



February 1, 2017



# MANHATTAN, KANSAS

## CONVENTION & VISITORS BUREAU

SPORTS MARKETING ANALYSIS  
& STRATEGIC RECOMMENDATIONS



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This section includes an overview of the area's current tournament capable assets, including facilities and related infrastructure that have the potential, or have a history of hosting tournaments and events.

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The following section summarizes VSM's findings relative to MKCVB's sales, marketing and recruiting performance. VSM analyzed relevant data about MKCVB's sports marketing efforts, interviewed staff and stakeholders, and has provided recommendations for strategic and operational adjustments.

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VSM's final summary and recommendations for infrastructure improvements, strategic direction, marketing and operational improvements.

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VSM analyzed viable sports marketing trends, opportunities and segments that either match existing venues, or should be considered for future infrastructure improvements and development in Manhattan.

# SECTION 1: OVERVIEW AND METHODOLOGY

A sports facility evaluation and sports marketing analysis of the greater Manhattan, Kansas area for the Manhattan Kansas Convention and Visitors Bureau (MKCVB), has been conducted and completed by Visibility Sports Marketing (VSM). VSM conducted research, reviewed and analyzed previous tourism/sports studies, visited primary sports venues and support infrastructure, interviewed MKCVB staff and various tourism/sports stakeholders to ascertain the overall scope of Manhattan's facilities, infrastructure, sports marketing opportunities and strategies.

Pre and post visitation research was also conducted, including consultations with event rights holders and governing bodies. Marketing opportunities and recommendations for strategic and operational changes have been included throughout this document. Ultimately, these recommendations should guide and assist MKCVB and the greater Manhattan area toward effectively targeting the optimum market segments, balancing supply and demand (internal and external) creating sustainable growth and generating the maximum return on investment



Manhattan commissioned two facility and sports related studies in recent years, including the Manhattan Field House by Sports Facilities Advisory, LLC. (2013), and the Parks and Recreation Strategic Facility Improvement Plan (2015). VSM reviewed the studies and recommendations. It must be noted, however, that the studies were primarily focused on addressing the wants and needs of the area's local residents. Both studies addressed existing facility and infrastructure deficits, subsequently providing strategic and tactical recommendations for improvements and potential new facility development. This study includes a facility analysis and recommendations, but primarily focuses on sports tourism as an economic and tourist development strategy.

There are several critical strategies and tactics that are required to develop and sustain a successful sports marketing program. VSM's analysis addresses those success factors and recommended several changes in strategic direction, operations and partnerships, which ultimately will improve the organization's effectiveness and efficiency, while simultaneously benefiting the citizens and economic climate of the area. Meeting the wants and needs of the local citizens, coupled with pursuing economic and tourist development goals are important for the long term economic health of the area; a very powerful complementary effect exists, if planned and managed properly.

Improving Manhattan's sports infrastructure for local citizens and creating a sustainable sports tourism initiative are not mutually exclusive, rather they complement one another. **Pursuing both strategies concurrently will achieve two important objectives that will improve Manhattan's viability as a world class destination to live, work and play: 1. Develop marketable infrastructure that creates a sustainable sports tourism destination, which generates economic impact and creates jobs. 2. Satisfy the sports facility wants and needs of Manhattan's residents.** That's one of the primary recommendations coming from this study; both citizens and local businesses benefit from a result oriented sports marketing initiative.



# SECTION 2: MANHATTAN AND THE SPORTS TOURISM INDUSTRY

## *Baseline Assumptions and Sports Tourism Economics*



### MANHATTAN MSA:

For the purpose of this analysis, VSM has used the term Manhattan to mean the Greater Manhattan Statistical Area (MSA) and not simply the area inside the city limits of the municipality. Sports facilities, restaurants, hotels and various retail establishments that lie outside the city limits collectively comprise the Manhattan Destination and contribute to the totality of offerings, assets and economic impact in the region from sports and tourism business activity.

### SPORTS TOURISM IS AN ECONOMIC ENGINE:

Although sports tourism, sports events (participatory and spectator) and sports economic development are viewed by many as synonymous, there are subtle differences that distinguish the disciplines. **However, the fundamental goals are similar and have been treated in this document as synonymous, primarily because sports in this analysis is an export**"; it's all about economic impact, jobs and prosperity. Exports bring "new" money into the community, increasing the quantity and velocity of money and making the entire region better off.

### THE COMPLEMENTARY EFFECT:

Tournament sports facilities (quality and quantity) benefit both citizens and the sports tourism industry in very tangible ways. Sports facilities that are designed and built to accommodate tournament events also provide a more effective and efficient solution for meeting the demand of local citizens and for league play. Conversely...quality local sports programming, high levels of sports **participation** of Manhattan's citizens, and vibrant leagues provide a solid foundation for building and sustaining a successful sports tourism initiative.

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### SPORTING EVENTS CREATE THE DESTINATION FOR MANHATTAN:

People have numerous reasons for participating in sports; health, social interaction, personal goals, financial, entertainment, aspirations of becoming a champion, and many more. “Participating” as an athlete, official or spectator in organized sports events, however, usually involves travel to a destination away from one’s home. As such, the only place that participants could have been involved in the 2016 National Softball Association’s Super World Series, for example, was to travel to Columbus, Ohio. In essence, athletes, spectators and officials must travel to a destination in order to participate in a specific event. The combined attributes of the event and the destination literally create an “attraction”, analogous to creating a mini Disneyworld.

## B

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### BUSINESS CYCLES:

The tourism industry, including Manhattan’s, has seasonal peaks and troughs. In addition, macroeconomic factors such as the strength of the dollar (exchange rate), recessions, GDP and various “spikes” influence the tourism industry’s overall performance over time. By recruiting and hosting events during the seasonal low points, sports tourism serves to raise the troughs and lessen cash flow problems experienced by virtually all tourism related organizations. Sporting events can either be recruited and or “grown” in a tourism destination to improve the local economy; this also applies to Manhattan.

## R

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### RECESSION RESISTANT:

In the months and years after 911 and The Great Recession, the global tourism industry took a nose-dive. However, as Disney’s Wide World of Sports and many destinations around the country discovered, sports travel did not realize the precipitous drop that the leisure and business travel sectors experienced. For many athletes and spectators, sports are viewed as a birthright; it’s a part of life that is fundamentally a non-negotiable need, especially for “Core” athletes.

Empirical evidence demonstrates that parents, with children who participate in competitive and even recreational sports, will make significant sacrifices to ensure that their children have the opportunity to compete. It frequently means that parents forego buying a new car, furniture or going out for dinner. As one parent explained it shortly after 911, “This may be the only chance in her lifetime that my daughter has the opportunity to play in the Girls Fast Pitch World Series; there is nothing that will stop us from attending”. According to Peter Yasewich, a respected travel research expert, parents are now turning their children’s sporting events into family vacations; good news for destinations that embrace the sports tourism segment.

## E

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### SPORTS TOURISM IS MEASURABLE:

The economic impact of sporting events are measurable and relatively easy to quantify. Later in this document VSM has provided, and is recommending, a basic model for measuring the economic impact and return on investment (ROI) from sporting events.

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## FACILITY CATEGORIZATION:

In Section 3, and throughout this document, VSM has placed Manhattan's facilities into three main categories, or types of facilities: 1. Competition Facilities 2. Stadium/Championship Facilities and 3. Ancillary (Auxiliary) Facilities.



**A**

### COMPETITION FACILITIES

Are tournament quality venues, have multiple playing surfaces (clusters), tournament amenities and the capacity to host medium to large events that attract "out of town participants and measurable economic impact. Competition facilities also more effectively and efficiently serve local citizens, groups and league play.

**B**

### STADIUM OR CHAMPIONSHIP FACILITIES

Are typically venues with one very high quality playing surface, significant spectator capacity and premier tournament amenities.

**C**

### ANCILLARY FACILITIES

Are usually venues that lack the quality and quantity of playing surfaces to serve as primary Competition Facilities. Low level Ancillary facilities are not marketable tournament assets for a destination, and usually need significant upgrades and tournament amenities.

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## LEVELS OF SPORTS PARTICIPATION:

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Understanding sports participation trends is critical when making infrastructure investments and for developing a sustainable sports marketing initiative. VSM considers the Sports Fitness Industry Association's categorization of sports participants (athletes) as one of the best available tools. This measurement model categorizes sports participant's activity levels into three basic categories, and then compares trends over extended periods of time.

CASUAL PARTICIPANTS:	CORE PARTICIPANTS:	TOTAL PARTICIPATION:
Participation varies by sport, with athletes usually engaging in their respective sports discipline between 2-26 times per year, but could be as high as 50, as is the case with swimming. Many in the sports industry consider these individuals as "recreational athletes", and for the most part they are not involved in sanctioned competitions.	Participants who have the highest probability of engaging in sanctioned competitive events. This participation segment is the primary target market for sports destination marketing organizations, sports equipment manufacturers and sports governing bodies.	Individuals who participate in a specific sport more than one time per year.

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## THE SPORTS INDUSTRY:

It must also be recognized that the sports industry, both locally and globally, is "big business". One needs look no further than Manhattan itself, including Kansas State University, which has invested more than \$192 million in sports related infrastructure over the past few years. On an annual basis, according to Dr. Lisa Neirotti of George Washington University, sports tourism accounts for more than 14% of all tourism revenues. That number, however, is arguably very low and subject to debate, as many areas of the country report that sports tourism is their largest driver of visitation and generator of tourism dollars. Many municipalities and regions report that sports tourism exceeds 25% of their annual revenues. In the State of Florida, for example, sports is the state's second largest industry (\$57.4 billion), trailing only the tourism industry, which is projected to exceed \$89.1 billion in 2016.

The sports tourism industry is growing. Currently there are more than 400 active sports commissions and/or CVBs with dedicated sports initiatives (nationwide) that are active in the sports event market segment.

## DESTINATION IMAGE:

Iconic infrastructure (venues or facilities) create competitive advantage for destination marketing organizations; it's a primary reason for visitors to travel to a destination. Examples are numerous and include venues such as Yankee Stadium in New York, the Daytona Speedway in Florida and the Rose Bowl in California. Sports venues can also serve as iconic brands, powerful economic engines and image builders. Green Bay Wisconsin, for example, would be just another Midwestern city if it were not for Lambeau Field and the Green Bay Packers. The same argument can be made for Kansas State and Manhattan... it's simply a core part of the Manhattan brand.





## TANGIBLE AND INTANGIBLE BENEFITS:

The sports tourism sector brings a myriad of benefits, including: it's recession resistant, generates significant economic impact and jobs and sporting events literally create a destination. According to Sports Events Magazine's annual "Trends and **Economic Impact Report**", several interesting trends have emerged over the last two years.

- The economic impact of the sports events marketplace increased by 9.6% in 2015.
- Spending per athlete, per event, increased 2.15% and athletes averaged spending \$867 per event in 2015.
- The average economic impact per event in 2015 was \$250,675 (no multiplier used).
- 45% of destination officials have opened or expanded sports venues in 2015. Multi-purpose fields, baseball, and softball are the most common new venues. Venues for sports such as gymnastics, volleyball, pickleball, kickball, various mat sports, cheer-leading and dance are also seeing an increase.
- Even during recessionary times, core athletes just keep competing and traveling; participants and spectators must travel to a destination in order to compete in an official sanctioned championship event.
- Kids are moving to less mainstream sports such as lacrosse, rugby, cycling and competitive swimming.
- The sport industry's largest participation group is Gen Y, or Millennials (born 1980-1999).
  - Outdoor and team sports are their preferred activities.
  - Preferred outdoor sports competitions include cycling, frisbee, running events and flag football.



## SECTION 3: MANHATTAN'S COMPETITION VENUES

Without a product or service, organizations simply don't have anything to sell. This is a fundamental sales and marketing principle that also applies to all sports destination marketing organizations, including MKCVB. Simply, a destination **MUST** have marketable infrastructure, and this means venues that event organizers are willing to use, versus those from competing destinations. Conversely, building a "Field of Dreams" does **NOT** mean that "they will come", or that it will even satisfy the demand of local citizens. There must be a match between the customer's wants and needs and the venues and services that are being offered by a destination. The hyper-competitive sports event marketplace requires more, but it all starts with infrastructure.

### A

The overall quantity and quality of Manhattan's sports facilities are "marginal". Manhattan does have some "very good" and marketable sports venues that are capable of producing measurable economic impact. There are, however, several facilities that are not acceptable for tournaments and others that are in desperate need of improvement, even for local leagues or recreational use, but definitely not for sanctioned competitions. Kansas State, on the other hand, has a portfolio of venues that are world class, and in many cases have the quantity of playing surfaces to host large participatory events. Similar to many university communities, the cost of facility rentals and access to the university's facilities is potentially problematic, an issue that needs to be seriously addressed if MKCVB wants to expand its sports tourism efforts.

### B

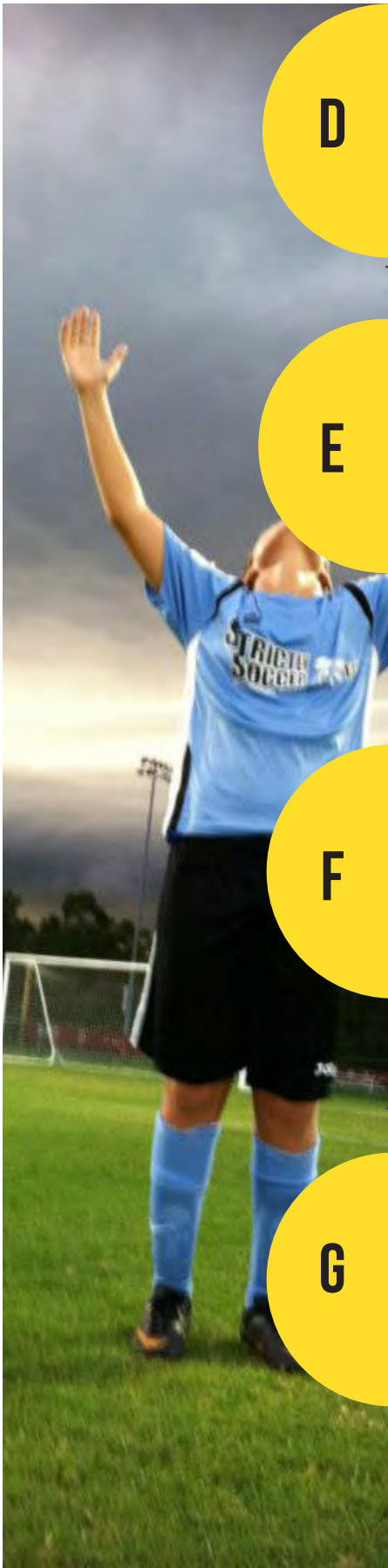
In certain sports disciplines, Manhattan simply doesn't have either the public indoor or outdoor facilities in sufficient quantity or quality to pursue championship events with large numbers of participants. Cognizant of these infrastructure shortcomings, there are still opportunities for MKCVB to generate overnight stays from the area's facilities, albeit with solid strategic planning and effective marketing efforts.

Long term potential, however, will be a different story without refurbishing existing facilities and possibly developing additional venues. In fact, Manhattan must seriously address this issue if it has aspirations of sustaining a successful program over the long haul. Unfortunately, some of these deficiencies involve sports disciplines that represent excellent opportunities for recruiting and retaining high impact events. These sports include, but are not limited to: basketball, volleyball, various mat sports, softball, soccer, baseball, "outdoor" sports and a plethora of indoor sports.

### C

**Facility Clusters are Critical:** In conducting our research, VSM discovered that very few of Manhattan's facilities were designed and built for the primary purpose of attracting competitive events. Most facilities were constructed for the purpose of providing local programming and/or service for local citizens, but they don't satisfy quality and quantity standards to satisfy local demand either.

Manhattan, like many sports oriented communities, has sports facilities scattered throughout the community, which are not tournament capable. Recent trends in parks and recreation development strategy have advocated a more centralized approach to facility enhancement and development, and for good reason – economies of scale, cost savings, programming efficiency and effectiveness. Don Ruedlinger, President of Youth Basketball of America, recently stated that "one of the keys to hosting championship events is having enough facilities in one location. It's simply too costly to effectively run a tournament without an adequate concentration of courts". Whether its basketball, baseball, soccer or the multitude of indoor/outdoor sports disciplines, having a cluster of tournament quality courts/fields in one location is of critical importance when recruiting and hosting sporting events.



**D**

Marketing and sales create and sustain demand, that's the primary factor that generates overnight stays and economic impact for potential sports destinations like Manhattan, which is a subject that VSM will address later in this document.

**E**

Keep in mind, "tourism and sports events" are exports. Fundamentally, sporting events generate new dollars that flow into the area, increasing the quantity and velocity of money in a community, region or state. When money flows out of a community or a business for that matter, the community has less wealth. Very simply, Manhattan's citizens and economy are made better off when sports venues are of sufficient quantity and quality to accommodate competitive events that pump new dollars into the area, and simultaneously satisfy the demand of its local citizens.

**F**

The bottom line for MKCVB and the tourism industry is the overall quantity and qualities of Manhattan's public facilities are marginal. The quality, quantity (i.e. sufficient supply), venue clusters and access to "some" competition sports facilities will continue to impact the organization's ability to market the area as a revenue generating sports destination. This is an important issue for the Manhattan tourism/sports industry in terms of lost opportunities and revenue. Overall, Manhattan has numerous facilities which can sustain a productive sports marketing initiative in the short term, but definitely keeping the area below its full potential long term. The following summarizes Manhattan's event capable sports venues and facility clusters that have the potential to host a variety of sports and championship events.

**G**

The following sports facilities (supply side analysis) does not constitute a comprehensive assessment of Manhattan's entire portfolio of competition capable sports venues. Rather, it outlines specific sports disciplines and facility clusters which have a history of, or the potential to host sporting events with an acceptable return on investment. Essentially, these venues have the capacity to host small to medium events, either as stand-alone facilities or when combined with other facilities in close proximity. However, as previously noted, some venues or clusters are "not" tournament capable, either because the venue quality is not up to competitive standards and requires additional resources, or the quantity of competitive facilities is inadequate; they fundamentally represent missed opportunities, lost revenue, lost economic impact and jobs for Manhattan.

# OUTDOOR COMPETITION SPORTS FACILITIES:

## FRANK ANNEBERG PARK:

This park is one of Manhattan's most impressive sports and recreation venues and a showpiece for the area. VSM, with MKCVB staff, toured the park on September 1, 2016 and found the facility aesthetically beautiful and tournament capable. The complex creates an enviable destination for Manhattan, with VSM particularly impressed with the Jerry Dishman Lake and the spectator friendly amenities and support infrastructure.

## TWIN OAKS AND COLLEY COMPLEXES:

The competition oriented four (4) field Twin Oaks softball facility, with lights, can accommodate both adult and youth softball events (using temporary fencing for youth events). Most four field facilities are capable of accommodating 25-30 teams, using a two round championship format during a normal weekend tournament. The park is aesthetically beautiful, the recreational amenities are outstanding and surrounding infrastructure, including the multi-purpose fields, are marketable assets.

A) Although the fields are set-up for adult softball; the complex can easily accommodate girls fast-pitch softball and youth baseball tournaments. Youth baseball tournaments are a practical match at this facility, as many youth baseball events throughout the country are played on similar skinned infields using portable pitching mounds and temporary fencing. Portable pitching mounds and temporary fencing can simply transform a quality softball complex into a baseball tournament venue.



B) The two fields at the Colley Complex (fields 5 and 6) also have 300' radii, and are capable of accommodating baseball, adult and youth softball tournaments. Combined, the Twin Oaks and Colley complexes increase the venue's ability to host at least 40 teams during a normal weekend tournament.

- ***Facility Category: Competition***

- ***Primary Target Markets: Youth Softball, Adult Softball and Youth Baseball.***



## MANHATTAN SOCCER COMPLEX:

The Manhattan Soccer Complex features four primary fields, which were in “relatively” good shape but could use some improvement in turf management for championship level events. Peak season usage definitely challenges the park’s maintenance crew, and with the dramatic increase in the popularity of soccer, rugby, lacrosse and field hockey, grass fields can quickly deteriorate. Synthetic turf should seriously be considered, as the demand for “multi-purpose fields” is growing significantly.

A) In light of the regional competition from other complexes competing for the lucrative soccer business, and the potential for the facility to generate significant economic impact; VSM highly recommends that minor upgrades be made to the turf and amenities on the two fields adjacent to the Colley Complex. While touring the facility, VSM discovered that the fields had some turf (grass) and leveling issues; if left uncorrected, this situation could have an impact on the Manhattan’s ability to successfully recruit and host larger championship events in this competitive market segment.

B) As previously mentioned, the title “Soccer Complex” is misleading, as the facility can also be used for other popular field sports like rugby, lacrosse and field hockey. What has become much more practical in the sports industry is the term “multi-purpose fields”, as the term is more accurate and inclusive relative to the actual activities taking place on these “rectangles”. The title does not effectively and efficiently serve the local citizens, or the tourism industry. VSM recommends the term “multi-purpose” fields, rather than the sport specific term “soccer fields”, as multi-purpose more accurately describes the facility’s ability to host a wide variety of field sports and creates an inclusive image for all sports disciplines.



C) Other potential upgrades should be considered, which would enhance the functionality and attractiveness of the park, including additional parking, improved irrigation or synthetic turf, more spectator seating, larger concession stands and restrooms. With upgrades, VSM believes this park has the potential to be a “first class venue” and a powerful economic engine for the Manhattan area.

- **Facility Category: Competition**

- **Primary Target Markets: Soccer, Rugby, Lacrosse, Field Hockey, Flag and Tackle Football.**



## CICO PARK:

Prior to visiting the park, VSM was optimistic that this complex had potential...it still does, but not without some major upgrades to the Lud Fiser Youth Sports Complex.

## LUD FISER YOUTH SPORTS COMPLEX:

This complex features five skinned in-fields and a variety of field surfaces, definitely limiting the ability to host championship events. The skinned infields can be used for both softball and baseball, similar to the possibilities at Frank Anneberg Park. However, the irregular dimensions are problematic for recreational, league and tournament usage. Space restrictions may limit the expansion of the 250' to 300' field for baseball and adult softball, but VSM recommends reconfiguring and refurbishing the existing fields to effectively target the youth baseball and softball markets.

A) This five field complex is used by local leagues, but it is outdated. Field conditions, including poor turf grass, infield issues and leveling problems limit its usefulness and productivity as a tournament host site. The lighting definitely needs to be improved, which would expand the facility's functionality, usage and safety. The scoring booths are very questionable and possibly unsafe. The concession stands and bathrooms are in need of repair. In its current condition this facility is neither adequate nor safe for recreational or league play, let alone a competitive facility in today's competitive softball/baseball marketplace.

B) VSM believes that this park has "tremendous potential" as a tournament venue, but only with an investment in a comprehensive redesign and infrastructure improvements.

- **Facility Category: Ancillary (low level)**
- **Primary Target Markets: Youth Baseball and Youth Softball.**

## BISHOP STADIUM AND TRACK AND FIELD:

With its all-weather track, synthetic turf field and seating for more than 4,000, this facility and the accompanying CiCo Park amenities have the potential to host track and field, cross country, cheerleading, major championship finals and numerous non-sporting events including, drum and bugle corps and flag line events.

- **Facility Category: Competition**
- **Primary Target Markets: Track and Field and Endurance Sports.**



## CITY PARK:

While touring this complex, VSM observed the entry monuments, historical significance and amenities, all making this park aesthetically beautiful, but not marketable as a primary competition sports venue.

## WILSON, BAKER AND MILLER FIELDS:

The facility has three (3) youth fields, which serve both youth softball and baseball, but are not tournament quality; all playing fields are in need of significant upgrades. The grass turf is poor at best and lacking in quality irrigation, the fencing is poor or non-existent, lighting is inadequate and a lack of tournament quality scoreboards severely limit the usefulness of these fields, even for league play.

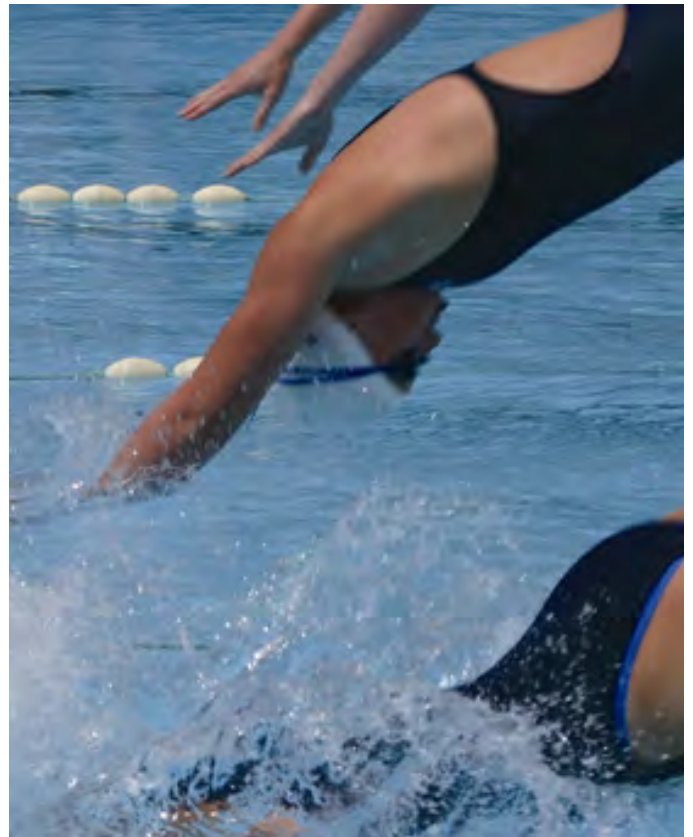
If youth baseball and softball are a priority, VSM believes that reconfiguring the size and layout of the fields is a must, not to mention improving the overall quality of the playing surface and tournament related amenities.

- **Facility Category: Ancillary (low level)**
- **Primary Target Markets: Youth Baseball and Girls Fastpitch Softball.**

## CITY PARK POOL:

A wonderful recreational facility with limited event capabilities. The 50 meter pool is an asset but needs competitive amenities and it should be enclosed to be attractive in the year round swimming meet marketplace.

- **Facility Category: Competition(limited)**
- **Primary Target Markets: Swimming and various other aquatic disciplines.**



## TENNIS COURTS:

Playing surfaces, spectator seating and related amenities aside, the quantity of courts limits this facility to very small locally based competitive events. 10-12 courts are needed to host both local league play and championship events that can produce significant economic impact.

- **Facility Category: Ancillary**
- **Primary Target Markets: Tennis and Pickleball.**

***VSM believes that the entire park has “tremendous potential” as a tournament venue, but only with an investment in comprehensive redesign and infrastructure development.***

## EISENHOWER BASEBALL COMPLEX:

Norvell Field's dimensions are 325' down the line and 375' in center field, quality turf grass, warning track, spectator seating, sports lighting and fencing. Dated, but otherwise the two batting cages are an asset in Manhattan's facility profile. The two "practice fields" could also be used for adult softball. Unfortunately, the quantity of fields in one location (3) limits the use of this otherwise good quality facility to an overflow tournament venue.

- **Facility Category: Ancillary**
- **Primary Target Markets: Baseball and Adult Softball.**

## FAIRMONT PARK:

With the exception of the 18 hole disc golf track, this 100 acre park has little current tournament usefulness. The future potential of this facility is significant. VSM believes a multi-purpose (soccer, rugby, field hockey, etc.) venue which could easily fit on the existing property, and would significantly complement Manhattan's portfolio of tournament venues. In light of past master planning studies, current citizen needs and potential economic event impact, VSM recommends the implementation of proposed development plans for an outdoor "multipurpose field" complex.

Because of the park's proximity to the Kansas River, and the existing canoe launch, dog park and disc golf track, this park has potential to serve as an effective venue for outdoor competitive sports. Cross country and endurance sports require very minor changes and would have the potential to provide excellent returns.

- **Facility Category: Competition(Disc Golf and Paddle Sports)**
- **Primary Target Markets: Disc Golf, Archery, Endurance Sports, Paddle Sports and various "Outdoor" sports.**

## OPTIMIST PARK:

This productive public-private cooperative partnership is a testament to the cooperative spirit that VSM has witnessed throughout Manhattan. A critical component of successful sports marketing initiatives goes beyond just quality sports venues; it also requires human resources and event hosting capabilities. With the Optimist Club serving in that capacity this facility has tournament potential, but needs infrastructure improvements and field consistency to truly be tournament capable. A public-private capital investment in this facility could easily transform the complex into a productive youth baseball/softball tournament venue.

VSM observed that the fields had turf issues, leveling irregularities and was lacking in quality tournament amenities like dugouts, spectator seating and scoreboards.

- **Facility Category: Ancillary (Low Level)**
- **Primary Target Markets: Youth Baseball**

## COLBERT HILLS GOLF COURSE:

There has been plenty of debate in the sports marketing industry regarding the actual economic benefits and Return on Investment (R.O.I.) of hosting golf events; a championship venue like Colbert Hills makes that decision a bit easier for Manhattan. While touring the facility, VSM was impressed with the 13,400 square foot clubhouse and 2,000 square foot outdoor patio. It's well equipped for major and minor championship events, as evidenced by successfully hosting the 2002 Big 12 Women's Championships, the 2003 NCAA Men's Central Regional and the Kansas Amateur Championships. The quality of the 7,525-yard design course layout with a 77.5 Rating and 152 Slope is a superb competitive course. Colbert Hills is an image builder and reflects well on the quality of sports life in Manhattan.

- **Facility Category: Competition**
- **Primary Target Markets: Golf**

## INDOOR COMPETITION FACILITIES:

For the purpose of this analysis, indoor competition facilities include gymnasiums and multi-purpose facilities (open space) with acceptable flooring, ceiling height, scoreboards and related event amenities.

Manhattan has a few publically owned indoor facilities including City Auditorium, Community House, Douglass Center and several USD 383 gymnasiums. Collectively they comprise enough floor space to host small events. However, from a practical standpoint it would be extremely difficult to recruit events and generate meaningful economic impact on a consistent basis. Event rights holders typically require multiple courts (six or more), or approximately 45,000 square feet of playing surface, which are located in one complex. However, championship events with lower numbers of participants but high spectator numbers can be held at “Stadium” facilities like Bramlage Coliseum and Ahearn Fieldhouse.



*For satisfying both citizen demand and tournament play with large numbers of teams, VSM highly recommends tackling this supply side deficit as soon as possible. A centralized facility with a minimum of six basketball size courts (12 volleyball courts) and versatile enough to accommodate other indoor sports disciplines would provide a practical and cost effective investment for Manhattan.*

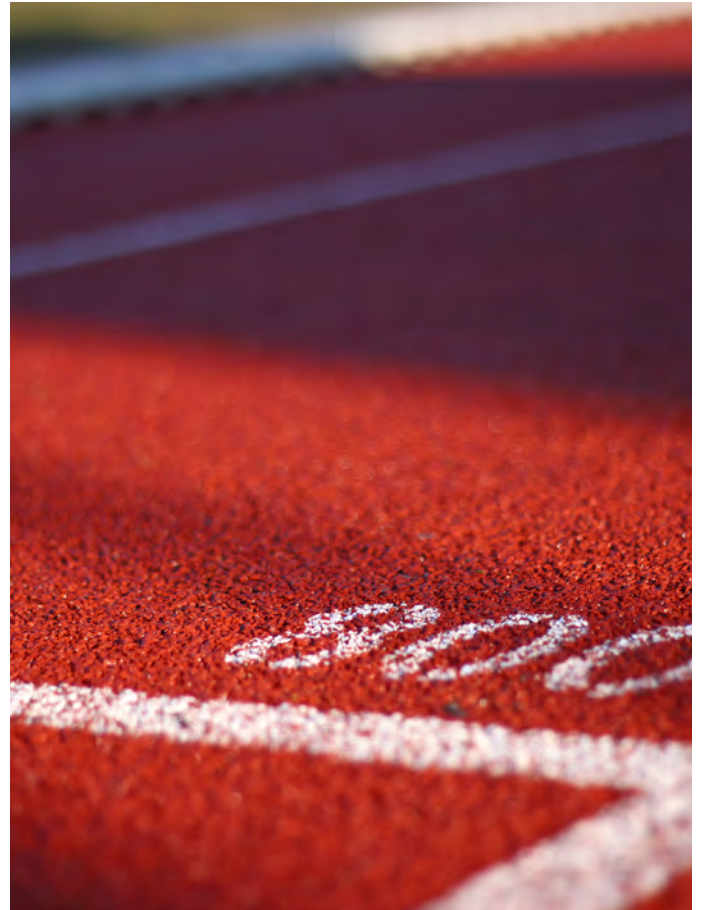
## BOWLING CENTERS:

Bowling is the most popular sport in the United States, with more than 50 million participants nationwide. Competitive bowlers are plentiful in the Midwest, and many high impact bowling events do not require a bid fee and are relatively easy to recruit. Two facilities in Manhattan, Little Apple Lanes (32 lanes) and Kansas State Student Union (16 lanes), combined, feature 48 lanes. Manhattan has had some enviable success in this sports segment, having hosted the both the Men’s and Women’s State Championships, which are held over multiple weekends. Bowling is a profitable market segment with 1.83 others attending each event for each individual competitor. MKCVB should actively support the development this market segment in partnership with Little Apple Lanes.



# KANSAS STATE UNIVERSITY:

Having invested more than \$192 million in sports related infrastructure over the last few years, Kansas State University represents an outstanding opportunity for MKCVB to recruit and host a wide variety of indoor and outdoor sporting events. Kansas State has more than 450 athletes in 16 different competitive sports, in addition to thousands of intramural athletes who utilize these world class sports facilities. VSM has treated this facility behemoth separately, as usage restrictions and costs limit MKCVB's ability to recruit and place events at these facilities. Cooperation and partnerships do exist with the University, but K-State's facilities are not easily accessible for tournaments and can be cost prohibitive, as well. This is not an unusual scenario in university towns like Manhattan. It boils down to establishing sustainable relationships and win-win partnerships with K-State's decision makers.



## A. INTERCOLLEGIATE SPORTS FACILITIES

### **Bramlage Coliseum and Training Facility:**

With a seating capacity of more than 12,000, along with the 50,000 square foot Ice Family Basketball Center, this facility is a world class venue. Primarily a "stadium facility", the Ice Center's two courts and surrounding USD facilities represent a powerful event recruiting tool for MKCVB, and not just for basketball events. There are a host of other sports that can utilize this venue, mindful that hosting tournaments with large numbers of teams would be challenging; the biggest problem is access and facility rental costs.

- **Facility Category:** Stadium
- **Primary Target Markets:** Basketball, Volleyball, Cheerleading, Dance and virtually all Mat Sports.

### **Ahearn Field House:**

A testament to the quality of this facility, K-State has hosted three Big 12 Conference Championships, the Carol Robinson Pentathlon and averages five indoor events per year. The facility also houses the natatorium, K-State volleyball, four tennis courts and an indoor track.

- **Facility Category:** Competition/Ancillary.
- **Primary Target Markets:** Indoor Track and Field, Volleyball, Tennis.

**Bill Snyder Family Stadium and Indoor Complex:** The stadium complex seats more than 50,000 and has the world class capacity to host major championship events, including non-football activities. Three practice fields and the 94,000 square foot indoor facility combined, create a Stadium championship tournament venue. Combined with other sports fields on campus would create one of the finest competitive venues in Kansas. However, access and cost remain the most formidable obstacles to hosting tournament events on an regular basis.

- **Facility Category: Stadium/Competition.**
- **Primary Target Markets: Football, Soccer, Rugby, Lacrosse.**

**Tointon Family Stadium:** Located southwest of Bramlage Coliseum, the baseball stadium has a seating capacity of 2,331, a Daktronics scoreboard, 1,380' press box, television quality lighting and Astro Turf GameDay Grass. The facility is a first class "stadium complex", but lacking "ancillary facilities" to host tournaments that bring a large number teams. Combining Manhattan's other tournament quality venues (Eisenhower Baseball Complex et al) coupled with the world class quality of the Tointon Complex is a very marketable asset for Manhattan.

- **Facility Category: Stadium.**
- **Primary Target Markets: Baseball.**

**R.V. Christian Track Complex:** With seating for 3,000, 8-lane Rekortan track and a history of hosting championship events, this complex is a marketable asset for large track and field and other sporting events. Definitely championship capable, the R.V. Christian Track Complex hosted the three day Big 12 Track and Field Championships in 2005.

- **Facility Category: Stadium/Competition.**
- **Primary Target Markets: Track and Field.**

**Breidenthal Boathouse:** Built in 2005, this relatively new facility sits above the Tuttle Creek Reservoir and has food and beverage facilities for events. Although this facility is designed for intercollegiate rowing, Tuttle Lake and the surrounding infrastructure offer opportunities to recruit, grow your own events and host a plethora of water sports and outdoor competitions for MKCVB.

- **Facility Category: Competition/Training.**
- **Primary Target Markets: Rowing and Various Water Sports.**

**Mike Goss Tennis Stadium:** The stadium features six outdoor courts, Musco lighting and spectator/athlete seating for 400. When combined with the three indoor hard courts at the Body First Indoor Tennis Center and potentially public facilities, Manhattan has the quantity and quality facilities to host relatively large USTA and scholastic events.

- **Facility Category: Stadium/Competition.**
- **Primary Target Markets: Tennis and Pickleball.**

**Soccer Competition and Practice Fields:** The planned competition field (College Ave.) with spectator seating, lighting and scoreboard coupled with the two practice fields will provide a championship quality facility (Stadium), but not practical for larger soccer, rugby, lacrosse or field hockey tournaments.

- **Facility Category: Stadium/Ancillary**
- **Primary Target Markets: Soccer, Rugby, Football and Field Hockey**

## B. INTRAMURAL/RECREATIONAL FACILITIES:

**Peters Recreation Complex:** This massive indoor/outdoor facility includes:

- A) 14 Racquetball Courts.
- B) Three Gymnasiums: 10 Basketball Courts, 12 Volleyball Courts and Six Badminton Courts.
- C) One Multi-Activity Court/Gym that is capable of hosting indoor soccer, in-line hockey, and three courts convertible for basketball, volleyball and tennis.
- D) Outdoor Facilities include six tennis courts and “play fields” for soccer, football and softball.

### C

#### AVAILABILITY OF FACILITIES:

The use of Kansas State University facilities to outside groups is managed by Recreational Services. Scheduling and rental fees are based on a four tiered priority system, as follows.

- Tier 1: Recreational Services Sponsored Events.
- Tier 2: OSAS registered organizations.
- Tier 3: K-State Departments.
- Tier 4: Non-university organizations.

Non-university groups must also have proof of liability insurance, which is usually provided by United States Olympic Committee (USOC) governing bodies and most reputable sports event rights holders when hosting a sanctioned event.

#### Memorial Stadium:

Originally built in 1922, this historic facility is now home to the Purple Masque Theater and Welcome Center. Several sport clubs (soccer, MCLA lacrosse and rugby) use the turf field, which originally accommodated more than 17,000 spectators.

### D

#### RECRUITING & HOSTING BARRIERS

Two primary issues have the potential to hamper MKCVB’s recruiting and hosting potential. First and foremost is access to both Kansas State’s Intercollegiate and Recreational Sports facilities. Second, facility rental costs may in some cases be expensive when compared to the competition. VSM believes both obstacles are not insurmountable, but very problematic when recruiting and scheduling Kansas State’s facilities.



## SECTION 4: CREATING THE MATCH AND DRIVING DEMAND

Securing and successfully hosting sporting events demands much more than submitting bids and “hoping they will come”. The foundation of successful sports initiatives is based on numerous factors, in addition to the necessary quantity and quality of facilities. Successful sports tourism destinations must create a healthy balance between two main factors, supply and demand. Section 3 identified Manhattan’s marketable competition facilities (supply), while Section 4 addresses the demand side of the equation.

Sports demand trends are fairly obvious in some sports disciplines and regions of the country, not so much in others. It’s important to consider several factors when targeting specific sports, including sport discipline trends over time (growing or declining), quantity of participants, participation rates (core vs. recreational/casual), local participation trends, local sports organization’s event management expertise and a plethora of other factors. VSM has identified several sports tourism success factors and sports disciplines that we believe provide a good “match” for Manhattan, now and/or in the future. Understanding trends and success factors will also assist in making wise capital investments (facility enhancements and development) that benefit both local citizens and the tourism industry.





## A. SPORTS INDUSTRY TRENDS:

Overall sports participation in the United States has fluctuated over the last few years, with 2015 showing a modest increase. Participation increases of more than 4% in several team sports demonstrates a very favorable trend, specifically in the sports of baseball, cheerleading, flag and tackle football, ice hockey, indoor soccer, lacrosse, rugby and competitive swimming.

Generational participation rates are also important to understand. For example, Boomers are more likely to participate in fitness activities than any other category. Gen Z has the highest participation rates in both outdoor and the team sports categories. Millennials have the highest participation rates in the water sports segment...and so on.

## B. THE BEST MATCH AND GENERATING MAXIMUM IMPACT:

VSM recommends that MKCVB focus on both “Volume” and “Yield” when targeting specific sports and events.

1. Volume refers to the quantity of teams, participants and spectators.
2. Yield refers to the average spend of participants and spectators.
3. The Age and Gender of attendees factor in to the total impact that specific sports have on a destination.

## C. LOCAL PARTICIPATION, LEAGUES AND OFFICIALS

The diagram (right) represents a pyramid of participation levels and sporting events, from the local level to the top tier, or global. Moving from the bottom to the top, the quantity of participants gets smaller, the qualification process for participants becomes more difficult, and the prestige of the events increasingly higher. All United States Olympic Committee (USOC) governing bodies, sports event organizations and manufacturers strive to grow the base tier, that’s where the money is and the future success of the sports industry rests.

Successful sports tourism initiatives require human resources, including dedicated sports marketing staff and local sports personnel who are well connected to the sports industry, and who have the ability to work in partnership with event organizers, local leagues, experts, officials and related stakeholders. Local participants, leagues, clubs and officials are a critical component for recruiting and hosting events; it’s very difficult to be successful without them.

### THE SPORTS PARTICIPATION AND EVENT PYRAMID



With the exception of Kansas State’s major events, virtually all of Manhattan’s sports tourism events are at the Local and Regional levels, it’s what matches the area’s current infrastructure and it’s a stepping stone for future growth, but growth can only be achieved by growing the base, which includes all local stakeholders.

## D. MANHATTAN'S PRIMARY SPORTS SEGMENTS:

Targeting the right markets for MKCVB is critical, and for the most part a function of available facilities as outlined in Section 2. The following sports disciplines (target markets) represent Manhattan's best opportunities for recruiting and hosting championship events. There are a number of other opportunities, however, that exist in the sports event marketplace.

*The following is not an exhaustive summary, but rather it identifies those sports where sufficient publicly owned or potentially accessible facilities exist for MKCVB to generate overnight stays and economic impact.*

01



### BASEBALL MARKET SEGMENT:

Manhattan has the potential to capture a larger portion of this market segment. America's pastime still has a massive number of total participants (13.7 million). Numerous baseball organizations are in the marketplace looking to expand their footprint and total participants. The youth baseball market is also a very lucrative economic powerhouse, with the Average Travel Party Size, per player (family, friends and/or support staff), of 3.76 people.

### A.

A judicious evaluation of baseball organizations is warranted prior to recruiting efforts, as all organizations don't share the same level of operational expertise, available events for recruiting, and core values. MKCVB will most likely find the greatest success working with local leagues, officials, board members, competitive travel teams and local organizations that have connections to their respective governing bodies.

### B.

Over the past five years Manhattan has hosted numerous baseball events through organizations including USSSA, American Legion, Manhattan Baseball Association and the Kansas State High School Activities Association, to name a few. **Manhattan has the industry connections, local leagues and experience to become a much larger player in this market...if the quality and quantity of fields were available.**

## C.

**Currently, Manhattan's portfolio of multi-field baseball facilities is not well suited for large competitive events, primarily due to the lack of competition fields (quantity) in one location, (i.e. critical mass or clusters).** There are tournament quality youth baseball fields in Manhattan at the Eisenhower (3 fields) and Frank Anneberg (6) parks. The Lud Fiser Complex (5), City Park (3) and Optimist Park (5) are not suitable for tournaments, and are sub-standard even for league play. Lacking consistent field dimensions based on age groups makes recruiting and hosting tournaments very challenging.

Manhattan has hosted small to medium sized events over the years. However, it's virtually cost prohibitive for event rights holders to bring a tournament for ages 13 and up with more than 40 teams to the area. Most of the area's softball facilities, with temporary fencing and portable pitching mounds, can serve as host venues for youth age groups 12 years old and younger.

Travel baseball teams and events (e.g. AAU) have lost some popularity in recent years because of the trend towards showcase style events for older youth groups. Manhattan has worked with a variety of youth baseball organizations in recent years, including KSHSAA, Pastime, Mid America, Midwest Sports Productions and All American Events, most attracting 20 teams or less. Other options worth considering include Perfect Game AAU, Baseball Factory and USSSA. However, due to facility limitations, VSM recommends that MKCVB focus its resources on ages 12 and younger, as their travel party size is larger and the availability of older youth fields in one location is currently very limited.

## D.

The following is basic youth baseball field dimension guide, mindful that these dimensions may vary depending on the baseball organization and regional guidelines. Fields can usually be sized down for younger age groups, but never up.

### **Baseball Field Dimensions by Age Group:**

- **8U – 10U:** 46' pitching distance, 60' baseline. Preferable fence distance is 225' to Center and 175' down the Left/Right field lines.
- **12U:** 50' pitching distance, 70' baseline. Preferable fence distance is 250' to Center and 200' down the Left/Right field lines.
- **14U:** These distances vary, as many 14U play up to high school distance but a few organizations use the following 54' pitching distance and 80' baseline. Preferable fence distance is 300' to center and 250' down the Left/Right field lines.
- **High School & College:** 60'-6" pitching distance, 90' baseline. Preferable fence distance is 400' to center and 320' down the Left/Right field lines

## E.

To some, baseball and softball venues should be kept separate and distinct; VSM agrees. However, some facilities throughout the country are hosting large youth baseball tournaments at softball complexes with skinned infields and portable pitching mounds, primarily out of necessity. Such is the case in Manhattan, which puts the area “one down’ compared to the competition. The biggest problems with this strategy are field deterioration from overuse, scheduling issues, availability, and organizational conflicts. These issues and a severe baseball facility deficit (quality and quantity) have kept Manhattan from meeting even league needs and realizing its full potential in this sports market segment.

## F.

In light of the sport’s size, local participation levels, officials and leagues, youth baseball could have a much greater impact on the community (social and economic) than it currently has. With improvements to the Lud Fiser, City, and Optimist parks, Manhattan could effectively compete in the youth baseball market segment with an attractive potential return on investment (ROI), but only if upgrades are made to existing facilities, or preferably a new wagon wheel style complex with a minimum of five fields (cluster), were constructed.



In youth sports, the economic impact per player is greater than that of adult sports, and female sports, such as fast pitch softball are greater than male youth sports such as baseball. **Softball also has a very attractive Average Travel Party Size of 3.97 per player,** which makes this sport an attractive target market and excellent match for Manhattan.

## A.

Softball governing bodies and organizations are plentiful, which provides destination marketing organizations with leverage in the marketplace. In addition, the sport of softball is a lifetime sport (cradle to grave) with a healthy gender balance of male and female athletes. For example, Senior Softball USA has age divisions from 40 years old through 80+. The softball market is simply a very good match for Manhattan.

## B.

The Frank Anneberg Park “cluster” of softball fields makes Manhattan somewhat competitive in the softball event marketplace. This six field softball cluster is the only viable adult slow-pitch venue in Manhattan. The quantity of fields limits weekend adult slowpitch tournaments to a maximum of 40 teams.



**C.** One of the keys to attracting tournaments and developing this market is growing local league play. Virtually all governing bodies are membership driven. They strive to grow their membership bases; more members = more revenue. A common problem in softball, when placing tournaments in destinations, is finding and paying officials, especially their travel costs. If the local leagues are sanctioned by a rights holder (e.g. ASA, ISA, NSA, etc.) there will be officials living in that destination and usually a pool of teams that will enter the event; collectively enhancing the bottom line for the rights holder.

**E.** Successful 40 team softball events, over two days, can generate approximately \$415,000, and a three day championship can generate approximately \$620,000, on average.

**G.** VSM recommends a much stronger push into this sport discipline. Manhattan Parks and Recreation already has relationships with two large governing bodies, ASA and USSSA (Manhattan Parks and Rec Department currently sanctions their league play through USSSA). Other rights holder options also exist, including ISA, NSA, SSUSA and many more who are attempting to grow their respective organizations and tournament bases. VSM recently spoke with the **Independent Softball Association's (ISA)** CEO, Mike Caldwell and the **National Softball Association's (NSA)** owner, Bill Horton, about softball in Manhattan. Both organizations are interested in working with MKCVB, but they have some questions. This may initially be an issue with USSSA, who could very well pull some events from Manhattan, very doubtful, but a possibility. Regardless, VSM recommends that MKCVB contact these associations and commence discussions, analyze the risk vs. rewards and make a well informed strategic business decision.

**D.** For girls fastpitch softball, the six fields at Frank Anneberg, along with infrastructure upgrades at Lud Fiser and City Park(s) would create a very competitive infrastructure base, capable of attracting youth softball championship events.

**F. Facility Dimensions:** A basic guide to softball facility dimensions for refurbishment and development purposes.

**Girls Fastpitch Softball:**

- 8U & 10U: 35' pitching distance, 60' baseline, 180' fence preferable (can play on 200'- 220').
- 12U: 40' pitching distance, 60' baseline, 200' fence.
- 14U & 16U: 43' pitching distance, 60' baseline, 200'- 220' fence.

**Adult Slowpitch:**

- Standard/Lower Divisions: 50' pitching distance, 65' baseline, 300'-315' fence.
- Major Divisions: 53' pitching distance, 80' baseline, 300'– 325' fence.
- Senior Divisions: 50' pitching distance, 65'– 70' baseline (varies with governing body or association), 300' fence.

**H.** Similar to baseball, Manhattan's public facilities are in need of a major overhaul. Without facility improvements or new development, MKCVB will find it increasingly difficult to recruit and host events at these facilities, and will inevitably realize missed opportunities and a reduction in overnight stays and economic impact.





### OUTDOOR FIELD SPORTS (RECTANGLES):

As previously mentioned, VSM recommends the term “multi-purpose” fields, rather than the sport specific term “soccer fields”, as multi-purpose more accurately describes the facility’s ability to host a wide variety of field sports and creates an inclusive image for all sports disciplines. The following sports are a good match for Manhattan for several reasons, as noted below, to host events in field sports such as soccer, rugby, lacrosse, field hockey and football (youth, flag and touch).

**A. Impact:** Field Hockey, Football, Lacrosse, Rugby and Soccer fields can accommodate similar numbers of teams during a weekend event. On “average”, 40 traditional size field sports teams have the capacity to generate approximately \$650,000 in economic impact during a normal weekend event. Football numbers vary wildly depending on the playing format, i.e. touch, flag or tackle.

**B. Growth and Expansion:** A popular trend in several competitive sports disciplines, including field sports, has been to expand their event offerings. Rugby added a 7 vs. 7 team format in the Rio Olympic Games. Football has increased their portfolio by adding 7 vs 7 competitions. Soccer has implemented several varieties of play, including 3 vs 3, 4 vs 4 and 7 vs 7. These options bode well for Manhattan with its current field sports facility deficit, which limits the area’s ability to host larger traditional format events.

**C. Field Hockey:** USA Field Hockey, based in Colorado Springs, is the USOC’s official governing body of the sport. Its rising popularity is growing mainly on the east coast, but spreading nationally, mainly at educational institutions but also through the growing popularity of league play.

USA Field Hockey, like most sports organizations, has a grass roots development program that may be of interest to Manhattan’s parks and recreation department, which provides an opportunity to establish a foundation for hosting tournament play. The program FUNdamental Field Hockey is a youth development initiative designed to expose field hockey to thousands of children nationwide by providing free field hockey equipment and emphasizing fun physical activity.

Total participation numbers are relatively low at 3.5 million and the Average Travel Party Size is a modest 2.2. However, its growth rate has been extraordinary, growing more than 6% over the last five years. This market, although small, is looking to expand and is a potential target market for Manhattan in the future.

**D. Football (Youth, Flag and Touch):** Football is a uniquely American sport, but is not a member of the United States Olympic Committee, nor does it have a unified or recognized governance system. Youth and high school programs are abundant, but primarily organized at the local, state and regional levels.

1) AAU has an active program and American Youth Football (AYF) is a 501(c) (3) non-profit corporation that hosts various educational and tournament programs nationwide.

2) Pop Warner Football is one of the oldest youth football organizations in the country (1929), and generally considered one of the most reputable. This 501(c) (3) organization has academic requirements and a reputation for quality leagues and events. They have presence in 42 states.

3) United States Flag and Touch Football League is based is just one example of many non-profit and/or private organizations that offer league play and tournaments. Others have come and gone over the years like Let It Fly, but the lack of an official sanctioning body limits the predictability and reliability of this market segment. There are event hosting opportunities in this sport, but VSM advises MKCVB to proceed with caution when dealing with organizations in this segment.

**E. Lacrosse:** Lacrosse is one of the country's fastest growing sports market segments. USA Lacrosse is based in Colorado Springs and is the USOC's official governing body of the sport.

The rising popularity of this sport is growing mainly on the east coast, but spreading rapidly, in large part at educational institutions and through league play. Total participation numbers are relatively low at just above two million. This market is relatively small in the Midwest but still capable of generating modest returns in the future.

**F. Rugby:** Rugby is an Olympic sport with the official USOC governing body, USA Rugby, based in Lafayette, Colorado. Rugby's numbers have shown steady growth in the last few years, having reached an all-time high in 2015 of 1.3 million participants. The Average Travel Party Size is a relatively low 1.06.

Field dimensions, including goalposts, are a bit different than football and soccer, but a small investment in equipment and a willingness to embrace this discipline has the potential to provide future returns for Manhattan. This market is currently small in Kansas and VSM not recommending that it become a top development priority.

**G. Soccer:** It was only a matter of time before the global popularity of soccer penetrated the American sports industry. There are multiple reasons for the growth and popularity of soccer in the U.S. and industry forecasts indicate that this growth will continue for the foreseeable future, which is one of the reasons that this sport is a good match for Manhattan.

1) U.S. Soccer has invested heavily in its youth and development programs, which has broadened its participatory base and assured a strong future. For example, U.S. Soccer's "Soccer Across America" is an initiative with a goal on making soccer available to lower-income children in underserved communities.

2) The sport's total participation in the U.S. exceeds 12.5 million and has an attractive Average Travel Party Size of 2.88 people per athlete.

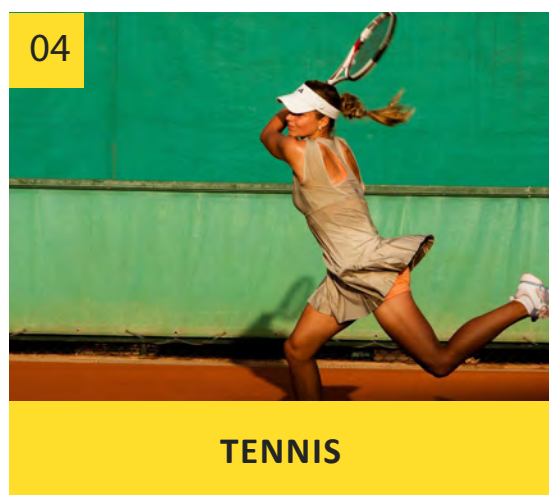
3) U.S. Soccer is the official governing body in the U.S. The Kansas State Youth Soccer Association, Inc. is the sanctioning body for youth soccer in the State of Kansas. The State Association's office is located in Olathe. Kansas Youth Soccer's membership includes more than 25,000 youth players, 1,600 active coaches, 1,600 referees and thousands of volunteers through its network of over 30 affiliate member leagues/clubs statewide.

4) Growth at the local level and the potential for powerful economic returns from competitive events warrant an investment in facility enhancement and development in Manhattan. **VSM is recommending that the soccer market segment should be one of Manhattan's top recruiting and facility development priorities, now and in the future.** 27

## H. Multi-purpose Field Deficit:

With only one public Competition Multipurpose facility in Manhattan (Frank Anneberg Park), the area has a severe facility deficit. There are also issues with limited access to the complex for both soccer and non-soccer sports. Unfortunately this impacts opportunities for citizens, league play and competitive events, which severely limits Manhattan's sports tourism revenue generating potential.

Frank Anneberg Park, Manhattan's only public tournament capable complex features six multi-purpose fields, which can also be converted into multiple youth fields and a variety of configurations, as needed. This complex has tournament quality fields and outstanding amenities; essentially positioning this facility as Manhattan's primary competitive venue for a variety of field sports disciplines. Access to Kansas State's intercollegiate and recreation facilities, even for championship rounds, would bolster MKCVB's recruiting efforts but not alleviate the need for a larger quantity of fields.



The quantity and quality of public tennis facilities does not position Manhattan as a competitive tennis event destination. Kansas State's intercollegiate and recreational tennis courts are excellent and could easily handle tournament competition, if accessible. There are also courts at City Park, CiCo Park and four at the high school, none of which is competition capable.

**A.** The United States Tennis Association (USTA) is the national governing body of the sport. USTA also has a long history of program development and support in local communities.

**B.** The tennis market is generally more affluent and willing to travel than many other sports disciplines. The sport's total participation in the U.S. exceeds 17 million, but has leveled off in the last few years. The Average Travel Party Size is an attractive 3.11 people per athlete.

**C.** There is also a relatively high percentage of females who play tennis, particularly youth; making an investment in growing, or recruiting, new events a worthwhile strategy. With the tennis industry's ongoing push to grow the sport's base, this is a market worth developing beyond the current level. USTA has developed several programs to help communities like Manhattan grow their grass roots and tournament base, including Community Tennis Associations (CTA), school programs, event sanctioning assistance and the National Junior Tennis and Learning initiative.





## INDOOR SPORTS MARKET:

The indoor sports market in light of Manhattan's lack of public facilities is very limited, but access to Kansas State's world class facilities would be a game changer for MKCVB. **Indoor sports represent a very viable opportunity for Manhattan, particularly during periods of lower occupancy.** Additionally, indoor sports virtually eliminate exposure to weather related issues, which are frequently associated with outdoor events, and they can effectively balance MKCVB's event portfolio on a year round basis.

For the most part, gymnasiums and large multi-purpose indoor facilities offer the basic amenities for virtually all competitive indoor sports. Unfortunately, Manhattan has a severe shortage of public facilities, which if present would represent a very marketable asset for the area. Basketball, volleyball, badminton, pickleball, mat sports, dance, cheerleading, gymnastics, martial arts, academic competitions (mind sports like chess, etc.) and a myriad of other indoor competitive events can be hosted at these facilities, in addition to satisfying local programing and league demand.

Diversification in the sports tourism industry is very important; indoor sports provide this opportunity for both local citizens and Manhattan's tourism industry. Unfortunately, in light of the quality and quantity of Manhattan's public indoor venues, there are limited opportunities to recruit or grow impactful events in this market segment. With access to Kansas State's indoor facilities and/or constructing a new fieldhouse (minimum 45,000 square feet of "playing surface"), VSM recommends increasing the percentage of indoor sports in relation to outdoor sports within the organization's portfolio of events.

If the Kansas State facilities become available or a new facility is built, VSM recommends targeting the following sports based on recruiting availability, tournament amenities, floor space flexibility, local sports participation levels, available organizers and officials, growth trends, potential to grow the sport locally in Manhattan and potential economic impact/ROI (current or future).



## A. BADMINTON:

Often viewed as a recreational sport, badminton is also a highly competitive Olympic sport. The official governing body, USA Badminton, is based in Colorado Springs. The sport's total participation in the U.S. exceeds 7 million, but has experienced some small declines in the last few years. The Average Travel Party Size is a relatively low 1.33.



## B. BASKETBALL:

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Invented in the U.S. by Dr. James Naismith, basketball is one of the country's most popular recreational and competitive sports. With more than 23 million participants in the country, the Average Travel Party Size is one of the lowest at .77 per athlete, but female players will more than double their male counterparts Average Travel Party Size, and their per athlete spend, as well.

USA Basketball is the USOC's official governing body, but is primarily responsible for fielding the U.S. team for international competitions and the Olympics. There are several well run youth organizations throughout the country, including Youth Basketball of America, AAU, Five Star and USSSA. Local, state and national tournaments are abundant and represent a viable target market.



## C. CHEERLEADING:

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Competitive cheerleading organizations and events are numerous, but the sport lacks a recognized official governing body, and recruiting efforts must use a dash of discretion during the process.

Cheerleading has grown almost 3% over the last five years and boasts more than 3.5 million participants in the U.S. However, the average spend per registered athlete is double that of most male sports, and its Average Travel Party Size is an industry leading 4.15. Cheerleading is an attractive target segment for Manhattan, but options are limited due to access issues at Kansas State, and there isn't a competition capable public indoor facility. There are some possibilities, depending on the rights holder (organization), at outdoor venues such as Bishop Stadium.



## D. GYMNASTICS:

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Similar to most high profile Olympic sports, participation ebbs and flows every four years. There are more than 4.6 million participants nationwide and as a very powerful Average Travel Party Size of 3.97 per registered athlete.

Working with local clubs, like Manhattan Gymnastics Academy, is practically the only method of securing youth gymnastics events for two main reasons. First, gymnastics equipment is very specialized and expensive. Second, technical expertise and contacts with decision makers is best made by affiliates of USA Gymnastics.



## E. SWIMMING, DIVING AND SYNCHRONIZED SWIMMING:

Aquatic sports that are held outdoors have a very limited season in northern states, but Manhattan has had some success hosting various swimming events like the Manhattan Marlins Swim Team's Little Apple and Monster swim meets. To consistently host swimming events, access to an indoor facility is critical primarily due to weather and seasonal factors. Swimming, diving and synchronized swimming all require different types of infrastructure, as well.

Almost three million people currently swim on a competitive team and though most are youth, swimming is a lifetime sport with thousands of adults competing in the Masters or senior divisions. Youth competitive swimmers remain the ideal target market, as they have a very strong Average Travel Party Size of 3.98; divers are a bit less at 2.94 and synchronized swimmers at 3.01.



## F. RACQUETBALL/HANDBALL:

With just over 3.8 million participants in the U.S., and a majority in the Midwest and northern states, racquetball has recently experienced a slight drop in participation. The only reason VSM lists these sports is because of the 12 courts at Kansas State's Peters Recreation Complex. The scenario remains the same with the problem of access to facilities, but it's still a potential opportunity for MKCVB.



## G. TABLE TENNIS:

Similar to badminton, table tennis is viewed by many as just a fun recreational sport. That is true, but table tennis is also a very competitive sport. The USOC's official governing body is USA Table Tennis (USATT), which is based in Colorado Springs. 19 million Americans play for recreation and USATT has about 8,100 members. The Average Travel Party Size is a modest 2.76 but the attractiveness of this sport rests with its flexible space/infrastructure requirements. Even small events can generate overnight stays, and recruiting table tennis events is generally pretty straight forward. Unfortunately KSU's sport club is no longer very active. The Douglas Center offers some opportunities, but VSM didn't discover any competitive teams in the area. MKCVB's best approach is to contact USATT.



## H. VOLLEYBALL:

USA Volleyball, based in Colorado Springs, is the USOC's official governing body and sanctions the majority of competitive events in the U.S. However, other organizations around the country host volleyball events, including AAU who hosts the world's largest volleyball event in Orlando, Florida. In Manhattan, Little Apple Volleyball Club and KSU's club program are active in the community and a potential source for leads and event operation assistance.

Indoor volleyball has more than 3.5 million core athletes and almost 6.5 million total participants in the U.S. The Average Travel Party Size is a fairly respectable 2.97 per athlete, and having primarily female participants makes this another potentially very attractive target market.



## ADAPTIVE SPORTS:

This market segment is often overlooked and underserved; 19% of the U.S. population has a disability, roughly 48.9 million people. In 2016, the Paralympics garnered 50 hours of nationwide TV coverage in Rio, on NBC. People's attitude about adaptive athletes and sports have changed dramatically in recent years. This segment has become a viable target market for several reasons.

**A.** Opportunities for disabled athletes to compete is very limited, but the reasons for any destination to become active in this market are numerous, including:

- 1) Adaptive sports drive demand and revenue via athletes, officials, spectators, sponsors, volunteers and support personnel.
- 2) Adaptive athletes need event opportunities, which are not currently abundant. This presents an opportunity for Manhattan.
- 3) Adaptive sports are quickly becoming an important part of the Olympic movement and this affiliation is a very powerful brand and image builder.
- 4) Developing an adaptive sports portfolio and a reputation for hosting adaptive events lays a foundation for growth, particularly as communities become known through social media and word of mouth

**B.** Understanding the athlete and the market is important.

- 1) MKCVB should familiarize itself with the market by researching the United States Olympic Committee's U.S. Paralympics.
- 2) There are several other sports organizations that have adaptive programs for disabled athletes that are not part of the Olympic family.
- 3) Involve adaptive athletes and clubs at the local and state levels during the planning and activation process.
- 4) Involve the local parks and recreation offices to assist the development and event planning process.
- 5) Review available adaptive infrastructure and equipment and ensure that the community is ADA friendly, this applies to accommodations and restaurants, as well.
- 6) Start small and build an event portfolio of successes.





## MISCELLANEOUS OUTDOOR SPORTS SEGMENTS:

There are several sports that have generated economic impact for Manhattan, and in some cases don't require a permanent facility or major infrastructure. Having experienced local sport specific experts, organizers, officials and a track record of hosting events makes the following sports segments worth sustaining and expanding.

### A. Outdoor Sports Industry:

Outdoor Sports as used by VSM in this section mirrors many of those which are tracked and represented by the Outdoor Industry Association (OIA). It does not include outdoor field sports such as baseball, field hockey, lacrosse, rugby and soccer. The correlation between core participants in outdoor sports and competitive events is proven. Outdoor sporting activity, venues and competitive events in the Manhattan area represent attractive opportunities and potential growth for MKCVB. Per capita, participation in the Outdoor sector in the Midwest, including Kansas, is well above average and VSM recommends that MKCVB expand its efforts in this market segment.

1) According to the Outdoor Industry Association, spending on outdoor recreation exceeds the spending on gasoline, household utilities, pharmaceuticals, motor vehicles and parts. Annual spending in the U.S. is more than \$646 billion annually and results in more than \$39 billion in state and local tax revenues.

2) Kansas Outdoor Sports Industry:

- \$7.1 billion in consumer spending in Kansas.
- Results in more than 85,400 jobs.
- \$477 million in state and local tax revenue.
- \$2.0 billion in wages and salaries.

**B. Archery**, both an indoor and outdoor sport, is covered in this section because of the rapid growth of outdoor archery events, which are a better fit for Manhattan due to the lack of indoor facilities.

USA Archery is the USOC's official governing body of the sport and is based in Colorado Springs. However, numerous non-USAA organizations and event rights holders have emerged due to growth in bow hunting, archery in schools programs and the popularity of entertainment industry productions like the Hunger Games.

According to the Archery Trade Association (ATA), participation in archery grew 14% from 2102 to 2014, boosting the number of archers to more than 21.6 million, which is approximately 9.2% of the U.S. adult population. Archers are typically younger, more common in the Midwest and more than 9% shoot in leagues and tournaments. Archery parks are increasingly common in the heart of community recreation centers.

VSM believes archery is an underserved market locally and an excellent target market for Manhattan's sports tourism industry.

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**C. Cycling:** Manhattan and the surrounding area are ideal for recreational and competitive cycling. Cycling has a very distinct advantage over other sports in that the infrastructure needed for both leisure and competitive events is a function of geography and existing transportation infrastructure.

1) Total participation in paved road cycling is more than 38 million people, and core riders exceed 19 million. Off road, or mountain biking, claims it has over eight million participants and a five year annual growth rate of more than 3%.

2) The League of American Bicyclists has recognized Manhattan and Kansas State with the Bronze level distinction, a promotional badge of honor for both entities and an endorsement of the area's potential as a cycling hub. Manhattan is one of only four Kansas communities with this designation. Kansas State was also recognized as the first bicycle friendly university in the State.

3) Manhattan has hosted several races over the past few years, including the Cycle CASA, Wildcat Grand Prix, Yellow Brick Road Ride and the Dirty Little Secret Race. Additional events and growth can be realized in this market segment, including mountain biking. Although, the status of the Kansas Mountain Biking Club is uncertain. However, there are two off road cycling venues in the Manhattan area. The Fancy Creek State Park features a six mile trail and the Big Blue River Trail.

4) USA Cycling (USAC), based in Colorado Springs, is the governing body of the sport and oversees road, track, mountain bike, cyclo-cross and BMX disciplines. USAC's membership is very large for a USOC NGB. In 2015 there were more than 61,000 individual members, and cycling events had an Average Travel Party Size of 1.93. Manhattan has hosted several races over the past few years but additional events and growth can be realized in this market segment.



**D. Disc Sports (Ultimate Frisbee and Disc Golf):** Manhattan has a very active disc sport population. Primarily a leisure recreational activity, the disc golf participation level in Manhattan is relatively high. Manhattan also has three disc golf venues; Warner Park, Fairmont Park, and one out by Tuttle Creek.

1) The sport is governed by the World Flying Disc Federation (WFDF) at the international level. WFDF is responsible for sanctioning world championship and other international flying disc events, and consists of 71 federations in 69 countries. Sport disciplines include flying disc (Frisbee), Ultimate (Grass & Beach), Disc Golf, Freestyle, Guts, and Overall. Flying disc is not an Olympic sport, but is recognized by the International Olympic Committee as a not for profit 501(c) (3) corporation in the state of Colorado.

2) There are other organizations that host disc events and promote the sport throughout the world and the U.S., which provides several options for sports tourism organizations like Manhattan. The State of Kansas has a very active disc golf association, with more than 180 venues and several events being held in the Manhattan area, including the Little Apple Open and the Ice Bowl.

3) The demographics of the sport are fairly diverse, but predominantly male. Due its relatively loose sanctioning structure, VSM advises MKCVB to recruit with caution. The sport has potential as a target market but warrants further investigation.

## **E. Endurance/Running Sports:**

A wide range of endurance races are held in the area, which has proven to generate overnight stays and respectable economic impact. Manhattan is fortunate to have a successful, knowledgeable and well organized running event system in place. In fact, when VSM met with Ben Sigle of the Manhattan Running Company, he stated that “if we had a dedicated course, it would get used a lot”. Two other running supporters, Rod Harms and Doug Sellers, are also knowledgeable advocates for the sport. This level of expertise and support are very powerful assets and a competitive advantage for Manhattan.

**1)** Similar to other sports disciplines, endurance and running sports have morphed into several varieties, distances, and race formats, including non-traditional competitions (obstacle course races that can involve water, mud, paint and fitness components). Endurance/running sports numbers have declined over the last couple of years, after experiencing growth of more than 300% from 1990 to 2013; the biggest drop coming in non-traditional racing events. In 2015, more than 17.1 million participants finished races across the U.S., and interestingly, the majority of those participants were female (57%).

**2)** 5K and half-marathons are the most popular formats, comprising more than 65% of all event finishers (participants). Age segmentation has shown that the 25-44 age group accounts for almost half of all participants. There were more than 30,000 running events held in the U.S. in 2015, with the largest growth in the 10K distance format at roughly 14%.

**3)** In the U.S., running has more participants than baseball, softball and soccer combined. Manhattan has unlimited potential in this market segment, and VSM strongly recommends that a collaborative effort should be a top priority for MKCVB, the city and county to ensure that the area’s human and capital resources are not wasted.

**4)** Warner Park hosts high school meets, and Anneberg Park and Northeast Park also host some running activities, but Manhattan needs dedicated courses. For the benefit of local citizens, businesses and the sports tourism industry, VSM recommends that Manhattan work with these local experts to develop certified 5K, 10K and 15K courses, which will also take the pressure off of using local roads. Furthermore, the lack of a dedicated facility is a community safety issue for local able bodied and adaptive athletes.

## **F. Fishing**

According the Outdoor Industry Association, fishing is one of the country’s most popular leisure sports, with more than 45 million participants. Competitive fishing events are plentiful, but lacking in total participation and spectator numbers, compared to more mainstream sports like baseball and soccer. None the less, fishing events do generate overnight stays. They also have the potential to enhance an area’s image and attract leisure fishing enthusiasts. The following organizations either sponsor and organize events, or are a good resource for event development.

**Bass Anglers Sportsman Society (B.A.S.S.) –  
Nationwide**

**Fishing League Worldwide (FLW) – Nationwide**

**Trout Unlimited – Nationwide (Membership  
skewed toward eastern US and western states)**

**Crappie USA – Nationwide**

**Crappie Masters – Nationwide**

**American Sportfishing Association (Trade  
Organization) – Nationwide**

**International Gamefish Association – Nationwide**

**International Federation of Fly Fishers –  
Nationwide (Membership skewed toward eastern  
US and western states)**

**National Professional Anglers Association –  
Nationwide**

**Walleyes Unlimited**

**The Walleye Federation**

**Northerns Inc.**

**American Bass Association**

**Great Lakes Sport Fishing Council (primarily trout  
and salmon)**



## H. Water Sports

VSM has identified this potential market primarily because of the water bodies in the area, but also because of various clubs and/or athletes that call Manhattan home. Paddle sports are growing in popularity, while motorized or towed water sports like water skiing have declined in participation over the last ten years.

A diverse variety of sports fall into this category, some like water skiing are motorized and others are human powered like canoe/ kayak. Having sufficient water bodies and generating measurable economic impact do not always go hand in hand. It takes much more, including a healthy level of local participants, officials, leagues/clubs and access to competition capable venues.

**1) Paddle Sports:** This segment has enjoyed increasing popularity over the last few years across generational and gender groups. The official governing body of the sport is USA Canoe/Kayak, which is based in Fredericksburg, Virginia. Fortunately hosting paddling events does not require sanctioning by the USOC's governing body to be successful, there's a myriad of non-traditional event opportunities in this sport.

a) The Kansas River and Tuttle Creek Lake are two valuable resources that have hosted competitive events in the past few years. Manhattan Parks and Recreation, for example, hosted Glow Paddle, which attracted 32 participants in year one, and 113 participants in year two...a very favorable trend. There is definitely potential for Manhattan, but primarily through growing the sport locally and then using that foundation to recruit or grow small to medium size events, over time.

b) The Kansas River has been designated a part of the National Water Trail System, which is an asset for Manhattan in the recreational and competitive sports markets. This designation and affiliation with the National Water Trail System can result in promotional support, technical assistance and funding.

**2) Towed Water Sports,** such as traditional three event water skiing, collegiate three event water skiing, wakeboarding, show skiing, kneeboarding, barefoot skiing, hydrofoiling, disabled (adaptive) and ski racing (all nine sport disciplines) are governed by USA Water Ski (USAWS), which is based in Polk City, Florida. USAWS is also an official United States Olympic Committee family member, but not an Olympic Sport; it's a Pan American sport.

a) The sport of water skiing has experienced declining participation numbers for several years, but has been buoyed by the rising popularity of wakeboarding, and more recently cable water parks.

b) Cable water parks are popping up across the country, and driving a new boom in towed water sports. A big part of this new sport's popularity is because people don't need a boat, so it's significantly more affordable, opening the door to thousands of new participants. In addition, cable sports are one of the finalists for inclusion in the 2024 Summer Olympic Games. There are several reputable cable park developers and operators, but Orlando based Aktion Parks has possibly the best business model, operational expertise and reputation in the country. VSM believes that this market is the wave of the future in towed water sports, and worthy of additional research.

c) Opportunities exist in all nine USAWS sports disciplines, but the largest numbers (athletes and spectators) come from show skiing. According to USAWS Executive Director, Bob Crowley, there are a few things that are important for them to place one of their championship events in a destination, including a competition capable water body, a host club with volunteers. USAWS sanctions more than 600 events annually. Their largest national championship event, the Show Ski Nationals, attracts over 1,500 participants and 12,000 spectators over three days in August.

**3) There are also other water based sports like boat racing, fishing, sailing, boardsailing, personal watercraft (e.g. jet skis), and more; they all have potential to drive overnight stays. Each sport is unique and has different event hosting requirements, but what they all have in common is a natural resource, a body of water, which Manhattan has. It's the first and most important requirement for recruiting and hosting any event...no venue, no event.**





## HUMAN RESOURCES:

Having the sufficient quantity and quality of facilities is critically important, but not enough in today's very competitive sports marketplace. Local clubs, sports organizations (public and private) and experienced well connected officials are vital components for a productive sports marketing initiative, as well. MKCVB primarily assists local organizers and does some recruiting, but should become more active in the recruiting business, which VSM addresses later in this document.

**A.** Many local Manhattan organizations and individuals have well established relationships with sanctioning bodies and rights holders, which enhance Manhattan's ability to recruit and host events. This is a very important component when developing a sports tourism destination. VSM found the level of Manhattan's sports organizational base and related experts very good in some sports, marginal in others and non-existent in still others. Overall, Manhattan has marketable strengths and competitive advantage in several sports disciplines, these human resources are an integral part of developing a successful sports initiative.

**B.** Sports tourism initiatives require human resources, including full time sports marketing staff and local sports personnel who are well connected in the sports industry, and who have the ability to work in partnership with event organizers and event rights holders. The quality and quantity of sports facilities should be Manhattan's top priority. Creating the match with event rights holders ranks a very close second, and can rarely be done without a dedicated staff member and well-orchestrated sales and marketing program. These two elements are the two critical success factors for sports tourism initiatives.

**C.** MKCVB, like most CVBs and sports commissions, does not have the operational expertise and connections in all sports and with all event decision makers to be consistently successful in every market segment. Fortunately, MKCVB has done a good job establishing relationships, both in Manhattan (internal) and outside the area (external) with various sports organizations and stakeholders.

**D.** Success in the sports marketing industry has a great deal to do with relationships, not only with event rights holders and governing bodies (clients), but also with managing the local relationships, facilities and support services. **VSM believes MKCVB needs must seriously consider creating a full time position to manage this lucrative market and develop Manhattan's sports tourism potential.**

09



### FOCUS ON FACILITY CLUSTERS:

The assumption that the sheer quantity of sports facilities creates a competitive sports destination is a fallacy, and frequently a trap for newcomers to the sports event marketplace. **For virtually all sports event rights holders, clusters of usable facilities are critically important and can make the difference when awarding an event to competing destinations.**

Economies of scale and operational efficiencies are realized when multiple “playing surfaces” are located under one roof, or when outdoor sports are held at one venue or at facilities in close proximity to one another. Managing multiple sites significantly increases fixed costs for event rights holders. Those costs either become a competitive disadvantage or become the responsibility of the host (MKCVB); ultimately this drives the cost of hosting an event higher. Event rights holders have many choices when selecting a destination; it’s a very competitive market. As such, rights holders will virtually always select a destination that can provide facility clusters which are in close proximity and to support infrastructure like accommodations, restaurants and entertainment.

**As Manhattan looks at the possibility to either enhance or develop new facilities, VSM recommends that area decision makers make it a priority to develop clusters of competition capable facilities (playing surfaces in one location or venue) that match event rights holder’s needs and have the ability to effectively match or exceed the facilities of the competition.**

10



### SPORTS TOURISM COMPETITION

The sports tourism market segment is very competitive in the U.S., including in Kansas. Developing a successful program in Manhattan cannot be done in a vacuum; MKCVB must be mindful of who and what they’re competing against. Topeka, Wichita and Overland Park have outstanding facilities, and they also have sports marketing organizations that recruit events with success. It’s also important to note that their facilities provide world class opportunities for their respective area’s citizens, leagues and clubs.

# Competitive Sports Facilities

## Topeka

### Kansas Expocentre

- 22,400 square foot arena (7,700 seating capacity)
- 44,500 square foot exhibition hall

### Hummer Sports Park

- 6,000 seat football stadium
- Two collegiate baseball fields
- Indoor Olympic-size competition pool
- Two softball fields
- 2,000 seat soccer stadium
- Eight-lane track

### Sunflower Soccer Complex

- 16 Soccer/Multipurpose Fields

### Lake Shawnee Girls Softball Complex

- Four Fields all with lights (200' fences)

### Rueger Park Softball Complex

- Four Fields all with lights (300' fences)

### Felker Softball Complex

- Four fields (no lights)

### Ken Berry Fields

- 11 fields (various dimensions)

### Bettis Family Sports Complex

- Six baseball fields of various sizes all with lights

### Sport Zone

- Six volleyball courts/ Four basketball courts
- Four outdoor multipurpose fields

### Disc Golf (18 Basket Courses)

- Lake Shawnee Disc Golf Course
- Crestview Park Disc Golf Course

## Wichita

### Century II Convention Center

- 190,000 square feet in three halls

### Hartman Arena

- 23,000 square foot arena (7,000 seating capacity)

### INTRUST Bank Arena

- 32,000 square foot arena (15,000 seating capacity) 00 N. Ridge Road

### Two Rivers Youth Softball Complex

- Six Fields, five with lights (200' fences)

### West Urban Little League Complex

- Three full size baseball fields
- Seven youth softball/baseball fields

### Wichita Hoops

- 50,000 square foot indoor facility
- 12 hardwood basketball/volleyball courts

### Wichita Sports Center

- 48,500 square foot indoor facility
- Eight volleyball courts

### Wichita Sports Forum

- 148,000 square foot indoor facility
- Eight volleyball courts
- Six baseball Courts
- Six sand volleyball courts

### YMCA Farha Sports Centers (two locations)

- 16 basketball/volleyball courts

## Overland Park

### Blue Valley Sports Complex

- 24 baseball/softball fields
- 12 soccer/multi-purpose fields

### Mid-America Sports Complex

- 10 softball fields
- 2 baseball fields
- 18 beach volleyball courts

### Mid-America West Sports Complex

- 12 softball fields
- 2 baseball fields
- 18 beach volleyball courts

### 3 and 2 Baseball Complex

- 27 baseball fields of various sizes
- 2 baseball fields
- 18 beach volleyball courts

### Drive5 Sports Center

- 8 basketball courts
- 2 baseball fields
- 18 beach volleyball courts

### Johnson Community College

- 43,000 field house (3 basketball courts)
- 3,500 seat JCCC Gymnasium
- 18 beach volleyball courts

### Overland Park Convention Center

- 60,000 exhibit hall

### Scheels Overland Park Soccer Complex

- 12 soccer fields (synthetic turf)
- 16,000 square foot field house
- 18 beach volleyball courts

### New Century Fieldhouse

- Four basketball courts/Eight volleyball courts

# SECTION 5: MKCVB SPORTS OPERATIONAL ANALYSIS

A review of MKCVB's sports event portfolio from 2011-16 reflects a significant deficit in indoor facilities, insufficient facility clusters for outdoor sports and a clear need for a dedicated sports marketing manager. Manhattan has been involved in some very successful events, and has established a favorable reputation with a few event rights holders. However, **VSM is recommending several modifications to MKCVB's strategic approach and operations.** It will require proactive strategic planning, aggressive recruiting, ongoing performance analysis, facility development and/or access, and activating collaborative partnerships among tourism/sports stakeholders in order to achieve Manhattan's full potential as a sports event destination. **Both competitive and recreational sports represent "primary reasons" for coming to the area!**

## CURRENT STATUS OF SPORTS MARKETING IN MANHATTAN:

1.

**Past Performance:** A review of Manhattan's events from 2011–2016 demonstrates modest success, but there is room for growth. Throughout this document, and as noted in two previous facility studies, the primary obstacle to growing Manhattan's sports industry has been inadequate facilities (quality and quantity). As a result, local citizens are under served and the sports tourism industry is losing out on millions of dollars in potential revenue and jobs. The ratio of local sports participation rates to useable facilities also reflects that imbalance.

As can be seen in the figures below, the ratio of outdoor events to indoor events is skewed. Underlying the low number of indoor sports events is the lack of indoor event capable facilities (quantity and quality). Other reasons include competition from other destinations, low local participation and lack of relationships and connections to event rights holders, as well as host of other issues. There is a need to diversify the organization's portfolio of events and partnerships until such time that access to Kansas State's facilities improves, or a new competition capable indoor complex is built.

2.

**Event Mix and Marketing Analysis:** The total number of events relative to MKCVB budget, for the most part, is at an acceptable level. However, without more details and event performance measurement and metrics, it's extremely difficult to know (with confidence) which events are actually putting heads in beds and producing economic impact.

Table 1 summarizes Manhattan's sporting events by sports segment and year. Table 2 is a national comparison that identifies the organizational type (CVB or Sports Commission) in five annual budget categories. The quantity listed in each cell is the average number of events that were held annually, per organization.

Over the last five years (2011-15), Manhattan has hosted, on average, 33.6 events per year. Although, in 2012 and 2013 the Women's and Men's State Bowling Championships accounted for eight and six separate weekends, respectively. VSM only factored each championship as one event, albeit with significant economic impact for Manhattan.



## Manhattan's Sporting Events 2011-15

Calendar	2011	2012	2013	2014	2015	Average
<b>Outdoor Sports</b>						
Baseball	7	11	4	3	9	6.8
Canoe/Kayak	2	2	0	0	2	1.2
Cycling	2	5	7	4	2	4
Disc Sports	0	0	0	1	0	0.2
<b>Endurance Sports</b>						
Decathlon	1	1	0	0	0	0.4
Triathlon	0	1	1	1	2	1
Running	2	3	4	8	8	5
Fishing	0	0	0	2	1	0.6
Golf	1	3	4	6	3	3.4
In-Line Hockey	0	0	0	1	1	0.4
Soccer	4	3	3	3	4	3.4
<b>Softball</b>						
Track and Field	0	1	0	0	0	0.2
<b>Indoor Sports</b>						
Basketball	1	4	4	2	3	2.8
Bowling	0	8	0	0	6	2.8
Gymnastics	0	0	0	1	1	0.4
Swimming	2	2	2	2	3	2.2
Wrestling	1	2	2	0	2	1.4
<b>Total Events</b>						
	23	46	31	34	47	36.2
<b>Net Events</b>						
	23	39	31	34	41	33.6

## National Event Averages by Budget Category

Budget Category	<\$100K	\$100-250	\$251-500	\$501-1000	>\$1Mill
CVBs	7	26	29	5	45
SportsComm.	53	26	38	25	11

Source: NASC

**Impact of Sports Events:** The impact of sporting events on a destination was covered in Section 2 and 7b of this section, and includes both subjective and objective elements. VSM attempted to calculate the economic impact of Manhattan's sporting events, but due to the lack of critical details we were not able to provide either accurate or a defensible analysis.

**Without post event performance data, it's difficult to measure the true value of an event. Additional metrics should be incorporated, including the following.**

**A.** MKCVB must create and implement a standardized Post Event Performance Analysis and Overview for each event, particularly sponsored events. These reports should include an economic impact analysis and an objective summary, which measures how well the event performed, and then compare those results against other event investments. In addition, the overview should compare how well the event compares to the original performance forecast (i.e. overnight stays, number of attendees, economic impact, ROI, etc.). This information, along with additional data acquired through MKCVB's own surveys and research, should then be used to compare actual results to established event benchmarks and standards. These benchmarks will then become a standard for evaluation, and decisions about whether to recruit and/or sponsor events in the future.

**B.** A sports event organizer which receives any assistance or funding by MKCVB must provide tangible proof of performance, which verifies the cities of origin of all attendees, and if possible spectators. Event organizers understand the numbers game and must be held accountable for projections and actually driving overnight stays and measurable results. If an event is sanctioned by a recognized governing body, which for legal reasons they all should be, then organizers must be responsible for providing the data "prior" to receiving any funds. As the old saying goes, "Trust, but verify". That should simply be standard operating procedure for MKCVB.

**C.** Measuring the Economic Impact of sporting events can be as difficult and/or complex as one desires. The good news is, the process is not as arduous as some claim; for the most part it's relatively straight forward. What it all boils down to is gathering accurate information in a consistent and honest manner, and then calculating the results. Estimating the economic impact of events is simply that, an estimate, and subject to many variables, including the demographics and psychographics of the attendees. There can be a wide variance in actual spend depending on the sport.

1) Two potentially contentious issues should be mentioned. First the average spending per day, per attendee should be determined based on local and regional factors. A local economist, or a survey of surrounding communities' spending figures will get MKCVB fairly close. For example, the Kansas City Sports Commission uses \$152.00 per day per athlete. VSM recommends using the Kansas City figure of \$152 per athlete per day, as it factors in unique sports segment spending such as entry fees. Regional consistency is important when making comparative analysis and recruiting decisions. Secondly, multipliers for calculating indirect, induced and total economic spending have been subject to a significant amount of debate. A good rule of thumb is, do not use or trust anything above 2.0...it is very difficult to defend; credibility and consistency are everything.

2) VSM recommends two credible economic impact models. Both DMAI and NASC are used widely by tourism and sports organizations across the country. They are very similar and will provide a high degree of credibility for MKCVB when measuring and publishing the economic impact of its events.

**D.** VSM recommends that a formal agreement with event rights holders becomes standard procedure before hosting any event, which clearly spells out what is expected from the organizer in exchange for financial or other consideration provided by MKCVB. What's important is the total return on investment (per event) as compared to other events or opportunities. VSM also highly recommends that MKCVB develop an annual performance overview and comparative analysis.

**E. Performance Measures and Metrics:** MKCVB's event measurement techniques and performance metrics must be reviewed and modified as soon as possible. VSM recommends establishing a strategic approach that targets the right market segments and events, in addition to conducting thorough pre and post event analysis. This is a critical step in growing an effective and efficient sports initiative.

**F.** MKCVB should also consider focusing on increasing total direct spending by sports tourists and ultimately get them in front of Manhattan cash registers; that's a primary goal!!!

**G. Moreover, measuring anything less than total direct spending understates the true impact of sporting events and significantly understates the contribution that MKCVB and the tourism industry have on the Manhattan economy.** MKCVB's current economic impact model is dated and an alternative should be considered. MKCVB has been using a figure of \$100 per participant per day as an average daily expenditure. Regardless of the source of the average daily spend, it's critically important for MKCVB's image and credibility to rely on a trustworthy expenditure figure that can be defended with research.

Caution must always be exercised when calculating economic impact so as not to overstate the facts.

## 4.

### Randall Travel Marketing (RTM) Destination Analysis:

VSM reviewed RTM's research and found the quality methodology outstanding. The Report also confirmed measurable economic impact from the sports market segment. Arguably many of the "Tourists" could have been attending Kansas State sports events, or possibly participating in leisure sporting activities. Other salient findings include:

**A.** Responses to the "Future Market Segments to Target for MKCVB Sales Priorities" section rated sports as a viable opportunity for future business. This data confirms that the lodging industry is realizing that sports is a market segment that has additional potential beyond current levels.

**B.** The Report's findings, relative to occupancy percentages, also showed that December and January have traditionally been the two slowest months for Manhattan's lodging industry. This data points to an opportunity for MKCVB, and the tourism industry, to utilize sports as a strategy for putting heads in beds during traditionally slower tourism periods. Most outdoor sports events at this time of the year have slowed dramatically, or even stopped all together. A concerted recruiting effort that targets the "Indoor Sports" segment would generate tangible results for Manhattan's tourism industry, but that will only happen if access to Kansas State's facilities is granted or a new indoor facility is built.

## 5.

### MKCVB Marketing Plan and Budget:

Similar to many CVB's who have ventured into the sports market, MKCVB does not have a formal sports marketing plan or line item budget. However, to capture a greater piece of this market segment, a detailed strategic plan and financial resources are needed. VSM recommends that MKCVB develop a formal "Sports Marketing Plan", which clearly outlines the program's goals, objectives, core strategies, tactics and the resources needed for successful implementation. More specifically, VSM suggests the following:

**A.** MKCVB should adopt a sports specific mission statement and primary objectives that are directly aligned with MKCVB's mission statement, goals and objectives. The sports market is an important segment for Manhattan that produces significant and verifiable results, and as such requires a formal plan to achieve greater results in the future.



**B.** Establishing measurable goals and objectives should be done on an annual basis, particularly as the marketplace, competition and the dynamics of Manhattan’s tourism initiative evolve over time. A comprehensive and detailed outline of supporting strategies and tactics should clearly identify the methods for achieving the goals and objectives in MKCVB’s sports marketing plan.

**C.** Annual Strategic Planning Retreat: VSM would also like to see MKCVB establish an annual planning retreat that identifies key target markets, opportunities, goals and objectives for the current and future years. A diverse cross section of tourism and sports industry stakeholders should be involved, including the Manhattan Sports Council. The retreat must reinforce MKCVB’s mission and align all efforts towards that goal. Identify potential event opportunities and what resources will be needed to accomplish those goals. Secure support and accountability from local stakeholders. The Sports Council could definitely serve a greater advisory and support role than is currently being performed.

**D.** Budget, Staffing and Fiscal Accountability are areas that should be priority to ensure that MKCVB targets, recruits and hosts events that produce the highest ROI and achieves organizational objectives. Currently, Manhattan sports events are measured, but to sustain an effective and efficient program more should be done, including the following.

**1) Budget:** An effective and competitive sports marketing program will require financial resources and a dedicated budget. Nationally, 27% of sports tourism organizations have a budget of \$100,000 or less, and 21% have budgets between \$101,000 and \$250,000; roughly half of U.S. sports tourism organizations.

**2) Staffing:** Currently, one staff member (Marcia) researches potential events, markets MKCVB, recruits and/or bids on events and then attempts to provide the organization with “world class” service, this in addition to her other sales responsibilities. A full time sports marketing manager is needed.





- VSM recommends that MKCVB address this need as soon as possible. In addition to one full time staff person, MKCVB may want to consider recruiting university sport management, marketing or recreation majors to assist with special events, research and various projects.

- VSM also recommends that MKCVB consider assigning one staff person to work with the sports manager during the recruiting/sales process, and then be responsible for activating the relationship at the local level. This also allows (frees up) the sports manager to focus on recruiting and relationship building. The position could also serve a similar capacity for meetings, conventions and other special events. Fundamentally this will ensure a higher level of customer service and a seamless transition for the client. Responsibilities should include securing venues, pre and post event analysis, partnership (sponsorship) development, event promotions, client customer service and general event operations.

**3) Fiscal Accountability:** VSM recommends a creating a line item for sports, including a Sponsored Special Events section that identifies each event by sports discipline. “All” costs (bid fee, venue rental, hotel for officials, portable toilets, banquets, etc.) associated with hosting the event should be summed and allocated as one line item, sans recruiting costs. This provides for more accurate accounting of all event expenses and an objective comparison and accurate determination of ROI. Secondly, create a “Sales and Recruiting” line item, which includes all travel, business development, FAM tours, sales and recruiting related line items.

- The same principle applies to maintaining an effective cost benefit analysis for events. Accountability and credibility for investing in sporting events will pay big dividends in the future, particularly when analyzing opportunity costs and answering questions from tourism stakeholders or the media. A detailed line item budget should be utilized for all events hosted by MKCVB.

- Before considering submitting “any” bid for a sports event, develop a detailed proforma of realistic revenues, expenses and projected ROI. This, again, should be standard operating procedure.

## 6.

**Prevent Leakages:** VSM believes MKCVB should be cognizant of potential losses in overnight stays and revenue due to one day events and rights holders who are more interested in the quantity of participants rather than quality of attendees (i.e. overnight visitors and visitor yield or spend). After discussing this issue with staff, it’s questionable whether some teams and spectators are spending the night while attending some events. It’s frequently the case for event rights holders to focus their efforts on generating revenue but “not” on driving overnight stays for the tourism industry, regardless if they’re for profit or non-profits. Consequently they target local/ regional sports teams and/or individuals who can easily drive to the event, and return home for the evening. This has become very problematic for many DMO’s who sponsor events that simply don’t stimulate the local tourism economy, compared to teams from outside the area. **This is why VSM recommends that MKCVB focus its efforts on increasing both the volume and yield of event attendees.**

# 7.

A priority for MKCVB must also be developing and sustaining partnerships with event rights holders and organizations from “alternative sports disciplines”, which will reduce risk; a diverse portfolio of events is a prudent investment (i.e. “Don’t put all your eggs in one basket”). Partnering and maintaining relationships with a diverse portfolio of sports organizers and their respective events will lower risk and strengthen the organization’s long term potential.

**A.** Reducing risk also means that; MKCVB must recruit more events from a wider variety of sports disciplines that provide an acceptable return on investment.

**B.** VSM recommends that MKCVB establish a formal Event Recruiting Priorities Checklist that guides its decisions when targeting, recruiting and sponsoring special events, including the following:

## Economic Benefits:

Estimate the total projected economic benefits from out of county attendees, participants, officials, and spectators that stay overnight. This should be MKCVB’s top priority! The total economic benefit and return on investment should be weighted most heavily.

## Dates of Events:

Greater consideration should be given to events that are held during periods of lower occupancy such as December and January.

## Duration of the Event:

The number of event days is important, primarily due to the higher probability for increasing overnight stays in Manhattan. Essentially, the more days, or overnight stays, the greater the economic benefit. Also consideration should be given to an event’s potential as an extended getaway or mini-vacation for participants and spectators. Usually, the further attendees travel to participate in an event, the greater the probability that they will extend their stays.

## Demographics/ Psychographics of Attendees & Spectators:

### A) Potential Participation in Other Activities -

Consideration should be given to participants that have a higher probability of engaging in other activities during their stay in Manhattan.

### B) Discretionary Income-

The economic status of participants and their disposable income affect overall economic benefits and potential for repeat visits.

## Potential for Future Events:

Many events organizers also have similar or related events that can be held in Manhattan. Thus, partnering with these types of organizations can potentially lead to other events in the future.

## Market Segments:

Diversification is important. Putting all of MKCVB’s eggs in one basket increases risk and reduces opportunities for growth. It’s important to build a resume of special events for Manhattan that establish breadth as well as depth.

**When deciding on potential recruiting targets, it’s important to remember that all decisions must be made with the primary objective of increasing overnight stays in Manhattan and enhancing the bottom line of the area’s tourism industry.**

**Sales and Recruiting:** For the most part MKCVB's sales and recruiting efforts have been limited, and in many cases restricted due to inadequate facilities, access issues and funding. Mindful that in light of the resources at their disposal, the MKCVB staff has performed very well. At this time, VSM suggests that MKCVB also consider recruiting alternative sports and events. This is an effective strategy for generating cash flow for the tourism industry during slower times of the year. This, of course, will mean an adjustment in strategy and a reallocation of time and resources. Targeted sports segments and organizations must be a good match for Manhattan's infrastructure and resources, but also for the community as a whole. VSM also recommends the following segments (not exclusively sports) for recruiting consideration.

**A. Sports Clinics, Conferences, Meetings and Workshops:** In total, the "sports industry" (sports equipment manufacturers, sales and marketing organizations, national governing bodies, event rights holders, etc.) all conduct meetings, conferences, conventions and related business activities that generate overnight stays. Additional benefits will accrue for MKCVB, including access to qualified decision makers while hosting these types of activities at area facilities. There is a complementary effect between sports organizations, manufacturers, conferences, clinics, conventions and related activities. MKCVB has an enviable reputation as a meeting and conference destination; accommodation statistics prove that. Manhattan should develop a strategy to capture this potential market; MKCVB staff has the skill set and expertise in the meetings and conventions segment to be effective in this target market.

**B. Outdoor Sports:** Alternative sports disciplines such as lacrosse, field hockey, cycling (mountain biking and road), track and field, triathlons, disc golf, extreme sports, band, drum and bugle corps, rugby, radio controlled aviation, archery and a plethora of field sports - are all viable target markets and an excellent match for Manhattan's existing facilities and infrastructure. Rugby and lacrosse, for example, represent two of the fastest growing sports in the country. Additionally, Manhattan is in relatively close proximity to a core cluster of participants and organizations in these two sports along the east coast. Manhattan's disc golf courses are very good and an excellent example of existing infrastructure in an alternative sport.

**C. Indoor Sports:** VSM recommends a much stronger effort on recruiting sports disciplines such as martial arts, judo, cheerleading, dance, badminton, wrestling, fencing, volleyball and gymnastics, as results producing additions to MKCVB's current portfolio of events, either at Kansas State or when a new indoor complex is constructed.

**D. Female Athletes:** As a result of Title IX and growth in female sports, the amount of female youth events has increased in recent years. When faced with a choice between male and female youth sporting events, the latter represents the optimum choice for MKCVB. On average, female athletes spend more money and bring a larger number of "other" attendees (Average Party Size) with them compared to boys.

**E. Home Grown Events:** Essentially, home grown events are those that MKCVB can create, preferably in partnership with local clubs and leagues, or with governing bodies, associations and/or related organizations. MKCVB should ultimately own the rights, control the timing and format of these special events. This strategy represents an opportunity for growth and has the capability of generating significant numbers of overnight stays. The advantages of this "home grown" approach are numerous and include, no "bid fees", placement at slower tourism times, event longevity, lower costs and community buy in. Numerous sports organizations and clubs in Manhattan have the ability to provide the technical expertise, volunteers, contacts with officials and potential participants.

**F. Recreational and Leisure Sports Travelers:** Although this market segment is outside of the scope of this analysis, VSM recommends further research and development. For Manhattan, potential markets include: cycling, golf, boating, geocaching, hiking, hunting, fishing, water skiing, bird watching and various forms of nature based tourism. Overall, recreational outdoor activities represent a tremendous opportunity for MKCVB and the tourism industry in Manhattan, in part, due to the outdoor oriented mindset and active participation numbers within Kansas, and the surrounding markets.

- Recreational and leisure sports activities, although not necessarily competitive in nature, drive travelers to visit new and unique destinations.

- Moreover, competitive athletes, “looking for something to do” during non-competition breaks will spend time and money engaging in other types of sports activities. For example, the majority (63%) of male softball players enjoy golf.

- Whether it’s improving the visitors’ “experience” in Manhattan, or getting them to spend more money while in the area, promoting recreational sporting activities is an opportunity for MKCVB.

**G. Non Sporting Events:** Special events, including mind sports and academic/scholastic competitions, including chess, cup stacking, debates, backgammon, darts, outdoor (hunting and fishing) shows, classic car and boat shows, sports memorabilia shows; they have very good participation numbers and are frequently just happy to have an organization like MKCVB take an interest in them.

**H. Growing the sports market in Manhattan** will most likely come by realistically identifying which sports segments create the best match for its infrastructure and then aggressively implementing relationships that bring these events to the area.

## 9.

**Bid Packets and Proposals:** Develop a MKCVB bid packet which can be customized to the wants and needs of individual sports and clients. MKCVB’s planning guide is quite good and Section G (1-17) has excellent photos and basic facility information. Unfortunately, the first question asked by most event rights holders is about the number of fields or playing surfaces, including their dimensions. Those facts should be included on any facility description overview/fact sheet.

The packet/proposal should include Manhattan’s unique competitive advantages and services. The packet should also include a visitor guide, a sport specific facilities fact sheet and their physical addresses, playing surfaces (quantity and dimensions), photos (action shots and facilities), and an area map. Much of the packet could be gleaned from the website.

**Simply listing facilities isn’t enough. Identify what the customer wants and needs, then customize the packet in such a way that demonstrates MKCVB’s unique qualifications and interest in them - their event, athletes, sponsors and spectators.**



**A.** Event organizers clearly understand a concentration of athletes living near a host destination (event) has the potential to develop into large and profitable event. The downside for DMO's, however, is if the concentration of athletes are too close to the destination, there is a higher probability the attendees will essentially "commute", and not spend the night.

**B.** MKCVB's recruiting efforts should focus heavily on state and regional competitions, which require lower bid fees and recruiting costs. The partnership agreement between Manhattan and any events rights holder, however, should ensure that any financial support is based upon attendees that actually spend the night, and definitely not on sheer numbers and/or the perceived prestige of the event.

**C.** Bid Fees are very common in the sports tourism industry, with 73% of destinations engaging in the practice. It's a cost of doing business in this market segment, but there are several alternative strategies, as recommended below.

-The term bid fees is a bit misleading and over used in the sports tourism industry. In fact, the term and blind acceptance of the practice has done more harm than good for destinations like Manhattan. Recruiting events is still about relationships, particularly at the local, state, and sometimes even the national level.

-Regardless of the industry, when an agreement is reached between two organizations, "consideration" is always exchanged. That consideration can come in the form of cash, but it's not always a bid fee, per se. More frequently, negotiations between a destination and an event owner involve either reducing costs or increasing revenue; it's still all about the bottom line for the rights holder.

-There are numerous ways to enhance the bottom line for the event owner, including agreeing to comp hotel rooms for staff or officials, waiving or reducing venue rental fees and promoting the event to drive attendance (which generates revenue). Regardless of the cost reduction or revenue generating tactic, destinations have a plethora of options to satisfy the customer's wants and needs. It just takes a little creativity and a willingness to build a win-win relationship.

-One among several alternatives for destinations, and a tactic VSM strongly recommends, is to negotiate a variable fee based on results. In other words, the agreement is based on the number of participants who spend the night. This approach creates an incentive for the rights holder to produce results for the destination. It also protects the destination from unscrupulous promoters, who on occasion have been known to inflate the size and value of their events.

-It's important to remember that all sports and/or events are not the same; each has a unique way of doing business. That's why sports tourism is an art and a science, so VSM recommends focusing on building win-win relationships for the long haul.

## 10.

**Sports Facility Guide:** If any consideration is being given to a printed sports and facilities guide, now or in the future, weigh the benefits and costs. Separate guides are expensive and rarely produce the returns needed to cover the investment. Utilize the targeted bid packets mentioned above; they're less costly and provide a more compelling and a targeted message to event rights holders.

## MKCVB Website (Sports):

After reviewing MKCVB's website, VSM is recommending a few changes. Websites can make a valuable statement about a sports tourism destination, but most importantly it serves as a recruiting and planning tool for rights holders, participants and spectators. In its current state, the sports section of the website is not comprehensive enough for rights holders, and simply needs an overhaul to make it more customer friendly. VSM recommends the following:

- Include a map with all major sports facilities, including physical addresses. Omit the facilities that are not used for competition events.
- Consider creating a separate Recreational Sports section that exclusively promotes leisure sports and venues.
- Establish credibility and promote past event successes on the site. Governing bodies want to know that a destination has experience hosting major events.
- List and categorize facilities by sports discipline and then identify the amenities.
- Photos must match the sports disciplines and facilities. Avoid using stock or generic photos.
- MKCVB's event calendar should list sports events for the entire year. Develop an easy to navigate events calendar (front end) and a recurring date feature (back end).
- Create and combine a News/Blog section for press releases; separating them is an unnecessary nuisance.
- Create a robust image gallery rather than allowing for multiple images on each facility page. Facility pages get cluttered quickly. Also, stick to landscape images only, for site continuity. This also allows MKCVB to refuse to upload an unattractive or inappropriate event poster.
- Each facility page needs a small section (blocked) for referencing area hotels and restaurants. 3-5 for each, no need for long descriptions, they just create page clutter; use jump links.
- Use a responsive design and keep the page count low. Keep basic event URLs that can be used year after year (do not use the year in the page title).
- Create a video gallery, if the city or county has a TV production department; imbed from YouTube.
- If the budget allows, develop a separate sports website. Please note that the primary objective is to make the sports website section customer friendly for rights holders, participants and spectators; it's a sales tool.

## Maximize Sport Travelers Expenditures:

Extending sporting event attendee's length of stay and total expenditures should be an important goal for MKCVB. It's critical that information about Manhattan actually gets into the hands of participants and spectators prior to their event. Event organizers should be encouraged to work in cooperation with, and on behalf of, MKCVB to provide the necessary information that will maximize spending opportunities and enhance their overall experience in Manhattan.

- Discuss with all event rights holders the importance of providing information to their participants, officials and spectators well in advance of the event about all that Manhattan has to offer.
- Focus on driving traffic to the MKCVB website.
- Insert MKCVB information packets in all pre-event mailings.
- Provide discount coupons from MKCVB tourism stakeholders and establishments.
- Create "bounce-back" incentives so event attendees have a reason to return to Manhattan.
- **Extend Their Stay:** VSM encourages the MKCVB to take advantage of a current trend among sports event attendees, who are turning their events into mini family vacations. **Sporting events are fundamentally the primary reason for visiting a destination.** MKCVB must capitalize on this opportunity and encourage its sports event attendees to extend their stay, either before or after the competition. There is definitely an opportunity for MKCVB to upgrade its pre-event marketing efforts, maximizing visitor spending in the area.

13.

### Wayfinding:

MKCVB must make it easier for event attendees to locate and find facilities. VSM's observations, while touring the area, indicate a definite need for wayfinding to competition sports facilities. This simply enhances the image of the community and improves the visitor's experience. suggests the following:



14.

### Manhattan Area Sports Council:

MKCVB has presently reached a point where additional human resources, marketing and operational support are needed to capitalize on event opportunities and grow the sports program.

**A.** VSM recommends that MKCVB expand the role of the Manhattan Area Sports Council in such a way that the Council serves as a greater source of expertise, guidance, sports industry contacts, gaining access to area facilities and operational support for the sports program. This will inevitably require identifying key sports experts, tourism stakeholders and local businesses that have an interest in growing Manhattan's sports program, but all clearly understand the mission of increasing overnight stays and sports visitor yield in Manhattan.

**B.** VSM also recommends that the MKCVB spearhead, and take complete ownership of this project from the start. It may be worth considering, and tactically important for MKCVB to make the Council an official sports sub-committee under the MKCVB Board that strictly focuses on recruiting and hosting sports and special events. All future development and operations of the committee should be aligned with MKCVB's Mission Statement and primary objectives. This will ensure that the group's primary purpose remains focused on recruiting and hosting sporting events that increase overnight stays and drive tourism traffic in Manhattan. The committee, depending on the personnel, should be able to provide assistance with politically charged issues, such as gaining better access to Manhattan's sports facilities.

**C.** Effective sports councils also frequently serve as fundraising mechanisms for "major" sporting events that require additional resources beyond what the MKCVB can provide. Quarterly luncheons, annual awards banquets, guest speakers can all provide resources, visibility and support for the sports program.

**D.** VSM does not recommend that MKCVB create or support a separate sports commission.

- Overnight stays and economic impact must be top priorities for MKCVB. More often than not, separate sports commissions lose focus of the true mission and purpose of the tourism initiative, and end up spending resources and time on local events that don't produce results for the tourism industry. Personal interests and pet projects divert the commission's primary mission of driving overnight stays and generating economic impact.

- When connected to CVBs, sports initiatives realize significant cost savings, synergies and economies of scale. The operational infrastructure and business operations of the CVB do not need to be duplicated; it's simply a waste of money and human resources.

- As stand-alone entities, sports commissions often dilute the core brand message of the CVB and the area.

- Having the sports commission as an initiative of MKCVB will enhance the commission's image. All governing bodies (rights holders) know that CVBs have additional resources (e.g. public relations, social media and marketing expertise) that most sports commissions don't have. Together they have the ability to more effectively serve the client's needs and produce tangible results for the destination.

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## SECTION #6: SUMMARY AND RECOMMENDATIONS

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Sports event traveler's (organizations, participants and spectators) weigh numerous factors when selecting a community, event and/or facility as their destination of choice. Primary decision makers (sports governing bodies and/or rights holders) are heavily influenced by their stakeholders, including athletes, officials and sponsors. ***Simply having the quality and quantity of sports facilities is not enough in today's highly competitive sports marketplace, but in Manhattan's case, this must be its top priority.*** VSM recommends that MKCVB address the following issues if it desires to grow the program into a successful player in the sports tourism industry.

**A. Manhattan must be able to provide the necessary sports facilities and related amenities, or sports event rights holders and thousands of participants simply won't come.** Manhattan must have sufficient quantity of venues to attract larger events, in addition to meeting the demand from local citizens and leagues; they go hand in hand. Manhattan simply has a facility deficit that must be remedied; the overall quantity and quality of infrastructure is marginal. **Although Manhattan has realized some good results, there are significant opportunities for growth and operational improvement on both the supply side (sports facilities) and demand side (marketing) of its operation. However, in order to grow the organization and maximize its return on investment, MKCVB must address the following:**

1. There is a desperate need for additional venues. However, of equal importance, there must be improvements made to several existing outdoor sports facilities at some point in the future. The cost for not investing in facilities will inevitably result in lower occupancy and the loss of millions of dollars in economic impact to Manhattan.
2. In light of current trends in sports events and local participation levels, Manhattan would realize the best return on its capital investments from improving its outdoor multi-purpose fields while simultaneously developing an indoor sports complex; this is another example of where the local participation rates and the sports event needs of Manhattan intersect.

**B.** The total quantity of facilities isn't enough, particularly when they're scattered throughout communities like Manhattan. In the highly competitive sports market, venue quality, and clusters of facilities are of equal and sometimes of greater importance.

1. Event rights holders have a plethora of destinations from which to choose. The quality of facilities is critical, and primarily the quality of playing surfaces. Manhattan needs a major upgrade to the quality of its existing facilities to be competitive.
2. Secondly, competition amenities (for both events and league play) like scoreboards, fencing, dugouts, spectator seating, lighting, practice/warm-up areas, restrooms, adequate parking and much more, will make the difference between securing events or losing them to a competing destination.
3. Focus on developing facility clusters for similar sports disciplines. An ample supply of competition venues is only part of a successful formula. A critical mass of competition playing surfaces at a single facility is very important to event rights holders and local leagues alike. Clusters of competition facilities more effectively and efficiently serve local demand, particularly for clubs and leagues. Frank Anneberg Park provides the empirical evidence of this fundamental fact.
4. A wide dispersion of venues can significantly impact profitability and operation logistics for event rights holders. It also stifles the growth and development of local clubs and leagues and requires a much greater amount of time and financial resources to maintain for the parks and recreation department(s).



# COMPETITIVE ANALYSIS

## C.

**All sports rights holders require sufficient ancillary infrastructure and amenities from their host community.** Examples include, but are not limited to accommodations, restaurants, attractions, meeting facilities and entertainment. These amenities create a better experience and improve yield (visitor spending) for Manhattan. These amenities are important issues for athletes, spectators and officials who are increasingly turning sporting events into family vacations. This has become a major trend in the sports/tourism industry, and a significant source of additional room nights and revenue for destinations like Manhattan.



## D.

**Many sports organizations and rights holders require strong local clubs or leagues.** Clubs and leagues serve as a source of volunteers, officials and event operational expertise. They also provide welcoming local environment and competitive advantage for hosting destinations. Their presence frequently serves as an important recruiting asset and deal closer.

**Hosting sporting events also benefits the community's clubs and leagues.** Events can provide a much needed revenue stream for clubs, which then augments their development programs and enhances opportunities for local youth. Events also allow local athletes and clubs the benefit of competing at home, thus reducing financial leakages outside of Manhattan. As it is now, many of Manhattan's sports teams must travel outside the area to compete, due to the lack of facilities in the area.

## E.

**MKCVB should continue its partnership approach with potential clients and local stakeholders.** When the sports program expands and grows to the next level, MKCVB will find it necessary to ramp up its event recruiting, operational assistance and performance analysis. It's an ongoing and dynamic process that requires time, relationship building and sufficient capital resources, all of which must be proactively planned and budgeted.

MKCVB should continue to provide client focused assistance, which includes securing facilities, assisting with accommodations, establishing room blocks and/or favorable rates, negotiating complimentary rooms for officials, providing pre and post event marketing assistance, media/public relations support, and assistance with event operations. Simply submitting bids and paying bid fees will not lead to a profitable and sustainable sports marketing operation. Fortunately, MKCVB has many of the core components in place, or has access to the resources needed to activate these elements.

## F.

**FVSM recommends that MKCVB's reorganize and develop a more active role for the Manhattan Area Sports Council.** This group can be an invaluable resource for MKCVB and a powerful recruiting tool for the sports operation. VSM does not recommend establishing a separate sports commission; this would be inefficient and a waste of valuable resources.

## G.

**Develop an Annual Sports Marketing Plan that aligns and supports MKCVB's mission, goals and objectives.** Diversify and expand the current portfolio of events and clients to reduce sector risk. Develop a balanced portfolio of events, both indoor and outdoor, relative to infrastructure and available resources. Establish benchmarks that include both short and long term goals.

**1. Event performance measurements and accountability must be a top priority for MKCVB!!! Research, measure and perform both pre and post event analysis on all current and potential (targeted) sporting events.** This analysis must include and incorporate specific performance measures and metrics. Strategic planning requires solid research. Establish a recruiting priorities checklist that is based, first and foremost, on return on investment (ROI). ROI is not always about money though. In fact, numerous factors must be considered, and ultimately play a role, when targeting specific sports disciplines and events.

**2. Produce an Annual Sports Marketing Report** that, among other things, includes actual performance vs. stated goals and objectives. The report should also demonstrate MKCVB's contribution to the tourism industry and its overall economic impact to the area. VSM recommends that this report be integrated into MKCVB's annual report, rather than a stand-alone piece.

## H.

**Serious consideration should be given to investing in a Sports Marketing Manager.**

## I. Capital Projects:

Manhattan's current facilities require improvements and in the case of indoor sports, the development of a tournament quality indoor sports complex; an investment in new facilities is long overdue. This deficit impacts both citizens and the tourism industry in Manhattan. However there is a complementary effect (benefits) to developing facilities that satisfy local demand and those of the sports tourism industry. VSM recommends that capital investments should be simultaneously made on upgrades to existing outdoor infrastructure and on the development of new facilities, particularly an indoor sports complex, which is the area's most glaring need. VSM also suggests seriously addressing MKCVB's access to Kansas State's world class venues and support infrastructure.

**MKCVB must also carefully consider the following:**

1. First, thoroughly analyze all infrastructure needs and opportunities based on potential long term trends, relationships with event rights holders, creating a balance between indoor and outdoor sports and most importantly tourism economic impact.

2. Second, prioritize capital investment opportunities based on "tourism industry" ROI, but also cognizant of the fact, tournament quality facilities better serve local citizens, clubs and leagues than a system that attempts to provide multiple neighborhood recreation centers. The strategy of multiple recreation centers has not worked for Manhattan in the past. Industry trends also suggest that this approach is not efficient or effective at meeting the needs of the local community. The strategy of developing multiple recreation centers is fundamentally flawed; it's fiscal drain and for the most part ineffective and inefficient at meeting local demand.

3. Third, cooperatively secure the backing of all tourism and sports stakeholders including (at minimum) the MKCVB staff and board, the Manhattan Area Sports Advisory Council, leagues, clubs, private sector facilities and sports related businesses, USD 383, City/County Parks and Recreation.

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**J.**

After careful analysis, VSM forecasts that MKCVBs increased investment (time and resources) in the sports tourism market segment will result in measurable and significant growth in tourism revenue for Manhattan. Growth would be accelerated dramatically by acquiring access to Kansas State's facilities, or with the development of new sports infrastructure. Either scenario will result in measurable benefits to Manhattan's citizens and the area's economic climate, including bed tax revenue, sales tax revenue, business development and growth, and jobs. The beauty of this strategy is that tourists, and the cash they bring to the area, would be paying for a higher quality of life and prosperity for Manhattan.

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Proactively managing the sports tourism initiative will ultimately create a powerful "reason" for traveling to Manhattan. The MKCVB's sports tourism program has tremendous potential. It will require tackling the area's facility deficit, thoughtful strategic planning, aggressive recruiting, managing the portfolio of events to ensure the highest ROI, restructuring staff responsibilities and forging collaborative relationships with sports tourism stakeholders.

**VISIBILITY SPORTS MARKETING  
WINTER HAVEN, FLORIDA.  
FEBRUARY 1, 2017**

