

Leon County Economic Feasibility Assessment

Leon County, Florida

June 29, 2012



Table of Contents

Executive Summary ii

Section One: Introduction 1

Section Two: Demographics and Economic Characteristics 2

Section Three: National and Florida Sports Trend Analysis 8

Section Four: Regional Competition Assessment 18

Section Five: Pro Forma Revenues & Expenditures 39

Section Six: Economic Impact 54

Section Seven: Site Selection 55

Appendix A: Regional Sports Trend Analysis 95

Appendix B: Participation Trends by Gender as it Applies to Support Opportunities 113

Appendix C: Fieldhouse Case Study Imagery Source List 114

Executive Summary

The purpose of this report, the Leon County Economic Feasibility Assessment, is provided herein to assist in the decision making regarding the feasibility of a sports complex or facility that can attract large, regional, multi-state and national tournaments and events to the area as part of an economic development strategy for Leon County, Florida. Towards that end, this report provides a full study and review of the market for these types of facilities, competitor analysis, sports and recreation participation and spending trends, potential site evaluations, and facility recommendations with capital costs. The full report also provides a pro-forma model illustrating how the facility will monetize as well as the economic impact for the entire County.

Summary of Results

The final results of the study have determined that a large indoor sports facility, often referred to as a fieldhouse, located within Leon County, would provide the best opportunity for economic development within the sports tourism market by capturing potential total revenues, after stabilization, of \$1.69 - \$2.64 million per year directly at the facility for years 1 through 6. Additionally, it was computed that this facility could have a major impact on the local economy by bringing in \$17 million in direct spending with a total local economic impact of \$25 million each year, or an increase of 476 jobs within the local community. The fieldhouse program developed within this study provides opportunities to host large local, regional and national tournaments and events, while providing the local residents a facility that is currently not available. Many sports could utilize the fieldhouse including basketball, indoor soccer, indoor lacrosse, cheerleading, volleyball, gymnastics, etc. A multipurpose field sports complex containing 12 multiuse fields, with an future expansion to 16 fields, was identified as a secondary priority, to serve the growing markets within soccer, lacrosse, rugby, and many other field sports.

Overview of Report

The first phase of the project identified and defined the market needs through both qualitative and quantitative methods. A competitive analysis for Leon County was analyzed from a local perspective and a regional (200-mile radius) perspective. Facilities with six or more fields that included baseball and softball fields and/or soccer/multi-purpose fields were analyzed. Facilities with 6 or more ball fields and/or soccer/multi-purpose fields generally draws a more advanced recreational and competitive market that is attracted to tournaments, instructional, and consumer preference orientations for the game they like to play. Also, the analysis looked at indoor facilities due to the large numbers of participants who play basketball, volleyball, cheerleading, indoor soccer, and wrestling. Lastly, ATV/Motocross parks in the region were identified and analyzed as well for the Leon County market.

The Consulting Team evaluated 51 sport locations within the 200 mile radius and 19 local sites. This distance represents the typical maximum drive distance for regional sports tourism. There were thirteen (13) identified competitors within 100 mile radius of the Leon County location, including several local sites from within Leon County. Also, there were 17 identified competitors between the 100 – 150 mile radius and 21 competitors beyond the 150 mile radius. The majority of these competitors were the sports complexes and multiple ball field facilities. Indoor facilities, however, were much less prominent, within only 2 large indoor facilities within the 200 miles radius. These included the Jacksonville Sportsplex and the Pinellas Indoor Soccer Academy.

Due to the unique nature of these large facilities, very few exist within the Southeast, with the exception of field houses built at many major colleges and universities, in conjunction with their athletic programs. A recent state of the art fieldhouse was open in 2011 in Orlando by Disney called the HP Fieldhouse. Other large fieldhouses, suitable for tournament and sports tourism can be found in major metropolitan communities such as Indianapolis, Virginia Beach, and Denver.

The report also reveals which sports are best suited for Leon County based on a competition analysis, participation trends and typical spending trends. Sports with well positioned for Leon County that have low regional competition include basketball, volleyball, lacrosse, rugby, cheerleading, and ATV. Sports with high growth and participation were also examined. Lacrosse, rugby, tennis, cheerleading and volleyball are all high growth sports, followed by soccer, basketball and gymnastics as mature sports. Sports that are in decline include baseball, softball and football. However, while in decline, the total number of participants for the declining sports, still outnumber the newer, growing sports. The highest levels of spending per day, include baseball, volleyball, cheerleading, gymnastics, and rugby, followed by soccer, lacrosse, basketball, football, softball, ATV and tennis. For example, daily spending within the community could be \$127 per person per day for girls softball or \$97 per person per day on basketball.

Based on the data reviewed from the sports trends, demographic analysis, competitor assessment, and the size of the sports market for various sports activities, it was recommended the following be considered for development based on the market and destination factors.

- Multi-functional outdoor sports complex that could serve soccer, lacrosse, field hockey, rugby, football and ultimate-frisbee should be considered in one facility setting. The complex should be in the 12-16 field size that can support these sports during prime seasons.
- Indoor Sports Field House that could support basketball, volleyball, indoor soccer, indoor lacrosse, wrestling, cheerleading, and martial arts. At minimum, the facility should include 10-12 basketball courts, 16 volleyball courts, accommodate 12 wrestling mats, 2 indoor soccer/lacrosse fields, and should be used for other non-sporting events during non-prime times.

From this data the Consulting Team evaluated the capital costs and operational cost to determine which type of sports complex would provide the greatest operational cost return and economic impact to Leon County.

The following table outlines a summary of revenues and expenses that a Multi-Purpose Fields Sports Complex will generate in operating revenues and expenses. These costs are based on a set of assumptions based on the market and how the facility will be used to support local and regional/national tournaments.

Pro Forma Revenues & Expenditures						
LEON COUNTY MULTI-PURPOSE FIELDS SPORTS COMPLEX						
REVENUES AND EXPENDITURES						
	1th Year	2nd Year	3rd Year	4th Year	5th Year	6th Year
Revenues*						
External	\$539,900.00	\$556,097.00	\$572,779.91	\$589,963.31	\$607,662.21	\$625,892.07
Internal	\$366,100.00	\$377,083.00	\$388,395.49	\$400,047.35	\$412,048.78	\$424,410.24
Total Revenues	\$906,000.00	\$933,180.00	\$961,175.40	\$990,010.66	\$1,019,710.98	\$1,050,302.31
Expenditures	\$1,417,171.33	\$1,461,663.90	\$1,507,917.41	\$1,556,001.89	\$1,605,990.14	\$1,657,957.87
Net Revenues Over (Under)						
Expenditures	(\$511,171.33)	(\$528,483.90)	(\$546,742.01)	(\$565,991.22)	(\$586,279.15)	(\$607,655.56)
Total Cost Recovery	64%	64%	64%	64%	63%	63%
*NOTE: Revenues assume a full-time year of operations. First year revenues could be significantly less based on when during the fiscal year the facility starts operations, and the initial marketing and promotional efforts. PROS anticipates that the full potential revenues will be reached by the fifth year of operations.						

The following table outlines a summary of revenues and expenses that a Multi-Purpose Field House Sports Complex will generate in operating revenues and expenses. These costs are based on a set of assumptions based on the market and how the facility will be used to support local and regional/national tournaments.

Pro Forma Revenues & Expenditures						
LEON COUNTY FIELDHOUSE						
REVENUES AND EXPENDITURES						
	1th Year	2nd Year	3rd Year	4th Year	5th Year	6th Year
Revenues*						
External	\$601,300.00	\$619,339.00	\$657,056.75	\$717,983.65	\$808,096.92	\$936,805.81
Internal	\$1,092,000.00	\$1,124,760.00	\$1,193,257.88	\$1,303,905.11	\$1,467,556.69	\$1,701,300.42
Total Revenues	\$1,693,300.00	\$1,744,099.00	\$1,850,314.63	\$2,021,888.75	\$2,275,653.61	\$2,638,106.23
Expenditures	\$1,421,875.20	\$1,453,629.44	\$1,486,649.35	\$1,520,985.42	\$1,556,690.16	\$1,593,818.17
Net Revenues Over (Under)						
Expenditures	\$271,424.80	\$290,469.56	\$363,665.28	\$500,903.34	\$718,963.45	\$1,044,288.06
Total Cost Recovery	119%	120%	124%	133%	146%	166%
*NOTE: Revenues assume a full-time year of operations. First year revenues could be significantly less based on when during the fiscal year the facility starts operations, and the initial marketing and promotional efforts. PROS anticipates that the full potential revenues will be reached by the fifth year of operations.						

Based on the performance of each of the facilities, the indoor field house model shows a higher level of potential revenue. Also, based on the fact that Leon County contains several sports complexes, including the state of the art facility at the FSU intramural sports complex, the field house again appeared to be a higher priority than the multipurpose field sports complex.

Another key item within the report focused on the total positive financial impacts of having a facility with the capability of bringing many sports related visitors to Leon County. A model was created based on hosting 30 tournaments each year containing an average of 50 teams, which is a moderate assumption. This basic model is able to illustrate how additional spending of +/- \$17 million can be captured within Leon County through items such as hotels, restaurants, retail and associated services per year. This level of direct spending could provide an increase in over \$1.3 million a year in additional sales tax.

The team then provided a site evaluation study looking at potential locations for both the fieldhouse and the multipurpose field sports complex. This evaluation considered 21 individual sites spread throughout Leon County. Further analysis was provided on 21 sites for the fieldhouse and 15 sites for the sports complex, which was constrained by the large number of required acres (minimum 80 acres). Specific evaluation criteria related to connectivity (I-10, major roadways, etc), proximity (hotels, retail, etc.) and site data (topography, vegetation, etc) were scored for each site. All the scores were added to reveal the most suitable sites for each facility. Top sites for the fieldhouse include: downtown (O'Connell property), Northwood Center, Fairgrounds, Tallahassee Mall, and Capital Circle NW / Highway 90 (Tax World). The top sites for the multipurpose field sports complex include the fairgrounds, Welaunee (Heel), Tallahassee Mall, and Devoe Moore properties.

Potential capital costs were determined through the creation of a preliminary opinion of probable construction cost. These estimates were shown to have a range of values that included high and low cost probability, suitable for early budgeting purposes. The multipurpose field sports complex was estimated at a range of \$12.8 to \$19.1 million. Based on the direction by the steering committee, the team provided prototypical site diagrams for the fieldhouse to show an urban and suburban location. These diagrams were then used for capital cost determination for the fieldhouse options at a range of \$27.5 to \$35.8 million.

Conclusion

Based on the findings of the report, it has been determined that Leon County has a strong sports tourism economic development opportunity with the development of a large fieldhouse and a multipurpose field sports complex. Based on potential revenue opportunities, supported by both internal and external revenues at these proposed facilities, the strongest opportunity for success is likely to be the fieldhouse proposal. With indoor sports and events, weather and field maintenance are never a factor to consider when booking a tournament. Also, a fieldhouse, when built to consider the local Leon County market, could be paired with other programmatic elements or partnering opportunities, such as the potential hotel convention center, to help achieve the greatest return on investment.

Section One: Introduction

Real Estate InSync, Wood and Partners and PROS Consulting, LLC was hired by Leon County to evaluate the concept of developing a sports complex to attract large, regional and multi-state events. The direction set by Leon County was to identify opportunities and demand generators that could positively impact the region economically from sports related activities and the type of facilities that provide the greatest economic impact.

PROS evaluated indoor and outdoor sports including basketball, volleyball, cheerleading, gymnastics, indoor soccer, wrestling, baseball, football, lacrosse, rugby, soccer, and softball. These sports require specific facilities to hold events. Also, the Off-Highway Motorcycles (OHM) and ATV market was evaluated. Events such as triathlons, road races, and bicycle races provide economic impact, but were not considered for this study.

Market characteristics were evaluated that included demographic/economic data, accessibility, income levels of targeted groups, other tourism related reports, competition assessment of other sport related facilities in the region (200 mile radius) and the type of programs and events they provide. The 200 mile radius was chosen because 90% of the user base is from this market in most sport feasibility studies completed based on previous experience. Also, it is established on the evaluation of the market of sports users that travel to competitive sporting events. It is recognized that there will be some teams and participants who will travel more than 200 miles for events especially when an event is a national tournament. Leon County desires to attract participants country-wide when they can to build a destination sports location.

The PROS team has worked diligently to provide objective analysis and recommendations towards the development of these sports complex opportunities, as well as other types of facilities for the region.

1.1 Scope

The Needs Assessment evaluated the feasibility of a sports complex that can attract large, regional, multi-state tournaments and national tournaments to the area as part of an economic development strategy. The first phase of the project identified and defined the market needs through both qualitative and quantitative methods. Specific elements of the project Phase 1 – Tasks 1 & 2 included:

Phase 1 Services:

1. Task 1: Inventory Existing Facilities & Properties
 - 1.1 Kickoff Meeting to discuss outcomes desired
 - 1.2 Evaluation of the 200 mile market demographics, income characteristics and national and regional trends in each sport evaluated
 - 1.2 Identification of relevant sporting facilities and parks within 200 miles
 - 1.3 General review of local assets and relevant recreation properties – (County provided)
2. Task 2: Market Assessment & Recreational /Revenue Trends
 - 2.1.a Market Assessment – Establish the highest financial rates of return for various types of sports facilities based on the competition and who attends these events
 - 2.1.b Synthesize Market assessment and revenue trends
 - 2.2 Review County and KCCI selected sites for appropriateness (3 sites)
 - 2.3 Meet with County staff to review all data and market assessments to determine what types of facilities would support the greatest revenue and return on investment including economic return

Section Two: Demographic and Economic Characteristics

PROS determined the demographic characteristics of the target market area associated with various needs including the size of the market served. All future demographic projections are based on historical trends and projected out utilizing straight line linear regression. All projections should be used with the understanding that unforeseen circumstances during or after the time of the projections could have a significant bearing on the validity of the final projections.

2.1 Methodology

Demographic data used for the analysis was obtained from Environmental Systems Research Institute, Inc. (ESRI), the largest research and development organization dedicated to Geographical Information Systems (GIS) and specializing in population projections and market trends. All data was acquired in April 2012 (i.e. Source: ESRI; 2012 04), and reflects actual numbers as reported in the 2000 and 2010 Census and demographic projections for 2015. The boundaries for Leon County with a 200 mile radius are shown below in **Figure 1**. This 200-mile radius was used because 90% of participants travel to sporting events within 200 miles according to previous studies performed by PROS.

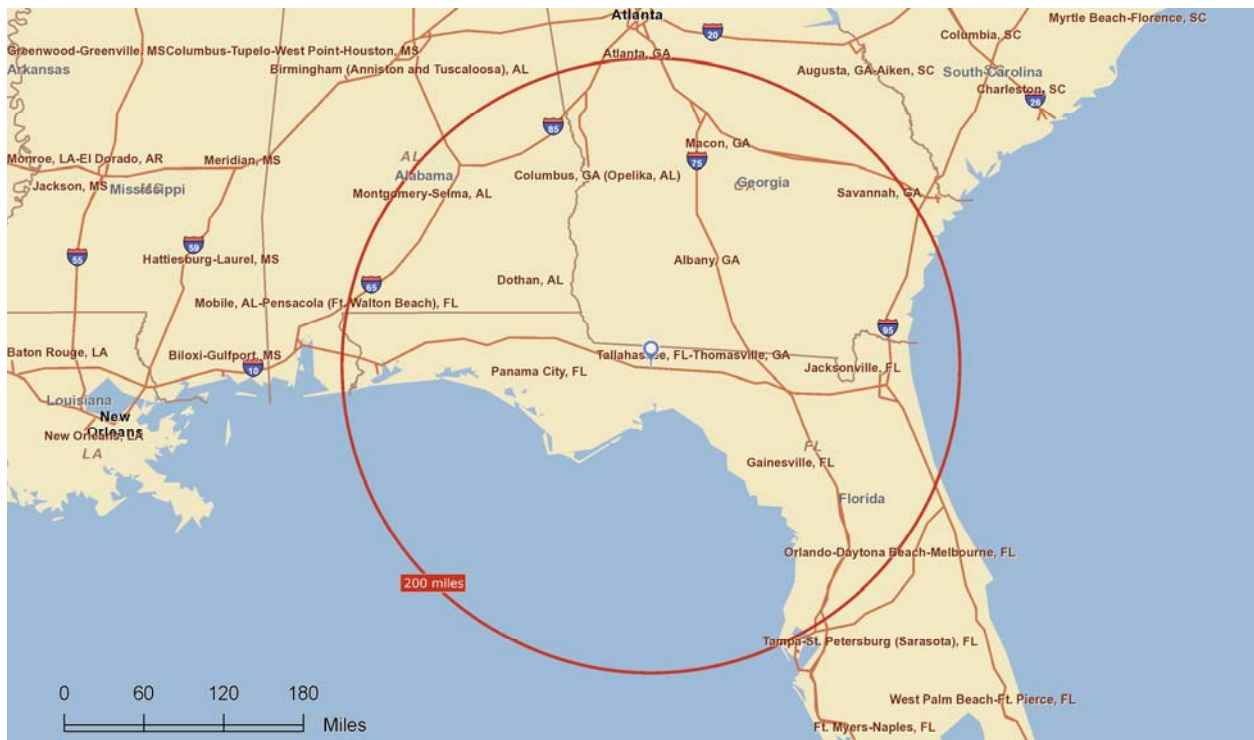


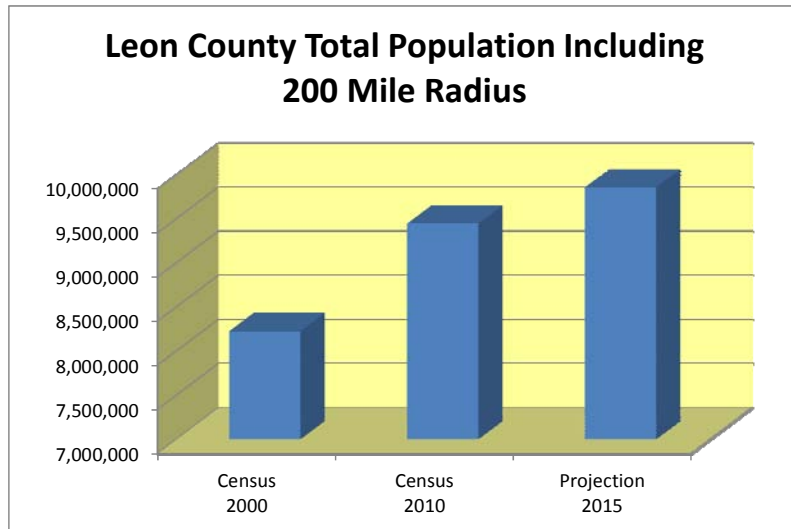
Figure 1 - Boundaries for Leon County with 200 mile radius

2.2 Target Area Populace for the Feasibility Study

PROS evaluated the following populace for the feasibility study which is described in the following elements within the 200 mile radius:

2.2.1 Population

The general target area including all areas within the 200 mile radius has grown at a steady pace since 2000. From 2000 to 2010, the population increased from 8,227,263 to 9,446,081. Five-year projections reflect a continued increase in the populace; in 2015 it is projected the population will increase to 9,858,178; a 0.86% increase.



2.2.2 Age Segment

The population by age segment slightly skewed to the national norms. Comparing to the typical aging trends, the Leon County largest individual age segment is 45-54 years of age with a median age of 39.6 and 28.8% of the population is 55+. Nationally the major age segment is 45-54 with a median age of 37 and 21% of the population is 55+. Currently, the top three age segments in terms of total persons have been and are projected to remain consistent through the next five years, 55-64 years of age, 45-54 years of age, and 15-24 years of age. The three smallest age segments are the following: 10-14 years of age, 75-84 years of age, and 85+ years of age.

Figure 2 --Leon County & Target Market Area (200-Mile Radius) Population Trends

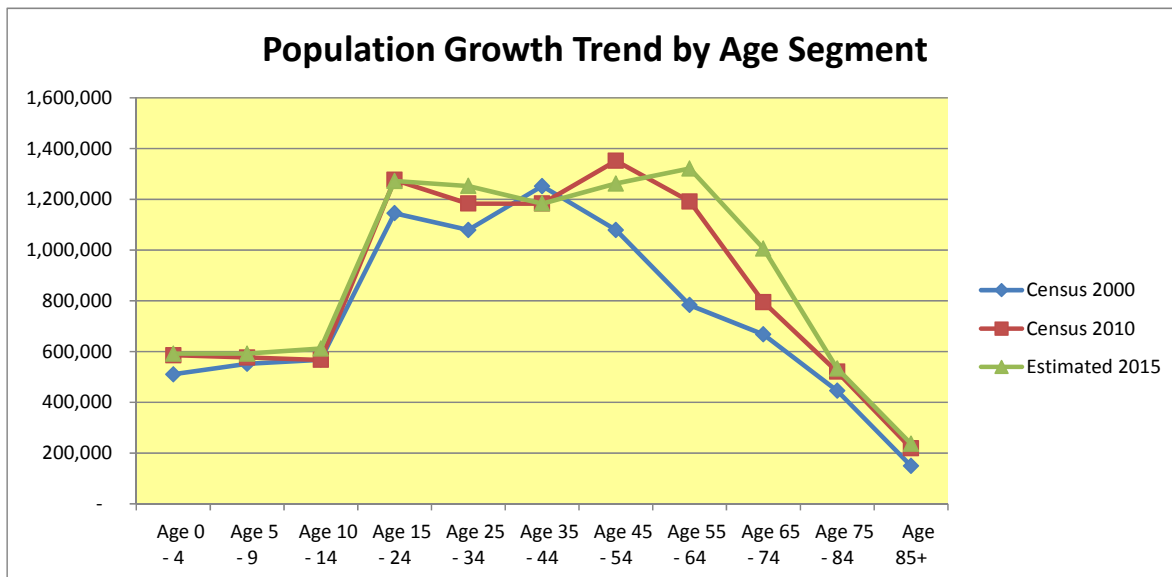


Figure 3 - Population by Major Age Segment

2.2.3 Gender

The gender distribution for the general populace of the target area is fairly evenly split between the genders. Currently female totals account for 50.9% and male totals account for 49.1% of the total population (**Figure 4**). This distribution is projected to remain constant throughout the next five years. National trends of gender distribution are 49.2% for male and 50.8% account for female.

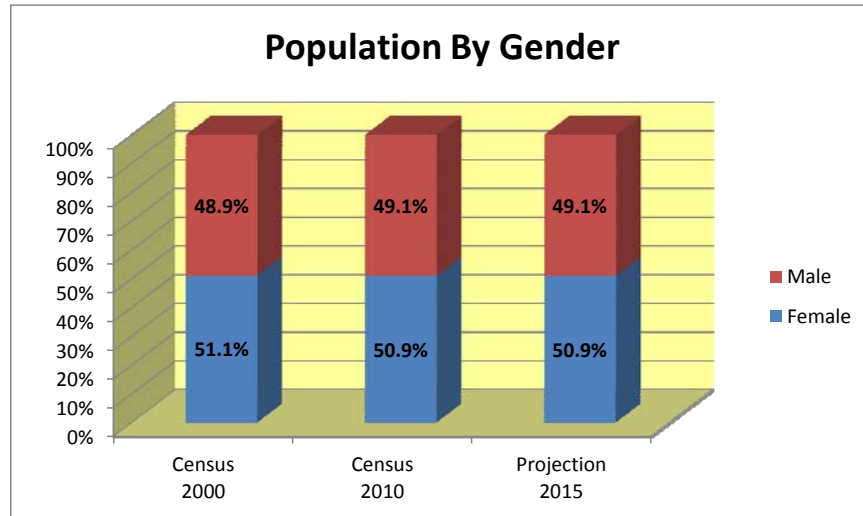


Figure 4 - Population by Gender

2.2.4 Race and Ethnicity

Racial composition of a populace provides guidance for decision making based on historical and cultural heritage. In the case of the target area, persons classified as white account for 70.8% of the populace; persons classified as black make up the next largest racial category – 23.1% of the population and all other categories account for 6.1% (**Figure 5**).

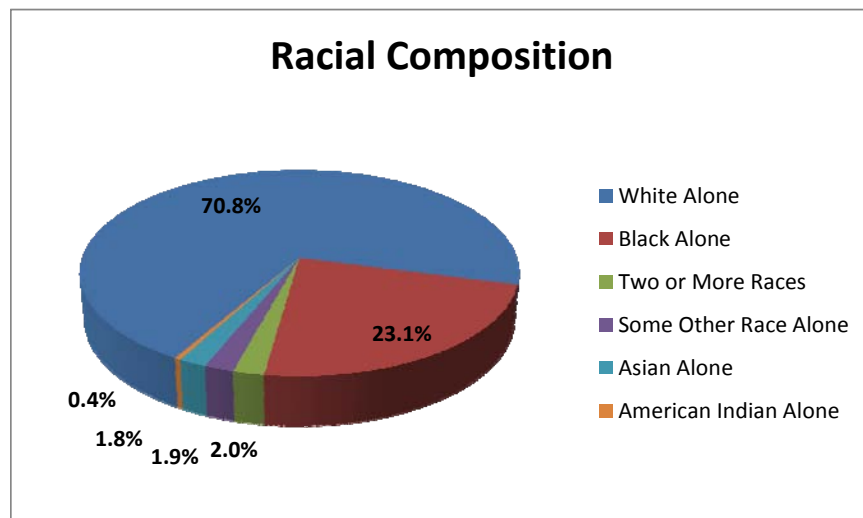


Figure 5 - Racial Composition

2.2.5 Participation Trends by Race

The following participation trends are both recreational and sports focused. This information is provided to recognize trends on a macro level in both sports and recreation.

The white population as a whole participates in a wide range of activities, including both team and individual sports of a land and water based variety; however, the white populace has an affinity for outdoor non-traditional sports.

Ethnic minority groups in the United States are strongly regionalized and urbanized, with the exception of Native Americans, and these trends are projected to continue. Different ethnic groups have different needs when it comes to recreational activities. Ethnic minority groups, along with Generations X and Y, are coming in ever-greater contact with white middle-class baby-boomers with different recreational habits and preferences. This can be a sensitive subject since many baby-boomers are the last demographic to have graduated high school in segregated environments, and the generational gap magnifies numerous ideals and values differences which many baby-boomers are accustomed to. This trend is projected to increase as more baby-boomers begin to retire, and both the minority and youth populations continue to increase.

Hispanic and Latino Americans have strong cultural and community traditions with an emphasis placed on the extended family, many times gathering in large recreational groups where multiple activities geared towards all age segments of the group may participate. Large group pavilions with picnicking amenities and multi-purpose fields are integral in the communal pastime shared by many Hispanics.

Utilizing the Ethnicity Study performed by American Sports Data, Inc., a national leader in sports and fitness trends, participation rates among recreational and sporting activities were analyzed and applied to the race/ethnic groups of the County – those classified as white, black, of Hispanic/Latino origin, and Asian.

A participation index was also reviewed. An index is a gauge of likelihood that a specific ethnic group will participate in an activity as compared to the U.S. population as a whole. An index of 100 signifies that the segment participation is on par with the general population; an index less than 100 means that the segment is less likely to participate, more than 100 signifies the group is more likely to participate.

The most popular activities for those classified as **white** in terms of total participation percentage, the percentage by which you can multiply the entire population by to arrive at activity participation of at least once in the past twelve months, are:

1. Recreational Swimming – 38.9% participation rate (38.9% of the population has participated at least once in the last year)
2. Recreational Walking – 37.0% participation rate
3. Recreational Bicycling – 20.6% participation rate
4. Bowling – 20.4% participation rate
5. Treadmill Exercise – 19.1% participation rate

Sailing (Index of 124), kayaking (Index of 121), and golf (Index of 120) are three activities that the Caucasian population is more likely to participate in than the general public.

Analyzing the top five activities that the **Black** populace participates in at the greatest rate results in:

1. Recreational Walking – 26.7% participation rate
2. Recreational Swimming – 20.2% participation rate
3. Basketball – 19.8% participation rate
4. Bowling – 17.5% participation rate
5. Running/Jogging – 14.3% participation rate

The black population, like the Hispanic population, is more than twice as likely to participate in boxing (Index of 208). Football (Index of 199) and basketball (Index of 160) are also among the higher participated in activities among the African-American populace.

The five most popular activities for those of **Hispanic/Latino** descent are:

1. Recreational Swimming – 33.2% participation rate
2. Recreational Walking – 31.2% participation rate
3. Recreational Bicycling – 19.7% participation rate
4. Bowling – 18.5% participation rate
5. Running/Jogging – 18.0% participation rate

In terms of participation index, the Hispanic populace is more than twice as likely as the general population to participate in boxing (Index of 264), very likely to participate in soccer (Index of 177), and more likely to participate in paintball (Index of 155) than any other ethnic group. For comparison reasons, although Hispanics are nearly twice as likely to participate in soccer as any other race, only 9.0% of the Hispanic population participated in the sport at least once in the last year.

The top five recreational activities for the **Asian** populace in regards to participation percentages are:

1. Recreational Walking – 33.3% participation rate
2. Recreational Swimming – 31.9% participation rate
3. Running/Jogging – 21.6% participation rate
4. Bowling – 20.5% participation rate
5. Treadmill Exercise – 20.3% participation rate

The Asian populace participates in multiple recreational activities at a greater rate than the general population, with lacrosse being the activity boasting the greatest index of 615. Squash (Index of 414), mountain/rock climbing (Index of 262), yoga/tai chi (Index 229), martial arts (227), artificial wall climbing (224), badminton (222), and rowing machine exercise (206) each represent an activity that Asian's are more than twice as likely to participate in than the general public.

2.2.6 Households and Income

The target area household count has changed from 3,227,605 as reported in Census 2000 to 3,731,148 in 2010. The five-year projection places household totals at 3,907,090 in 2015. Average household size is currently at 2.44 persons, compared to 2.45 in the year 2000. The number of families in the current year is 2,484,349 in the market area.

Currently, 58.8% of the 4,485,998 housing units in the market area are owner occupied; 24.3% are renter occupied, and 16.9% are vacant. Home values statistics are:

- Median home value (2010) in the demographic area is \$109,779, compared to a median home value of \$157,913 for the US
 - It is projected that in 2015 the median home value will increase to \$178,501

Household income characteristics statistics are:

- Current median household income for the target area is \$44,089, compared to \$54,552 for all U.S. households
 - Median household income is projected to reach \$51,003 by 2015
 - In 2000, median household income was \$35,016
- Current average household income is \$55,430, compared to \$70,173 for all U.S. households
 - Average household income is projected to reach \$61,166 in 2015
 - In 2000, average household income was \$46,453
- Current per capita income is \$22,462, compared to the U.S. per capita income of \$26,739
 - The per capita income is projected to be \$24,860 in 2015
 - In 2000, the per capita income was \$18,640

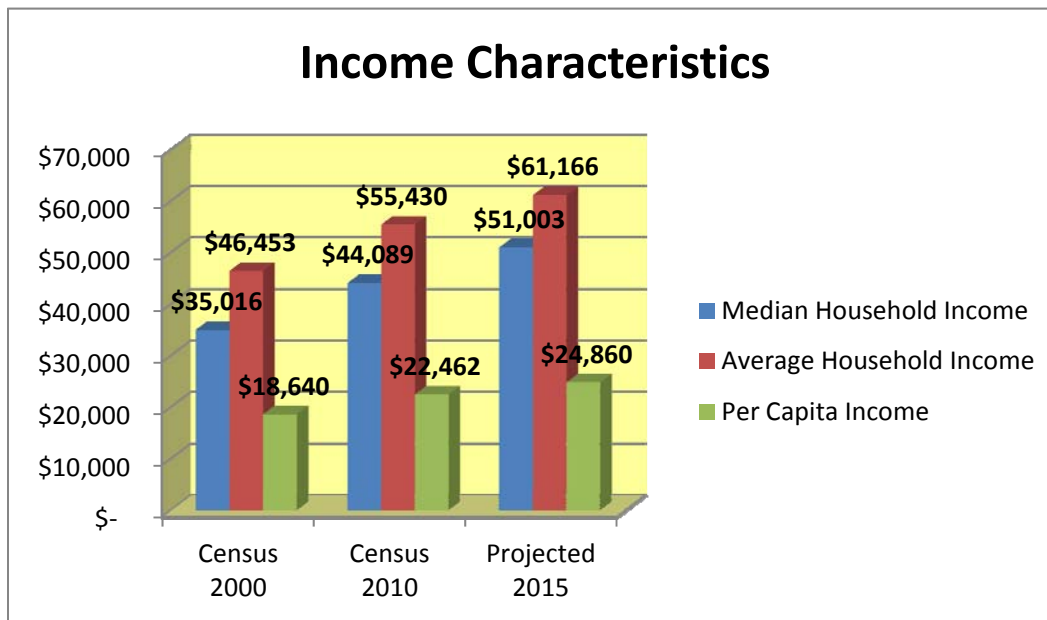


Figure 6 - Income Characteristics

Section Three: National and Florida Sports Trend Analysis

In evaluating a need for a sports complex the process includes evaluating the following elements:

1. Is there a market or demand based on the size of the market for a specific sport?
2. What are the appropriate program elements and the trends in the market for each specific sport being analyzed?
3. Who else is in the market place and the area suppliers within the targeted region and are these sites viable for tournament type events and clinics?
4. What are the current usage levels?
5. What is the age of the competitive facilities and their capability to adjust to the market changes?

3.1 National Sports and Recreation Trends

Information released by Sporting Goods Manufacturers Association (SGMA) 2010 study of Sports, Fitness, and Recreation Participation reveals that most of the popular sport and recreational activities include, walking, treadmill, running/jogging, bicycling, and billiards/pool. Most of these activities appeal to both young and old alike, can be done in most environments, can be enjoyed regardless of level of skill, and have minimal economic barriers to entry. These popular activities also have appeal because of the social aspect: people enjoy walking and biking together, and although fitness activities are mainly self-directed, many can offer a degree of camaraderie.

Walking has remained one of the two most participated in activities of the past decade. Walking participation during the last year data was available (2010), with a reported 114 million Americans walked at least once.

From a traditional team sport standpoint, basketball ranks highest among all sports in terms of participatory base with 26.3 million persons reportedly participating in 2010. **Two sports experiencing participation and growth are lacrosse and tennis** – both have seen double digit growth over the past decade; lacrosse has outright exploded. Ultimately, the greatest growth of participation in recreational activities has occurred in activities that have low barriers to entry, can be undertaken within close proximity to home, and can be completed in a limited amount of time.

3.2 Trending Source

The Sporting Goods Manufacturers Association (SGMA) Sports, Fitness & Recreational Activities Topline Participation Report 2011 was utilized to evaluate national sport and fitness participatory trends. SGMA is the number one source for sport and fitness research. The study is based on online interviews carried out in January and February 2011 from more than 38,000 individuals and households.

3.3 National Sports Trend Analysis

Traditional sports, often referred to as the social glue that bonds the country, play an important role in American society. By teaching important values of teamwork and discipline while stressing physical fitness and a healthy lifestyle, sports have been the building block for many Americans.

Basketball, a game originating in the U.S., is actually the most participated in sport among the traditional “bat and ball” sports with more than twenty-six million (26.3 million) estimated participants. This popularity can be attributed to the ability to compete with relatively small number of participants, the limited amount of equipment needed to participate, and the limited space requirements necessary – the last of which make basketball the only traditional sport that can be played at the majority of American dwellings as a drive-way pickup game. Interestingly, basketball participation rate increased by almost 10% from 2009 to 2010 (**Figure 7**).

Since 2007, lacrosse and other niche sports like rugby have seen strong growth. Based on survey findings, lacrosse is experiencing continued growth over the past decade (218%) and over the past year ('09-'10), lacrosse has grown 37.7%. From 2007 – 2010 Rugby has grown 83.1%. Another noticeable growth was participation in tennis; from 2000-2010 tennis has grown 45.7%.

National Participatory Trends; by Activity - General Sports	2000	2007	2008	2009	2010	% Change '09-10	% Change '08-10	% Change '07-10	% Change '00-10
Baseball	15,848	16,058	15,030	13,837	14,558	5.2%	-3.1%	-9.3%	-8.1%
Basketball	26,215	25,961	26,254	24,007	26,304	9.6%	0.2%	1.3%	0.3%
Cheerleading	2,634	3,279	3,104	3,036	3,232	6.5%	4.1%	-1.4%	22.7%
Ice Hockey	2,432	1,840	1,902	2,134	2,145	0.5%	12.8%	16.6%	-11.8%
Football, Touch	15,456	13,472	10,493	8,959	8,367	-6.6%	-20.3%	-37.9%	-45.9%
Football, Tackle	8,229	7,939	7,692	6,794	6,905	1.6%	-10.2%	-13.0%	-16.1%
Gymnastics	4,876	4,066	3,883	4,021	4,815	19.7%	24.0%	18.4%	-1.3%
Rugby	N/A	617	690	750	1,130	50.7%	63.8%	83.1%	N/A
Lacrosse	518	1,058	1,127	1,197	1,648	37.7%	46.2%	55.8%	218.1%
Soccer - Outdoor	N/A	13,708	14,223	13,691	14,075	2.8%	-1.0%	2.7%	N/A
Soccer - Indoor	N/A	4,237	4,737	4,913	4,927	0.3%	4.0%	16.3%	N/A
Softball, Fast Pitch	2,693	2,345	2,316	2,636	2,389	-9.4%	3.2%	1.9%	-11.3%
Softball, Slow Pitch	13,577	9,485	9,835	8,525	8,429	-1.1%	-14.3%	-11.1%	-37.9%
Volleyball, Court	N/A	6,986	8,190	7,283	7,346	0.9%	-10.3%	5.2%	N/A
Volleyball, Sand/Beach	5,248	3,878	4,171	4,476	5,028	12.3%	20.5%	29.7%	-4.2%
Racquetball	4,475	4,229	4,993	4,575	4,630	1.2%	-7.3%	9.5%	3.5%
Tennis	12,974	16,940	18,558	18,534	18,903	2.0%	1.9%	11.6%	45.7%

NOTE: Participation figures are in 000's for the US population ages 6 and over

Figure 7 - National Sports Participatory Trends

Traditional youth “powerhouse” sports including outdoor soccer and baseball have both experienced declines in participation over the study period; however, the sheer number of participant (14.5 million and 14.0 million, respectively) demands the continued support of these sports.

Demographic, Trends and Market Analysis
Multi-Purpose Fields Sports Complex & Fieldhouse

Leon County, Florida

Although team sports have slowly declined over the past decade throughout the U.S. it has seen a positive growth in 2010. The growth in youth team sports is now being driven by America’s 13 and 14 year olds, these are the peak ages of sports participation for children. Nearly 70% of children (age 6-17) in the U.S. are playing team sports and three out of four teenagers are now playing at least one team sport according to the SGMA annual participation study on team sports -- U. S. Trends in Team Sports (2011 edition).

According to the SGMA, five team sports have had strong increases in participation since 2009. They are Beach Volleyball (up 12.3%), Gymnastics (up 19.7%), Field Hockey (up 21.8%), Lacrosse (up 37.7%), and Rugby (50.7%). **Three more traditional mainstream team sports experienced single-digit growth in overall participation: Baseball (up 5.2%), Basketball (up 9.6%), Outdoor Soccer (up 2.8%), and Tackle Football (up 1.6%) across the United States.**

Off-Highway Motorcycles (OHM) and ATV’s are also showing growing trends throughout the nation. Information provided by the Motorcycle Industry Council sheds new light on industry trends. From 2003 to 2008 OHM/ATV population trends grew from 8 million to 11.6 million, a 45% increase. The following chart depicts vehicle population by region for 2008.

	ATV	OHM	Total	% of US
South	81%	19%	3,722,787	32%
West	65%	35%	2,754,460	24%
Midwest	81%	19%	2,921,695	25%
East	72%	28%	2,200,957	19%

Figure 8 - Vehicle Population by Region (Source: Motorcycle Industry Council)

The following information is based on a survey by the Motorcycle Industry Council on motorcycle and ATV owners. The graphs show riders by generation (**Figure 9-10**). Generation Y (Born 1980 and after) make up the majority of riders for both OHM and ATV. Baby Boomers (Born 1946-1964) and Generation X (Born 1965-1979) riders are fairly evenly split. Mature (Born 1945 and before) make up the least percentage for both OHM and ATV riders.

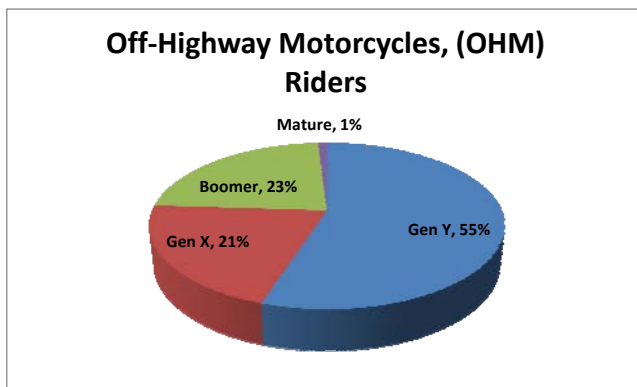


Figure 9 - OHM Riders (Source: Motorcycle Industry Council)

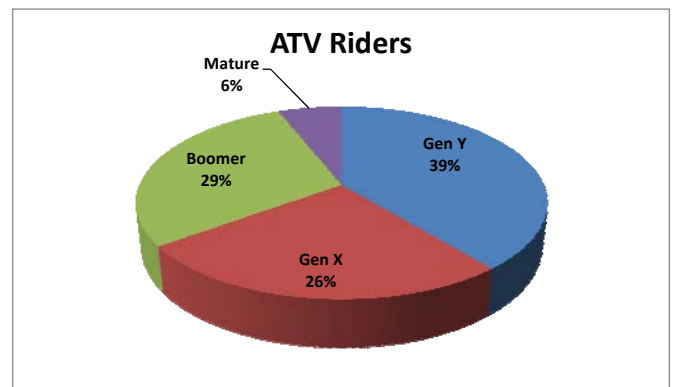


Figure 10 - ATV Riders (Source: Motorcycle Industry Council)

3.4 National Youth Team Sport Trends

The following information came from the Sports Marketing Surveys, USA who is the provider of research and analysis for Sporting Goods Manufacturers Association (SGMA). The following charts depict team sport trends by age segments (**Figure 11-13**).

Ages 6-11	Frequency	2008	2009	2010	2011	1 year change	2 year change
Baseball	13+ times	3,904	3,657	3,370	3,454	2.5%	-5.6%
Basketball	13+ times	3,455	3,260	3,208	3,328	3.7%	2.1%
Cheerleading	26+ times	530	488	437	496	13.6%	1.6%
Field Hockey	8+ times	80	122	134	74	-44.8%	-39.1%
Football (Tackle)	26+ times	833	797	738	676	-8.4%	-15.1%
Gymnastics	50+ times	561	614	698	852	22.0%	38.8%
Ice Hockey	13+ times	132	137	150	192	27.7%	40.3%
Lacrosse	13+ times	87	105	134	170	26.9%	62.7%
Rugby	8+ times	10	24	30	17	-44.1%	-31.3%
Soccer (Outdoor)	26+ times	2,436	243	2,570	2,686	4.5%	10.6%
Softball (Fast Pitch)	26+ times	173	169	180	235	30.3%	38.8%
Track and Field	26+ times	111	118	163	253	55.4%	114.0%
Volleyball (Court)	13+ times	346	371	439	398	-9.3%	7.3%
Volleyball (Sand)	13+ times	23	27	32	17	-47.6%	-37.7%
Wrestling	26+ times	196	199	218	218	-0.2%	9.6%
Swimming on a Team	50+ times				643		

Figure 11 - Team Sport Trends Ages 6-11 (Source: Sports Marketing Surveys, USA)

For children ranging from 6 to 11 years-old, track and field has grown tremendously over the past four years; within two years, track and field grew 114%. Other noticeable growth trends in team sport participation are lacrosse, ice hockey, gymnastics, and softball (fast pitch). Cheerleading has also experienced strong growth over the past year, growing by more than 13%.

Field hockey, rugby, and volleyball (sand) are experiencing significant declines in participation. Within the last year, all three team sports have declined by more than 40%.

**Demographic, Trends and Market Analysis
Multi-Purpose Fields Sports Complex & Fieldhouse**

Leon County, Florida

Ages 12-14	Frequency	2008	2009	2010	2011	1 year change	2 year change
Baseball	13+ times	1,453	1,428	1,577	1,503	-4.7%	5.3%
Basketball	13+ times	3,062	2,930	2,934	2,830	-3.5%	-3.4%
Cheerleading	26+ times	431	459	475	431	-9.2%	-6.1%
Field Hockey	8+ times	93	85	145	147	1.4%	74.0%
Football (Tackle)	26+ times	1,130	1,106	1,138	1,076	-5.5%	-2.8%
Gymnastics	50+ times	270	264	267	295	10.7%	11.7%
Ice Hockey	13+ times	89	95	73	94	29.0%	-1.1%
Lacrosse	13+ times	146	176	211	181	-14.0%	3.1%
Rugby	8+ times	24	17	22	17	-22.7%	0.0%
Soccer (Outdoor)	26+ times	1,244	1,173	1,103	1,085	-1.7%	-7.5%
Softball (Fast Pitch)	26+ times	314	313	256	282	10.2%	-10.1%
Track and Field	26+ times	686	700	740	792	7.0%	13.1%
Volleyball (Court)	13+ times	1,224	1,081	946	855	-9.6%	-20.9%
Volleyball (Sand)	13+ times	135	75	41	62	53.1%	-17.3%
Wrestling	26+ times	290	287	230	196	-14.6%	-31.7%
Swimming on a Team	50+ times				366		

Figure 12 - Team Sport Trends Ages 12-14 (Source: Sports Marketing Surveys, USA)

For children ranging from 12-14 years-old, Field Hockey grew by 74% within a two year period but slowed down greatly over the past year (1.4%). Other team sports trending strong growth are gymnastics, ice hockey, softball (fast pitch), track and field, and volleyball (sand).

Lacrosse, rugby, and wrestling are showing a decline in participation. Team sports like baseball, basketball, football (tackle), soccer (outdoor), and volleyball (court) are experiencing slight decline in participation in the past 1-2 years but the number of participants are great and need continual support.

**Demographic, Trends and Market Analysis
Multi-Purpose Fields Sports Complex & Fieldhouse**

Leon County, Florida

Ages 15-18	Frequency	2008	2009	2010	2011	1 year change	2 year change
Baseball	13+ times	1,088	1,085	1,122	1,185	5.6%	9.2%
Basketball	13+ times	2,478	2,495	2,527	2,506	-0.9%	0.4%
Cheerleading	26+ times	488	531	561	485	-13.6%	-8.7%
Field Hockey	8+ times	136	135	111	122	9.5%	-10.0%
Football (Tackle)	26+ times	1,309	1,212	1,165	1,275	9.5%	5.2%
Gymnastics	50+ times	250	198	283	301	6.4%	51.8%
Ice Hockey	13+ times	146	154	144	170	18.1%	10.1%
Lacrosse	13+ times	192	174	176	216	22.7%	24.5%
Rugby	8+ times	33	37	38	57	4.7%	52.7%
Soccer (Outdoor)	26+ times	1,075	1,069	953	861	-9.6%	-19.4%
Softball (Fast Pitch)	26+ times	275	309	277	232	-16.3%	-25.0%
Track and Field	26+ times	1,025	979	944	1,040	10.2%	6.2%
Volleyball (Court)	13+ times	998	868	758	847	11.7%	-2.5%
Volleyball (Sand)	13+ times	998	868	758	398	-47.5%	-54.1%
Wrestling	26+ times	424	368	298	294	-1.2%	-20.1%
Swimming on a Team	50+ times				283		

Figure 13 - Team Sport Trends Ages 15-18 (Source: Sports Marketing Surveys, USA)

For children ranging 15-18 years-old, lacrosse and ice hockey have shown strong growth trends over the past 1-2 years, 22.7% and 18.1% respectively. Gymnastics has also shown a strong growth over a two year period (51.8%) but experienced a slowdown in participation over the past year.

Noticeable declines in participation are in volleyball (sand) and softball (fast pitch). Volleyball (sand) has declined by more than 50% over a two year period and softball (fast pitch) declined by 25% in a two year period.

3.5 Sports Spending Levels

- Girls Fast Pitch Players– Two to three day events, players usually bring two parents and their siblings not involved in the tournament. Enjoy shopping before and after games. Spend on average \$127 per person per day
- Boys and Girls Soccer and Lacrosse– Usually a two to three day event. Girls spend more than boys and usually have three to four people with each player. Average \$110 per person per day
- Boys and Girls Basketball–Average two to three day event. Girls spend more than boys per day. Average spending per day per person is \$112
- Boy’s Baseball – Average two to three day event. Less teams due to the length of games. Average person spends \$97 per day

Demographic, Trends and Market Analysis
Multi-Purpose Fields Sports Complex & Fieldhouse

Leon County, Florida

- Men’s and Women’s Softball—Average two to three days per event. Usually only with themselves or partner. Spend on average \$85 per person per day.
- Swimming – Users spend on average \$67 per person per day as they are typically one day events.

The following chart shows projected spending levels in 2012 for different categories. A majority of team sport participants plan to **spend more money in their sport** or the same in each category.

	Spend More	Spend Same	Spend Less
Team Sports at School	22.8%	64.6%	12.6%
Team Sports Outside of School	21.6%	66.3%	12.4%
Travel for Sports and Rec.	22.5%	64.2%	13.3%
Lessons, Instruction and Camps	24.5%	62.9%	12.6%
Gym Memberships, Fees	20.7%	67.6%	11.7%
Individual Sports Events	23.1%	65.6%	11.3%
Golf Membership, Fees	15.5%	71.4%	13.7%
Tennis Membership, Fees	9.9%	77.2%	12.9%
Winter Sports	17.6%	66.8%	15.6%
Outdoor Recreation	20.7%	70.1%	9.2%
Sports/Rec. Clothing	16.5%	69.2%	14.3%
Sports/Rec. Footwear	16.4%	70.4%	13.2%
Sports/Rec. Equipment	16.0%	66.7%	17.3%

The following chart depicts which sports participants plan to spend more on **travel**.

	More	Same	Less	No Spending
Rugby	24.4%	51.3%	8.6%	15.7%
Field Hockey	19.6%	52.0%	3.0%	25.3%
Gymnastics	19.4%	39.9%	5.1%	35.6%
Softball (Fast Pitch)	17.7%	42.4%	15.9%	23.9%
Ice Hockey	16.7%	40.6%	10.4%	32.3%
Football (Tackle)	16.7%	41.8%	9.0%	32.5%
Track and Field	15.3%	47.4%	10.9%	26.5%
Baseball	15.0%	43.5%	7.7%	33.8%
Volleyball (Court)	14.7%	43.4%	9.8%	32.1%
Cheerleading	13.9%	39.8%	7.2%	39.1%
Soccer (Indoor)	13.9%	40.0%	10.4%	35.7%
Ultimate Frisbee	12.3%	39.2%	13.7%	34.7%
Soccer (Outdoor)	11.8%	40.7%	8.4%	39.1%
Basketball	11.7%	38.8%	9.4%	40.1%
Volleyball (Sand/Beach)	10.1%	42.0%	11.5%	36.4%
Lacrosse	9.7%	52.0%	11.2%	27.1%
Paintball	9.7%	40.6%	13.7%	36.0%

Figure 15 - Sports Spending Levels (Source: Sports Marketing Survey's, USA)

3.6 Demographic Profile of Sports Travelers

The following graphs depict the demographic profile of sports travelers who traveled overnight to participate in and/or watch a sporting event in 2011.

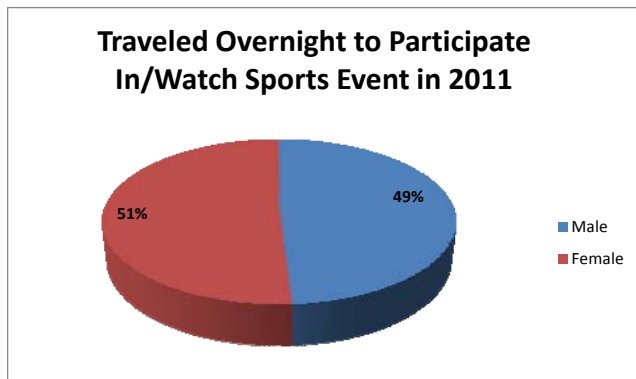


Figure 16 - Gender (Source: Sports Marketing Survey's, USA)

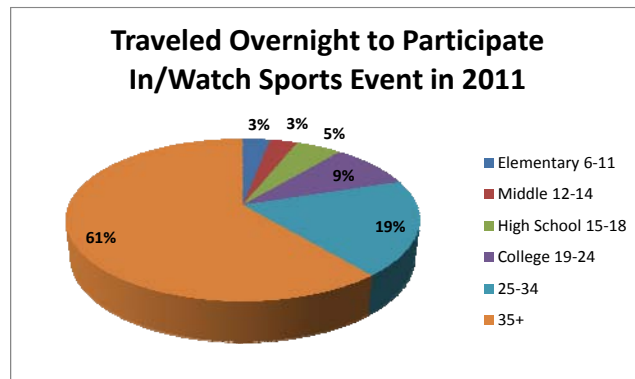


Figure 17 - Age (Source: Sports Marketing Survey's, USA)

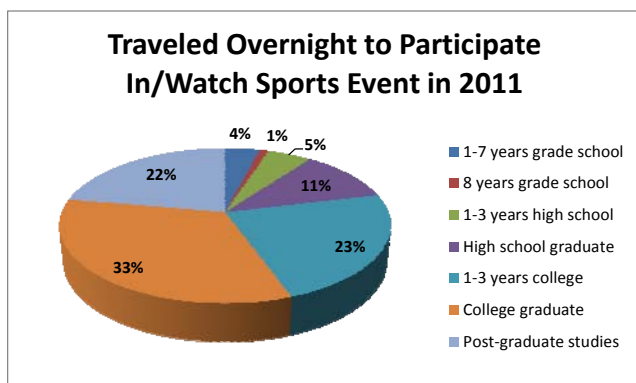


Figure 16 - Education (Source: Sports Marketing Surveys, USA)

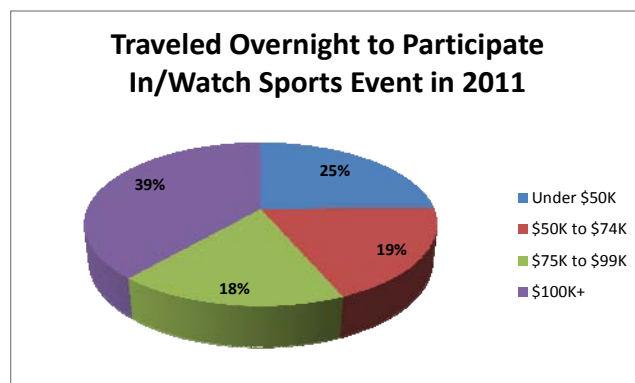


Figure 17 - HH Income (Source: Sports Marketing Surveys, USA)

3.7 Regional Sports Trend Analysis

The following sports were further examined to evaluate how Florida compares to the national trends in each specific sport.

- Softball (Fast Pitch)
- Baseball
- Soccer (Outdoor)
- Cheerleading
- Football (Flag)
- Lacrosse
- Rugby
- Volleyball (Court)
- Basketball

This information will help determine size of the market and frequency levels of users, as well as help determine the type of facilities that are most needed in a region, as well as the sports participation levels of the region. Florida is located in the South Atlantic Region, which also includes Georgia, South Carolina, North Carolina, Virginia, West Virginia, and Maryland.

The study is broken into categories for participation that identify:

- Total participation (1+ time / year)
- Casual participation
- Regular participation
- Frequent participation

Below are the findings of the study with detailed information located in Appendix A that includes participant level maps, as well as detailed tables.

- Softball (Fast Pitch)
 - The South Atlantic Region is below the national average in every category except for Frequent Participants (52+ times/year) which shows that Fast Pitch Softball for Select Teams is the highest in the U. S in terms of total number of participates and segment percentage of the population.
- Baseball
 - The South Atlantic Region is below the national average in every category.
- Soccer (Outdoor)
 - The South Atlantic Region is below the national average in every category except frequent participants (52+ times/year).
- Cheerleading
 - The South Atlantic Region is above the national average in every category except regular participants (26-51 times/year).
- Football (Flag)
 - The South Atlantic Region is above the national average in every category.

- Lacrosse
 - The South Atlantic Region is above the national average in every category except for Regular Participants (13-24 times/year). The region is second in total number of participants who play the game more than 25+times a year which is a growing select team sport for this region of the United States.
- Rugby
 - The South Atlantic Region is below the national average in every category except for Frequent Participants (15+ times/year) which indicate it is a growing sport in tournament type players at 93,000 in the South Atlantic area.
- Volleyball (Court)
 - The South Atlantic Region is below the national average in every category. This could be low due to a lack of venues available in the region or a lack of focus from sports organizers to market and promote the sport. In any case, the sport is growing in popularity for both men and women.
- Basketball
 - The South Atlantic Region is below the national average in every category except frequent participant (25+ times/year) which demonstrates a strong number of participants (over 2,665,000) that play team and tournament basketball.

From the data analyzed, it shows that there is a demand for sports in a multitude of sporting event types in the Florida market area based on the number of people who participate in these sports above the national average for frequency levels. This would include sports in soccer, lacrosse, rugby, football, basketball, volleyball, cheerleading, fast pitch softball, and baseball.

Section Four – Regional Competition Assessment

4.1 Overview

A market assessment was performed to identify the opportunities for a sports complex or facility to attract large, regional and multi-state events as an economic development project for Leon County.

4.2 Competition Analysis

A competition analysis for Leon County was analyzed from a local perspective and a regional (200-mile radius) perspective. Facilities with six or more fields that included baseball and softball fields and/or soccer/multi-purpose fields were analyzed. Facilities with 6 or more ball fields and/or soccer/multi-purpose fields generally draws a more advanced recreational and competitive market that is attracted to tournaments, instructional, and consumer preference orientations for the game they like to play. Also, the analysis looked at indoor facilities due to the large numbers of participants who play basketball, volleyball, cheerleading, indoor soccer, and wrestling. Lastly, ATV parks in the region were identified.

A competitor level ranking for each facility as a high, medium or low competitor to the Leon County area was determined. The ranking was established by location from Leon County, year the facility was built, improvements/renovations made, type of regional or national competitions held at the site, was it a public or private facility, and amenities offered. From this analysis, data was gathered to the extent it was available. A map was created showing the location of the competitors and their priority level ranking. **Figures 20-23** list similar facilities with their distance and location from Leon County and the amenities offered.

There are many factors desired that are important to sports groups wanting to attend a sport facility site. These include:

1. Demographic/economic characteristics
2. Recognizable identity of the sports venue in the sports industry
3. A well-designed, safe facility for participants and spectators with convenient access throughout the complex
4. Building program elements and supporting infrastructure that appropriately accommodates the desired market
5. Accessibility to and from the complex
6. Ability to efficiently host diverse events
7. Proximity to supporting amenities such as affordable accommodations, restaurants, retail and entertainment establishments
8. Quality of the competition and how well the host site manages the tournament and events.

Demographic, Trends and Market Analysis
Multi-Purpose Fields Sports Complex & Fieldhouse

Leon County, Florida

4.3 Competitive Site Assessments

Map Number	Facility Name	Address	Year Built	Acres/Sq.Ft.	Miles from Leon County	General Description of Facility	Other Notes
High Level Competitors							
1	The Taylor County Sports Complex	1684 N. US HWY 19 Perry, FL 32347	N/A	74	49.4 Miles, 1 Hr. 3 Mins.	4 Baseball Fields (2-330 ft. and 2-205 ft.), 6 Soccer Fields, 2 Basketball Courts, 2 Tennis Courts, 5 Shelters, 2 Playgrounds, Trails	The competition level would be high in soccer and baseball
2	Eagle Harbor Soccer Complex	4387 Lakeshore Drive Fleming Island, FL 32003	N/A	29	173 Miles, 2 Hrs. 53 Mins.	15 Soccer Fields, 1 Shelter, 1 Concession, 1 Playground, Accommodates Lacrosse	The number of fields indicated the capability to host very large tournaments for the region
3	Troy Sportsplex	601 Enzor Road Troy, AL 36079	built in 1991, added new fields in 1996, lights added to soccer fields in 2002, added trail in 2010	70	154 Miles, 3 Hrs.	4 Softball Fields, 4 Baseball Fields, 3 Soccer Fields, 8 Batting Cages, 2 Playgrounds, Trails	Hosted the 1995 and 1998 Dixie Boys World Series
4	South Commons Softball Complex	400 4th Street Columbus, GA 31901	1996	N/A	170 Miles, 3 Hrs. 12 Mins.	8 Softball Fields, 1 Shelter, 1 Concession	The complex has hosted dozens of local, state, regional, national and even international softball competitions
5	Woodruff Farm Soccer Complex	3151 Woodruff Farm Rd. Columbus, GA 31907	1993	65	172 Miles, 3 Hrs. 17 Mins.	12 Soccer Fields, 1 Concession	Hosted the Georgia State Select Cup and Recreational Cup for the last five years
6	Lynn Haven Sports Complex	2201 Recreation Drive Lynn Haven, FL, 32444	N/A	60	102 Miles, 2 Hrs.	6 Baseball/Softball Fields, 2 Multi-Purpose Fields, 3 Tennis Courts, 2 Concessions, 1 Mile Trail, 2 Playgrounds, 2 Pavilions	Part of the Panhandle Florida Birding Trail and can support a decent size tournament for the region
7	Tom Brown Sports Complex	1125 Easterwood Drive Tallahassee, FL 32311	N/A	297	3.3 Miles, 8 Mins.	8 Ball Fields/ Soccer Fields, 8 Tennis Courts, 4 Racquetball Courts, Disc Golf, Clubhouse, Concession, Accommodates Lacrosse	The host of many Tallahassee's special events,
8	Meadows Soccer Complex	701 Miller Landing Road Tallahassee, FL 32312	N/A	N/A	8.2 Miles, 18 Mins.	10 Soccer Fields	High competitor because of the number of fields it has and the type of play and user groups it attracts. User groups includes CSA (Capital Soccer Association), Parks, Recreation and Neighborhood Affairs Winter Soccer Recreation Program, TSA (Tallahassee Soccer Association), TOF (Top of Florida Soccer Club), TUFC (Tallahassee United Futbol Club), Warner Soccer
9	James Messer Sports Complex	2830 Jackson Bluff Road Tallahassee, FL 32304	N/A	56	7.1 Miles, 15 Mins.	11 Baseball/Softball Fields, Concession	The number of baseball/softball fields demonstrates that it can be a competitor but is centered on serving the local market as a priority first and it has hosted a regional Class B championship in 2010
10	Rotary Sportsplex	5220 SE Maricamp Road Ocala, FL 34474	Built in 1998, added 6 more fields later	80	187 Miles, 3 Hrs. 12 Mins.	11 Baseball Fields, 5 Soccer Fields	It has hosted the 10 and under Cal Ripken World Series in 2010 and host many state and regional baseball and soccer tournaments.

Figure 20 - Competition Assessment Matrix

**Demographic, Trends and Market Analysis
Multi-Purpose Fields Sports Complex & Fieldhouse**

Leon County, Florida

Map Number	Facility Name	Address	Year Built	Acres/Sq.Ft.	Miles from Leon County	General Description of Facility	Other Notes
High Level Competitors							
11	Frank Brown Park & Aquatic Center	16200 Panama City Beach Pkwy, Panama City Beach, FL 32413	Aquatic Center opened in 2006	200	120 Miles, 2 Hrs. 23 Mins	9 Softball/Baseball Field, 2 T-Ball Fields, 3 Soccer Fields, 4 Multi-Purpose Fields, 4 Tennis Courts, 2 Basketball Courts, Indoor Gymnasium, Playground, 1.5 Mile Trail, Aquatic Center, Accommodates Lacrosse	Hosts to many district, state and regional baseball and soccer tournaments and is close to beaches, shopping and hotels
12	Ashton Brosnaham Soccer Complex	10370 Ashton Brosnaham Dr. Pensacola, FL 32534	N/A	110	200 Miles, 3 Hrs. 14 Mins.	10 Regulation Size Soccer Fields, 4 Softball Fields, Pavilion, and Picnic Area, Accommodates Lacrosse	The site has hosted many state and national championships. The site has a lot of amenities that can accommodate other recreation activities as well for participants family members.
13	Nations Baseball Park	25325 SW 15th Ave Newberry, FL 32669	Opening Summer of 2012	40	141 Miles, 2 Hrs. 25 Mins	Phase 1 includes 16 Ball Fields, Phase 2 includes 16 more Ball Fields	Brand new facility opening in the summer of 2012
14	Westgate Park	501 Recreation Road, Dothan, AL 36301	N/A	N/A	101 Miles, 2 Hrs. 3 Mins.	5 Baseball Fields, 3 Regulation Size Soccer Fields, 1 Multi-Purpose Field, 1 Basefield Field for Mentally and Physically Challenged Children and Adults, Bike and Walking Trail, and Recreation Center, Accommodates Lacrosse	The site has hosted state tournaments for Girls Softball and Youth Dixie Baseball.
15	Rec Sportsplex (FSU)	3950 Tyson Road Tallahassee, FL 32310	N/A	104	9.3 Miles, 20 Mins.	12 Multi-Purpose Fields, 4 Tournament Multi-Purpose Fields, 5 Softball Diamonds, Accommodates Lacrosse	The site is located in Tallahassee. The site could become a major competitor if it was used for sports tournaments outside of the University use.
16	Riverside Motocross Park	Alabama 134 Newton, AL 36352	1994	N/A	114 Miles, 2 Hrs. 20 Mins.	1 Mile Track (22 ft. wide), Concessions	Site for the 2012 Wiregrass Motocross Championship and 2012 South Alabama Championship Series
Medium Level Competitors							
17	Bellevue Sportsplex	6501 SE 107 Street Bellevue, FL 34420	1991	87	192 Miles, 3 Hrs. 20 Mins	7 Baseball Fields, 6 Softball Fields, 1 Football Field, 2 Soccer Fields, 2 Tennis Courts, 2 Shelter, 2 Playground, 2 Basketball Courts	Designed primarily for the local community based on the number of fields types and the amount of different amenities
18	Ocala Regional Sportsplex	3500 SW 67th Avenue Ocala, FL 34474	N/A	80.5	184 Miles, 3 Hrs. 6 Mins.	5 Softball Fields, 2 Soccer Fields, 2 Basketball Courts, 2 Volleyball Courts, 3 Shelters, 1 Playground	Appears to support the local community needs based on the number and type of fields and courts available in the park with the exception of softball
19	Morgan Sports Center	4200 Indian Bayou Trail Destin, FL 32541	2000	42	163 Miles, 2 Hrs. 51 Mins.	4 Softball Fields, 2 Little League Fields, 3 Soccer Fields, 1 Basketball Court, 1 Volleyball Court, 2 Concession, 1 Playground	The Park appears to be based on the needs of the local community for adult softball which has been in a slow decline for participation over the last 15 years
20	Omega Park	4317 County Road Middleburg, FL 32068	N/A	16	165 Miles, 2 Hrs. 54 Mins.	7 Baseball Fields, 1 Softball Field, 1 Football Fields, 1 Concession	It would be a competitor for baseball but it appears to support the needs of the local community as its primary focus
21	Indian Trails Sports Complex	5455 Belle Terre Parkway Palm Coast, FL 32164	N/A	164	231 Miles, 3 Hrs. 48 Mins.	4 Baseball/Softball Fields, 4 Soccer Fields, 2 Shelter, 1 Concession, Accommodates Lacrosse	It appears to support the needs of the local community based on the types of fields located in the park
22	Ed Radice Sports Complex	14720 Radice Drive Tampa, FL 33626	2001	155	233 Miles, 4 Hrs. 34 Mins.	5 Baseball Fields, 5 Softball Fields, 9 Soccer Fields	Hosted several major soccer, baseball and softball national tournaments and multiple Florida High School Athletic Association (FHSA) State Championships

Figure 21 - Competition Assessment Matrix

Demographic, Trends and Market Analysis
Multi-Purpose Fields Sports Complex & Fieldhouse

Leon County, Florida

Map Number	Facility Name	Address	Year Built	Acres/Sq.Ft.	Miles from Leon County	General Description of Facility	Other Notes
Medium Level Competitors							
23	Lake Myrtle Sports Complex	2701 Lake Myrtle Park Rd. Auburndale, FL 33823	N/A	N/A	265 Miles, 4 Hrs. 37 Mins.	11 Soccer Fields, 5 Colligate Baseball Fields, 3 Little League Baseball Fields, 1 Senior League Baseball Field, Accommodates Lacrosse	The largest operator of collegiate baseball spring training tournaments, home of Florida Youth Soccer Association, and Headquarters for Florida Sports Hall of Fame
24	Donald R. Dizzy Stadium	Hull Road Gainesville, FL 32601	2009	N/A	148 Miles, 2 Hrs. 32 Mins.	2 Lacrosse Fields, 1 Soccer Field, Locker Rooms, Training Rooms, Concession Stand	It is part of the University which limits its use to outside events. It is single focused but would be a major competitor for women's lacrosse
25	Macon Soccer Club	4510 Raley Road Macon, GA 31206	N/A	N/A	187 Miles, 3 Hrs. 29 Mins.	10 Soccer Fields, Concessions	Appears to be single focused for soccer only
26	Mike E. Sansone Community Park	1702 North Park Road Plant City, FL 33563	1996, continually adding to	77	283 Miles, 4 Hrs. 36 Mins.	4 Youth Baseball Fields, 2 Youth Softball Fields, 3 League Size Baseball Fields, 1 Soccer Field, 6 Basketball Courts, 3 Sand Volleyball Courts, Skate Park, 4 Pavilions, 2 Playgrounds, 3 Concessions, Trail	Appears based on the number of different type of fields and amenities it was built more for a local use than regional and national use
27	Jacksonville Ice & Sportsplex	3605 Phillips Hwy. Jacksonville, FL 32207	1992	100,000 sq.ft.	164 Miles, 2 Hrs. 42 Mins.	5 Basketball/Volleyball Courts, 1 Multi-Purpose Field, Ice Rink, Pro-Shop, Concession Stand	The site has a good number of activities it provides but is limited to five basketball/volleyball courts and one indoor soccer field. This facility is more focused as a community facility than a tournament driven facility
28	Hard Rock Off-Road Park	6849 NW Gainesville Road Ocala, FL 34475	2009	100	174 Miles, 2 Hrs. 54 Mins.	6 Race Tracks, 3 Levels of Off-Road Trails, RV Camping Sites, Locker Rooms, Pro-Shop	host site to many off road championship series events but limited on competitions
29	Rolling Hills ATV Park	1083 Roaring Road Hartford, AL 36344	2005	60	119 Miles, 2 Hrs. 24 Mins.	MX Track, Mud Pit, ATV Trails, Camping Sites Available	Limited on competitions
30	Yellow Bluff ATV Park	121 Barclay Williams Road Rhine, GA 31077	2009	3,000	146 Miles, 2 Hrs. 52 Mins.	100 Miles of Trails, Camping Sites Available	Limited on competitions
31	Chase FasTrack Motorcross Park	1096 Sherman Road Cairo, GA 39828	N/A	N/A	31 Miles, 44 Mins.	1 Main Track, 1 Pee-Wee Track, Camping Site Available, Pro Shop, Concession Stand, Kids Playground	Limited on competitions
32	Georgia Practice Facility (GFP)	891 Bold Springs Road Cairo, GA 39828	2000	N/A	36 Miles, 39 Mins.	Motorcross Track, Supercross Track, Arenacrosse Track, Campsites, 6 Cabins, 2 Apartments, Recreation Room/Gym	The site is 36 miles away but is a practice facility site
Low Level Competitors							
33	Charles E. Bailey Sportsplex	1841 Sportplex Alexander City, AL 35011	N/A	212	232 Miles, 4 Hrs. 32 Mins.	5 Baseball Fields, 3 Softball Fields, 1 Football Field, 1 Soccer Field, 1 Shelter, 1 Playground, Trails	Based on the type of amenities and the number of amenities it looks to be built for community use
34	Baseball Soccer Complex	74 South Peachtree City, GA 30269	N/A	86	253 Miles, 4 Hrs. 38 Mins.	8 Baseball Fields, 6 Soccer Fields, 3 Concessions	The site is over 250 driving miles from Leon County
35	Orange Beach Sportsplex	4385 William Silvers pkwy. Orange Beach, AL 36561	2001, Phase II included additional fields, Fieldhouse, and press box	N/A	232 Miles, 4 Hrs. 4 Mins.	11 Softball/Baseball Fields, 2 Multi-Purpose Fields, 1 Soccer Field, 3 Concession Stands and 2 Locker Rooms	The site is over 200 miles from Leon County
36	David Whetstone Jr. Sports Complex	802 County Road 4 West Prattville, AL 36067	N/A	N/A	213 Miles, 4 Hrs. 11 Mins.	7 Baseball fields	Appears to be developed for a local community market and Home of the Dixie Youth and Dixie Majors Baseball League

Figure 22 - Competition Assessment Matrix

**Demographic, Trends and Market Analysis
Multi-Purpose Fields Sports Complex & Fieldhouse**

Leon County, Florida

Map Number	Facility Name	Address	Year Built	Acres/Sq.Ft.	Miles from Leon County	General Description of Facility	Other Notes
Low Level Competitors							
37	University of South Florida, Tampa Intramural Fields	4202 E Flower Avenue, Tampa, FL 33620	N/A	40	279 Miles, 4 Hrs. 35 Mins.	10 Multi-Use Fields, 3 Softball Fields, Accommodates Lacrosse	The site is not set up to host large regional and national tournaments
38	Ellis-Methvin Park	2099 E Cherry Street Plant City, FL 33563	2002, addition 5 soccer fields are planned for the future	46	284 Miles, 4 Hrs. 38 Mins.	4 Youth Fields (200 ft.), 3 Soccer Fields, 3 Shelters, Playground, Trails - Future Planning To Add 5 More Soccer Fields	The site is set up for serving the local market at this time
39	Otis M. Andrews Sports Complex	2602 East Cherry Street Plant City, FL 33563	N/A	39	284 Miles, 4 Hrs. 38 Mins.	8 Multi-Purpose Fields, Concessions, 2 Playgrounds, 2 Pavilions	The site is set up for local sports teams primarily
40	Plant City Stadium & Randy L. Larson Softball Complex	1500 South Park Road Plant City, FL 33563	1987, improvements made in 1996	75	285 Miles, 4 Hrs. 42 Mins.	5 Softball Fields	Hosted the annual Florida High School Softball Championships and various international and domestic competitions
41	McKey Park Tennis Center	112 Burton Ave Valadosta, GA 31602	N/A	15.5	85 Miles, 1 Hr. 48 Mins.	8 Tennis Courts, 2 Playgrounds, Volleyball Court, 2 Pavilions	Typically to host major regional and national tennis tournaments requires a minimum of 16 courts and ideally 22 courts for national tournaments
42	Wiregrass Park	620 Sixth Avenue Dothan, AL 36301	1993	N/A	97 Miles, 1 Hr. 57 Mins.	3 Girl's Softball Fields, Batting Cage 9 Tennis Courts, Outdoor Swimming Pool, 2 Meeting Rooms, Gymnasium, and 2 Meeting Rooms	The site appears to be developed for a local community need based on the number of amenities and types of facilities created on site
43	Pinellas Indoor Soccer Academy	611 Commerce Drive Largo, FL 33770	2008	20,000 sq.ft.	295 Miles, 5 Hrs.	2 Indoor Soccer Fields, 1 Outdoor Soccer Field, Batting Cages, Arcade Room, Bar & Concessions, Pro-Shop	Limited in size to host large events
44	East-Coast Off-Road Park	340 Cumberland Road, Hortense, GA 31543	2008	400	213 Miles, 3 Hrs. 45 Mins..	Miles of Tracks available for ATV's, Golf Carts, Dirt Bikes, Motorcycles, and Trucks	Site is over 200 miles from Leon County
45	The Great American Park	3935 US Highway 29 North Auburn, AL 36830	2009	160	201 Miles, 3 Hrs. 39 Mins.	4 ATV Tracks, 5 Mud Tracks, 6 Rock Tracks	Site to many local off road events
46	Big Creek Trail Ride	1396 Unadilla Highway Hawkinsville, GA 31036	2009	N/A	160 Miles, 3 Hrs.	Miles of Trails, Camping Sites Available, Concessions	Limited on competitions
47	The Muddhole	29971 County Road 112 Robertsedale, AL 36567	N/A	N/A	223 Miles, 3 Hrs. 41 Mins.	ATV Trails, Mud Pit	Limited on competitions
48	Pax Trax Cross Park	2529 North State Street Bunnell, FL 32110	1995	N/A	227 Miles, 3 Hrs. 43 Mins.	Full-Size Track, Pee-Wee Track, Restaurant, Parts Store, Camping Sites Available	Limited on competitions
49	North Florida Motocross	28422 Liberty Trail Hilliard, FL 32046	2007	N/A	180 Miles, 3 Hrs. 5 Mins.	Single Track, Concessions	Limited on competitions
50	Dirt Farm Off-Road MX Park	23943 GA HWY 121 Folkston, GA 31537	N/A	N/A	182 Miles, 3 Hrs. 9 Mins.	1 Main Track, 1 Youth Track, Camping Sites Available, Pro-Shop	Limited on competitions
51	AMX Park	3712 GA Highway 188 Cairo, GA 39828	N/A	N/A	35 Miles, 45 Mins.	1 Main Track, On-Site Mechanic	Limited on competitions

Figure 183 - Competition Assessment Matrix

4.4 Competitor Locations

There were thirteen (13) identified competitors within 100 mile radius of the Leon County location. The 13 competitors include:

- The Taylor County Sports Complex
- Lynn Haven Sports Complex
- Tom Brown Sports Complex
- Meadows Soccer Complex
- Frank Brown Park and Aquatic Center
- James Messer Sports Complex
- McKey Park Tennis Center
- Wiregrass Park, Westgate Park
- Rec Sportsplex (FSU)
- Chase FasTrackMotorcross Park
- AMX Park
- Georgia Practice Facility (GFP)

There were 17 identified competitors between the 100 – 150 mile radius and 21 competitors beyond the 150 mile radius. **Figure 24** shows location of the competitors, priority level, and displays radius rings of 100, 150, & 200 mile radius.

True indoor field house competitor facilities are those that can provide multi-sports in one facility (e.g. basketball, volleyball, wrestling, cheerleading, soccer, field hockey, lacrosse, football, etc.). It is understood that a facility of this type is being planned for Newberry, Florida near Gainesville. The field house at Disney World called World Wide of Sports Field House would be considered a low level competitor for Leon County. Although it is an internationally recognized facility, its affiliation with Disney ushers it into a world market rather than a regional one. Potential costs associated to use the Disney site provide motivation for participants within the target service area to utilize a more regional facility.

Field Houses are located within a 300 mile radius include the following:

- Jacksonville Florida: Ice and Sportsplex
- Pinellas: Indoor Soccer Academy
- Ellenton: Ice and Sports Complex
- Easton Newberry: Sports Complex-Archery and Gym Complex
- Cocoa Florida: Expo Sports Center
- Deerfield Beach Florida Indoor Sports Complex
- Orlando Florida Sports Center

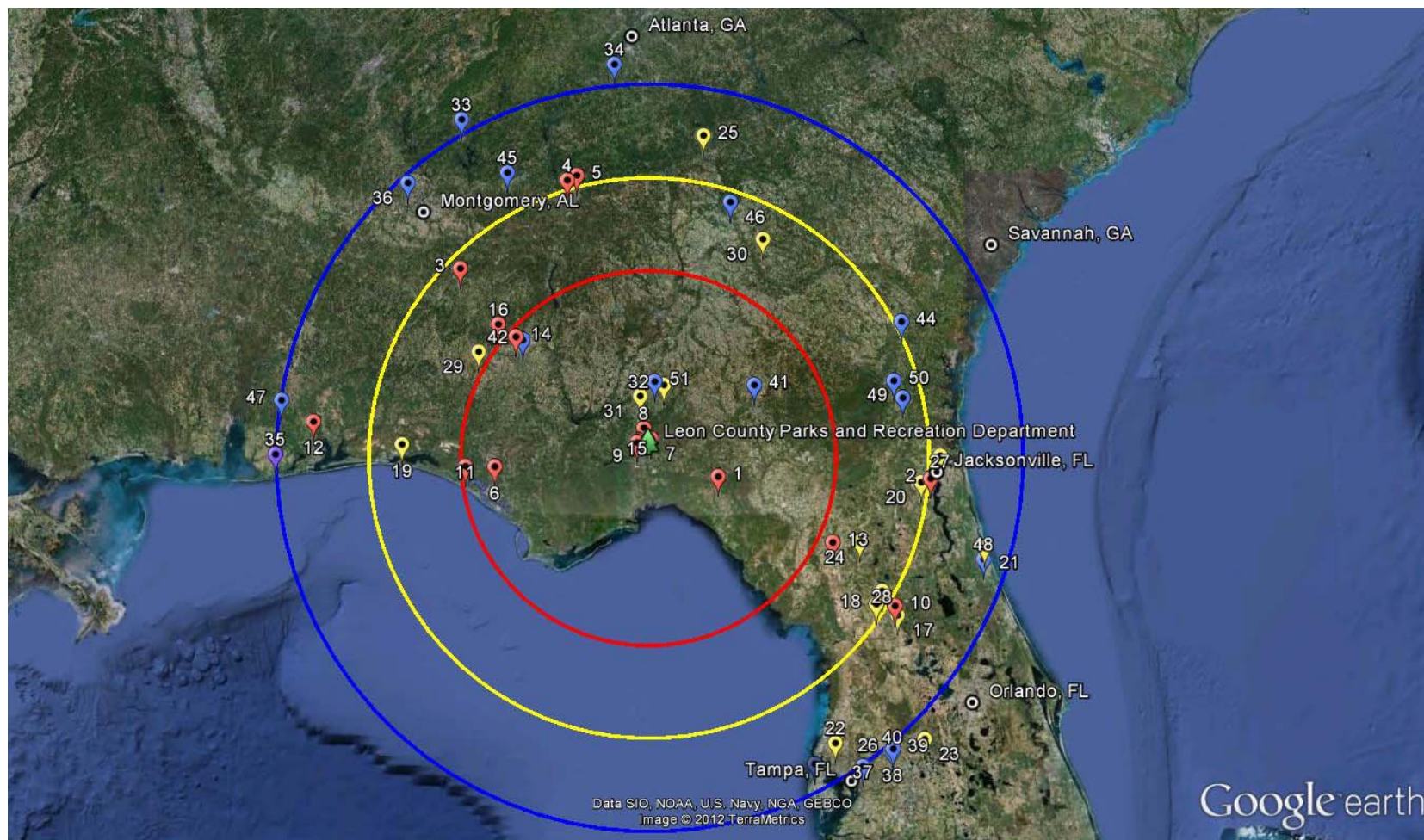


Figure 24 - Leon County Competition Assessment Showing 100, 150, & 200 Mile Radius

¹ Red Icon – High Level Competitor
Yellow Icon – Medium Level Competitor
Blue Icon – Low Level Competitor

4.5 Local Sport Facilities

Leon County currently offers multiple sports or entertainment facilities and venues. Leon County also offers 2 motorsports tracks, 8 equestrian facilities, over 20 landing sites, and an abundance of open space and greenways for residents and visitors to enjoy. The following matrix (**Figures 25 & 26**) is a list of facilities or parks and their amenities that are located within Leon County. A few of them were mentioned in the previous section as a strong competitor.

Several local facilities have the capability to enhance their economic value by making enhancement to their existing facilities. These include the Morcom Aquatic Complex, Apalachee Regional Park, Mike Long Track, and Forest Meadows Athletic Center. Morcom Aquatic Complex, owned by Florida State University, has a lack of seating so it cannot bring in additional events. Expansion and improvements to include permanent seating should be considered. Apalachee Regional Park hosts cross country meets and could bring in national events if the trail was wider to accommodate this level of competition. Trail widening and other improvements have recently been approved in the budget. Mike Long Track, also owned by Florida State University, needs more seating to host national events, and Forest Meadows hosts great tennis tournaments, but it needs to be enhanced, possibly adding a stadium court.

Appalachee Regional Park	7550 Apalachee Pkwy	4 Multi-Purpose Field (2 of them are lighted)
Canopy Oaks Community Park	3250 Point View Drive	2 Little League Baseball Fields (lighted), 2 Lighted Tennis Courts, Multi-Purpose Field (lighted), Concession, and Playground
Daniel B Charles Community Park	4768 Chaires Cross Road	4 Lighted Tennis Courts, 2 Basketball Courts, 2 Little League Baseball Fields (lighted), T-Ball Field (not lighted), and Concessions
Florida A&M University's (FAMU) Multipurpose Center/Teaching Gymnasium	1800 Wahnish Way	135,000 sq. ft. facility includes gymnasium, classrooms, dance studio, offices, banquet room, and kitchen
Forest Meadows Park & Athletic Center	4750 North Meridian Road	19 Lighted Tennis Courts (13 Clay and 6 Hard), 3 Indoor Racquetball Courts, 1 Indoor Squash Court, 2 Weight Rooms, Locker Rooms, and Spa
Fort Braden Community Park	Leon, FL	2 Little League Baseball fields (lighted), Multi-Purpose Field (lighted), and Concessions
J. Lewis Hall Sr., Woodville Park and Recreation Complex	1492 J Lewis Hall Sr Lane	4 Little League Baseball Fields (2 lighted), Junior League Baseball Field (lighted), Softball Field, Multi-Purpose Field (lighted), 2 Basketball Courts Playground, and Concessions
Jack L. McLean Park & Community Center	700 Paul Russell Road	4 Basketball Courts, 2 Tennis Courts, Disc Golf, 24 Station Fitness Trail, 2 Bike Trails, Playground, 2 Sand Volleyball Courts, 5 Shelters, Aquatic Center and a Recreation Center with Gymnasium, Weight Room, Multi-Purpose Rooms,
James Messer Sports Complex	2830 Jackson Bluff Road	11 Baseball/Softball Fields and Concession
Leach Student Recreation Center (FSU)	210 Bobby E. Leach Center	Gymnasium, indoor track, pool, spas, racquetball and squash courts, cardiovascular, strength, and free weight areas

Figure 25 - Local Facilities

**Demographic, Trends and Market Analysis
Multi-Purpose Fields Sports Complex & Fieldhouse**

Leon County, Florida

Name	Address	Amenities
Meadows Soccer Complex	701 Miller Landing Road	10 Soccer Fields
Miccosukee Community Park	Centerville, FL	Junior League Baseball Field, 2 Basketball Courts, Playground, Shelters, and Concessions
Morcom Aquatic Center (FSU)	Pottsdamer St	Main pool features up to 30 practice lanes, diving well features two one-meter and two three-meter springboards
Stoneler Road Park	Leon, FL	Little League Baseball Field (lighted), Shelter, and Playground
Tallahassee Leon County Civic Center	PO Box 10604	Multi-Purpose Convention and Entertainment Facility
TCC Lifetime Sports Complex	444 Appleyard Drive	3 Basketball Courts and multipurpose rooms
Tower Road Park	Leon, FL	Multi-Purpose Field (lighted), Playground and Shelter
Tom Brown Sports Complex	1125 Easterwood Drive	8 Ball Fields/ Soccer Fields, 8 Tennis Courts, 4 Racquetball Courts, Disc Golf, Clubhouse, and Concession
Trousdell Aquatic Center	298 John Knox Road	50 meter pool
Winthrop Park Tennis Center	1601 Mitchell Avenue	6 lighted hard courts, 2 outdoor racquetball courts

Figure 26 - Local Facilities

4.6 Competitors Pricing Levels

The following are examples of level of pricing from competitors.

4.6.1 Ocala Regional Sportsplex

- Cost Per Game(includes lining) \$100 + Tax
- Practice (no lining) \$25 + Tax
- Each Addition Game \$20 + Tax

* Fees include use of lights and restrooms

4.6.2 Taylor County Sports Complex

Football/Soccer

- Large Field – unlighted \$25/HR
- Large Field – lighted \$35/HR
- Small Field – unlighted \$15/HR
- Small Field – lighted \$25/HR

Baseball/Softball

- Large Field – unlighted \$30/HR
- Large Field – lighted \$40/HR
- Small Field – unlighted \$20/HR
- Small Field – lighted \$30/HR

4.6.3 Morgan Sports Center

Field Rentals (Non-Tournament)

Non-Profit Organizations

- Field Rental without lights \$15.45/HR
- Field Rental with lights \$20.60/HR
- Lining/Set-up \$15.45/each

Commercial

- Field Rental without lights \$30.90/HR
- Field Rental with lights \$36.05
- Lining/Set-up \$15.45

Field Rentals (Tournament Functions Up to 8 Hours)

Non-Profit

- One Field per day without lights \$77.25
 - Each Additional Field \$56.65
 - Each Additional Hour \$15.45
- Lights Per Hour Per Field \$10.30
- Additional Field Preparation Per Field \$15.45
- Gate Fee 15%
- Center Utilization Fee (Deposit) \$515.00

Commercial

- One Field per day without lights \$12.75
 - Each Additional Field \$77.25
 - Each Additional Hour \$25.75
- Lights Per Hour Per Field \$20.60
- Additional Field Preparation Per Field \$15.00
- Gate Fee 15%
- Center Utilization Fee (Deposit) \$1,545.00

Additional Administration Charges

- Personnel Cost for Hours Other Than Normal Hours of Operation (per hour per employee) \$15.45
- Holiday/Holiday Weekend (per hour per employee) \$25.75

4.6.4 Baseball Soccer Complexes

Civic, Church, School (Fayette County)

- Per Hour \$10.00
- Per Day \$50.00
- Per Hour – with lights \$20.00
- Per Day – with lights \$75.00

Peachtree City/Fayette County Residents

- Per Hour \$20.00
- Per Day \$75.00
- Per Hour – with lights \$30.00
- Per Day – with lights \$100.00

Peachtree City/Fayette County Commercial

- Per Hour \$25.00
- Per Day \$100.00
- Per Hour – with lights \$35.00
- Per Day – with lights \$125.00

Out of County Residents

- Per Hour \$30.00
- Per Day \$125.00
- Per Hour – with lights \$40.00
- Per Day – with lights \$150.00

Out of County Commercial

- Per Hour \$30.00
- Per Day \$125.00
- Per Hour – with lights \$40.00
- Per Day – with lights \$150.00

*Deposit required for all users \$50.00

4.6.5 Indian Trails Sports Complex

- \$25 (Rental to Conclude by 6PM)
- \$50 Security Deposit (Refundable 6-8 weeks)

4.6.6 Lynn Haven Sports Complex

Ball field Rentals (per day)

- Per field without lights \$50.00
- Per field with lights \$100.00
- Cleaning Fee \$50.00
- Cleaning Deposit (refundable) \$100.00
- Special Garbage Pickup/ Per Day \$4.00

4.6.7 Tom Brown Sports Complex & James Messer Sports Complex

Field Type

- Small Baseball Field
 - \$54.00 (up to 3 hours)
 - \$108.00 Daily
- Junior Baseball Field
 - \$54.00 (up to 3 hours) or
 - \$108.00 daily
- Senior Baseball Field
 - \$54.00 (up to 3 hours)
 - \$108.00 Daily
- Softball Field
 - \$54.00 (up to 3 hours)
 - \$108.00 Daily

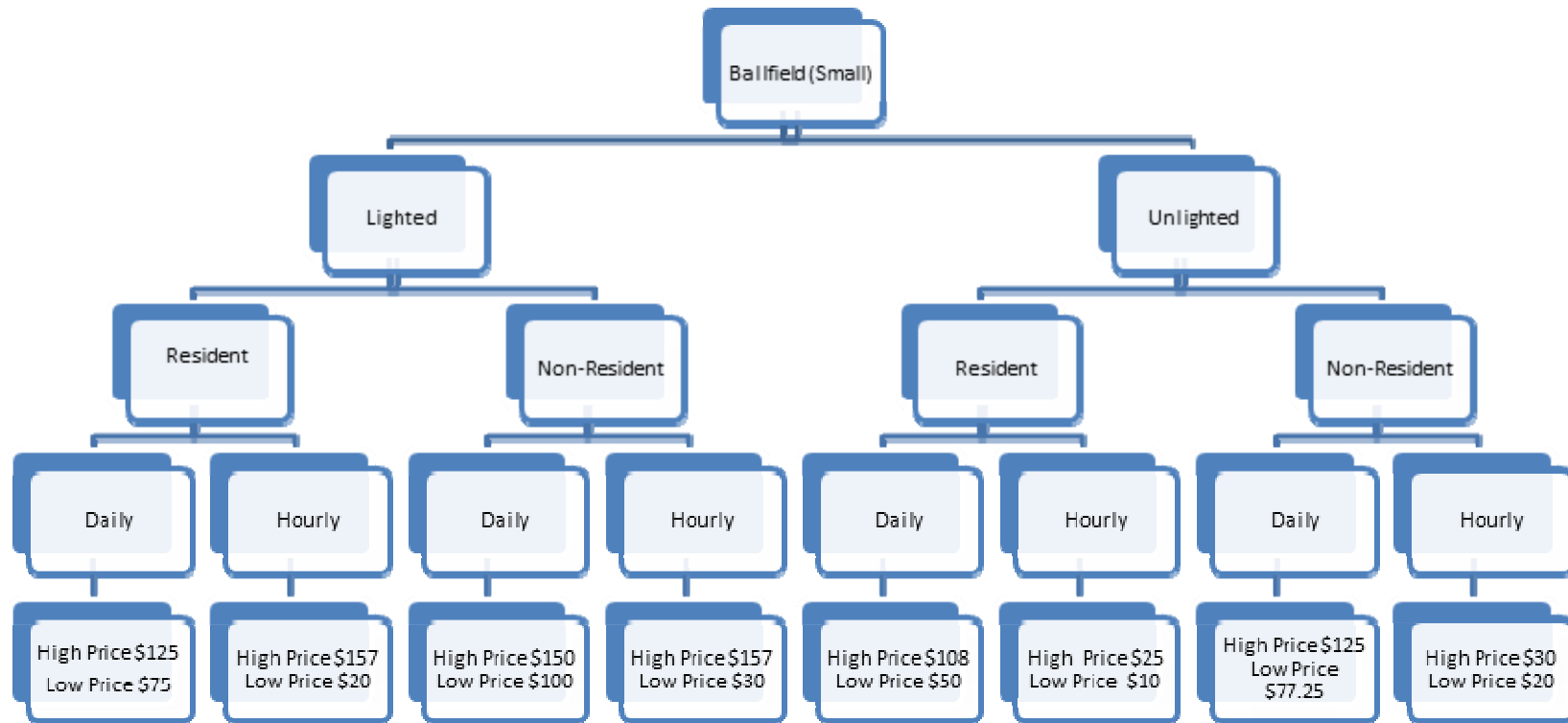
Light Fee

- Small Baseball Field
 - Light Fee First Hour \$21.50
 - Additional Hours \$11.00
- Junior Baseball Field
 - Light Fee First Hour \$43.25
 - Additional Hours \$21.50
- Senior Baseball Field
 - Light Fee First Hour \$139.75
 - Additional Hours \$43.25
- Softball Field
 - Light Fee First Hour \$32.50
 - Additional Hours \$11.00

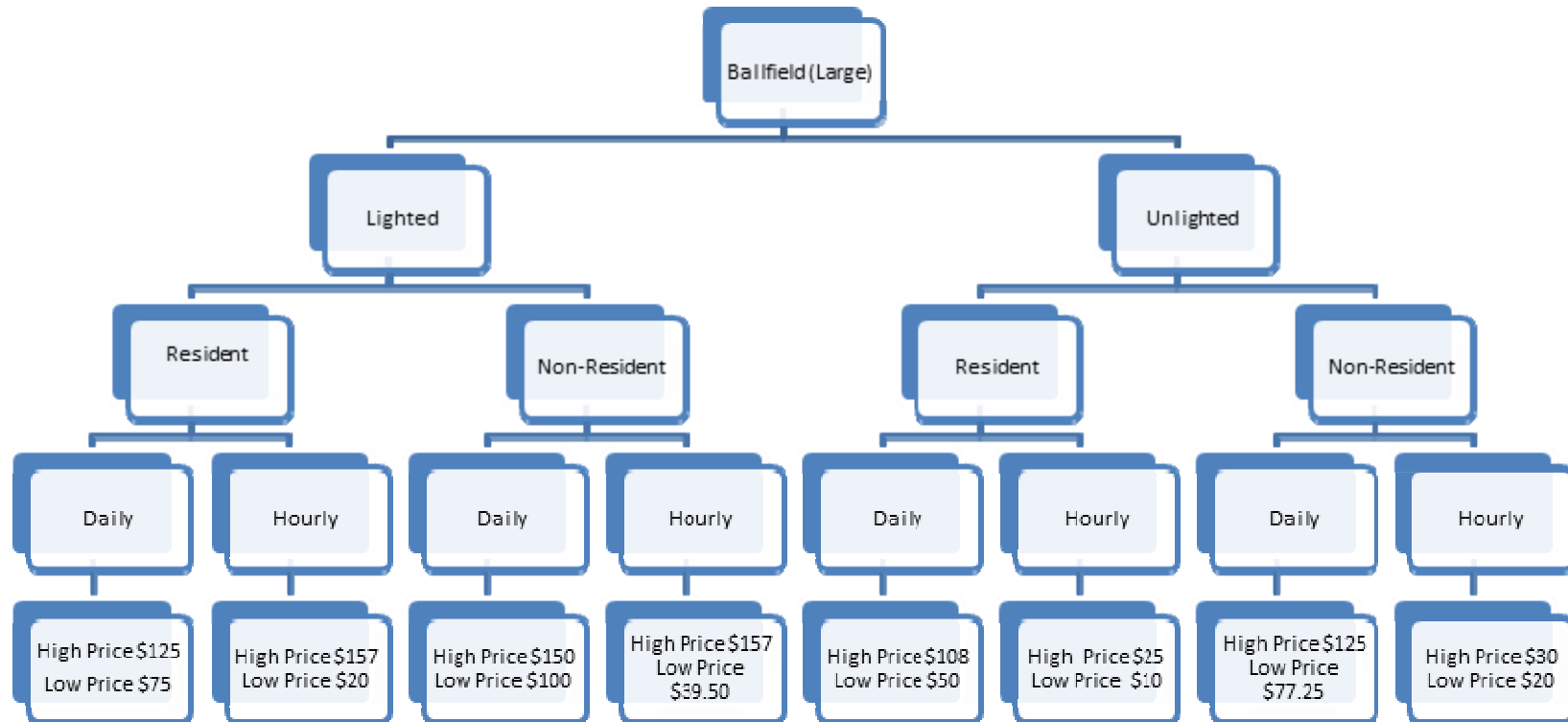
4.7 Pricing levels Flowchart

The Pricing Flow Chart helps to support the level of price elasticity in the Market Place when determining the amount of revenue a site can generate. The price information will be used in the proforma in development of the feasibility component.

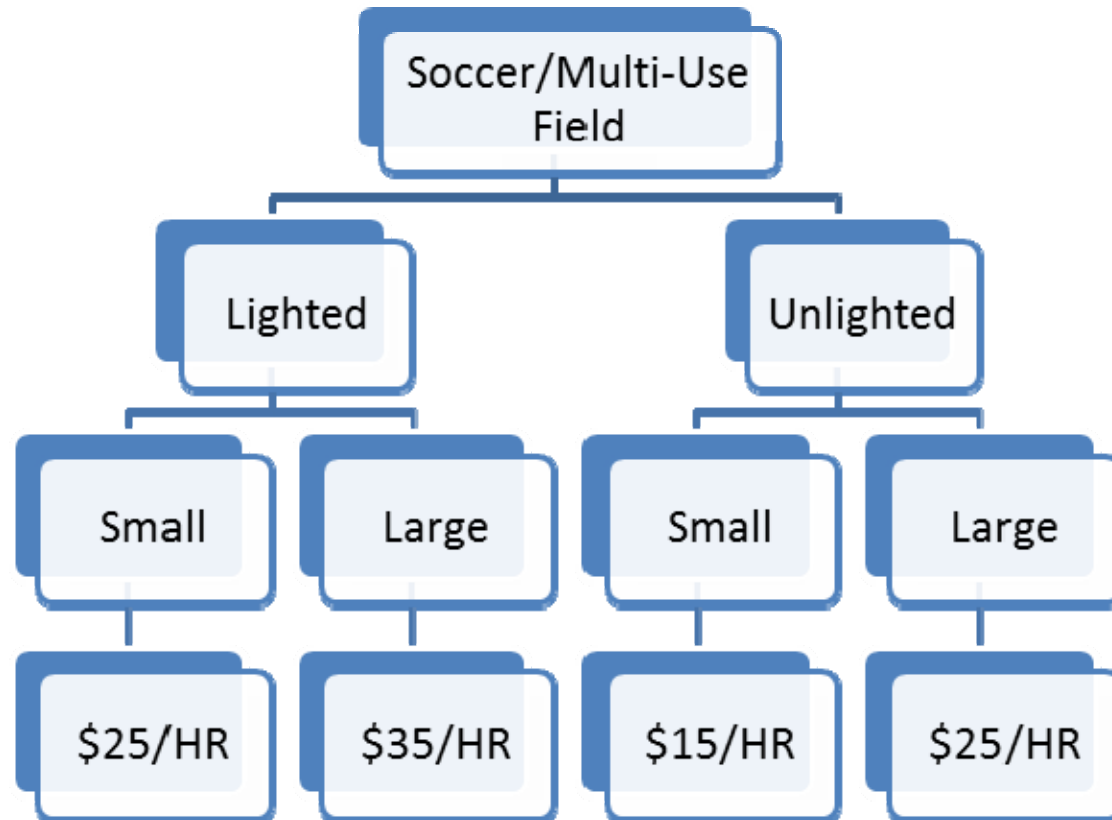
4.7.1 Ball field (Small)



4.7.2 Ballfield (Large)



4.7.3 Soccer/Multi-Use Field



4.8 Key Factors for Facility Recommendations in the Florida Market

The factors utilized to make recommendations on the type of facility to consider from the feasibility study are included in the following tables. Each table has an overall ranking which led to the recommendations for the types of facilities that Leon County should consider developing.

4.8.1 High Frequency

Each sport was ranked according to their participation growth levels and the frequency level.

Overall Ranking	High Growth	Mature	Slow Decline	High Decline
1. Lacrosse	218%			
2. Rugby	83.10%			
3. Tennis	45.70%			
4. ATV	Growth % Not Available			
5. Cheerleading	22.70%			
6. Volleyball	5.20%			
7. Soccer		2.70%		
8. Basketball		0.30%		
9. Gymnastics		-1.30%		
10. Baseball			-8.10%	
11. Softball (Fast Pitch)			-11.30%	
12. Softball (Slow Pitch)			-37.90%	
13. Football (Flag)				Decline % Not Available

4.8.2 Types of Sports Competitors in the Florida Market

The overall ranking is based on the size of the sports market and competitors in the 200 mile radius. These sports have the highest opportunity for sports tournaments and could be developed if facilities are developed to match the sports program need. The Low Level Competitor ranking indicates the sports that could be available for Leon County to capture on a regional level and would support the development of facilities to match these high growth sports programs.

The High Level Competitor ranking indicated there is a high level of competition in a saturated market that Leon County would have to compete with if facilities are developed specifically for these sports.

	High Level Competitor	Medium Level Competitor	Low Level Competitor
Basketball			X
Volleyball			X
Lacrosse			X
Rugby			X
Cheerleading			X
ATV			X
Softball (Fast Pitch)	X		
Gymnastics		X	
Baseball	X		
Soccer	X		
Tennis	X		
Football (Flag)			X

4.8.3 Participant per Day Spending

Participant spending indicates the sports spending by participants on a daily basis. This should be considered in the development of a sports venue and is important to the overall operational cost in developing and managing a sports complex for the County.

	High	Medium	Low
Baseball	X		
Soccer		X	
Lacrosse		X	
Basketball		X	
Volleyball	X		
Cheerleading	X		
Gymnastics	X		
Football (Flag)		X	
Rugby	X		
Softball (Fast Pitch)		X	
ATV		X	
Tennis		X	

4.9 Competition Characteristics That Support Leon County as an Attractive Location for Sporting Events

The following elements and components available in Leon County help to support attracting sport events to the County.

- Excellent interstate access to the county via I-10, I-75, and I-95
- Florida State University campus
- Variety of full service hotel accommodations and limited service hotel with a wide range of price points because of the University events that draw large spectators. Price points need to be between \$80-140 a night
- Variety of restaurants and retail areas available to participants and families of participants
- Access to a regional airport
- Established leisure and entertainment due to University and Alumni events held in the City and County
- Strong sports community in place
- A family friendly environment with high repeat visitors
- Year round climate
- Established recognition area of Florida

4.10 Highest Financial Return Characteristics and Attributes

The following components provided the highest return for the agencies developing sports facilities that are either indoor or outdoor.

4.10.1 Outdoor Facilities:

- 12 to 16 fields that are multi-functional in design that can accommodate Soccer, Field hockey, Lacrosse, Rugby, Ultimate Frisbee, and Football versus a single focused sports facility
- Spectator seating
- Lighted fields
- Concessions
- Quality restrooms
- On-site parking
- Warm-up areas
- Scoreboards
- Access to hotels and restaurants within 10 miles
- Shade
- Artificial turf that can stop rainout events when people travel a long distance
- Other amenities that children not playing in a tournament can access (i.e. water park / splash pad, shopping, playground)
- Good PA system
- Administrative Offices for Teams to connect, official changing rooms
- Easy access to the site
- Ample advertising and promotional opportunities

4.10.2 Indoor Facilities:

The facilities with the highest rate of return in dollars are as follows:

- Sports Field Houses – the philosophy of design is as follows:
 - Year round use, multifunctional sports and events can use the site such as basketball, indoor lacrosse, volleyball, gymnastics, cheerleading, wrestling, martial arts, indoor soccer and other events
 - Low cost to access and high volume of use
 - No threat of weather loss
 - High use by local residents in non-prime time times during the week
 - Ability to receive fair market price for programs and events on weekends
- 6 to 12 competitive basketball courts and 8 to 16 volleyball courts
- Able to accommodate two (2) indoor artificial turf soccer/lacrosse fields
- Spectator seating that is moveable
- High ceilings 30-60 ft.
- Unobstructed space
- Concessions
- Quality restrooms and locker rooms
- On-site parking
- Electronic scoreboards
- Administration and official rooms
- Quality PA System
- Able to conduct different sporting events in one setting
- Easy access to hotels and restaurants
- Other amenities that children of families can participate in

The following types of sports return the highest level of return to a community:

- Girls Fast Pitch Players– Two to three day events, players usually bring two parents and their siblings not involved in the tournament. Enjoy shopping before and after games. Spend on average \$127 per person per day
- Boys and Girls Soccer and Lacrosse– Usually a two to three day event. Girls spend more than boys and usually have three to four people with each player. Average \$110 per person per day
- Boys and Girls Basketball–Average two to three day event. Girls spend more than boys per day. Average spending per day per person is \$112
- Boy’s Baseball – Average two to three day event. Less teams due to the length of games. Average person spends \$97 per day
- Men’s and Women’s Softball–Average two to three days per event. Usually only with themselves or partner. Spend on average \$85 per person per day.
- Swimming – Users spend on average \$67 per person per day as they are typically one day events.

4.11 Types of Sports Facilities for Leon County to Consider

Based on the data reviewed from the sports trends, demographic analysis, competitor assessment, and the size of the sports market for various sports activities, it was recommended the following be considered for development based on the market and destination factors.

- Multi-functional outdoor sports complex that could serve soccer, lacrosse, field hockey, rugby, football and ultimate-frisbee should be considered in one facility setting. The complex should be in the 12-16 field size that can support these sports during prime seasons.
- Indoor Sports Field House that could support basketball, volleyball, indoor soccer, indoor lacrosse, wrestling, cheerleading, and martial arts. At minimum, the facility should include 10-12 basketball courts, 16 volleyball courts, 12 wrestling mats, 2 indoor soccer/lacrosse fields, and should be used for other non-sporting events during non-prime times.

4.11.1 Pros and Cons of Each Type of Facility

- **Multi-functional Outdoor Sports Complex**
 - *Pros*
 - Could serve multiple types of sports throughout the year
 - High levels of productivity and use of space based on the seasonality of each sport
 - Profitable if the quality of the facility is matched with strong management along with appropriate pricing of tournaments
 - Year-round use
 - Able to support local needs as well as competitive regional and national needs
 - High economic impact and value to the local community and County
 - *Cons*
 - Expensive to build
 - Expensive to operate as it needs be as pristine as possible
 - Requires an experienced facility manager and maintenance grounds staff
 - Requires marketing dollars to promote the site and the region
 - Requires a seven day a week facility operation to make it profitable and economically viable to Leon County
 - Some level of competition exists in the region (200 mile) for each specific sport that can be played at the complex

- **Indoor Sports Field House**

- *Pros*

- Year-round use
 - Can serve multiple types of sports in one setting
 - High revenue producing facility
 - High economic impact and value if marketed correctly and can attract the level of regional and national tournaments
 - Not many competitors in the market area
 - Ability to serve local sports needs during non-prime times
 - High level of productivity of sport spaces and use

- *Cons*

- Expensive to develop and build
 - Requires exceptional management of the facility and in hosting and managing events to keep teams and individuals coming back
 - Requires marketing and promotional dollars
 - Requires a good operating maintenance budget to keep the facility in good condition
 - Seven day a week operation to make it profitable

Section Five: Pro Forma Revenues & Expenditures

5.1 Leon County Multi-Purpose Fields Sports Complex Assumptions

1. Outdoor Sports Complex Assumptions

- 12 field multi-functional sports complex/full fields that can convert to smaller fields by age group and sport
- 80 acre site with fields taking up 30 acres and parking 5 acres the rest could be general use acres
- Half of the 12 fields could be all weather turf the other half grass. Turf fields could be rotated as needed
- Probable Cost for Multi-Purpose Fields Sports Complex: \$12,809,924.75 – \$19,072,168.50 depending on amenities
- Sports to be played on the fields: soccer (spring and fall), rugby (spring and summer), lacrosse (spring and summer) field hockey (fall)
- The goal is to host 30 tournaments per year in five years
- Fields could be used by clinics four (4) weeks out of the year primarily in the summer
- Showcase events could use the fields 3 weeks out of the year
- Local leagues Monday through Wednesday
- Local leagues could be contracted leagues
- The six (6) turf fields could be utilized at a rate of 10 hours of rest for each hour of use
- Artificial turf will not require rest periods

2. Outdoor Sports Complex Expenses

- Field maintenance cost on turf fields is \$18,000 per field to keep fields in top condition. This cost includes, water, fertilizer, over seeding, aeration, mowing, lining, utilities etc.
- Field maintenance costs of all-weather fields is \$4,000 per field for cleaning, cooling and updating
- Complex may require three (3) fulltime staff and four (4) seasonal staff for maintenance if the County manages the complex = \$263,275.08
- The Complex could be operated by the Division of Tourism Development/Visit Tallahassee for a percentage of gross at 20% per tournament
- Maintenance costs for other site areas could be approximately \$5,000 an acre for mowing, cleaning parking lots, trash removal, restroom cleaning, general repairs, total general use acres could be 45 acres of the 80 acres
- Maintenance start-up cost for equipment is \$250,000 for three (3) lightweight front mowers, three (3) gator utility vehicles, trash cans, edgers, weed trimmers, nets, line paint, aerators, seeders, fertilizer equipment, pick-ups, sprayers, rakes, trash bags, cleaning supplies, etc.
- Division of Tourism Development/Visit Tallahassee could host the tournaments and receive 20% of the gross to manage the tournaments
- Marketing costs could be funded by hotel / motel taxes and managed by the Division of Tourism Development/Visit Tallahassee at 5% of the operating budget for the Sports Complex
- The owner and operator may have to be responsible for insurance costs for regular operations

- Tournament sponsors and permit users could be required to provide proof of insurance for risk related to tournaments and permit operations. Most sports associations provide insurance for leagues and individuals as a part of their affiliation cost
- An assumption on official/referee cost was made at \$20 per hour. Confirmation in the local market was attempted through the Tallahassee Officials Association with no response. This cost is built into the proforma.
- Percent of revenue that could go to a contracted sports group tournament could be 70% of the gross

Total Expenses = \$1,417.171

3. Revenue Assumptions for the Outdoor Sports Complex

- Cost per team to participate in a tournament could be an average of \$400 a team for three games minimum per team. Pricing includes sports officials
- Field Rentals could be \$200 a field for a two hour time period minimum with 200 rentals a year= \$40,000
- Admissions for selected state championship events (3 per year) could be \$5 for an adult and \$3 per non-participating youth 18 and under \$14,000 (40 teams x 12 participants per team x 2.5 persons per participant x average of \$4 per person x 3 events a year = \$14,000 in admissions)
- Field sponsor could be \$500 a season with 50 sponsors for the complex= \$25,000
- Wi-Fi revenue could be \$20,000
- Concession revenue based on \$350,000 in gross revenue at 15% back could be \$52,500
- League fees could be \$500-\$800 for teams with an average of \$600 per team per season for a total of 500 teams or 250 per season in the sports of soccer, lacrosse, and rugby. 12 fields x 2 teams x 4 hours x 3 days =288 teams x \$600 a team per season (2) =\$345,600
- Team Fees for Tournaments could average \$400 per team with the average size tournament of 40 teams for soccer hosting (12 tournaments a year = \$192,000 in team fees), 32 teams for lacrosse per team (6 tournaments a year = \$76,000) and 16 teams for rugby (3 tournaments a year = \$19,000). 21 total tournaments a year between the sports with the average team paying \$400 per team = \$287,000 from team tournament fees. 70% of the Teams for external tournaments could be out of town teams.

Total Revenues = \$906,000

5.2 Leon County Fieldhouse Assumptions

1. Indoor Fieldhouse Assumptions

- The goal is to host 30 tournaments per year in five years
- 12 basketball courts that can be converted to 2 soccer/lacrosse fields, 16 volleyball courts, 10 wrestling mats, and 20 cheerleading court presentations areas. Portable floors, all weather turf, wrestling mats, volleyball standards and nets
- Probable cost for Indoor Fieldhouse: \$21,926,204.75 – \$28,504,774 depending on amenities
- Sports to be played include soccer, lacrosse, basketball, volleyball, wrestling, and cheerleading
- Concession facility area –privately managed for 15% of the gross
- 7,500 square foot cardio area
- Leased space to sports rehab business 2,500 square feet at \$11 a square foot
- Walking track – 1/10 of a mile
- Restrooms/changing rooms/locker rooms 4,000 square feet
- Square footage of the facility could be 80,000 square feet at \$225-\$250 a square foot to build including soft costs=\$18-\$22million
- The fieldhouse could be open 100 hours a week
- Portable Seating for a 1,000 people
- Administrative offices 2,500 square feet

2. Indoor Fieldhouse Expenses

- Utilities: \$4 a square foot
- Staffing costs: 4 fulltime staff, 12 seasonal/PT staff, 3 FT maintenance staff, volunteer staff:\$604,269
- Maintenance Endowment: \$1 from each player; \$20,000
- Events Management: 20% of Gross from each tournament
- Lease of cardio equipment: \$72,000 a year
- Supplies: \$25,000
- An assumption on official/referee cost was made at \$20 per hour. Confirmation in the local market was attempted through the Tallahassee Officials Association with no response. This cost is built into the proforma.
- Marketing costs: 5% of total operating budget
- Cleaning supplies: \$25,000
- Insurance is calculated at \$96,000 for activities in the building plus all the major sports associations have secondary insurance on their affiliated athletes as part of the Association fees when participating in sporting events

Total Expenses: \$1,421,875

3. Revenue Assumptions for the Indoor Fieldhouse

- Team Fees: Team fees are league fees from contracted leagues who will use the Fieldhouse during the off prime-times such as Monday-Thursdays; 2 seasons x 100 teams per season x \$600 a team = \$120,000. Team fees are calculated over two seasons because most sports have a prime season and non-prime season. Examples: Basketball Season Prime Time (November-March) Non-Prime Time is (April Through June); Volleyball Prime Time (September through December) Non-Prime time (March-May), Wrestling Prime Time is (November through March), non-prime time April through June; Cheerleading Prime Time is (November through March), Non-prime time is August through October;
- Tournament Fees: These are sports teams participating in Sports Tournaments: 16 tournaments between basketball and volleyball a year with an average of 32 teams a tournament x \$400 a team = \$204,800
- Two cheering leading events per year with 60 teams at \$390 per team or \$39 a person = \$23,400 x 2 = \$31,500
- Wrestling with two tournaments per year with 450 participants per tournament at \$35 per participant
- Team fees for tournaments could average \$400 per team with the average size tournament of 40 teams for soccer hosting (12 tournaments a year = \$192,000 in team fees), 32 teams for lacrosse per team (6 tournaments a year = \$76,000) and 16 teams for rugby (3 tournaments a year = \$19,000). 21 total tournaments a year between the sports with the average team paying \$400 per team = \$287,000 from team tournament fees. 70% of the teams for external tournaments could be out of town teams.
- Clinics: 4 basketball and volleyball clinics a year with 200 participants in each clinic x \$200 a week = \$160,000
- Showcases: 3 showcases for each sport a year. Total revenue \$15,000 a sport
- Rentals: 200 court rentals at \$75 an hour x 2 hour minimum = \$30,000
- Sponsorships: \$1,000 per court x 12 courts = \$12,000
- Advertising: \$25,000 for score boards, trash cans, information pieces, website
- Admissions: \$5 for state and national tournaments per spectator
- Fitness club fee: \$35 single a month, \$60 couple a month x 1,500 members at 60% of the membership being single and 40% being couple and families
- Lease from Rehab Center: \$12 a square foot at 3,000 square feet
- Concessions: \$600,000 gross x 15% of the gross = \$90,000
- Additional revenue that could be incorporated for the Field House could come from one time event sports tournaments such as ping pong tournaments or badminton tournaments but these revenues or costs were not incorporated into the proforma as this is speculative and it could require the operator to do greater research on these sports as to how large a market is available for tournaments such as these.
- As operators of the facility the County could expect to keep all of the fees for Tournaments they specifically develop for the site. If the County receives awards for regional and national tournaments they would get 85% of the gross from the Tournament event. The 15% goes to the governing body of the sport being played at the site. If the governing body is supplying the officials for the event the gross will go down to 50% for hosting the site.

Total Revenues = \$1,693,300

5.3 Operational Pro Forma

Table 1: Pro Forma Revenues & Expenditures Multi-Purpose Fields Sports Complex

Pro Forma Revenues & Expenditures						
LEON COUNTY MULTI-PURPOSE FIELDS SPORTS COMPLEX						
REVENUES AND EXPENDITURES						
	1th Year	2nd Year	3rd Year	4th Year	5th Year	6th Year
Revenues*						
External	\$539,900.00	\$556,097.00	\$572,779.91	\$589,963.31	\$607,662.21	\$625,892.07
Internal	\$366,100.00	\$377,083.00	\$388,395.49	\$400,047.35	\$412,048.78	\$424,410.24
Total Revenues	\$906,000.00	\$933,180.00	\$961,175.40	\$990,010.66	\$1,019,710.98	\$1,050,302.31
Expenditures	\$1,417,171.33	\$1,461,663.90	\$1,507,917.41	\$1,556,001.89	\$1,605,990.14	\$1,657,957.87
Net Revenues Over (Under)						
Expenditures	(\$511,171.33)	(\$528,483.90)	(\$546,742.01)	(\$565,991.22)	(\$586,279.15)	(\$607,655.56)
Total Cost Recovery	64%	64%	64%	64%	63%	63%
*NOTE: Revenues assume a full-time year of operations. First year revenues could be significantly less based on when during the fiscal year the facility starts operations, and the initial marketing and promotional efforts. PROS anticipates that the full potential revenues will be reached by the fifth year of operations.						

Table 2: Pro Forma Revenues & Expenditures Fieldhouse

Pro Forma Revenues & Expenditures						
LEON COUNTY FIELDHOUSE						
REVENUES AND EXPENDITURES						
	1th Year	2nd Year	3rd Year	4th Year	5th Year	6th Year
Revenues*						
External	\$601,300.00	\$619,339.00	\$657,056.75	\$717,983.65	\$808,096.92	\$936,805.81
Internal	\$1,092,000.00	\$1,124,760.00	\$1,193,257.88	\$1,303,905.11	\$1,467,556.69	\$1,701,300.42
Total Revenues	\$1,693,300.00	\$1,744,099.00	\$1,850,314.63	\$2,021,888.75	\$2,275,653.61	\$2,638,106.23
Expenditures	\$1,421,875.20	\$1,453,629.44	\$1,486,649.35	\$1,520,985.42	\$1,556,690.16	\$1,593,818.17
Net Revenues Over (Under)						
Expenditures	\$271,424.80	\$290,469.56	\$363,665.28	\$500,903.34	\$718,963.45	\$1,044,288.06
Total Cost Recovery	119%	120%	124%	133%	146%	166%
*NOTE: Revenues assume a full-time year of operations. First year revenues could be significantly less based on when during the fiscal year the facility starts operations, and the initial marketing and promotional efforts. PROS anticipates that the full potential revenues will be reached by the fifth year of operations.						

Operational Pro Forma

Leon County, Florida

Multi-Purpose Fields Sports Complex & Fieldhouse

Table 3: Multi-Purpose Sports Fields and Fieldhouse Revenue Model

Pro Forma Revenues & Expenditures						
LEON COUNTY MULTI-PURPOSE SPORTS FIELDS & FIELDHOUSE						
REVENUE MODEL						
DIVISION	ACCOUNT TITLE	PRICE	UNITS		REVENUES	EXPLANATION
			Sessions /	Participants		
			Events	/ Teams		
REVENUES						
Multi-Purpose Sports Fields	Tournaments-Soccer	\$500.00	12	48	\$288,000.00	Average \$500 per team with the average size tournament of 48 teams for soccer hosting 12 tournaments a year
Multi-Purpose Sports Fields	Tournaments-Lacrosse	\$500.00	32	6	\$96,000.00	32 teams for Lacrosse per team with 6 tournaments a year
Multi-Purpose Sports Fields	Tournaments-Rugby	\$500.00	16	3	\$24,000.00	16 teams for rugby 3 tournaments a year
Multi-Purpose Sports Fields	Event Admissions	\$4.00	3	1,200	\$14,400.00	Admissions for selected state championship events (3 a year) will be \$5 for an adult and \$3 dollars per non playing child (18 and under) - 40 teams x 12 kids per team x 2.5 persons per kid x average of \$4 dollars per person x 3 events a year
Multi-Purpose Sports Fields	Sponsorships	\$500.00	50	1	\$25,000.00	\$500 a season with 50 sponsors for the complex
Multi-Purpose Sports Fields	Wi-Fi Revenue	\$20,000.00	1	1	\$20,000.00	Wi-Fi revenue \$20,000
Multi-Purpose Sports Fields	Concessions	\$52,500.00	1	1	\$52,500.00	Concession revenue based on \$350,000 in gross revenue @15% commission
Multi-Purpose Sports Fields	Field Rentals - External	\$200.00	100	1	\$20,000.00	\$200 a field for a two hour time period minimum with 100 rentals a year
Multi-Purpose Sports Fields	League Fees	\$600.00	2	288	\$345,600.00	\$500-\$800 for teams with an average of \$600 per team per season for a total of 500 teams or 250 per season in the sports of soccer, lacrosse, and rugby. 12 fields x 2 team x 4 hours x 3 days =288 Teams x \$600 dollars a team per season (2)
Multi-Purpose Sports Fields	Field Rentals - Internal	\$200.00	100	1	\$20,000.00	\$200 a field for a two hour time period minimum with 100 rentals a year
Multi-Purpose Sports Fields	Miscellaneous Revenues	\$500.00	1	1	\$500.00	
TOTAL MULTIPURPOSE FIELD REVENUES					\$906,000.00	
DIVISION	ACCOUNT TITLE	PRICE	UNITS		REVENUES	EXPLANATION
			Sessions /	Participants		
			Events	/ Teams		
REVENUES						
Fieldhouse	Tournament Fees: basketball and volleyball	\$500.00	16	32	\$256,000.00	16 tournaments a year with an average of 32 teams a tournament x \$500 per team
Fieldhouse	Tournament Fees: Lacrosse	\$500.00	6	32	\$96,000.00	32 teams for Lacrosse per team (6 tournaments a year)
Fieldhouse	Tournament Fees: Rugby	\$500.00	3	16	\$24,000.00	16 teams for rugby (3 tournaments a year)
Fieldhouse	Tournament Fees: Wrestling	\$35.00	2	450	\$31,500.00	Wrestling with two tournaments per year with 450 participants per tournament at \$35 per participant
Fieldhouse	Cheering Leading Events	\$390.00	2	60	\$46,800.00	Two events a year with 60 teams
Fieldhouse	Showcases	\$2,500.00	6	1	\$15,000.00	Showcases-3 show cases for each sport a year
Fieldhouse	Concessions	\$90,000.00	1	1	\$90,000.00	\$600,000 gross x 15% of the gross
Fieldhouse	Sponsorships	\$1,000.00	12	1	\$12,000.00	\$1000 a court x 12 courts
Fieldhouse	Rentals - External	\$75.00	400	1	\$30,000.00	200 court rentals at \$75 dollars a hour x 2 hour minimum
Fieldhouse	Clinics	\$200.00	4	200	\$160,000.00	(4) basketball and volleyball clinics a year with 200 kids in each clinic x \$200 a week
Fieldhouse	Rentals - Internal	\$75.00	800	1	\$60,000.00	400 court rentals at \$75 dollars a hour x 2 hour minimum
Fieldhouse	Fitness Club - Single	\$35.00	12	900	\$378,000.00	\$35 single a month, \$60 couple a month x 1500 members @ 60% of the membership being single and 40% being couple and families.
Fieldhouse	Fitness Club - Couple	\$60.00	12	600	\$432,000.00	
Fieldhouse	Rehab Center Lease	\$12.00	3,000	1	\$36,000.00	\$12 a square foot at 3,000 square feet
Fieldhouse	Advertising	\$25,000.00	1	1	\$25,000.00	\$25,000 for score boards, trash cans, information pieces, web-site
Fieldhouse	Miscellaneous Revenues	\$1,000.00	1	1	\$1,000.00	
TOTAL FIELDHOUSE REVENUES AND PASSES					\$1,693,300.00	

Table 4: Multi-Purpose Sports Fields Expenses (1 of 3)

ACCOUNT TITLE	BUDGET	EXPLANATION
PERSONAL SERVICES		
Field Staff	\$150,000.00	3 FT, 1-\$60,000 2-\$45,000
Part Time	\$38,880.00	4 PT @ average \$13.50 for average 30 hrs/wk for 24 weeks
Overtime	\$5,000.00	
Employer's Share of FICA	\$12,330.77	6.36% of Salaries and Wages
Employer's Share of Medicare	\$2,814.31	1.49% of Salaries and Wages
Additional Full-Time Benefits	\$54,250.00	35% of Full Time Regular
Total	Personal Services	\$263,275.08
SUPPLIES		
Stationary & Printed Materials	\$0.00	
Office Supplies	\$500.00	
Gasoline	\$2,400.00	
Garage & Motor Supplies	\$1,200.00	
Repair Parts	\$1,200.00	
Small Tools & Minor Equip.	\$2,400.00	
Other Maint. Supplies	\$1,000.00	
Safety Supplies	\$4,000.00	First aid supplies for center
General Program Supplies	\$1,200.00	
Food & Beverages	\$0.00	
Retail Goods	\$0.00	
Other Miscellaneous	\$1,000.00	
Total	Supplies	\$14,900.00

Table 5: Multi-Purpose Sports Fields Expenses (2 of 3)

OTHER SERVICES & CHARGES		
Consulting Fees	\$0.00	
Medical Fees (Drug Tests)	\$2,000.00	Quarterly random screenings for all employees
Program Contractors		
Info Sys Maint/Contracts	\$1,200.00	Phone and IT system support
Criminal Background Checks	\$0.00	
Marketing & Promotions	\$66,531.97	5% of other expenditures
Security Services	\$1,200.00	Alarm monitoring
Catering Services	\$0.00	
Other Professional Fees	\$0.00	
Postage	\$0.00	
Newsletter Postage	\$0.00	
Travel Fees & Expenses		
Training Travel & Lodging	\$4,500.00	
Travel Per Diem	\$0.00	
Telephone Line Charges	\$0.00	
Cellular Phone Fees	\$1,000.00	Overage charges for use of personal cell phones
Printing (Not Office Supplies)	\$0.00	
General Insurance	\$54,000.00	
Events Maintenance	\$81,600.00	20% of Tournament Revenues
Officials	\$40,000.00	\$20 for 2,000 hours
Electricity	\$300,000.00	12 fields X \$25,000
Water & Sewer	\$100,000.00	4 mon X \$500 X 50 acres
Gas	\$0.00	
Cable Service	\$1,800.00	
Equipment Repairs & Maint.		
Field Maintenance	\$108,000.00	\$18,000 per engineered field
Field Maintenance	\$24,000.00	\$4,000 per all-weather field
General Area Maintenance	\$225,000.00	\$5,000/acre for 45 acres
Trash Collection	\$3,000.00	\$250 / Mon Dumpster
Other Cont. Services		
Auto Repair & Maintenance		
Equipment Maint. Contract		
Software Maint. Contracts	\$0.00	
Copier	\$10,000.00	
Other Rental & Leases	\$1,200.00	Water coolers
Subscriptions	\$120.00	
Organization & Membership Dues	\$1,000.00	
Staff Clothing	\$3,400.00	17 @ \$200 ea.
Participant Clothing	\$5,000.00	
Irrigation Materials	\$12,000.00	
Repair Parts	\$10,000.00	Plumbing, Hardware, Electrical, Lighting, etc...
Small Tools & Minor Equip.	\$5,000.00	Misc. and Specialty Tools
Other Maint. Supplies	\$12,000.00	Lubricants, light bulbs, etc.
Safety Supplies	\$1,500.00	Safety Glasses, Gloves, Harness, etc...
Internal Instruction Fees	\$2,500.00	Customer service training, CPR/First Aid/AED training
External Instructional Fees	\$2,000.00	
Other Fees & Licenses	\$2,730.00	ASCAP license for music (\$730), CPR/First Aid/AED certifications (\$8x250)
Refunds, Awards & Indemnities	\$0.00	
Special Projects	\$1,000.00	Staff morale/incentives
Sales Tax Paid	\$0.00	
Total	Other Services	\$1,083,281.97

Table 6: Multi-Purpose Sports Fields Expenses (3 of 3)

CAPITAL OUTLAY		
Furniture & Fixtures	\$0.00	
Computer Equipment	\$0.00	
Software	\$0.00	
Parks Equipment	\$35,714.29	Annual Replacement Costs
Office Equipment	\$0.00	
Total	Capital Outlay	\$35,714.29
TRANSFERS		
Maintenance/Replacement Endowment Fund	\$20,000.00	\$1.00 per Participant - Estimated 20,000 participants
	\$0.00	
Total	Transfers	\$20,000.00
TOTAL EXPENSES		\$1,417,171.33
NET REVENUE/(LOSS)		(\$511,171.33)
cost recovery**		63.9%

Table 7: Fieldhouse Expenses (1 of 3)

ACCOUNT TITLE	BUDGET	EXPLANATION
PERSONAL SERVICES		
Fieldhouse Staff	\$195,000.00	4 FT, 1-\$60,000 3-\$45,000
Maintenance Staff	\$135,000.00	3 FT @ \$45,000
Part Time	\$116,640.00	12 PT @ average \$13.50 for average 30 hrs/wk for 24 weeks
Overtime	\$5,000.00	
Employer's Share of FICA	\$28,724.30	6.36% of Salaries and Wages
Employer's Share of Medicare	\$6,654.94	1.49% of Salaries and Wages
Additional Full-Time Benefits	\$117,250.00	35% of Full Time Regular
Total	Personal Services	\$604,269.24
SUPPLIES		
Stationary & Printed Materials	\$0.00	Business cards, stationary, envelopes, cards
Office Supplies	\$10,000.00	
Safety Supplies	\$4,000.00	First aid supplies for center
Other Miscellaneous	\$1,000.00	
Total	Supplies	\$15,000.00

Table 8: Fieldhouse Expenses (2 of 3)

OTHER SERVICES & CHARGES		
Consulting Fees	\$0.00	
Medical Fees (Drug Tests)	\$3,000.00	Quarterly random screenings for all employees
Info Sys Maint/Contracts	\$7,500.00	Phone and IT system support
Criminal Background Checks	\$0.00	
Marketing & Promotions	\$66,755.96	5% of other expenditures
Security Services	\$2,400.00	Alarm monitoring
Catering Services	\$0.00	
Other Professional Fees	\$0.00	
Postage	\$4,000.00	
Newsletter Postage	\$0.00	
Training Travel & Lodging	\$4,500.00	
Travel Per Diem	\$0.00	
Telephone Line Charges	\$0.00	
Cellular Phone Fees	\$1,000.00	Overage charges for use of personal cell phones
Printing (Not Office Supplies)	\$0.00	
Classified Advertising	\$0.00	
General Insurance	\$96,000.00	
Events Maintenance	\$51,200.00	20% of Tournament Revenues
Officials	\$40,000.00	\$20 for 2,000 hours
Cardio Equipment Lease	\$72,000.00	30 Stations at \$200 / month
Electricity	\$320,000.00	\$4.00 / SF
Water & Sewer	\$20,000.00	\$.25 /SF
Gas	\$20,000.00	\$1 /SF 3 months
Cable Service	\$1,800.00	
Trash Collection	\$3,000.00	\$250 / Mon Dumpster
Software Maint. Contracts	\$0.00	
Copier	\$10,000.00	
Other Rental & Leases	\$1,200.00	Water coolers
Subscriptions	\$120.00	
Organization & Membership Dues	\$1,000.00	
Staff Clothing	\$3,400.00	17 @ \$200 ea.
Participant Clothing	\$5,000.00	
Building Materials	\$12,000.00	Paint, Lumber, Nails, Screws, Glues, etc...
Repair Parts	\$10,000.00	Plumbing, Hardware, Electrical, Lighting, etc...
Small Tools & Minor Equip.	\$5,000.00	Misc. and Specialty Tools
Other Maint. Supplies	\$12,000.00	Lubricants, light bulbs, etc.
Safety Supplies	\$1,500.00	Safety Glasses, Gloves, Harness, etc...
Internal Instruction Fees	\$2,500.00	Customer service training, CPR/First Aid/AED training
External Instructional Fees	\$2,000.00	
Other Fees & Licenses	\$2,730.00	ASCAP license for music (\$730), CPR/First Aid/AED certifications (\$8x250)
Refunds, Awards & Indemnities	\$0.00	
Special Projects	\$1,000.00	Staff morale/incentives
Sales Tax Paid	\$0.00	
Total	Other Services	\$782,605.96

Table 9: Fieldhouse Expenses (3 of 3)

CAPITAL OUTLAY		
Furniture & Fixtures		\$0.00
Computer Equipment		\$0.00
Software		\$0.00
Office Equipment		\$0.00
Total	Capital Outlay	\$0.00
TRANSFERS		
Maintenance/Replacement Endowment Fund	\$20,000.00	\$1.00 per Participant - Estimated 20,000 participants
	\$0.00	
Total	Transfers	\$20,000.00
TOTAL EXPENSES		\$1,421,875.20
NET REVENUE/(LOSS)		
		\$271,424.80
cost recovery**		119.1%

Table 10: Multi-Purpose Sports Fields Revenues & Expenditures Projections

Pro Forma Revenues & Expenditures				
LEON COUNTY MULTI-PURPOSE SPORTS FIELDS				
REVENUES AND EXPENDITURES				
SERVICE TITLE	Revenues	Expenditures	Revenues Over (Under) Expenditures	Cost Recovery - Percent
Multi-Purpose Fields	\$906,000.00	\$1,417,171.33	(\$511,171.33)	64%
Total	\$906,000.00	\$1,417,171.33	(\$511,171.33)	64%
SERVICE TITLE	Revenues	Expenditures	Revenues Over (Under) Expenditures	Cost Recovery - Percent
Replacement Endowment	\$20,000.00	\$0.00	\$20,000.00	N/A
Total	\$20,000.00	\$0.00	\$20,000.00	N/A

Table 11: Fieldhouse Revenues & Expenditures Projections

Pro Forma Revenues & Expenditures				
LEON COUNTY FIELDHOUSE				
REVENUES AND EXPENDITURES				
SERVICE TITLE	Revenues	Expenditures	Revenues Over (Under) Expenditures	Cost Recovery - Percent
Fieldhouse	\$1,693,300.00	\$1,421,875.20	\$271,424.80	119%
Total	\$1,693,300.00	\$1,421,875.20	\$271,424.80	119%
SERVICE TITLE	Revenues	Expenditures	Revenues Over (Under) Expenditures	Cost Recovery - Percent
Replacement Endowment	\$20,000.00	\$0.00	\$20,000.00	N/A
Total	\$20,000.00	\$0.00	\$20,000.00	N/A

The following construction cost information is being provided as a preliminary opinion of probable construction cost and is based on a variety of sources including historic cost data, Means cost data and gathered information from suppliers and contractors. Site construction costs and land sales will need to be adjusted following site selection and further evaluation of existing conditions. All estimate information is subject to change. The cost data referring specifically to the indoor facility as indicated in the following tables has been updated to reflect various prototypical site conditions (urban and suburban typical conditions) and can be found in Section 7.11.

Table 12: Summary of Budgetary Opinion of Probable Cost

DESCRIPTION	TOTAL	
	LOW	HIGH
	COST RANGE	
I. Multi Purpose Fields Sports Complex		
A. Site Preparation Subtotal	\$3,098,600.00	\$5,705,000.00
B. Drainage & Utilities	\$642,400.00	\$961,400.00
C. Hardscape & Amenities	\$217,000.00	\$338,000.00
D. Multi Purpose Field Items	\$5,098,500.00	\$5,598,000.00
E. Landscape	\$695,065.00	\$1,057,110.00
F. Structures	\$1,387,500.00	\$1,725,000.00
G. Land Costs	\$0.00	\$1,200,000.00
Multi Purpose Fields Sports Complex Subtotal:	\$11,139,065.00	\$16,584,510.00
15% Contingency	\$1,670,859.75	\$2,487,676.50
Multi Purpose Fields Sports Complex Total:	\$12,809,924.75	\$19,072,186.50
II. Fieldhouse		
A. Site Preparation Subtotal	\$527,550.00	\$996,250.00
B. Drainage & Utilities	\$260,400.00	\$393,150.00
C. Hardscape & Amenities	\$232,000.00	\$329,000.00
D. Landscape	\$46,315.00	\$68,360.00
E. Structures	\$18,000,000.00	\$22,000,000.00
G. Land Costs	\$0.00	\$1,000,000.00
Fieldhouse Subtotal:	\$19,066,265.00	\$24,786,760.00
15% Contingency	\$2,859,939.75	\$3,718,014.00
Fieldhouse Total:	\$21,926,204.75	\$28,504,774.00

NOTES:

1. The estimate is subject to change based on actual site conditions.
2. Estimates for construction do not include soft costs such as consultant fees, market studies, surveying, testing, etc.
3. Materials identified in estimate are intended for pricing purposes only. Materials may be substituted as the design develops. Structures estimate includes FFE.
4. This estimate does not include any required permitting fees, construction/contract administration fees, general conditions, or the cost of various bonds that may be required in the construction contract.
5. Estimate has been assembled using in house, supplier, Client provided costs, and Means cost data. Contractor pricing may vary as we suddenly due to unforeseen elements/conditions.
6. Estimate does not include the cost of land purchase or lease.

Operational Pro Forma

Leon County, Florida

Multi-Purpose Fields Sports Complex & Fieldhouse

**Table 13: Budgetary Opinion of Probable Cost – Multi-Purpose Fields Sports Complex -12 Fields
(Future Expansion to 16 Fields)**

DESCRIPTION	QUANT.	UNIT	UNIT		TOTAL		
			LOW-MODERATE PRICE RANGE	MODERATE-HIGH	LOW-MODERATE COST RANGE	MODERATE-HIGH	
A. Site Preparation and Earthwork							
1 Fine Grading	46.00	AC	\$8,500.00	\$10,000.00	\$391,000.00	\$460,000.00	
2 Mass Grading	300000.00	CY	\$8.00	\$16.00	\$2,400,000.00	\$4,800,000.00	
3 Erosion Control	46.00	AC	\$5,600.00	\$7,500.00	\$257,600.00	\$345,000.00	
4 Mobilization	1	SITE	\$50,000.00	\$100,000.00	\$50,000.00	\$100,000.00	
Site Preparation and Earthwork Subtotal:					\$3,098,600.00	\$5,705,000.00	
B. Drainage & Utilities							
1 Storm Drainage (Pond)	1	LS	\$500,000.00	\$750,000.00	\$500,000.00	\$750,000.00	
2 Water Line Extension	500	LF	\$34.00	\$45.00	\$17,000.00	\$22,500.00	
3 Irrigation Well and Pump Station	1	LS	\$70,000.00	\$100,000.00	\$70,000.00	\$100,000.00	
4 Fire Hydrant	1	EA	\$4,000.00	\$5,500.00	\$4,000.00	\$5,500.00	
5 Sanitary Extension	500	LF	\$30.00	\$50.00	\$15,000.00	\$25,000.00	
6 Underground PWR/CATV/TELECO	1	LS	\$10,000.00	\$20,000.00	\$10,000.00	\$20,000.00	
7 Outdoor Lighting (Pedestrian poles)	12	EA	\$2,200.00	\$3,200.00	\$26,400.00	\$38,400.00	
Drainage & Utilities Subtotal:					\$642,400.00	\$961,400.00	
C. Hardscape & Amenities							
1 Parking Lot	150	SP	\$1,100.00	\$1,500.00	\$165,000.00	\$225,000.00	
2 4" Concrete Walks	8,000	SF	\$4.00	\$6.00	\$32,000.00	\$48,000.00	
3 Picnic Tables	10	EA	\$1,000.00	\$1,500.00	\$10,000.00	\$15,000.00	
4 Shade Structure	10	LS	\$1,000.00	\$5,000.00	\$10,000.00	\$50,000.00	
5 Benches	6	LS	\$1,000.00	\$2,000.00	\$6,000.00	\$12,000.00	
6 Trash Receptacles	6	LS	\$1,000.00	\$2,000.00	\$6,000.00	\$12,000.00	
Hardscape & Amenities Subtotal:					\$217,000.00	\$338,000.00	
D. Multipurpose Field Items							
1 Artificial Turf - 6 fields only (stone, subdrainage, curb, fabric, filler, etc.)	550,000	SF	\$5.75	\$6.00	\$3,162,500.00	\$3,300,000.00	
2 Bleachers	32	EA	\$5,000.00	\$8,000.00	\$160,000.00	\$256,000.00	
3 Goal Posts (Soccer and Lacross)	12	PR	\$4,000.00	\$6,000.00	\$48,000.00	\$72,000.00	
4 Sports Field Lighting	1	LS	\$1,600,000.00	\$1,800,000.00	\$1,600,000.00	\$1,800,000.00	
5 Scoreboard	8	LS	\$15,000.00	\$20,000.00	\$120,000.00	\$160,000.00	
6 PA System	1	LS	\$8,000.00	\$10,000.00	\$8,000.00	\$10,000.00	
Multipurpose Field Items Subtotal:					\$5,098,500.00	\$5,598,000.00	
E. Landscape							
1 Palms	12	EA	\$350.00	\$500.00	\$4,200.00	\$6,000.00	
2 Large Tree	10	EA	\$250.00	\$350.00	\$2,500.00	\$3,500.00	
3 Ornamental Trees / Lg Shrubs	15	EA	\$225.00	\$300.00	\$3,375.00	\$4,500.00	
4 Small Shrub + Ground Cover 3 gal	10,000	SF	\$3.00	\$4.50	\$30,000.00	\$45,000.00	
5 Sod	25,000	SF	\$0.25	\$0.45	\$6,250.00	\$11,250.00	
6 Sportsfield Turf	550,000	SF	\$0.35	\$0.55	\$192,500.00	\$302,500.00	
7 Mulch (Pinestraw)	12,000	SF	\$0.12	\$0.18	\$1,440.00	\$2,160.00	
8 Irrigation (sod S.F. + mulch S.F.)	1,137,000	SF	\$0.40	\$0.60	\$454,800.00	\$682,200.00	
Landscape Subtotal:					\$695,065.00	\$1,057,110.00	
F. Buildings + Structures							
1 Concessions, Restrooms, Lockers	5000	SF	\$165.00	\$210.00	\$825,000.00	\$1,050,000.00	
2 Maintenance Building	4500	SF	\$125.00	\$150.00	\$562,500.00	\$675,000.00	
Buildings + Structures Subtotal:					\$1,387,500.00	\$1,725,000.00	
G. Land Cost							
1 60-acre site (100% developable)	1	LS	\$0.00	\$1,200,000.00	\$0.00	\$1,200,000.00	
Land Cost Subtotal:					\$0.00	\$1,200,000.00	
Multi-Purpose Fields Sports Complex Subtotal:					\$11,139,065.00	\$16,584,510.00	
					15% CONTINGENCY	\$2,487,676.50	
					TOTAL	\$12,809,924.75	
						\$19,072,186.50	

NOTES:

- The estimate is subject to change based on actual site conditions.
- Estimates for construction do not include soft costs such as consultant fees, market studies, surveying, testing, etc.
- Materials identified in estimate are intended for pricing purposes only. Materials may be substituted as the design develops. Structures estimate includes FFE.
- This estimate does not include any required permitting fees, construction/contract administration fees, general conditions, or the cost of various bonds that may be required in the construction contract.
- Estimate has been assembled using in house, supplier, Client provided costs, and Means cost data. Contractor pricing may vary as well as adjust suddenly due to unforeseen elements/conditions.
- Estimate does not include the cost of land purchase or lease.

Operational Pro Forma

Leon County, Florida

Multi-Purpose Fields Sports Complex & Fieldhouse

Table 14: Budgetary Opinion of Probable Cost – Fieldhouse

DESCRIPTION	QUANT.	UNIT	UNIT PRICE RANGE		TOTAL COST RANGE		
			LOW-MODERATE	MODERATE-HIGH	LOW-MODERATE	MODERATE-HIGH	
A. Site Preparation and Earthwork							
1 Fine Grading	5.50	AC	\$8,500.00	\$10,000.00	\$46,750.00	\$55,000.00	
2 Mass Grading	50000.00	CY	\$8.00	\$16.00	\$400,000.00	\$800,000.00	
3 Erosion Control	5.50	AC	\$5,600.00	\$7,500.00	\$30,800.00	\$41,250.00	
4 Mobilization	1	SITE	\$50,000.00	\$100,000.00	\$50,000.00	\$100,000.00	
Site Preparation and Earthwork Subtotal:					\$527,550.00	\$996,250.00	
B. Drainage & Utilities							
1 Storm Drainage (Pond)	1	LS	\$200,000.00	\$300,000.00	\$200,000.00	\$300,000.00	
2 Water Line Extension	250	LF	\$34.00	\$45.00	\$8,500.00	\$11,250.00	
4 Fire Hydrant	2	EA	\$4,000.00	\$5,500.00	\$8,000.00	\$11,000.00	
5 Sanitary Extension	250	LF	\$30.00	\$50.00	\$7,500.00	\$12,500.00	
6 Underground PWR/CATV/TELECO	1	LS	\$10,000.00	\$20,000.00	\$10,000.00	\$20,000.00	
7 Outdoor Lighting (Pedestrian poles)	12	EA	\$2,200.00	\$3,200.00	\$26,400.00	\$38,400.00	
Drainage & Utilities Subtotal:					\$260,400.00	\$393,150.00	
C. Hardscape & Amenities							
1 Parking Lot	150	SP	\$1,100.00	\$1,500.00	\$165,000.00	\$225,000.00	
2 4" Concrete Walks	15,000	SF	\$4.00	\$6.00	\$60,000.00	\$90,000.00	
3 Benches	5	EA	\$1,000.00	\$2,000.00	\$5,000.00	\$10,000.00	
4 Trash Receptacles	2	LS	\$1,000.00	\$2,000.00	\$2,000.00	\$4,000.00	
Hardscape & Amenities Subtotal:					\$232,000.00	\$329,000.00	
D. Landscape							
1 Palms	12	EA	\$350.00	\$500.00	\$4,200.00	\$6,000.00	
2 Large Tree	10	EA	\$250.00	\$350.00	\$2,500.00	\$3,500.00	
3 Ornamental Trees / Lg Shrubs	15	EA	\$225.00	\$300.00	\$3,375.00	\$4,500.00	
4 Small Shrub + Ground Cover 3 gal	10,000	SF	\$3.00	\$4.50	\$30,000.00	\$45,000.00	
5 Mulch (Pinestraw)	12,000	SF	\$0.12	\$0.18	\$1,440.00	\$2,160.00	
6 Irrigation (mulch S.F.)	12,000	SF	\$0.40	\$0.60	\$4,800.00	\$7,200.00	
Landscape Subtotal:					\$46,315.00	\$68,360.00	
E. Buildings + Structures							
1 Fieldhouse	80000	SF	\$225.00	\$275.00	\$18,000,000.00	\$22,000,000.00	
Buildings + Structures Subtotal:					\$18,000,000.00	\$22,000,000.00	
F. Land Cost							
1 10-acre site (100% developable)	1	LS	\$0.00	\$1,000,000.00	\$0.00	\$1,000,000.00	
Land Cost Subtotal:					\$0.00	\$1,000,000.00	
Fieldhouse Subtotal:					\$19,066,265.00	\$24,786,760.00	
					15% CONTINGENCY	\$2,859,939.75	\$3,718,014.00
					TOTAL	\$21,926,204.75	\$28,504,774.00

NOTES:

1. The estimate is subject to change based on actual site conditions.
2. Estimates for construction do not include soft costs such as consultant fees, market studies, surveying, testing, etc.
3. Materials identified in estimate are intended for pricing purposes only. Materials may be substituted as the design develops. Structures estimate includes FFE.
4. This estimate does not include any required permitting fees, construction/contract administration fees, general conditions, or the cost of various bonds that may be required in the construction contract.
5. Estimate has been assembled using in house, supplier, Client provided costs, and Means cost data. Contractor pricing may vary as well as adjust suddenly due to unforeseen elements/conditions.
6. Estimate does not include the cost of land purchase or lease.

Section Six: Economic Impact

Table 15: Sports Tournament General Economic Impact Estimation

The Division of Tourism Development provided the following economic impact estimation. The economic impact from sports tournaments demonstrates a very strong economic impact and value to the region as demonstrated in the table below.

Sports Tournament General Economic Impact Estimations

Quantity	Teams	Participants	Visitors per Team	Total Visitors	Days	Daily Spending	Direct Spending	Economic Impact	Room Nights	ADR	Sales Tax	TD Tax	Jobs
1	36	18	27	972	3	\$ 143	\$ 416,988	\$ 600,463	486	\$ 82.43	\$ 31,274	\$ 2,003	11.44
12	432	216	324	11,664	36	\$ 143	\$ 5,003,856	\$ 7,205,552.64	5,832	\$ 82.43	\$ 375,289	\$ 24,036.59	137

Quantity	Teams	Participants	Visitors per Team	Total Visitors	Days	Daily Spending	Direct Spending	Economic Impact	Room Nights	ADR	Sales Tax	TD Tax	Jobs
1	50	18	27	1,350	3	\$ 143	\$ 579,150	\$ 833,976	675	\$ 82.43	\$ 43,436	\$ 2,782	15.88
12	600	216	324	16,200	36	\$ 143	\$ 6,949,800	\$ 10,007,712.00	8,100	\$ 82.43	\$ 521,235	\$ 33,384.15	191

Quantity	Teams	Participants	Visitors per Team	Total Visitors	Days	Daily Spending	Direct Spending	Economic Impact	Room Nights	ADR	Sales Tax	TD Tax	Jobs
1	64	18	27	1,728	3	\$ 143	\$ 741,312	\$ 1,067,489	864	\$ 82.43	\$ 55,598	\$ 3,561	20.33
12	768	216	324	20,736	36	\$ 143	\$ 8,895,744	\$ 12,809,871.36	10,368	\$ 82.43	\$ 667,181	\$ 42,731.71	244

Pro Forma 30 Tournament 50 Team projection

Quantity	Teams	Participants	Visitors per Team	Total Visitors	Days	Daily Spending	Direct Spending	Economic Impact	Room Nights	ADR	Sales Tax	TD Tax	Jobs
1	50	18	27	1,350	3	\$ 143	\$ 579,150	\$ 833,976	675	\$ 82.43	\$ 43,436	\$ 2,782	15.88
30	1,500	540	810	40,500	90	\$ 143	\$ 17,374,500	\$ 25,019,280	20,250	\$ 82.43	\$ 1,303,087.50	\$ 83,460.38	476

Visitors Per Team - # is based on the calculation of .5 persons per participant
Daily Spending - based on Daily Spending rate provided by the Florida Sports Foundation
Direct Spending - the formula (Days) X (# of Visitors) X (Daily Spending Rate)
Economic Impact - the formula (Direct Spending) X (1.44 from Dr. Bonn's Research)
Room Nights - the formula (Total Visitors) X (2nights) / (4 persons per room)
ADR - Average Daily Rate provided by Smith Travel Report 2012
Sales Tax - calculated by (Direct Spending) X (.075)
TD Tax - Tourism Development Tax calculated by (Room Nights) X (ADR) X (.05)
Jobs - Jobs calculated by Visit Florida (85 visitors =1 Job)

Section Seven: Site Selection

Upon determining preliminary facility recommendations based on the market study, potential development sites have been identified that can accommodate those recommendations. Identified site opportunities were evaluated based on a variety of criteria. Connectivity, proximity to existing services, site features, and economic development considerations are evaluated in order to ascertain the appropriateness of each site in connection with the recommendations derived from the market and destination factors outlined in sections 1-4 of this report.

7.1 Overview of Site Selection

The Team utilized County provided GIS data to create maps illustrating natural features, growth patterns, and existing infrastructure that helped inform and drive the site assessment process. The Team also met with Tallahassee – Leon County Planning Department to obtain current and projected populations and demographics for a ten (10) year planning horizon and to identify planning considerations that should be taken into account when selecting potential sites.

During this meeting, the Planning Department highlighted various issues related to growth in the region. One particularly important consideration included the trend of residents moving back into the urban core. This provides increased opportunity to further expand alternative transportation efforts in attempt to connect development nodes through public transportation and multi-modal trail systems and to provide additional services and economic generators within the Urban Service Area (USA).

Another key factor to consider is the County's Comprehensive Plan. Per the Plan, development is limited to within the USA in keeping with the desire for the City and County to grow in an economically efficient and environmentally responsible manner, promoting fiscal responsibility and natural resource preservation. All but three of the potential sites are wholly contained within the USA, with those three exceptions straddling the Urban Service Area boundary edge.

Generally speaking, major growth and redevelopment opportunities are primarily limited to the urban core, south, and east sides of the county. Apalachicola National Forest constrains growth into the southwest side of the County while growth to the north / northwest is constrained by several lakes, such as Lake Jackson, Carr Lake and Lake Iamonia, wetlands, and other natural features. See **Figure 27** for a map of the County showing general features and growth constraints.

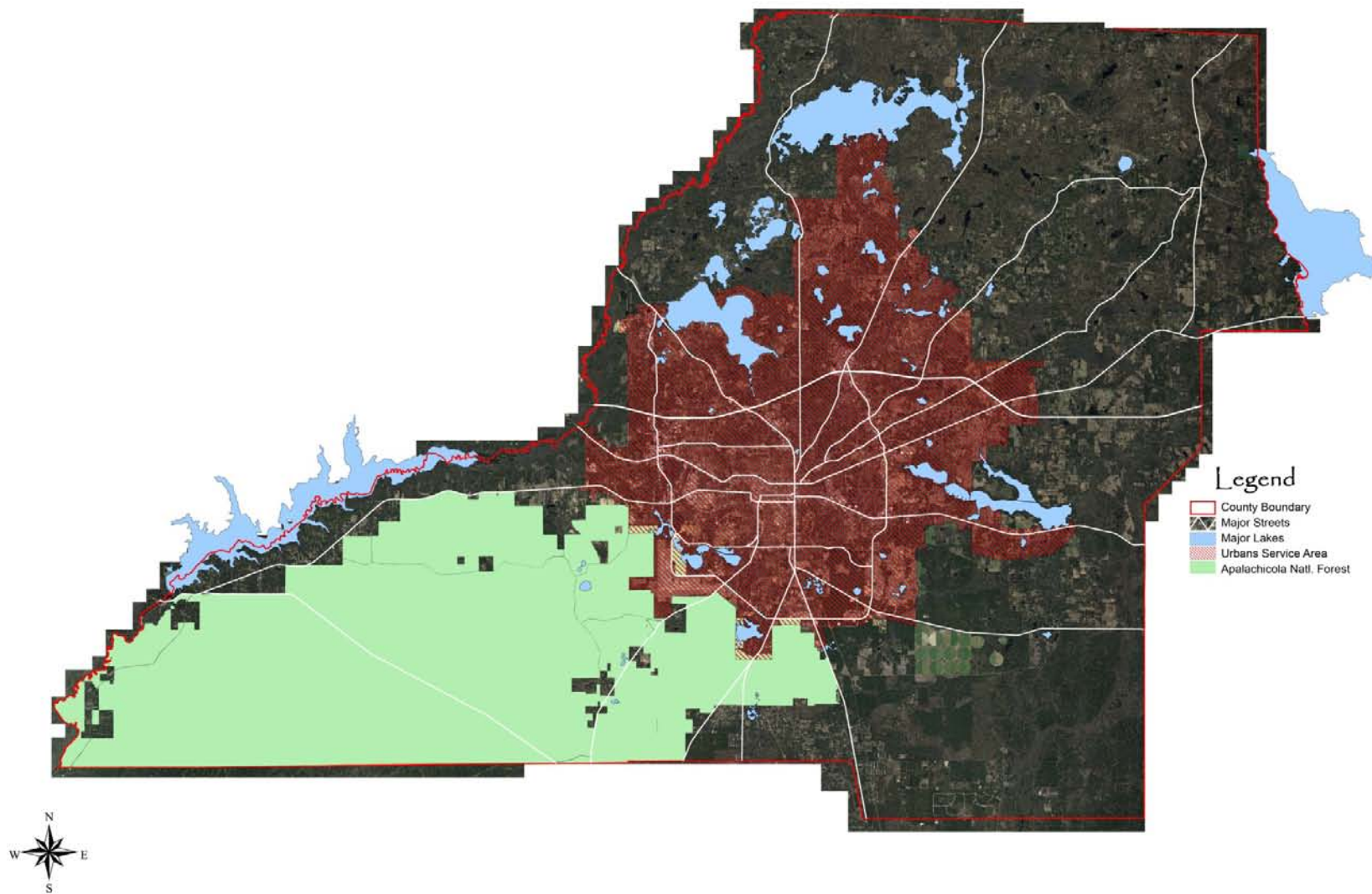


Figure 27 – County Map

7.2 Site Selection Methodology

Sites for consideration were initially identified by Leon County Staff, the project Steering Committee, and the Consultant team based on available public lands (key County owned parcels and other properties held by public entities such as City of Tallahassee and Blueprint 2000), undeveloped private sector parcels of adequate size, potential redevelopment sites, and local real estate/development knowledge.

Upon the initial site identification, REI and Wood + Partners prepared an analysis of development suitability by creating a matrix that rates various site criteria affecting the development of the proposed facility. These criteria include but are not limited to connectivity to central transportation networks (roads, transit, sidewalks/trails), adjacency to existing facilities and services, existing conditions (topography, soils, vegetation, hydrology), and zoning. Potential site opportunities also took into account the recommended facility type in order to determine the most feasible sites for specific facility development potential.

The matrix was developed by evaluating the potential sites within four distinct categories. Categories include Connectivity, Proximity, Site Features, and Economic Development. Within each category are specific criteria upon which each site is evaluated. The full list of criteria can be found in Tables 17 and 18. This evaluation method provides a means to effectively compare the viability and development potential of various sites. Each site is given a rating from one (1) to five (5) with which to rate each criterion; with one (1) being not as desirable and five (5) being the most desirable. More detailed information regarding the rating breakdown for each criterion can be found in subsequent sections 5.4 – 5.7.

7.3 Review of Potential Sites

Table 16 below lists all sites initially considered for development of a sports complex or facility within Leon County. They are listed in descending order based on their total acreage. The numbers on the left side of the table correspond to a particular site’s location as depicted on **Figure 28** and do not denote any kind of ranking order.

Current ownership information is also included in the table. It should be understood that some sites such as the Northwood Center, the St. Joe Company properties, and various others may not currently be on the market or may be otherwise occupied. These sites were considered because of location, potential land availability, and/or anticipated relocation of current tenants and/or redevelopment potential.

The geographic distribution of the potential sites is fairly evenly dispersed throughout the County. Potential sites were identified in the northern portion of the County, the east and southeast areas, the west and southwest areas of Leon County, and the central core of the city. This was done in order to test various geographic areas within the County as well as specific site criteria.

	Potential Sites	Ac. (+/-)	Ownership
1.	Southwood	3,937	St. Joe Company
2.	Southeast Side	2,275	St. Joe Company
3.	Orange Ave / Blairstone	995	English Family
4.	Welaunee Heel	892	Powerhouse Inc.

Leon County, Florida

Multi-Purpose Fields Sports Complex & Fieldhouse

5.	Tom Brown Park (expansion within)	799	Leon County
6.	Welaunee Toe Phase 1	505	CNL, Toe2
7.	Welaunee Toe Phase 2	429	COT
8.	FallsChase	373	Redus Fallschase
9.	I-10 / Capital Cir. NW (Park Place)	302	Cap. Circle Development, High Ground Investments, Shallow Lake Partners, North 10 Capital Assoc.
10.	Airport Adjacent 1	226	COT, Blueprint 2000
11.	DeVoe Moore Properties	215	Various DeVoe Moore Enterprises
12.	Tallahassee Mall	189	Stiles Farm LLC
13.	Apalachee Regional (expansion within)	160	Leon County
14.	Northeast Park	100	Leon County
15.	Fairgrounds	90	Leon County
16.	Airport Adjacent 2	65	St. Joe Company
17.	FSU Intramural Adjacent	42	Leon County
18.	Messer Park Expansion	27.4	COT/Leon County/Susan Tully, et. al.
19.	Northwood Center	24	Northwood Associates LLC
20.	Capital Cir. NW / Hwy 90 (Tax World)	24	Wells Fargo, Capital Center Investors
21.	Downtown	5.3	COT CRA

Table 16 – Potential Site List

Sites as listed above that were ultimately not considered as development opportunities for either the fieldhouse or multi-purpose field recommendation include:

- Northeast Park – site dedicated for the purpose of building amenities for local residents
- Tom Brown Park – private use restrictions associated with the federal land deeded to the County and leased to the City

Several sites were considered only for the development of the fieldhouse, as their total acreage precluded them from accommodating the necessary land required to develop the multi-purpose field complex. As stated in the proforma assumptions, the minimum acreage needed for the development of the multi-purpose field complex is 80 acres. Those sites as listed above that do not meet the necessary acreage and therefore are not being considered for multi-purpose field development include:

- Airport Adjacent 2 – 65 acres
- FSU Intramural Adjacent – 42 acres
- Messer Park Expansion – 27.4 acres
- Northwood Center – 24 acres
- Capital Cir. NW / Hwy 90 (Tax World) – 24 acres

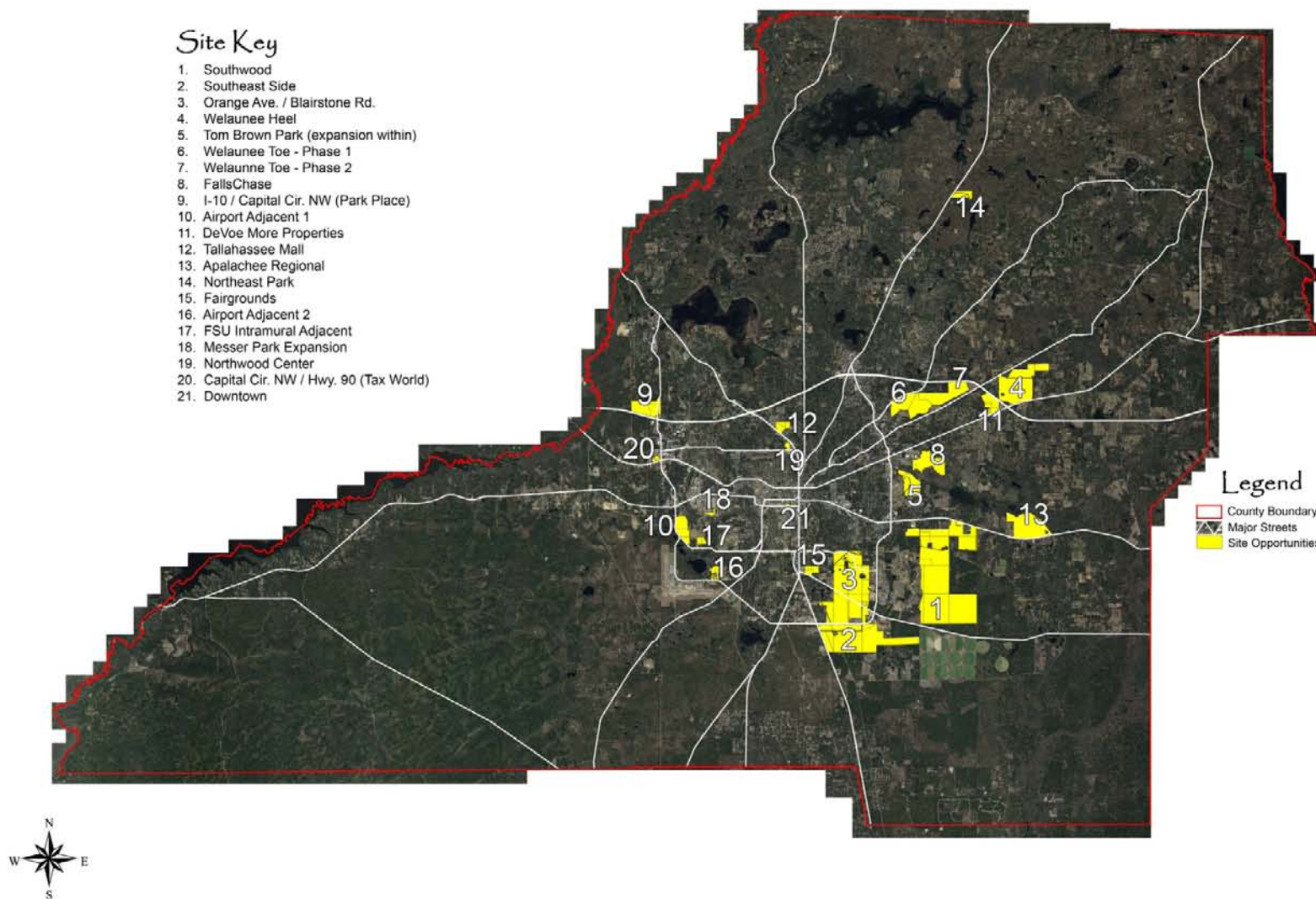


Figure 28 – Site Location Map

7.4 Connectivity Evaluation

I-10 Interchanges: The first criterion in the Connectivity category is a site’s proximity to I-10 interchanges. Currently, there are 4 primary interchanges from I-10 into Leon Count including, from the east, Mahan Drive (Highway 90), Thomasville Road, Monroe Street and Blue Star Highway (Highway 90). A site’s proximity and ease of access to an interstate interchange is a valuable factor to consider when attracting users within the 200 mile target area. Connectivity to the interstate allows participants to travel to and from the site with greater ease. Sites were scored based on their 1 mile or 5 mile proximity to the interchange. Distances were generated from creating a straight line radius at both 1 mile and 5 miles from the center of the interchange as shown in **Figure 29**.

Scoring Breakdown

2 – site located outside all mapped distances
4 – site located at 5 mile edge
6 – site located within 5 mile distance
8 – site located at 1 mile edge
10 – site located within 1 mile distance

Major Roadways: Much like access to the Interstate, a site should be easily accessible to major roadways within the host community. Sites were scored based on their proximity to select principle arterial roads within a ¼ mile, ½ mile, ¾ mile, or 1 mile distance as shown in **Figure 30**. The Principle Arterial Roads selected for site selection purposes are Monroe Street, Tennessee Street, Mahan Drive, Apalachee Parkway, Capital Circle, Thomasville Road, Crawfordville Road, and Woodville Highway. These principle arterial roads were selected as they serve as primary connectors into the County from surrounding areas.

Scoring Breakdown

1 - site located outside all mapped distances
2 – site located within 1 mile distance
3 –site located within 3/4 mile distance
4 – site located within 1/2 mile distance
5 – site located within 1/4 mile distance

Multi Modal District: With the Planning Department’s commitment to providing mass transit opportunities, sites that are located within the designated Multi Modal District are scored as more desirable. Linking a site to the host community through mass transit is an asset that provides increased connectivity and access to entertainment, lodging, and retail centers throughout the city. Each site’s proximity to the Multi Modal District can be seen in **Figure 31**.

Scoring Breakdown

1 – site located outside MMD boundary
3 – site located at boundary edge (outside)
5 –site located inside MMD boundary

Airport: Connectivity and access to the airport is a consideration to take into account, especially when promoting and attracting statewide, southeastern, and national sporting events. Sites were scored based on their proximity to Tallahassee Regional Airport within a 1 mile, 5 mile, or 10 mile distance as shown in **Figure 32**.

Scoring Breakdown

1 – site located outside all mapped distances
2 – site located within 10 mile distance
3 – site located within 5 mile distance
4 – site located within 1 mile distance
5 – site located directly adjacent to airport

Walkability/Bikeability: Pedestrian connectivity to a new sports complex or facility is desirable. Pedestrian connectivity allows users to easily access adjacent services without having to depend on automobiles or mass transit. Sites were scored on their relationship/proximity to existing sidewalk and trail systems throughout the county as shown in **Figure 33**.

Scoring Breakdown

1 – site is not at all connected via sidewalks and/or trails
3 – site is somewhat connected via sidewalks and/or trails
5 – site is highly connected via sidewalks and/or trails

The top scoring fieldhouse sites within the Connectivity category include:

- Tallahassee Mall – 23 points
- Northwood Center – 23 points
- Downtown – 23 points

The top scoring multipurpose field sites within the Connectivity category include:

- Tallahassee Mall – 23 points
- Welaunee Heel – 20 points
- I-10 / Capital Cir. NW (Park Place) – 20 points
- Fairgrounds – 20 points

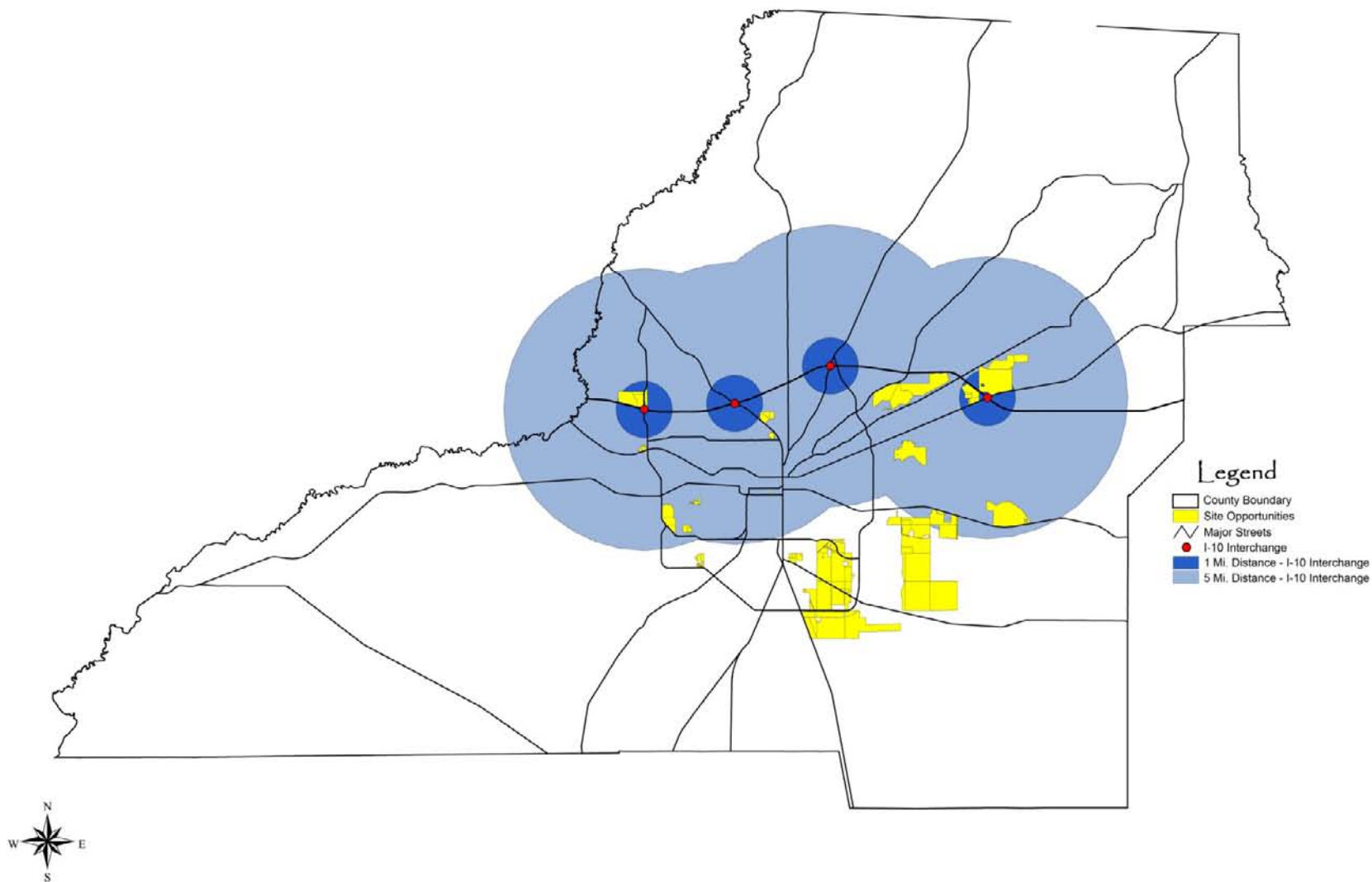


Figure 29 –Distance from Interstate 10 Interchanges

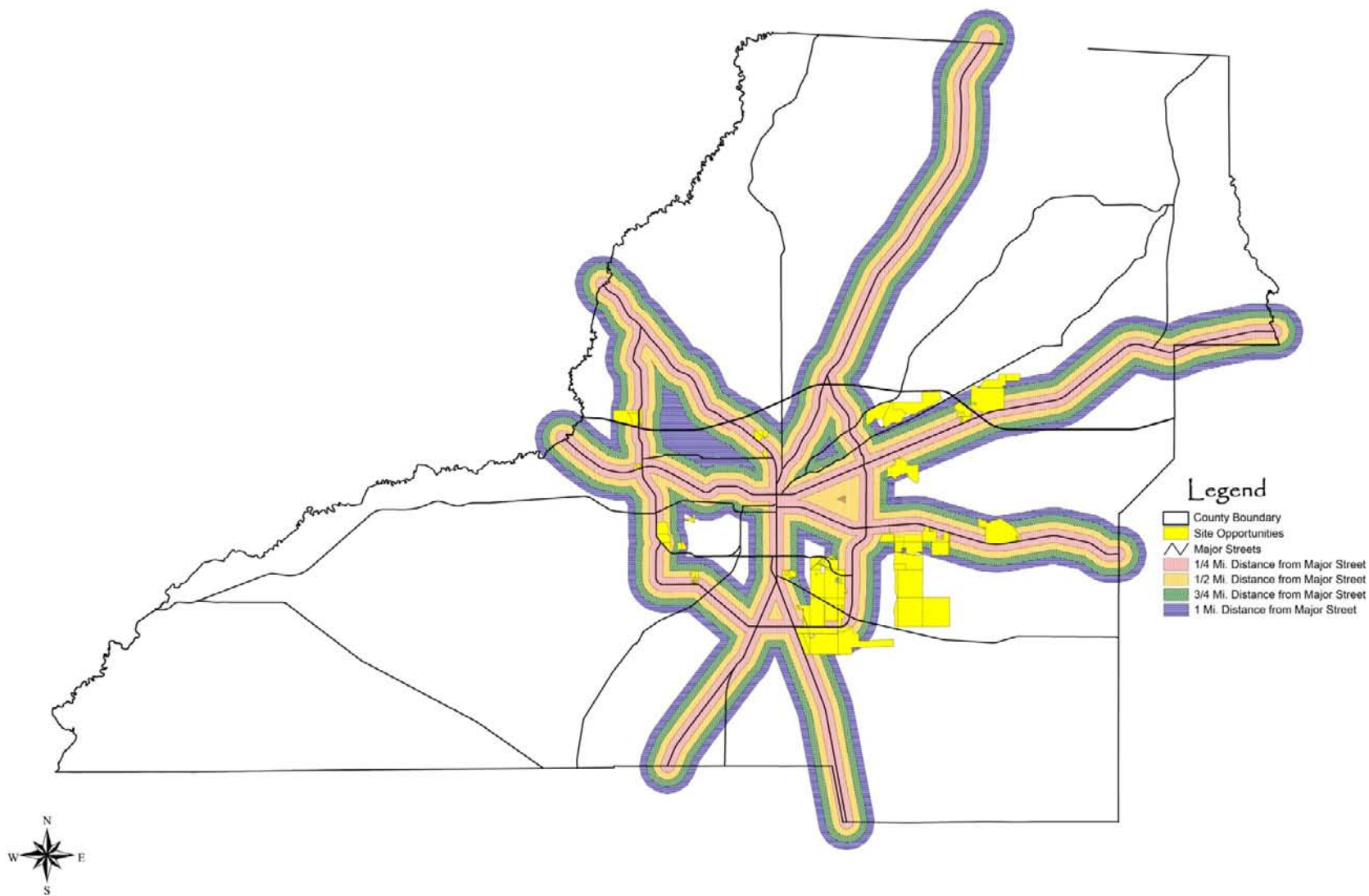


Figure 30 – Distance from Major Roadways

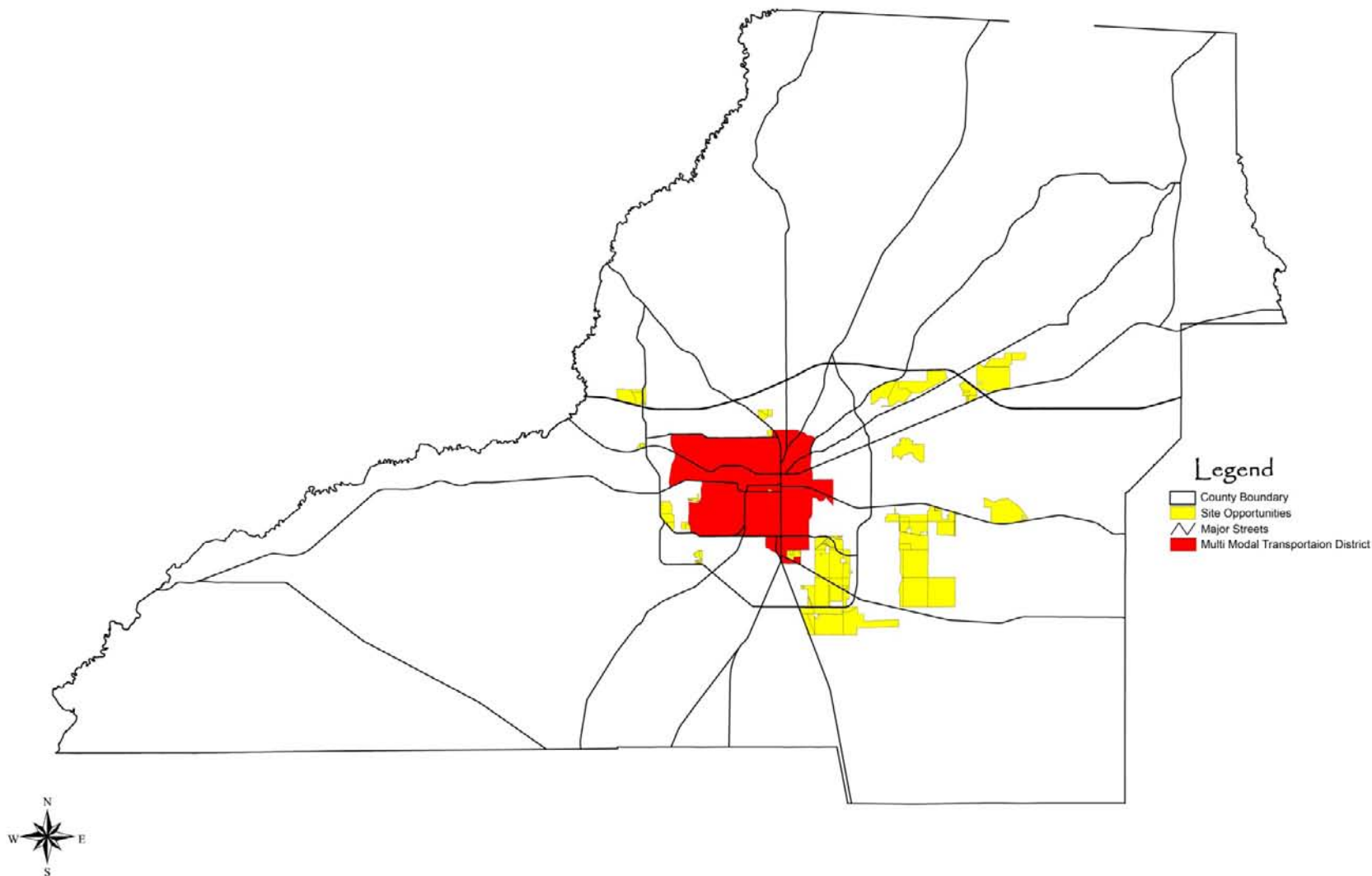


Figure 31 – Proximity to Multi Modal Transportation District

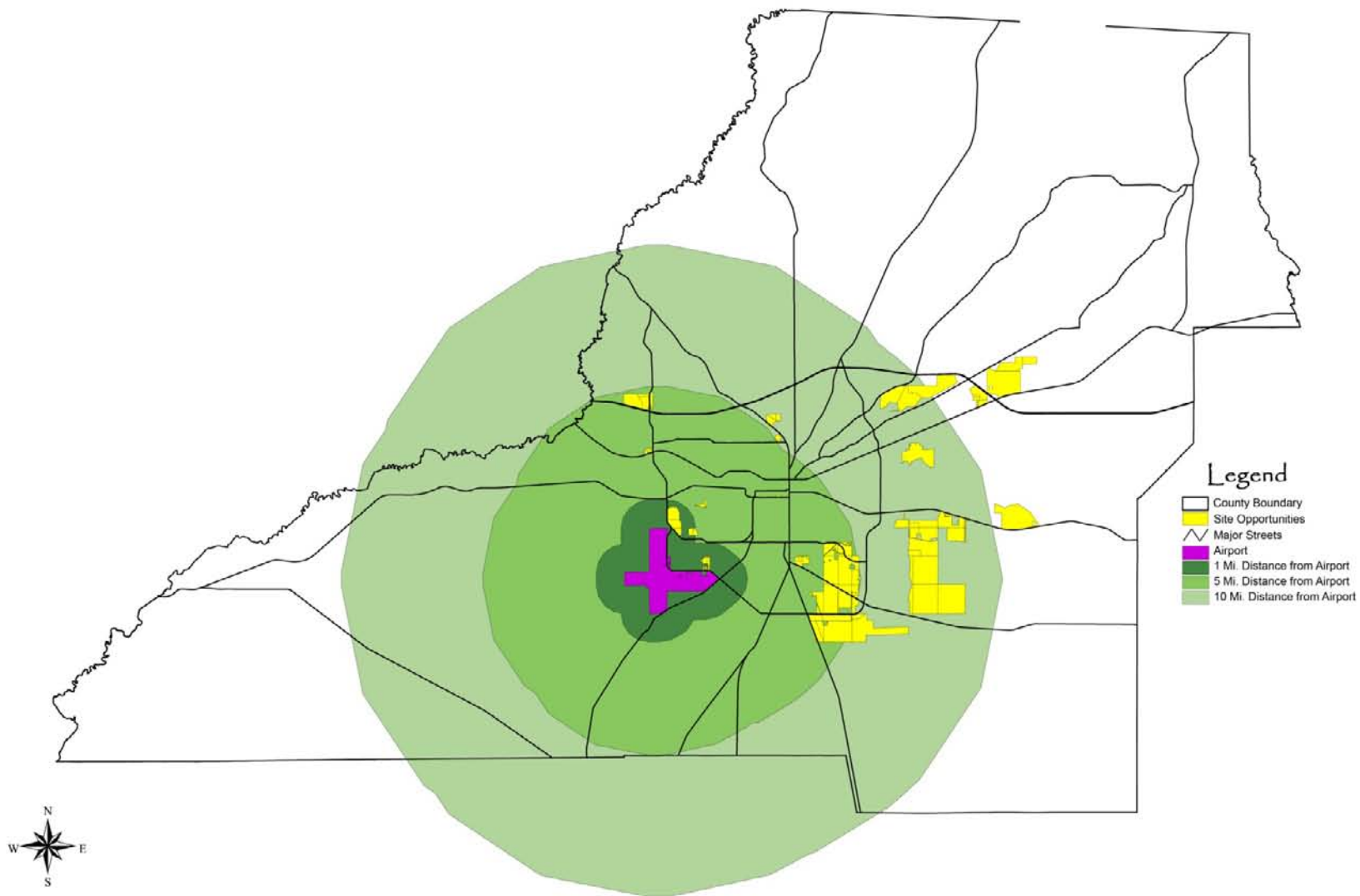


Figure 32 – Proximity to Tallahassee Regional Airport

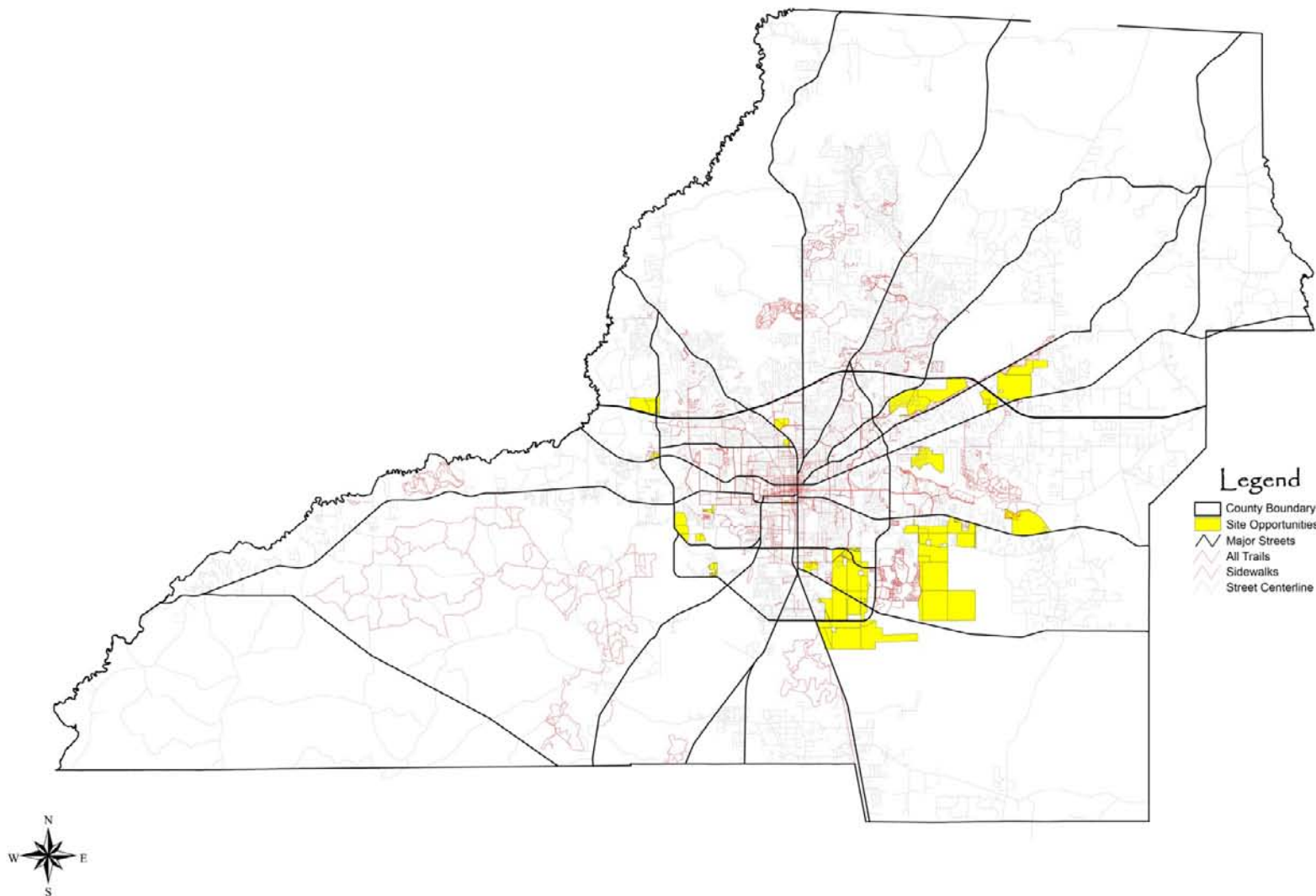


Figure 33 –Connectivity to Existing Sidewalks and Trails

7.5 Proximity Evaluation

Hotel: Potential sites were also scored on their proximity to local services, the first of which being hotels and motels. Hotel/motel locations were derived from county GIS landuse data. Each potential site was scored based on its distance from existing hotel/motel locations within a one (1) mile, five (5) mile, or greater distance as shown in **Figure 34**.

Scoring Breakdown

2 – site located outside all mapped distances
4 – site located at 5 mile edge
6 – site located within 5 mile distance
8 – site located at 1 mile edge
10 – site located within 1 mile distance

Regional Retail: Accessibility to retail and entertainment destinations enhances a site’s development appeal, providing the necessary support services and desired activity centers that draw spending dollars into the local economy. Regional shopping and entertainment districts identified for purposes of this study include Downtown, Midtown, Market Square, North Monroe, and Governor’s Square/Apalachee Parkway. Each potential site was scored based on its distance from these regionally recognized districts within a one (1) mile, five (5) mile, or greater distance as shown in **Figure 35**.

Scoring Breakdown

1 – site located outside all mapped distances
2 – site located at 5 mile edge
3 – site located within 5 mile distance
4 – site located at 1 mile edge
5 – site located within 1 mile distance

Hospital: Another factor to consider, especially when exploring the development of a sports centered facility, is a site’s proximity to area hospitals. Each potential site was scored based on its distance from Tallahassee Memorial Hospital and/or Capital Regional Medical Center within a one (1) mile, five (5) mile, or greater distance as shown in **Figure 36**.

Scoring Breakdown

1 – site located outside all mapped distances
2 – site located at 5 mile edge
3 – site located within 5 mile distance
4 – site located at 1 mile edge
5 – site located within 1 mile distance

The top scoring fieldhouse sites within the Proximity category include:

- Tallahassee Mall – 18 points
- Northwood Center – 18 points
- Downtown – 18 points

The top scoring multipurpose field sites within the Proximity category include:

- Tallahassee Mall – 18 points
- Welaunee Toe Phase 1 – 15 points
- DeVoe Moore Properties – 15 points

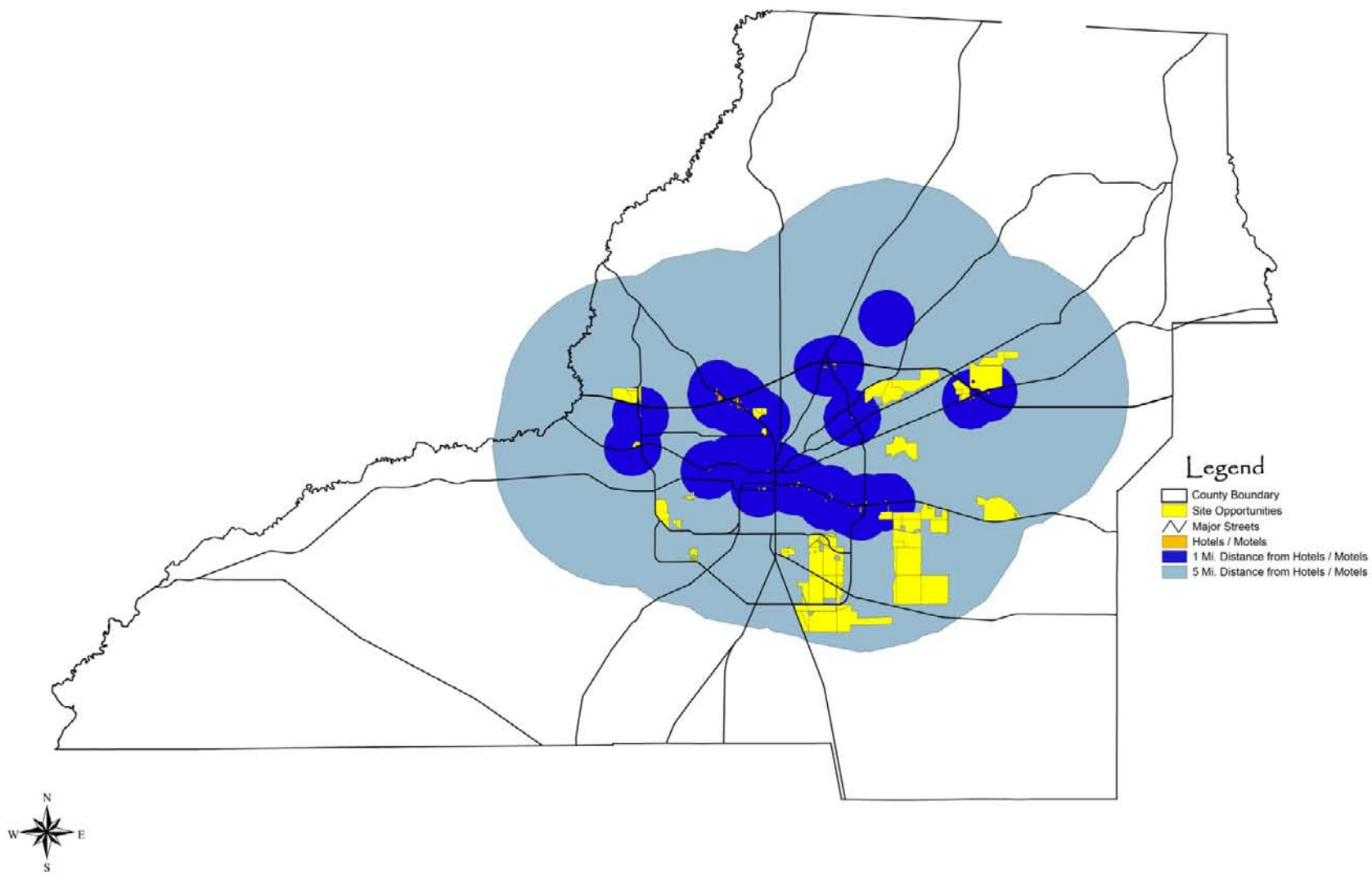


Figure 34 – Hotel / Motel Proximity

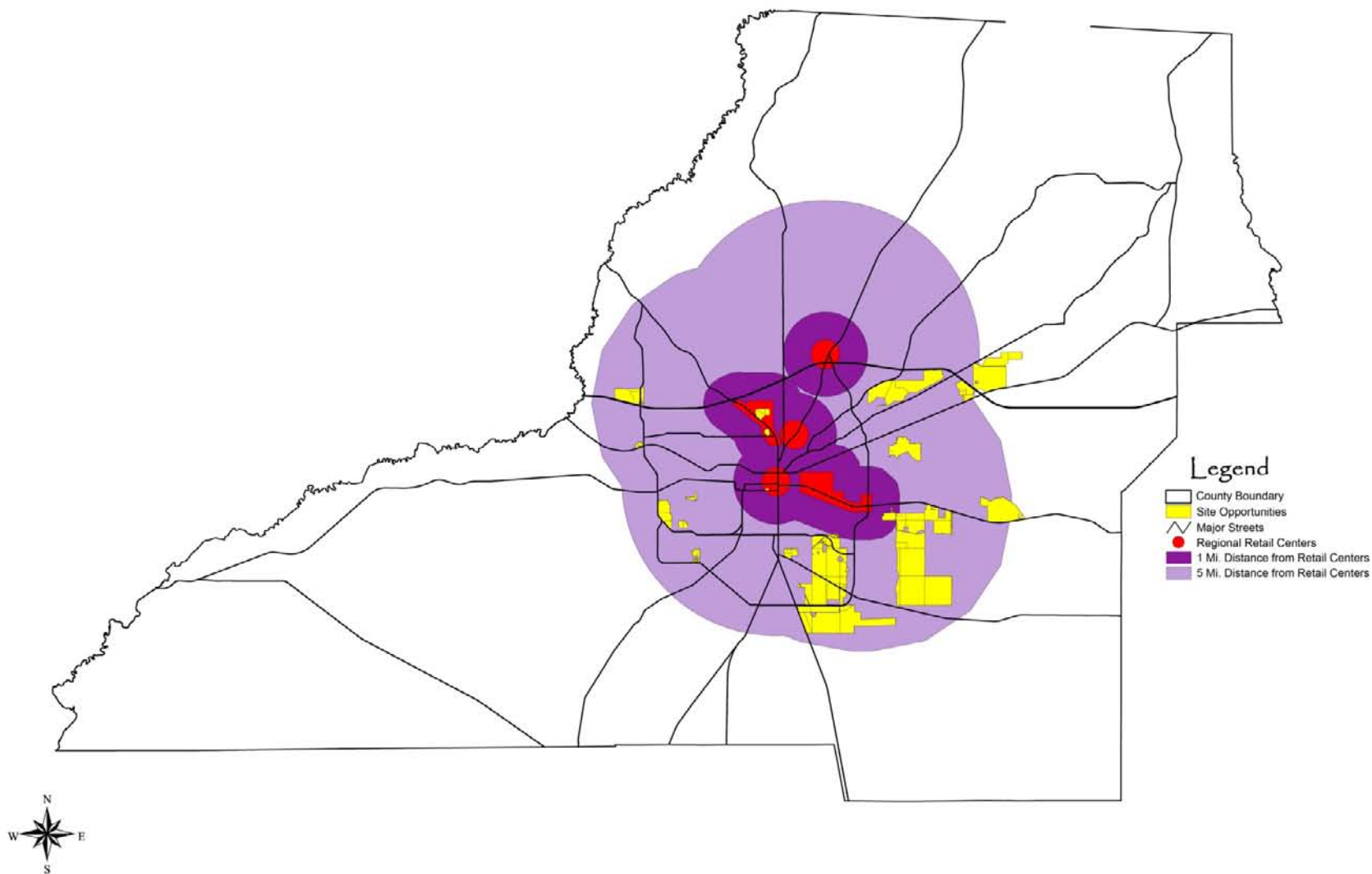


Figure 35 – Regional Retail Proximity

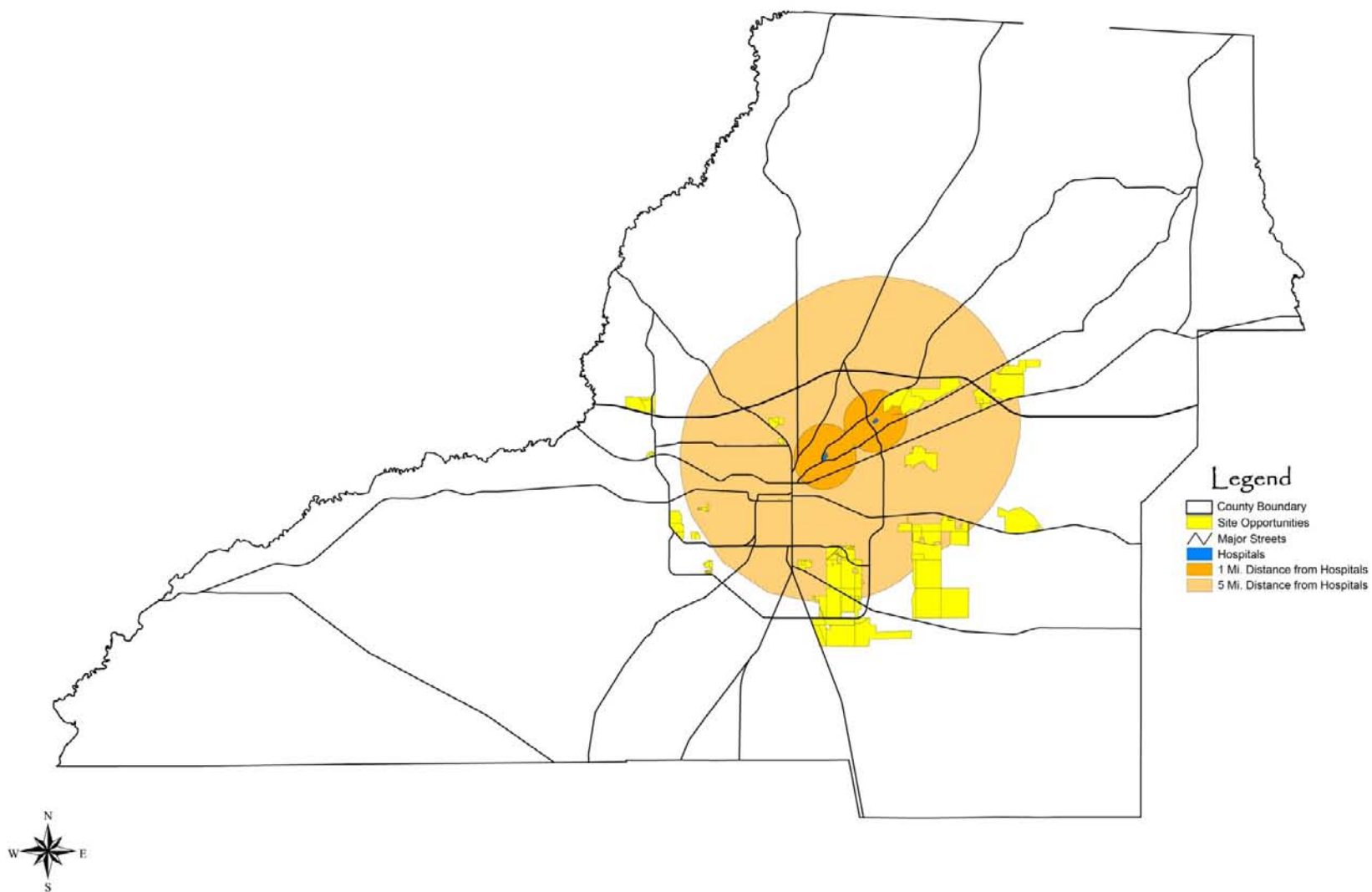


Figure 36 – Hospital Proximity

7.6 Site Features Evaluation

The data provided for site features evaluation is taken from GIS data provided by the County. While certain characteristics are more specific than others, it is recommended that in order to fully understand the actual site characteristics, further investigation will be required. Site surveys and soils tests can reveal information that GIS data often times will not be able to predict. However, in order to get closer to a smaller sub-set of sites to consider, utilizing GIS is an affordable and effective way to quickly get baseline information about each site.

Topography: Topography can play a huge factor in the economic and environmental viability of developing a site. The potential site opportunities were evaluated on the amount of land that was hindered by severe and/or significant grade per County GIS data as shown on **Figure 37**. Severe grade is defined as slopes greater than 20%. Significant grade is defined as slopes greater than or equal to 10% and less than or equal to 20%.

Scoring Breakdown

1 – site exhibits severe grade
2 – site exhibits somewhat severe grade
3 – site exhibits significant grade
4 – site exhibits somewhat significant grade
5 – site exhibits no sever/significant grade constraints

Vegetation: Leon County is graced with an abundance of high quality forests and canopy trees. These ecosystems should be protected where possible, especially within the urban environment. However, when developing sports fields and facilities, forests, specimen trees, and areas of dense vegetation can prove to be an encumbrance. The potential sites were evaluated from a macro level on the presence of high quality/native upland forests and existing canopy trees and associated 100’ buffer as shown in **Figure 38**. Site specific data revealed only through a site survey will be the only way to know for certain, the quality of vegetation present at each site.

Scoring Breakdown

1 – site exhibits major encumbrances
3 – site exhibits minor encumbrances
5 – site exhibits no encumbrances

Hydrology / Wetlands: Another natural feature that can be an insurmountable encumbrance is hydrological features such as wetlands, marshes, lakes, and streams. **Figure 39** depicts these natural features as well as areas of localized flooding and FEMA flood zone classifications.

Scoring Breakdown

1 – site exhibits major encumbrances
3 – site exhibits minor encumbrances
5 – site exhibits no encumbrances

Development Constraints: Development constraints can be defined as environmental issues associated with developing brownfields, code and/or zoning restrictions that may arise from redeveloping urban sites, or a site’s location outside the urban service area limits, among others. The matrix ratings for this category were derived from evaluating potential sites at a macro level and site opportunities may require further site specific investigation to determine if additional development constraints exist.

Scoring Breakdown

1 – site exhibits major known encumbrances
3 – site exhibits minor known encumbrances
5 – site exhibits no known encumbrances

Soils: When developing outdoor sports facilities, soils and their ability to provide adequate drainage can make or break a site’s development viability. Soils also play a role when developing an indoor facility, but constraints can typically be structurally and financially overcome. Sites with excessively or very poorly drained soils are considered undesirable, as their ability to sustain areas of healthy turf are greatly diminished. Moderately well drained and well drained soils are the most desirable as they can typically support healthy turf establishment while still quickly wicking away water during playtime rain events, allowing for a greater possibility of resuming play. However, due to the variability that can exist from by utilizing broad-brushed soils data, it is highly recommended that site specific soils information be collected to fully understand the soils and drainage characteristics. Soil drainage classifications for each potential site can be found on **Figure 40**.

Scoring Breakdown

1 – site exhibits Excessively Drained or Very Poorly Drained soils
2 – site exhibits Poorly Drained soils
3 – site exhibits Somewhat Poorly Drained soils
4 – site exhibits Moderately well drained soils
5 – site exhibits well drained soils

Existing and Adjacent Landuse: **Figures 41** depicts the existing land use of each site as well as landuses of adjacent parcels. It is important to determine both the existing and adjacent landuses of potential sites to determine if those uses are compatible or incompatible with each other. For example, if an adjacent land use such as is residential is found to be adjacent, it may not be as compatible (due to the sports lighting) as commercial, and would therefore be scored as not compatible.

Scoring Breakdown

1 – landuse not compatible
3 – landuse somewhat compatible
5 – landuse compatible

Zoning: Much like evaluating landuse compatibility, existing zoning categories play a role in the development of a site. It is assumed that both the multi-purpose fields and the indoor fieldhouse options are considered as active recreation. The matrix scores each site as to whether active recreation is allowed within the current zoning category. If not allowed, a site would need to go through the process of getting rezoned to a category which allows this type of activity, potentially adding time and costs to a development project. **Figure 42** depicts the current zoning categories of each potential site.

Scoring Breakdown

1 - active recreation not allowable within zoning category
3 – active recreation allowable within zoning category
4 – active recreation and retail or hotel allowable within zoning category
5 – active recreation, retail, and hotel allowable within zoning category

Existing Utility infrastructure: Potential sites were also evaluated on their ability to connect to existing utilities. Existing utilities evaluated include electric, water, sanitary sewer, and gas. Evaluation was based strictly on the availability of existing utilities at the development sites. Further investigation would need to take place to determine the carrying capacity of those existing facilities.

Scoring Breakdown

1 – site not connected to existing utilities
3 – site somewhat connected to existing utilities
5 – site well connected to existing utilities

The top scoring fieldhouse sites within the Site Features category include:

- Welaunee Toe Phase 2 – 43 points
- Fairgrounds – 42 points
- Capital Cir. NW / Hwy 90 (Tax World) – 42 points

The top scoring multipurpose field sites within the Site Features category include:

- Welaunee Heel – 43 points
- Welaunee Toe Phase 2 – 43 points
- Welaunee Toe Phase 1 – 42 points
- FallsChase – 42 points
- DeVoe Moore Properties – 42 points
- Fairgrounds – 42 points

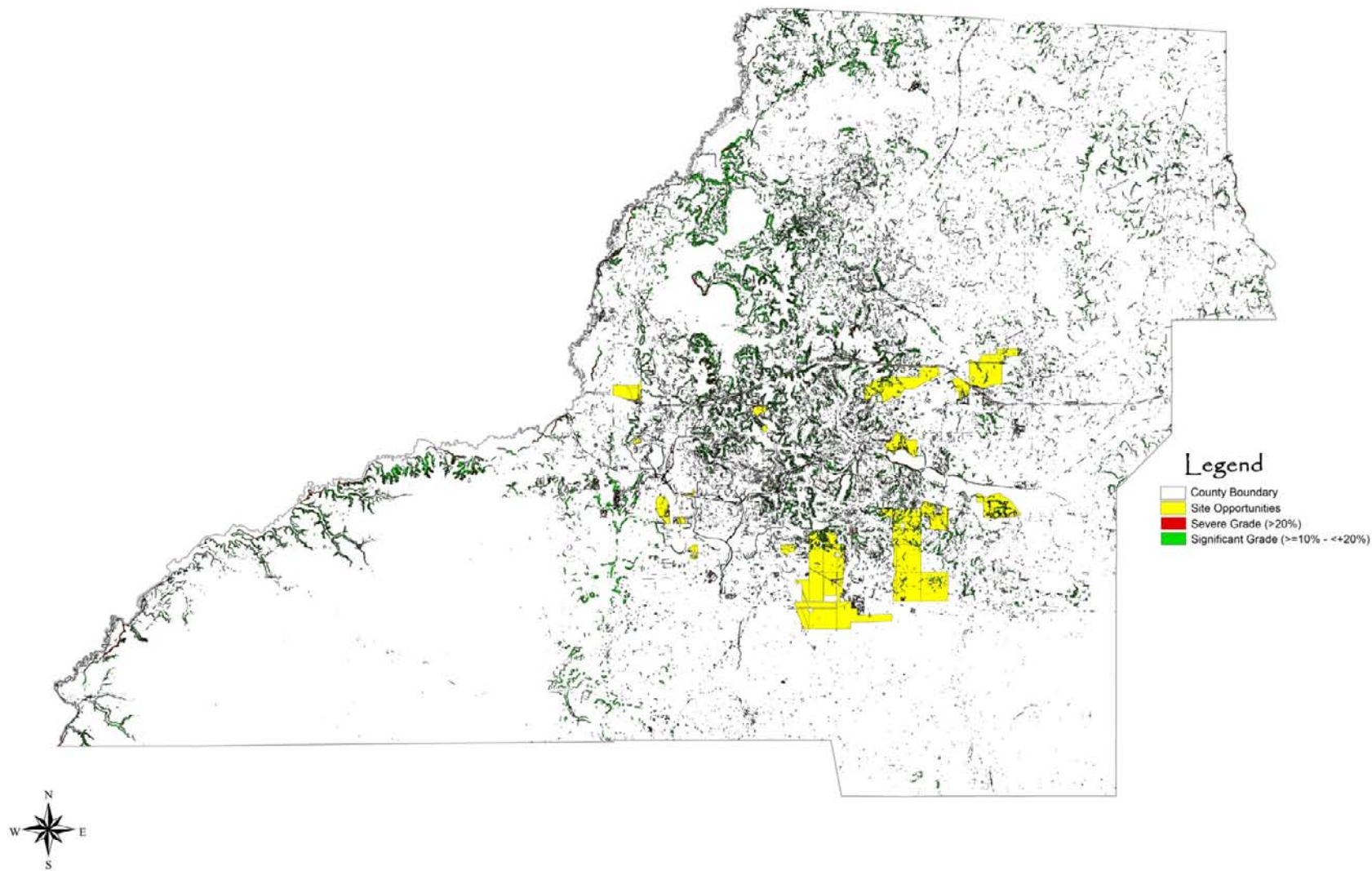


Figure 37 – Existing Topography

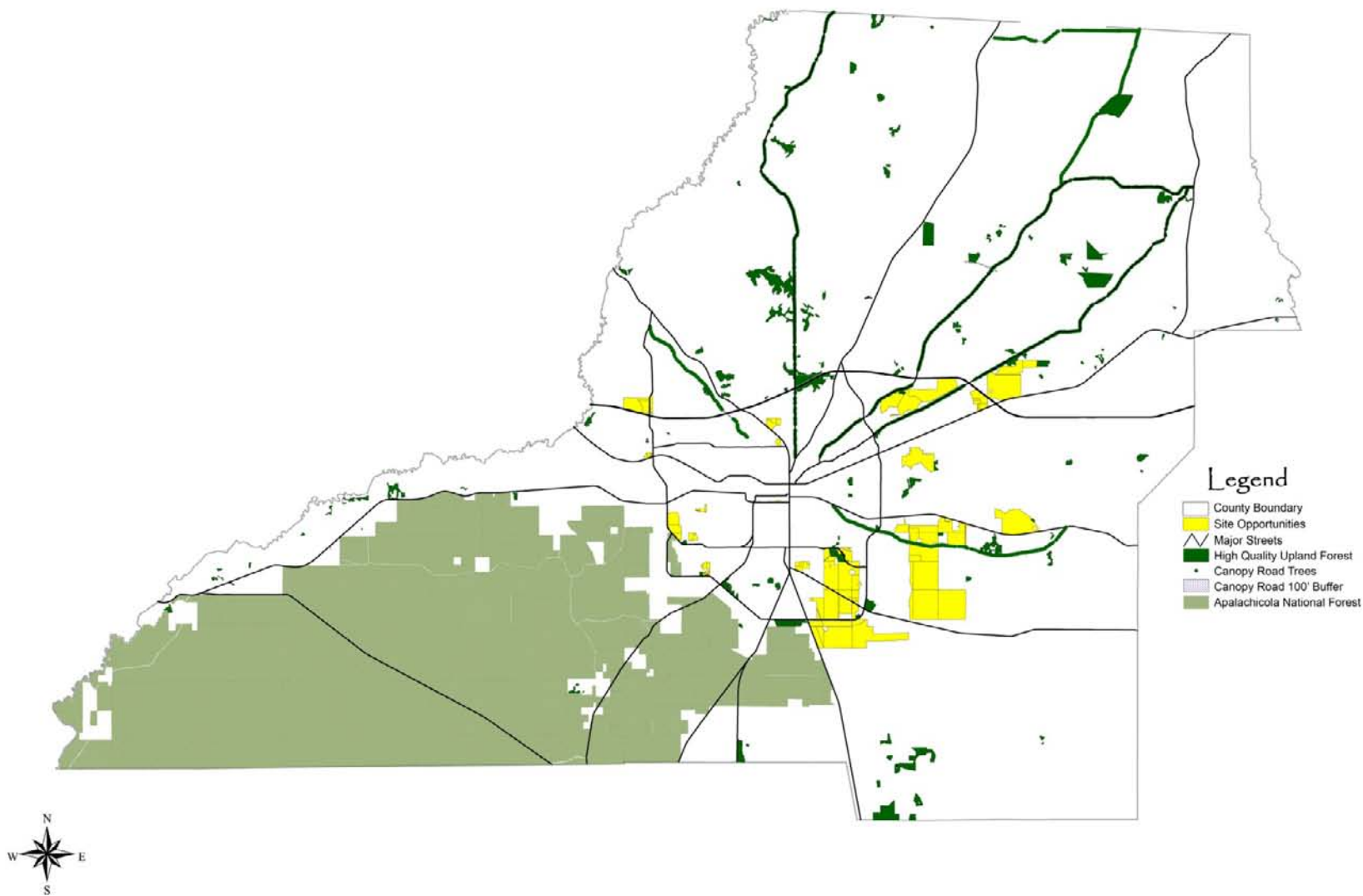


Figure 38 – Existing Vegetation

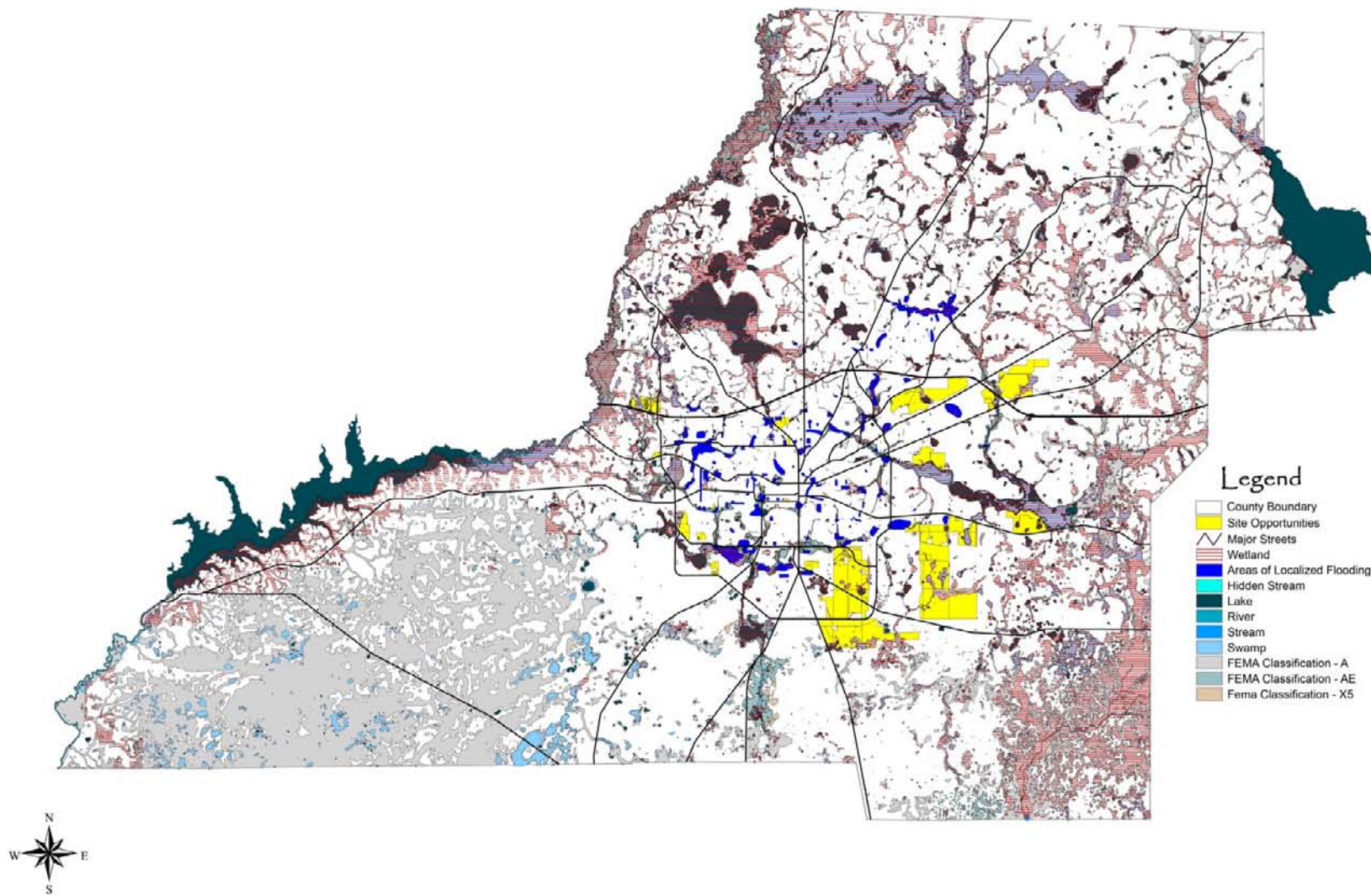


Figure 39 – Existing Hydrological Features

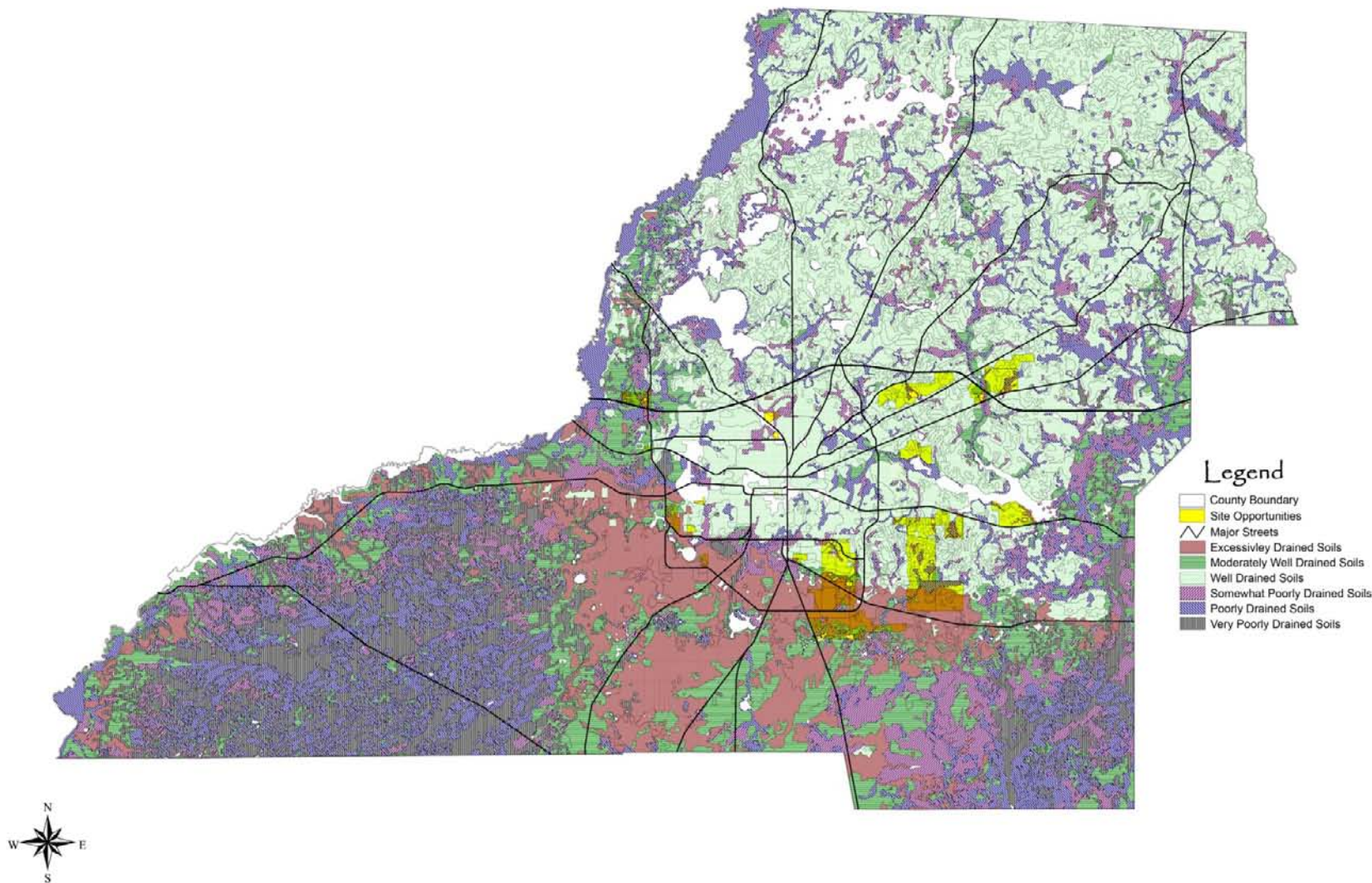


Figure 40 – Existing Soil Drainage Capacity

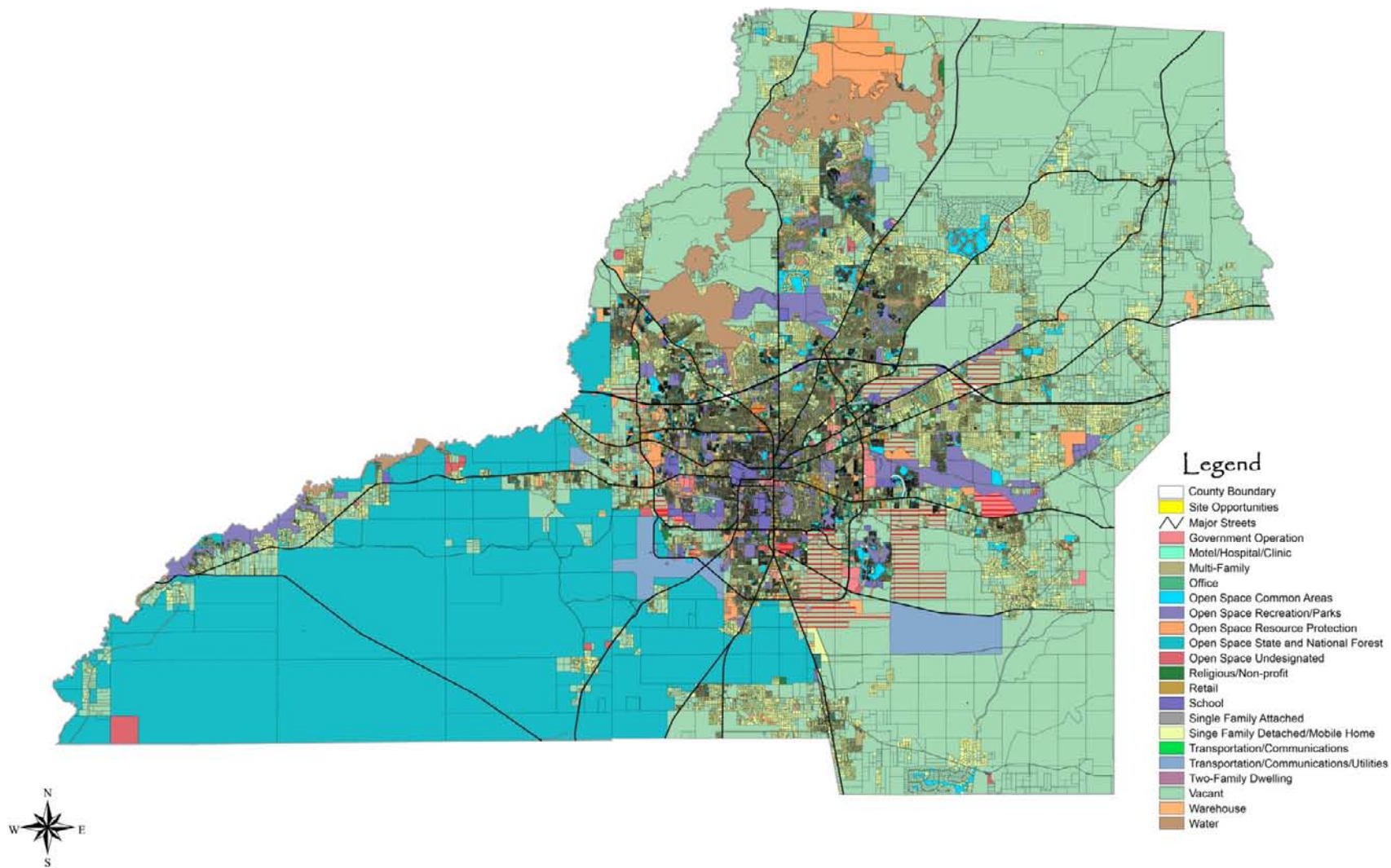


Figure 41 – Existing and Adjacent Landuse

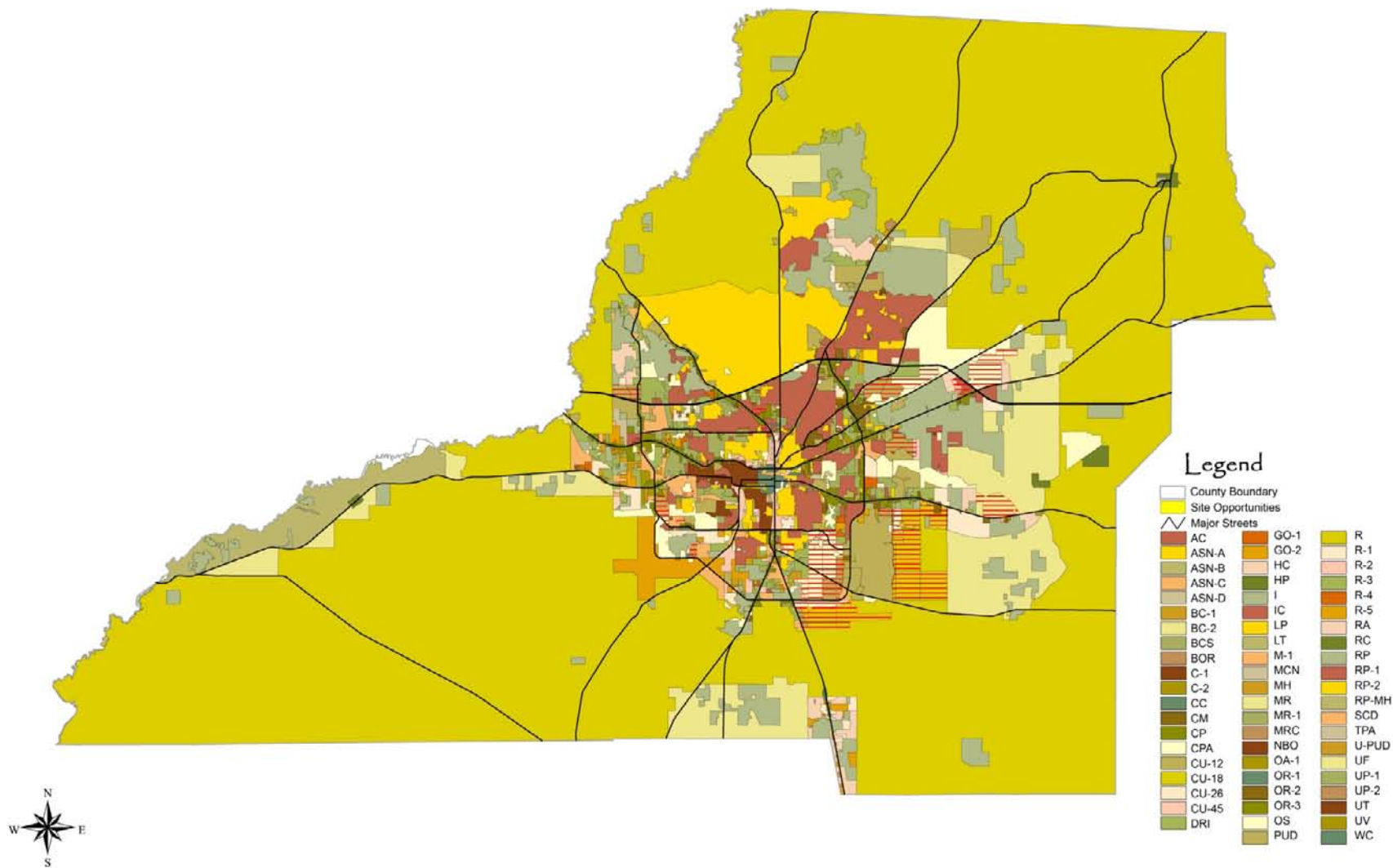


Figure 42 – Existing Zoning Designations

7.7 Economic Development Evaluation

Sites were rated based on their impact with economic development within the County. The location of the project can be rated based on its ability to support new sports infrastructure and related development as well as supporting existing sports infrastructure services. Also, ownership of the property may play a major role in the project.

New Development Potential (Greenfield): Developing a greenfield (not previously developed) site provides the opportunity for new development potential centered around the sports complex, creating a new growth district and could potentially attract new companies and vendors and ultimately economic stimulus to the area. Those sites that are currently greenfields provide the most opportunity to spur new growth in their respective locations.

Scoring Breakdown

1 – site has low new development potential
3 – site has new development potential
5 – site has high new development potential

Redevelopment Potential (Greyfield): On the other end of the spectrum is redevelopment of greyfields (previously developed sites). Redeveloping greyfields provides the opportunity to enhance the fabric of the neighborhood and support existing business as well as utilize new technology and techniques to develop a more sustainable environment than what was previously located at the site.

Scoring Breakdown

1 – site has low redevelopment potential
3 – site has redevelopment potential
5 – site has high redevelopment potential

Ownership: Ideally, the potential site would be owned by Leon County or other public entity to avoid the burden of having to purchase the land. Sites were given a score of five if already owned by the County, a three if owned by another public agency such as the City of Tallahassee or Blueprint 2000, and a one if the site is currently owned by a private entity.

Scoring Breakdown

1 – site exhibits major encumbrances
3 – site exhibits minor encumbrances
5 – site exhibits no encumbrances

The top scoring fieldhouse sites within the Economic Development category include:

- Fairgrounds – 15 points
- FSU Intramural Adjacent – 13 points
- Airport Adjacent 1 – 11 points
- Apalachee Regional – 11 points

The top scoring multipurpose field sites within the Economic Development category include:

- Fairgrounds – 15 points
- Airport Adjacent 1 – 11 points
- Apalachee Regional – 11 points

7.8 Synthesis of Site Evaluation and Site Recommendations

After evaluating and combining the scores from each category, five sites stood out as leaders for the development of the fieldhouse. The top scoring overall fieldhouse sites include (see **Table 17**):

- Downtown – 90 points
 - o Potential collaboration with Convention Center proposal
 - o Great access to existing services (hotel, retail, entertainment)
- Northwood Center – 89 points
 - o Existing tenants, property not currently available
 - o Great access to existing services (hotel, retail, entertainment)
- Fairgrounds – 88 points
 - o Potential redevelopment catalyst for the area
 - o Current Fairground uses displaced –will need to relocate the Fairgrounds
- Tallahassee Mall – 87 points
 - o Existing ground leases, could extend redevelopment timeframes
 - o Excellent access to I-10 and existing services (hotel, retail, entertainment)
- Capital Cir. NW / Hwy 90 (Tax World) – 87 points
 - o Potential redevelopment catalyst for the area – enhance existing neighborhood
 - o Requires demolition and is in the Lake Munson drainage basis (potential flooding and stormwater issues)

After evaluating and combining the scores from each category, four sites stood out as leaders for the development of the multi-purpose fields. The top scoring overall multipurpose field sites include (see **Table 18**):

- Fairgrounds – 88 points
 - o Potential redevelopment catalyst for the area
 - o Current Fairground uses displaced –will need to relocate the Fairgrounds
- Welaunee Heel – 84 points
 - o Excellent access to I-10 and favorable site conditions for development
 - o Part of the Critical Area Plan – may require a comp plan change
- Tallahassee Mall – 83 points
 - o Existing ground leases, could extend redevelopment timeframes
 - o Excellent access to I-10 and existing services (hotel, retail, entertainment)
- DeVoe Moore Properties – 82 points
 - o Property not currently available
 - o Excellent access to I-10

It should be noted that the Fairgrounds and the Tallahassee Mall sites show up as top scorers in both recommendation scenarios.

Potential Sites - Fieldhouse	Total Acreage (+/-)	Connectivity				Subtotal	Proximity			Subtotal	Site Data								Subtotal	Econ. Dev.			Subtotal	Total	Ownership	Comments			
		I-10 (Interchange)	Major Roadways	Adjacency to Multi-Modal District / Mass Transit	Airport		Walkable/bikeable (sidewalks, trails)	Hotels	Retail (Restaurants/Entertainment) - Regional Districts		Hospitals	Topo	Vegetation (in or impacts Conservation lands)	Hydrology/Wetlands	*Development Constraints (Env. issues, Brownfield, Urban Redv., USA limits, etc.)	Soils	Existing Land Use	Adjacent Land Use		Zoning (appropriate category)	Existing Infrastructure (Utilities)	Potential for New Development					Potential to enhance existing neighborhood	Ownership	
1. Southwood	3,937	2	4	1	2	3	12	8	4	2	14	4	3	3	3	4	5	3	5	**R,CPA,PUD	3	33	5	3	1	9	68	St. Joe Company	partially outside USA limits
2. Southeast Side	2,275	2	5	1	3	5	16	6	2	1	9	5	5	3	3	1	5	3	5	**CPA,R-3,R,PUD	5	35	5	1	1	7	67	St. Joe Company	partially outside USA limits
3. Orange Ave / Blairstone	995	2	4	3	3	5	17	6	3	2	11	3	3	3	5	5	1	5	**CPA	3	33	3	3	1	7	68	English Family	selected for Veterans Affairs Clinic	
4. Welaunee Heel	892	10	5	1	1	3	20	10	2	2	14	5	5	3	5	5	3	5	**CPA	5	41	5	1	1	7	82	Powerhouse Inc.	part of CAP - may require comp plan change	
6. Welaunee Toe Phase 1	505	6	2	1	2	3	14	8	3	4	15	4	3	5	5	5	3	5	**PUD	5	40	5	1	1	7	76	CNL, Toe2		
7. Welaunee Toe Phase 2	429	8	1	1	2	3	15	6	3	3	12	5	5	5	5	5	5	5	**CPA	3	43	5	1	3	9	79	COT		
8. FallsChase	373	6	4	1	2	3	16	6	3	3	12	2	5	5	5	5	3	5	**PUD,R-2	5	40	3	5	1	9	77	Redus Fallschase	cost encumbrance	
9. I-10 / Capital Cir. NW (Park Place)	302	10	5	1	3	1	20	8	3	1	12	5	5	1	5	2	5	3	5	**PUD	3	34	5	3	1	9	75	Cap. Circle Devlpmt, High Ground Investments, Shallow Lake Partners, North 10 Capital Assoc.	
10. Airport Adjacent 1	226	4	5	1	4	1	15	6	3	1	10	4	5	1	5	1	5	5	5	**PUD,M-1,OS	5	36	5	3	3	11	72	COT, Blueprint 2000	
11. DeVoe Moore Properties	215	10	5	1	1	1	18	10	2	3	15	5	5	3	5	4	5	3	5	RA,IC,C-2	5	40	5	1	1	7	80	Various DeVoe Moore Enterprises	
12. Tallahassee Mall	189	8	5	3	2	5	23	10	5	3	18	5	5	3	3	5	5	5	AC	5	39	1	5	1	7	87	Stiles Farm LLC	legal encumbrance, existing ground leases	
13. Apalachee Regional	160	4	5	1	1	3	14	6	2	1	9	1	5	3	1	5	1	5	4	UF	3	28	5	1	5	11	62	Leon County	landfill, partially outside USA limits
15. Fairgrounds	90	2	5	5	3	5	20	6	3	2	11	5	5	5	5	5	3	4	**PUD,OS,OR-2	5	42	5	5	5	15	88	Leon County	existing fairground uses displaced - relocate	
16. Airport Adjacent 2	65	2	5	1	5	1	14	6	3	1	10	4	5	5	3	1	5	3	5	**PUD	5	36	5	3	1	9	69	St. Joe Company	
17. FSU Intramural Adjacent	42	4	3	3	4	1	15	6	3	1	10	4	5	5	5	2	5	5	3	M-1	5	39	5	3	5	13	77	Leon County	active, highly utilized borrow pit, poorly drained soils (flooding), Debris Mangmnt Plan
18. Messer Park Expansion	27.4	6	1	3	3	5	18	8	3	2	13	3	5	3	5	5	5	3	M-1	5	39	3	3	3	9	79	COT/Leon County/Susan Tully, et. al.		
19. Northwood Center	24	8	5	3	2	5	23	10	5	3	18	5	5	3	3	5	5	5	AC	5	41	1	5	1	7	89	Northwood Associates LLC	existing tenants, property not currently available	
20. Capital Cir. NW / Hwy 90 (Tax World)	24	8	5	1	3	5	22	10	3	1	14	5	5	5	3	4	5	5	AC	5	42	3	5	1	9	87	Wells Fargo, Capital Center Investors	require demolition, Lake Munson drainage basin - flooding and stormwater issues	
21. Downtown	5.3	6	4	5	3	5	23	10	5	3	18	4	5	5	5	5	5	1	ASN-D	5	40	1	5	3	9	90	COT CRA	potential collaboration w/ Convention Cntr. proposal	

*Further investigation necessary

**Assumes active recreation, retail, and Hotel are allowable uses wthin PUD/CPA

Note: The data provided for site features evaluation is taken from GIS data provided by the County. While certain characteristics are more specific than others, it is recommended that in order to fully understand the actual site characteristics, further investigation will be required.

Table 17 – Fieldhouse Evaluation Matrix

Potential Sites - Lacrosse / Soccer / Multi-use	Total Acreage (+/-)	Connectivity			Subtotal	Proximity			Subtotal	Site Data							Subtotal	Econ. Dev.			Subtotal	Total	Ownership	Comments															
		I-10 (Interchange)	Major Roadways	Adjacency to Multi-Modal District / Mass Transit	Airport	Walkable/bikeable (sidewalks, trails)	Hotels	Retail (Restaurants/Entertainment) - Regional Districts	Hospitals	Topo	Vegetation (in or impacts Conservation lands)	Hydrology/Wetlands	*Development Constraints (Env. Issues, Brownfield, Urban Redv., USA limits, etc.)	Soils	Existing Land Use	Adjacent Land Use	Zoning (appropriate category)	Existing Infrastructure (Utilities)	Potential for New Development	Potential to enhance existing neighborhood	Ownership																		
1. Southwood	3,937	2	4	1	2	3			12	8	4	2									14	4	3	3	3	4	5	5	**R,CPA,PUD	3	35	5	3	1	9	70	St. Joe Company	partially outside USA limits	
2. Southeast Side	2,275	2	5	1	3	5			16	6	2	1									9	5	5	3	3	1	5	5	**CPA,R-3,R,PUD	5	37	5	1	1	7	69	St. Joe Company	partially outside USA limits	
3. Orange Ave / Blairstone Rd	995	2	4	3	3	5			17	6	3	2									11	3	3	3	5	5	5	3	*CPA	3	35	3	3	1	7	70	English Family	selected for Veterans Affair Clinic	
4. Welaunee Heel	892	10	5	1	1	3			20	10	2	2									14	5	5	3	5	5	5	5	**CPA	5	43	5	1	1	7	84	Powerhouse Inc.	part of CAP - may require comp plan change	
6. Welaunee Toe Phase 1	505	6	2	1	2	3			14	8	3	4									15	4	3	5	5	5	5	5	**PUD	5	42	5	1	1	7	78	CNL, Toe2		
7. Welaunee Toe Phase 2	429	8	1	1	2	3			15	6	3	3									12	5	5	5	5	5	5	5	**CPA	3	43	5	1	3	9	79	COT		
8. FallsChase	373	6	4	1	2	3			16	6	3	3									12	2	5	5	5	5	5	5	**PUD,R-2	5	42	3	5	1	9	79	Redus Fallschase	cost encumbrance	
9. I-10 / Capital Cir. NW (Park Place)	302	10	5	1	3	1			20	8	3	1									12	5	5	1	5	2	5	5	**PUD	3	36	5	3	1	9	77	Cap. Circle Devlpmnt, High Ground Investments, Shallow Lake Partners, North 10 Capital Assoc.		
10. Airport Adjacent 1	226	4	5	1	4	1			15	6	3	1									10	4	5	1	5	1	5	5	**PUD,M-1,OS	5	36	5	3	3	11	72	COT, Blueprint 2000		
11. DeVoe Moore Properties	215	10	5	1	1	1			18	10	2	3									15	5	5	3	5	4	5	5	RA,IC,C-2	5	42	5	1	1	7	82	Various DeVoe Moore Enterprises	property not currently available	
12. Tallahassee Mall	189	8	5	3	2	5			23	10	5	3									18	5	5	3	1	3	5	3	AC	5	35	1	5	1	7	83	Stiles Farm LLC	legal encumbrance, existing ground leases	
13. Apalachee Regional	160	4	5	1	1	3			14	6	2	1									9	1	5	3	5	5	5	5	4	UF	3	36	5	1	5	11	70	Leon County	
15. Fairgrounds	90	2	5	5	3	5			20	6	3	2									11	5	5	5	3	5	5	5	**PUD,OS,OR-2	5	42	5	5	5	15	88	Leon County	existing fairground uses displaces - relocate	

*Further investigation necessary

**Assumes active recreation, retail, and Hotel are allowable uses witin PUD/CPA

Note: The data provided for site features evaluation is taken from GIS data provided by the County. While certain characteristics are more specific than others, it is recommended that in order to fully understand the actual site characteristics, further investigation will be required.

Table 18 – Multi-Purpose Field Evaluation Matrix

7.9 Site Development Assumptions

Urban site:

- Approx 5 ac site
- 100,000 SF facility
 - 12 basketball courts that can be converted to 2 soccer/lacrosse fields, 16 volleyball courts, 10 wrestling mats, and 20 cheerleading court presentations areas. Portable floors, synthetic sports turf, wrestling mats, volleyball standards and nets
- Shared use parking (existing downtown parking garages) – a portion of parking on site with remainder off-site shared use.
- 100% developable
- Integrally connected to I-10, major roadways, multi-modal district, hotels, retail
- Greyfield (previously developed) site
- Supports enhancement of existing neighborhood
- Connection to existing utility infrastructure
- No zoning changes – assume Mixed Use Zoning
- Adjacent utilities
- No environmental issues (contamination)

Suburban site:

- Approx 30 ac site
- 100,000 SF facility
 - 12 basketball courts that can be converted to 2 soccer/lacrosse fields, 16 volleyball courts, 10 wrestling mats, and 20 cheerleading court presentations areas. Portable floors, all weather turf, wrestling mats, volleyball standards and nets
- Accommodate all parking (including overflow) on site
 - Parking spaces required:
 - Sporting tournament event parking –
 - Assume largest event is basketball tournament
 - Average tournament 48 teams (up to 72 teams)
 - 1/4 of teams from in town - 12 teams at 15 people/team, each with car = 180 spaces
 - 36 teams out of town – travel by van / bus, plus spectator cars = 36 bus spaces, 192 car spaces
 - Referees, admin, concessions, volunteers, etc. = 50 spaces
 - Health club component - 1 space/150 sf @ 7500 sf = 50 spaces
 - Total requirement = 472 spaces + 36 bus spaces
 - Includes spaces for overlap participants
 - Hardpave 50% with 50% overflow on gravel or grass pave
- 10% - 30% of site undevelopable (environmental constraints, i.e. wetlands, vegetation, etc.)
- Not highly connected to I-10, major roadways, multi-modal district, hotels, retail
- Greenfield (not previously developed) site

- Supports potential new development (hotel, commercial) either on site or adjacent
- Connection to existing utility infrastructure
 - Utilities along main road – would need to extend into site.
- Compatible zoning
- No environmental issues (contamination)

7.10 Site Development Prototype Diagrams

Taking into consideration the aforementioned assumptions, prototypical site development studies were developed for both urban and suburban sites.

The urban model (**Figure 43**) utilizes 100% of the site for development, accommodating the 100,000 SF fieldhouse and providing approximately 150 onsite parking spaces. It is the intent that users would utilize other parking venues throughout the downtown area and/or take advantage of public transit opportunities. The area allocated for onsite parking could accommodate a parking garage for increased parking capacity.

The suburban (**Figure 44**) model is broken out into two phases with Phase 1 containing the fieldhouse (approximately 100,000 SF) and associated hardpave parking (approximately 300 spaces), overflow parking/practice field (could accommodate approximately 200 parking spaces), and the stormwater management facility. Although not included in the opinion of probable cost (Section 7.11), the suburban model also includes Phase 2 amenities and three outparcel opportunities. With a larger tract of land, there exists the potential to incorporate additional outdoor multipurpose fields (two artificial turf fields that can accommodate both lacrosse and soccer championship games) and outparcels to support compatible commercial uses such as hotel/motel, restaurant, and/or retail centers.

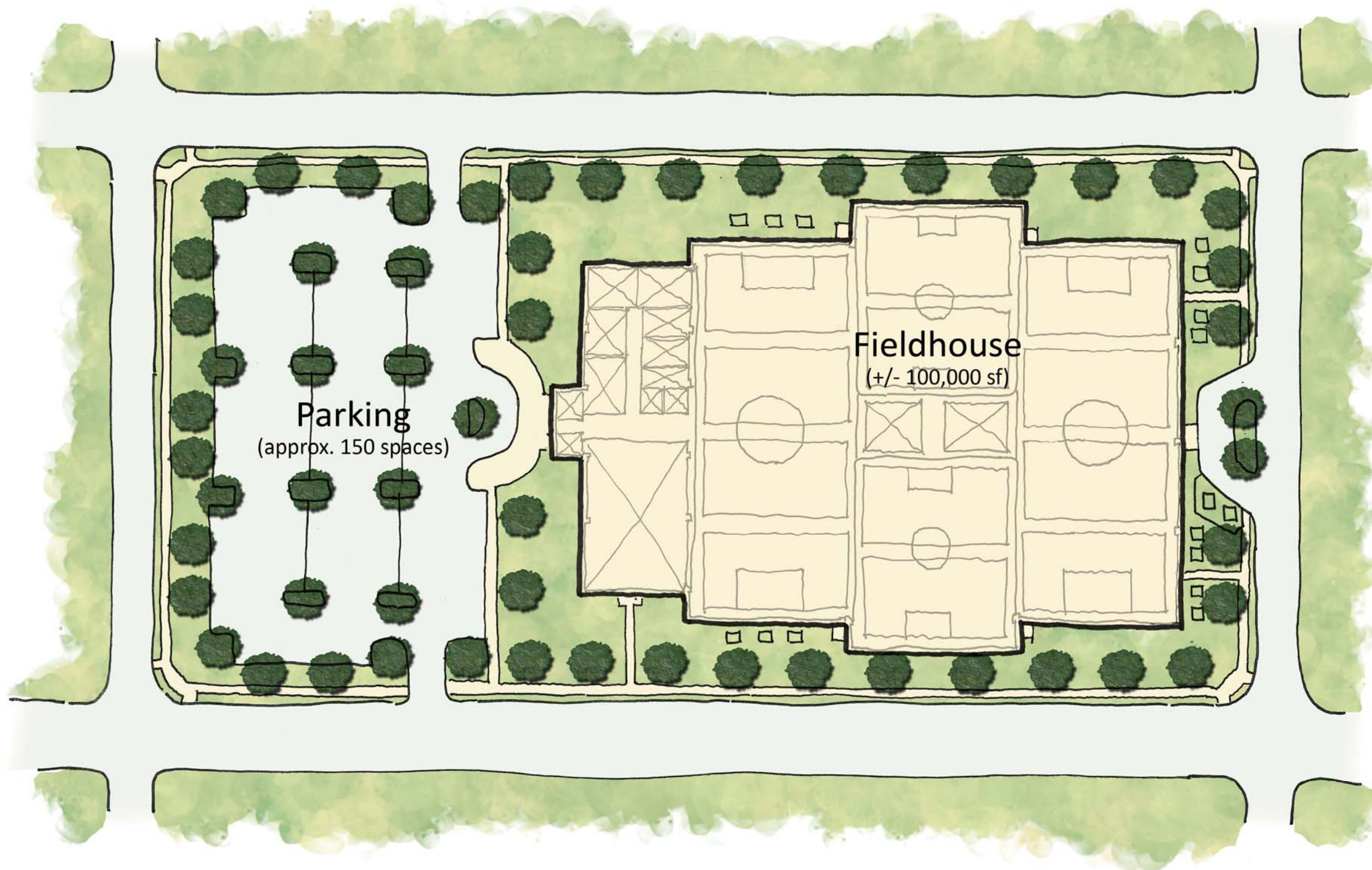


Figure 43 – Urban Fieldhouse Prototype
Scale: 1" = 60'

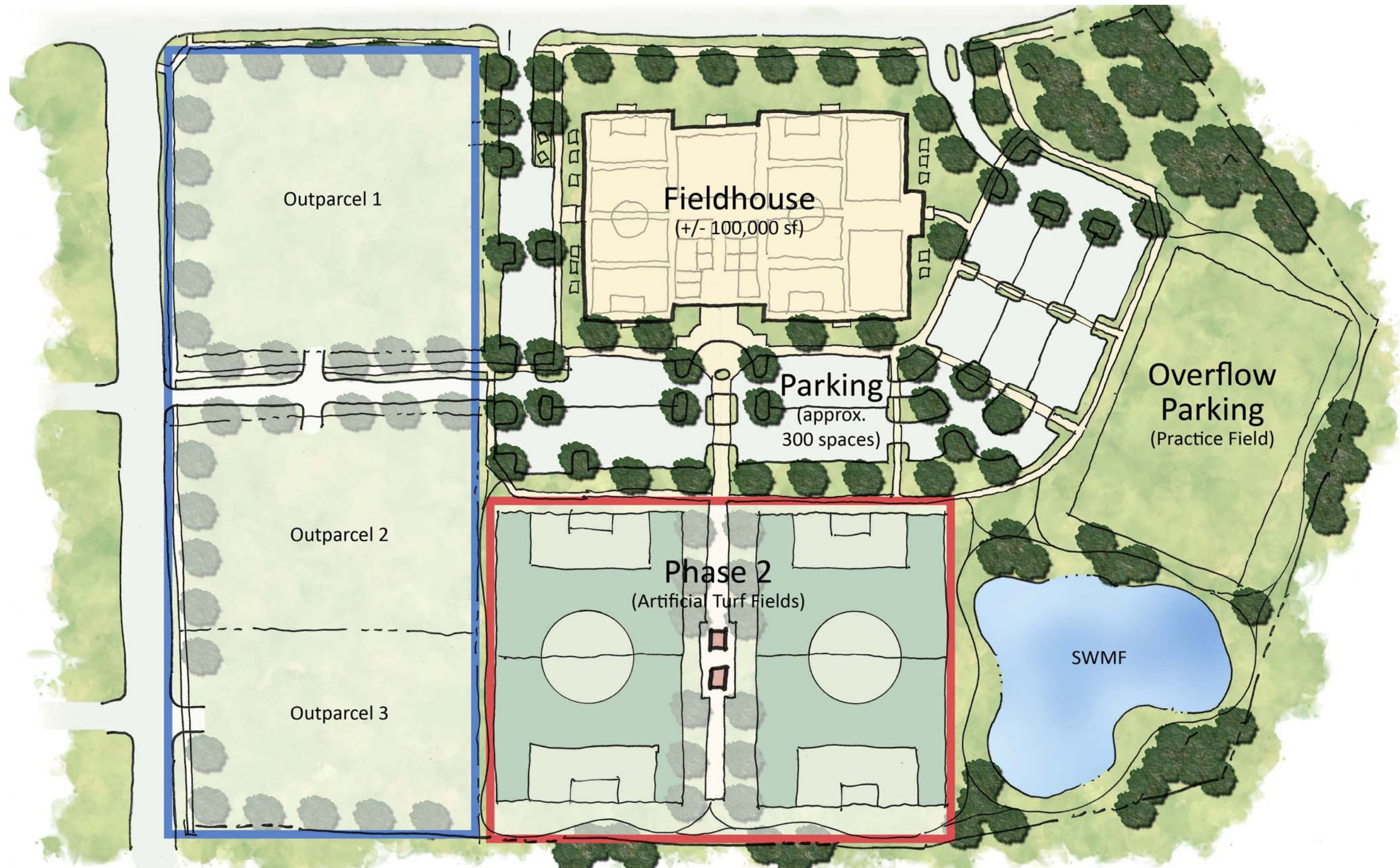


Figure 44 – Suburban Fieldhouse Prototype
Scale: 1" = 100'

7.11 Opinion of Probable Cost for Fieldhouse Options

The following construction cost information is being provided as a preliminary opinion of probable construction cost and is based on a variety of sources including historic cost data, Means cost data and gathered information from suppliers and contractors. Site construction costs and land sales will need to be adjusted following site selection and further evaluation of existing conditions. All estimate information is subject to change.

Table 19: Summary of Opinion of Probable Cost for Fieldhouse Options

DESCRIPTION	TOTAL	
	LOW	HIGH
	COST RANGE	
I. <u>Fieldhouse - Typical Urban Site (5.5 AC Site)</u>		
A. Site Preparation Subtotal	\$927,550.00	\$1,796,250.00
B. Drainage & Utilities	\$63,640.00	\$97,500.00
C. Hardscape & Amenities	\$198,200.00	\$282,000.00
D. Landscape	\$86,912.00	\$124,718.00
E. Structures	\$22,500,000.00	\$27,500,000.00
F. Land Costs	\$110,000.00	\$165,000.00
Fieldhouse - Typical Urban Site (5.5 AC Site) Subtotal:	\$23,886,302.00	\$29,965,468.00
15% Contingency	\$3,582,945.30	\$4,494,820.20
Fieldhouse - Typical Urban Site (5.5 AC Site) Total:	\$27,469,247.30	\$34,460,288.20
II. <u>Fieldhouse - Typical Suburban Site (28 AC Site)</u>		
A. Site Preparation Subtotal	\$1,132,000.00	\$2,050,000.00
B. Drainage & Utilities	\$203,480.00	\$294,200.00
C. Hardscape & Amenities	\$479,000.00	\$679,000.00
D. Landscape	\$183,990.00	\$272,760.00
E. Structures	\$22,500,000.00	\$27,500,000.00
F. Land Costs	\$224,000.00	\$336,000.00
Fieldhouse - Typical Suburban Site (28 AC Site) Subtotal:	\$24,722,470.00	\$31,131,960.00
15% Contingency	\$3,708,370.50	\$4,669,794.00
Fieldhouse - Typical Suburban Site (28 AC Site) Total:	\$28,430,840.50	\$35,801,754.00

NOTES:

1. The estimate is subject to change based on actual site conditions.
2. Estimates for construction do not include soft costs such as consultant fees, market studies, surveying, testing, etc.
3. Materials identified in estimate are intended for pricing purposes only. Materials may be substituted as the design develops. Structures estimate includes provision for FF+E.
4. This estimate does not include any required permitting fees, construction/contract administration fees, general conditions, or the cost of various bonds that may be required in the construction contract.
5. Estimate has been assembled using in house, supplier, Client provided costs, and Means cost data. Contractor pricing may vary as well as adjust suddenly due to unforeseen elements/conditions.

Table 20: Opinion of Probable Cost – Fieldhouse – Typical Urban Site (5.5 AC Site)

DESCRIPTION	QUANT.	UNIT	UNIT PRICE RANGE		TOTAL COST RANGE	
			LOW-MODERATE	MODERATE-HIGH	LOW-MODERATE	MODERATE-HIGH
A. Site Preparation and Earthwork						
1 Mass Grading	100000.00	CY	\$8.00	\$16.00	\$800,000.00	\$1,600,000.00
2 Fine Grading	5.50	AC	\$8,500.00	\$10,000.00	\$46,750.00	\$55,000.00
3 Erosion Control	5.50	AC	\$5,600.00	\$7,500.00	\$30,800.00	\$41,250.00
4 Mobilization	1	SITE	\$50,000.00	\$100,000.00	\$50,000.00	\$100,000.00
Site Preparation and Earthwork Subtotal:					\$927,550.00	\$1,796,250.00
B. Drainage & Utilities						
1 Storm Drainage (Pond)	0	LS	\$200,000.00	\$300,000.00	\$0.00	\$0.00
2 Water Line Extension	60	LF	\$34.00	\$45.00	\$2,040.00	\$2,700.00
3 Fire Hydrant	2	FA	\$4,000.00	\$5,500.00	\$8,000.00	\$11,000.00
4 Sanitary Extension	60	LF	\$30.00	\$50.00	\$1,800.00	\$3,000.00
5 Underground PWR/CATV/TELECO	1	LS	\$10,000.00	\$20,000.00	\$10,000.00	\$20,000.00
6 Outdoor Lighting (Pedestrian poles)	19	EA	\$2,200.00	\$3,200.00	\$41,800.00	\$60,800.00
Drainage & Utilities Subtotal:					\$63,640.00	\$97,600.00
C. Hardscape & Amenities						
1 Parking Lot	122	SP	\$1,100.00	\$1,500.00	\$134,200.00	\$183,000.00
2 4" Concrete Walks	14,500	SF	\$4.00	\$6.00	\$58,000.00	\$87,000.00
3 Benches	4	EA	\$1,000.00	\$2,000.00	\$4,000.00	\$8,000.00
4 Trash Receptacles	2	LS	\$1,000.00	\$2,000.00	\$2,000.00	\$4,000.00
Hardscape & Amenities Subtotal:					\$198,200.00	\$282,000.00
D. Landscape						
1 Palms	33	EA	\$350.00	\$500.00	\$11,550.00	\$16,500.00
2 Large Tree	29	EA	\$250.00	\$350.00	\$7,250.00	\$10,150.00
3 Ornamental Trees / Lg Shrubs	116	EA	\$225.00	\$300.00	\$26,100.00	\$34,800.00
4 Small Shrub + Ground Cover 3 gal	10,000	SF	\$3.00	\$4.50	\$30,000.00	\$45,000.00
5 Grass (Sod)	10,000	SF	\$0.25	\$0.40	\$2,500.00	\$4,000.00
6 Mulch (Pinestraw)	10,600	SF	\$0.12	\$0.18	\$1,272.00	\$1,908.00
7 Irrigation (mulch S.F.)	20,600	SF	\$0.40	\$0.60	\$8,240.00	\$12,360.00
Landscape Subtotal:					\$86,912.00	\$124,718.00
E. Buildings + Structures						
1 Fieldhouse	100000	SF	\$225.00	\$275.00	\$22,500,000.00	\$27,500,000.00
Buildings + Structures Subtotal:					\$22,500,000.00	\$27,500,000.00
F. Land Cost						
1 5.5-acre site (100% developable)	5.5	AC	\$20,000.00	\$30,000.00	\$110,000.00	\$165,000.00
Land Cost Subtotal:					\$110,000.00	\$165,000.00
Fieldhouse Subtotal:					\$23,886,302.00	\$29,965,468.00
					15% CONTINGENCY	\$3,582,945.30
					TOTAL	\$27,469,247.30
						\$34,469,247.30

NOTES:

- The estimate is subject to change based on actual site conditions.
- Estimates for construction do not include soft costs such as consultant fees, market studies, surveying, testing, etc.
- Materials identified in estimate are intended for pricing purposes only. Materials may be substituted as the design develops. Structures estimate includes provision for FF+E.
- This estimate does not include any required permitting fees, construction/contract administration fees, general conditions, or the cost of various bonds that may be required in the construction contract.
- Estimate has been assembled using in house, supplier, Client provided costs, and Means cost data. Contractor pricing may vary as well as adjust suddenly due to unforeseen elements/conditions.

Table 21: Opinion of Probable Cost – Fieldhouse – Typical Suburban Site (28 AC Site)

DESCRIPTION	QUANT.	UNIT	UNIT PRICE RANGE		TOTAL COST RANGE	
			LOW-MODERATE	MODERATE-HIGH	LOW-MODERATE	MODERATE-HIGH
A. Site Preparation and Earthwork						
1 Mass Grading	100000.00	CY	\$8.00	\$16.00	\$800,000.00	\$1,600,000.00
2 Fine Grading	20.00	AC	\$8,500.00	\$10,000.00	\$170,000.00	\$200,000.00
3 Erosion Control	20.00	AC	\$5,600.00	\$7,500.00	\$112,000.00	\$150,000.00
4 Mobilization and General Conditions (7% of total)	1	SITE	\$50,000.00	\$100,000.00	\$50,000.00	\$100,000.00
Site Preparation and Earthwork Subtotal:					\$1,132,000.00	\$2,050,000.00
B. Drainage & Utilities						
1 Storm Drainage (Pond)	1	LS	\$125,000.00	\$175,000.00	\$125,000.00	\$175,000.00
2 Water Line Extension	120	LF	\$34.00	\$45.00	\$4,080.00	\$5,400.00
3 Fire Hydrant	2	EA	\$4,000.00	\$5,500.00	\$8,000.00	\$11,000.00
4 Sanitary Extension	120	LF	\$30.00	\$50.00	\$3,600.00	\$6,000.00
5 Underground PWR/CATV/TELECO	1	LS	\$10,000.00	\$20,000.00	\$10,000.00	\$20,000.00
6 Outdoor Lighting (Parking Lot / Pedestrian poles)	24	EA	\$2,200.00	\$3,200.00	\$52,800.00	\$76,800.00
Drainage & Utilities Subtotal:					\$203,480.00	\$294,200.00
C. Hardscape & Amenities						
1 Parking Lot	200	SP	\$1,100.00	\$1,500.00	\$319,000.00	\$435,000.00
2 4" Concrete Walks	38,000	SF	\$4.00	\$6.00	\$152,000.00	\$228,000.00
3 Benches	6	EA	\$1,000.00	\$2,000.00	\$6,000.00	\$12,000.00
4 Trash Receptacles	2	LS	\$1,000.00	\$2,000.00	\$2,000.00	\$4,000.00
Hardscape & Amenities Subtotal:					\$479,000.00	\$679,000.00
D. Landscape						
1 Palms	16	EA	\$350.00	\$500.00	\$5,600.00	\$8,000.00
2 Large Tree	66	EA	\$250.00	\$350.00	\$16,500.00	\$23,100.00
3 Ornamental Trees / Lg Shrubs	125	EA	\$225.00	\$300.00	\$28,125.00	\$37,500.00
4 Small Shrub + Ground Cover 3 gal	12,000	SF	\$3.00	\$4.50	\$36,000.00	\$54,000.00
5 Grass (Sod)	140,500	SF	\$0.25	\$0.40	\$35,125.00	\$56,200.00
6 Mulch (Pinestraw)	12,000	SF	\$0.12	\$0.18	\$1,440.00	\$2,160.00
7 Irrigation (mulch S.F.)	153,000	SF	\$0.40	\$0.60	\$61,200.00	\$91,800.00
Landscape Subtotal:					\$183,990.00	\$272,760.00
E. Buildings + Structures						
1 Fieldhouse	100000	SF	\$225.00	\$275.00	\$22,500,000.00	\$27,500,000.00
Buildings + Structures Subtotal:					\$22,500,000.00	\$27,500,000.00
F. Land Cost						
1 28-acre site (70 - 90% developable)	28	AC	\$8,000.00	\$12,000.00	\$224,000.00	\$336,000.00
Land Cost Subtotal:					\$224,000.00	\$336,000.00
Fieldhouse Subtotal:					\$24,722,470.00	\$31,131,960.00
					16% CONTINGENCY	\$3,708,370.50
					TOTAL	\$28,430,840.50

NOTES:

- The estimate is subject to change based on actual site conditions.
- Estimates for construction do not include soft costs such as consultant fees, market studies, surveying, testing, etc.
- Materials identified in estimate are intended for pricing purposes only. Materials may be substituted as the design develops. Structures estimate includes provision for FF+E.
- This estimate does not include any required permitting fees, construction/contract administration fees, general conditions, or the cost of various bonds that may be required in the construction contract.
- Estimate has been assembled using in house, supplier, Client provided costs, and Means cost data. Contractor pricing may vary as well as adjust suddenly due to unforeseen elements/conditions.

7.12 Fieldhouse Case Study Imagery

Below are several pictorial examples of fieldhouses throughout the country that are of a similar size and scope as what is being recommended for Leon County.

Fieldhouse in Parker, Colorado - 100,000sf



McDermont Fieldhouse in Lindsay, California - 172,000sf



Fieldhouse at Virginia Beach, Virginia - 175,000sf



Chelsea Piers, New York - 80,000sf



Appendix A – Regional Sports Trend Analysis

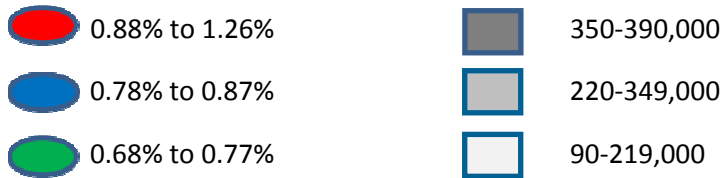
Softball (Fast Pitch)

Below is a map of the U.S. broken into regions, Florida being located in the South Atlantic Region. The map depicts participant levels for softball (fast pitch) by percentage to the total U.S. population and by number of participants ('000s).



Figure 45 - Fast Pitch Softball Participants by Region (Source - SGMA Participation Report)

% of total Population Participating and the total # of Participants in 000's



The following chart depicts the frequency of participation in softball (fast pitch) by region. The last column (index vs. total population) represents how each region is compared to the national level of participation. Numbers below 100 would represent a lower than average participation rate and numbers above 100 would represent higher than average participation rate. **The South Atlantic Region is below the national average in every category except for Frequent Participants (52+ times/year) which shows that Fast Pitch Softball for Select Teams is the highest in the U. S in terms of total number of participates and segment percentage of the population.**

	Total # of Part. (000s)	Segment %	Participation Rate by Group	Index vs. Total Population
Total Fast Pitch Softball Participants (1+ times/year)				
New England	94	3.9%	0.7%	81
Middle Atlantic	310	12.9%	0.8%	96
East North Central	380	15.8%	0.9%	103
West North Central	230	9.6%	1.2%	143
South Atlantic	382	15.9%	0.7%	82
East South Central	216	9.0%	1.3%	150
West South Central	250	10.4%	0.8%	92
Mountain	182	7.6%	0.9%	107
Pacific	357	14.9%	0.8%	95
Casual Fast Pitch Softball Participants (1-25 times/year)				
New England	42	3.4%	0.3%	71
Middle Atlantic	211	17.1%	0.5%	127
East North Central	166	13.4%	0.4%	87
West North Central	139	11.2%	0.7%	168
South Atlantic	188	15.3%	0.3%	78
East South Central	47	3.8%	0.3%	63
West South Central	122	9.9%	0.4%	87
Mountain	109	8.8%	0.5%	124
Pacific	212	17.1%	0.5%	109
Regular Fast Pitch Softball Participants (26-51 times/year)				
New England	52	11.1%	0.4%	231
Middle Atlantic	68	14.4%	0.2%	107
East North Central	84	17.8%	0.2%	115
West North Central	16	3.3%	0.1%	50
South Atlantic	42	9.0%	0.1%	46
East South Central	82	17.5%	0.5%	291
West South Central	19	4.0%	0.1%	36
Mountain	5	1.0%	0.0%	14
Pacific	103	21.9%	0.2%	140
Frequent Fast Pitch Softball Participants (52+ times/year)				
New England	4	0.6%	0.0%	12
Middle Atlantic	48	6.9%	0.1%	51
East North Central	124	17.8%	0.3%	115
West North Central	77	11.0%	0.4%	164
South Atlantic	143	20.6%	0.3%	105
East South Central	75	10.8%	0.4%	179
West South Central	102	14.7%	0.3%	130
Mountain	67	9.7%	0.3%	136
Pacific	56	8.1%	0.1%	52
* Participation figures in thousands (Source SGMA Research)				

Baseball

Below is a map of the U.S. broken into regions, Florida being located in the South Atlantic Region. The map depicts participant levels for baseball by percentage to the total U.S. population and by number of participants ('000s).

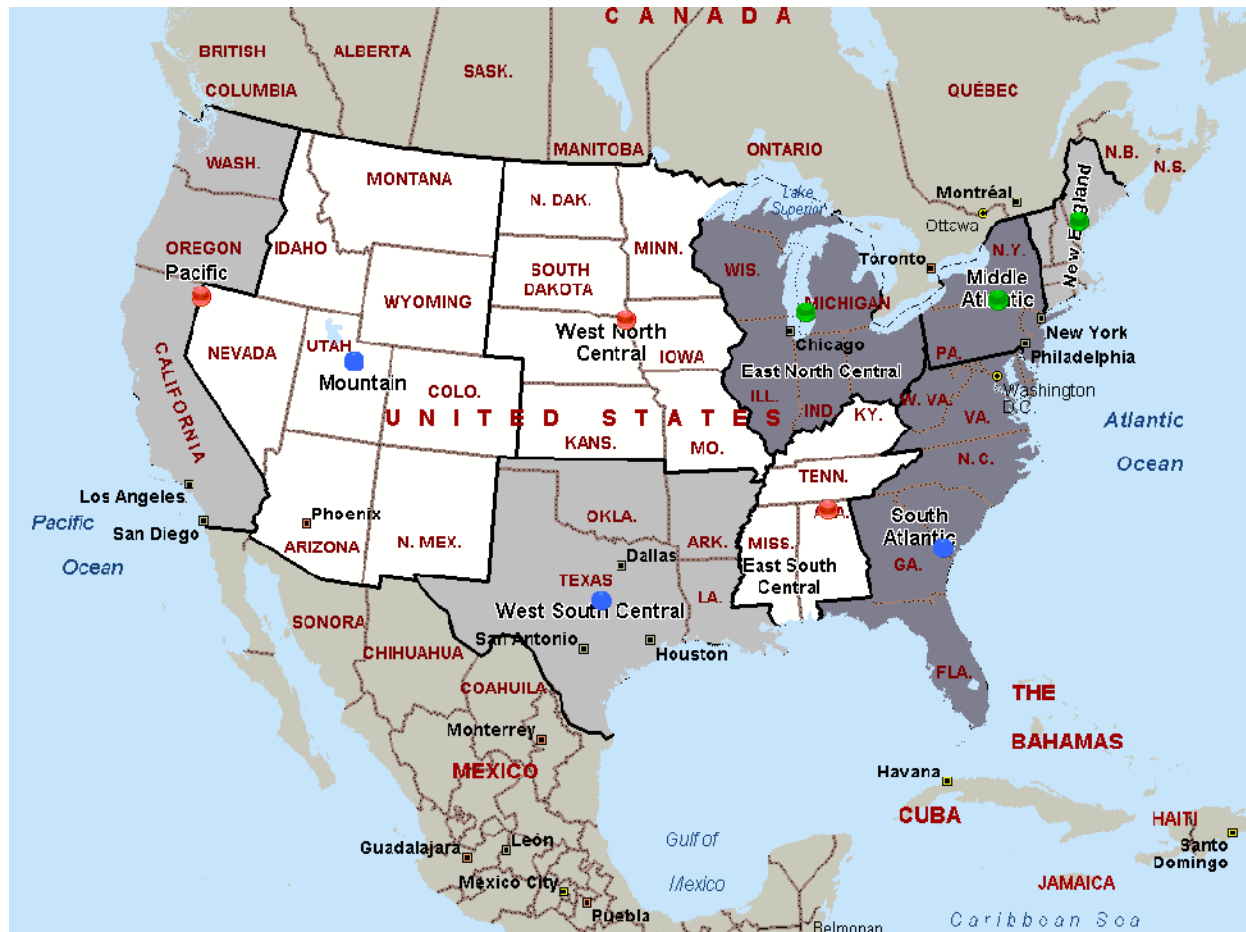
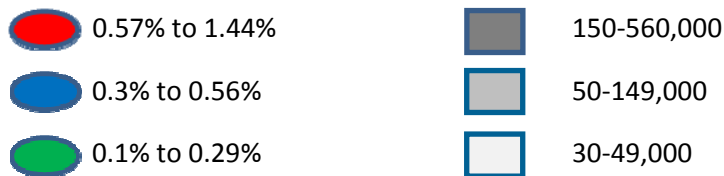


Figure 46 - Baseball Participants by Region (Source - SGMA Participation Report)

% of Total Population Participating and the total # of Participants in 000's



The following chart depicts the frequency of participation in baseball by region. The last column (index vs. total population) represents how each region is compared to the national level of participation. Numbers below 100 would represent a lower than average participation rate and numbers above 100 would represent higher than average participation rate. **The South Atlantic Region is below the national average in every category.**

	Total # of Part. (000s)	Segment %	Participation Rate by Group	Index vs. Total Population
Total Baseball Participants (1+ times/year)				
New England	1027	7.1%	7.5%	147
Middle Atlantic	2294	15.8%	6.0%	117
East North Central	2664	18.3%	6.1%	119
West North Central	981	6.4%	4.9%	95
South Atlantic	2351	16.1%	4.2%	83
East South Central	935	6.4%	5.5%	107
West South Central	1163	8.0%	3.6%	71
Mountain	952	6.5%	4.7%	92
Pacific	2248	15.4%	5.0%	98
Casual Baseball Participants (1-12 times/year)				
New England	298	6.1%	2.2%	128
Middle Atlantic	791	16.3%	2.1%	121
East North Central	867	17.9%	2.0%	116
West North Central	327	6.7%	1.7%	101
South Atlantic	796	16.4%	1.4%	84
East South Central	230	4.7%	1.4%	79
West South Central	465	9.6%	1.5%	85
Mountain	297	6.1%	1.5%	86
Pacific	786	16.2%	1.8%	103
Regular Baseball Participants (13-24 times/year)				
New England	114	4.9%	0.8%	102
Middle Atlantic	410	17.7%	1.1%	131
East North Central	602	26.0%	1.4%	169
West North Central	177	7.6%	0.9%	114
South Atlantic	295	12.7%	0.5%	65
East South Central	110	4.7%	0.6%	79
West South Central	102	4.4%	0.3%	39
Mountain	204	8.8%	1.0%	124
Pacific	303	13.1%	0.7%	83
Frequent Baseball Participants (25+ times/year)				
New England	615	8.3%	4.5%	173
Middle Atlantic	1094	14.8%	2.9%	110
East North Central	1188	16.1%	2.7%	104
West North Central	427	5.8%	2.2%	86
South Atlantic	1263	17.1%	2.3%	87
East South Central	595	8.1%	3.5%	134
West South Central	595	8.1%	1.9%	71
Mountain	452	6.1%	2.2%	86
Pacific	1159	15.7%	2.6%	100
* Participation figures in thousands (Source SGMA Research)				

Soccer (Outdoor)

Below is a map of the U.S. broken into regions, Florida being located in the South Atlantic Region. The map depicts participant levels for soccer (outdoor) by percentage to the total U.S. population and by number of participants ('000s).

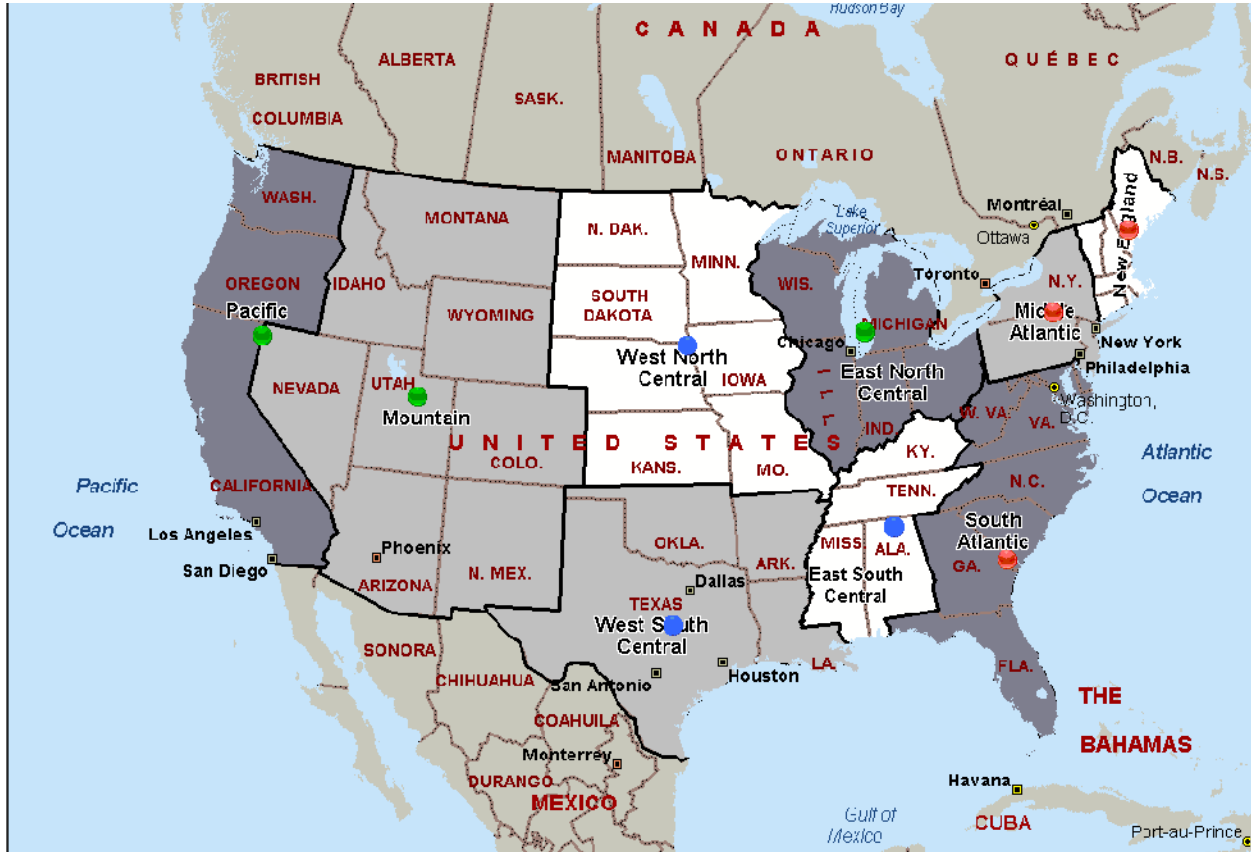
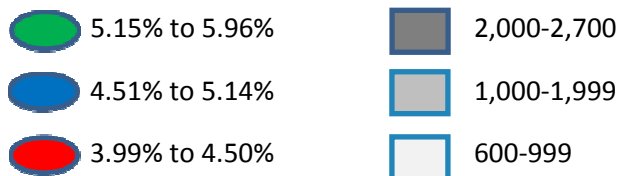


Figure 47 - Soccer (Outdoor) Participants by Region (Source - SGMA Participation Report)

% of Total Population Participating and the total # of Participants in 000's



The following chart depicts the frequency of participation in soccer (outdoor) by region. The last column (index vs. total population) represents how each region is compared to the national level of participation. Numbers below 100 would represent a lower than average participation rate and numbers above 100 would represent higher than average participation rate. **The South Atlantic Region is below the national average in every category except frequent participants (52+ times/year).**

	Total # of Part. (000s)	Segment %	Participation Rate by Group	Index vs. Total Population
Total Soccer (Outdoor) Participants (1+ times/year)				
New England	615	4.4%	4.5%	91
Middle Atlantic	1956	13.9%	5.1%	103
East North Central	352	16.7%	5.4%	109
West North Central	793	5.6%	4.2%	84
South Atlantic	2540	18.0%	4.6%	93
East South Central	680	4.8%	4.0%	81
West South Central	1444	10.3%	4.5%	91
Mountain	1043	7.4%	5.2%	104
Pacific	2653	18.8%	6.0%	120
Casual Soccer (Outdoor) Participants (1-25 times/year)				
New England	366	4.9%	2.7%	102
Middle Atlantic	1103	14.7%	2.9%	109
East North Central	1337	17.9%	3.1%	116
West North Central	458	6.1%	2.4%	91
South Atlantic	1313	17.5%	2.4%	90
East South Central	434	5.8%	2.5%	97
West South Central	716	9.6%	2.2%	85
Mountain	638	8.5%	3.2%	120
Pacific	1122	15.0%	2.5%	95
Regular Soccer (Outdoor) Participants (26-51 times/year)				
New England	126	3.6%	0.9%	74
Middle Atlantic	412	11.6%	1.1%	86
East North Central	699	19.7%	1.6%	128
West North Central	162	4.6%	0.9%	68
South Atlantic	599	16.9%	1.1%	87
East South Central	147	4.1%	0.9%	69
West South Central	356	10.0%	1.1%	89
Mountain	255	7.2%	1.3%	101
Pacific	788	22.2%	1.8%	142
Frequent Soccer (Outdoor) Participants (52 times/year)				
New England	123	4.0%	0.9%	84
Middle Atlantic	441	14.5%	1.2%	107
East North Central	316	10.4%	0.7%	67
West North Central	173	5.7%	0.9%	85
South Atlantic	628	20.6%	1.1%	106
East South Central	98	3.2%	0.6%	54
West South Central	372	12.2%	1.2%	108
Mountain	150	4.9%	0.7%	69
Pacific	742	24.4%	1.7%	155
* Participation figures in thousands (Source SGMA Research)				

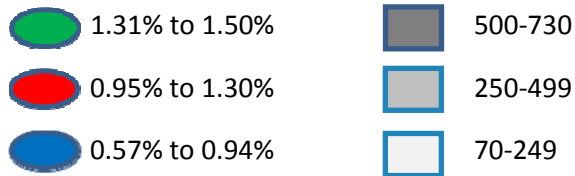
Cheerleading

Below is a map of the U.S. broken into regions, Florida being located in the South Atlantic Region. The map depicts participant levels for cheerleading by percentage to the total U.S. population and by number of participants ('000s).



Figure 48 - Cheerleading Participants by Region (Source - SGMA Participation Report)

% of Total Population Participating and the total # of Participants in 000's



The following chart depicts the frequency of participation in cheerleading by region. The last column (index vs. total population) represents how each region is compared to the national level of participation. Numbers below 100 would represent a lower than average participation rate and numbers above 100 would represent higher than average participation rate. **The South Atlantic Region is above the national average in every category except regular participants (26-51 times/year).**

	Total # of Part. (000s)	Segment %	Participation Rate by Group	Index vs. Total Population
Total Cheerleading Participants (1+ times/year)				
New England	78	2.4%	0.6%	50
Middle Atlantic	549	17.0%	1.4%	126
East North Central	569	17.6%	1.3%	114
West North Central	173	5.4%	0.9%	80
South Atlantic	728	22.5%	1.3%	116
East South Central	254	7.9%	1.5%	131
West South Central	366	11.3%	1.1%	100
Mountain	200	6.2%	1.0%	87
Pacific	316	9.8%	0.7%	62
Casual Cheerleading Participants (1-25 times/year)				
New England	41	2.5%	0.3%	51
Middle Atlantic	260	15.6%	0.7%	116
East North Central	293	17.6%	0.7%	114
West North Central	109	6.6%	0.6%	98
South Atlantic	358	21.5%	0.6%	110
East South Central	116	7.0%	70.0%	116
West South Central	180	10.8%	0.6%	96
Mountain	104	6.3%	0.5%	88
Pacific	203	12.2%	0.5%	78
Regular Cheerleading Participants (26-51 times/year)				
New England	16	2.8%	0.1%	57
Middle Atlantic	115	19.8%	0.3%	147
East North Central	93	16.0%	0.2%	104
West North Central	13	2.2%	0.1%	33
South Atlantic	109	18.8%	0.2%	96
East South Central	35	6.0%	0.2%	100
West South Central	89	15.3%	0.3%	136
Mountain	39	6.7%	0.2%	95
Pacific	71	12.2%	0.2%	78
Frequent Cheerleading Participants (52+ times/year)				
New England	21	2.1%	0.2%	44
Middle Atlantic	174	17.6%	0.5%	131
East North Central	183	18.5%	0.4%	120
West North Central	52	5.3%	0.3%	79
South Atlantic	261	26.4%	0.5%	136
East South Central	102	10.3%	0.6%	172
West South Central	96	9.7%	0.3%	86
Mountain	57	5.8%	0.3%	81
Pacific	42	4.3%	0.1%	27
* Participation figures in thousands (Source SGMA Research)				

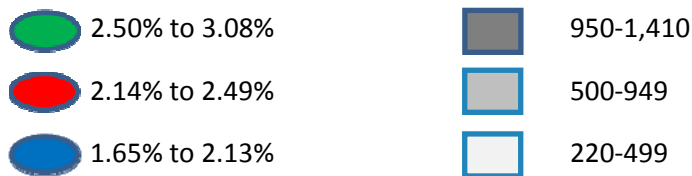
Football (Flag)

Below is a map of the U.S. broken into regions, Florida being located in the South Atlantic Region. The map depicts participant levels for football (flag) by percentage to the total U.S. population and by number of participants ('000s).



Figure 49 - Football (Flag) Participants by Region (Source - SGMA Participation Report)

% of Total Population Participating and the total # of Participants in 000's



The following chart depicts the frequency of participation in football (flag) by region. The last column (index vs. total population) represents how each region is compared to the national level of participation. Numbers below 100 would represent a lower than average participation rate and numbers above 100 would represent higher than average participation rate. **The South Atlantic Region is above the national average in every category.**

	Total # of Part. (000s)	Segment %	Participation Rate by Group	Index vs. Total Population
Total Football (Flag) Participants (1+ times/year)				
New England	226	3.3%	1.7%	70
Middle Atlantic	821	12.1%	2.1%	90
East North Central	959	14.2%	2.2%	92
West North Central	400	5.9%	2.1%	88
South Atlantic	1410	20.8%	2.5%	107
East South Central	347	5.1%	2.0%	85
West South Central	914	13.5%	2.9%	120
Mountain	620	9.2%	3.1%	129
Pacific	1071	15.8%	2.4%	101
Casual Football (Flag) Participants (1-12 times/year)				
New England	171	4.6%	1.3%	96
Middle Atlantic	439	11.9%	1.1%	88
East North Central	510	13.8%	1.2%	90
West North Central	255	6.9%	1.3%	103
South Atlantic	753	20.4%	1.4%	105
East South Central	202	5.5%	1.2%	91
West South Central	521	14.1%	1.6%	125
Mountain	313	8.5%	1.6%	119
Pacific	530	14.3%	1.2%	91
Regular Football (Flag) Participants (13-24 times/year)				
New England	41	3.3%	0.3%	70
Middle Atlantic	159	13.0%	40.0%	96
East North Central	208	17.0%	50.0%	110
West North Central	88	7.2%	0.5%	107
South Atlantic	274	22.3%	0.5%	115
East South Central	56	4.6%	0.3%	76
West South Central	80	6.5%	0.2%	58
Mountain	137	11.2%	0.7%	157
Pacific	183	14.9%	0.4%	95
Frequent Football (Flag) Participants (25+ times/year)				
New England	13	0.7%	0.1%	15
Middle Atlantic	223	12.1%	0.6%	89
East North Central	241	13.1%	0.6%	85
West North Central	57	3.1%	0.3%	46
South Atlantic	383	20.7%	0.7%	106
East South Central	89	4.8%	0.5%	80
West South Central	313	17.0%	1.0%	150
Mountain	169	9.2%	0.8%	129
Pacific	358	19.4%	0.8%	124
* Participation figures in thousands (Source SGMA Research)				

Lacrosse

Below is a map of the U.S. broken into regions, Florida being located in the South Atlantic Region. The map depicts participant levels for lacrosse by percentage to the total U.S. population and by number of participants ('000s).

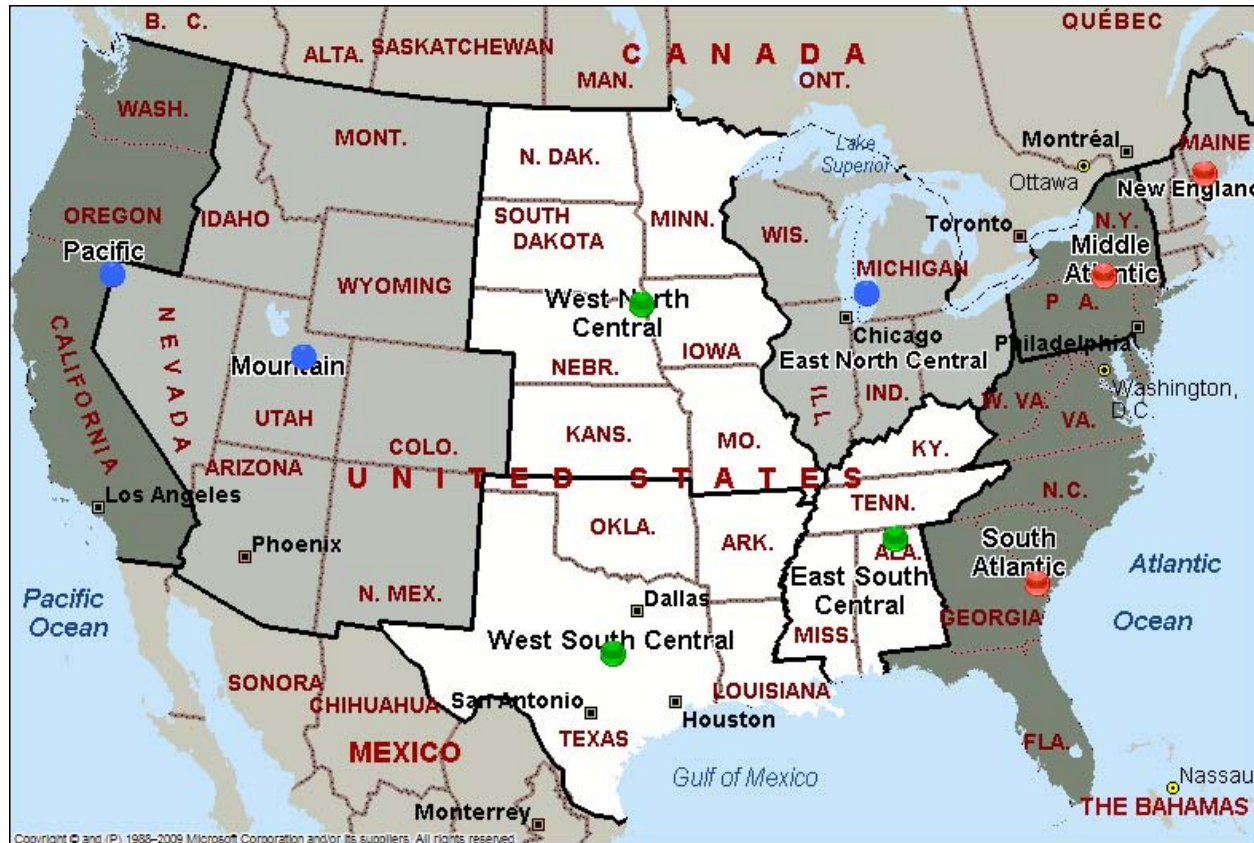
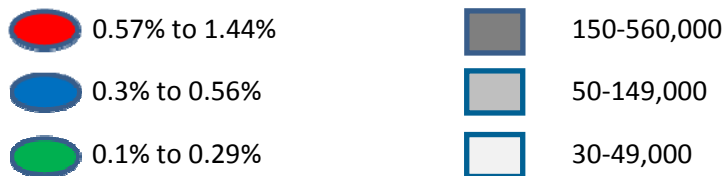


Figure 50 - Lacrosse Participants by Region (Source - SGMA Participation Report)

% of Total Population Participating and the total # of Participants in 000's



The following chart depicts the frequency of participation in lacrosse by region. The last column (index vs. total population) represents how each region is compared to the national level of participation. Numbers below 100 would represent a lower than average participation rate and numbers above 100 would represent higher than average participation rate. **The South Atlantic Region is above the national average in every category except for Regular Participants (13-24 times/year). The region is second in total number of participants who play the game more than 25+times a year which is a growing select team sport for this region of the United States.**

	Total # of Part. (000s)	Segment %	Participation Rate by Group	Index vs. Total Population
Total Lacrosse Participants (1+ times/year)				
New England	87	5.8%	0.6%	121
Middle Atlantic	558	37.2%	1.4%	275
East North Central	135	9.0%	0.3%	59
West North Central	35	2.4%	0.2%	35
South Atlantic	317	21.1%	0.6%	108
East South Central	47	3.1%	0.3%	52
West South Central	34	2.3%	0.1%	20
Mountain	114	7.6%	0.6%	107
Pacific	173	11.5%	0.4%	73
Casual Lacrosse Participants (1-12 times/year)				
New England	48	6.9%	0.4%	143
Middle Atlantic	196	27.9%	0.5%	207
East North Central	52	7.4%	0.1%	48
West North Central	26	3.7%	0.1%	56
South Atlantic	156	22.2%	0.3%	114
East South Central	7	1.0%	0.0%	17
West South Central	26	3.7%	0.1%	32
Mountain	74	10.5%	0.4%	148
Pacific	117	16.7%	0.3%	106
Regular Lacrosse Participants (13-24 times/year)				
New England	0	0.0%	0.0%	0
Middle Atlantic	106	71.9%	0.3%	532
East North Central	16	10.6%	0.0%	69
West North Central	7	5.0%	0.0%	75
South Atlantic	18	12.5%	0.0%	64
East South Central	0	0.0%	0.0%	0
West South Central	0	0.0%	0.0%	0
Mountain	0	0.0%	0.0%	0
Pacific	0	0.0%	0.0%	0
Frequent Lacrosse Participants (25+ times/year)				
New England	36	5.6%	0.3%	116
Middle Atlantic	271	41.5%	0.7%	308
East North Central	68	10.5%	0.2%	68
West North Central	3	0.4%	0.0%	7
South Atlantic	140	21.4%	0.3%	110
East South Central	38	5.8%	0.2%	97
West South Central	8	1.2%	0.0%	10
Mountain	38	5.8%	0.2%	81
Pacific	51	7.8%	0.1%	50

* Participation figures in thousands (Source SGMA Research)

Rugby

Below is a map of the U.S. broken into regions, Florida being located in the South Atlantic Region. The map depicts participant levels for rugby by percentage to the total U.S. population and by number of participants ('000s).

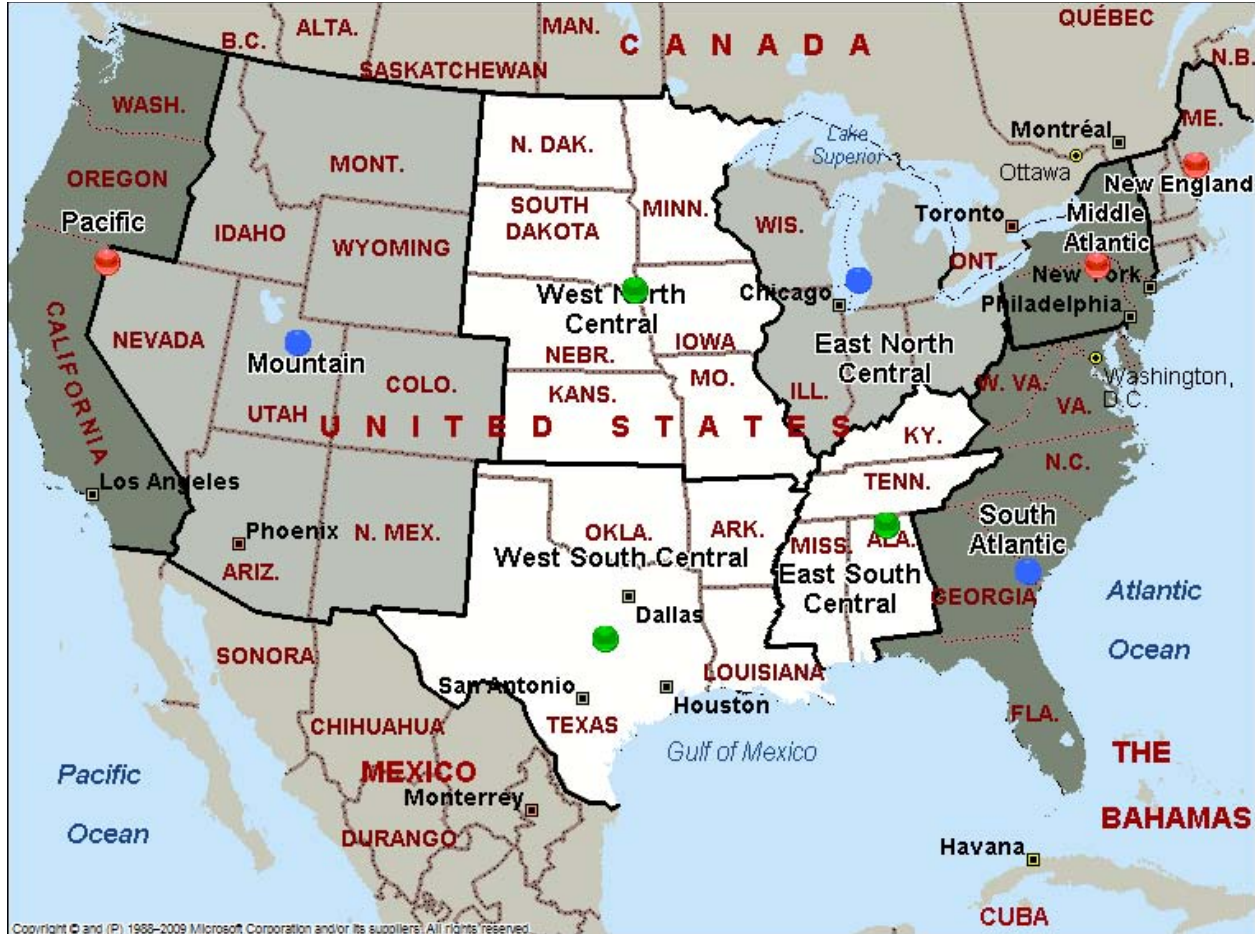
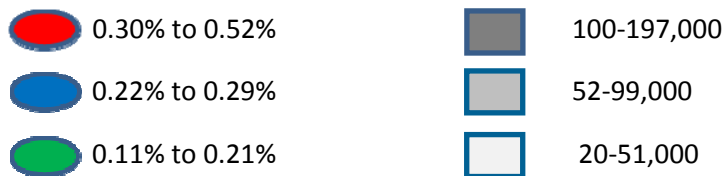


Figure 51 - Rugby Participants by Region (Source - SGMA Participation Report)

% of Total Population Participating and the total # of Participants in 000's



The following chart depicts the frequency of participation in rugby by region. The last column (index vs. total population) represents how each region is compared to the national level of participation. Numbers below 100 would represent a lower than average participation rate and numbers above 100 would represent higher than average participation rate. **The South Atlantic Region is below the national average in every category except for Frequent Participants (15+ times/year) which indicate it is a growing sport in tournament type players at 93,000 in the South Atlantic area.**

	Total # of Part. (000s)	Segment %	Participation Rate by Group	Index vs. Total Population
Total Rugby Participants (1+ times/year)				
New England	52	6.1%	0.4%	127
Middle Atlantic	197	23.2%	0.5%	172
East North Central	98	11.6%	0.2%	75
West North Central	40	4.7%	0.2%	70
South Atlantic	140	16.5%	0.3%	84
East South Central	20	2.4%	0.1%	39
West South Central	51	6.0%	0.2%	53
Mountain	56	6.6%	0.3%	93
Pacific	196	23.0%	0.4%	147
Casual Rugby Participants (1-7 times/year)				
New England	46	8.4%	0.3%	176
Middle Atlantic	176	32.4%	0.5%	240
East North Central	61	11.3%	0.1%	73
West North Central	12	2.3%	0.1%	34
South Atlantic	31	5.7%	0.1%	29
East South Central	9	1.7%	0.1%	28
West South Central	38	7.0%	0.1%	62
Mountain	48	8.8%	0.2%	124
Pacific	122	22.5%	0.3%	143
Regular Rugby Participants (8-14 times/year)				
New England	0	0.0%	0.0%	0
Middle Atlantic	15	19.2%	0.0%	142
East North Central	25	31.3%	0.1%	203
West North Central	0	0.0%	0.0%	0
South Atlantic	10	12.0%	0.0%	61
East South Central	0	0.0%	0.0%	0
West South Central	8	10.1%	0.0%	89
Mountain	0	6.6%	0.0%	93
Pacific	17	20.9%	0.0%	133
Frequent Rugby Participants (15+ times/year)				
New England	10	4.2%	0.1%	88
Middle Atlantic	14	6.0%	0.0%	45
East North Central	6	2.4%	0.0%	16
West North Central	27	12.0%	0.1%	180
South Atlantic	93	41.1%	0.2%	211
East South Central	11	5.0%	0.1%	83
West South Central	4	1.9%	0.0%	17
Mountain	5	2.1%	0.0%	29
Pacific	57	25.2%	0.1%	161
* Participation figures in thousands (Source SGMA Research)				

Volleyball (Court)

Below is a map of the U.S. broken into regions, Florida being located in the South Atlantic Region. The map depicts participant levels for volleyball (court) by percentage to the total U.S. population and by number of participants ('000s).

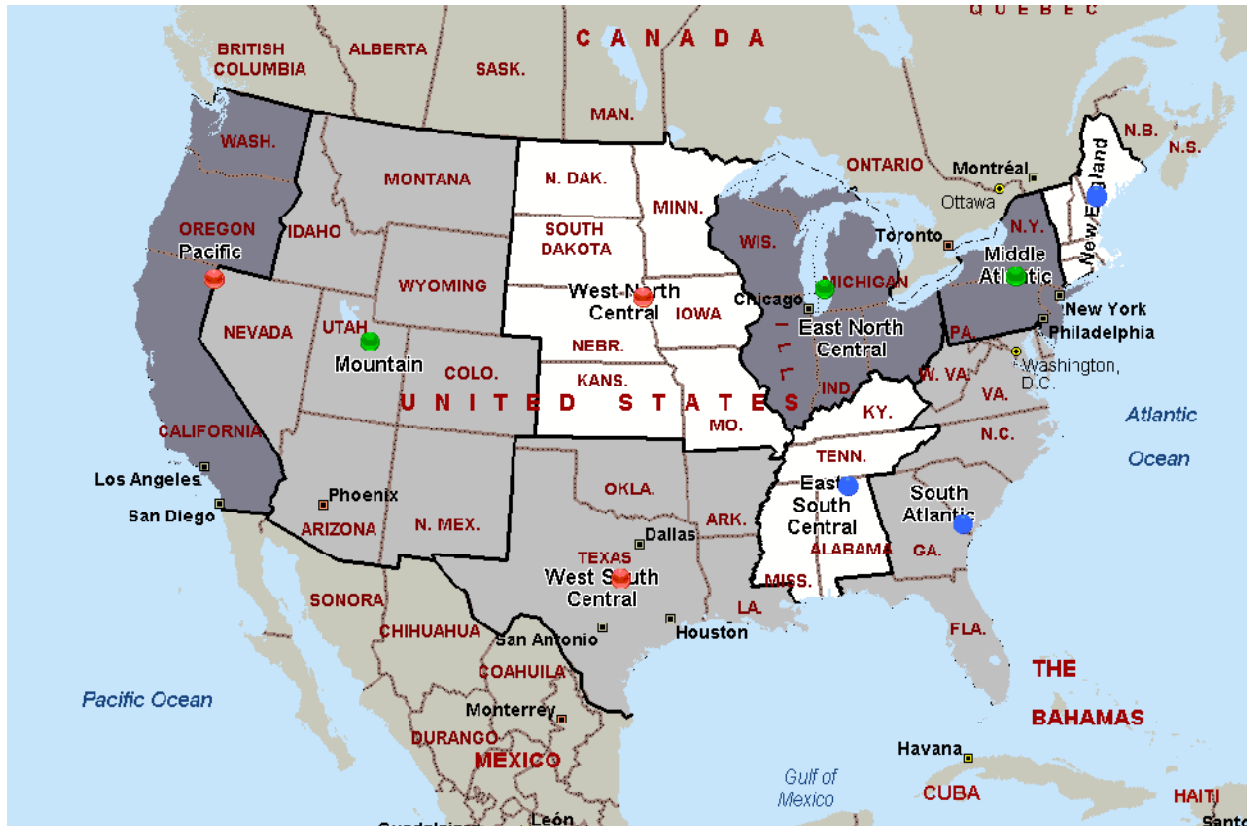


Figure 52 - Volleyball (Court) Participants by Region (Source - SGMA Participation Report)

% of Total Population Participating and the total # of Participants in 000's



The following chart depicts the frequency of participation in volleyball (court) by region. The last column (index vs. total population) represents how each region is compared to the national level of participation. Numbers below 100 would represent a lower than average participation rate and numbers above 100 would represent higher than average participation rate. **The South Atlantic Region is below the national average in every category. This could be low due to a lack of venues available in the region or a lack of focus from sports organizers to market and promote the sport. In any case, the sport is growing in popularity for both men and women.**

	Total # of Part. (000s)	Segment %	Participation Rate by Group	Index vs. Total Population
Total Volleyball (Court) Participants (1+ times/year)				
New England	211	2.9%	1.5%	60
Middle Atlantic	1128	15.4%	2.9%	114
East North Central	1439	19.6%	3.3%	127
West North Central	545	7.4%	2.9%	111
South Atlantic	1010	13.7%	1.8%	71
East South Central	330	4.5%	1.9%	75
West South Central	859	11.7%	2.7%	103
Mountain	26	9.9%	3.6%	139
Pacific	1099	15.0%	2.5%	95
Casual Volleyball (Court) Participants (1-12 times/year)				
New England	120	3.7%	0.9%	78
Middle Atlantic	566	17.6%	1.5%	130
East North Central	656	20.3%	1.5%	132
West North Central	189	5.9%	1.0%	88
South Atlantic	492	15.3%	0.9%	78
East South Central	92	2.9%	0.5%	48
West South Central	308	9.6%	1.0%	85
Mountain	375	11.6%	1.9%	164
Pacific	426	13.2%	1.0%	84
Regular Volleyball (Court) Participants (13-24 times/year)				
New England	40	3.5%	0.3%	74
Middle Atlantic	181	16.0%	0.5%	119
East North Central	175	15.5%	0.4%	101
West North Central	71	6.3%	0.4%	94
South Atlantic	98	8.7%	0.2%	45
East South Central	67	5.9%	0.4%	99
West South Central	205	18.2%	0.6%	161
Mountain	129	11.4%	0.6%	161
Pacific	162	14.3%	0.4%	91
Frequent Volleyball (Court) Participants (25+ times/year)				
New England	50	1.7%	0.4%	35
Middle Atlantic	380	12.7%	1.0%	94
East North Central	608	20.3%	1.4%	132
West North Central	285	9.5%	1.5%	142
South Atlantic	421	14.1%	0.8%	72
East South Central	170	5.7%	1.0%	95
West South Central	346	11.6%	1.1%	102
Mountain	222	7.4%	1.1%	104
Pacific	511	17.1%	1.1%	109
* Participation figures in thousands (Source SGMA Research)				

Basketball

Below is a map of the U.S. broken into regions, Florida being located in the South Atlantic Region. The map depicts participant levels for basketball by percentage to the total U.S. population and by number of participants ('000s).

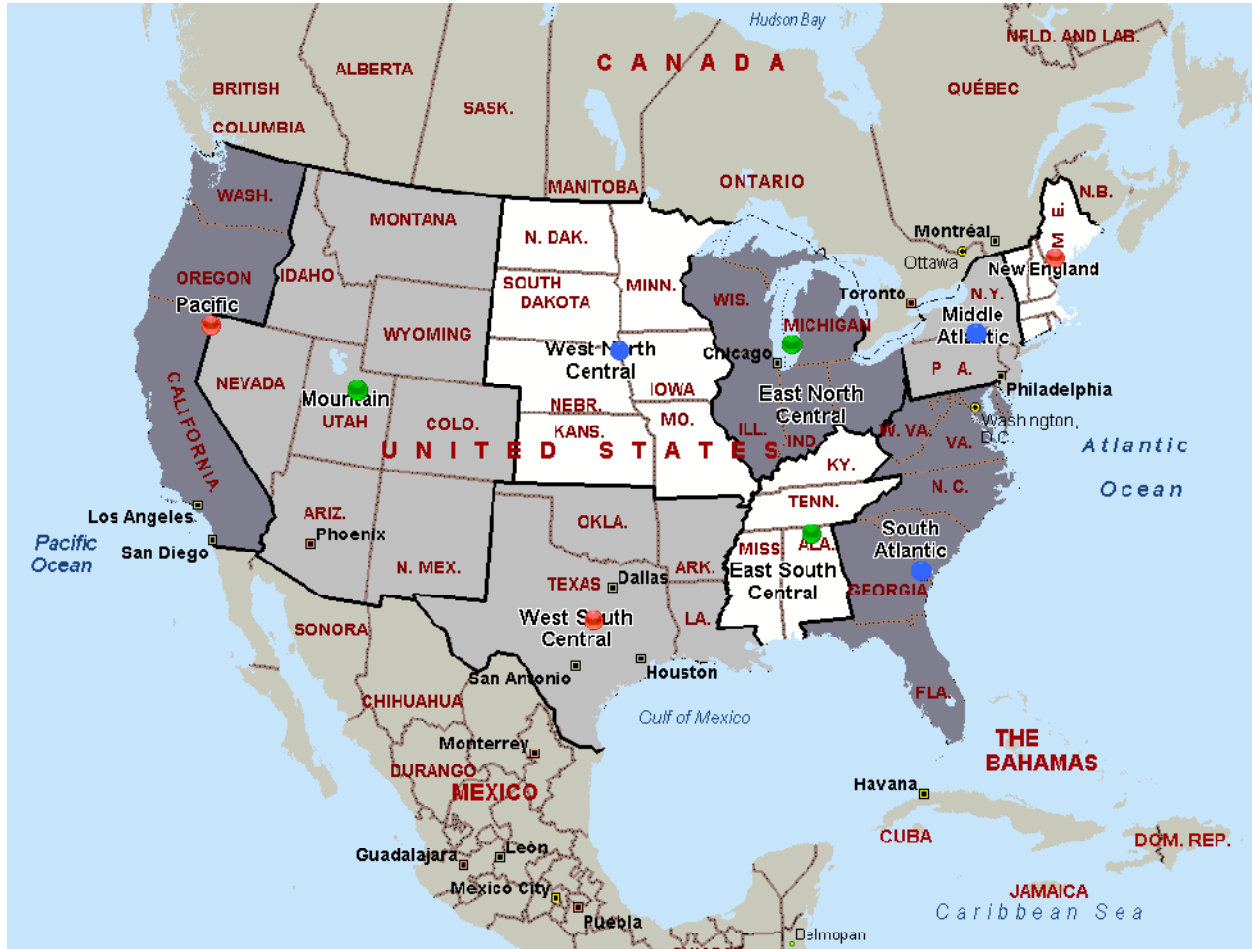


Figure 53 - Basketball Participants by Region (Source - SGMA Participation Report)

% of Total Population Participating and the total # of Participants in 000's



The following chart depicts the frequency of participation in basketball by region. The last column (index vs. total population) represents how each region is compared to the national level of participation. Numbers below 100 would represent a lower than average participation rate and numbers above 100 would represent higher than average participation rate. **The South Atlantic Region is below the national average in every category except frequent participant (25+ times/year) which demonstrates a strong number of participants (over 2,665,000) that play team and tournament basketball.**

	Total # of Part. (000s)	Segment %	Participation Rate by Group	Index vs. Total Population
Total Basketball Participants (1+ times/year)				
New England	1307	5.0%	9.6%	104
Middle Atlantic	3271	12.4%	8.5%	92
East North Central	4669	17.8%	10.7%	115
West North Central	1454	5.5%	7.6%	83
South Atlantic	4870	18.5%	8.8%	95
East South Central	1695	6.4%	10.0%	107
West South Central	2860	10.9%	8.9%	96
Mountain	2126	8.1%	10.6%	114
Pacific	4052	15.4%	9.1%	98
Casual Basketball Participants (1-12 times/year)				
New England	385	4.5%	2.8%	93
Middle Atlantic	1328	15.4%	3.5%	114
East North Central	1507	17.5%	3.4%	113
West North Central	447	5.2%	2.4%	77
South Atlantic	1616	18.7%	2.9%	96
East South Central	572	6.6%	3.4%	110
West South Central	831	9.6%	2.6%	85
Mountain	605	7.0%	3.0%	99
Pacific	1338	15.5%	3.0%	99
Regular Basketball Participants (13-24 times/year)				
New England	208	5.2%	1.5%	108
Middle Atlantic	549	13.6%	1.4%	101
East North Central	773	19.2%	1.8%	125
West North Central	304	7.5%	1.6%	113
South Atlantic	590	14.6%	1.1%	75
East South Central	215	5.3%	1.3%	89
West South Central	416	10.3%	1.3%	91
Mountain	323	8.0%	1.6%	113
Pacific	653	16.2%	1.5%	103
Frequent Basketball Participants (25+ times/year)				
New England	714	5.2%	5.2%	109
Middle Atlantic	1394	10.2%	3.6%	76
East North Central	2389	17.5%	5.5%	114
West North Central	703	5.2%	3.7%	77
South Atlantic	2665	19.5%	4.8%	101
East South Central	908	6.7%	5.3%	111
West South Central	1613	11.8%	5.0%	105
Mountain	1199	8.8%	6.0%	124
Pacific	2062	15.1%	4.6%	96
* Participation figures in thousands (Source SGMA Research)				

Appendix B – Participation Trends by Gender as it Applies to Support Opportunities

Recreational trends from the last few years indicate that, on average, Americans participate in a sport or recreational activity of some kind at a relatively high rate (65%). Participation trends for both sports and recreation are evaluated because many sports parks are developed in parks and are not stand alone facilities. It is important to understand what the general public is interested in participating in as well because if amenities are added to a site where a sports complex is located it provides strong local support for the site.

Female participation rates, however, are slightly lower than their male counterparts – 61% of females participate at least once per year in a sport or recreational activity compared to a 69% participation rate of men. According to recreational trends research performed in the industry over the past twenty years, the top ten recreational activities for **adult females** are currently:

1. Walking
2. Aerobics
3. General exercising
4. Biking
5. Jogging
6. Basketball
7. Lifting weights
8. Golf
9. Swimming
10. Tennis

The top ten recreational activities for **adult males** are:

1. Golf
2. Basketball
3. Walking
4. Jogging
5. Biking
6. Lifting weights
7. Football
8. Hiking
9. Fishing
10. Hunting

While men and women share a desire for six of the top ten recreational activities listed above, men claim to participate in their favorite activities more often than women in any ninety-day span. With more women not only comprising a larger portion of the general populace during the mature stages of the lifecycle, but also participating in recreational activities further into adulthood, a relatively new market has appeared over the last two decades.

This mature female demographic is opting for less team oriented activities which dominate the female youth recreational environment, instead shifting more towards a diverse selection of individual participant activities, as evident in the top ten recreational activities mentioned above.

Appendix C – Fieldhouse Case Study Imagery Source List

Fieldhouse in Parker, Colorado (4 Images)

“Parker Field House.” Image. *www.heathsteel.com* 29 June 2012. 29 June 2012
<<http://www.heathsteel.com/8/Parker%20Field%20House/>>.

McDermont Fieldhouse, Lindsay CA (2 Images)

“Image of Lindsay, CA.” Image *www.tripadvisor.com* 29 June 2012. 29 June 2012
<http://www.tripadvisor.com/LocationPhotos-g32630-w2-Lindsay_California.html#40695315>.

“McDermont Fieldhouse Wrestling.” Image. *www.recordersports.com* 29 June 2012. 29 June 2012
<<http://www.recordersports.com/sections/article/gallery/?pic=1&id=871>>.

Virginia Beach, VA (3 Images)

“Aerial Photo of Building.” Image. *www.vbgov.com* 29 June 2012. 29 June 2012
<<http://www.vbgov.com/government/departments/parks-recreation/sports/pages/athletic-facilities.aspx>>.

“Virginia Beach Fieldhouse.” Image. *www.hamptonroadsports.com* 29 June 2012. 29 June 2012
<<http://hamptonroadssports.org/venues/index/view/id/33>>.

“The Virginia Beach Fieldhouse.” Image. *www.wackgc.com* 29 June 2012. 29 June 2012
<<http://wackgc.com/category/portfolio/pre-engineered-metal-building/>>.

Chelsea Piers, NY (3 Images)

“Chelsea Piers.” Image. *www.marnerarchitecture.com* 29 June 2012. 29 June 2012
<<http://www.marnerarchitecture.com/work/recreation/chelsea-piers>>.

“The Field House at Chelsea Piers.” Image. *www.chelseapiers.com* 29 June 2012. 29 June 2012
<<http://www.chelseapiers.com/onlocation/fieldhouse/soccer.htm>>.