVID-19 pandemic. Between 2019 and 2021, the number of participants aged six and older increased from 221.6 million to 232.6 million, representing a 5.0% growth over two years. The participation rate also showed an upward trend, rising from **73.2%** in **2019 to 76.3% in 2021**, reflecting a **4.2% increase**.

This suggests that participation levels have recovered while the pandemic initially disrupted sports engagement. The steady annual growth thereby indicates a return to pre-pandemic engagement levels, though long-term trends will depend on factors like accessibility, interest in recreational activities (sports to be determined), and potentially societal shifts in fitness habits.

U.S. Participation in Select Team Sports - Population Aged 6+ (in millions)											
Sport	2019	2020	2021	1-YR Change	2-YR Change	Sport	2019	2020	2021	1-YR Change	2-YR Change
Baseball (Total)	15.804	15.731	15.587	-0.9%	-1.4%	Lacrosse (Total)	2.115	1.884	1.892	0.4%	-10.5%
Baseball (Casual) 1 - 12 Times	6.655	8.089	7.392	-8.6%	11.1%	*Lacrosse (Casual) 1 - 12 Times*	1.021	0.902	1.009	11.9%	-1.2%
Baseball (Core) 13+ Times	9.149	7.643	8.195	7.2%	-10.4%	*Lacrosse (Core) 13+ Times*	1.094	0.982	0.883	-10.1%	-19.3%
Basketball (Total)	24.917	27.753	27.135	-2.2%	8.9%	Soccer (Indoor - Total)	5.336	5.440	5.408	-0.6%	1.3%
Basketball (Casual) 1 - 12 Times	9.669	11.962	11.019	-7.9%	14.0%	*Soccer (Indoor - Casual) 1 - 12 Times*	2.581	3.377	3.054	-9.6%	18.3%
Basketball (Core) 13+ Times	15.248	15.791	16.116	2.1%	5.7%	*Soccer (Indoor - Core) 13+ Times*	2.755	2.063	2.354	14.1%	-14.6%
Cheerleading (Total)	3.752	3.308	3.465	4.7%	-7.6%	Soccer (Outdoor - Total)	11.913	12.444	12.556	0.9%	5.4%
Cheerleading (Casual) 1 - 25 Times	1.934	1.931	2.030	5.1%	5.0%	*Soccer (Outdoor - Casual) 1 - 25 Times*	6.864	8.360	7.586	-9.3%	10.5%
26+ Times	1.817	1.377	1.435	4.2%	-21.0%	*Soccer (Outdoor - Core) 26+ Times*	5.050	4.084	4.970	21.7%	-1.6%
Football (Flag - Total)	6.783	7.001	6.889	-1.6%	1.6%	Softball (Fast-Pitch - Total)	2.242	1.811	2.088	15.3%	-6.9%
Football (Flag - Casual) 1 - 12 Times	3.794	4.287	4.137	-3.5%	9.0%	*Softball (Fast-Pitch - Casual) 1 -25 Times*	0.993	0.650	0.934	43.7%	-5.9%
Football (Flag - Core) 13+ Times	2.989	2.714	2.752	1.4%	-7.9%	*Softball (Fast-Pitch - Core) 26+ Times*	1.250	1.162	1.154	-0.7%	-7.7%
Football (Tackle - Total)	5.107	5.054	5.228	3.4%	2.4%	Softball (Slow-Pitch - Total)	7.071	6.349	6.008	-5.4%	-15.0%
Football (Tackle - Casual) 1 - 25 Times	2.413	2.390	2.642	10.5%	9.5%	*Softball (Slow-Pitch - Casual) 1 - 12 Times*	3.023	2.753	2.729	-0.9%	-9.7%
Football (Tackle - Core) 26+ Times	2.694	2.665	2.586	-3.0%	-4.0%	*Softball (Slow-Pitch - Core) 13+ Times*	4.048	3.596	3.279	-8.8%	-19.0%
Football (Touch - Total)	5.171	4.846	4.884	0.8%	-5.6%	Volleyball (Court - Total) 1 - 12 Times	6.487	5.410	5.849	8.1%	-9.8%
Football (Touch - Casual) 1 - 12 Times	3.065	2.990	3.171	6.1%	3.5%	*Volleyball (Court - Casual) 13+ Times*	2.962	2.204	2.465	11.8%	-16.8%
Football (Touch - Core) 13+ Times	2.105	1.856	1.713	-7.7%	-18.6%	*Volleyball (Court - Core)*	3.525	3.206	3.384	5.6%	-4.0%
Gymnastics (Total)	4.699	3.848	4.268	10.9%	-9.2%	Wrestling (Total)	1.944	1.931	1.937	0.3%	-0.4%
Gymnastics (Casual) 1 - 49 Times	3.004	2.438	2.787	14.3%	-7.2%	*Wrestling (Casual) 1 - 25 Times*	1.189	1.239	1.290	4.1%	8.5%
Gymnastics (Core) 50+ Times	1.695	1.410	1.482	5.1%	-12.6%	*Wrestling (Core) 26+ Times*	0.755	0.692	0.647	-6.5%	-14.3%

Source: SFIA Topline Participation Report 2022.

The SFIA Topline Participation Report 2022 data provides insights into U.S. participation trends in various team sports between 2019 and 2021. An important key trend to note is the significant growth in particular sports:

Overall Growth in Some Sports:

- **Basketball** saw an overall increase (+8.9% over two years), specifically in casual participation (+9.7%), suggesting that more people engage recreationally in the sport.
- **Softball (Fast-Pitch)** had significant growth (+15.3% in 1 year and +31.8% in 2 years), showing a strong post-pandemic recovery.
- **Soccer (Indoor)** also saw an increase (+13% over two years), indicating growing interest in indoor alternatives.

Declining Participation in Some Sports:

- **Baseball (Total)** showed a slight decline (-1.4% over two years), with **casual participation** dropping (-8.6%), possibly indicating lower recreational interest.
- **Football (Tackle - Core)** declined (-7.9% over two years), reinforcing the decreasing tackle football participation trend, likely due to safety concerns.
- **Wrestling (Core & Casual)** experienced declines (-14.3 % and -6.5 %), possibly due to pandemic-related restrictions and lower engagement post-COVID.

Mixed Trends in Certain Categories:

- **Gymnastics** had a mixed trend, with total participation slightly increasing (+2%) while frequent participation (50+ times per year) declined (-12.6%), possibly indicating lower long-term commitment.
- **Flag Football (Casual 1-12 Times)** increased (+9.4%), while more committed participation declined (-2.5%), suggesting a shift toward casual play.

2) Multi-purpose Facility.

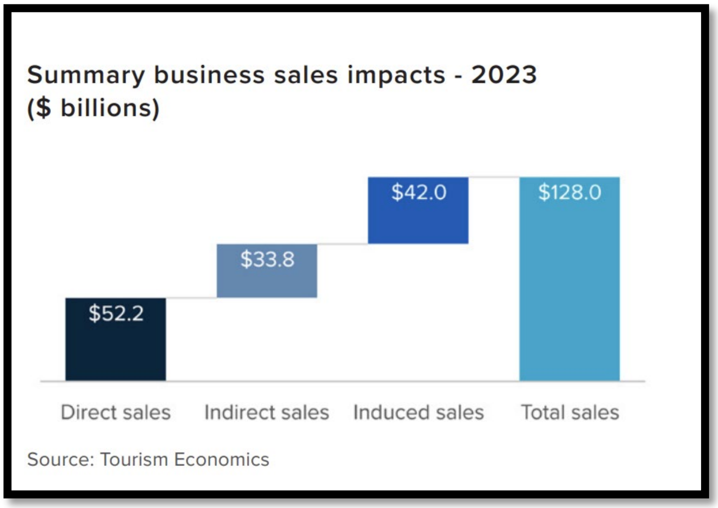
A multi-purpose facility can be an ideal solution as it allows us to address a broad range of needs by accommodating multiple sports. An indoor multi-purpose venue will provide space for basketball, futsal, pickleball, martial arts, and volleyball, the facility will not only increase usage but also meet the growing demand for these sports. This presents a valuable opportunity for the county to support the expansion of these activities. Additionally, the facility's ability to host graduation ceremonies offers significant economic benefits, especially considering the county's lack of a major graduation venue. This addition will contribute positively to the local economy by attracting new special events and boosting community engagement. Additional research is necessary to fully determine the feasibility of this type of facility.

3) Sports Tourism's National Impact

According to the 2023 SOTI Report, the sports tourism sector is a significant economic force in the American economy. Notably, it outperforms many industries in direct employment, demonstrating its crucial role in the national economy.

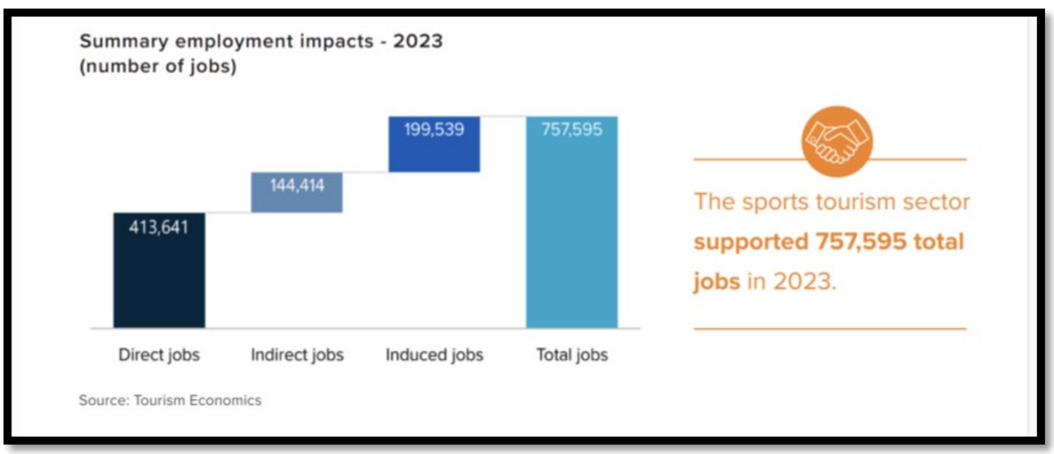
Sports tourism drives prosperity in communities across the country, including in areas like Montgomery County, where youth and amateur sports play a particularly vital role. The data that follows highlights the sector's contributions to the national economy through direct spending, employment, personal income, and tax revenue.

Source: 2023 SOTI (State of the Industry) Report



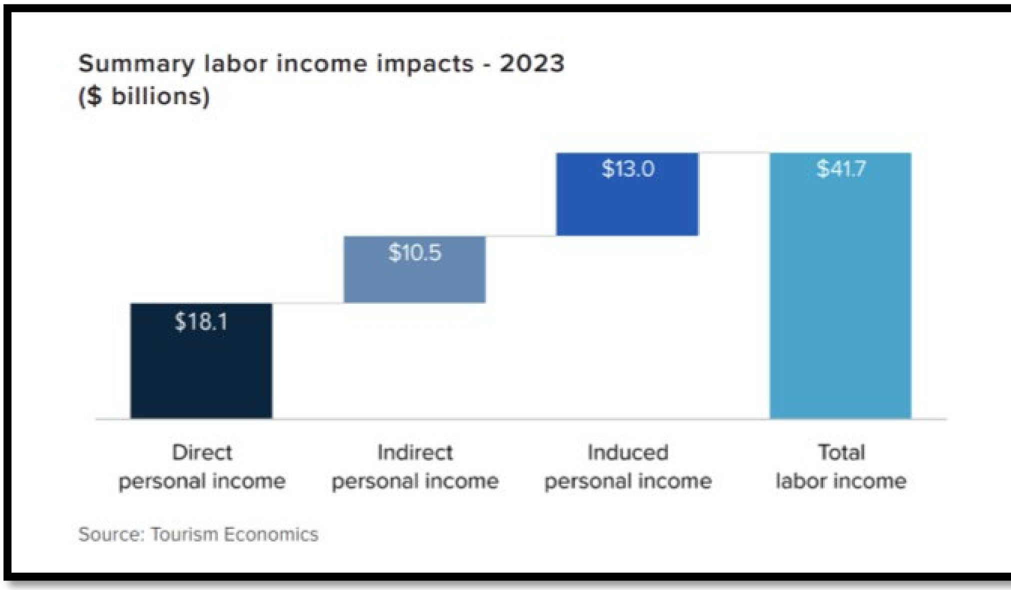
The $52.2 billion in direct spending in the sports tourism sector generated $33.8 billion in indirect expenditures and $42.0 billion in induced expenditures, resulting in a total economic impact of $128.0 billion.

Employment Impacts



- The sports tourism sector supported 757,595 total jobs in 2023.
- The sports tourism sector supported 757,595 full-time and part-time jobs in 2023, which includes 144,414 indirect jobs and 199,539 induced jobs.

Labor Income Impacts



- The sports tourism sector generated $41.7 billion in total personal income in 2023.
- The sports tourism sector generated $18.1 billion in direct income and $41.7 billion in total income, including indirect and induced income in 2023.

Fiscal (Tax) Impacts

- The sports tourism sector generated $20.1 billion in government tax revenue in 2023.
- The sports tourism sector generated a total fiscal (tax) impact of $20.1 billion in 2023.
- State governments collected $5.0 billion and local governments collected $4.8 billion in 2023.

State and local tax revenue – 2023
($ millions)

	State	Local	Total
Total taxes	**$4,982**	**$4,801**	**$9,783**
Sales	$2,984	$693	$3,676
Bed Tax	$0	$875	$875
Personal Income	$962	$85	$1,047
Corporate	$382	$27	$410
Social Insurance	$60	$0	$60
Excise and Fees	$483	$223	$706
Property	$111	$2,898	$3,008

Source: Tourism Economics

Total tax revenue – 2023 ($ millions)

	Direct	Indirect / Induced	Total
Total Tax Revenues	**$10,412**	**$9,704**	**$20,116**
Federal	**$4,482**	**$5,852**	**$10,334**
Personal Income	$1,969	$2,561	$4,530
Corporate	$346	$607	$953
Indirect Business	$183	$122	$306
Social Insurance	$1,983	$2,562	$4,545
State and Local	**$5,930**	**$3,852**	**$9,783**
Sales	$2,207	$1,469	$3,676
Bed Tax	$875	$0	$875
Personal Income	$455	$592	$1,047
Corporate	$149	$261	$410
Social Insurance	$26	$34	$60
Excise and Fees	$415	$291	$706
Property	$1,803	$1,206	$3,008

Source: Tourism Economics

Industry Comparison

In 2023, the sports tourism sector supported more direct jobs than many large sectors, including barber shops and beauty salons, highways, street, and bridge construction, pharmaceuticals, and oil and gas extraction.

Direct employment – 2023 (thousands of jobs)

	Employment
Motor vehicles, bodies and trailers, and parts manufacturing (3361/2/3)	1,041
Offices of certified public accountants (541211)	551
Furniture and home furnishings stores (442)	433
Motion picture and sound recording industries (512)	419
Wood product manufacturing (321)	418
Sports tourism	**414**
Barber shops and beauty salons (812111/2)	402
Credit unions and other depository credit intermediation (52213/9)	379
Highway, street, and bridge construction (2379)	370
Pharmaceuticals and medicines (3254)	346
Oil and gas extraction (211)	117

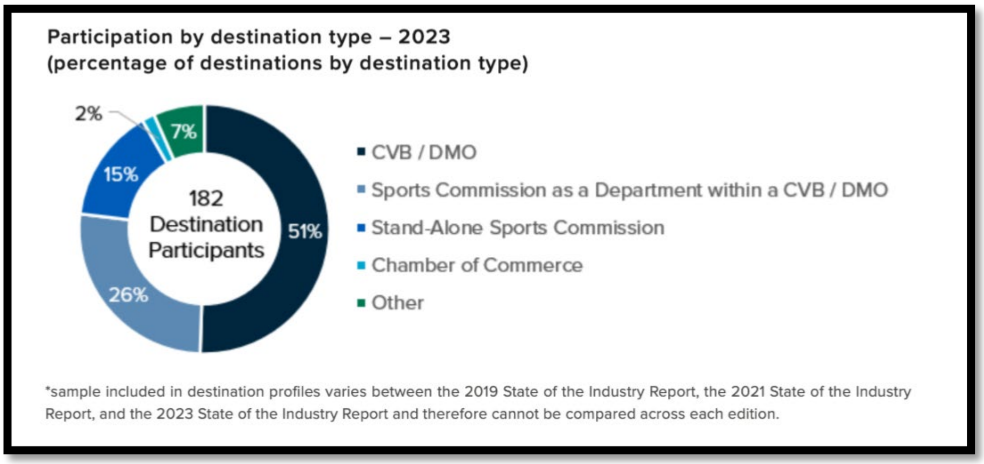
Note: numbers indicate three- to five-digit North American Industry Classification System (NAICS) code corresponding to such industry sector.

Source: Bureau of Labor Statistics

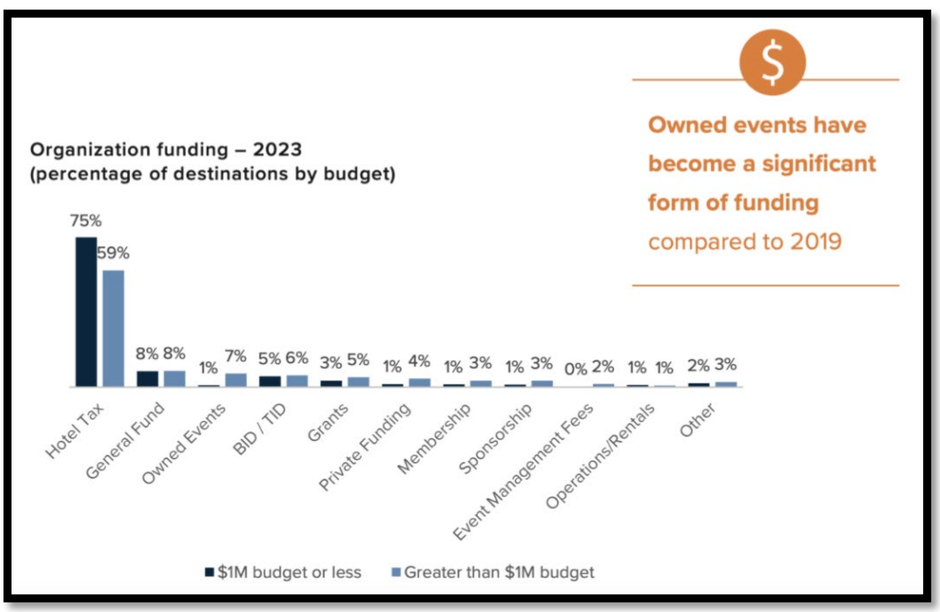
4) Destination Profile Analysis: Sports Events

The 2023 State of the Industry survey reveals patterns across sports destination organizations of different sizes. Funding methods show differences based on budget size, with smaller destinations relying more heavily on hotel taxes while larger organizations demonstrate more diversified funding sources. The survey highlights that while all destinations are experiencing growth in event hosting, the scale and scope of these events vary significantly based on organizational resources.

The 2023 State of the Industry survey was completed by **182 Sports ETA destination members**.

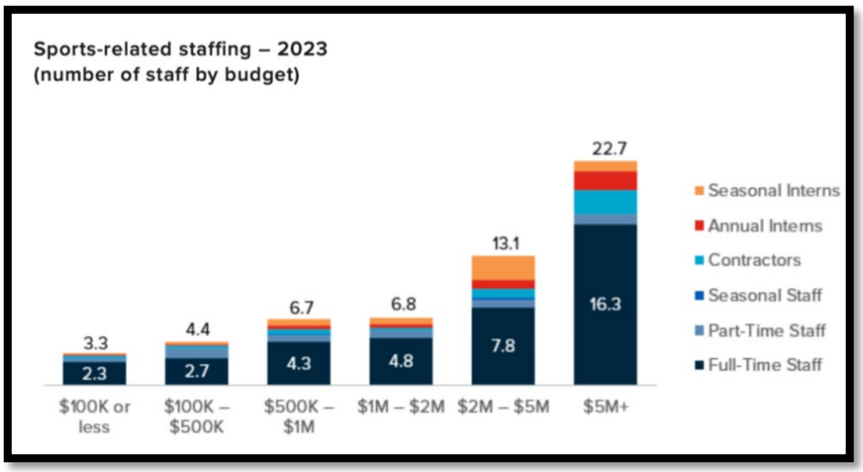


Organization Funding:



- Hotel taxes funded the majority of destination organizations in 2023.
- Destinations with a budget of $1 million or less had a more significant percentage of their budget (75%) funded by hotel taxes compared to those destinations with a budget over $1 million (59%).
- Destinations with a budget over $1 million had a larger percentage of their budget funded by owned events (7%), BID/TID (6%), grants (5%), private funding (4%), membership (3%), sponsorship (3%), event management fees (2%), and other sources (3%). Other funding sources included partnership co-ops and private funding.
- The general fund (8%) and operations/rentals (1%) funded the same percentage of budgets for destinations with a budget of $1 million or less and destinations with a budget over $1 million.

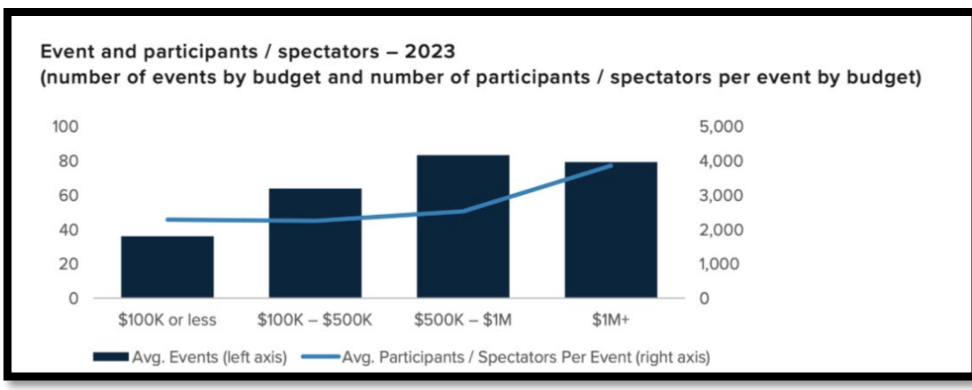
Sports-related Staffing:

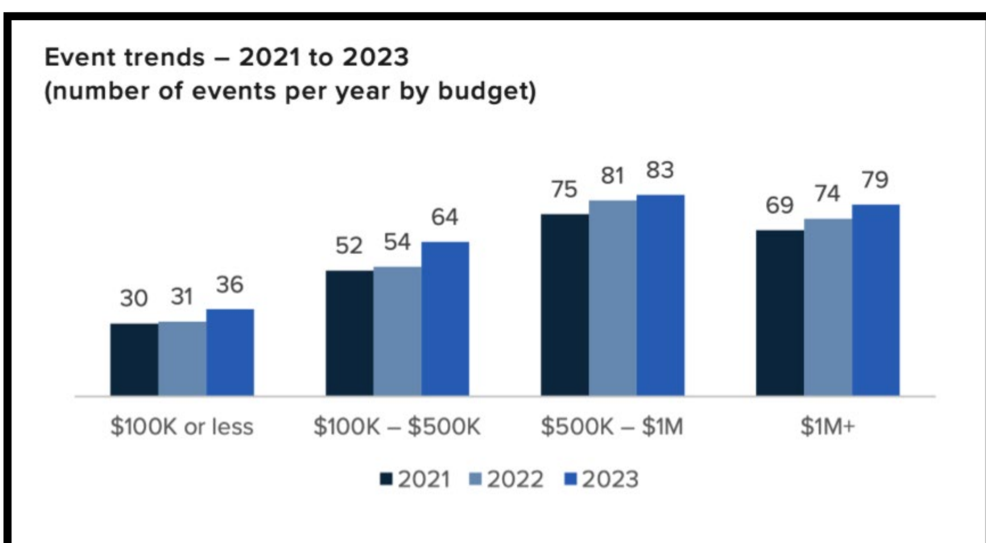


- The number of sports-related staff employed by a destination directly relates to the overall budget.
- The number of full-time sports-related staff at destinations ranged from 2.3 at smaller-budget destinations to 16.3 at larger-budget destinations. When part-time staff and interns are considered, the total number of sports-related employees ranged from 3.3 to 22.7, depending on the budget.
- The average destination, regardless of budget, employed 4.8 full-time sports-related staff and 7.3 total sports-related staff, including part-time staff and interns.

Event Trends by Budget:

- **"**Destinations, regardless of budget, hosted an average of 69 events in 2023. These events welcomed an average of 2,950 participants and spectators per event."
- "Destinations hosted an average of 69 events in 2023 ranging from 36 at destinations with a budget of $100,000 or less to 83 at destinations with a budget of $500,000 to $1 million."
- "The average number of participants and spectators per event correlated to the destination budget – ranging from 2,290 participants per event at destinations with the smallest budget to 3,860 participants per event at destinations with the largest budget."
- "The average number of events increased each year from 2021 through 2023 for all destinations regardless of budget."
- "Moving forward, 69% of destinations expect the number of events to increase in 2024, with only 6% of destinations anticipating the number of events to decrease."





The chart displays trends in the number of events from 2021 to 2023, categorized by budget size. Key observations include:

1. **Overall Growth** – Across all budget categories, the number of events has increased from 2021 to 2023, indicating a positive trend in event hosting.
2. **Higher Budget Events Dominate** – Events with budgets of **$500K–$1M** and **$1M+** have the highest number of occurrences, growing steadily each year.
3. **Significant Increase in Mid-Range Events** – The **$100K–$500K** budget category saw notable growth, increasing from 52 events in 2021 to 64 in 2023.
4. **Small Budget Events Are Stable** – The **$100K or less** category remains the smallest segment but still shows slight growth from 30 to 36 events.

This suggests a recovery or expansion in the sports event industry, with higher-budget events continuing to thrive while mid-range events see the most significant growth.

Geographic Information Systems (GIS) Analysis

As part of this research project, a GIS-based analysis was conducted to identify and evaluate parcels of land with potential for development.

Data and Methodology

The dataset included the identification of vacant properties as well as the following attributes for each parcel:

- **Land Use Code**
- **Town Code**
- **Developable Acres**
- **Tax Account Number**
- **Street Address**

Using this data, a spatial analysis was performed to visualize and quantify development potential across Montgomery County. A total of 81 parcels were analyzed.

Under the guidance of the Montgomery County GIS Team, a map was created to display the geographic distribution of these parcels. Each parcel was symbolized based on the number of developable acres, allowing for easy identification of larger tracts of land.

Statistical Summary

To better understand the spread of developable land area across parcels, basic descriptive statistics were calculated:

- **Minimum:** 4.56 acres
- **First Quartile (Q1):** 11.23 acres
- **Median:** 16.55 acres
- **Mean:** 22.10 acres
- **Third Quartile (Q3):** 25.91 acres
- **Maximum:** 111.58 acres

These results show that while most parcels range between 11 to 26 acres, a few parcels significantly exceed this range, indicating opportunities for large-scale development.

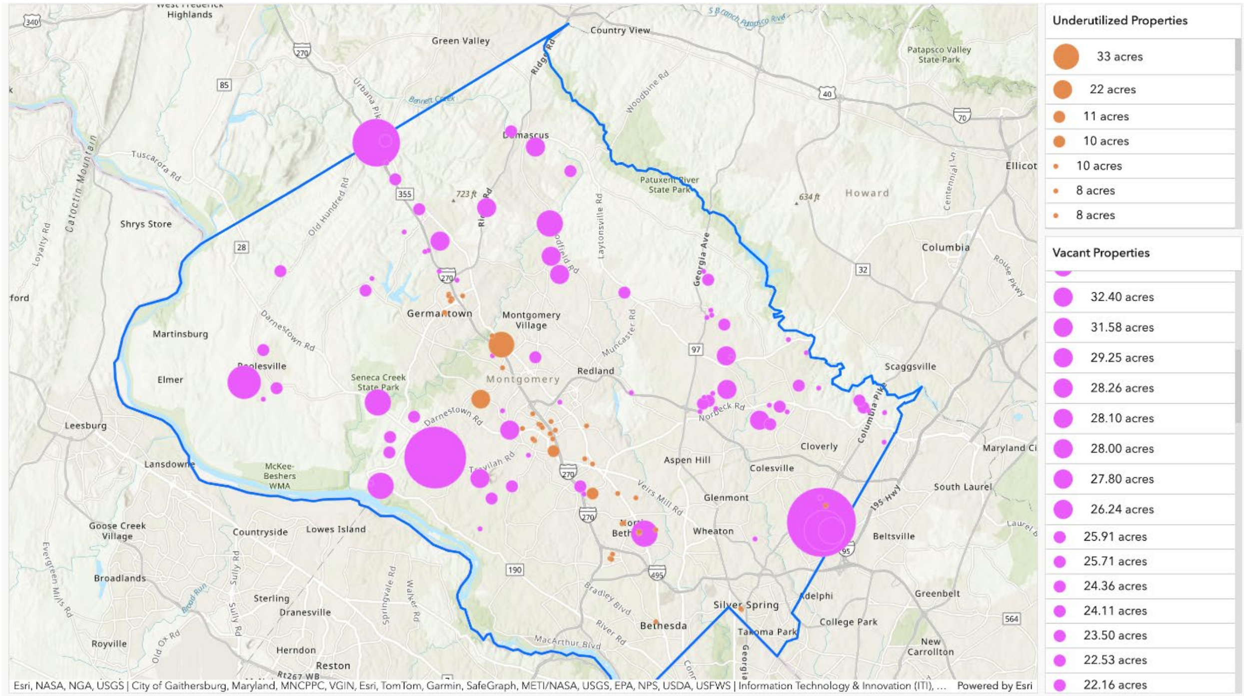
Key Observations

- The largest parcel (111.58 acres) is located on **Cherry Hill Road**.
- Several other parcels exceeding 50 acres are concentrated along **Darnestown Road**, **Woodfield Road**, and **Belward Campus Drive**.
- Some addresses are missing or listed as "0", which may require further verification or cleanup for more precise location analysis.

Map Visualization

The accompanying map illustrates the spatial distribution of developable parcels. Larger parcels are clearly distinguishable and can inform further decision-making regarding land use planning and prioritization.

Figure 1. Spatial distribution of parcels.



Conclusion

This GIS analysis helped identify key areas with potential for future development based on parcel size. The visualization and statistical summaries provide a foundation for deeper investigation, including environmental constraints, zoning regulations, and proximity to infrastructure.

Team 2 Data Analysis

Sports Event Organizer Survey: Key Findings, Trends, and Implications

Survey Overview

Survey Overview

To support the work of the Sports Tourism Task Force, a targeted survey was distributed to 36 sports event organizers representing a diverse range of sports and tournament types. The survey aimed to gather firsthand insights on organizers' facility needs, event planning priorities, cost considerations, and perceptions of Montgomery County as a tournament destination. Responses provided valuable data to identify current challenges, opportunities for growth, and actionable recommendations to enhance the county's competitiveness in the sports tourism market.

Event Scale, Frequency, and Duration

Survey responses show that Montgomery County is already hosting high-impact events, but there is room for strategic expansion. Nearly half of all respondents (48%) reported organizing **five or more events annually**, demonstrating a sustained commitment to hosting regional and national competitions. Furthermore, **82% of events** span **two or more days**, with 23% lasting over three days—highlighting opportunities to drive overnight stays and extended visitor spending.

In terms of size, **50% of events attract more than 500 participants and spectators**, including a notable **14% of organizers whose events draw over 2,000 attendees**. These findings indicate that Montgomery County already engages with sizable tourism activity and stands to benefit economically from increasing venue capacity and availability.

Tourism Reach and Regional Draw

One of the most compelling findings was the strong out-of-county and out-of-state attendance. **95% of organizers** indicated that their events bring in participants or attendees from beyond their immediate community, while **86% of events** attract out-of-state visitors. This confirms that Montgomery County's sports tourism sector is a regional asset, not just a local amenity. Events with such geographic reach stimulate local lodging, dining, retail, and transportation sectors.

Facility Usage, Gaps, and Barriers

When asked about venue usage, organizers frequently cited public and educational spaces, including:

- **61% of organizers** using **public recreation facilities**
- **57% relying on school facilities**
- **41% utilizing private sports venues**

However, access remains a critical challenge. The most frequently cited barriers include:

- **Scheduling conflicts** with school programs and community use
- **Insufficient facility quality** (e.g., outdated amenities, lack of climate control)
- **Lack of regulation-size fields or courts**
- **Inadequate infrastructure** such as parking, restrooms, and seating

What are the biggest challenges or drawbacks to hosting events in Montgomery County?

35 out of 36 answered

Lack of funding, number of parking spaces

Availability and costs

Funding

Organizers repeatedly expressed interest in expanded access to **multi-field/multi-court indoor and outdoor complexes**, which could reduce scheduling friction and accommodate larger tournaments.

Economic Impact and Measurement Capacity

Only **48% of respondents** currently measure the **economic impact** of their events, revealing a potential blind spot in quantifying the full value of sports tourism. Among those that do:

- **33% use internal or proprietary tools**
- **10% rely on hotel or lodging data**
- **10% utilize surveys or government data**

A significant **52% of organizers** do not measure impact at all, largely due to a lack of time, expertise, or access to standardized tools. This presents an opportunity for the County to offer a centralized impact calculator or third-party evaluation services.

Marketing and Promotion Support

Marketing limitations are a major pain point for event organizers. When asked how they promote their events:

- **70% rely on social media**
- **43% use word-of-mouth or participant networks**
- Only **27% report receiving promotional support from local government or tourism bureaus**

Additionally, over **50% of respondents** explicitly identified **limited marketing reach** as a barrier to growth. Enhanced partnerships between the County and event hosts could help raise the profile of local tournaments and drive more out-of-county engagement.

Growth Potential and Organizational Capacity

Encouragingly, **34% of organizers** stated they could **grow their events in size or number** if key challenges—primarily access to modern facilities and stronger marketing support—were addressed. Yet, growth potential is tempered by limited organizational capacity:

- **43% of surveyed organizations** operate as **nonprofits**
- **36% are for-profit LLCs or businesses**
- Only **9% of organizations** employ **full-time staff**, with most relying on volunteers or part-time help

This underscores the need for County-led coordination, shared event services, and investment in facility management infrastructure to alleviate administrative burdens on small organizations.

Trends by Sport Type and Venue Demand

Respondents represented a diverse array of sports, including:

- Soccer (indoor and outdoor)
- Basketball
- Baseball/Softball
- Track & Field
- Volleyball
- Lacrosse
- Pickleball and emerging sports

Strong demand was for multi-use indoor spaces, especially for winter tournaments, shoulder-season play, and **synthetic turf fields** that reduce weather-related cancellations. Organizers frequently cited the value of **centralized facilities with multiple fields/courts, ample parking, spectator seating, concessions, and nearby hotels**—criteria that currently limit Montgomery County's competitiveness in attracting high-value events.

Outliers and Noteworthy Responses

While most respondents reported modest-sized events, a handful stood out:

- One organizer reported events attracting over **5,000 attendees annually**
- Two organizers host events with more than **15 participating teams across multiple states**
- A few organizations operate regional circuits or national qualifying tournaments, indicating Montgomery County's potential to become a hub for larger events with proper investment