



DuPont Multi-Field Sports Complex Analysis

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SCI Alliance



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Key Questions

The Robert W. Droll Landscape Architect, PS team (RWD), including professionals from Hunden Strategic Partners and SCJ Alliance Team, was engaged by the City of DuPont to conduct a market, economic feasibility, site layout, and environmental review for a multi-field sports complex development on over 110 acres of federal property of Joint Base Lewis-McChord. The key questions the team was tasked to answer are:

- What is the market opportunity for a new outdoor sports complex development in DuPont?
- What is the existing statewide and greater regional supply of comprehensive outdoor sports complexes capable of hosting major tournaments and events? Is there a gap in quality supply that this facility could accommodate? How do national governing bodies and event organizers view the opportunity in DuPont?
- What are the environmental conditions that are impacting the site? How does this impact the market opportunity for the project?
- What are the findings and recommendations? What are the initial design concepts for the project?
- How is the recommended project expected to perform? What is the expected economic, fiscal, and employment impact of the project?

Headlines

- The development of a new outdoor multipurpose sports complex with a minimum of 20-regulation multipurpose fields (lighted - majority synthetic turf) would immediately establish DuPont itself as the premier destination in the state of Washington, and the greater region, for regional, and potentially national, soccer tournaments. Existing facilities in the region either lack the appropriate size (number of fields) or quality (amenities, lights, synthetic turf) to be considered attractive destinations for major events. Conversations with representatives from area clubs and USA/Washington Youth Soccer confirmed that the proposed/recommended facility in DuPont would have the ability to host both Regional Championships and State Cup events, in addition to other club and US-Soccer sanctioned tournaments.
- While there is significant opportunity for a new facility in DuPont to host impactful tournaments on the weekends and throughout the summer months, the lack of an obvious anchor tenant club to drive utilization during the week may present challenges. The existing premier clubs in the region either own their own facilities or are located too far from DuPont to utilize the complex for practices and training on a consistent basis. If a primary tenant is not created or identified, management of the facility may have to be creative and aggressive with midweek scheduling.
- While there are examples of similar facilities being privately developed throughout the country, the majority of these facilities are owned and developed by the public sector. Inducing a private development of this magnitude may present challenges.

Headlines

- Due to participation levels, lacrosse presents minimal opportunity at a new comprehensive outdoor multipurpose field complex compared to soccer. With that said, the area does host three to four major annual lacrosse events throughout the summer and fall seasons. With the development of a new complex, existing events that are limited by facility capacities would be able to expand, and there would be opportunity to create one or two regional events that would attract athletes from throughout the Pacific Northwest.
- With more than 3,100 hotel rooms located within ten miles of the proposed project site, the greater Tacoma and Olympia hotel markets should be able to accommodate the majority of the potential room-night demand driven by major regional events. However, with only four branded hotels located within five miles of the site, additional hotels in DuPont will likely be necessary moving forward.

Chapter 1

Project and Site Orientation

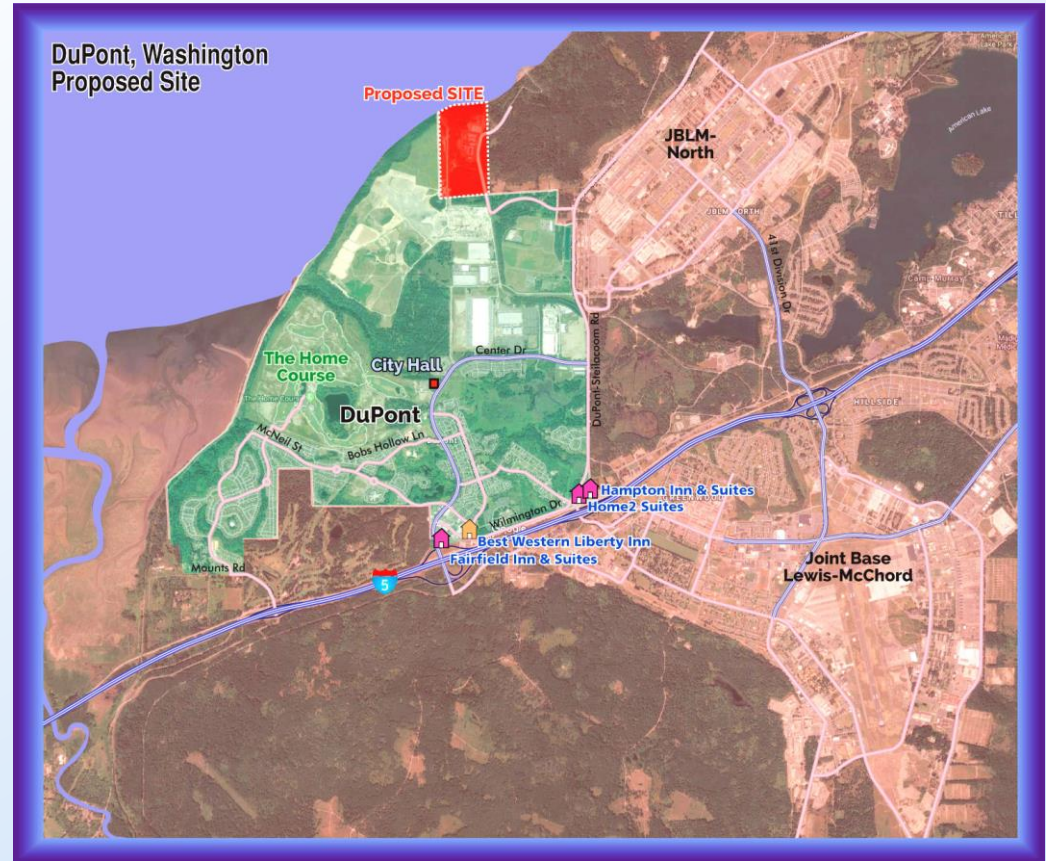
Project Orientation

- RW Droll Landscape Architects and Hunden Strategic Partners were engaged to investigate the feasibility of developing a multi-sports field complex (up to 30 fields) on federal property of Joint Base Lewis-McChord (JBLM).
- The team was asked to consider a combination of synthetic turf and grass fields, as well as a championship field (seating up to 4,000) and support amenities.
- The City of DuPont and JBLM aim to start a partnership with a private party that will build, operate, and maintain the complex.



Site Orientation

- 110 total acres of JBLM land – currently home to wastewater treatment plant
- Located northeast of the city limits, ten minutes from Interstate 5 and five minutes from Downtown DuPont
- Five hotels totaling 477 rooms located within 1.5 miles of the site:
 - Fairwood Inn and Suites
 - Hampton Inn and Suites
 - Home2 Suites
 - Best Western Liberty Inn
 - Fairfield Inn and Suites



Chapter 2

Economic, Demographic and Tourism Analysis

Overview

- Located 49 miles south of Seattle, 18 miles southwest of Tacoma, and 15 miles east of Olympia near Interstate 5, the region's dominant travel corridor
- Located 132 miles north of Portland
- Central location between Seattle and Portland could present significant tournament and event opportunities in the future



Population

	Population and Growth Rates				
	Population			2017 Estimate	Percent Change
	1990	2000	2010		2010 - 2017
United States	248,709,873	281,421,906	308,745,538	325,719,178	5.5%
State of Washington	4,866,692	5,894,121	6,724,540	7,405,743	10.1%
Pierce County	586,203	700,820	795,225	876,764	10.3%
City of DuPont	592	2,452	8,199	9,487	15.7%
City Pop. As % of County	0.1%	0.3%	1.0%	1.1%	—

Source: U.S. Census Bureau

- City of DuPont has experienced significant population growth over the last two decades - growth rate for DuPont surpasses Pierce County, the State of Washington and the United States.
- Population base not yet large enough to support local clubs that can drive utilization in new facility

Income, Spending & Other Demographic Data

- Extremely high income levels – necessary for certain youth sports participation
- Highly-educated local community – conversations with hoteliers warned of potential frustration from local citizens with increased traffic from new events and visitors

Income, Spending and Other Demographic Data

Category	United States	Washington	Pierce County	City of DuPont
Homeownership rate, 2012-2016	63.6%	62.4%	60.8%	50.2%
Median value of owner-occupied housing units, 2012-2016	\$184,700	\$269,300	\$239,400	\$310,600
Persons per household, 2012-2016	2.64	2.57	2.66	2.91
Median household income, 2012-2016	\$55,322	\$62,848	\$61,468	\$76,962
Persons below poverty level, percent	12.7%	11.3%	12.1%	7.0%
Total employment, 2016	126,752,238	2,685,355	251,689	—
Total employment, percent change, 2015-2016	2.1%	3.2%	2.8%	—
Retail sales per capita, 2012	\$13,443	\$17,243	\$12,461	—

Source: US Census Bureau

Educational Attainment - 2016

Population Age 25+	United States	Washington	Pierce County	City of DuPont
Did Not Complete High School	13.0%	9.4%	9.0%	1.8%
Completed High School	27.5%	22.9%	28.2%	11.1%
Some College	21.0%	24.3%	26.7%	22.6%
Completed Associate Degree	8.2%	9.8%	10.7%	13.8%
Completed Bachelor Degree	18.8%	21.3%	16.8%	30.3%
Completed Graduate Degree	11.5%	12.3%	8.6%	20.4%

Source: U.S. Census Bureau

Employment by Industry

- Fairly diverse employment base - a diversified economy helps protect a community from economic downturns

Pierce County Employment by Industry - 2016		
Description	Employees	Percentage of Total
Total employment	424,597	100%
By industry		
Farm employment	1,801	0.4%
Nonfarm employment	422,796	99.6%
Private nonfarm employment	332,703	78.4%
Health care and social assistance	53,372	12.6%
Retail trade	48,501	11.4%
Accommodation and food services	28,339	6.7%
Construction	27,362	6.4%
Other services (except government and government enterprises)	25,015	5.9%
Administrative and support and waste management and remediation services	23,602	5.6%
Manufacturing	18,925	4.5%
Real estate and rental and leasing	18,788	4.4%
Professional, scientific, and technical services	18,633	4.4%
Transportation and warehousing	17,062	4.0%
Finance and insurance	15,796	3.7%
Wholesale trade	14,763	3.5%
Arts, entertainment, and recreation	7,941	1.9%
Educational services	7,712	1.8%
Information	3,510	0.8%
Management of companies and enterprises	1,132	0.3%
Forestry, fishing, and related activities	906	0.2%
Mining, quarrying, and oil and gas extraction	672	0.2%
Utilities	672	0.2%
Government and government enterprises	90,093	21.2%
State and local	46,130	10.9%
Local government	34,799	8.2%
State government	11,331	2.7%
Military	31,844	7.5%
Federal, civilian	12,119	2.9%

(D) Not shown to avoid disclosure of confidential information, but the estimates for this item are included in the totals
Source: Bureau of Economic Analysis, Hunden Strategic Partners

Higher Education

- Adjacent table lists all colleges and universities within a 15-mile radius of DuPont
- Primarily small community colleges or private universities with enrollments under 5,000.
- Schools lacking available field space could potentially generate midweek use

DuPont Area Colleges & Universities				
Institution	Location	Distance from CH (miles)	Highest Degree Offered	Enrollment
Pierce College (Fort Steilacoom & Puyallup)*	Lakewood, Washington	6	Undergraduate	10,658
Clover Park Technical College	Lakewood, Washington	9	Undergraduate	3,978
Saint Martin's University	Lacey, Washington	9	Graduate	1,586
Pacific Lutheran University	Tacoma, Washington	10	Graduate	3,070
Tacoma Community College	Tacoma, Washington	11	Undergraduate	6,699
University of Puget Sound	Tacoma, Washington	13	Graduate	2,791
University of Washington Tacoma Campus	Tacoma, Washington	14	Graduate	4,987
Bates Technical College	Tacoma, Washington	14	Undergraduate	3,291
South Puget Sound Community College	Olympia, Washington	15	Undergraduate	4,861
Grand Total				41,921

*Distance shown to Fort Steilacoom. Enrollment shown for both campuses.
Source: National Center for Education Statistics

Attractions

- Local attractions can be a deciding factor for tournament organizers when comparing multiple destinations for an event

DuPont Area Attractions

Attraction	Location	Type
The Home Course	DuPont	Golf Course
Nisqually Methodist Mission Site	DuPont	Historic Site
Wilkes Observatory Site	DuPont	Historic Site
Lewis Army Museum	JBLM	Museum
Nisqually National Wildlife Refuge	Olympia	Nature
Nisqually Red Wind Casino	Olympia	Casino
Steilacoom Historical Museum	Steilacoom	Museum
Sunnyside Beach Park	Steilacoom	Beach
Eagles Pride Golf Course	Tacoma	Golf Course
Hudson's Bay Company Fort Nisqually	Tacoma	Historic Site

Source: Visit DuPont, TripAdvisor

Chapter 3

Local Sports Supply Analysis

Local Athletic Supply

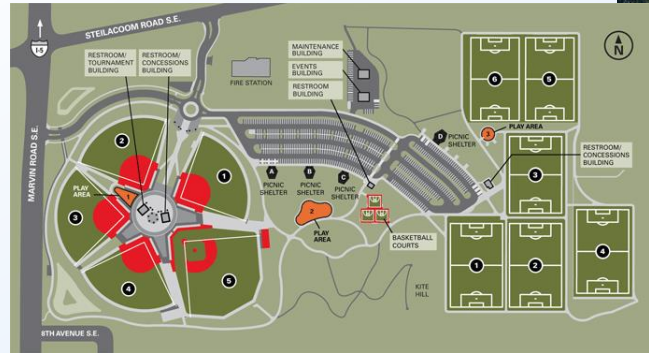
- Regional Athletic Complex in Lacey – primary existing outdoor venue in the local market
- Pacific Lutheran University – currently home to two statewide lacrosse events
- No existing local facilities with more than six multipurpose fields
- Puyallup currently developing three baseball fields with two soccer overlays – synthetic turf

Venue	Location	Distance from Site	Out dr M & T Turf	Out dr Synthetic Turf	Baseball Fields	Baseball Fields	Baseball Fields	Baseball Fields	Notes
Lewis North Athletic Complex	Lakewood	2.8	2	--	4	--	--	--	Minimal use outside the military base
Pioneer Middle School	DuPont	3.3	1	--	2	--	--	--	
DuPont PowderWorks Park	DuPont	3.4	1	--	1	1	--	--	
Beachwood Elementary School	Joint Base Lewis-McChord	3.5	1	--	1	--	--	--	
Chief Leschi Park	DuPont	5.0	1	--	--	--	--	--	large enough for youth soccer
Ft. Steilacoom Park	Lakewood	7.2	1	--	4	--	--	--	
Chambers Creek Soccer Field	Lakewood	7.4	2	--	--	--	--	--	
The Regional Athletic Complex	Lacey	10.4	6	--	5	1.5	--	--	
Sprinker Recreation Center	Tacoma	13.6	--	--	8	--	10	--	
Pacific Lutheran University	Tacoma	13.8	4	--	2	1	6	1	
Rainier Vista Community Park	Lacey	16.3	3	--	3	--	--	--	number of fields ranges by age group
LBA Park	Olympia	16.6	--	--	6	--	--	--	
Yauger Park	Olympia	20.2	--	--	4	--	--	--	skatepark
Puyallup Recreation Center	Puyallup	22.9	--	--	3	1	4	1	

Source: Various Facilities

Regional Athletic Complex Lacey, WA

- Constructed in 2004 - \$18.9 million
- Primarily PFD financing (\$12.3 million)
- 100-acre outdoor sports facility offers 5 softball/baseball fields and 6 regulation multipurpose fields
- Considered one of the premier baseball/softball complexes in the entire region



Regional Athletic Complex									
	2009	2010	2011	2012	2013	2014	2015	2016	2017
Number of Days Used - Grass Soccer	186	216	220	216	215	219	210	220	218
Number of Days Used - Synthetic Soccer	199	260	270	297	294	277	311	327	327
Number of Days Used - Baseball/Softball	144	277	322	326	315	336	336	338	339
Number of Participants - (Leagues & Tournaments)	0	42785	47685	50243	50315	74910	75150	76349	77119
Number of Reservations - Shelters	23	102	155	153	159	153	178	173	171
Concessions Lease Revenue	\$6,004	\$8,400	\$10,500	\$10,500	\$18,000	\$18,000	\$18,000	\$20,000	\$20,000
Concessions Commission Revenue	\$0	\$9,903	\$7,182	\$4,289	\$0	\$0	\$0	\$0	\$0
Rental Revenue (Shelters, Leagues & Fields)	\$166,623	\$299,266	\$378,688	\$386,089	\$409,371	\$415,805	\$448,134	\$448,570	\$463,360
Individual Bookings Softball Complex	429	877	928	1062	1183	1160	1297	1349	1367
Individual Bookings - Soccer Grass	575	639	701	734	689	721	776	715	765
Individual Bookings - Soccer Synthetic	231	356	326	398	375	400	423	484	443
Sponsor Banners Sold	0	13	21	28	37	37	37	39	53
Sponsor Banner Revenue	\$0	\$3,800	\$7,150	\$9,700	\$11,350	\$12,200	\$12,200	\$12,025	\$18,500

Source: City of Lacey

JBLM

- This is a public-private venture that will require approval at the highest levels – important that this is a partnership
- Co-use facility – will want to utilize the complex for physical training, practices, tournaments and other events – needs to be sustainable for the future and accessible without being a bother
- JBLM currently offers a \$14 million sports facility that includes diamonds and multipurpose fields – only accessible by JBLM
- JBLM would not pay to use the facility – their equity is the land
- JBLM would likely use facility in early morning hours – very little overlap with potential sports teams
- Lease would likely be 25 years with 25-year option

Local Stakeholder Feedback

- Existing sports demand in DuPont is driven by golf and compression from RAC in Lacey – also impacted by Tacoma Dome and Tacoma Convention Center
- US Youth Soccer Region 4 (West) – opportunity to host regional championships which attract 6,000 athletes and spectators over seven days
- This project will hopefully drive new hotel development in DuPont – the market likely does not have the appropriate infrastructure today
- The RAC is doing a tremendous job with baseball and softball events – this will likely be their focus if the facility expands – important that there is no duplication in development
- The project vision is to establish a world-class soccer facility at the level of Las Vegas, Hawaii, and San Diego – create a soccer destination in Pierce County along with Tacoma and Puyallup projects
- With 20 to 30 fields, a DuPont complex can attract regional and national tournaments with more than 400 teams
- The western portion of the United States is underserved for soccer
- Starfire Sports in Tukwila is the premier existing facility in the market, but isn't large enough to attract regional events

Local Stakeholder Feedback

- Oregon's facility supply is fractured – significant opportunity in DuPont for Denver-west events
- Location in the state is ideal – location between Seattle and Portland would be very attractive
- The Sounders have positively impacted the soccer market throughout greater Seattle – second highest merchandise sales behind Atlanta
- While synthetic turf is necessary, the facility should feature some grass fields
- No heat issues in the market – advantageous
- Lacrosse is still not strong in the South Sound market – likely minimal opportunity for significant utilization
- In addition to Starfire, the primary competitive complexes include 60 Acres and SOZO – these suffer from bad parking conditions, lack of lighting, poor bathroom complexes, and minimal amenities
- In addition to entering the rotation for Region 4 Championships, DuPont can become a hub for select-level tournaments

Tacoma Rainiers/S2

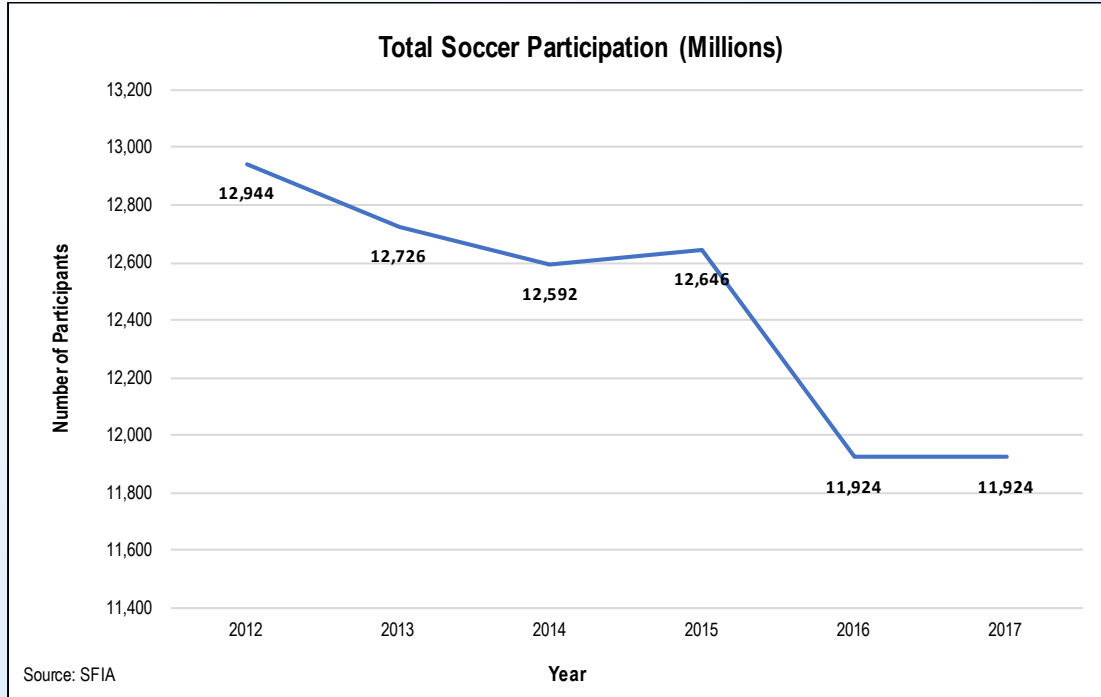
- Tacoma is currently in the midst of a 15-week study for a sports complex – partnership between Tacoma Rainiers and Seattle Sounders
- Rainiers – among the most successful AAA programs in the country – approached by Sounders with the purpose of finding synergy between two franchises
- Exclusive agreement to locate USL club Sounders S2 program into new 5,000-seat stadium located adjacent to Cheney Stadium in Tacoma (moving from Starfire) and changing name to Tacoma Defiance
- Seattle Reign FC women's soccer club to move to Cheney Stadium as well
- Three separate projects – driven by S2 stadium project
- Second project – multipurpose field complex located on landfill – anywhere from 4 to 12 fields, but likely closer to 4
- Third project – 20 acres of mixed-use development to act as filler between stadium and fields
- While the priority is the Sounders, the complex will be available for local use
- Ideally, Tacoma is home to premier stadium complex in the market (potential home for World Cup training) while DuPont is destination for major youth tournaments that require significant number of fields – two projects can complement each other

Chapter 4

Youth Soccer Trends; Market Overview

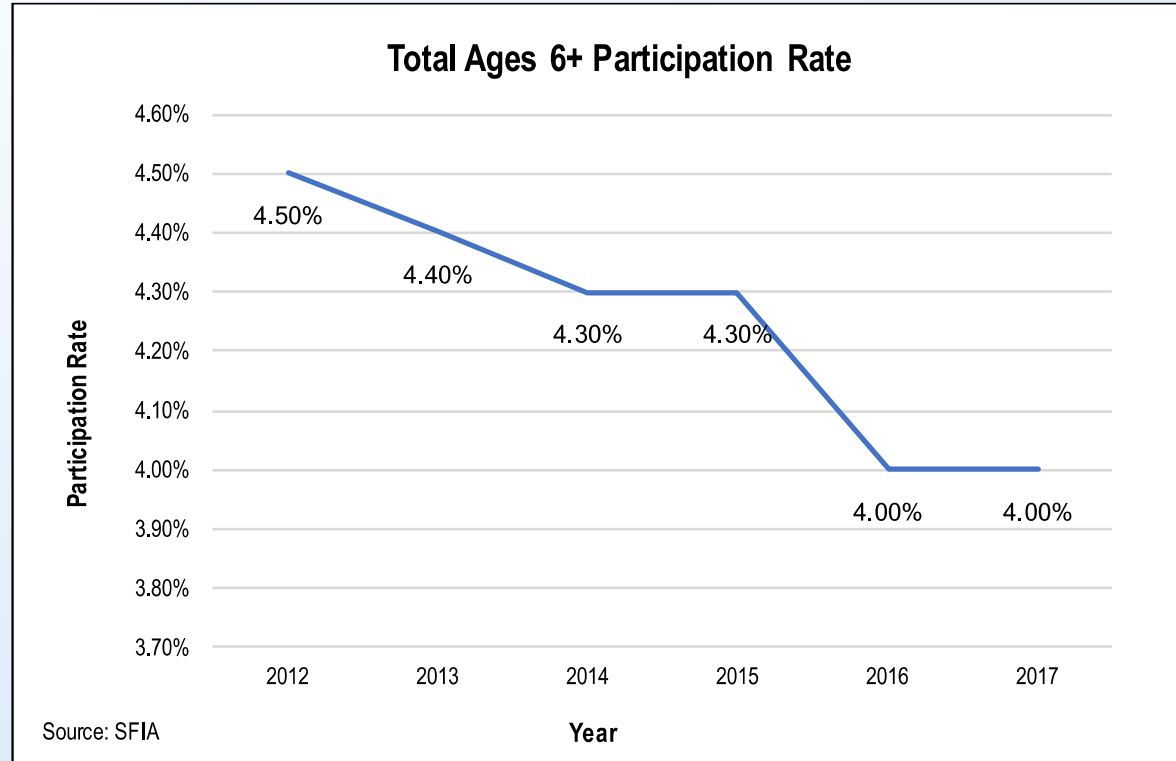
Soccer Participation

- 11.9 million soccer participants in the United States – decrease from 12.9 million in 2012
- Numbers do not include much of the lower-income Hispanic population that are a major piece of the national soccer landscape



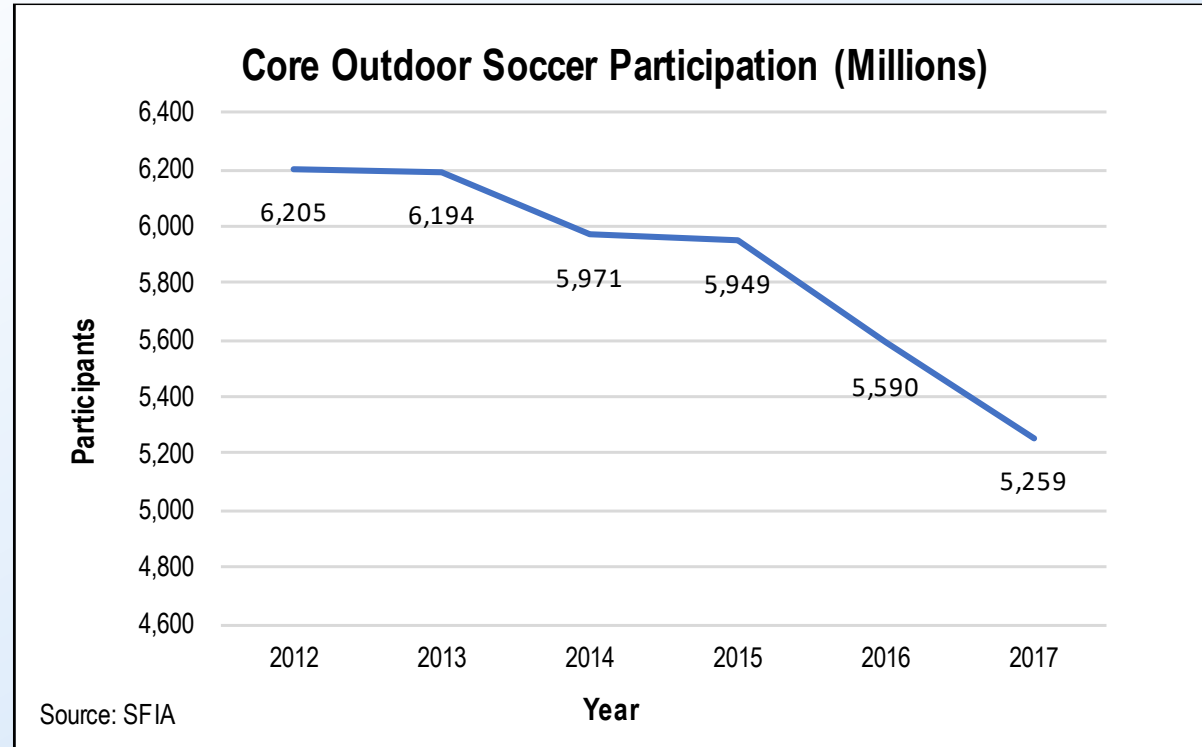
Soccer Participation

- Decreasing participation over the last five years for ages 6+



Soccer Participation

- 5.29 million core soccer participants in the United States



Soccer Participation

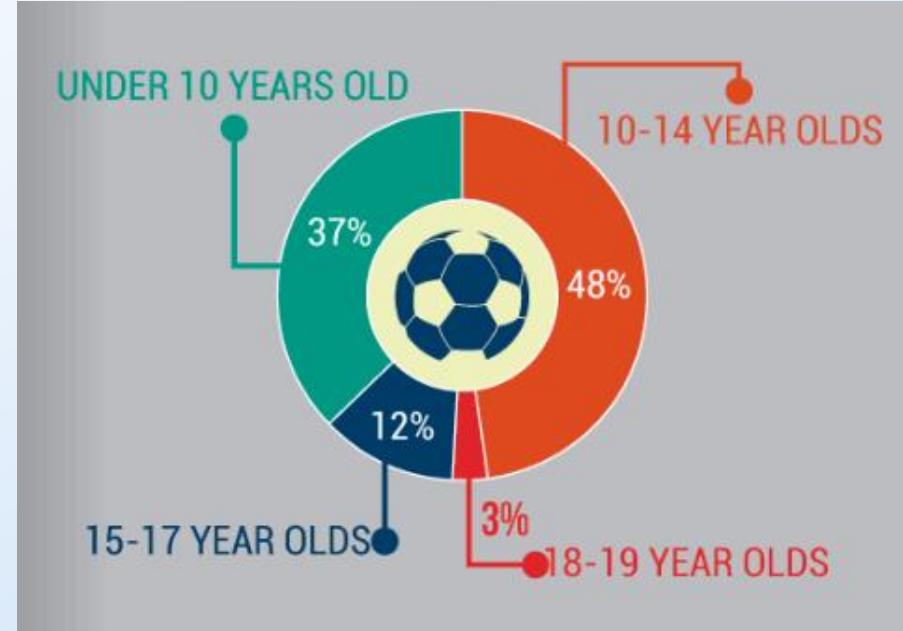
- Pacific region – second highest soccer participation in the United States
- While core participation is decreasing throughout the United States, participation in the Pacific region is very healthy compared to the rest of the country

Core Outdoor Soccer Participants				
	Total Number of Participants (000s)	Segment Percentage	Participation Rate	Index vs. Total Population
Male	3,025	57.5%	2.1%	118
Female	2,233	42.5%	1.5%	83
6 to 12	2,301	43.8%	7.7%	436
13 to 17	1,498	28.5%	6.9%	394
18 to 24	480	9.1%	1.6%	93
25 to 34	424	8.1%	1.0%	55
35 to 44	312	5.9%	0.7%	42
45 to 54	163	3.1%	0.4%	21
55 to 64	46	0.9%	0.1%	6
65+	34	0.7%	0.1%	4
New England	245	4.7%	1.8%	101
Middle Atlantic	707	13.4%	1.8%	103
East North Central	778	14.8%	1.8%	101
West North Central	292	5.6%	1.5%	85
South Atlantic	1,161	22.1%	2.0%	112
East South Central	210	4.0%	1.2%	68
West South Central	584	11.1%	1.6%	93
Mountain	377	7.2%	1.7%	99
Pacific	904	17.2%	1.9%	105
Total	5,259	--	--	--

Source: SFIA

US Youth Soccer

- Largest member of United States Soccer Federation – governing body for soccer in the United States
- More than 3 million athletes – average age of 11 years old
- 6,000 participating clubs
- 1,500 sanctioned tournaments per year
- 55 member state associations



National Championships

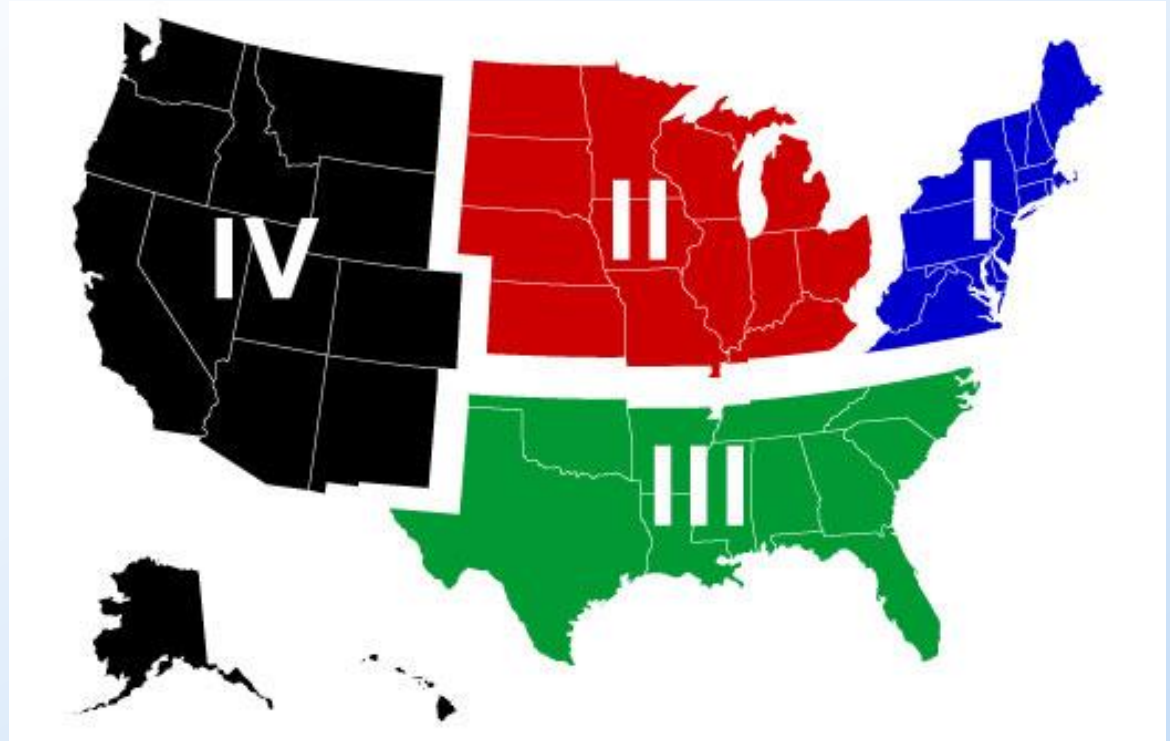
- The adjacent table lists the dates and location of the US Youth Soccer National Championships for the last eight years
- More than 15 fields typically required for a facility to be considered for national events

US Youth Soccer National Championships				
Year	Dates	Venue	Location	# of Fields
2018	July 24 - 29	Toyota Soccer Center	Frisco, TX	18
2017	July 25 - 30	Toyota Soccer Center	Frisco, TX	18
2016	July 26 - 31	Toyota Soccer Center	Frisco, TX	18
2015	July 21 - 26	Mohawk Soccer Complex	Tulsa, OK	17
2014	July 22 - 27	Maryland Soccerplex	Boyd's, MD	25
2013	July 23 - 28	Overland Park Soccer Complex	Overland Park, KS	12
2012	July 25 - 30	Manchester Meadows Park	Rock Hill, SC	8
2011	July 27 - August 1	Reach 11	Phoenix, AZ	18

Source: US Youth Soccer

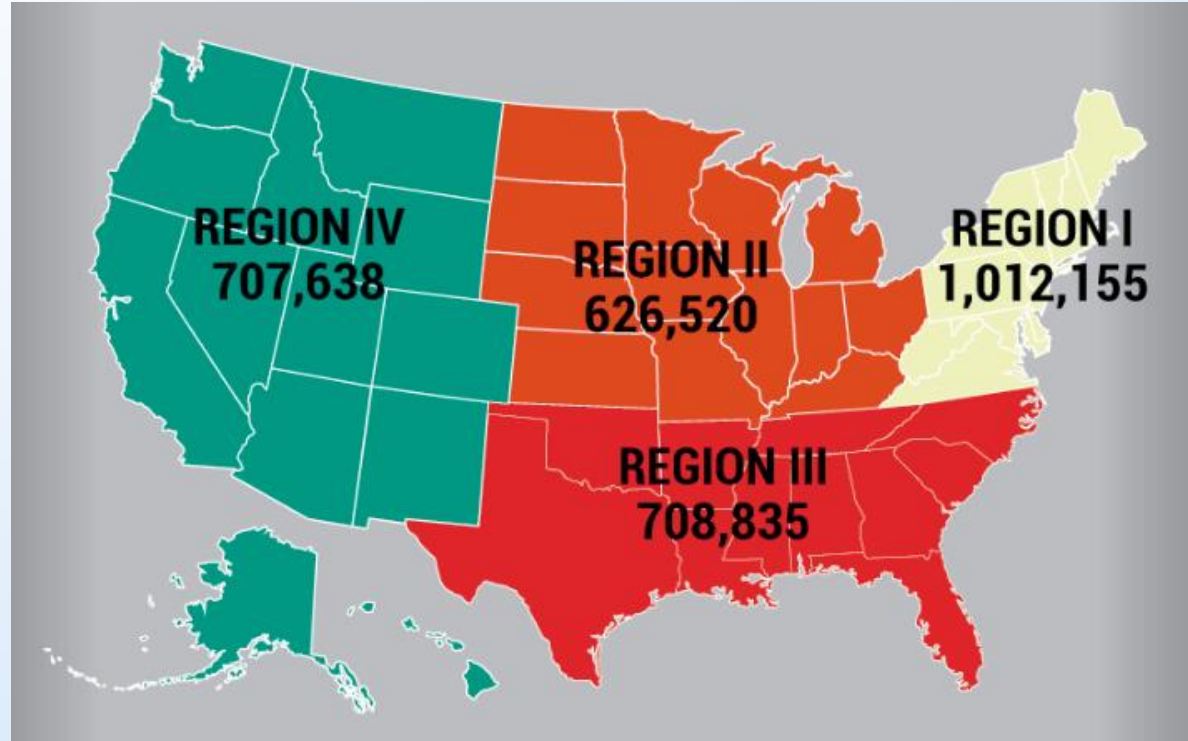
USA Soccer Regions

- US Youth Soccer is divided into four regions
- Washington is part of the West Region (Region IV). Other states include California, Oregon, Idaho, Montana, Nevada, Arizona, New Mexico, Wyoming, Utah, Colorado, Hawaii, and Alaska



USA Soccer Regions

- Region IV is home to more than 700,000 athletes



Far West Regional Championships

- The adjacent table details the dates and location of the Western Region IV Regional Championships for the last 8 years
- 20 regulation fields are generally required to be considered for a Regional Championship

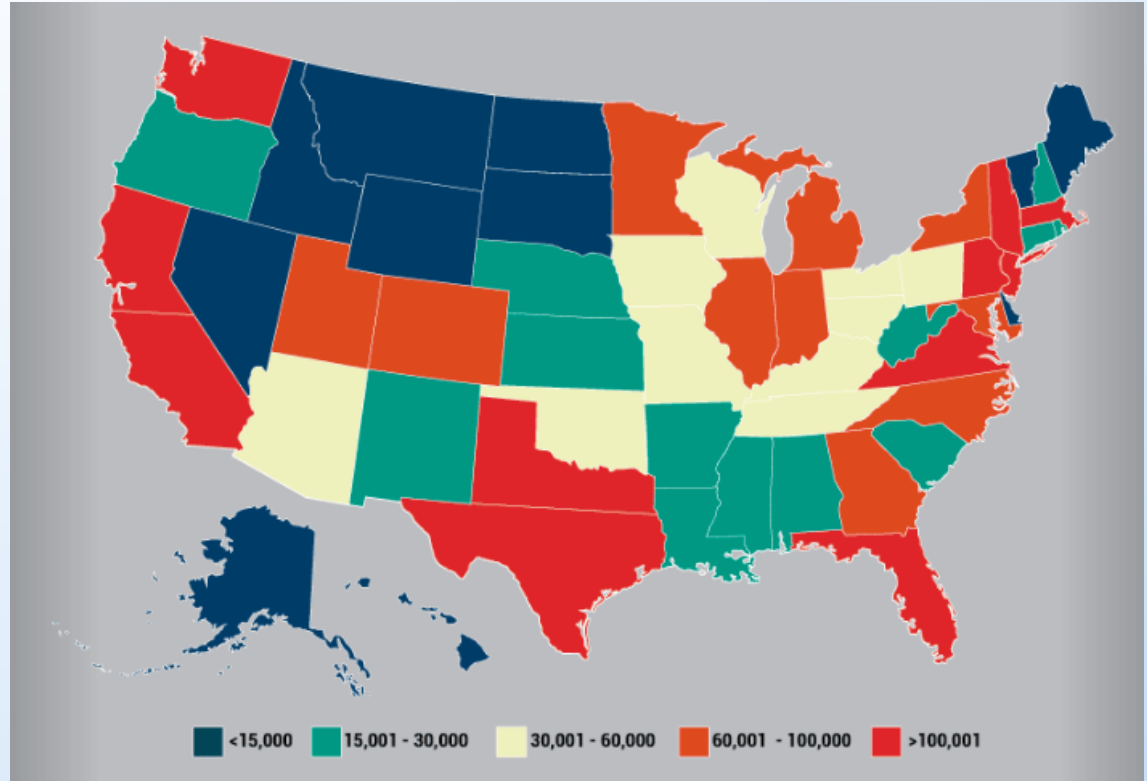
US Youth Soccer Far West Regional Championships

Year	Dates	Venue	Location	# of Fields
2018	June 18 - 24	Waipo Peninsula Soccer Complex	Waipahu, HI	23
2017	June 19 - 25	60 Acre Soccer Park	Redmond, WA	25
2016	June 20 - 26	Simplot Sports Complex	Boise, ID	20
2015	June 22 - 28	Simplot Sports Complex	Boise, ID	20
2014	June 16 - 22	New Mexico Tournament Soccer Complex	Bernalillo, NM	22
2013	June 17 - 23	Waipo Peninsula Soccer Complex	Waipahu, HI	23
2012	June 18 - 24	Reach 11	Phoenix, AZ	18
2011	June 20 - 26	Simplot Sports Complex	Boise, ID	20

Source: US Youth Soccer

State Participation – US Youth Soccer

- The adjacent figure shows participation levels the 55 member state associations in US Youth Soccer
- Washington is one of 12 state associations to be home to more than 100,000 athletes
- Washington – 11th largest US Youth Soccer state association in the country



Washington Youth Soccer

- Largest youth organization in the state
- 125,000 athletes and 29 youth soccer associations
- Consists of three leagues:
 - Regional Club League: Founded in 2010, comprised of top 18 clubs in the state (U10 to U19)
 - North Puget Sound League: Comprised of 22 youth soccer associations and more than 57,000 athletes (385 teams)
 - South Sound United League: comprised of seven youth soccer associations in South King and Pierce Counties
- Leagues offer a 12-match fall season (Labor Day through November) and 8-match spring season (late March through early June)
- Two or three divisions per age/gender to optimize comparable competition (promotion and relegation)
- Washington Youth Soccer administers four State Tournaments each year:
 - Washington Youth Soccer Recreational Cup (recreational)
 - Washington Youth Soccer Founders Cup (developmental)
 - Washington Youth Soccer Presidents Cup (competitive)
 - US Youth Soccer Washington State Championships (highly competitive)
- Utilizing Starfire as the site for state events

Chapter 5

Regional Facility Analysis; Sports Tournament Opportunity Analysis

Competitive Regional Supply – Within 100 Miles

- Starfire Sports complex – highest quality soccer venue in the state, but lacks the parking space and appropriate number of fields (currently offers 12 total outdoor fields, including seven multipurpose) to be viewed as a destination for regional and national events
- 60 Acres – offers 25 fields but lacks the quality, destination appeal, and appropriate amenities to host many major events

Relevant Outdoor Regional Athletic Supply									
Venue	Distance from DuPont (mi)	Location	Tr. all M. & Jr. pos. e	Indor	M. & Jr. pos. e	Baseball 15' of field	Baseball 1	Tennis	Volleyball
Heritage Recreation Center	21	Puyallup, WA	6	--	5	--	--	--	--
Washington Premier Football Club	22	Puyallup, WA	11	--	--	--	--	--	--
Celebration Park	27	Federal Way, WA	4	--	4	--	--	--	--
Starfire Sports	40	Seattle, WA	14	2	--	--	--	--	--
NW Sports Hub	40	Centralia, WA	5	2	9	4	--	5	--
Mason County Recreational Area	42	Shelton, WA	8	--	7	--	--	--	--
60 Acres North Field	62	Redmond, WA	25	--	--	--	--	--	--
Northcreek Soccer Complex	64	Bothell, WA	7	--	4	--	--	--	--
Fairfield Park	75	Monroe, WA	8	--	--	--	--	--	--
Stocker Fields Soccer Complex	76	Snohomish, WA	17	--	--	--	--	--	--
152nd Street Soccer Complex	90	Marysville, WA	6	--	--	--	--	--	--
Lochsloy Fields	90	Lake Stevens, WA	6	--	--	--	--	--	--

Source: Various Facilities

Competitive Regional Supply – Greater than 100 Miles

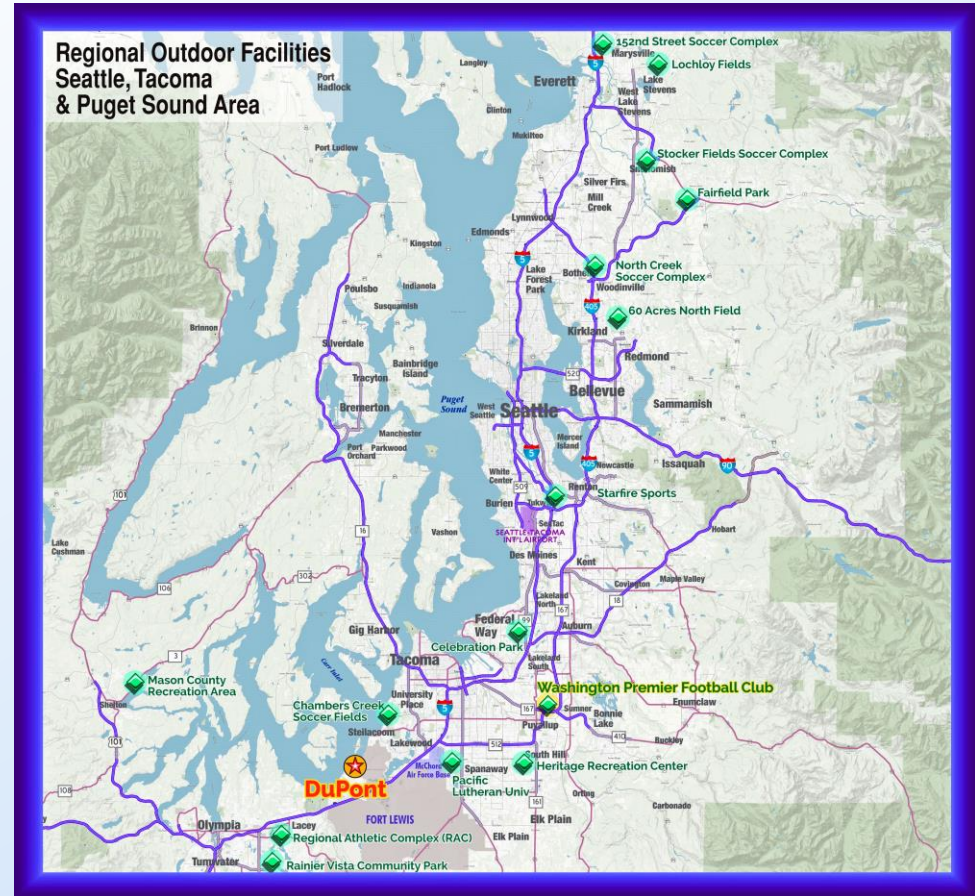
- SOZO Sports Complex – suffers from accessibility issues
- Simplot Sports Complex in Boise. Idaho – home to Far West Regional Championships three of the last eight years – 20 regulation grass fields

Venue	Distance from DuPont (mi)	Location	Triathlon	Indoor	Baseball	Basketball	Tennis	Volleyball	Other
Skagit River Park Playfields	114	Burlington, WA	22	--	8	--	--	--	
Delta Park (Owens Sports Complex)	124	Portland, OR	9	--	6	--	--	--	
Harmony Sports Complex	127	Vancouver, WA	9	--	7	--	--	--	
Phillips 66 Soccer Park	146	Bellingham, WA	11	--	--	--	--	--	
Perry Soccer Complex	150	Yakima, WA	6	--	--	--	--	--	
SOZO Sports Complex	150	Yakima, WA	13	--	--	--	--	--	
Tri Cities Youth Soccer	230	Pasco, WA	11	--	--	--	--	--	
Dwight Merkel Sports Complex	316	Spokane, WA	8	--	6	--	--	--	skate park and BMX track
Simplot Sports Complex	516	Boise, ID	20	--	8	--	--	--	
SLC RAC	866	Salt Lake City, UT	16	--	--	--	--	--	
Lakeside Soccer Complex	906	Orem, UT	8	--	5	--	--	--	
Silverlakes Sports Complex	1211	Silverlakes, CA	24	--	--	--	--	--	

Source: Various Facilities

Competitive Regional Supply

- Located 22 miles northeast of DuPont, Washington Premier Football club is the closest quality facility to the DuPont site – the privately owned 11-field complex is extremely limited in its number of synthetic turf fields (3)



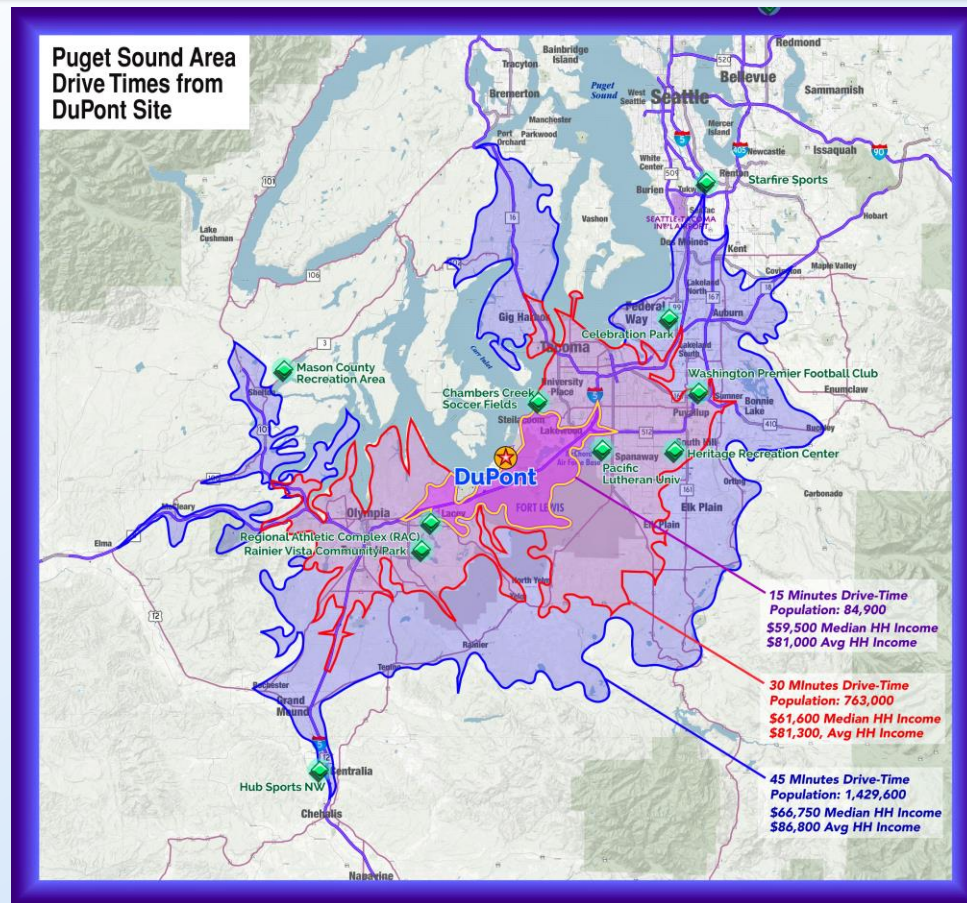
Competitive Regional Supply

- Currently no quality facilities in Oregon with 10 multipurpose fields in one location



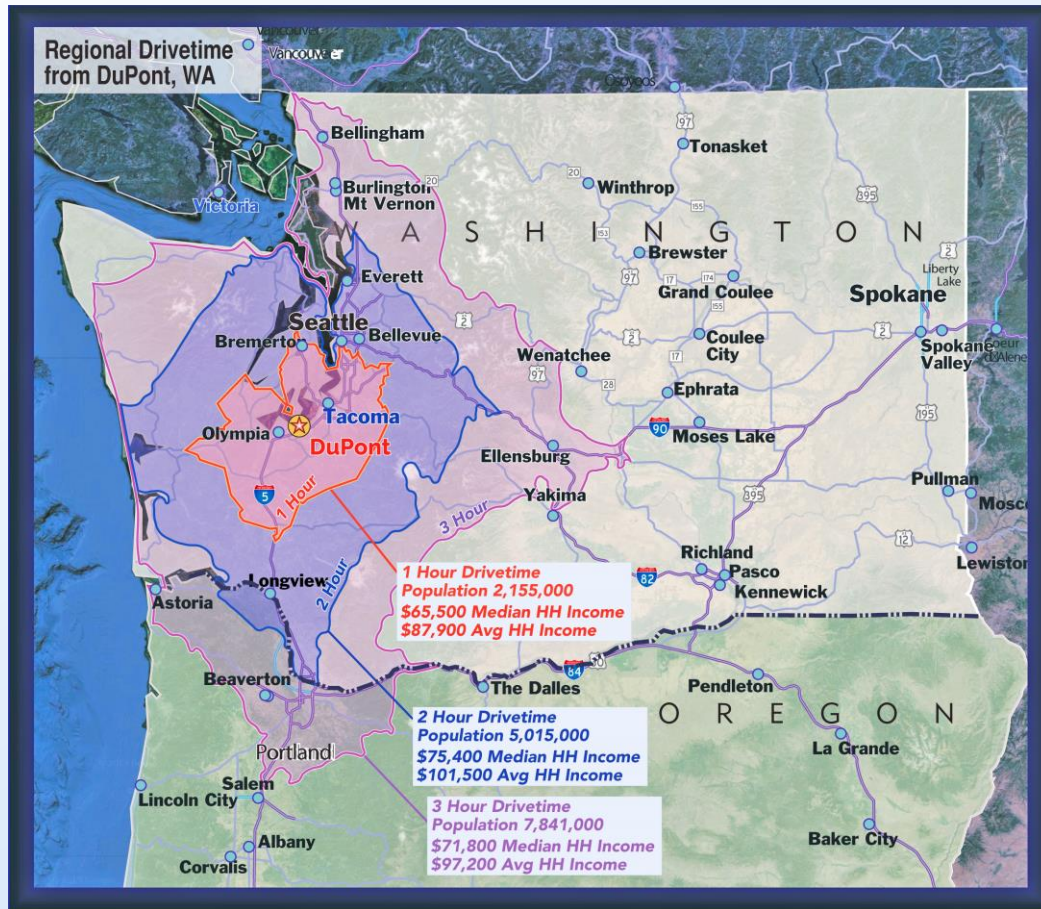
Drive Time Population

- 84,900 residents within a 15-minute drive – primary draw area for midweek practices and training



Competitive Regional Supply

- Seattle and Tacoma residents likely will not drive more than 20 to 30 minutes for weekday training, but there is a significant market in the greater Seattle region for a new facility in DuPont to generate impactful weekend soccer tournaments for clubs of all levels throughout the state



Washington Youth Soccer

- 250 sanctioned events per year throughout the state – many held in local communities by area clubs – schools and parks and recreation complexes
- Washington Youth Soccer is hosting four state events at Starfire – facility's third largest user behind Seattle Sounders and Pac NW
- Major tournaments occur on Halloween, Thanksgiving, Easter, and then from June through August – three day events occurring every weekend – occurring at Starfire, 60 Acres, and SOZO
- Currently in a three-year bid cycle to determine location for Regionals and Presidents Cup
- Fall and spring leagues – August through Christmas and February through May
- Access is critical – Starfire is extremely attractive due to its location and proximity to interstate highways
- Overall, there is a major lack of facilities in state and the greater region – clubs are having to develop their own complexes and are turning down registrations due to lack of space which is hindering growth
- If this facility were built and featured the appropriate amenities, Washington Youth Soccer would likely relocate their event to DuPont – good location, synthetic turf, lights, and larger than Starfire

Washington Youth Soccer

- Extremely limited by the number of fields at Starfire – quality venue but the facility does not offer close to as many fields as are needed – also hindered by parking and cost
- 60 Acres complex does not feature lights or other support amenities to attract regional and national events
- SOZO Sports Complex in Yakima – facility is not easily accessible for major events (air access)
- A new facility in DuPont would immediately become the number one destination in the state - would allow the market to attract national events
- 20 regulation fields (including championship field) would likely be necessary to attract regional and national events
- Additional amenities that would enhance the attractiveness of the venue: offices, club meeting rooms, referee rooms, additional meeting rooms
- Include as few grass fields as possible – can only be utilized three months of the year
- Opportunity to host events up to 30 weekends per year

Regional Soccer Stakeholders

- Washington Premier – along with Crossfire, the top two clubs in the state. Washington Premier likely would not train in the proposed DuPont facility because it's too far away – happy with existing facility
- The location of DuPont is a challenge midweek – clubs will not drive more than 30 minutes to DuPont for practice
- No obvious major clubs in area to drive weekday use – potentially a few teams in Olympia would travel to DuPont
- Any new complex should features some grass fields – purists still enjoy playing on grass
- Definite opportunity for major regional weekend events, but will likely have to create some tournaments at new complex
- Opportunity to bring multiple area clubs together to create new event that currently cannot be accommodated
- There could potentially be an opportunity to create a new club, but the surrounding demographics are difficult
- If a new club is established, there may be opportunity to attract athletes from within a one hour drive time to new facility
- This complex can certainly become the destination within the state, but air access may present challenges

Youth Soccer

- Adjacent table summarizes a portion of sanctioned Washington youth soccer tournaments in 2018 (only includes events with a listed facility)
- Major events occurring in peak summer months – 60 Acres, Sozo, Starfire, and Skagit River (all have more than 14 fields)

Washington State Youth Soccer Tournaments (2017)

Date	Name	Facility	Location	Age	Cost
5/19-5/20	Yak Attack 5v5	Ahtanum Youth Park	Union Gap	U9-U14	\$200-\$275
5/26-5/28	Hispanic Youth Championship	Sozo Sports	Yakima	U10-U19	N/A
6/15-6/17	Skagit Firecracker	Skagit River Park	Burlington	U9-U19	\$425-\$675
6/15-6/17	Starfire Spring Classic	Starfire Sports	Seattle	U10-U19	\$465-\$575
6/21-6/24	Rainier Challenge	WPFC Complex	Puyallup	U9-U19	\$600-\$800
6/22-6/24	Rainier Valley Classic	Starfire Sports	Seattle	N/A	N/A
6/28-7/1	Cascade FC Cup	Jeanne Hansen Park	Snoqualmie	U9-U10	\$400
6/30-7/1	Club Premier Invitational II	Sozo Sports	Yakima	U10-U19	N/A
7/6-7/8	Copa Yakima	Sozo Sports	Yakima	U12-U17	\$575
7/6-7/8	Seattle Cup	Starfire Sports	Seattle	U10-U19	\$550
7/6-7/8	Snohomish United Invitational	Stocker Fields	Snohomish	U10-U19	\$550-\$750
7/20-7/22	Starfire Sounders FC Cup	Starfire Sports	Seattle	U10-U19	\$520-\$630
7/27-7/29	MVP Outreach Physical Therapy Summer Challenge	Ravensdale Park	Ravensdale	U9-U12	\$475-\$550
8/3-8/5	Cowlitz Kickoff Classic	7th Avenue Park	Longview	U10-U19	\$250-\$400
8/10-8/12	Redapt Cup	60 Acres	Redmond	U9-U19	N/A
8/16-8/20	Snohomish United Bigfoot	Stocker Fields	Snohomish	U9-U19	\$475-\$695
8/17-8/19	Starfire Xtreme Cup	Starfire Sports	Seattle	U10-U19	\$410
8/18-8/19	Dave Painton Cup 5v5	Fort Steilacoom Park	Lakewood	U10-U19	\$150-\$175
8/24-8/26	River Jam Challenge	WPFC Complex	Puyallup	U9-U19	\$450-\$550
8/25-8/26	NYSA Jamboree	60 Acres	Redmond	U7-U19	\$75-\$90
8/24-8/26	Sky River Soccer Tournament	Fairfield Park	Monroe	U10-U19	\$375-\$475
8/31-9/3	Starfire Labor Day Cup	Starfire Sports	Seattle	U9-U19	\$495-\$595
9/1-9/2	Valley Rally	Sozo Sports	Yakima	U8-U19	\$195-\$295
9/1-9/4	Labor Day Cup	Starfire Sports	Seattle	U9-U19	\$485-\$585
11/10-11/12	Eastern Washington Cup	Sozo Sports	Yakima	U10-U19	N/A
11/18-11/19	FMEJSC Turkey Jamboree	Dacca Park, CJH, FHS	Fife	U7-U12	\$150-\$250
11/23-11/25	Cranberry Cup	Bothell & Woodinville Fields	Bothell	U9-U19	\$400-\$500
11/24-11/26	Starfire AstroTurf Cup Collegiate Showcase	Starfire Sports	Seattle	U15-U19	\$675-\$875
11/24-11/26	NYSA Cranberry Cup	Bothell & Woodinville Fields	Bothell	U10-U19	\$400-\$450

Source: Washington Youth Soccer

South Sound Lacrosse Club

- Lacrosse season runs spring through fall – school season occurs in spring months and major tournaments are hosted in summer and fall
- Major summer event at Pacific Lutheran University over three days on five fields – capped at 64 teams due to lack of fields - opportunity to grow
- No need for lights during summer months – unable to host events in fall because no quality facilities with lights exist in South Sound
- Starfire – own the lacrosse landscape in the fall – two major three day event utilizing seven fields
- Planning to add new summer tournament next year – ideally 36 teams
- Opportunity exists at the collegiate club level, PCWA and MCLA are looking for regional event destinations – have not pulled trigger on Starfire – ideal facility would offer 8 fields
- South Sound Lacrosse League (includes teams south to Olympia) host an annual three-day event in Puyallup – practicing at schools and public parks
- South Sound Lacrosse Club is traveling to regional tournaments in Portland, Yakima, Las Vegas, and San Francisco

South Sound Lacrosse Club

- There is a movement for teams to travel less – a lot of interest in adding local events to the calendar
- There are more barriers to hosting events in the summer and fall for club teams – not as easy to access school complexes and facilities need synthetic turf (can play on grass in summer) and lights – lacking in market
- Washington Premier does not offer enough synthetic turf fields to be a tournament destination
- Ideal facility would have different line colors for soccer and lacrosse, but not necessary
- Largest existing regional events require 10 regulation multipurpose fields
- With 20 or more fields, national event promoters would likely be very interested in hosting major events with up to 150 teams – has not gotten traction yet in Washington (would likely need to be in summer months because DuPont would be competing with facilities in Southern California)
- Would prefer that majority of fields are synthetic and lighted, but not required for all fields
- Possibility for two indoor soccer fields? Would get utilized
- Additional preferred amenities – coffee shop restaurant, sports bar, multiple viewing areas

South Sound Lacrosse Club

- DuPont is likely close enough to major hotel nodes in Tacoma and Olympia that it would be seriously considered for national bids
- A new facility would be very attractive for teams from Oregon – perfectly situated between Seattle and Portland
- Primary challenge will be midweek – families will not want to drive 20 miles to practice
- Seattle clubs will not travel to Starfire due to traffic
- No obvious users in Olympia area – growing, but most of lacrosse market is north of DuPont
- Starfire – very expensive – barrier for some groups
- Need more clubs to develop in the area to drive midweek use – likely five years away
- Definitely a field drought in the region

US Lacrosse – Pacific Northwest

- The Pacific Northwest chapter of US Lacrosse serves WA, OR, Northern CA, ID, MT and WY
- DuPont area has yet to develop into a hotbed for lacrosse, but there is major lacrosse activity near Seattle and Portland
- Starfire has been the go-to facility along the I-5 corridor for multi-field lacrosse events
- Rates vary greatly depending on venue, but Starfire is a good baseline for pricing
- In addition to the spring season, opportunity exists for:
 - Fall and winter tournaments
 - Summer camps and clinics
- An ideal facility would include:
 - 10 – 15 fields
 - Plenty of parking (has been an issue)
 - Medical training room
 - Turf fields (lined for boys and girls)
 - Classroom(s) with A/V capabilities
 - Restroom facilities
 - Concessions
 - Locker rooms are not that important

US Lacrosse – Pacific Northwest

- 11 fields typically required to be considered for US Youth Lacrosse National Championships

US Youth Lacrosse National Championships				
Year	Dates	Venue	Location	# of Fields
2018	August 3 - 5	DE Turf Sports Complex	Fredirica, DE	13
2017	July 28 - 30	River City Sportsplex	Richmond, VA	12
2016	July 19 - 24	Grand Park	Hamilton County, IN	31
2015	July 24 - 26	River City Sportsplex	Richmond, VA	12
2014	July 21 - 23	Aurora Sports Park	Aurora, CO	27
2013	July 28 - 30	Morgan Hill Outdoor Sports Center	Morgan Hill, CA	11
Source: US Youth Soccer				

Rugby – Rugby Festival Events

- Based in Seattle - working to promote rugby events throughout the region
- Ideal complex features two to four pitches in one location – difficult in United States – typically using soccer pitch
- New professional team in Seattle has sparked interest – 15-club rugby league in Pacific Northwest
- Most clubs feature two adult teams and multiple Junior teams – Portland through Washington
- In addition to league, 7-on-7 has become prominent in college and high school age groups
- Regulation field can accommodate two simultaneous 7-on-7 games
- Majority of events are combination of rugby clubs and local participants – supported by city councils due to active engagement
- With regulation indoor synthetic turf field there is possibility for a couple of 12 and 16-team events – 200 athletes
- Would be willing to pay up to \$100 per hour for field – primarily local participants

Chapter 6

Case Studies

Grand Park

Location: Westfield, IN

Owner / Operator: City of Westfield / Various Organizations

Notable users: Indiana Soccer Association, Indianapolis Colts, Indiana Fire Juniors, Indiana Bulls, Indy Eleven

Pros: Tournament-quality facilities, large local programs operate facilities, mix of turf and grass fields, well-maintained

Cons: Amenities proximity to fields, limited shaded areas, multiple events happen each weekend

Additional Info:

- 400 acres
- Opened in 2011
- Includes: 31 multipurpose fields, 26 baseball diamonds, 8 basketball courts or 16 volleyball courts, 3 indoor multipurpose fields



Grand Park

- Grand Park is 100% owned by the city of Westfield
 - Different structures are in place for the operations of baseball, soccer, basketball, etc.
 - Would advise against splitting responsibilities among parties for maintenance (irrigation, upkeep, etc.)
- There was a private developer involved during the design phase
- A championship field is a luxury item
 - Use it roughly 10 times per year
 - Need to look for title sponsor for the first five years
- Locker rooms are used sporadically – if you have them people will use them, but they can find another way
- Fields are the biggest revenue producers, partially because of the condition in which they are kept
- There are currently no plans to add any amenities – however, they have thought about play structures or shade structures
- Do not count hours, but they will allow 7 – 10 unused days on grass fields before major events
- Dynamic pricing model, discounted rates for tenants
- There are about 4,000 paved parking spots – works year round with the exception of a couple big weekends – too many entry points makes it difficult for gated events
- Currently own two events, growing to six – would encourage event ownership

ESPN Wide World of Sports

Location: Orlando, FL

Owner / Operator: Walt Disney Parks & Resorts / Disney Sports Enterprises

Notable Users: Disney Girls & Boys Soccer Showcase presented by AS Roma, Pop Warner Super Bowl, Disney Field Hockey Showcase, A USA Field Hockey sanctioned event, Challenge 3v3 National Championship

Pros: Tournament-quality complex, high reputation for tournament use, strong relationships with national organizations

Cons: Primarily focused on tournaments, multiple events each weekend, parking proximity issues, high entry-fee prices

Additional Info:

- Opened in 1997
- 220 Acres



- 9,500-seat baseball stadium
- 5,000-seat multipurpose arena,
- 70,000-square foot HP Field House,
- 44,800-square foot J Center,
- Marathon Sports Fields (17 multipurpose fields, includes 1 stadium field)
- Baseball quadruplex (4 professional baseball diamonds)
- Softball Diamond (6 softball/youth baseball diamonds)
- Centre Court Stadium (Ten-Court Tennis Complex)
- Track and Field complex
- Cross-country course

ESPN Wide World of Sports

- Owned by a public corporation (Disney)
- If they could redesign the facility – may not have included tennis courts or a track
- No initial master plan with phased developments
 - There have been building phases
 - Growth has happened organically as a result of demand
- Disney used only their own resources entirely, with the exception of the original master architect and HVS
- Facilities and grounds are operated in-house
- Amenities were chosen through external market research and trends, in addition to leadership experience within the industry
- Gate ticketing, team registration and naming rights are the biggest revenue producers
- Always looking for new amenities to add. Must have capital expenditures that have a strong ROI
- There are no specific field usage limits – wear and tear is the biggest reoccurring capital outlay
- Fields are not rented out – the business model involves a broader financial package including theme park ticket sales and hotel room revenue
- There are several thousand parking spots – all driven by building permit codes tied to occupancy projections
- Own over 60 events – these are the most profitable

Maryland Soccerplex & Discovery Sports Center

Location: Boyds, MD

Owner / Operator: Maryland Soccer Foundation, Inc.

Notable users: Washington Spirit, SAM Soccer, AAU, DC Flames, DC Metro, US Olympic Qualifier match, MLS matches, ACC men's soccer championship

Pros: Tournament-quality indoor and outdoor complex, includes a championship field, programming includes youth to professional

Cons: Limited parking, lack of updated amenities throughout the complex, high-traffic during large tournaments

Additional Info:

- Opened in 2000 - 162 acres
- Includes: 24 multipurpose fields, 1 championship multipurpose field, 5 baseball diamonds, 8 basketball/volleyball courts, 2 indoor multipurpose turf fields



Maryland Soccerplex & Discovery Sports Center

- Public private partnership – land was provided by the local parks department (county and state also funded \$8 million in infrastructure), Maryland Soccer Foundation financed the development of the fields and indoor facility
- Would change parking, restrooms and lighted field count if they could
 - 75 parking spots per field, but they could use 90
 - Visitors enjoy having permanent restrooms, but they are a maintenance nightmare
 - Up to ten lighted fields would be preferred to the current six
- Three phases were supposed to take place over six years but ended up taking 16
- Fields are operated in-house, their differentiator is their quality – there are some very good operators in the market that did not exist when they opened
- Input from soccer parents was a huge consideration in choosing amenities
- Concessions have never made money so it is viewed as more of a service - no merchandise is sold to limit funds being tied up in inventory
- There are no plans to build additional amenities – space is limited
- Grass fields average 800 – 900 hours per year, and synthetic turf averages 1,800 hours
- Ten tournaments (they own two of them, partner on five, rent fields for three)
- Development phase is very exciting and short-lived, while operating the facility is forever (important to spend time on this aspect)

Scheels Overland Park Soccer Complex

Location: Overland Park, KS

Owner / Operator: City of Overland Park

Notable Users: SBV/HSA Soccer Leagues

Pros: Profitable complex in 2016, good mix of local and tournament use, all turf facilities allow for higher utilization

Cons: Turf can get hot during summer months, parking and access to field issues, lack of updated amenities

Additional Info:

- 96 acres
- Opened in 2009
- Includes 12 lighted turf multipurpose fields, 1 basketball court, skate park, 3 tennis courts



2016 Overview:

- 21 tournaments in 2016, each averaged more than 210 teams
- Generated approximately 20,000 room nights with economic impact just over \$5 million
- Out of town teams account for 25 to 35% of total teams

Silverlakes Sports Complex

Location: Corona, CA

Owner: City of Norco

Operator: Balboa Management Group

Offerings:

- 24 Full size multipurpose fields
- 4 LED lit synthetic fields
- 12,000 SF outdoor cafe
- 10,000 capacity concert area – The Backyard
- 150 seat restaurant – The Fieldhouse
- Private banquet facility for 200

Performance

- Facility attracts more than one million attendees per year. Thanksgiving weekend saw more than 25,000 attendees to Norco (including many out of state). It is estimated that the facility generates 33,000 room nights per year.



Foley Sports Tourism Complex

Location: Foley, AL

Owner / Operator: City of Foley / Foley Recreation Department

Notable Users: USSSA Baseball / Softball, AAU Volleyball

Pros: Tournament-quality indoor and outdoor facility, good mix of local and tournament play, includes a championship multipurpose field

Cons: Despite location near a famous beach town, lack of destination appeal at the complex, & lack of support amenities (hotels, dining) surrounding the facility, parking and shading issues

Additional Info:

- Opened in 2016 for \$32 million
- 15 multipurpose fields (1 championship field), 90,000SF indoor multiuse events center (4 basketball courts)
- Generated approximately 15,000 room nights



Event Overview:

- 85 scheduled events across all sports in 2017
- 12 to 15 events planned in the events center
- Held the 2016 NIRSA National Soccer Championship

Chapter 7

Local Hotel Market Analysis

Hotel Supply – Within 10 Miles

- 3,160 hotel rooms located within 10 miles of DuPont

Property	DuPont Area Hotels			
	Distance	Rooms	Chain Scale	Open
Fairwood Inn & Suites	0.9	60	Indep	Jun-01
Best Western Liberty Inn Dupont	1.1	72	Midscale	Nov-04
Fairfield Inn & Suites Tacoma Dupont	1.1	90	Upper Midscale	Mar-17
Home2 Suites DuPont	1.3	140	Upper Midscale	Jun-17
Hampton Inn Suites Dupont	1.4	115	Upper Midscale	Jan-13
Best Western Plus Lacey Inn & Suites	6.3	85	Upper Midscale	Mar-11
Days Inn Lacey Olympia Area	6.5	124	Economy	May-96
La Casa Motel	6.5	20	Indep	Jan-00
Biltmore Motel	6.6	28	Indep	Jun-58
Madigan Motel	7.2	23	Indep	Aug-50
Holiday Inn Express & Suites Tacoma South Lakewood	7.4	121	Upper Midscale	Jun-07
Best Western Lakewood	7.4	78	Midscale	Jun-65
TownePlace Suites Tacoma Lakewood	7.5	119	Upper Midscale	Dec-17
Home Motel	7.6	25	Indep	Jan-00
Americas Best Value Inn Lakewood Tacoma S	8	54	Economy	Jan-01
Candlewood Suites Lakewood	8.4	83	Midscale	Jul-10
Western Inn	8.7	102	Indep	Jul-82
Days Inn Lakewood South Tacoma	8.9	77	Economy	Jun-90
La Quinta Inns & Suites Olympia Lacey	9.1	63	Midscale	Nov-95
Comfort Inn Lacey Olympia	9.2	69	Upper Midscale	Sep-93
Super 8 Lacey Olympia Area	9.2	98	Economy	Aug-80
Quality Inn & Suites Lacey	9.2	77	Midscale	Jun-90
Ramada Olympia	9.3	125	Midscale	Sep-00
Holiday Inn Express Lacey	9.5	81	Upper Midscale	Oct-07
Candlewood Suites Olympia Lacey	9.5	62	Midscale	Jul-07
Hampton Inn & Suites Olympia Lacey	9.5	121	Upper Midscale	Oct-16
Quality Inn & Suites Tacoma Seattle	9.8	115	Midscale	Jul-15
Econo Lodge Tacoma Mall	9.8	104	Economy	May-92
Howard Johnson Inn & Suites Tacoma Near McChord AFB	9.9	67	Economy	Jun-83
American Lodge	9.9	55	Indep	Oct-06
Travelodge Tacoma Near McChord AFB	9.9	86	Economy	Jun-75
Crossland Economy Studios Tacoma Hosmer	9.9	128	Economy	Jan-99
Rothem Inn	9.9	30	Indep	Jun-93
Comfort Inn Tacoma Seattle	10	90	Upper Midscale	Apr-00
Redwood Motel	10	25	Indep	Feb-57
Holiday Inn Tacoma Mall	10	124	Upper Midscale	Jun-67
Holiday Inn Express & Suites Tacoma	10	78	Upper Midscale	Mar-98
Hampton Inn Suites Tacoma Mall	10	146	Upper Midscale	Nov-07
Total/Average	7.8	3,160	--	May-90

Source: Smith Travel Research

Competitive Set

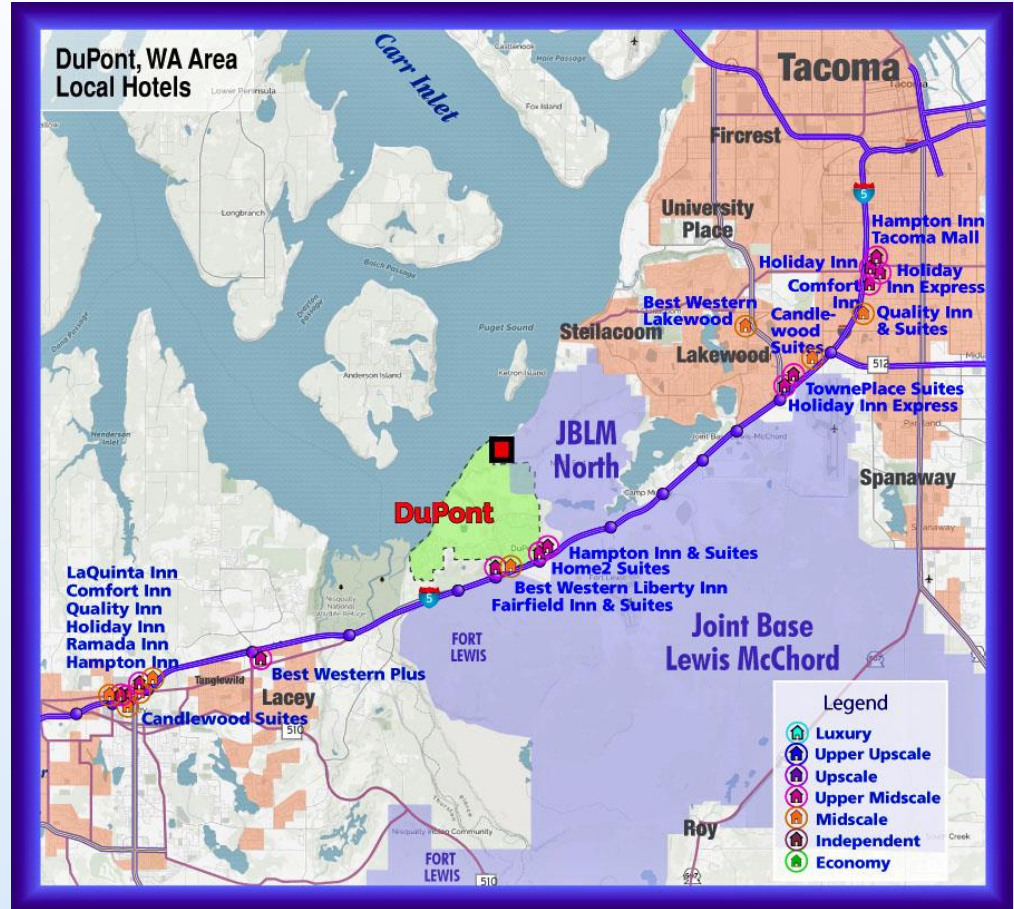
- Competitive set primarily consists of midscale and upscale branded select-service hotels – attractive to tournament organizers and youth sports teams

Competitive Set Hotels				
Property	Distance	Rooms	Chain Scale	Open
Best Western Liberty Inn Dupont	1.1	72	Midscale	Nov-04
Fairfield Inn & Suites Tacoma Dupont	1.1	90	Upper Midscale	Mar-17
Home2 Suites DuPont	1.3	140	Upper Midscale	Jun-17
Hampton Inn Suites Dupont	1.4	115	Upper Midscale	Jan-13
Best Western Plus Lacey Inn & Suites	6.3	85	Upper Midscale	Mar-11
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Comfort Inn Lacey Olympia	9.2	69	Upper Midscale	Sep-93
Quality Inn & Suites Lacey	9.2	77	Midscale	Jun-90
Ramada Olympia	9.3	125	Midscale	Sep-00
Holiday Inn Express Lacey	9.5	81	Upper Midscale	Oct-07
Candlewood Suites Olympia Lacey	9.5	62	Midscale	Jul-07
Hampton Inn & Suites Olympia Lacey	9.5	121	Upper Midscale	Oct-16
Quality Inn & Suites Tacoma Seattle	9.8	115	Midscale	Jul-15
Comfort Inn Tacoma Seattle	10	90	Upper Midscale	Apr-00
Holiday Inn Tacoma Mall	10	124	Upper Midscale	Jun-67
Holiday Inn Express & Suites Tacoma	10	78	Upper Midscale	Mar-98
Hampton Inn Suites Tacoma Mall	10	146	Upper Midscale	Nov-07
Total/Average	7.5	2054	--	Mar-03

Source: Smith Travel Research

Map

- 5 hotels totaling 477 rooms located in DuPont
- 230 rooms opened in DuPont in last 18 months:
 - 90-room Fairfield Inn and Suites
 - 140-room Home2 Suites



Hotel Performance

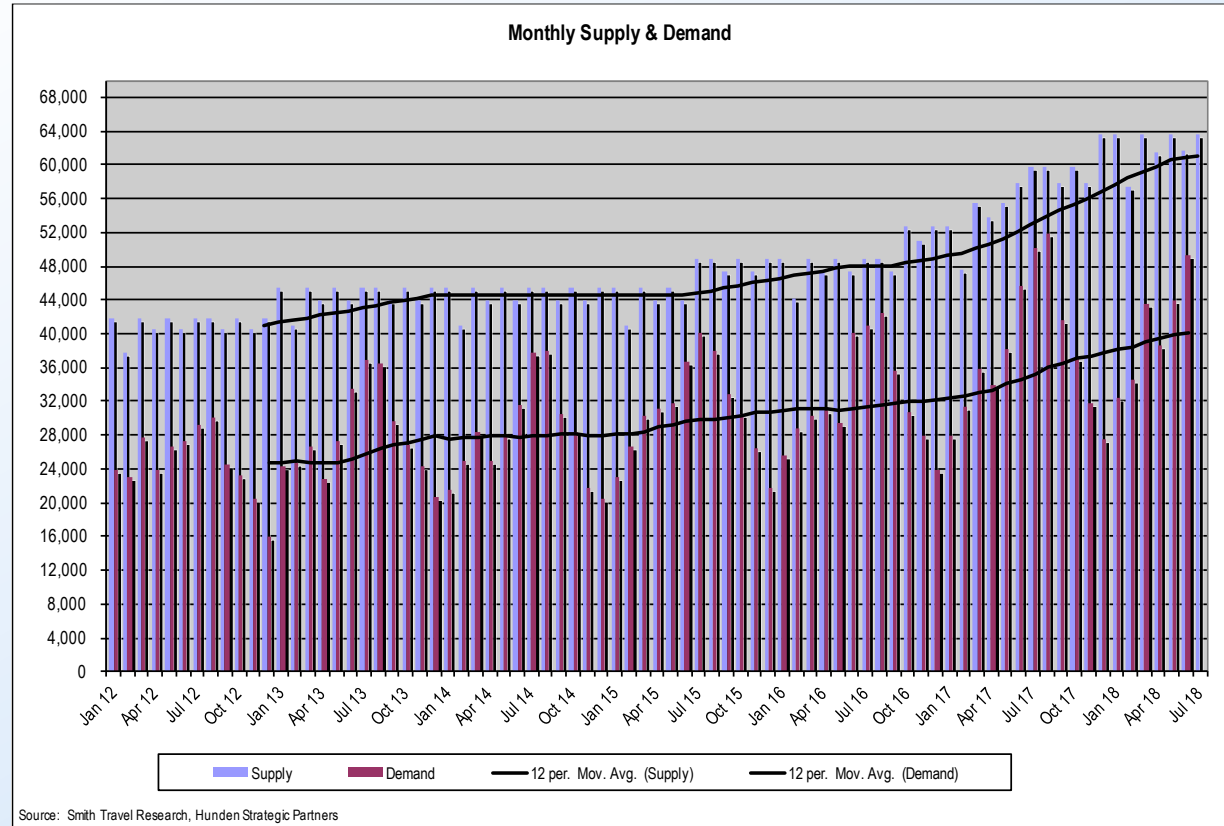
- Growth in room night demand over last two years
- Market is demonstrating attractive rates for weekend tournaments and other events

Historical Supply, Demand, Occupancy, ADR, and RevPar for Competitive Hotels											
Year	Annual Avg. Available Rooms	Available Room Nights	% Change	Room Nights Sold	% Change	% Occ.	% Change	ADR	% Change	RevPar	% Change
2013	1,464	534,360	--	334,188	--	62.5	--	\$99.19	--	\$62.03	--
2014	1,464	534,360	0.0%	335,727	0.5%	62.8	0.5%	\$102.01	2.8%	\$64.09	3.3%
2015	1,522	555,520	4.0%	369,107	9.9%	66.4	5.8%	\$107.02	4.9%	\$71.11	11.0%
2016	1,609	587,467	5.8%	386,604	4.7%	65.8	-1.0%	\$106.63	-0.4%	\$70.17	-1.3%
2017	1,868	681,689	16.0%	452,875	17.1%	66.4	1.0%	\$108.24	1.5%	\$71.91	2.5%
2018 YTD (August)	2,352	498,522	12.7%	347,951	10.5%	69.8	-1.9%	\$112.32	2.4%	\$78.39	0.5%
CAGR* (2013-2017)	6.9%	6.9%	--	8.9%	--	1.6%	--	2.3%	--	4.0%	--

*Compound Annual Growth Rate
Sources: Smith Travel Research, Hunden Strategic Partners

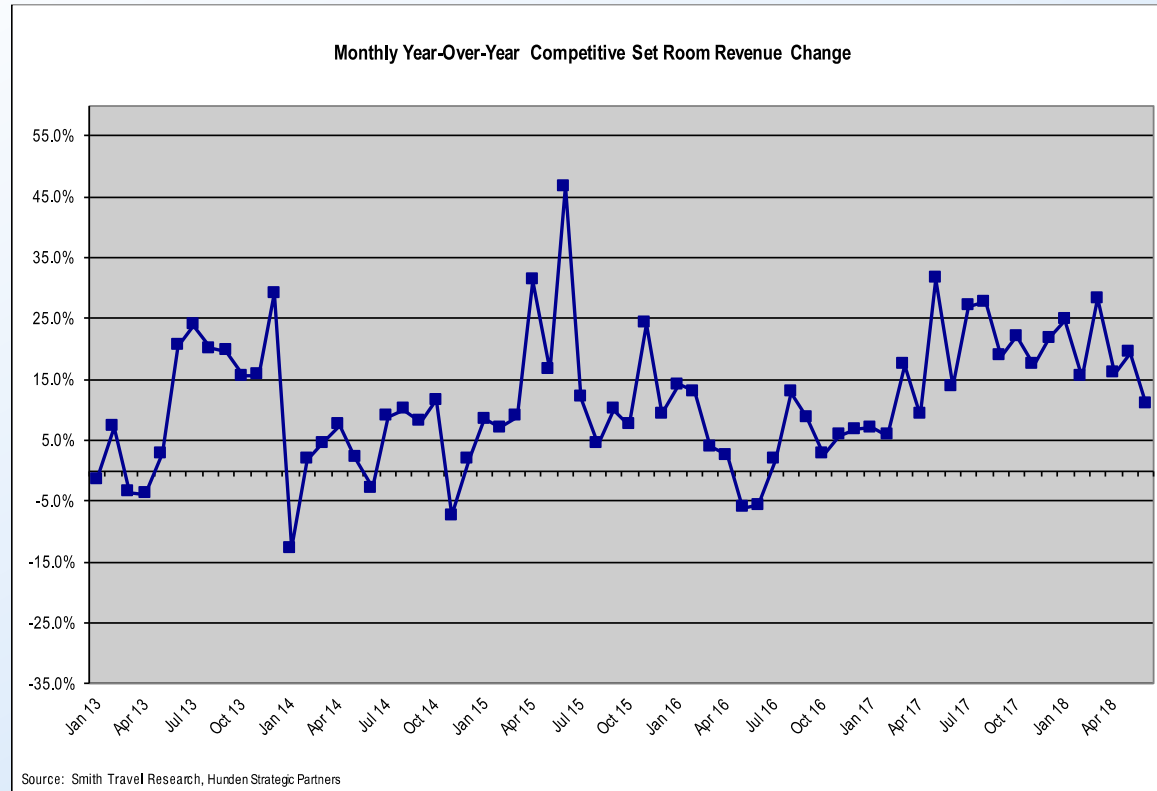
Supply and Demand

- Increase in supply followed by increase in demand – suggests pent up demand in the market



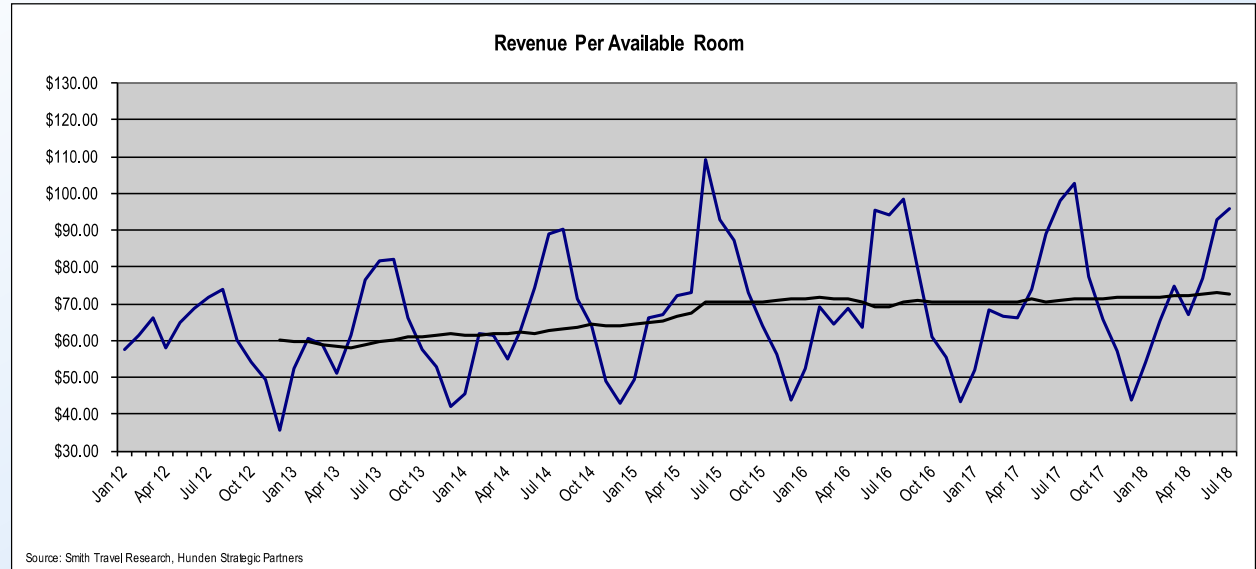
Room Revenue Change

- Points above x-axis represent year-over-year room revenue growth for that month, Below the line means room revenue decay
- Growth has been positive since July 2016



Revenue Per Available Room

- $\text{RevPAR} = \text{occupancy} \times \text{rate}$



Heat Charts

- Largest events occurring on the weekends in summer months – new hotel development will likely be necessary to support proposed sports complex
- Primary gaps occur on the weekend in the fall, winter, and spring – opportunity for major three-day events

Occupancy Percent by Day of Week by Month - September 2017 - August 2018

	Sunday	Monday	Tuesday	Wednesday	Thursday	Friday	Saturday	Avg
Sep - 17	60.3%	68.4%	76.5%	77.0%	69.0%	71.4%	78.8%	71.9%
Oct - 17	49.0%	60.9%	68.0%	68.2%	60.6%	63.7%	65.6%	62.0%
Nov - 17	42.1%	52.4%	58.7%	59.6%	55.9%	59.5%	55.2%	55.0%
Dec - 17	36.1%	49.1%	51.8%	48.5%	39.2%	40.9%	40.8%	43.3%
Jan - 18	40.6%	45.9%	57.8%	61.9%	52.2%	48.7%	48.2%	51.2%
Feb - 18	43.4%	56.3%	67.6%	71.1%	63.1%	60.1%	60.1%	60.2%
Mar - 18	53.2%	69.5%	76.2%	76.4%	67.0%	66.8%	70.0%	68.4%
Apr - 18	46.1%	63.7%	70.5%	70.5%	60.3%	63.0%	70.0%	62.9%
May - 18	51.8%	65.2%	73.8%	74.4%	70.7%	71.6%	71.9%	68.9%
Jun - 18	61.7%	78.7%	85.5%	85.3%	80.5%	82.6%	84.7%	80.1%
Jul - 18	67.9%	79.6%	83.6%	82.8%	80.3%	88.7%	91.8%	81.6%
Aug - 18	70.2%	80.9%	86.8%	88.3%	82.1%	86.1%	93.4%	84.1%
Average	51.7%	64.2%	71.4%	72.0%	65.4%	67.2%	69.2%	

Sources: Smith Travel Research

	75-80
	80-90
	> 90

Heat Charts

- Minimal variation in rate – overall rates are attractive for event and tournament organizers

ADR by Day of Week by Month - September 2017 - August 2018

	Sunday	Monday	Tuesday	Wednesday	Thursday	Friday	Saturday	Avg
Sep - 17	101.67	109.24	111.93	111.16	108.49	104.32	105.48	107.45
Oct - 17	101.50	108.00	111.03	109.41	105.67	102.18	101.10	105.90
Nov - 17	99.05	104.89	107.08	106.78	102.50	102.57	104.68	104.18
Dec - 17	97.16	104.51	106.21	105.18	100.53	96.56	96.60	101.00
Jan - 18	100.69	108.48	110.04	110.51	103.72	100.07	98.48	105.49
Feb - 18	102.46	106.65	109.71	110.98	110.11	109.45	106.57	108.34
Mar - 18	105.29	111.99	114.12	114.64	109.89	104.21	105.62	109.40
Apr - 18	101.76	109.19	112.39	110.94	105.59	102.10	103.29	106.74
May - 18	103.61	113.79	114.72	116.31	111.83	109.20	107.03	111.55
Jun - 18	107.02	116.80	121.23	121.22	114.90	113.77	113.83	115.75
Jul - 18	106.70	117.69	121.37	121.47	116.21	119.09	117.49	117.30
Aug - 18	107.62	121.22	123.38	122.30	114.72	115.71	119.42	118.04
Average	103.41	111.88	114.46	114.31	109.68	107.96	107.99	

Sources: Smith Travel Research

	110-120
	120-130
	> 130

Hotelier Feedback

- There are always rooms available from October through March unless there is an event – Washington State Fair and events at Tacoma Dome
- Strong corporate base – JBLM and hospitals – market is midweek corporate driven (up to 85 percent driven by JBLM)
- Summer leisure – golf is the primary room night driver
- Events in Tacoma cause significant compression in DuPont – minimal impact from RAC
- Number of rooms in the market has doubled in last 16 months – JBLM is driving the growth
- This project would be a complete game changer for the hotel market – areas needs additional weekend demand generators
- DuPont is marketed as safe and quiet – could be challenged by local residents who do not want traffic and visitors
- Primary opportunity in DuPont is on weekends – ideal for hosting major tournaments

Chapter 8

Recommendations

Recommendations

- **Fields.** 26 regulation fields (approximately 16 lighted fields - 345' x 210'), including one championship field with seating to create a stadium atmosphere. This offers sufficient fields for competition and practice during events. The field mix is suggested to be 19 synthetic turf fields and six natural grass fields.
- **Parking.** Common concern of tournament organizers is not enough parking. A common metric used for athletic facilities is to allocate 100 parking spaces per field. In order to accommodate the parking needs for the recommended facilities, 2,600 parking spaces (26 acres) would need to be programmed onsite.
- **Food and Beverage.** HSP recommends the inclusion of a restaurant/coffee shop that features a rooftop area for enhanced spectator viewing beyond traditional concessions. Two concessions and restroom buildings are recommended
- **Changing/locker rooms should be provided.** These could be designed into the concession and restroom buildings
- **Areas for event organizers and staff.** Event organizers need locations for event headquarters to conduct their business and meetings. Also, tournament officials and referees regularly do not have a base location from which to change or operate. Two small meeting rooms, with bathrooms, should be provided for each sport.
- **Governing Bodies.** It is recommended that governing bodies continue to be consulted for their facility assistance resources in the design and layout process. Governing bodies such as USA Soccer provide services to optimize the highest and best use for each particular sports facility design and layout, in accordance with their facility specifications.

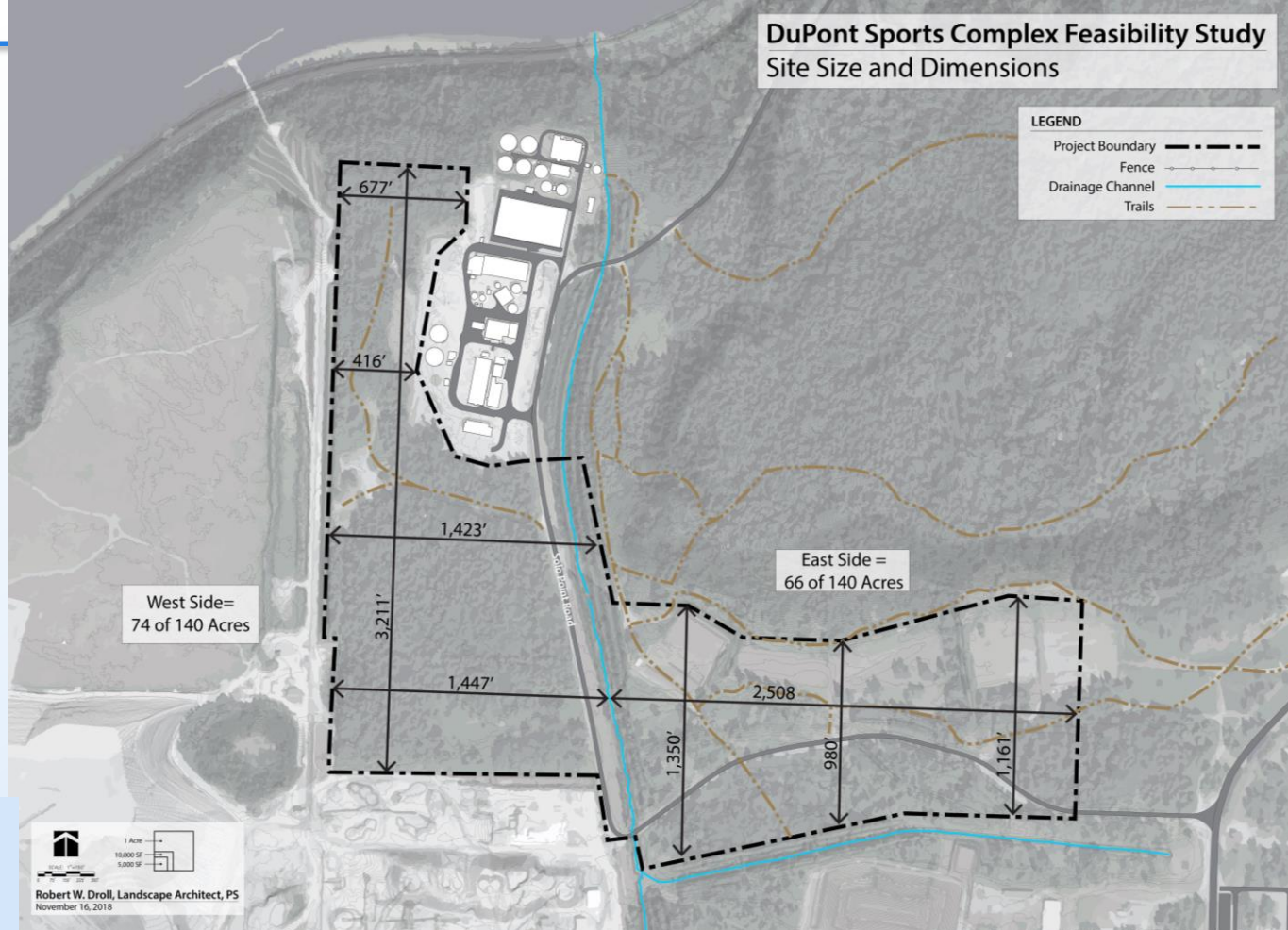
Chapter 9

Site Analysis

Boundary/Site Size

- Project Boundary is schematic - founded upon Site Conditions & meeting Program Requirements
- Ell-shape project site configuration
- Project site configuration is less than ideal

Finding: site size & configuration is adequate to meet project demand



Site Structures & Features

- Primary Drainage Channel
- Secondary Drainage Channels
- Concrete Walls
- Concrete Slabs
- Maintenance Roads- Gravel & Asphalt
- Concrete Jersey Barriers
- Concrete Bridge over Drainage Channel
- Earthen Berms
- Firing Ranges

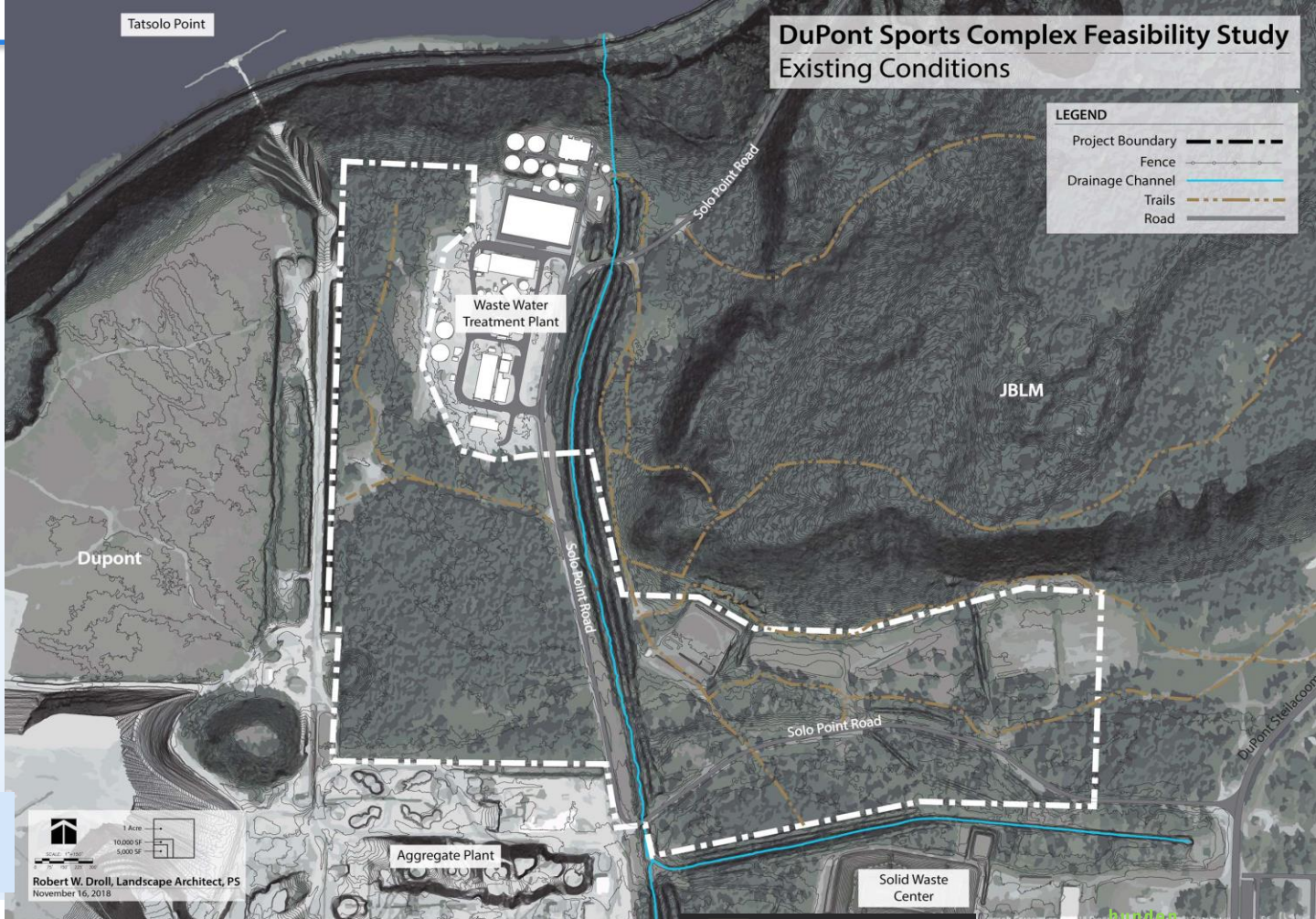
Finding: Site Structures & Features
will not inhibit development



Existing Conditions

- Man-made Drainage Channel divides site into East/West areas
- Both areas offer topography conducive to project demands
- Asarco plume and Firing Range spent munitions may pose a limiting site factor
- Good wind and solar exposure

Finding: No apparent limiting existing conditions

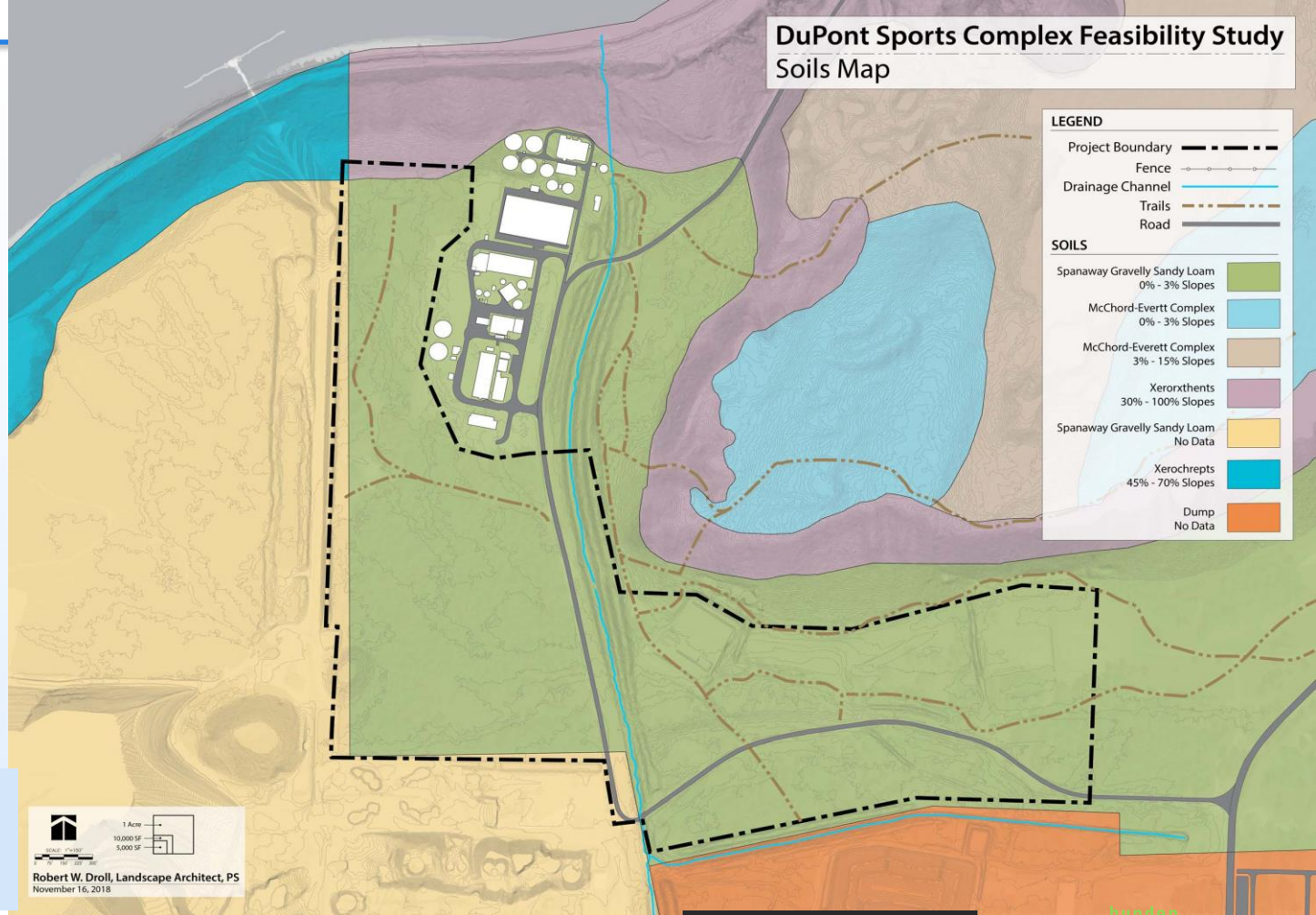


Soils

- Spanaway Gravelly Sandy Loam is the dominant soil type
- Good drainage, structure, & bearing capacity characteristics
- Contains a high percentage of cobbles: hard to fine grade
- Lack organics

Finding: Soil Type is conducive to project development

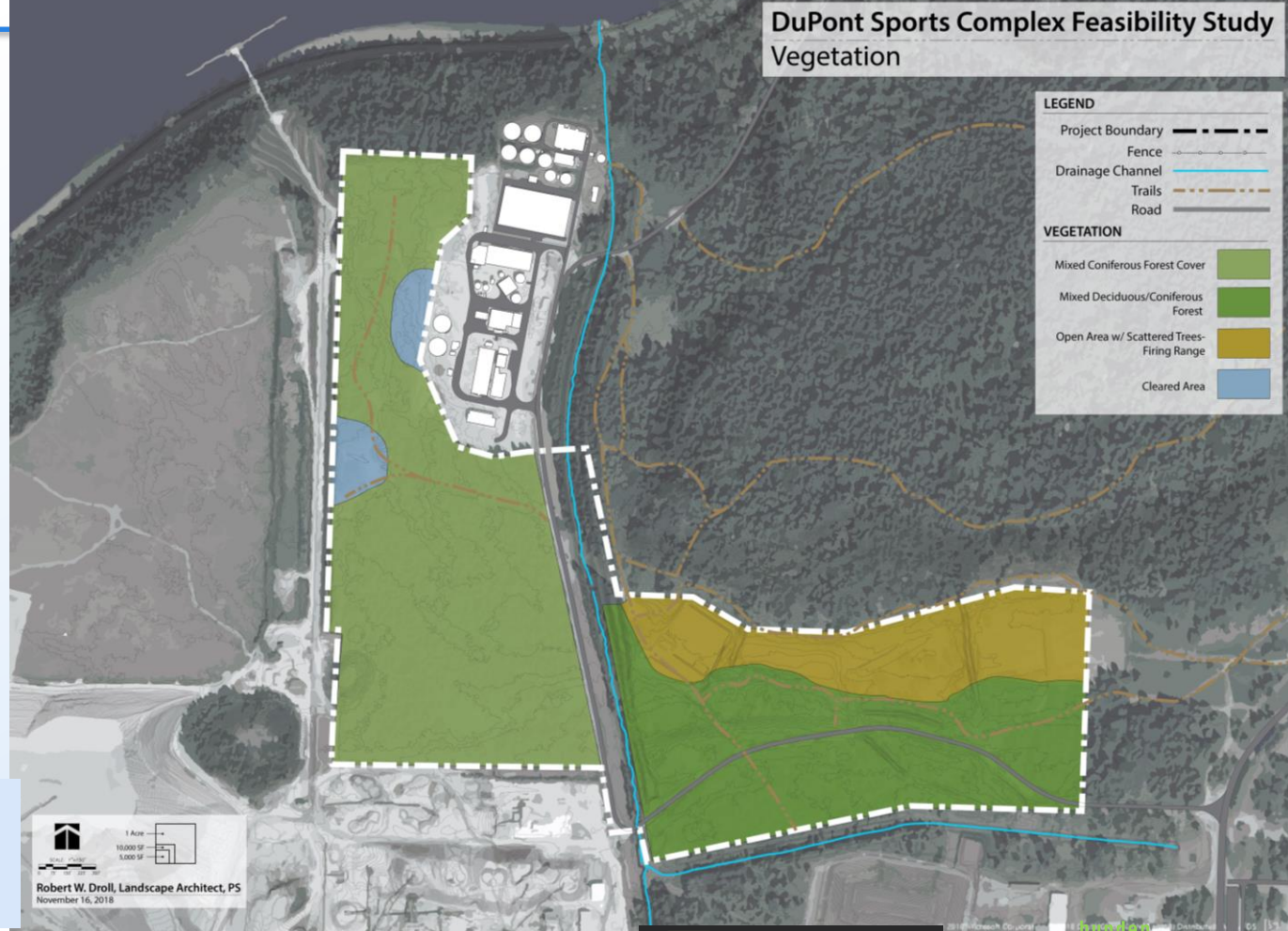
DuPont Sports Complex Feasibility Study Soils Map



Vegetation

- Site is predominantly forested- appears to be second growth
- May be some marketable timber
- Garry Oak is scattered throughout the East area
- Reed Canary Grass abundant along Drainage Channel
- No apparent wetland species

Finding: Vegetation is not a limiting development factor, except for Garry Oaks



Vegetation

Overstory

- Douglas Fir
- Garry Oak
- Cascara
- Pacific Madrone
- Serviceberry
- Cottonwood

Understory

- Oceanspray
 - Ninebark
 - Salal
 - Evergreen Blueberry
 - Low Leaf Oregon Grape
 - Sword Fern
 - Bracken Fern
-
- Finding: Vegetation indicative of Upland Habitat, Well Draining Soils



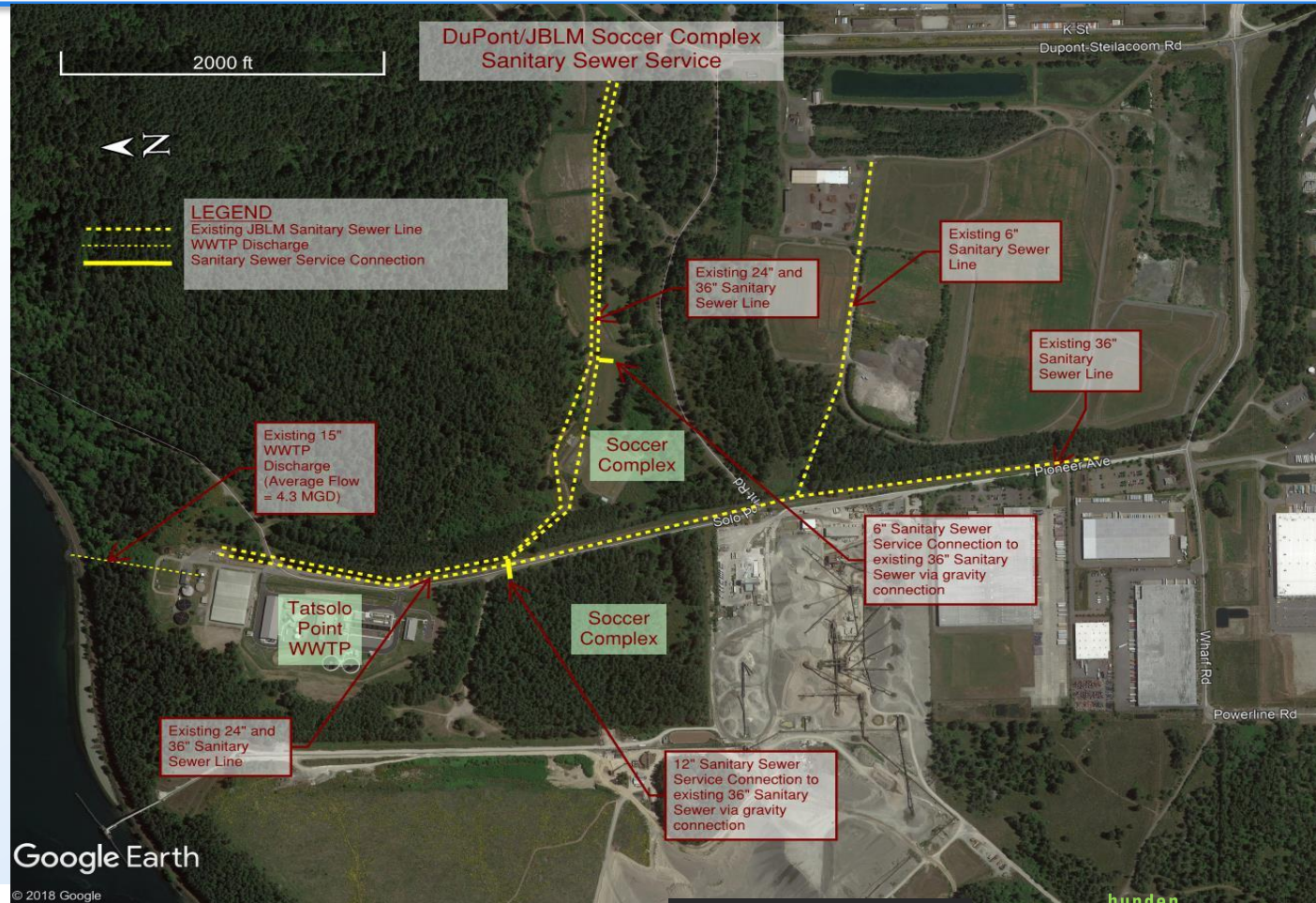
Traffic

- 2-Lanes in each direction along DuPont-Steilacoom Rd. from Wharf Rd. to Wilmington Dr. with turn lanes where needed
- 1-Lane in each direction along relocated Solo Point Road with turn lanes into site
- Traffic Signal or roundabout located at intersection of DuPont-Steilacoom Road and Solo Point Road
- Assumes "Event Traffic to be flagger controlled after event"
- "Event Traffic" to exit via Solo Point Road and maintenance access



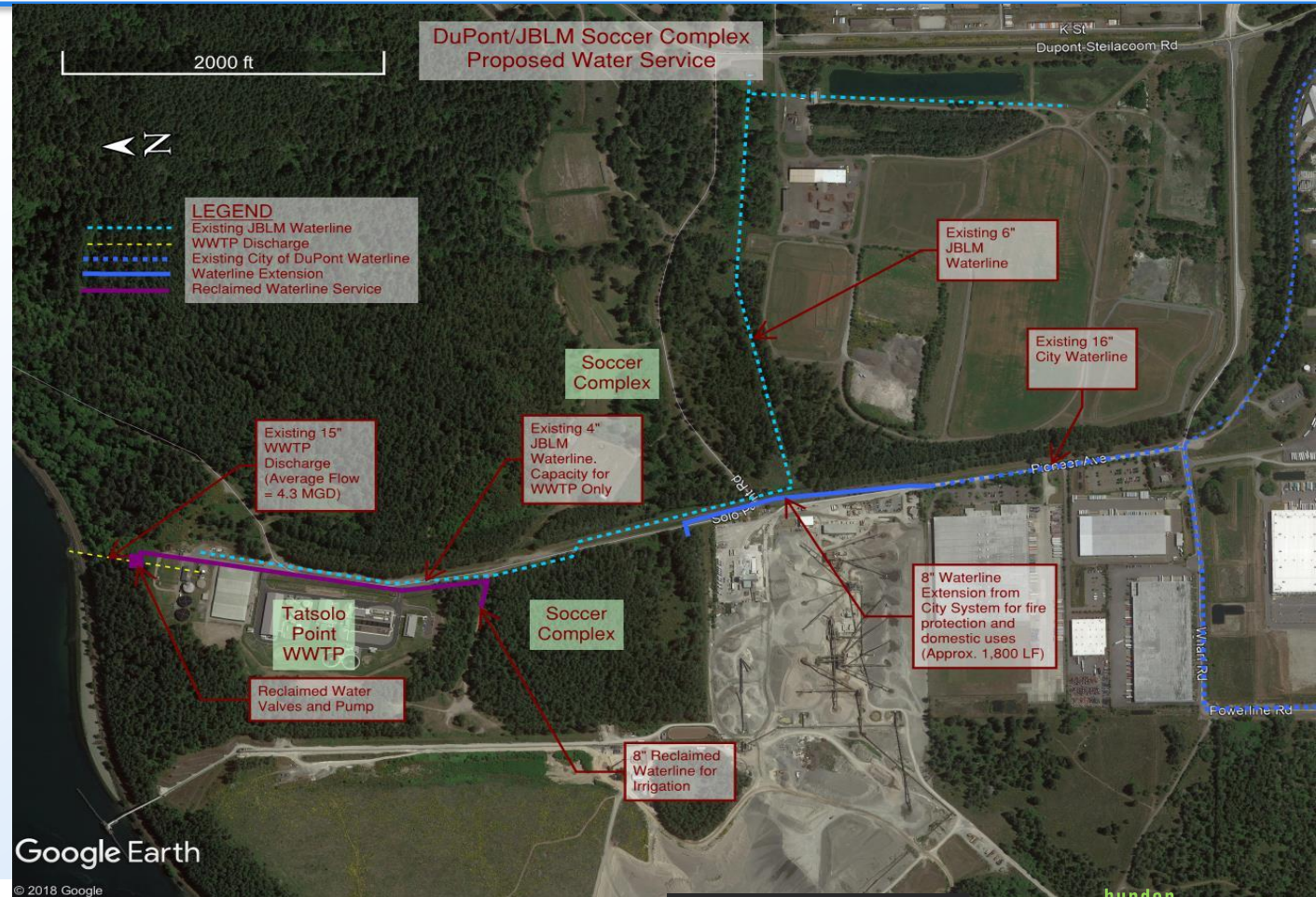
Sanitary Sewer

- Existing JBLM 36" sewer has adequate depth and capacity to facilitate gravity service connection(s)
- Existing Tatsolo Point Waste Water Treatment Plant discharges approximately 4.3 MGD



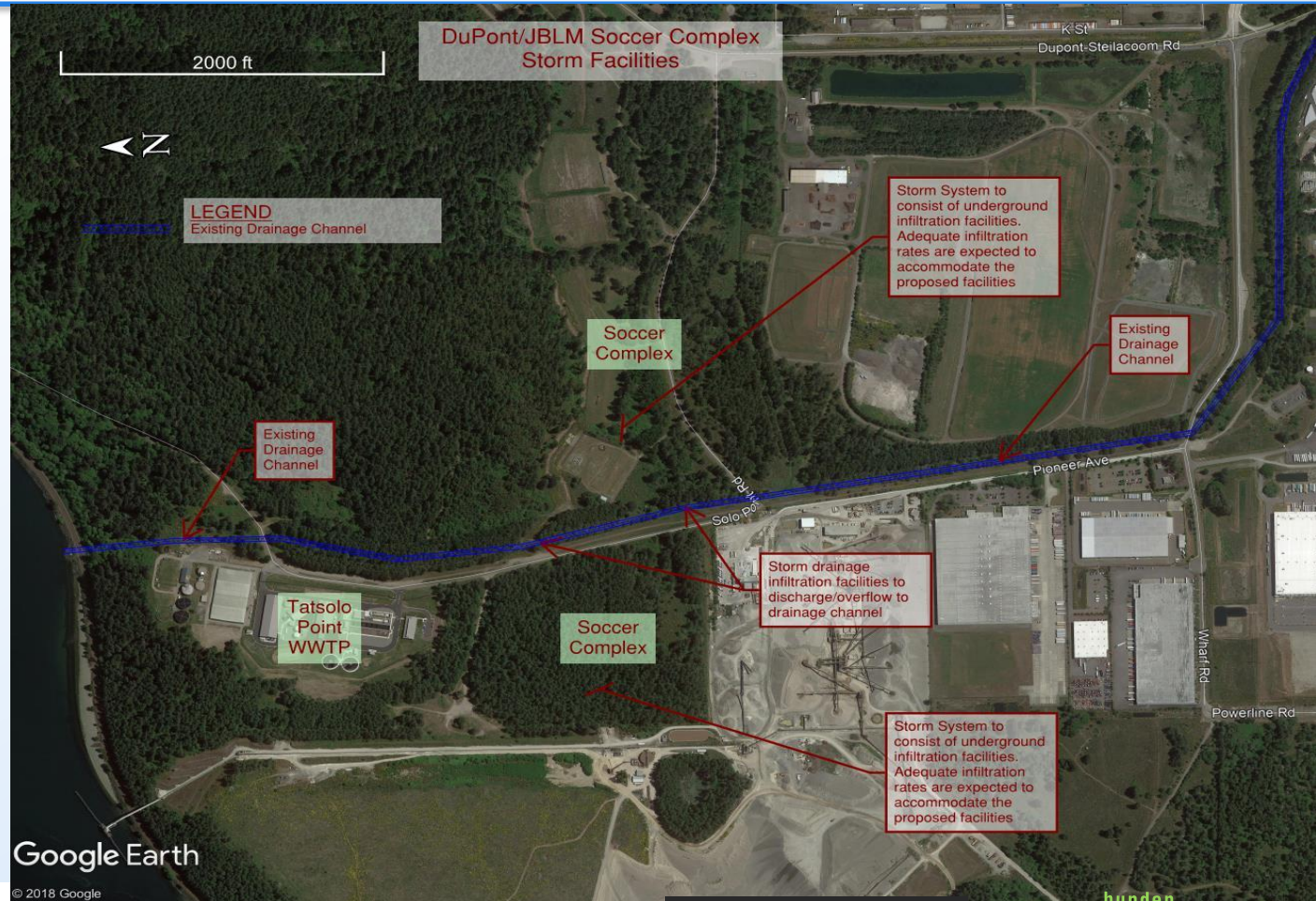
Potable Water

- Existing 6"/4" JBLM water line servicing the Tatsolo Point WWTP is not sized to accommodate domestic and fire demands for the proposed Soccer Complex
- Domestic and Fire water service by extending a new 8" waterline approximately 1,800 LF, from the existing 16" City of DuPont waterline south of the proposed soccer complex



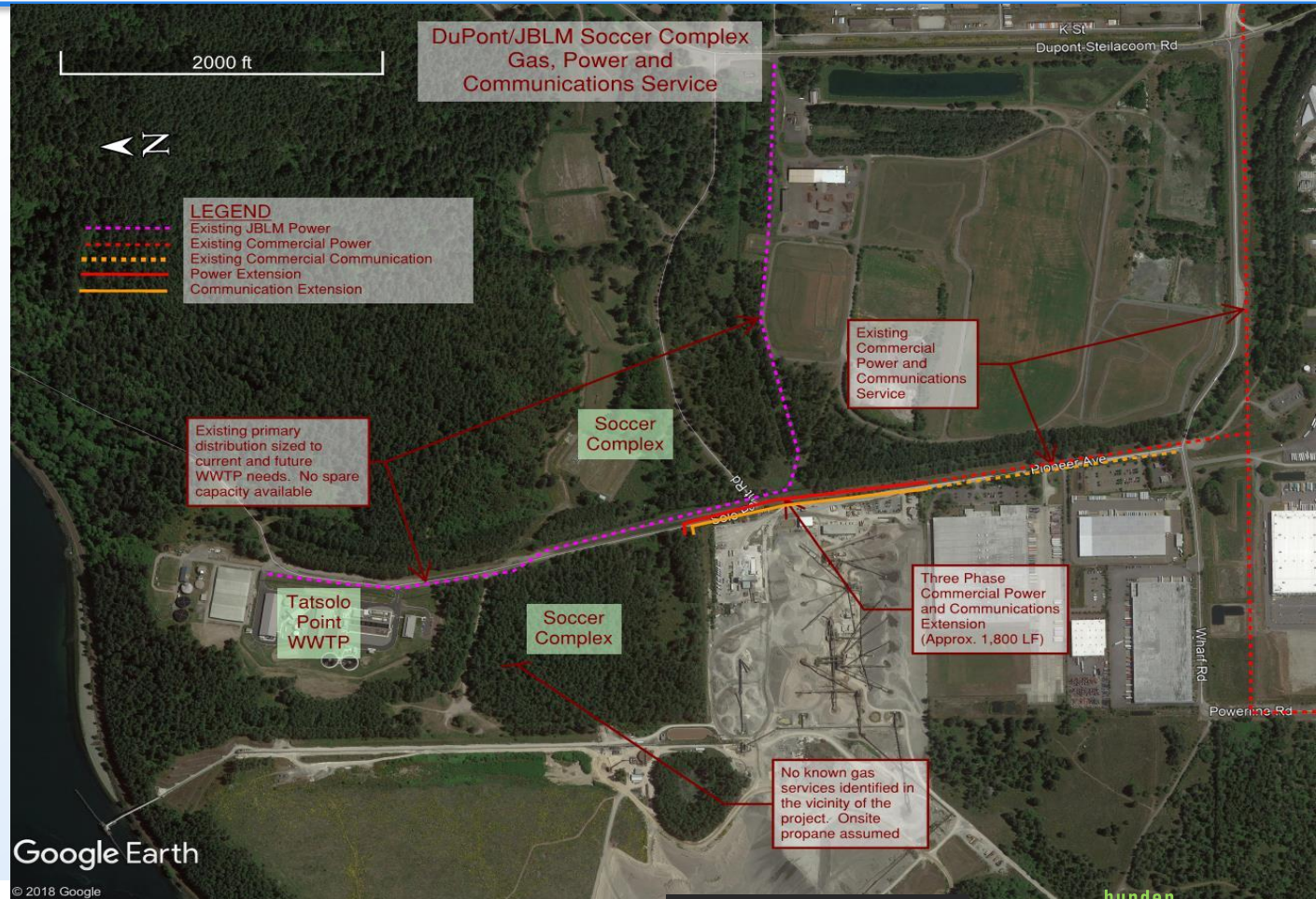
Storm Water

- Site soils are expected to accommodate infiltration facilities
- Storm system to consist of underground infiltration facilities sized to accommodated developed flow rates and water quality requirements
- Storm facilities to discharge/overflow to the existing drainage channel adjacent to Solo Point Road (if necessary)

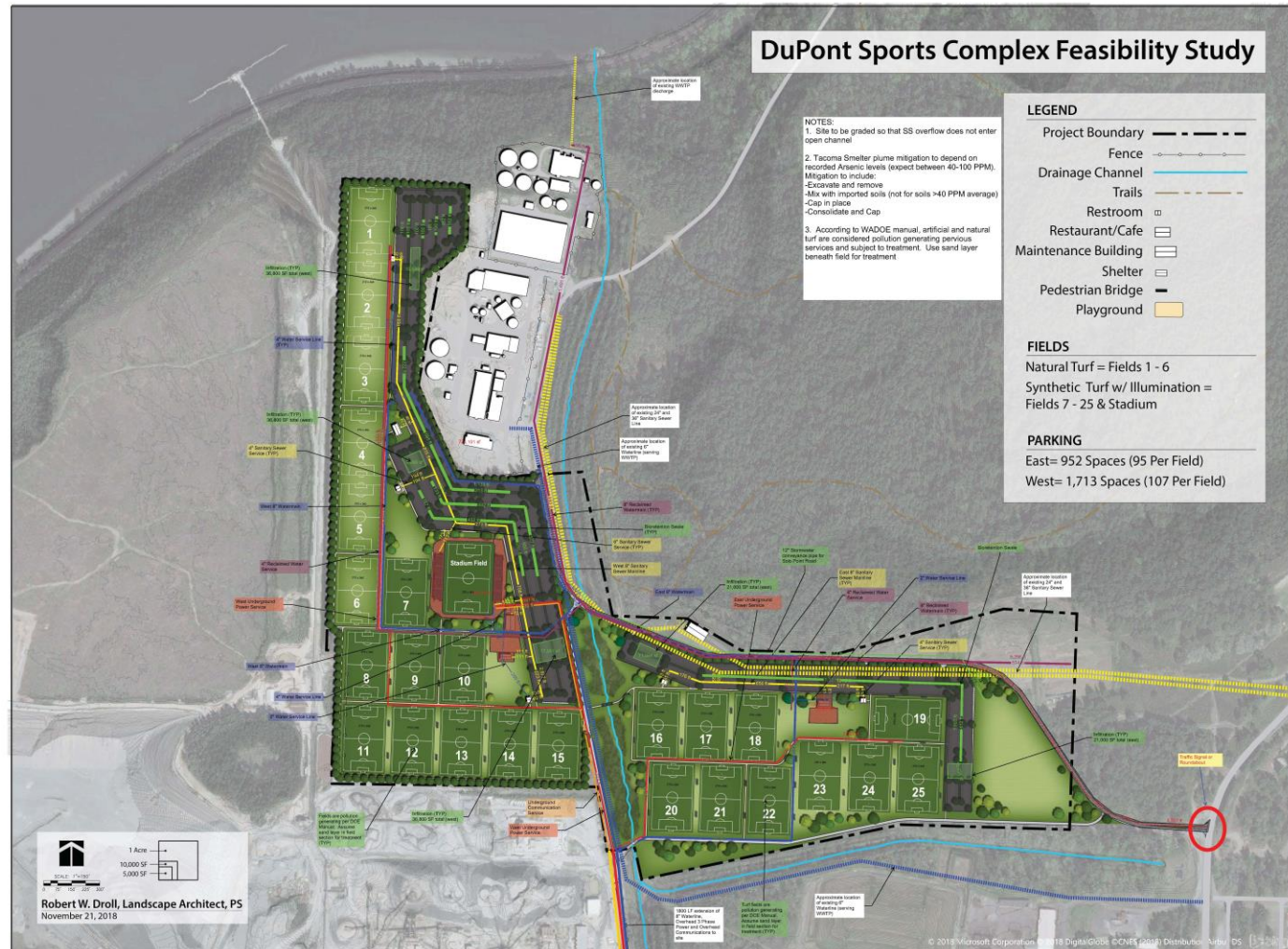


Gas, Power & Comm

- No gas services have been identified in the vicinity of the project
- Existing primary distribution to the Tatsolo Point WWTP is not adequately sized to meet project needs
- Existing three phase commercial power and communication lines to be extended approximately 1,800 LF, from the existing facilities south of the proposed soccer complex



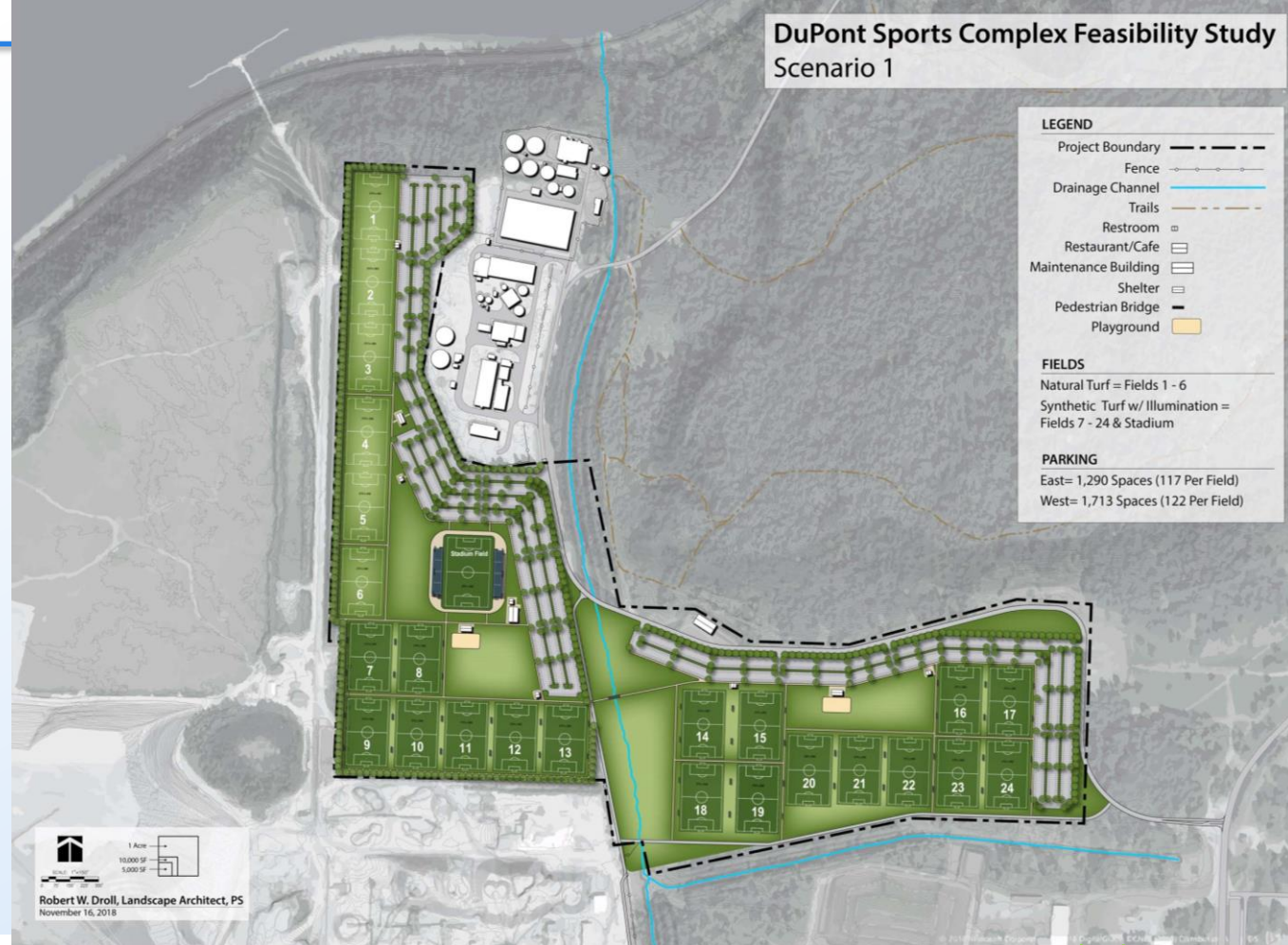
DuPont Sports Complex Feasibility Study



Chapter 10

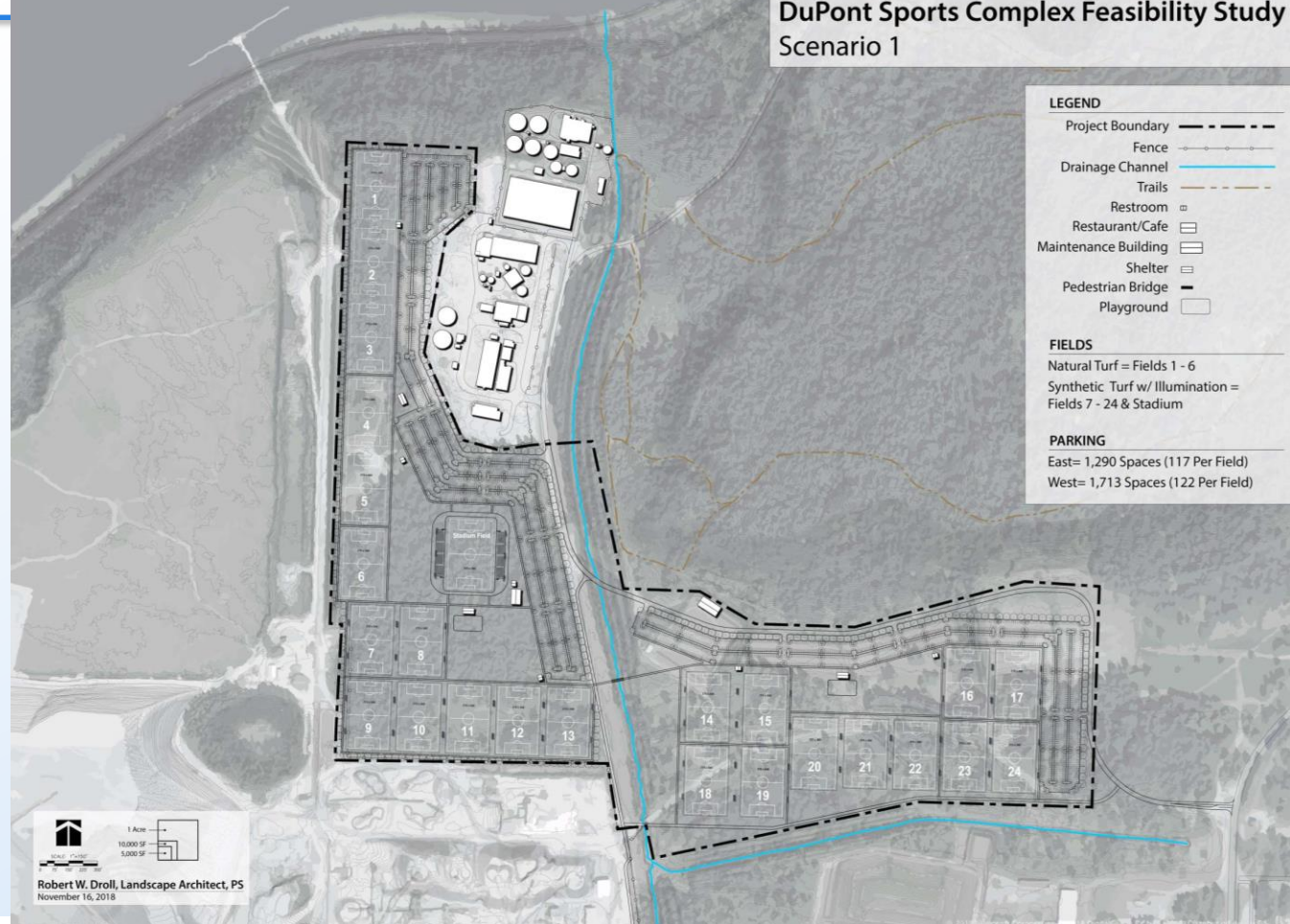
Concept Site Plan

Scenario 1

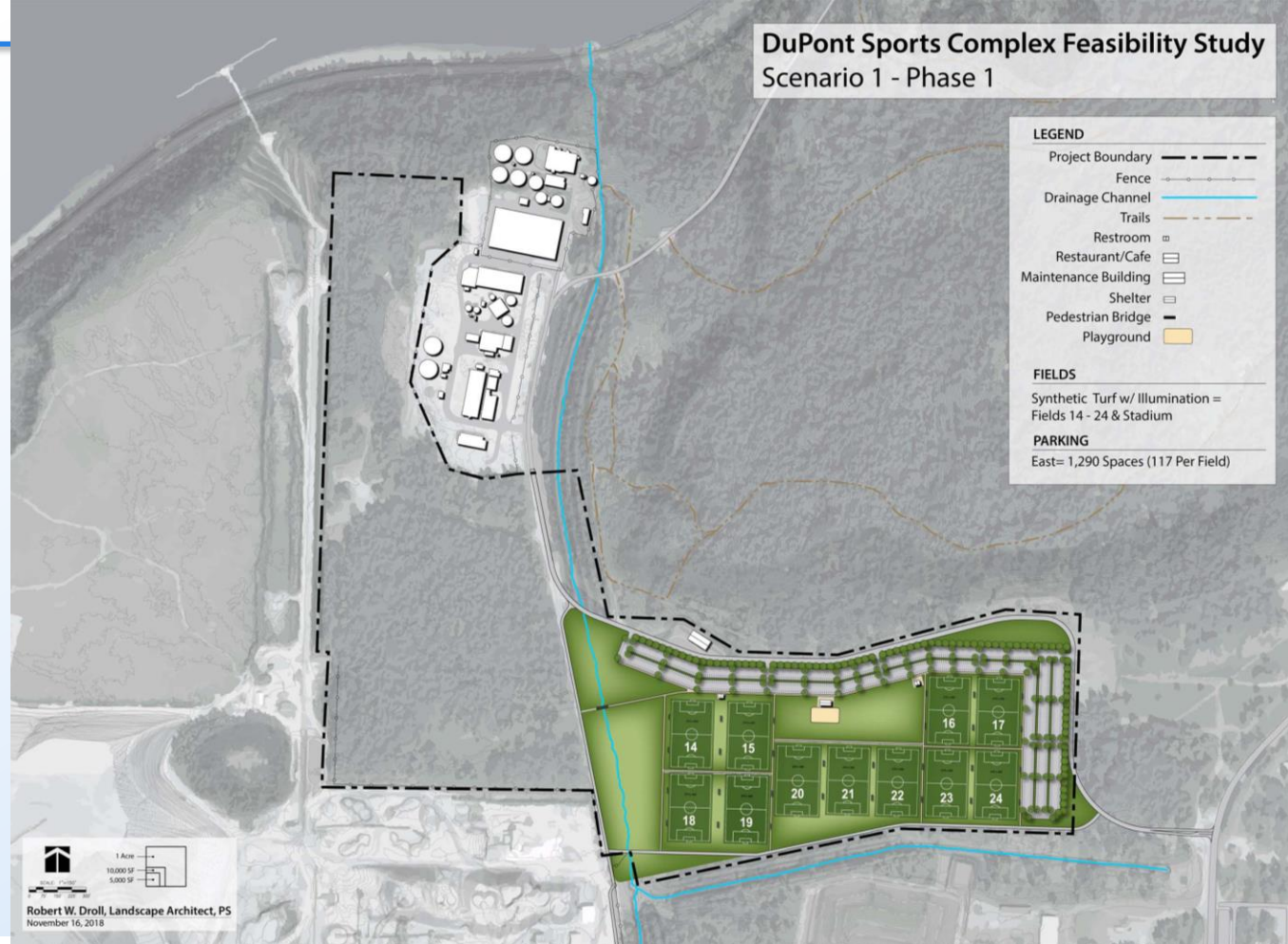


Scenario 1

DuPont Sports Complex Feasibility Study Scenario 1

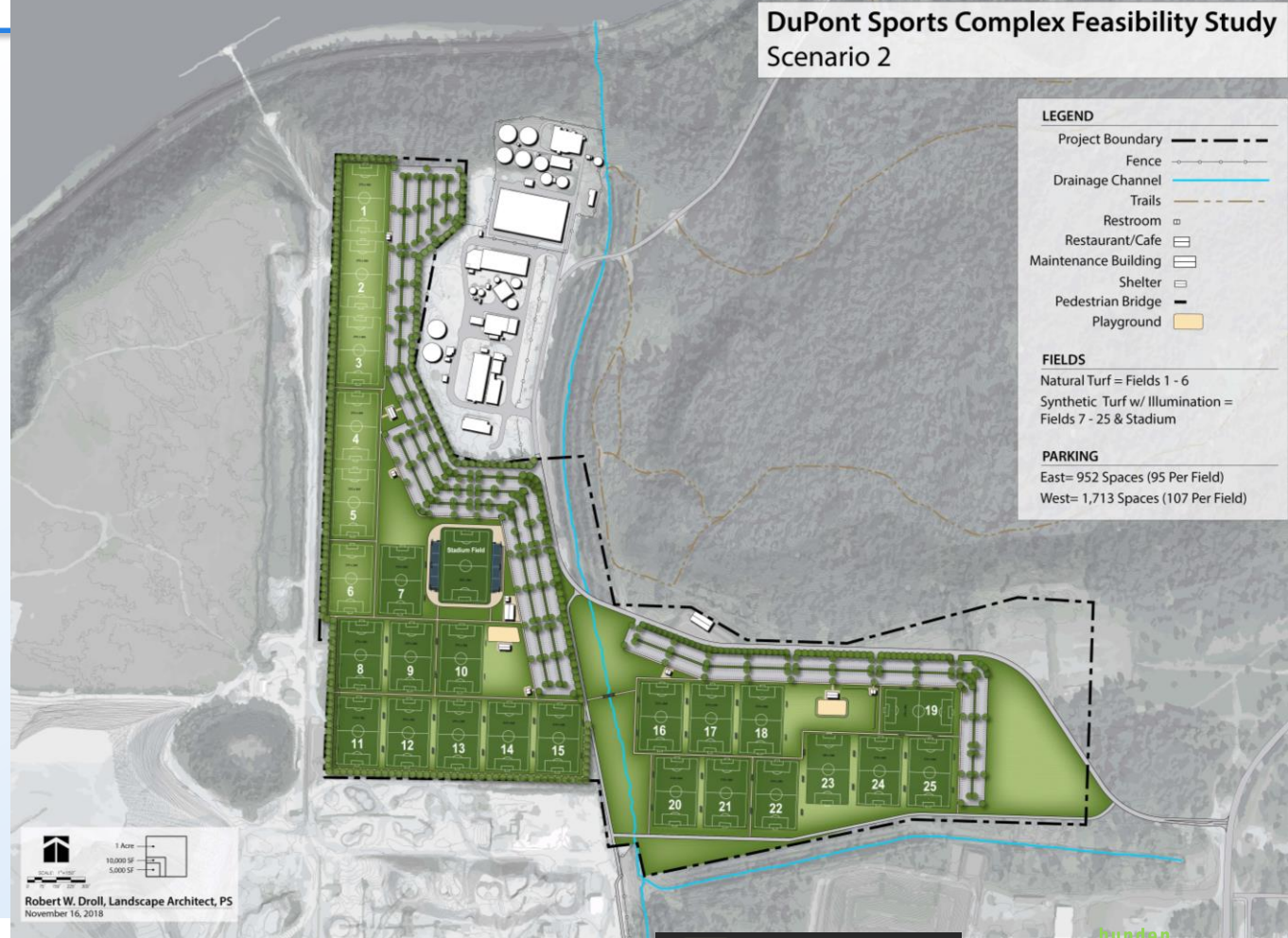


Scenario 1



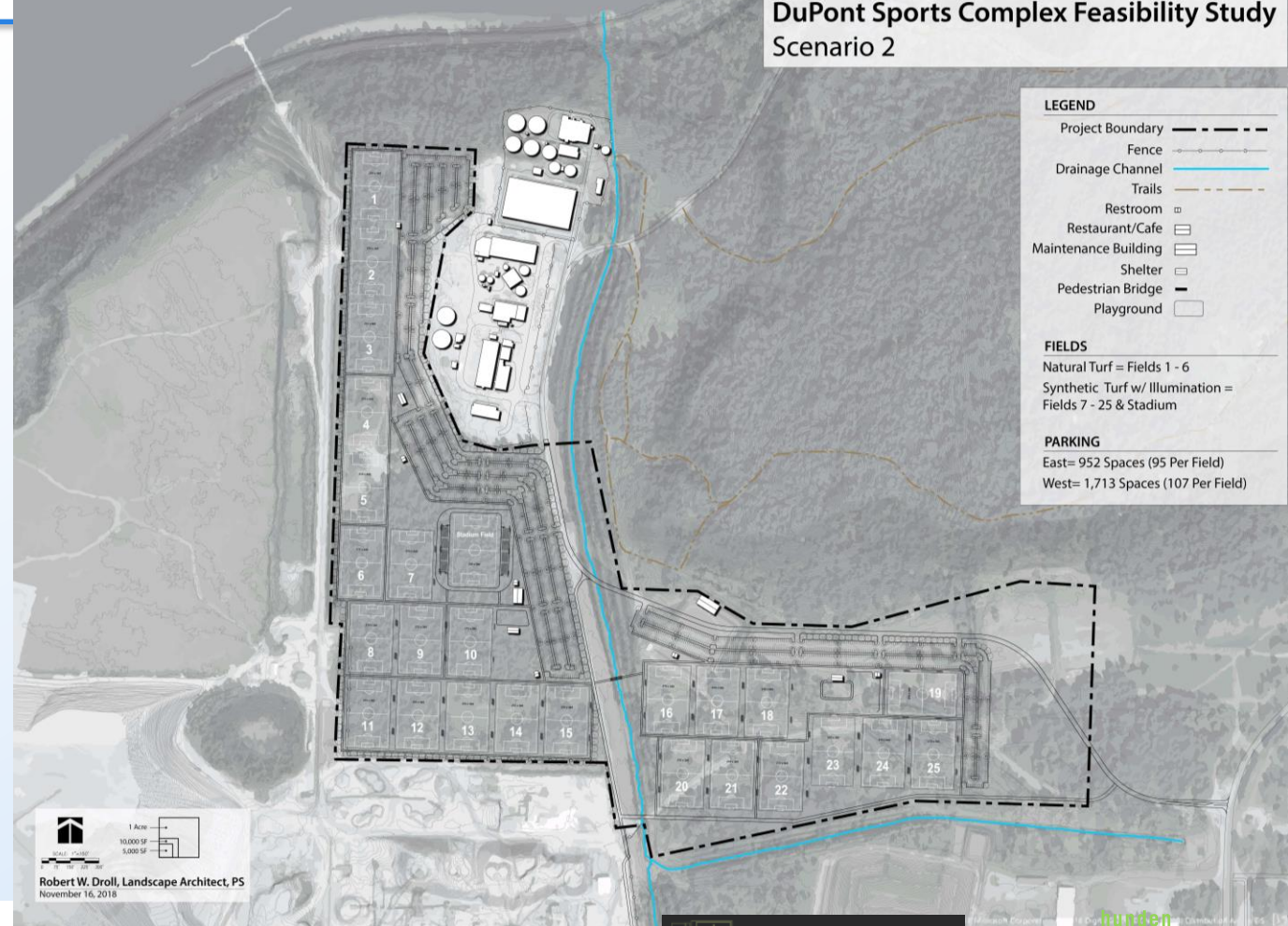
Scenario 2

DuPont Sports Complex Feasibility Study Scenario 2

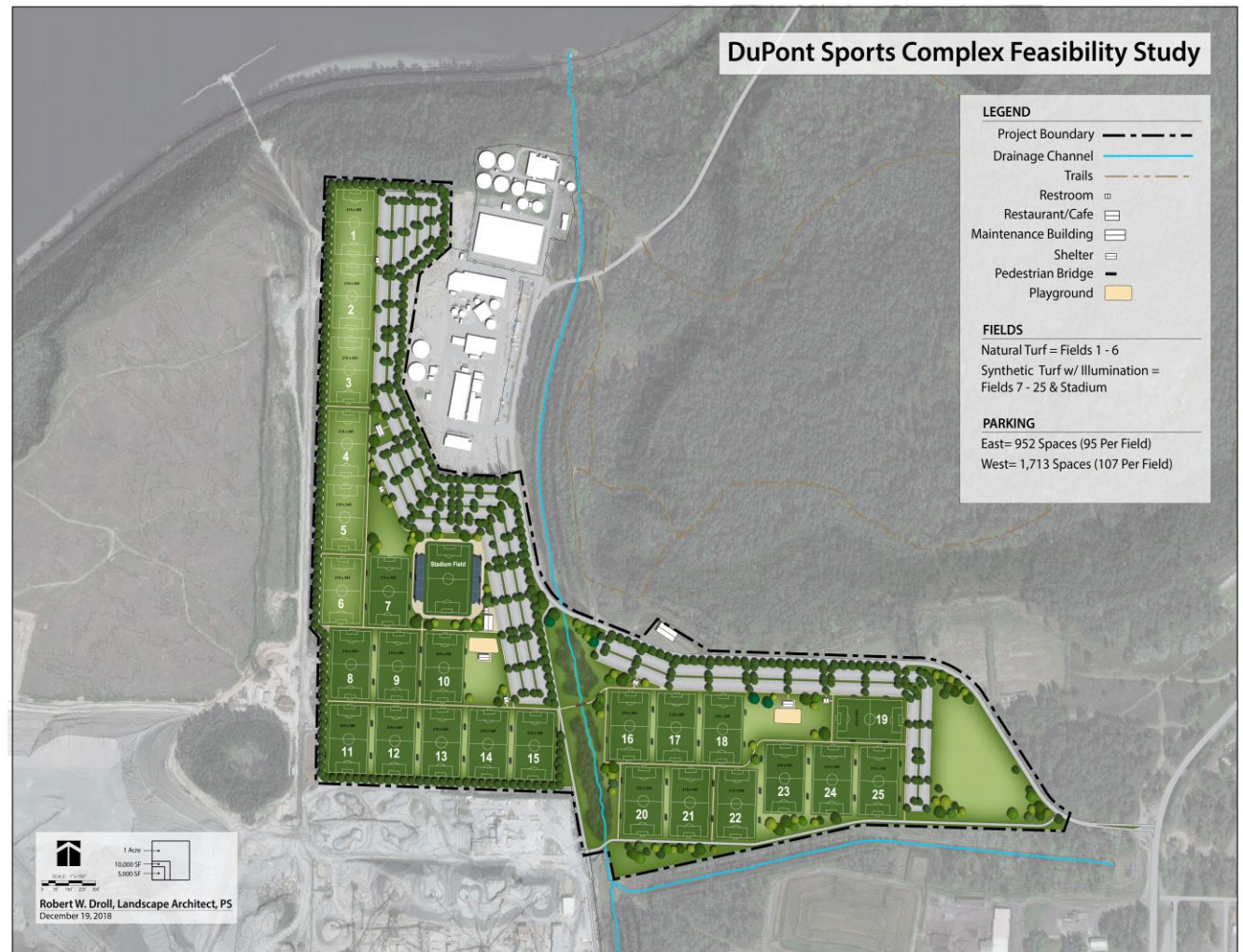


Scenario 2

DuPont Sports Complex Feasibility Study Scenario 2



Preferred Master Plan





DuPont Sports Complex

City of DuPont, WA

JBLM

Tacoma South Sound Sports Commission

Chapter 11

Governance, Funding, and Management Analysis

Potential Funding Mechanisms

With new sports and event facilities costing millions to build, significant financial investments must be made. There are many options in financing sports and event facilities that involve both public and private arrangements and investments. Funding may be separated into two distinct groups: public funding and private funding. Public funding may include, but may not be limited to taxes, municipal bonds, certificates of participation and special authority bonds. Private funding may include but may not be limited to, cash donations, contributions, naming rights, concessionaire and or restaurant rights, sponsorships, lease agreements, luxury and preferred seating, parking fees, advertising, and merchandise revenues. In order to spread the costs of building state-of-the-art facility projects, many facilities have used joint public and private funding. Often, the public funding is in the form of land contributions or luxury taxes and the private contributions are reflected within the facility itself.

Funding for public sports and event facility projects has changed dramatically in the last decade. Projects such as these are relying more on project champions and local organizations to get facilities developed than ever before. The fiscal reality is that municipalities have been forced to consider steep financial allocations to their budgets and the expectations for feasible projects are to operate without or minimal public subsidies. Communities across the country have financed sports and event facilities through traditional funding sources, while others have looked to users and visitors as the groups to fund such projects.

Potential Funding Mechanisms

The following list summarizes the funding sources used to finance several youth sports complexes across the country.

- Privately funded facilities are very rare due to construction and operating costs.
- Sponsorship/partnership via entitlements rights are becoming more common.
- Cities and counties bond to finance projects
- Infrastructure is constructed and financed by municipalities
- Receive appropriations from state or other government entity
- Several communities contribute funds for the construction of the facility
- Grants from national governing bodies
- Partnerships with school districts, colleges and universities
- Utilize new taxes or assessments: restaurant tax, sales tax, hotel tax, etc. Facilities receive a percentage of the tax to be allocated towards funding the construction and/or operations and marketing of the facility.
- Tax exempt bonds through economic development corps/entities
- Donations in the form of capital investment to land
- Assessment on users

Municipalities are now compelled to find “out of the box” ways to meet this growing demand, and the solution begins with creative funding. To be successful in raising the funds for an athletic or recreation project, municipalities and project teams should assemble a fundraising or funding group that considers public/private grants, private funding, sponsorships, public/private partnerships, and professional fundraisers to identify and secure funding.

Ownership

One of the most important decisions for a public entity that is considering the short- and long-term strategies for large public venues like an indoor sports facility is the management structure of the venue. The manner in which a municipality or county structures the type of management of the facilities is central to the success of the project. Community leaders need to implement the best ownership and management structure under which public facilities would operate to best suit the needs of the city and county, and to foster the success of the project.

Ownership of multi-use facilities throughout the United States varies depending on the type of facility, the nature of development of the property, and the needs of each community. However, large publicly-oriented facilities in general, whether arenas, multipurpose sports facilities, exhibit halls, or major convention centers, usually have one of three ownership structures. Many facilities are publicly owned, either by a municipality or a county. Some event and sports facilities are owned by quasi-public entities, such as not-for-profit corporations or authorities. The final ownership structure is totally private.

Ownership Options

Public

The most apparent advantage of public ownership is control; the governmental entity owning the facility is able to determine the management structure, the usage and the finances. However, with that control comes the responsibilities of ownership such as scheduling, day-to-day management and building maintenance, unless the owner hires an outside management company.

Ownership

Ownership Options (cont'd)

The not-for-profit corporation structure is another popular ownership type. This structure is beneficial for several reasons:

- The corporate structure mitigates the political pressures that can exist. For example, one challenge that any public facility faces is the number of groups that want to use the facility for free or at a reduced cost. If the municipality owns the facility, those pressures become real, with the elected officials dealing with groups who need or want cost reductions. While those pressures would still exist with a corporate structure, the organization can set policies that treat all groups consistently. Because the organization has to live up to its financial goals, it would truly weigh the costs of giving away space or setting below-market rental structures.
- The organization has a separate budget that requires revenue and net income to survive. The municipality may have to subsidize each year, but it still controls the allotment so the governing board has to set the budget accordingly. The board must implement a business model that has a balanced budget each year.
- The government does not have to supervise and manage all aspects of the facility. The board's responsibility is to oversee the strategic plan of the facility, operations and a balanced budget. The municipality only becomes involved if the board fails.

However, there are potential negatives to this governance structure. Among them is the perceived lack of control or recourse over what remains a public amenity. The municipality has little recourse if the not-for-profit corporation fails to achieve the operating metrics set in place for the facility. In addition, any board created with only political appointees might not have the knowledge or expertise that is needed to run the organization and manage the facility. While having business acumen, the board may not understand the inner workings of a sports, entertainment and events center.

Ownership

Ownership Options (cont'd)

Private

The third type of ownership structure is private ownership. In this structure, a for-profit corporation owns and manages the facility, with the goal of making a profit for the corporation. The most important distinction in this structure is that private facilities answer to private owners and not to any governmental body, so decisions are often profit driven rather than community driven. In addition, the substantial investments required to develop and operate these large multi-use facilities make these projects less feasible for the private sector to develop, ultimately making private ownership not as common.

Management

Facilities can be effectively run within any structure if the right, qualified management personnel are in place and the incentives and expectations are appropriate for such management. Also, it is critical that the owner (whether a municipality, authority, etc.) understands the sports, entertainment, events, and hospitality industry. An undereducated owner (regarding this industry) coupled with any management team provides an opportunity for economic and mission failure. Within any structure, safeguards and expectations must be in place to ensure everyone is operating with the same goals.

The two dominant types of management are public operation through the owner's employees, or private management that contracts with the municipal owner. As with ownership structure, pros and cons exist for both types of management of event facilities.

Private Management

- Competition drives improvements. There are several major management companies for events centers and similar facilities. By making them compete initially for a contract, the owner has a choice of vendors who will commit to excellence.
- Such companies specialize in public assembly facility management, including convention centers and sports complexes, are generally members of the trade associations and should be able to operate the facilities in a competent and creative manner.
- Management companies know how to maximize revenue and minimize expenses without hurting service. Because staff is generally non-union, under-performing employees can be terminated without a lengthy process.
- Because private management companies manage multiple facilities, they typically train managers over time through junior roles and advance them to manage facilities only when adept at the job.

Management

Private Management (cont'd)

- If an owner is unhappy with the job of management, they have several options to remedy the situation, including requesting the removal of the manager through the management company. The management company can then provide options to the owner for replacing the manager in question.
- Private management companies have relationships with national and regional event promoters, planners and other facility users.
- Generally speaking, private management companies have a more efficient and quicker procurement process for goods and services than the public contracting process.
- Private management companies charge fees above and beyond the cost of their general manager. The management fee is typically a flat amount with a bonus that can be achieved by meeting certain goals annually.
- There can be a concern of lack of control by the municipal owner over a private management company.
- General managers could potentially turn over at a higher rate as new opportunities present themselves within the company's other facilities

Public Management

- Managers working directly for the public sector owner can be successful and effective in terms of operations if they have been trained in the industry and have excelled in other markets. It is key that their contract has the same stipulations that a private management company's would in terms of management, marketing, revenue generation, expense control, customer service, etc.
- Public sector management can be influenced by political and other public sector personalities and decisions.
- When event facilities are extensions of city departments and are not stand-alone enterprises, the revenues and expenses (and subsidies) can get mixed in with other department funds and can be hard to determine.

Authority Directed Management

A third, popular way to govern public event facilities is with an authority model. This occurs when an independent authority (often appointed by elected officials) hires an independent manager or a management company to run the facility. The CVB (convention and visitor bureau) can be formed under this structure as well as and report to and receive funding from the authority. The authority receives funding from dedicated tax revenues most often. Essentially, the facility management team (private company or directly hired by the authority) would report to the authority. Also, the CVB would receive funding and report up to the authority. This would ensure cooperation between the CVB and facility stakeholders and also make sure the efforts of the total structure are aligned.

Anchor-Operated Management

The anchor-operated model combines the best elements of private management and a built-in user and tournament organizer. The model is used when there is a local or area sports organization, such as a basketball or volleyball league, that has a strong track record financially and organizationally, and can manage the facility on behalf of the city or an authority. The sports anchor may pay a lease or may have a free lease, so long as they take responsibility for all revenue and expenses at the facility and keep the city's financial operating loss risk to zero. Lease terms would need to ensure that the anchor tenant allowed for other teams and organizations to rent and use the facility. The focus should be on maximizing usage, revenue and tournament activity. This model has worked at Grand Park in Westfield, Indiana.

Process Recommendations

The following timeline is a general guideline for the City to follow as they begin to build not just a successful business plan but also ultimately, a successful sports facility.



Process Recommendations

While every new facility faces challenges and opportunities that are unique to the type of facility and community it will serve, most new facilities will boil down to three standard phases: Planning, Construction/Development and After Opening.

PLANNING: These are the tasks that need to take place prior to any renovation. Tasks could include organization development, operational planning, budget development and business modeling, design work, and programmatic decision making. DuPont has made great progress in this area.

CONSTRUCTION/DEVELOPMENT: These tasks include the myriad of tasks associated with the actual construction of the facility and include FF&E procurement, program development, and as construction nears completion tasks will expand to include program development, marketing, accountability and reporting systems, facility operation development. Many of these tasks will continue to be important after opening (hiring, marketing, activities/users, etc.).

AFTER OPENING: Tasks in this phase include all performance monitoring (financial, operational, customer services, impact to the community, etc.), continual vision and strategy evaluation and adjustment, sharing the successes (and failures) with stakeholders and the community.

Process Recommendations

In order to create the most successful facility possible, there are several key tasks that must be undertaken in the management of the facility. The county should be able to answer the following strategic questions prior to beginning the process:

- What is our goal or mission? What does success look like?
- What can we expect to do financially?
- What will our impact be?
- How will our facility meet or exceed all of these goals and expectations?

Only once these answers are clear and a firm strategic plan is created that includes everything from the facility design and operations to personnel to marketing and so on, can the City actually begin to determine the timeline for the facility and begin to execute on the bigger plan.

The job isn't done there. The City must also understand what performance measures will support or feed back into the goals and expectations of the facility and the timeline should have created a solid plan that will include specific key performance indicators and measurements.

Chapter 12

Demand and Financial Projections

Demand and Financial Projections

The adjacent table shows the number of annual events projected for the facility.

As shown, there are projected to be approximately 219 events in the stabilized year, including approximately 35 tournaments. Each season, practice, and league event is considered one event occasion. A 12-week season would account for 12 events in the adjacent table.

Projected Number of Events - DuPont Sports Complex										
	Year 1	Year 2	Year 3	Year 4	Year 5	Year 6	Year 7	Year 8	Year 9	Year 10
Soccer										
Competitive New Tournament	11	13	14	16	16	16	16	16	16	16
Local New Tournament	2	2	3	3	3	3	3	3	3	3
Youth Soccer Leagues (Weeks - Spring & Fall)	24	24	24	24	24	24	24	24	24	24
Camps/Programs	3	4	4	4	4	4	4	4	4	4
Practices (Weeks)	28	28	28	28	28	28	28	28	28	28
Adult Soccer Leagues (Weeks-Spring & Fall)	20	20	20	20	20	20	20	20	20	20
High School Regional/State Soccer Events*	2	2	3	3	3	4	4	4	4	4
Total	90	93	96	98	98	99	99	99	99	99
Lacrosse										
Competitive New Tournament	2	2	3	3	4	4	4	4	4	4
Local New Tournament	1	1	1	2	2	2	2	2	2	2
Youth Lacrosse Leagues (Weeks - Spring)	12	12	12	12	12	12	12	12	12	12
Camps/Programs	1	1	2	2	2	2	2	2	2	2
Practices (Weeks)	24	24	24	24	24	24	24	24	24	24
High School Regional/State Lacrosse Events*	1	1	2	2	2	2	2	2	2	2
Total	41	41	44	45	46	46	46	46	46	46
Rugby/Football										
Competitive New Tournament	1	1	1	2	2	2	2	2	2	2
Local New Tournament	0	0	0	0	0	1	1	1	1	1
Camps/Programs	1	1	1	1	1	2	2	2	2	2
Practices (Weeks)	24	24	24	24	24	24	24	24	24	24
Adult Rugby League (Weeks)	10	10	10	10	10	10	10	10	10	10
High School Regional/State Events*	1	1	1	1	1	1	1	1	1	1
Total	37	37	37	38	38	40	40	40	40	40
Other										
Area Schools	24	26	28	28	28	28	28	28	28	28
JBLM Events	1	2	2	2	2	2	2	2	2	2
Other Non-Sport Events	2	2	3	3	4	4	5	5	5	5
Total	27	30	33	33	34	34	35	35	35	35
Total Events	195	201	210	214	216	219	220	220	220	220
<i>*Tournament Events</i>	21	23	28	32	33	35	35	35	35	35

Source: Various Sports Organizations, Hunden Strategic Partners

Demand and Financial Projections

The adjacent table shows just the tournament events expected to be held at the sports complex.

The number of tournaments in year one is expected to be 24. The number of tournaments is estimated to increase to 35 by stabilization. This includes 16 new major soccer events.

Projected Number of Tournaments - DuPont Sports Complex										
	Year 1	Year 2	Year 3	Year 4	Year 5	Year 6	Year 7	Year 8	Year 9	Year 10
Soccer										
Competitive New Tournament	11	13	14	16	16	16	16	16	16	16
Local New Tournament	2	2	3	3	3	3	3	3	3	3
High School Regional/State Soccer Events*	2	2	3	3	3	4	4	4	4	4
Total	18	17	20	22	22	23	23	23	23	23
Lacrosse										
Competitive New Tournament	2	2	3	3	4	4	4	4	4	4
Local New Tournament	1	1	1	2	2	2	2	2	2	2
High School Regional/State Lacrosse Events*	1	1	2	2	2	2	2	2	2	2
Total	4	4	6	7	8	8	8	8	8	8
Rugby/Football										
Competitive New Tournament	1	1	1	2	2	2	2	2	2	2
Local New Tournament	0	0	0	0	0	1	1	1	1	1
High School Regional/State Events*	1	1	1	1	1	1	1	1	1	1
Total	2	2	2	3	3	4	4	4	4	4
Total Events	24	23	28	32	33	35	35	35	35	35
Source: Various Sports Organizations, Hunden Strategic Partners										

Demand and Financial Projections

Based on the number of average days per event type, the following number of event-days was projected.

As shown, DuPont can expect approximately 460 event-days per year by stabilization. Tournaments will account for approximately 71 event days by stabilization.

Projected Event Days - DuPont Sports Complex											
	Days per Event	Year 1	Year 2	Year 3	Year 4	Year 5	Year 6	Year 7	Year 8	Year 9	Year 10
Soccer											
Competitive New Tournament	2.5	28	33	35	40	40	40	40	40	40	40
Local New Tournament	2	4	4	6	6	6	6	6	6	6	6
Youth Soccer Leagues	3	72	72	72	72	72	72	72	72	72	72
Camps/Programs	4	12	16	16	16	16	16	16	16	16	16
Practices	3	84	84	84	84	84	84	84	84	84	84
Adult Soccer Leagues	2	40	40	40	40	40	40	40	40	40	40
High School Regional/State Soccer Events*	1	2	2	3	3	3	4	4	4	4	4
Total		242	251	256	261	261	262	262	262	262	262
Lacrosse											
Competitive New Tournament	2	4	4	6	6	8	8	8	8	8	8
Competitive New Tournament	2	4	4	6	6	8	8	8	8	8	8
Local New Tournament	2	2	2	2	4	4	4	4	4	4	4
Youth Lacrosse Leagues	1	12	12	12	12	12	12	12	12	12	12
Camps/Programs	4	4	4	8	8	8	8	8	8	8	8
Practices	2	48	48	48	48	48	48	48	48	48	48
High School Regional/State Lacrosse Events*	1	1	1	2	2	2	2	2	2	2	2
Total		71	71	78	80	82	82	82	82	82	82
Rugby/Football											
Competitive New Tournament	2	2	2	2	4	4	4	4	4	4	4
Local New Tournament	2	0	0	0	0	0	2	2	2	2	2
Camps/Programs	4	4	4	4	4	4	8	8	8	8	8
Practices	2	48	48	48	48	48	48	48	48	48	48
Adult Rugby League	2	20	20	20	20	20	20	20	20	20	20
High School Regional/State Events*	1	1	1	1	1	1	1	1	1	1	1
Total		74	74	74	76	76	82	82	82	82	82
Other											
Area Schools	1	24	26	28	28	28	28	28	28	28	28
JBLM Events	1	1	2	2	2	2	2	2	2	2	2
Other Non-Sport Events	1	2	2	3	3	4	4	5	5	5	5
Total		27	30	33	33	34	34	35	35	35	35
Total Event Days		414	426	441	450	453	460	461	461	461	461
<i>*Tournament Event Days</i>		44	49	57	66	68	71	71	71	71	71

Source: Various Sports Organizations, Hunden Strategic Partners

Demand and Financial Projections

The adjacent table shows the number of expected teams, players and coaches using the DuPont Sports Complex annually.

Based on the assumptions, it is projected that the facility will attract 82,000 participants per year by the stabilized year. A portion of those, approximately 60,000, would be teams coming for tournaments. For local teams, each player playing each league game counts as one participant (so one player playing spring soccer would be counted twelve times if there are twelve weeks in the season).

Projected Teams & Participation - DuPont Sports Complex														
	Teams	Youth/ Team	Coaches/ Team	Total	Year 1	Year 2	Year 3	Year 4	Year 5	Year 6	Year 7	Year 8	Year 9	Year 10
Soccer														
Competitive New Tournament	170	14.5	2.5	17	31,790	38,697	42,924	50,528	52,044	53,605	55,213	56,869	58,575	60,333
Local New Tournament	40	13.5	2	15.5	1,240	1,277	1,973	2,032	2,093	2,156	2,221	2,288	2,356	2,427
Youth Soccer Leagues	16	14.5	2	16.5	6,336	6,336	6,336	6,336	6,336	6,336	6,336	6,336	6,336	6,336
Camps/Programs	1	125	9	134	402	541	547	552	558	563	569	575	580	586
Practices	10	14.5	2	16.5	4,620	4,620	4,620	4,620	4,620	4,620	4,620	4,620	4,620	4,620
Adult Soccer Leagues	6	15.5	1	16.5	1,980	1,980	1,980	1,980	1,980	1,980	1,980	1,980	1,980	1,980
High School Regional/State Soccer Events*	4	18	2.5	20.5	164	164	246	246	246	328	328	328	328	328
Total					46,532	53,616	58,626	66,294	67,877	69,588	71,267	72,996	74,776	76,610
Lacrosse														
Competitive New Tournament	36	15.5	2.5	18	1,296	1,335	2,062	2,124	2,917	3,005	3,095	3,188	3,283	3,382
Local New Tournament	8	15.5	2	17.5	140	143	146	297	303	309	315	322	328	335
Youth Lacross Leagues	6	14.5	2	16.5	1,188	1,188	1,188	1,188	1,188	1,188	1,188	1,188	1,188	1,188
Camps/Programs	1	75	5	80	80	81	163	165	166	168	170	172	173	175
Practices	4	14.5	2	16.5	1,584	1,584	1,584	1,584	1,584	1,584	1,584	1,584	1,584	1,584
High School Regional/State Lacrosse Events*	4	18.5	2.5	21	84	84	168	168	168	168	168	168	168	168
Total					4,372	4,414	5,311	5,526	6,327	6,422	6,520	6,621	6,725	6,832
Rugby/Football														
Competitive New Tournament	12	15.5	2.5	18	216	222	229	472	486	501	516	531	547	564
Camps/Programs	1	50	5	55	55	56	56	57	57	116	117	118	119	120
Practices	2	14.5	2	16.5	792	792	792	792	792	792	792	792	792	792
Adult Rugby Leagues	2	14.5	2	16.5	330	330	330	330	330	330	330	330	330	330
High School Regional/State Events*	2	14.5	2.5	17	34	34	34	34	34	34	34	34	34	34
Total					1,427	1,434	1,441	1,685	1,699	1,848	1,865	1,883	1,901	1,920
Other														
Area Schools	4	16	3	19	1,824	1,976	2,128	2,128	2,128	2,128	2,128	2,128	2,128	2,128
JBLM Events	1	500	0	500	500	1,000	1,000	1,000	1,000	1,000	1,000	1,000	1,000	1,000
Other Non-Sport Events	1	300	0	300	600	600	900	900	1,200	1,200	1,500	1,500	1,500	1,500
Total					2,924	3,576	4,028	4,028	4,328	4,328	4,628	4,628	4,628	4,628
Total Participation					55,255	63,040	69,407	77,533	80,231	82,186	84,280	86,128	88,030	89,989
*Tournament Participation					34,964	41,956	47,782	55,902	58,292	60,181	61,967	63,805	65,699	67,650
Source: Various Sports Organizations, Hunden Strategic Partners														

Demand and Financial Projections

The next table shows the expected number of spectators (family and friends) coming to the DuPont Sports Complex annually for various events.

Based on the assumptions (1.6 to 2.2 spectators per athlete), HSP projects more than 160,000 family and friends will attend events annually by the tenth year. Of these, more than 90 percent are due to tournaments, suggesting a major tourism impact.

Projection of Spectators - DuPont Sports Complex										
	Year 1	Year 2	Year 3	Year 4	Year 5	Year 6	Year 7	Year 8	Year 9	Year 10
Soccer										
Competitive Existing Tournament	0	0	0	0	0	0	0	0	0	0
Competitive New Tournament	69,938	85,134	94,433	111,161	114,496	117,931	121,469	125,113	128,866	132,732
Local New Tournament	2,728	2,810	4,341	4,471	4,606	4,744	4,886	5,033	5,184	5,339
Youth Soccer Leagues	8,870	8,870	8,870	8,870	8,870	8,870	8,870	8,870	8,870	8,870
Camps/Programs	40	54	55	55	56	56	57	57	58	59
Practices	462	462	462	462	462	462	462	462	462	462
Adult Soccer Leagues	594	594	594	594	594	594	594	594	594	594
High School Regional/State Soccer Events*	213	213	320	320	320	426	426	426	426	426
Total	82,846	98,137	109,075	125,934	129,403	133,084	136,764	140,556	144,460	148,483
Lacrosse										
Competitive New Tournament	2,851	2,937	4,537	4,673	6,418	6,611	6,809	7,013	7,224	7,440
Local New Tournament	308	314	320	654	667	680	694	708	722	736
Youth Lacrosse Leagues	1,663	1,663	1,663	1,663	1,663	1,663	1,663	1,663	1,663	1,663
Camps/Programs	8	8	16	16	17	17	17	17	17	17
Practices	158	158	158	158	158	158	158	158	158	158
High School Regional/State Lacrosse Events*	109	109	218	218	218	218	218	218	218	218
Total	5,098	5,190	6,914	7,384	9,142	9,348	9,560	9,778	10,003	10,234
Rugby/Football										
Competitive New Tournament	302	311	321	661	681	701	722	744	766	789
Local New Tournament	0	0	0	0	0	106	107	109	110	112
Camps/Programs	6	6	6	6	6	12	12	12	12	12
Practices	79	79	79	79	79	79	79	79	79	79
Adult Rugby Leagues	99	99	99	99	99	99	99	99	99	99
High School Regional/State Events*	44	44	44	44	44	44	44	44	44	44
Total	530	539	549	889	909	1,041	1,063	1,087	1,111	1,136
Other										
Area Schools	547	593	638	638	638	638	638	638	638	638
Other Non-Sport Events	600	600	900	900	1,200	1,200	1,500	1,500	1,500	1,500
Total	1,147	1,193	1,538	1,538	1,838	1,838	2,138	2,138	2,138	2,138
Total Spectators	89,621	105,059	118,076	135,745	141,292	145,310	149,526	153,559	157,712	161,991
*Tournament Spectators										
	76,494	91,872	104,535	122,203	127,449	131,461	135,376	139,408	143,561	147,838
Source: Various Sports Organizations, Hunden Strategic Partners										

Demand and Financial Projections

The next table shows the total number of visitors (participants and spectators) expected at the DuPont Sports Complex.

Total attendance is projected to increase from more than 144,000 to more than 227,000 by stabilization, depending on the number of tournaments held. More than 215,000 total attendees are projected from tournaments by the tenth year.

Projected Total Visitors (Players, Coaches, Families) - DuPont Sports Complex										
	Year 1	Year 2	Year 3	Year 4	Year 5	Year 6	Year 7	Year 8	Year 9	Year 10
Soccer										
Competitive New Tournament	101,728	123,831	137,357	161,689	166,539	171,535	176,682	181,982	187,441	193,065
Local New Tournament	3,968	4,087	6,314	6,504	6,699	6,900	7,107	7,320	7,540	7,766
Youth Soccer Leagues	15,206	15,206	15,206	15,206	15,206	15,206	15,206	15,206	15,206	15,206
Camps/Programs	442	595	601	607	614	620	626	632	638	645
Practices	5,082	5,082	5,082	5,082	5,082	5,082	5,082	5,082	5,082	5,082
Adult Soccer Leagues	2,574	2,574	2,574	2,574	2,574	2,574	2,574	2,574	2,574	2,574
High School Regional/State Soccer Events*	377	377	566	566	566	754	754	754	754	754
Total	129,378	151,753	167,701	192,228	197,280	202,672	208,031	213,551	219,237	225,092
Lacrosse										
Competitive Existing Tournament	0	0	0	0	0	0	0	0	0	0
Competitive New Tournament	4,147	4,272	6,600	6,798	9,335	9,615	9,904	10,201	10,507	10,822
Local New Tournament	448	457	466	951	970	989	1,009	1,029	1,050	1,071
Youth Lacrosse Leagues	2,851	2,851	2,851	2,851	2,851	2,851	2,851	2,851	2,851	2,851
Camps/Programs	88	89	180	181	183	185	187	189	191	192
Practices	1,742	1,742	1,742	1,742	1,742	1,742	1,742	1,742	1,742	1,742
High School Regional/State Lacrosse Event	193	193	386	386	386	386	386	386	386	386
Total	9,470	9,604	12,225	12,910	15,468	15,770	16,080	16,399	16,727	17,066
Rugby										
Competitive Existing Tournament	0	0	0	0	0	0	0	0	0	0
Competitive New Tournament	518	534	550	1,133	1,167	1,202	1,238	1,275	1,313	1,353
Local New Tournament	0	0	0	0	0	181	184	186	189	192
Youth Leagues	0	0	0	0	0	0	0	0	0	0
Camps/Programs	61	61	62	62	63	127	128	130	131	132
Practices	871	871	871	871	871	871	871	871	871	871
Adult Rugby Leagues	429	429	429	429	429	429	429	429	429	429
High School Regional/State Events*	78	78	78	78	78	78	78	78	78	78
Total	1,957	1,973	1,990	2,574	2,608	2,888	2,929	2,970	3,012	3,056
Other										
Area Schools	2,371	2,569	2,766	2,766	2,766	2,766	2,766	2,766	2,766	2,766
JBLM Events	500	1,000	1,000	1,000	1,000	1,000	1,000	1,000	1,000	1,000
Other Non-Sport Events	1,200	1,200	1,800	1,800	2,400	2,400	3,000	3,000	3,000	3,000
Total	4,071	4,769	5,566	5,566	6,166	6,166	6,766	6,766	6,766	6,766
Total Visitation	144,876	168,099	187,483	213,278	221,523	227,497	233,806	239,686	245,742	251,980
*Total Tournament Visitation	111,458	133,829	152,317	178,104	185,741	191,642	197,342	203,213	209,260	215,488
Source: Various Sports Organizations, Hunden Strategic Partners										

Demand and Financial Projections

The next table is a consolidated estimate of revenue and expense for the DuPont Sports Complex.

The model assumes events will pay daily, hourly or per-game fees to use the facility, based on fees charged at comparable and regional facilities. HSP projects modest losses during the facility's first four years of operations before breaking even in Year 5.

DuPont Sports Complex - Full Build Out Scenario Financial Projections (thousands of constant dollars)										
Item	Fiscal Year									
	Year 1	Year 2	Year 3	Year 4	Year 5	Year 6	Year 7	Year 8	Year 9	Year 10
Operating Revenue										
Rental Fees	\$569	\$634	\$694	\$766	\$795	\$825	\$851	\$876	\$903	\$930
Net Concessions	\$93	\$115	\$134	\$161	\$172	\$183	\$194	\$206	\$218	\$231
Misc.	\$4	\$5	\$6	\$8	\$8	\$9	\$9	\$10	\$11	\$11
Parking Revenue	\$235	\$283	\$320	\$375	\$391	\$403	\$415	\$427	\$440	\$453
Advertising and Sponsorship	\$48	\$67	\$103	\$106	\$109	\$113	\$116	\$119	\$123	\$127
Naming Rights	\$75	\$77	\$80	\$82	\$84	\$87	\$90	\$92	\$95	\$98
Total Revenue	\$1,024	\$1,182	\$1,337	\$1,497	\$1,560	\$1,619	\$1,675	\$1,731	\$1,789	\$1,850
Operating Expense										
Fixed										
Salary - Permanent Staff	\$295	\$304	\$313	\$322	\$332	\$342	\$352	\$363	\$374	\$385
Salary - Part-Time/Seasonal Staff	\$100	\$103	\$106	\$109	\$113	\$116	\$119	\$123	\$127	\$130
Benefits - Permanent Staff	\$97	\$100	\$103	\$106	\$110	\$113	\$116	\$120	\$123	\$127
General and Administrative/Other	\$110	\$113	\$117	\$120	\$124	\$128	\$131	\$135	\$139	\$144
Marketing Advertising	\$35	\$36	\$37	\$38	\$39	\$41	\$42	\$43	\$44	\$46
Utilities	\$350	\$361	\$371	\$382	\$394	\$406	\$418	\$430	\$443	\$457
Facility Maintenance	\$284	\$293	\$301	\$310	\$320	\$329	\$339	\$349	\$360	\$371
Security	\$25	\$26	\$27	\$27	\$28	\$29	\$30	\$31	\$32	\$33
Insurance	\$45	\$46	\$48	\$49	\$51	\$52	\$54	\$55	\$57	\$59
Operating Expenses	\$1,341	\$1,382	\$1,423	\$1,466	\$1,510	\$1,555	\$1,602	\$1,650	\$1,699	\$1,750
Facility Reserve	\$31	\$35	\$40	\$45	\$47	\$49	\$50	\$52	\$54	\$55
Net Operating Income (Deficit)	(\$348)	(\$235)	(\$127)	(\$14)	\$3	\$15	\$23	\$29	\$37	\$44

Source: Hunden Strategic Partners

Assumptions

Rental fees are projected to be the largest revenue source, stabilizing at approximately \$900,000. Parking revenue, net concessions, and advertising/sponsorships make up other significant revenue sources. The proforma assumes a parking fee of \$5 is charged to spectators visiting the facility for tournaments and other high profile events. Parking revenue will be a critical element to offset incremental expenses to attract elite staff and operational expenses associated to collecting the gate fee. Parking revenue is expected to generate as much as \$235,000 in the first year and stabilize at more than \$400,000.

For concessions and novelties, the facility shares a percentage of gross sales. Many facilities do not allow outside food in order to drive onsite food and beverage sales and minimize post-event cleaning and maintenance. Advertising and sponsorship opportunities should be available, given the size and programming potential for the complex. The assumptions for these figures were based on similar facilities. Given the large potential revenue amounts associated with advertising, sponsorship and potential naming rights, these are key factors to a successful fiscally sound operation.

Assumptions

The following table shows the five full-time employees projected for the DuPont Sports Complex.

The General Manager, Business Development will be the highest compensated staff member, followed by the Facility Operations Manager and Event Management Manager. Full-time staff is projected to cost \$295,000 plus benefit costs of approximately 33 percent of salaries.

Salary Assumptions

Position	Total Compensation
General Manger, Business Development	\$90,000
Manager, Facility Operations	\$65,000
Asst. Manager, Facility Operations	\$45,000
Manager, Event Management	\$55,000
Asst. Manager Events and Marketing	\$40,000
	\$295,000

Source: Hunden Strategic Partners, Jefferson Parish

Assumptions

The following table shows the parking revenue generated from spectators attending tournaments and other high profile events.

Net parking revenue is expected to increase from \$235,000 in year one to nearly \$450,000 in year ten. The parking fee is assumed to be \$5 and charged to each car that enters the facility for tournament and other high-profile events. HSP assumed three spectators per car. The parking related expenses is assumed to be 20 percent of expected gross gate revenues. Similar to sponsorships, parking revenue is still a relatively new revenue source that facilities are beginning to explore as a way to offset operating costs and assist with capital improvements. Other communities have taken the opposite approach by making policy decisions that community assets such as sports complexes will not levy parking fees. This will be a decision for community leadership to decide.

Projected Parking Revenue - DuPont Sports Complex										
	Year 1	Year 2	Year 3	Year 4	Year 5	Year 6	Year 7	Year 8	Year 9	Year 10
Gate Fee	\$5.00	\$5.00	\$5.00	\$5.00	\$5.00	\$5.00	\$5.00	\$5.00	\$5.00	\$5.00
Gate Expenses	20%	20%	20%	20%	20%	20%	20%	20%	20%	20%
Soccer										
Competitive New Tournament										
Total Attendee Days	174,845	212,834	236,082	277,902	286,239	294,827	303,671	312,782	322,165	331,830
Gross Revenue	\$273,195	\$332,553	\$368,878	\$434,222	\$447,249	\$460,667	\$474,487	\$488,721	\$503,383	\$518,484
Local New Tournament										
Total Attendee Days	5,456	5,620	8,682	8,943	9,211	9,487	9,772	10,065	10,367	10,678
Gross Revenue	\$9,093	\$9,366	\$14,471	\$14,905	\$15,352	\$15,812	\$16,287	\$16,775	\$17,279	\$17,797
Soccer Total	\$282,289	\$341,919	\$383,349	\$449,127	\$462,601	\$476,479	\$490,773	\$505,497	\$520,662	\$536,281
Lacrosse										
Competitive New Tournament										
Total Attendee Days	5,702	5,873	9,075	9,347	12,836	13,221	13,618	14,026	14,447	14,881
Gross Revenue	\$9,504	\$9,789	\$15,124	\$15,578	\$21,394	\$22,035	\$22,697	\$23,377	\$24,079	\$24,801
Local New Tournament										
Total Attendee Days	616	628	641	1,307	1,334	1,360	1,387	1,415	1,443	1,472
Gross Revenue	\$1,027	\$1,047	\$1,068	\$2,179	\$2,223	\$2,267	\$2,312	\$2,359	\$2,406	\$2,454
Softball Total	\$10,531	\$10,836	\$16,192	\$17,757	\$23,616	\$24,303	\$25,009	\$25,736	\$26,485	\$27,255
Rugby										
Local New Tournament										
Total Attendee Days	0	0	0	0	0	211	214	218	221	224
Gross Revenue	\$0	\$0	\$0	\$0	\$0	\$352	\$357	\$363	\$368	\$374
Rugby Total	\$1,008	\$1,038	\$1,069	\$2,203	\$2,269	\$2,689	\$2,764	\$2,842	\$2,922	\$3,004
Expected Gross Gate Revenue	\$ 293,827	\$ 353,794	\$ 400,611	\$ 469,087	\$ 488,486	\$ 503,471	\$ 518,547	\$ 534,075	\$ 550,068	\$ 566,540
Parking Expense	\$ 58,765	\$ 70,759	\$ 80,122	\$ 93,817	\$ 97,697	\$ 100,694	\$ 103,709	\$ 106,815	\$ 110,014	\$ 113,308
Net Parking Revenue to Facility	\$ 235,062	\$ 283,035	\$ 320,489	\$ 375,270	\$ 390,789	\$ 402,776	\$ 414,837	\$ 427,260	\$ 440,054	\$ 453,232

Source: Hunden Strategic Partners

Assumptions

The following table shows the rental assumptions.

As shown, there are hourly, daily and per game fees. The rental revenue is based on the facility rental and concession stand rental fees. The projected fee schedule is based on current comparable facilities' rental fees. Additionally, it would be expected that organizations or entities such as the area school district or other potential long-term tenants that partner with the facility are likely to receive discounted rental rates or pay a monthly fixed fee for their use. However, no agreements were considered in the pro forma at this time.

DuPont Sports Complex Fee Schedule		
Event	Facility Rental*	Rental Period
Soccer		
Competitive Existing Tournament	\$400	Field per day
Competitive New Tournament	\$400	Field per day
Local New Tournament	\$400	Field per day
Youth Lacross Leagues	\$45	Per game
Camps/Programs	\$50	Per hour
Practices	\$50	Per hour
Adult Soccer Leagues	\$50	Per hour
High School Regional/State Soccer Events*	\$0	Per hour
Lacrosse		
Competitive Existing Tournament	\$400	Field per day
Competitive New Tournament	\$400	Field per day
Local New Tournament	\$400	Field per day
Youth Lacrosse Leagues	\$45	Per game
Camps/Programs	\$50	Per hour
Practices	\$50	Per hour
High School Regional/State Lacrosse Events*	\$0	Per hour
Rugby/Football		
Competitive Existing Tournament	\$400	Field per day
Competitive New Tournament	\$400	Field per day
Local New Tournament	\$400	Field per day
Youth Leagues	\$45	Per game
Camps/Programs	\$50	Per hour
Practices	\$50	Per hour
Adult Rugby League	\$50	Per hour
High School Regional/State Events*	\$0	Per hour
Other		
Area Schools	\$40	Per hour
JBLM Events	\$0	Per day
Other Non-Sport Events	\$750	Per day
Source: Fayette County Parks & Recreation Department, Various Organizations, Hunden Strategic Partners		

Assumptions

The next table shows the rent detail for the DuPont Sports Complex.

In total, there are many factors that contribute to revenue and expense. In order for the DuPont Sports Complex to minimize its operating deficit and improve its cost recovery as an enterprise, an entrepreneurial and businesslike mindset will be necessary to promote and fill the complex with users on a year-round basis.

Projected Gross Rental Revenue - DuPont Sports Complex										
	Year 1	Year 2	Year 3	Year 4	Year 5	Year 6	Year 7	Year 8	Year 9	Year 10
Soccer										
Competitive New Tournament	\$221,375	\$269,474	\$298,909	\$351,858	\$362,414	\$373,286	\$384,485	\$396,019	\$407,900	\$420,137
Local New Tournament	\$12,900	\$13,287	\$20,528	\$21,144	\$21,779	\$22,432	\$23,105	\$23,798	\$24,512	\$25,247
Youth Soccer Leagues	\$19,080	\$19,652	\$20,242	\$20,849	\$21,475	\$22,119	\$22,783	\$23,466	\$24,170	\$24,895
Camps/Programs	\$14,700	\$20,188	\$20,794	\$21,417	\$22,060	\$22,722	\$23,403	\$24,106	\$24,829	\$25,574
Practices	\$126,000	\$129,780	\$133,673	\$137,684	\$141,814	\$146,069	\$150,451	\$154,964	\$159,613	\$164,401
Adult Soccer Leagues	\$33,000	\$33,990	\$35,010	\$36,060	\$37,142	\$38,256	\$39,404	\$40,586	\$41,803	\$43,058
High School Regional/State Soccer Events	\$50	\$52	\$80	\$82	\$84	\$116	\$119	\$123	\$127	\$130
Total	\$427,105	\$486,423	\$529,235	\$589,095	\$606,767	\$624,999	\$643,749	\$663,062	\$682,954	\$703,442
Lacrosse										
Competitive New Tournament	\$9,800	\$10,094	\$15,595	\$16,063	\$22,060	\$22,722	\$23,403	\$24,106	\$24,829	\$25,574
Local New Tournament	\$3,250	\$3,348	\$3,448	\$7,103	\$7,316	\$7,535	\$7,761	\$7,994	\$8,234	\$8,481
Youth Lacrosse Leagues	\$3,540	\$3,646	\$3,756	\$3,868	\$3,984	\$4,104	\$4,227	\$4,354	\$4,484	\$4,619
Camps/Programs	\$4,900	\$5,047	\$10,397	\$10,709	\$11,030	\$11,361	\$11,702	\$12,053	\$12,414	\$12,787
Practices	\$48,000	\$49,440	\$50,923	\$52,451	\$54,024	\$55,645	\$57,315	\$59,034	\$60,805	\$62,629
High School Regional/State Lacrosse Even	\$25	\$26	\$53	\$55	\$56	\$58	\$60	\$61	\$63	\$65
Total	\$69,515	\$71,600	\$84,172	\$90,248	\$98,471	\$101,425	\$104,468	\$107,602	\$110,830	\$114,155
Rugby										
Competitive New Tournament	\$3,300	\$3,399	\$3,501	\$7,212	\$7,428	\$7,651	\$7,881	\$8,117	\$8,361	\$8,612
Local New Tournament	\$0	\$0	\$0	\$0	\$0	\$1,913	\$1,970	\$2,029	\$2,090	\$2,153
Camps/Programs	\$3,700	\$3,811	\$3,925	\$4,043	\$4,164	\$8,579	\$8,836	\$9,101	\$9,374	\$9,655
Practices	\$24,000	\$24,720	\$25,462	\$26,225	\$27,012	\$27,823	\$28,657	\$29,517	\$30,402	\$31,315
Adult Rugby League	\$29,300	\$30,179	\$31,084	\$32,017	\$32,977	\$33,967	\$34,986	\$36,035	\$37,116	\$38,230
High School Regional/State Events*	\$25	\$26	\$27	\$27	\$28	\$29	\$30	\$31	\$32	\$33
Total	\$60,300	\$62,109	\$63,972	\$69,497	\$71,582	\$79,932	\$82,330	\$84,800	\$87,344	\$89,964
Other										
Area Schools	\$9,600	\$10,712	\$11,882	\$12,239	\$12,606	\$12,984	\$13,373	\$13,775	\$14,188	\$14,613
JBLM Events	\$0	\$0	\$0	\$0	\$0	\$0	\$0	\$0	\$0	\$0
Other Non-Sport Events	\$2,850	\$3,090	\$4,138	\$4,262	\$5,290	\$5,449	\$6,567	\$6,764	\$6,967	\$7,176
Total	\$12,450	\$13,802	\$16,020	\$16,500	\$17,896	\$18,432	\$19,941	\$20,539	\$21,155	\$21,790
Total Rental Revenue	\$569,370	\$633,934	\$693,399	\$765,341	\$794,716	\$824,789	\$850,488	\$876,002	\$902,282	\$929,351

Source: Various Sports Organizations, Hunden Strategic Partners

Chapter 13

Economic, Fiscal, and Employment Impact Analysis

Room Nights

While many facilities that draw tourists and visitors only break even or even lose money from operations (such as convention centers, sports facilities, etc.), the impact of the visitors on the community can be significant. The impact from spending on hotels, restaurants, stores and gas stations can generate hundreds of jobs and large tax benefits from local use taxes. The basis for the impacts will be the net new room nights in the community due to the Project as well as the incremental spending associated with existing visitors who spend more because of their visit to the Project. The net new visitors may be staying in other hotels as well, like sports teams that now are coming to the area because tournaments can now happen that otherwise would not have occurred.

The adjacent table shows the number of room nights generated from each user group. As shown, there are projected to be more than 50,000 room nights generated by the stabilized year, nearly all of which will be generated by soccer tournaments.

Projected Room Nights Generated - DuPont Sports Complex													
	% Overnight	People/ Room	Nights per Event	Year 1	Year 2	Year 3	Year 4	Year 5	Year 6	Year 7	Year 8	Year 9	Year 10
Soccer													
Competitive New Tournament	40%	2.9	2	28,063	34,160	37,892	44,604	45,942	47,320	48,740	50,202	51,708	53,259
Local New Tournament	25%	2.3	2	863	888	1,373	1,414	1,456	1,500	1,545	1,591	1,639	1,688
High School Regional/State Socce	10%	2.9	1	13	13	20	20	20	26	26	26	26	26
Total				28,939	35,062	39,284	46,037	47,418	48,846	50,311	51,819	53,373	54,973
Lacrosse													
Competitive New Tournament	40%	2.9	2	1,144	1,178	1,821	1,875	2,575	2,653	2,732	2,814	2,899	2,985
Local New Tournament	25%	2.3	2	97	99	101	207	211	215	219	224	228	233
High School Regional/State Lacros	10%	2.9	1	7	7	13	13	13	13	13	13	13	13
Total				1,248	1,284	1,935	2,095	2,799	2,881	2,965	3,051	3,140	3,232
Rugby/Football													
Competitive New Tournament	40%	2.9	2	143	147	152	313	322	332	342	352	362	373
High School Regional/State Events	10%	2.9	1	3	3	3	3	3	3	3	3	3	3
Total				146	150	154	315	325	374	384	395	406	418
Other													
JBLM Events	5%	2.6	1	10	19	19	19	19	19	19	19	19	19
Other Non-Sport Events	20%	2.9	1	83	83	124	124	166	166	207	207	207	207
Total				92	102	143	143	185	185	226	226	226	226
				30,425	36,598	41,517	48,591	50,727	52,285	53,886	55,492	57,145	58,849

Source: Various Sports Organizations, Hunden Strategic Partners

Day Trips

The next table shows the number of day trips generated by the DuPont Sports Complex.

Approximately 403,000 visitor days are expected by the tenth year.

Projected Day Trips Generated - DuPont Sports Complex												
	% Day Trip	Days per Event	Year 1	Year 2	Year 3	Year 4	Year 5	Year 6	Year 7	Year 8	Year 9	Year 10
Soccer												
Competitive New Tournament	60%	2.5	152,592	185,746	206,035	242,533	249,809	257,303	265,022	272,973	281,162	289,597
Local New Tournament	75%	2	5,952	6,131	9,472	9,756	10,049	10,350	10,660	10,980	11,310	11,649
Youth Soccer Leagues (Weeks - S	100%	3	45,619	45,619	45,619	45,619	45,619	45,619	45,619	45,619	45,619	45,619
Camps/Programs	100%	4	1,769	2,382	2,406	2,430	2,454	2,479	2,503	2,529	2,554	2,579
Practices (Weeks)	100%	3	15,246	15,246	15,246	15,246	15,246	15,246	15,246	15,246	15,246	15,246
Adult Soccer Leagues (Weeks-Spr	100%	2	5,148	5,148	5,148	5,148	5,148	5,148	5,148	5,148	5,148	5,148
High School Regional/State Soccer	90%	1	339	339	509	509	509	679	679	679	679	679
Total			226,665	260,611	284,435	321,241	328,834	336,824	344,878	353,174	361,718	370,518
Lacrosse												
Competitive New Tournament	60%	2	4,977	5,126	7,920	8,157	11,203	11,539	11,885	12,241	12,609	12,987
Local New Tournament	75%	2	672	685	699	1,426	1,455	1,484	1,514	1,544	1,575	1,606
Youth Lacrosse Leagues (Weeks -	100%	1	2,851	2,851	2,851	2,851	2,851	2,851	2,851	2,851	2,851	2,851
Camps/Programs	100%	4	352	356	718	725	733	740	747	755	762	770
Practices (Weeks)	100%	2	3,485	3,485	3,485	3,485	3,485	3,485	3,485	3,485	3,485	3,485
High School Regional/State Lacros	90%	1	174	174	348	348	348	348	348	348	348	348
Total			12,511	12,677	16,021	16,993	20,074	20,446	20,829	21,224	21,629	22,047
Rugby/Football												
Competitive New Tournament	60%	2	622	641	660	1,360	1,400	1,442	1,486	1,530	1,576	1,623
Local New Tournament	75%	2	0	0	0	0	0	271	276	280	284	288
Camps/Programs	100%	4	242	244	247	249	252	509	514	519	524	529
Practices (Weeks)	100%	2	1,742	1,742	1,742	1,742	1,742	1,742	1,742	1,742	1,742	1,742
Adult Rugby League (Weeks)	100%	2	858	858	858	858	858	858	858	858	858	858
High School Regional/State Events	90%	1	70	70	70	70	70	70	70	70	70	70
Total			3,535	3,556	3,578	4,280	4,323	4,893	4,946	5,000	5,055	5,112
Other												
Area Schools	100%	1	2,371	2,569	2,766	2,766	2,766	2,766	2,766	2,766	2,766	2,766
JBLM Events	95%	1	475	950	950	950	950	950	950	950	950	950
Other Non-Sport Events	80%	1	960	960	1,440	1,440	1,920	1,920	2,400	2,400	2,400	2,400
Total			3,806	4,479	5,156	5,156	5,636	5,636	6,116	6,116	6,116	6,116
			246,517	281,323	309,190	347,670	358,867	367,800	376,770	385,514	394,518	403,792
Source: Various Sports Organizations, Hunden Strategic Partners												

Visitation

The following table shows the net new visitor days and overnights as well as the resulting new hotel room nights, which serve as the basis for the impact model.

Net New Visitors and Room Nights									
	Year 1	Year 2	Year 3	Year 4	Year 5	Year 10	Year 15	Year 20	Total
New Daytrip Visitor Days	112,354	132,715	148,596	171,398	177,596	203,874	203,874	203,874	3,747,257
New Overnight Visitor Days	64,652	77,771	88,223	103,256	107,794	125,054	125,054	125,054	2,282,255
New Hotel Room Nights (Local)	25,861	31,108	35,289	41,302	43,118	50,022	50,022	50,022	912,902

Source: Hunden Strategic Partners

Over the twenty-year period, more than 3.7 million new daytrip visitor days and more than 2.2 million overnight visitor days are expected in the community . This should result in more than 912,000 new hotel room nights in the Pierce County area over the period.

Daily Spending

There will also be day-trippers who come to events at the sports facility for league play, camps as well as one-day tournaments. The attendees will spend on concession as well as spend on restaurants in the area. Visitors will come to the sports facility and spend money within its confines, but many locals and visitors will also spend new or increased funds at restaurants around the indoor sports facility. The daily spending by visitors and the overnight spending by overnight visitors all contribute to the economic impact of the Project. Spending assumptions are shown in the adjacent table. The per-person per-day spending for overnight guests total \$91.94 in Year 1 and increases with inflation. The daily spending per person for day trips is \$24.60 in the first year.

Estimated Spending Per Visitor Per Day - DuPont Sports Complex										
	Year 1	Year 2	Year 3	Year 4	Year 5	Year 6	Year 7	Year 8	Year 9	Year 10
Spending per Visitor - Overnight										
Onsite Food & Beverage	\$3.50	\$3.61	\$3.71	\$3.82	\$3.94	\$4.06	\$4.18	\$4.30	\$4.43	\$4.57
Offsite Food & Beverage	\$22.50	\$23.18	\$23.87	\$24.59	\$25.32	\$26.08	\$26.87	\$27.67	\$28.50	\$29.36
Total Food & Beverage	\$26.00	\$26.78	\$27.58	\$28.41	\$29.26	\$30.14	\$31.05	\$31.98	\$32.94	\$33.92
Lodging Spending	\$44.80	\$46.14	\$47.53	\$48.95	\$50.42	\$51.94	\$53.49	\$55.10	\$56.75	\$58.45
Retail Spending	\$4.75	\$4.89	\$5.04	\$5.19	\$5.35	\$5.51	\$5.67	\$5.84	\$6.02	\$6.20
Transportation Spending	\$8.14	\$8.38	\$8.64	\$8.89	\$9.16	\$9.44	\$9.72	\$10.01	\$10.31	\$10.62
Entertainment/Rec/Other	\$8.25	\$8.50	\$8.75	\$9.01	\$9.29	\$9.56	\$9.85	\$10.15	\$10.45	\$10.76
Total Direct Spending	\$91.94	\$94.70	\$97.54	\$100.47	\$103.48	\$106.58	\$109.78	\$113.07	\$116.47	\$119.96
Spending per Visitor - Daytrip										
Onsite Food & Beverage	\$1.75	\$1.80	\$1.86	\$1.91	\$1.97	\$2.03	\$2.09	\$2.15	\$2.22	\$2.28
Offsite Food & Beverage	\$13.50	\$13.91	\$14.32	\$14.75	\$15.19	\$15.65	\$16.12	\$16.60	\$17.10	\$17.61
Total Food & Beverage	\$15.25	\$15.71	\$16.18	\$16.66	\$17.16	\$17.68	\$18.21	\$18.76	\$19.32	\$19.90
Retail Spending	\$2.38	\$2.45	\$2.52	\$2.60	\$2.67	\$2.75	\$2.84	\$2.92	\$3.01	\$3.10
Transportation Spending	\$2.85	\$2.93	\$3.02	\$3.11	\$3.21	\$3.30	\$3.40	\$3.50	\$3.61	\$3.72
Other Spending	\$4.13	\$4.25	\$4.38	\$4.51	\$4.64	\$4.78	\$4.93	\$5.07	\$5.23	\$5.38
Total Direct Spending	\$24.60	\$25.34	\$26.10	\$26.88	\$27.69	\$28.52	\$29.37	\$30.25	\$31.16	\$32.10

Source: Hunden Strategic Partners

The incremental impact of the new spending from new and recaptured visitors will increase economic activity and will result in higher fiscal activity, income, and employment for the DuPont area economy. HSP uses the IMPLAN input-output multiplier model, which determines the level of additional activity in local economy due to additional inputs. For example, for every dollar of direct new spending in the community, the IMPLAN model provides multipliers for the indirect and induced spending that will result. The net new and recaptured direct spending discussed earlier in the chapter is considered to be the **Direct Impact**. From the direct spending figures, further impact analyses will be completed.

- **Indirect Impacts** are the supply of goods and services resulting from the initial direct spending. For example, a tournament attendee's direct expenditure on a hotel room causes the hotel to purchase linens and other items from suppliers. The portion of these hotel purchases that are within the local economy is considered an indirect economic impact.
- **Induced Impacts** embody the change in local spending due to the personal expenditures by employees whose incomes are affected by direct and indirect spending. For example, a waitress at a restaurant may have more personal income as a result of the event attendee's visit. The amount of the increased income that the employee spends in the area is considered an induced impact.

- **Fiscal Impacts** represent the incremental tax revenue collected by the community due to the net new economic activity. The fiscal impact represents the government's share of total economic benefit. Fiscal impacts provide an offset to the potential public expenditures required to support the development.
- **Employment Impacts** include the incremental employment provided not only onsite, but due to the spending associated with it. For example, the direct, indirect, and induced impacts generate spending, support new and ongoing businesses and ultimately result in ongoing employment for citizens. HSP will show the number of ongoing jobs supported by the project and provide the resulting income and income taxes generated.

Impact – DuPont Sports Complex

The table below shows the 20-year direct net new spending as a result of the recommended DuPont Sports Complex.

Direct Net New Spending (000s) - DuPont Sports Complex									
	Year 1	Year 2	Year 3	Year 4	Year 5	Year 10	Year 15	Year 20	Total
Food & Beverage	\$3,394	\$4,167	\$4,838	\$5,790	\$6,203	\$8,299	\$9,621	\$11,153	\$159,461
Lodging	\$2,896	\$3,590	\$4,195	\$5,058	\$5,439	\$7,319	\$8,488	\$9,843	\$140,266
Retail	\$574	\$705	\$819	\$981	\$1,051	\$1,407	\$1,631	\$1,891	\$27,025
Transportation	\$846	\$1,041	\$1,211	\$1,452	\$1,557	\$2,086	\$2,418	\$2,803	\$40,054
Other	\$997	\$1,225	\$1,422	\$1,703	\$1,825	\$2,443	\$2,833	\$3,284	\$46,939
Total	\$8,708	\$10,728	\$12,485	\$14,984	\$16,075	\$21,554	\$24,991	\$28,974	\$413,746

Source: Hunden Strategic Partners

Spending on lodging and food and beverage are the largest components of direct new spending in the community, followed by transportation, retail, and other local spending. Over 20 years, the DuPont Sports Complex is projected to generate more than \$413 million in direct net new spending within the community.

Impact – DuPont Sports Complex

The next table shows the direct, indirect, and induced spending from the Project based on the IMPLAN multipliers.

Direct, Indirect & Induced Net New Spending (000s) - DuPont Sports Complex									
	Year 1	Year 2	Year 3	Year 4	Year 5	Year 10	Year 15	Year 20	Total
Net New Spending									
Direct	\$8,708	\$10,728	\$12,485	\$14,984	\$16,075	\$21,554	\$24,991	\$28,974	\$413,746
Indirect	\$3,209	\$3,958	\$4,610	\$5,537	\$5,943	\$7,973	\$9,245	\$10,719	\$153,006
Induced	\$1,553	\$1,913	\$2,226	\$2,671	\$2,866	\$3,842	\$4,455	\$5,165	\$73,757
<i>Total</i>	<i>\$13,470</i>	<i>\$16,600</i>	<i>\$19,321</i>	<i>\$23,192</i>	<i>\$24,884</i>	<i>\$33,369</i>	<i>\$38,690</i>	<i>\$44,857</i>	\$640,509

Source: Hunden Strategic Partners

The direct spending totals \$413 million over the 20-year period (as shown in the prior table), while the indirect and induced spending add another \$153 million and \$73 million, respectively. In total, \$640 million in economic impact is projected from new and recaptured spending.

Impact – DuPont Sports Complex

The following table shows the new earnings associated with the new economic activity. Earnings are the portion of new spending that ends up as wages for employees in businesses in the local community.

Net New Earnings from Direct, Indirect & Induced Spending (000s) - DuPont Sports Complex

	Year 1	Year 2	Year 3	Year 4	Year 5	Year 10	Year 15	Year 20	Total
Net New Earnings									
From Direct	\$2,803	\$3,452	\$4,017	\$4,819	\$5,169	\$6,930	\$8,035	\$9,315	\$133,037
From Indirect	\$467	\$576	\$672	\$807	\$867	\$1,163	\$1,349	\$1,564	\$22,319
From Induced	\$105	\$129	\$151	\$181	\$194	\$260	\$301	\$349	\$4,987
<i>Total</i>	<i>\$3,375</i>	<i>\$4,158</i>	<i>\$4,839</i>	<i>\$5,807</i>	<i>\$6,230</i>	<i>\$8,353</i>	<i>\$9,685</i>	<i>\$11,228</i>	<i>\$160,343</i>

Source: Hunden Strategic Partners

By the fifth year of operations, more than \$6 million of direct, indirect, and induces earnings are projected, with a total of more than \$160 million over the 20-year period.

Impact – DuPont Sports Complex

The table below shows the estimated full-time equivalent jobs created by the Project. These new positions will be supported throughout the economy, not just in visitor-related jobs, although these will be most likely.

Net New Full-Time Equivalent Jobs from Direct, Indirect & Induced Earnings (000s) - DuPont Sports Complex								
	Year 1	Year 2	Year 3	Year 4	Year 5	Year 10	Year 15	Year 20
Net New FTE Jobs								
From Direct	289	348	394	461	481	559	559	559
From Indirect	44	53	60	70	74	85	85	85
From Induced	6	31	36	42	43	50	50	50
<i>Total</i>	<i>340</i>	<i>433</i>	<i>490</i>	<i>573</i>	<i>598</i>	<i>694</i>	<i>694</i>	<i>694</i>
Source: Hunden Strategic Partners								

New full-time equivalent jobs (FTE's) are projected to vary over the period based on the net new spending and total 598 by the fifth year.

Impact – DuPont Sports Complex

The fiscal impact of the Project is the benefit to the community via taxes generated. The following table shows the projections of new taxes over the first 20 years of operation.

Fiscal Impact - Tax Impacts from Net New Spending (000s) - DuPont Sports Complex									
	Year 1	Year 2	Year 3	Year 4	Year 5	Year 10	Year 15	Year 20	Total
Local Taxes Collected									
DuPont Hotel Occupancy Tax (5.0%)	\$34	\$35	\$36	\$37	\$38	\$44	\$51	\$59	\$903
TPA Assessment (\$0.50)	\$3	\$3	\$3	\$3	\$3	\$4	\$5	\$5	\$81
Local Sales Tax (2.8%)	\$220	\$271	\$316	\$379	\$407	\$545	\$632	\$733	\$10,463
Total	\$257	\$309	\$355	\$419	\$448	\$593	\$687	\$797	\$11,447
Source: Hunden Strategic Partners									

In total, local taxes are projected to generate more than \$448,000 by Year 5, and total more than \$11.4 million over the first 20 years.

Impact – DuPont Sports Complex

The table to the right shows a summary of estimated combined 20-year impacts for the recommended indoor sports complex.

The net new spending for the Project totals \$641 million over the 20-year period, \$160 million in new earnings, more than 694 new full-time equivalent jobs, and more than \$11.4 million in new taxes collected from the ongoing spending over 20 years.

Summary of Impacts - DuPont Sports Complex		
	20-Years	Stabilized Year
Net New Spending	(millions)	
Direct	\$414	\$19.2
Indirect	\$153	\$7.1
Induced	\$74	\$3.4
Total	\$641	\$30
Net New Earnings	(millions)	
From Direct	\$133	\$6.2
From Indirect	\$22	\$1.0
From Induced	\$5	\$0.2
Total	\$160	\$7.4
Net New FTE Jobs	Actual	
From Direct	559	527
From Indirect	85	80
From Induced	50	47
Total	694	654
Local Taxes Collected	(000s)	
DuPont Hotel Occupancy Tax (5.0%)	\$903	\$41
Total	\$11,447	\$41
Source: Hunden Strategic Partners		



Thank You