



Needs Assessment and Feasibility Study for the Amateur Sports Market in Chico, California

October 10, 2018



October 10, 2018

Ms. Ann Willmann
General Manager
Chico Area Recreation & Park District
545 Vallombrosa Avenue
Chico, California 95926

Dear Ms. Willmann:

Conventions, Sports & Leisure International (CSL) has completed a two-phased needs assessment study for new sports and recreation facilities in Chico, California, including a detailed market demand and program analysis, followed by analyses of cost/benefit and funding issues.

The analysis presented in this report is based on estimates, assumptions and other information developed from industry research, data provided by study stakeholders, surveys of potential facility users, discussions with industry participants and analysis of competitive/comparable facilities and communities. The sources of information, the methods employed, and the basis of significant estimates and assumptions are stated in this report. Some assumptions inevitably will not materialize and unanticipated events and circumstances may occur. Therefore, actual results achieved will vary from those described and the variations may be material.

The findings presented herein are based on analyses of present and near-term conditions in the Chico area. As in all studies of this type, the recommendations and estimated results are based on competent and efficient management of the subject facility and assume that no significant changes in the event markets or assumed immediate and local area market conditions will occur beyond those set forth in this report. Furthermore, all information provided to us by others was not audited or verified and was assumed to be correct.

The report has been structured to provide study stakeholders with a foundation of research to provide decision makers with the information necessary to evaluate issues related to potential future decisions concerning the proposed development of new amateur sports facilities and should not be used for any other purpose. This report, its findings or references to CSL may not be included or reproduced in any public offering statement or other financing document.

We sincerely appreciate the assistance and cooperation we have been provided in the compilation of this report and would be pleased to be of further assistance in the interpretation and application of our findings.

Very truly yours,

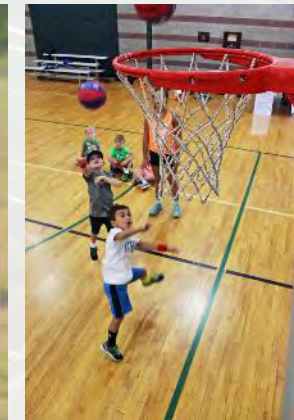
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1. INTRODUCTION



1. INTRODUCTION: Project Background

Conventions, Sports & Leisure International (CSL) was retained by the Chico Area Recreation & Park District (CARD) to conduct a needs assessment for new sports and recreation facilities in Chico, California. The goal of this effort is to measure the feasibility of creating new recreation facilities including, but not limited to, a new aquatics center, gymnasium, community center and multi-use fields, and prioritize planning and funding for supportable facilities. It is understood that three potential development scenarios are to be explored:

- Fulfilling the master planned development of community parkland space at DeGarmo Park, including through one or more potential public/private partnerships;
- Partnering with Everybody Healthy Body (EBHB) to develop a 264-acre property to offer a variety of recreational and sports tourism-related facilities; or,
- Developing a new community park within CARD-controlled land to be located at the as of yet undeveloped community at Valley's Edge.

The study process consisted of detailed research and analysis, including a comprehensive set of market-specific information derived from the following:

1. Experience garnered through more than 1,000 sports, recreation and event facility planning and benchmarking projects throughout the country.
2. Local market visits at the outset of the project, including community and facility tours, and discussions with study stakeholders.
3. In-person and telephone interviews, meetings and focus groups with approximately 50 local Chico area individuals including representatives of CARD and EBHB, the City of Chico, Chico State University, the Chico Unified School District, the Chico Chamber of Commerce, the Chico Downtown Business Association, Choose Chico, Butte College, various recreational and amateur sporting groups, local hoteliers and business leaders; and other visitor industry and community stakeholders.
4. Benchmarking research and analysis of facility data and interviews conducted with 32 competitive/regional and 34 comparable national sports, recreational and other event facilities.
5. Completed telephone interviews with 50 current and potential new users of recreational and amateur sports facilities in Chico.

DeGarmo Park



Proposed EBHB Development



1. INTRODUCTION: Scope of Work

The feasibility study conducted under this engagement consisted of a detailed set of research and analysis designed to aid in prioritizing planning, funding and development of new sports and recreation facilities in Chico, including an evaluation of public/private partnership opportunities with EBHB.

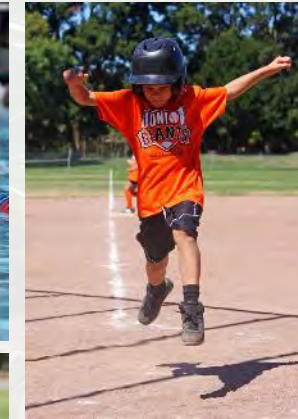
An outline of the scope of work is provided below.

PHASE 1: MARKET NEEDS ANALYSIS

1. Study kick-off and project planning
2. Existing Chico area conditions analysis
3. Industry characteristics and participation trends
4. Competitive facility analysis
5. Comparable facility and market analysis
6. Potential user telephone surveys
7. Indicated building program

PHASE 2: COST/BENEFIT ANALYSIS

1. Market supportable facility analysis
2. Event/use levels analysis
3. Financial operations analysis
4. Benefit estimates (economic, fiscal & other impacts)
5. Funding, ownership and management options analysis
6. Preparation of report



1. INTRODUCTION: Potential Site Overview

DEGARMO PARK



Owner: CARD
Operator: CARD

Facilities:

- 3 youth softball/baseball fields
- 2 full-size multisport rectangle fields
- 1 other field for practices
- Playground facilities

Development Opportunities:

- Master plan calls for 2 add'l multisport fields
- 3-4 court indoor complex and aquatic facility

(POTENTIAL) EVERYBODY HEALTHY BODY SITE



Owner: Private
Operator: TBD

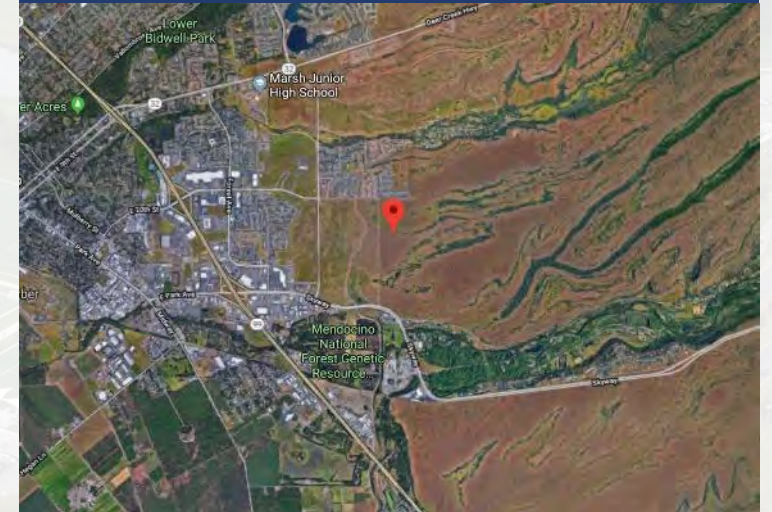
Proposed Facilities:

- 264-acre facility
- Recommended facility plan calls for:
 - 6 BB/SB fields; 4 multisport fields;
 - 6 indoor basketball courts; 50m x 25y outdoor pool; and, other competitive and recreational facilities

Development Issues:

- Projected \$49.9m cost to develop Phase I, \$37.1m for Phase II and \$46.2m for Phase III

(POTENTIAL) VALLEY'S EDGE SITE



Owner: Private
Operator: CARD

Proposed Facilities:

- 20-acre community park
- Would be developed in conjunction with as of yet undeveloped residential community
- Current plans call for 5 multisport fields and other recreational facilities

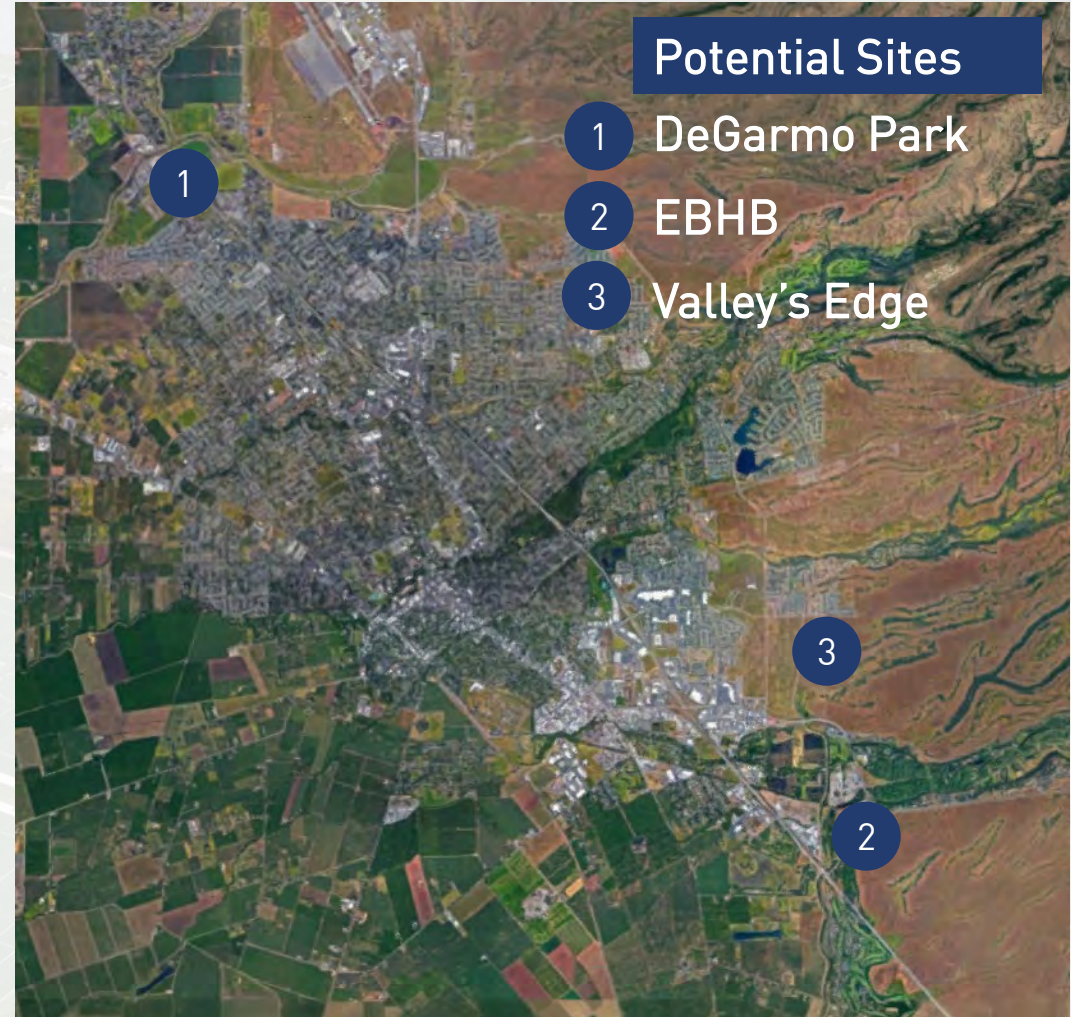
Development Issues:

- Facilities to be developed can be modified
- Development contingent on other factors

1. INTRODUCTION: Potential Site Overview

We begin with a demographic comparison of population within a 15-minute drive of each of the three potential sites. It is important to analyze whether there are any discernable differences among the immediate neighborhoods that would be directly served by enhancements to each of these potential sites. As shown, there is little difference in the demographic and socioeconomic characteristics of the areas immediately surrounding each potential site.

Demographic Variable	15-Minute Drive			
	DeGarmo Park	EBHB	Valleys Edge	United States
POPULATION:				
2000 Total Population	88,167	89,373	84,512	281,421,906
2010 Total Population	98,097	99,389	94,326	308,745,538
2018 Total Population	103,617	104,925	99,689	327,514,334
2023 Total Population	107,454	108,729	103,342	341,323,594
Historical Annual Growth Rate (2010 to 2018)	0.7%	0.7%	0.7%	0.8%
Projected Annual Growth Rate (2018 to 2023)	0.7%	0.7%	0.7%	0.8%
AGE:				
Median Age	31.5	31.6	30.9	38.2
Population Age 25 to 34	16.0%	15.9%	16.2%	15.20%
AGE DISTRIBUTION:				
Under 15	15.3%	15.2%	15.2%	19.20%
15 to 24	23.7%	23.8%	24.5%	13.70%
25 to 34	16.0%	15.9%	16.2%	15.20%
35 to 44	10.6%	10.5%	10.6%	12.90%
45 to 54	10.0%	9.9%	9.8%	13.40%
55 to 64	11.0%	10.9%	10.5%	13.30%
65 and over	15.5%	13.8%	13.3%	13.30%
INCOME DISTRIBUTION:				
Under \$24,999	28.7%	29.2%	29.6%	21.50%
\$25,000 to \$49,999	24.0%	24.4%	24.6%	22.70%
\$50,000 to \$74,999	16.4%	16.4%	16.2%	17.80%
\$75,000 to \$99,999	11.8%	11.5%	11.6%	12.40%
\$100,000 to \$149,000	10.9%	10.7%	10.5%	13.90%
\$150,000 or more	8.1%	7.8%	7.6%	11.70%



2. EXISTING MARKET CONDITIONS

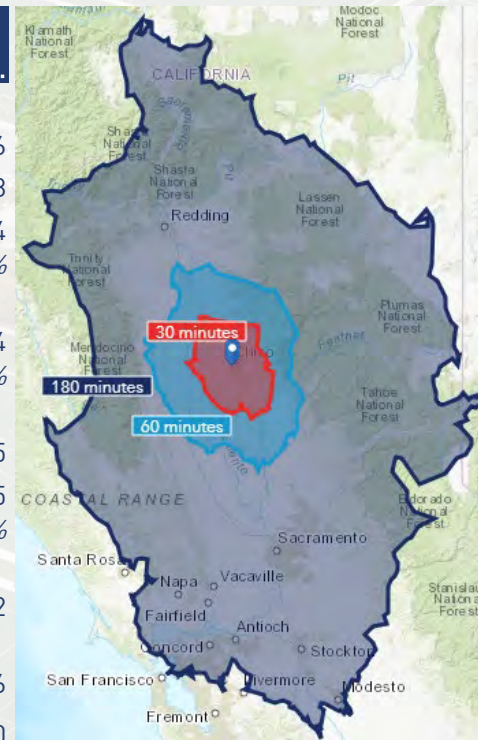


2. EXISTING MARKET: Key Market Demographics

The exhibit below illustrates the location of Chico its proximity to nearby markets and the markets/land area captured within 30-minute, 60-minute and 180-minute estimated driving distances from Chico. These distances will be utilized throughout the report for analyzing and comparing demographic and socioeconomic variables. While there are potential direct advantages presented for individuals living within 15-minutes of amateur sports facilities, it is reasonable to expect that most residents within 30-minutes would be willing to participate in league games, practices and other such activities on a regular basis. Those within 60-minutes could be expected to participate in somewhat regular games, and tournament activity, while those further away would be more likely to travel only for larger events.

Chico's population of nearly 180,000 within 30-minutes and over 410,000 within one-hour suggest a strong base of individuals that have a potential need for amateur sports facilities. The more than 6.7 million within three hours suggests a potential opportunity to host non-local tournament activity. The average household income in areas surrounding Chico is somewhat lower, while the ratio of businesses and employees per population (respectively) both exceed statewide and national averages.

Demographic Variable	City of					State of	
	Chico	15-minute	30-minute	60-minute	180-minute	California	U.S.
Population (2000)	76,732	88,786	157,093	361,693	5,567,432	33,871,648	281,421,906
Population (2010)	86,187	98,703	171,073	396,805	6,311,977	37,253,956	308,745,538
Population (2018 est.)	91,236	104,229	178,887	410,796	6,714,010	39,611,295	327,514,334
<i>% Change (2000-2018)</i>	<i>18.9%</i>	<i>5.6%</i>	<i>13.9%</i>	<i>13.6%</i>	<i>20.6%</i>	<i>16.9%</i>	<i>16.4%</i>
Population (2023 est.)	94,631	108,037	184,572	421,749	7,011,385	41,298,900	341,323,594
<i>% Change (2018-2023)</i>	<i>3.7%</i>	<i>3.7%</i>	<i>3.2%</i>	<i>2.7%</i>	<i>4.4%</i>	<i>4.3%</i>	<i>4.2%</i>
Avg. Household Inc. (2018 est.)	\$63,660	\$64,982	\$65,488	\$63,796	\$90,620	\$95,805	\$80,675
Avg. Household Inc. (2023 est.)	\$71,436	\$72,840	\$73,532	\$71,783	\$102,324	\$108,476	\$91,585
<i>% Change (2018-2023)</i>	<i>12.2%</i>	<i>12.1%</i>	<i>12.3%</i>	<i>12.5%</i>	<i>12.9%</i>	<i>13.2%</i>	<i>13.5%</i>
Median Age (2018, in years)	30.4	31.3	35.6	37.2	37.7	36.0	38.2
Businesses (2018 est.)	4,482	4,942	8,111	15,699	226,547	1,347,942	11,611,226
Employees (2018 est.)	47,084	49,916	78,363	156,041	2,636,384	16,037,430	152,829,200
Employee/Population Ratio	0.52:1	0.48:1	0.44:1	0.38:1	0.39:1	0.40:1	0.47:1

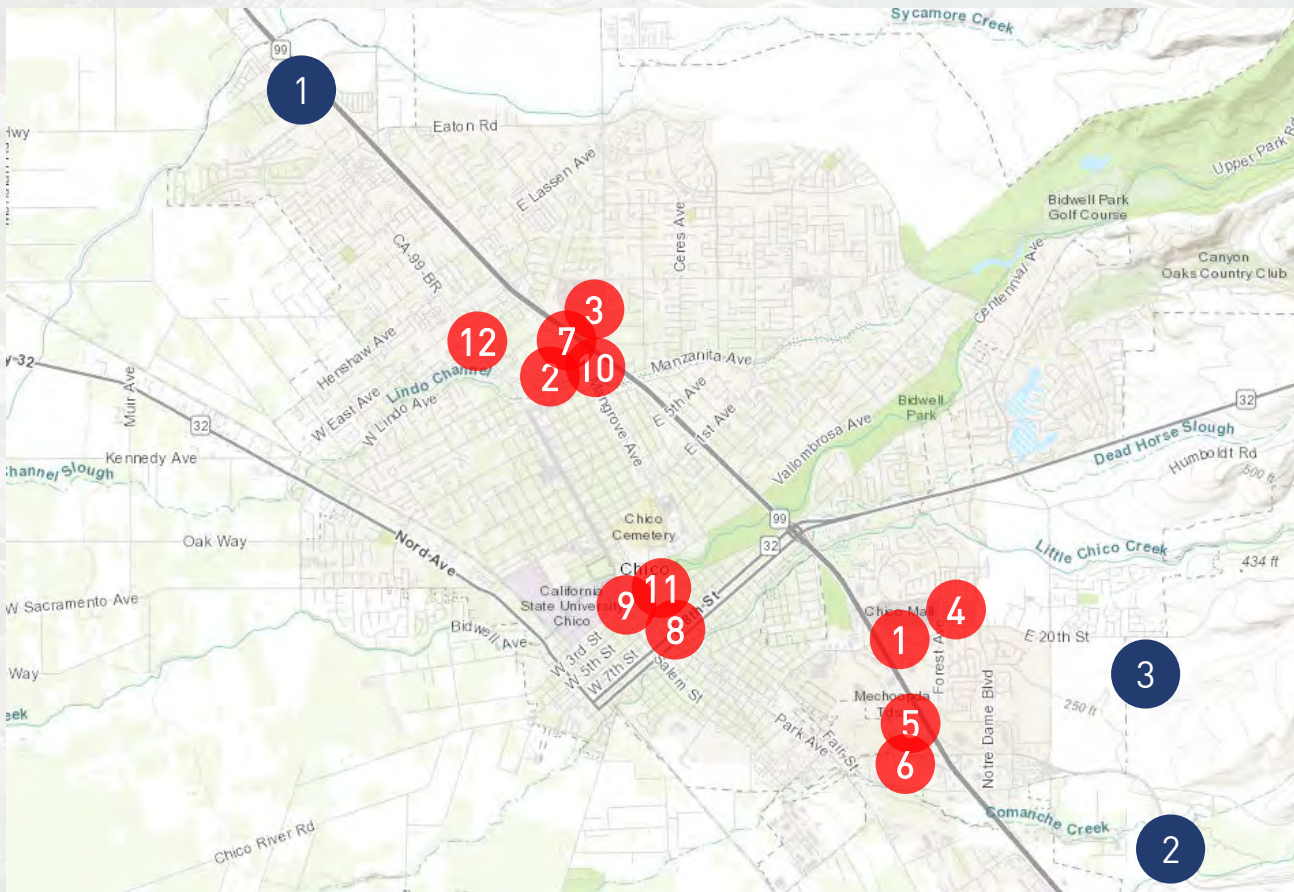


Market	Distance (miles)	Drive Time	Market Population
Yuba City, CA	45.9	0:57	66,800
Redding, CA	72.9	1:16	91,800
Sacramento, CA	89.7	1:36	495,200
Stockton, CA	138	2:33	307,100
Reno, NV	163	2:51	245,300
San Francisco, CA	164	2:48	864,800
San Jose, CA	196	3:30	1,023,000
Fresno, CA	261	4:10	522,000
Eugene, OR	386	6:24	166,600
Los Angeles, CA	473	7:20	3,976,000

Source: Google Maps, ESRI, 2018

2. EXISTING MARKET: Chico Hotel Inventory

To evaluate the viability of leveraging existing or potential new amateur sports facilities to drive visitation to Chico, it is important to evaluate the inventory of hotel rooms that are within a convenient driving distance of potential venues. There are 12 hotel properties throughout the city of Chico that offer at least 40 sleeping rooms. It is estimated that there are approximately 1,250 total sleeping rooms within the city of Chico. While most hotels are considered affordable, limited- or select-service hotel properties that would be best suited for accommodating participant and family members that may travel for tournaments at potential new amateur sports facilities, the total room count may prove to limit the overall size of tournaments that can be hosted in Chico without leaking economic impact to surrounding communities.



Map Key	Hotel	# of Rooms
1	Oxford Suites	184
2	Ramada Plaza	172
3	Best Western Heritage Inn	99
4	Holiday Inn Express	93
5	Courtyard by Marriott	90
6	Residence Inn by Marriott	78
7	Motel 6	78
8	Quality Inn - Downtown	63
9	Hotel Diamond - Downtown	58
10	Super 8 Motel	52
11	Safari Garden Motel	50
12	University Inn - Downtown	43

Estimated total hotel room inventory = 1,250 rooms

** Oxford Suites has been approved to add 112 rooms to their property, but has not submitted a building permit yet.
 ** A new Hampton Inn & Suites will be built with 148 rooms, but is currently resubmitting for an architectural review.

2. EXISTING MARKET: Chico Amateur Sports Facilities

An understanding of the inventory and quality of existing athletic indoor and outdoor facilities in the Chico area is critical in identifying areas of local and non-local need that may be met by new amateur sports facilities. These facilities maximize utilization and become a more valuable community asset if they provide programming and other opportunities in areas that may currently be lacking. The exhibits on the following pages summarize the existing inventory of sports and recreation facilities, and their relative location, in Chico. Subsequent pages present this information by type of sports and recreation facility (baseball/softball fields, multipurpose fields, indoor facilities and aquatic facilities). The first map represents the number of fields, courts and pools at each location by the size of placement markers. The subsequent maps present the location of fields, courts and pools, with a key indicating the quantity and type of facility available at each unique location.

The facilities included in the lists were identified by local leadership as being game ready and community accessible, and are able to be used for both adult and youth athletic practices and/or games. It should be noted that field inventories in the table include varying qualities of fields. For example, several of the soccer fields included in this inventory are smaller than regulation size and/or do not offer "tournament quality" playing surfaces, seating and/or amenities. They are only suitable for youth practices and are primarily located at facilities with limited accessibility. Further, many of the facilities are associated with schools that do not open their facilities to public use when school is in session. We have included the location of the three potential sites being considered for developing new/added amateur sports facilities in Chico.



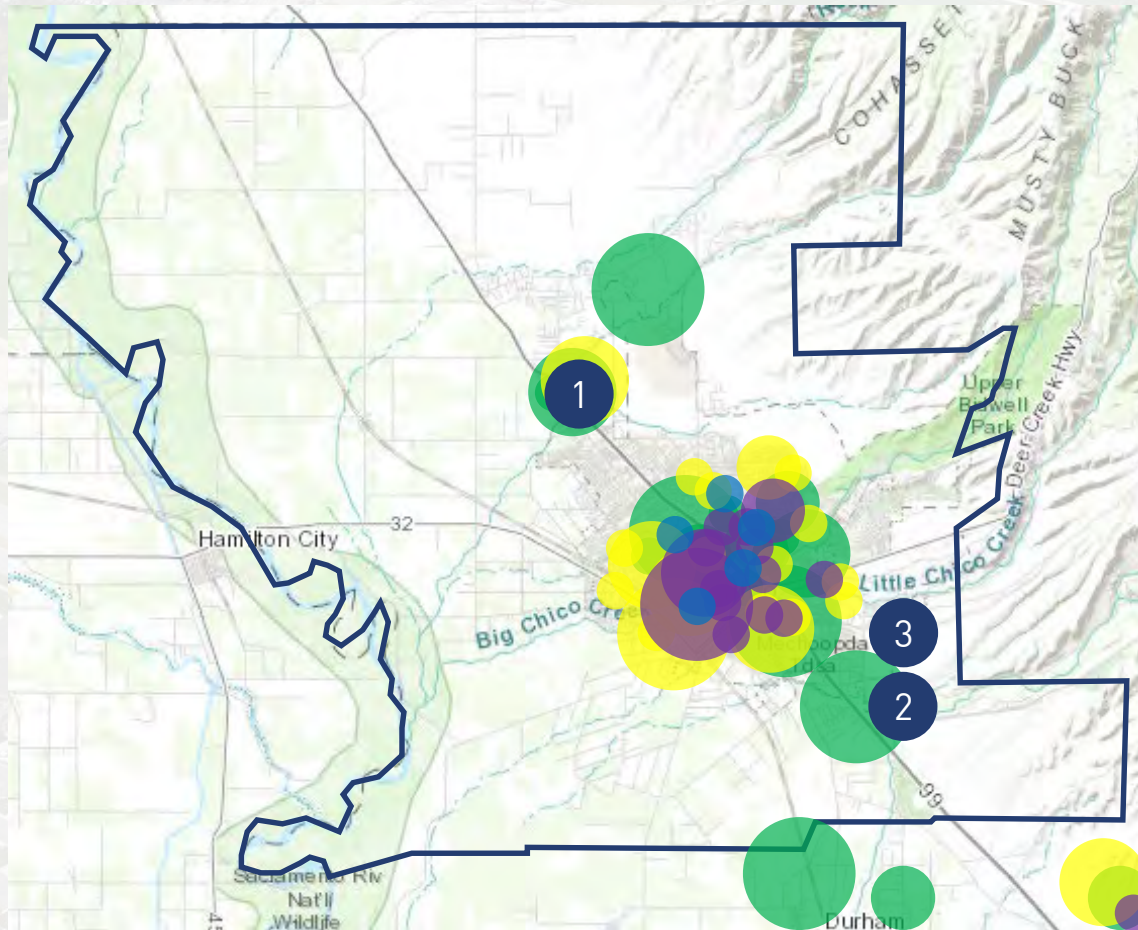
2. EXISTING MARKET: Chico Amateur Sports Facilities

Facility Name	Rectangle Fields				Total	Triangle Fields					Total	Other		Owner
	Adult	Youth	Other	Baseball		Youth	Softball		Other	Courts		Pool		
							Adult	Youth						
California State University - Chico	2	--	3	5	1	--	1	--	--	2	6	25Y	Independent	
Community Park	2	1	--	3	--	--	3	2	--	5	--	--	CARD	
Chico High School	2	--	1	3	2	--	2	--	--	4	3	--	CUSD	
DeGarmo Park	2	--	1	3	--	--	--	3	--	3	--	--	CARD	
John B. Cowan Sports Complex - Butte College	3	--	--	3	1	--	1	--	--	2	1	--	Independent	
Chico Jr. High	--	--	3	3	--	--	--	--	--	0	1	--	CUSD	
Pleasant Valley High	2	--	--	2	1	--	1	--	--	2	1.5	--	CUSD	
Rosedale Elementary	--	0	1	1	--	--	--	--	2	2	--	--	CUSD	
Wildwood Park	1	--	--	1	--	--	0	2	--	2	--	--	CARD	
Emma Wilson Elementary	--	--	1	1	--	--	--	--	1	1	--	--	CUSD	
Marigold Elementary	--	0	1	1	--	--	--	1	--	1	--	--	CUSD	
Bidwell Jr. High	--	--	1	1	--	--	--	--	--	0	1	--	CUSD	
Chapman Elementary	--	--	1	1	--	--	--	--	--	0	--	--	CUSD	
Citrus Elementary	--	--	1	1	--	--	--	--	--	0	--	--	CUSD	
Dorothy F. Johnson	--	--	1	1	--	--	--	--	--	0	1	--	CARD	
Hooker Oak Elementary	--	--	1	1	--	--	--	--	--	0	--	--	CUSD	
John McManus Elementary	--	--	1	1	--	--	--	--	--	0	--	--	CUSD	
Little Chico Creek Elementary	--	0	1	1	--	--	--	--	--	0	--	--	CUSD	
Marsh Jr. High	1	0	--	1	--	--	--	--	--	0	1	--	CUSD	
Parkview Elementary	--	0	1	1	--	--	--	--	--	0	--	--	CUSD	
Sierra View Elementary	--	--	1	1	--	--	--	--	--	0	--	--	CUSD	
Hooker Oak Park	--	--	--	0	1	--	2	--	--	3	--	--	CARD	
Neal Dow Elementary	--	--	--	0	--	--	--	0	1	1	--	--	CUSD	
One-Mile Park/Sycamore Field	--	--	--	0	--	--	1	--	--	1	--	--	City	
Shasta Elementary	--	--	--	0	--	--	--	--	1	1	--	--	CUSD	
Aaron Ray Clark Community Park Field House	--	--	--	0	--	--	--	--	--	0	1	--	CARD	
Boys and Girls Club of Chico	--	--	--	0	--	--	--	--	--	0	1	--	Independent	
Chico Country Day School	--	--	--	0	--	--	--	--	--	0	1	--	Charter School	
Chico Sports Club	--	--	--	0	--	--	--	--	--	0	1	25Y	Independent	
Evangelical Free Church	--	--	--	0	--	--	--	--	--	0	1	--	Church	
Grace Community Church	--	--	--	0	--	--	--	--	--	0	1	--	Church	
In Motion Fitness	--	--	--	0	--	--	--	--	--	0	1	25Y	Independent	
Pleasant Valley Pool & Rec Center	--	--	--	0	--	--	--	--	--	0	--	25Y	CARD	
Chico Westside Little League	--	--	--	0	1	3	1	--	--	5	--	--	Little League	
Chico Eastside Little League	--	--	--	0	1	3	1	--	--	5	--	--	Little League	
Chico Elks Lodge Little League Field	--	--	--	0	--	--	1	--	--	1	--	--	Independent	
Durham Community Park	--	--	--	0	--	--	1	--	--	2	--	--	Durham Rec	
Midway Park	3	--	--	3	2	--	1	--	--	5	--	--	Durham Rec	

Source: Chico Area Recreation Department, 2018

2. EXISTING MARKET: Chico Amateur Sports Facilities

An understanding of the inventory and quality of existing athletic facilities in Chico is critical in identifying potential areas of local and non-local need that may be met by a potential new amateur sports facility. New potential facilities can maximize utilization and become a more valued community asset if they can provide sports and recreation facilities and other programming in areas that may currently be lacking in the Chico area. The map below illustrates the location of various facilities within the city of Chico. The facilities included in the map were identified by local leadership as being game ready and community accessible, and are able to be used for both adult and youth athletic practices and/or games. Further, many of the facilities are associated with schools that have limited availability for public use. The number of fields or courts at each location has been accounted for by the size of placement markers.



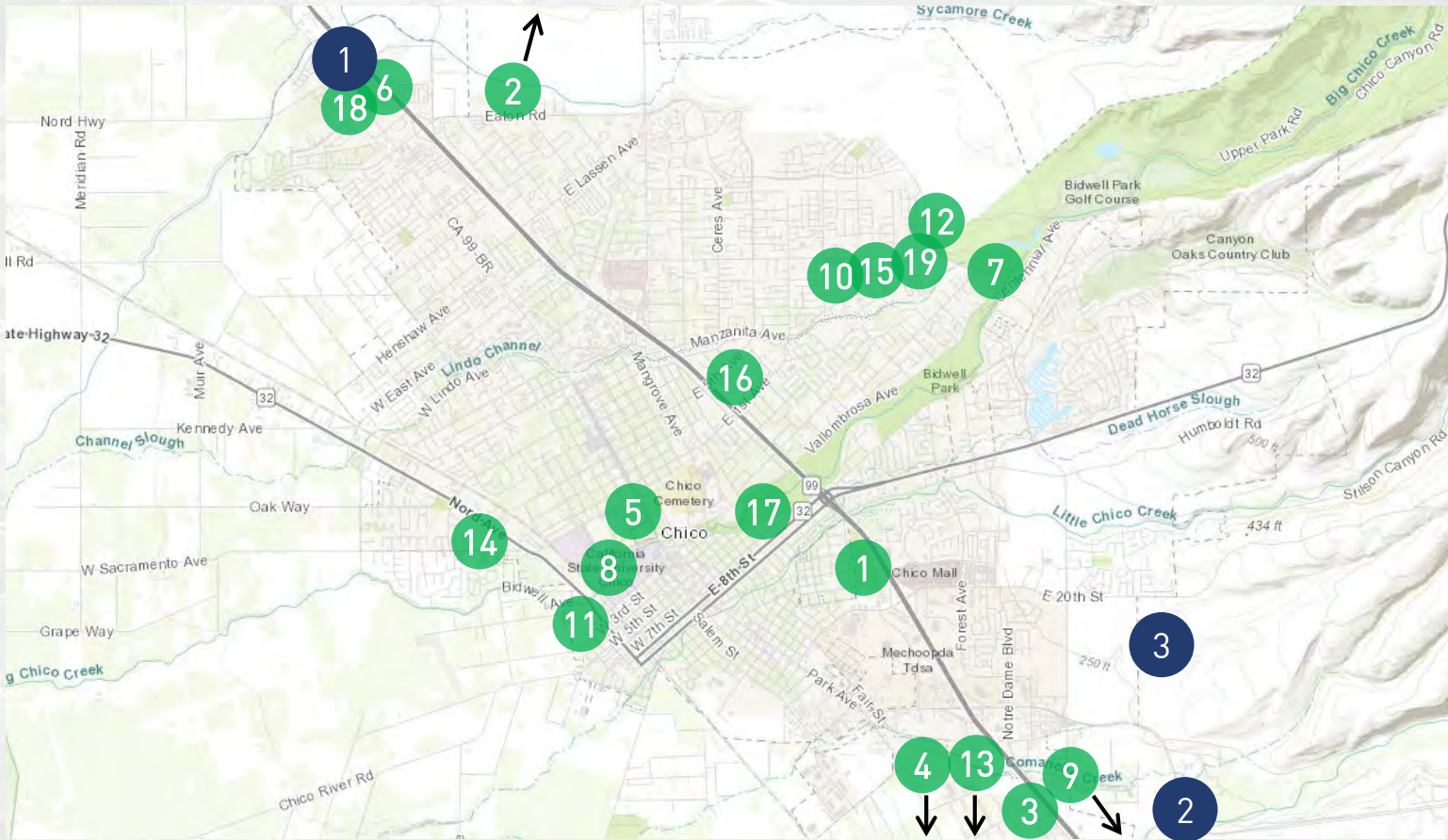
Key

- 1 field or court
 - 2 fields or courts
 - 3 fields or courts
 - 4+ fields or courts
 - Baseball/Softball
 - Multipurpose Fields
 - Basketball/Volleyball
 - Swimming
- 1 DeGarmo Park
 - 2 EBHB
 - 3 Valley's Edge

Source: Chico Area Recreation Department, 2018

2. EXISTING MARKET: Baseball/Softball Facility Inventory

Within the city of Chico, there are forty-eight baseball and softball fields spread out across nineteen different facilities that cater to both adult and youth league play and practices. However, the majority of these facilities are high school and elementary school fields, and therefore public use can be limited depending on school functions. On average, there are only two to three fields per location, making it difficult for Chico to host any large-scale baseball or softball tournaments without the use of multiple locations.

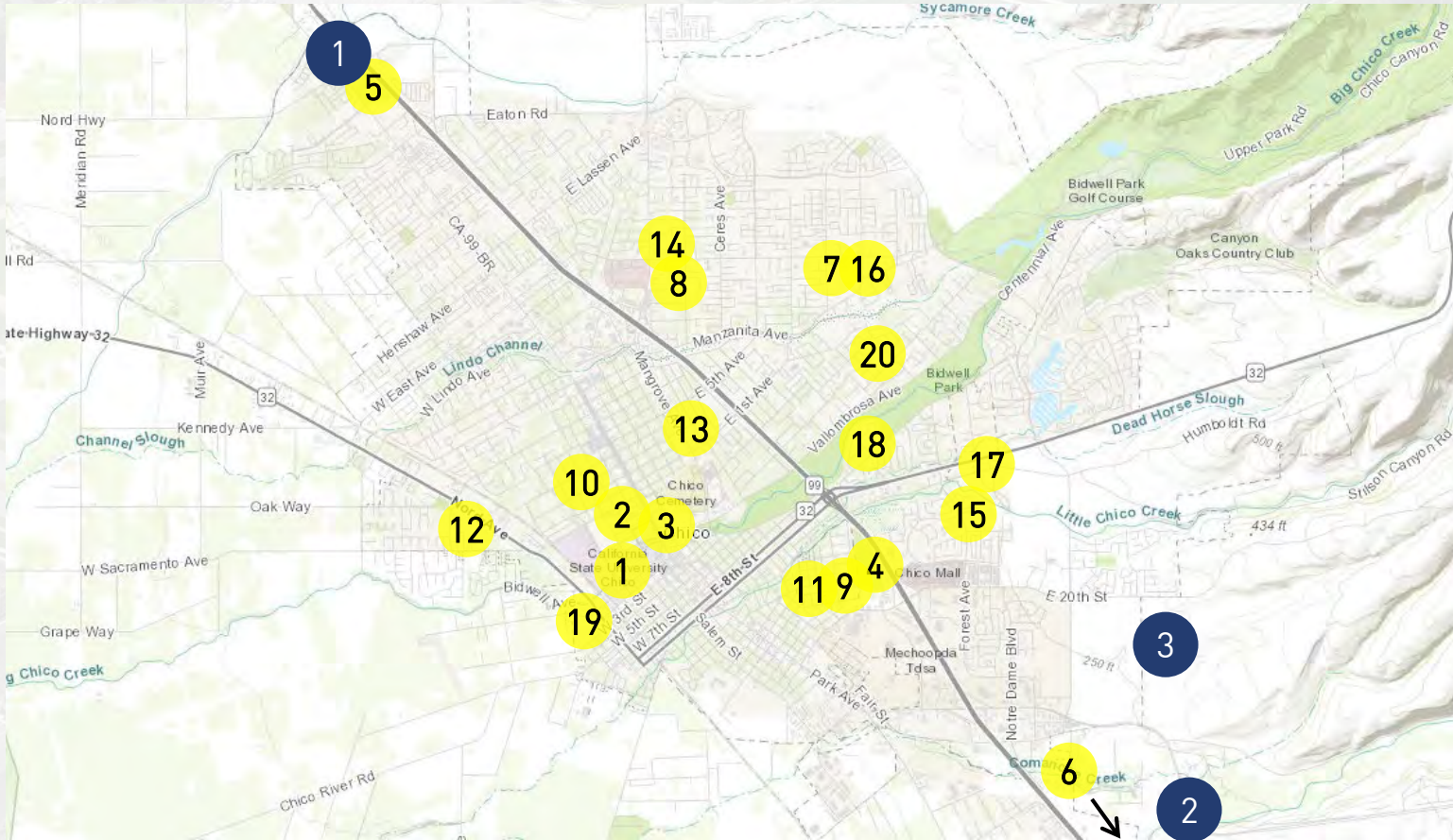


Key	Facility Name	Baseball		Softball		Other	Total
		Adult	Youth	Adult	Youth		
1	Community Park	--	--	3	2	--	5
2	Chico Westside Little League	1	--	4	--	--	5
3	Chico Eastside Little League	1	--	4	--	--	5
4	Midway Park	2	--	3	--	--	5
5	Chico High School	2	--	2	--	--	4
6	DeGarmo Park	--	--	--	3	--	3
7	Hooker Oak Park	1	--	2	--	--	3
8	California State University	1	--	1	--	--	2
9	Butte College	1	--	1	--	--	2
10	Pleasant Valley High	1	--	1	--	--	2
11	Rosedale Elementary	--	--	--	--	2	2
12	Wildwood Park	--	--	0	2	--	2
13	Durham Community Park	--	--	2	--	--	2
14	Emma Wilson Elementary	--	--	--	--	1	1
15	Marigold Elementary	--	--	--	1	--	1
16	Neal Dow Elementary	--	--	--	0	1	1
17	Sycamore Field	--	--	1	--	--	1
18	Shasta Elementary	--	--	--	--	1	1
19	Chico Elks Lodge Field	--	--	1	--	--	1

Source: Chico Area Recreation Department, 2018

2. EXISTING MARKET: Multipurpose Field Facility Inventory

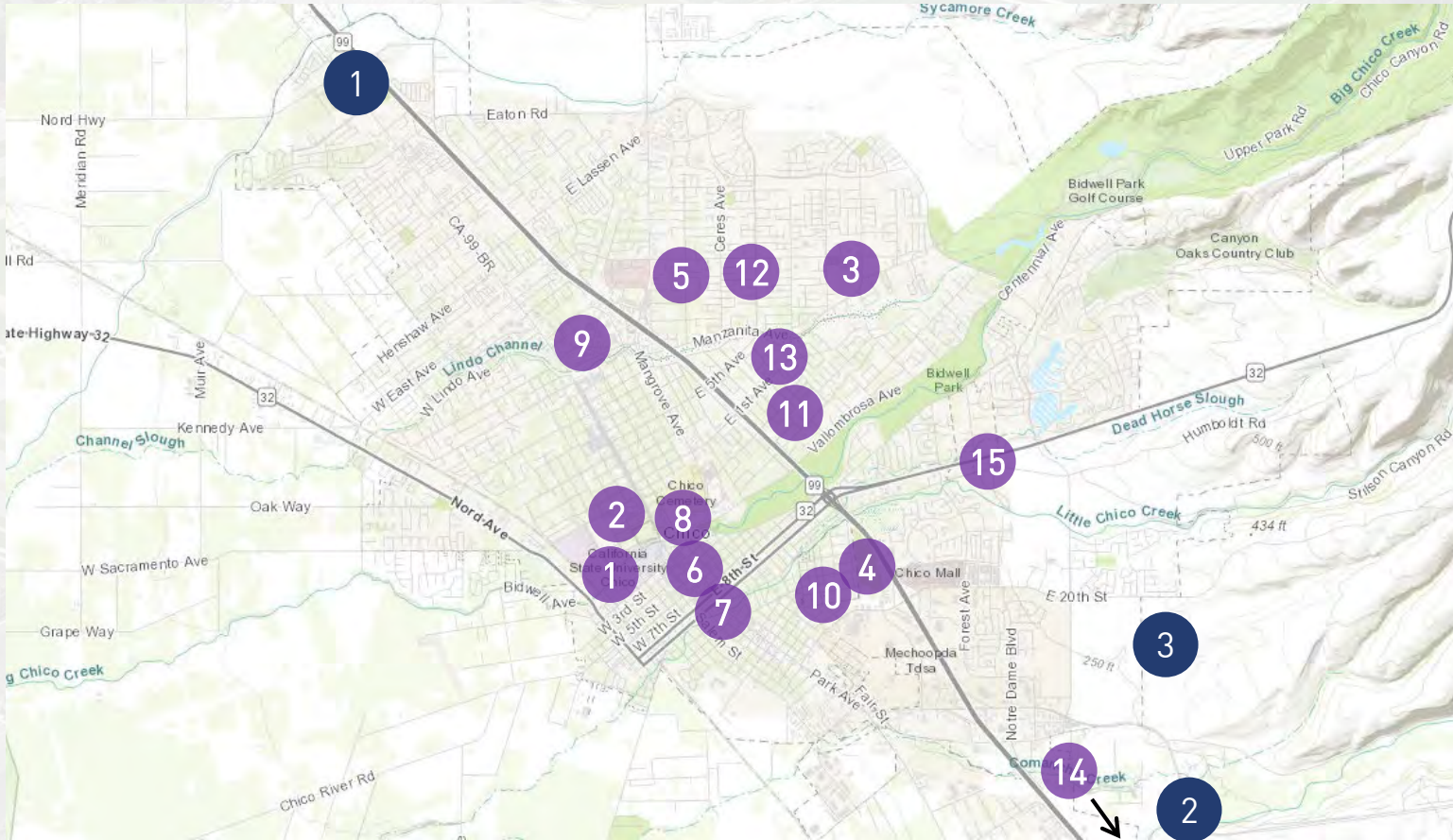
There are twenty facilities in Chico that offer multipurpose rectangle fields for soccer, lacrosse, and flag football leagues and competitions, though most are only suitable for youth practices and are not tournament quality. Further, while fields located at CSU-Chico and Butte College are included in this inventory, they are not typically available for public use. Additionally, all but two (Chico High School) of these fields are natural grass, which require rest and limit opportunities to attract tournaments for lack of guaranteed games.



Key	Facility Name	Rectangle Fields			
		Adult	Youth	Other	Total
1	California State University – Chico	2	--	3	5
2	Chico High School	2	--	1	3
3	Chico Jr. High	--	--	3	3
4	Community Park	2	1	--	3
5	DeGarmo Park	2	--	1	3
6	Butte College	3	--	--	3
7	Pleasant Valley High	2	--	--	2
8	Bidwell Jr. High	--	--	1	1
9	Chapman Elementary	--	--	1	1
10	Citrus Elementary	--	--	1	1
11	Dorothy F. Johnson Park	--	--	1	1
12	Emma Wilson Elementary	--	--	1	1
13	Hooker Oak Elementary	--	--	1	1
14	John McManus Elementary	--	--	1	1
15	Little Chico Creek Elementary	--	0	1	1
16	Marigold Elementary	--	0	1	1
17	Marsh Jr. High	1	0	--	1
18	Parkview Elementary	--	0	1	1
19	Rosedale Elementary	--	0	1	1
20	Sierra View Elementary	--	--	1	1

2. EXISTING MARKET: Indoor Court Facility Inventory

While Chico has fifteen facilities that offer indoor courts, the courts at CSU-Chico, Evangelical Free Church, Grace Community Church and Butte College are not typically available for public use. The only complex available to the general public that offers multiple courts is Chico High School; however, scheduling priority goes to CUSD activities, limiting both local usage and opportunities to host tournaments capable of attracting non-local teams and participants.



Key	Facility Name	Courts
1	California State University – Chico	6
2	Chico High School	3
3	Pleasant Valley High	1.5
4	Aaron Ray Clark Community Park Field House	1
5	Bidwell Jr. High	1
6	Boys and Girls Club of Chico	1
7	Chico Country Day School	1
8	Chico Jr. High	1
9	Chico Sports Club	1
10	Dorothy F. Johnson Center	1
11	Evangelical Free Church	1
12	Grace Community Church	1
13	In Motion Fitness	1
14	Butte College	1
15	Marsh Jr. High	1

2. EXISTING MARKET: Aquatic Facility Inventory

As shown below, aquatic facilities are fairly well distributed throughout Chico. Chico does not offer any 50-meter facilities for the summer long-course season or the highest levels of competition. Further, the only community pool available is Pleasant Valley at Bidwell Junior High School. The pool at the Wildcat Recreation Center on CSU-Chico's campus is not available for use by groups or individuals outside of the University.



Key	Facility Name	Pool
1	Pleasant Valley Pool (Bidwell Jr. High)	25Y
2	In Motion Fitness	25Y
3	Chico Sports Club	25Y
4	CSU - Wildcat Recreation Center	25Y
5	Sycamore Pool	N/A

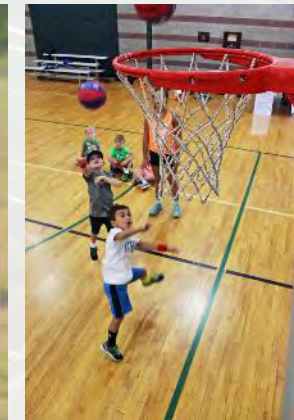
Source: Chico Area Recreation Department, 2018

2. EXISTING MARKET: Conclusions

The strength of a market in terms of its ability to support and utilize sports and recreation facilities is measured, in part, by the size of the local and regional market area population and its age, income and other characteristics. Other local market characteristics have relevance when considering the attractiveness of a particular community as a host for major amateur sports facilities, including transportation accessibility, climate, existing local inventory of athletic facilities, and visitor amenities (such as hotels, attractions and other such items). The Chico area is an independent economy and unique destination situated in northern California. Important aspects of the community and destination as they relate to the potential opportunity for developing new sports and recreation facilities include:

- The City of Chico is located approximately halfway between Sacramento and Redding, along US Route 99, with drivable access to more than 6.7 million residents and an independent economy with major employers including Enloe Medical Center, Build.com, Chico State University and Sierra Nevada Brewing Co. It also serves as a regional destination for shopping with Chico Mall and its unique downtown, and recreation with the 3,670-acre Bidwell Park.
- There are approximately 1,250 sleeping rooms within the city of Chico, with pockets of sleeping rooms near the southern and northern borders of Chico with direct access/visibility to Route 99, and downtown Chico near Chico State. All of the hotel facilities are within a 15 minute drive of DeGarmo Park, the EBHB site or the Valley's Edge site. While most hotels are considered affordable, limited- or select-service hotel properties that would be best suited for accommodating participant and family members that may travel for tournaments at potential new amateur sports facilities, the total room count may prove to limit the overall size of tournaments that can be hosted in Chico without leaking economic impact to surrounding communities.
- While a number of sports and recreation facilities, pools and fields exist throughout Chico, the area is lacking a significant concentration of such facilities in a single location. Many communities have seen that developing concentrated sports and recreation facilities benefits the local sports market by consolidating activities and operations at one single site, and such developments have assisted in recreational activity participation growth.
- Community Park and DeGarmo Park represent the largest concentration of outdoor sports and recreation fields/facilities in Chico, with the exception of Chico State University facilities, which are traditionally reserved for CSU-related activities.
- Indoor court space is limited to Chico Unified School District facilities. CUSD retains primary booking priority for these facilities and offers increasingly limited booking opportunities to CARD and/or other outside groups.
- Both competitive and recreational pool facilities are fairly limited in Chico, with both Chico and Pleasant Valley High School swim programs sharing the 25-yard, 6-lane Pleasant Valley Pool, CARD using the adjacent ½ pool for learn-to-swim and recreational programming and the local swim club (Aquajets) use the 25-yard pool at In Motion Fitness (private club requiring membership dues). The pool at CSU is exclusively for student and faculty use, while Sycamore Pool is carved out of Big Chico Creek and only suitable for recreational use.

3. PARTICIPATION AND INDUSTRY TRENDS



3. INDUSTRY TRENDS: Overview

The purpose of this section is to provide an overview of sports participation trends in the United States and the west coast region. An understanding of these trends at a national, regional and local level provides a framework from which to assess potential demand for new amateur sports facilities in Chico.

The statistical data presented in this section was derived from the National Sporting Goods Association's Sports Participation study, which was most recently conducted in 2018. The study measures the annual number of participants in a variety of sports and recreational activities, and the frequency of participation during the previous calendar year. Research is derived from a study based on approximately 40,000 interviews encompassing youth and adult sports participation.

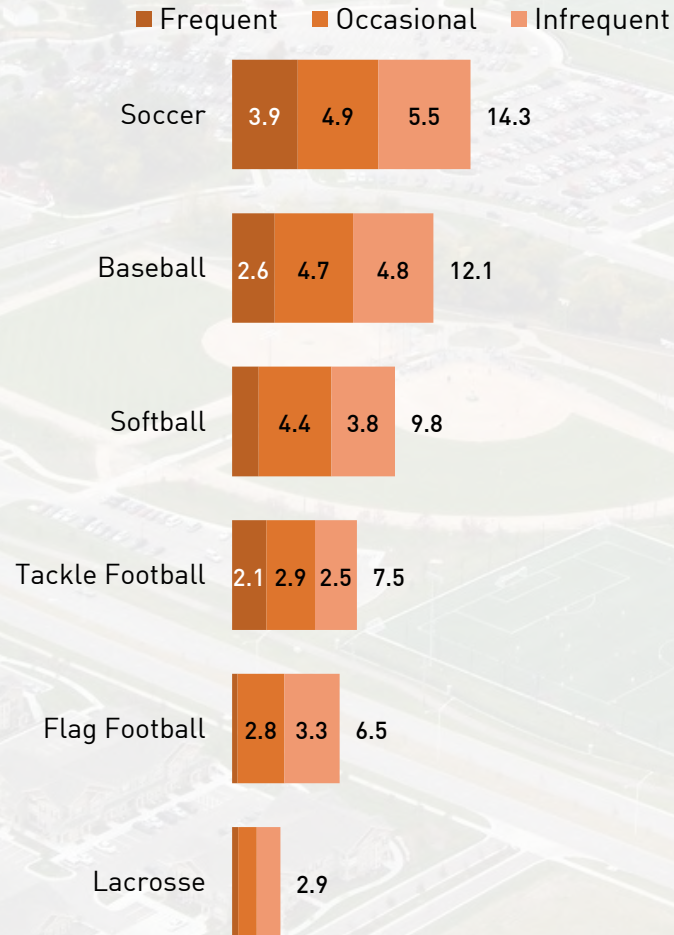
Additionally, we have analyzed data from the National Recreation and Park Association 2018 Agency Performance Review, which presents data and insights from over 1,000 park and recreation agencies, including metrics on facilities per resident, budgets, staffing and more.

This section presents relevant information on sports participation and facility offering trends for activities that potential new amateur sports facilities in Chico could potentially host.

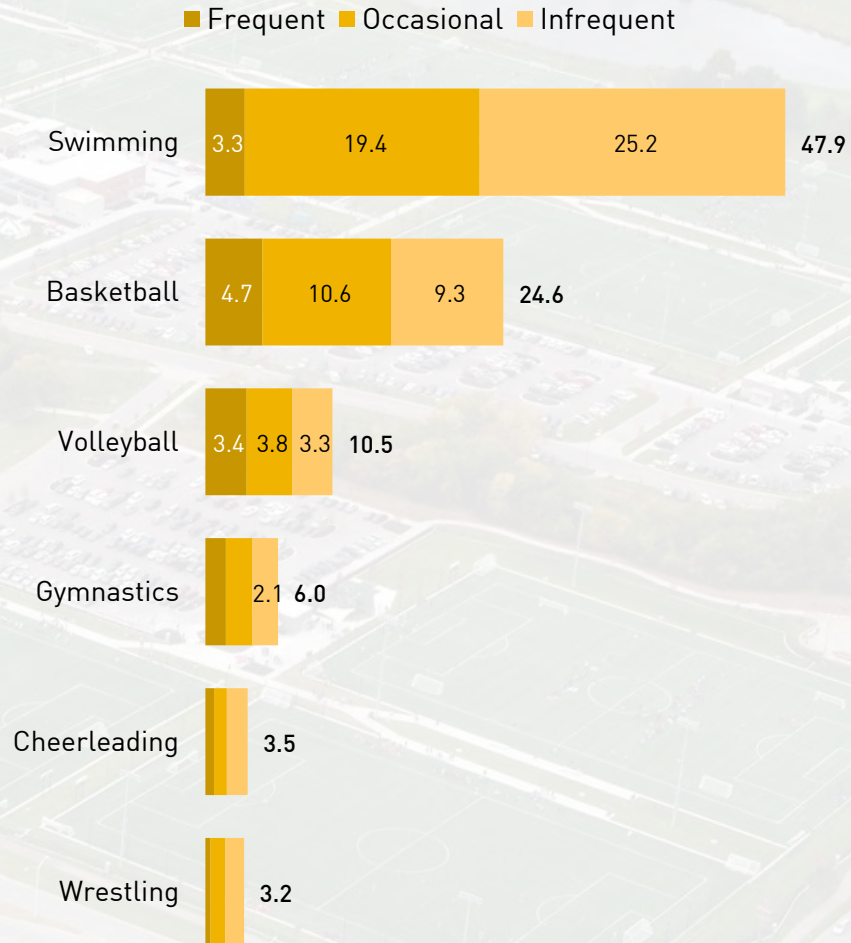


3. INDUSTRY TRENDS: National Participation Levels (in millions)

Outdoor Sports (in millions)



Indoor Sports (in millions)



Although it is anticipated that the vast majority of programming at an amateur sports facility in Chico would be dedicated to local sports participants, it is important to understand the overall rates on a national level. National participation levels can provide insights into the overall popularity of a sport, as well as the size of the base from which to attract new frequent participants. The exhibits to the left present a summary of the national participation rates of both outdoor and indoor sports, broken out by participation level (i.e. frequent, infrequent and occasional).

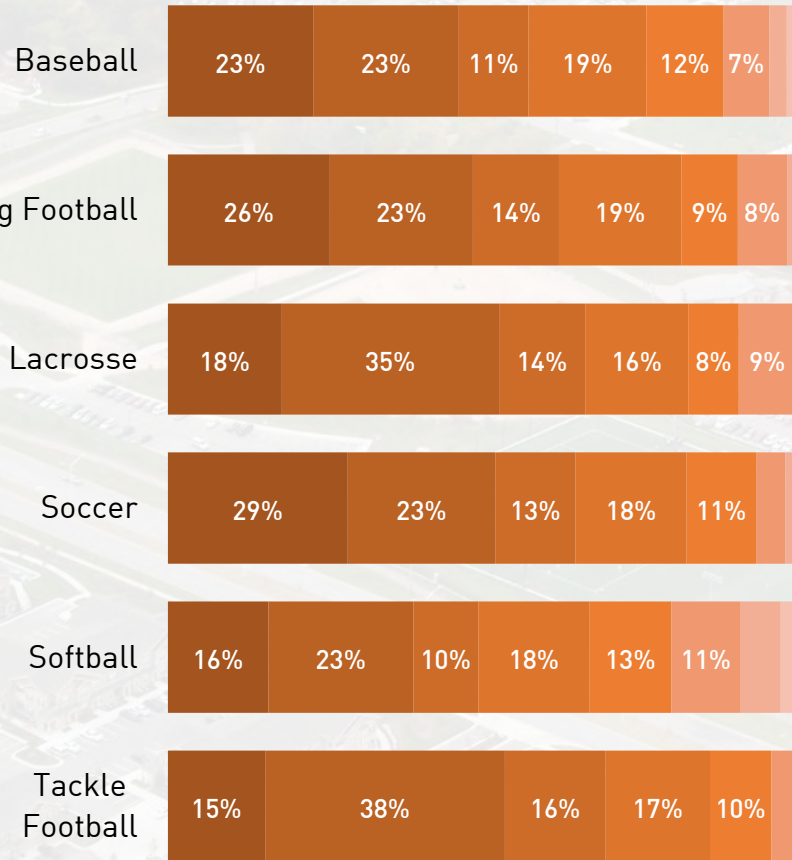
Soccer and baseball have the highest participation levels for outdoor sports with a balanced range of frequent to infrequent players. This suggests that multipurpose soccer fields and baseball diamonds are used frequently for a multitude of reasons throughout the year. Investing in more of these fields benefits many communities across the nation. For indoor sports, swimming and basketball have the highest participation levels. Although swimming far exceeds basketball in total participation, basketball exceeds swimming's frequent user base, suggesting that basketball is a year-round sport with many opportunities for facilities to host tournaments and other team events.

Source: NSGA, 2018.

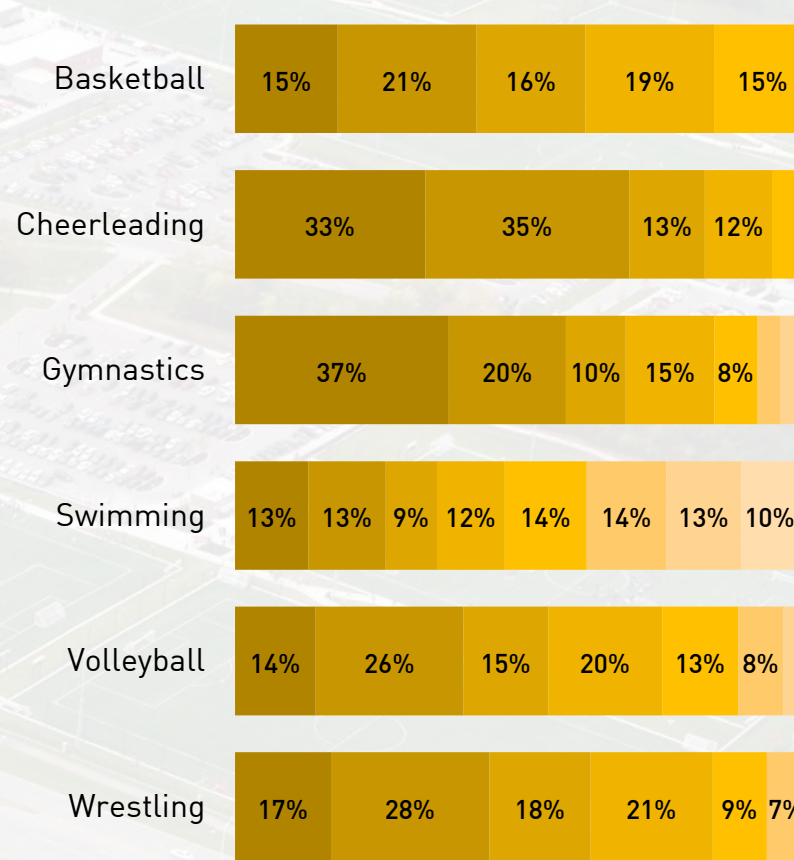
3. INDUSTRY TRENDS: National Participation Levels by Age

Outdoor Sports

Outdoor Sports ■ 7-11 ■ 12-17 ■ 18-24 ■ 25-34 ■ 35-44 ■ 45-54 ■ 55-64 ■ 65-74 ■ 75+
Indoor Sports ■ 7-11 ■ 12-17 ■ 18-24 ■ 25-34 ■ 35-44 ■ 45-54 ■ 55-64 ■ 65-74 ■ 75+



Indoor Sports



These exhibits summarize sports participation levels by age group for outdoor and indoor sports. An amateur sports facility in Chico would be anticipated to be utilized by a variety of age groups, and it is important to understand which sports appeal to each age group in order to consider appropriate programming.

The largest user groups in almost every sport are ages 7-11 and ages 12-17. Youth sports dominate the national participation levels, and therefore, facility management can plan on having most of its programming for youth sports

The outdoor sports trends show the need for various sizes of multipurpose fields to provide league play and practice space for soccer, flag football, and lacrosse. As the participants' ages change, Chico will need to offer different size multipurpose fields, whether this be through multiple fields or from clearly outlining the fields based on the sport.

Swimming has the largest variety of age groups participating, therefore a natatorium facility would need to consider scheduling times for open swims and lessons carefully.

Source: NSGA, 2018.

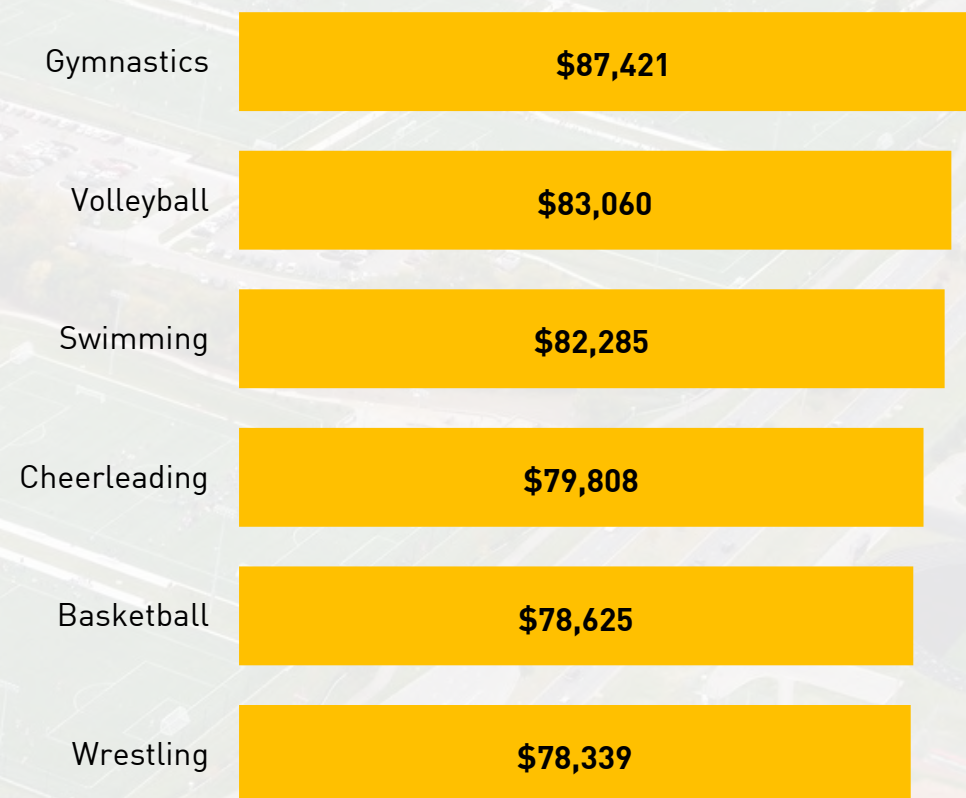
3. INDUSTRY TRENDS: Average Household Income by Sport

Although it is important to understand overall sports participation rates, there are other factors that contribute to the willingness and ability of an individual or a family to participate in a given sport or activity. Household income has a direct influence on sports participation due to the fact that sports require different levels of annual investment, some of which may not be feasible for all people. The charts below present a summary of the average household income of the outdoor and indoor sports reviewed. Lacrosse and gymnastics have the highest average household incomes associated with them, with more than \$98,399 and \$87,400, respectively. Facility management can utilize this information to better understand the overall sports participation based on the average income of the Chico area, and it can help them decide which sports and tournaments they want to pursue.

Outdoor Sports



Indoor Sports



Source: NSGA, 2018.

3. INDUSTRY TRENDS: Frequent Participation Rates

This exhibit summarizes the frequent participation rates nationally and regionally for each sport indicated. The rate of participation includes only frequent users and does not account for occasional and infrequent users. Gymnastics, wrestling, volleyball and basketball all have higher participation rates regionally than nationally among indoor sports participants, while outdoor sports such as baseball, lacrosse, soccer and flag football have higher participation rates regionally than nationally. An opportunity exists to balance facility/ complex programming across a variety of sports to ensure consistent usage throughout the year.

	Frequent Participation (times annually)	National Frequent Participation Rate	Pacific Index	Adjusted Pacific Participation Rate
Indoor Sports:				
Swimming	110+	1.10%	94	1.04%
Basketball	50+	1.60%	105	1.68%
Volleyball	20+	1.16%	111	1.29%
Gymnastics	40+	0.58%	124	0.71%
Cheerleading	70+	0.25%	66	0.16%
Wrestling	50+	0.15%	122	0.18%
Outdoor Sports:				
Soccer	40+	1.33%	125	1.67%
Baseball	50+	0.87%	145	1.25%
Softball	40+	0.54%	98	0.53%
Tackle Football	50+	0.70%	74	0.52%
Flag Football	50+	0.11%	113	0.13%
Lacrosse	60+	0.13%	139	0.17%

Source: NSGA, 2018.

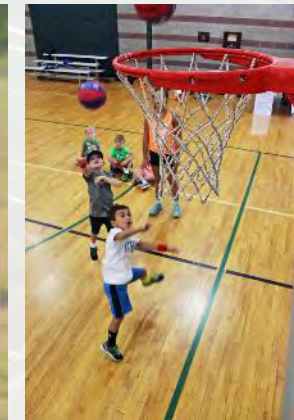
3. INDUSTRY TRENDS: Estimated Local Participation

The following exhibit summarizes the estimated population base participating in each identified sport based on participation rates applied to the overall market population. Again, the rate of participation includes only frequent users and does not account for occasional and infrequent users. The city of Chico would have between approximately 650 and 710 frequent participants across all sports based on national and regional participation rates, respectively. Frequent participants within a 30-minute drive would average between an estimated 1,270 and 1,390 participants per sport, while a 180-minute drive radius would yield between an estimated 47,600 and 52,200 frequent participants per sport, based on national and regional rates, respectively. This base of frequent participants presents a significant opportunity to host non-local tournament, meet and other activity in Chico.

Estimated Frequent Participants												
Market Population:	City of Chico		15-minute Drive Time		30-minute Drive Time		60-minute Drive Time		180-minute Drive Time		State of California	
	National Rate	Regional Rate	National Rate	Regional Rate	National Rate	Regional Rate	National Rate	Regional Rate	National Rate	Regional Rate	National Rate	Regional Rate
	91,236		104,096		178,887		410,796		6,714,010		39,611,295	
Swimming	1,007	946	1,149	1,080	1,974	1,856	4,534	4,262	74,097	69,651	437,158	410,928
Basketball	1,460	1,533	1,666	1,749	2,863	3,006	6,574	6,903	107,447	112,819	633,914	665,610
Volleyball	1,058	1,175	1,207	1,340	2,075	2,303	4,764	5,288	77,869	86,434	459,410	509,946
Gymnastics	525	651	599	742	1,029	1,276	2,363	2,930	38,619	47,888	227,845	282,528
Cheerleading	224	148	256	169	439	290	1,008	666	16,481	10,878	97,237	64,177
Wrestling	138	168	157	191	270	329	619	755	10,119	12,345	59,698	72,831
Soccer	1,217	1,522	1,389	1,736	2,387	2,984	5,481	6,852	89,584	111,981	528,530	660,662
Baseball	789	1,144	900	1,306	1,547	2,244	3,554	5,153	58,080	84,216	342,659	496,855
Softball	490	480	559	548	961	941	2,206	2,162	36,053	35,332	212,707	208,452
Tackle Football	638	472	727	538	1,250	925	2,871	2,124	46,919	34,720	276,814	204,842
Flag Football	102	115	116	131	200	226	459	519	7,499	8,474	44,245	49,997
Lacrosse	115	160	131	182	225	313	517	718	8,444	11,738	49,820	69,250
AVERAGE	647	709	738	809	1,268	1,391	2,912	3,194	47,601	52,206	280,836	308,007

Source: NSGA, ESRI, 2018.

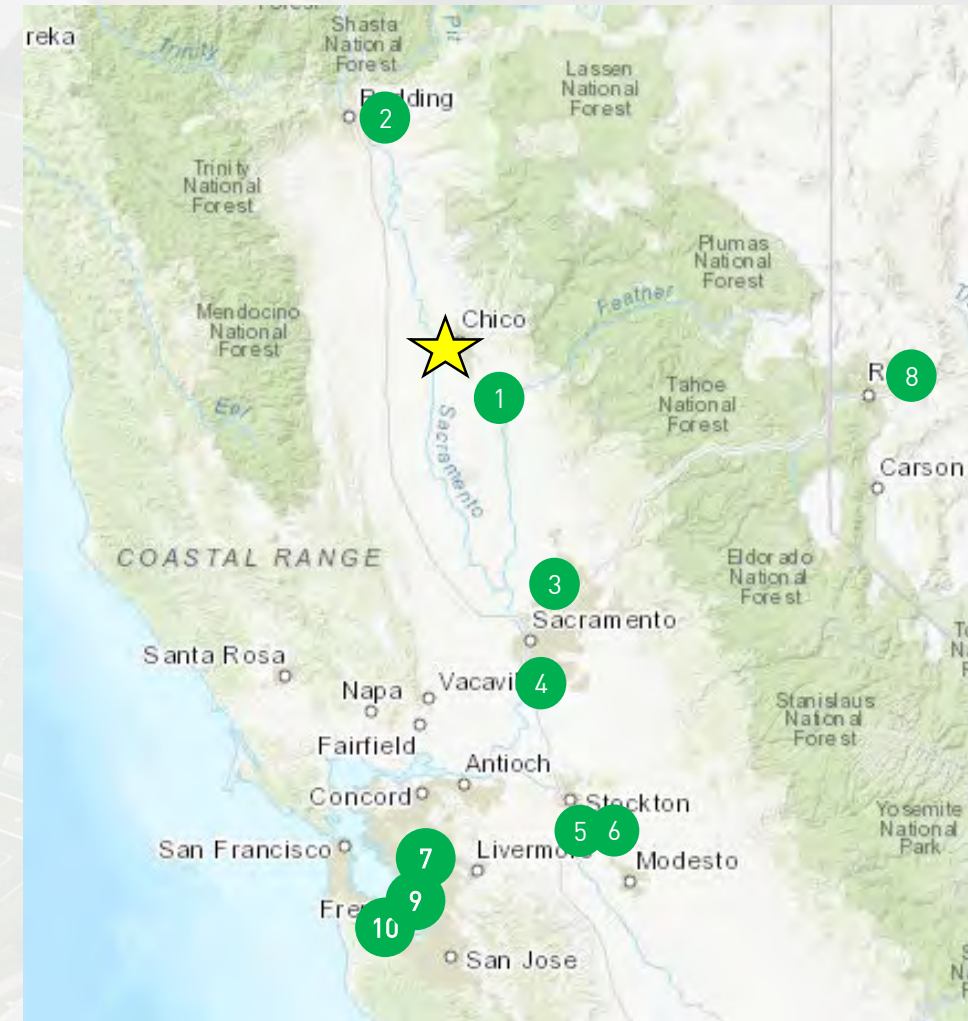
4. COMPETITIVE FACILITIES



4. COMPETITIVE FACILITIES: Baseball/Softball Facilities

CSL identified 10 baseball and softball facilities throughout the region that would compete for similar event activity if new sports and recreational facilities were to be built. Big League Dreams Ballpark in Redding offers the most competitive state-of-the-industry sports and recreation facility north of Sacramento; however, competition from the greater Bay Area is more prevalent.

Facility	City, State	Baseball		Softball		Total # of Fields	Distance to Chico (miles)
		Adult	Youth	Adult	Youth		
1 Nelson Park	Oroville, CA	--	--	1	5	6	22
2 Big League Dreams Ballpark	Redding, CA	5	--	--	--	5	73
3 Mahany Park	Roseville, CA	1	3	2	--	6	83
4 Elk Grove Regional Park	Elk Grove, CA	1	--	4	7	12	106
5 Manteca Big League Dreams	Manteca, CA	--	6	--	--	6	152
6 Mistlin Sports Park	Ripon, CA	2	--	4	--	6	157
7 Ken Mercer Sports Park	Pleasanton, CA	1	2	7	15	25	176
8 Golden Eagle Regional Park	Sparks, NV	2	4	6	--	12	176
9 Central Park Sports Complex	Fremont, CA	--	--	6	--	6	180
10 Twin Creeks Sports Complex	Sunnyvale, CA	10	--	--	--	10	192
AVERAGE		2	2	3	3	9	132



4. COMPETITIVE FACILITIES: Baseball/Softball Facilities

Nelson Park (Oroville, CA)

Nelson Park is a multi-field complex that includes one adult and five youth softball fields. The park also contains a nearby snack bar, restrooms, and playground.

Big League Dreams Ballpark (Redding, CA)

Big League Dreams is a privately operated youth baseball facility located 70 miles north of Chico. The complex features 5 youth baseball fields, each designed as a scaled-down replica of famous ballparks such as Fenway Park and Wrigley Field. The complex also offers a 20,000 sq. ft. indoor pavilion for indoor soccer, batting cages, ample stadium seating, playground, and an indoor select-service restaurant.

Elk Grove Regional Park (Elk Grove, CA)

The 170-acre park features 12 baseball/softball fields located just south of the downtown Sacramento area. A pond located in the middle of the park separates half of the baseball/softball fields, which requires a considerable walk when traveling from one field to another.

Ken Mercer Sports Park (Pleasanton, CA)

Ken Mercer Sports Park is one of the largest amateur sports facilities in the greater northern California area. With 25 baseball/softball fields and 12 multi-purpose fields, Ken Mercer is capable of hosting large national tournaments.



Big League Dreams Ballpark



Elk Grove Regional Park

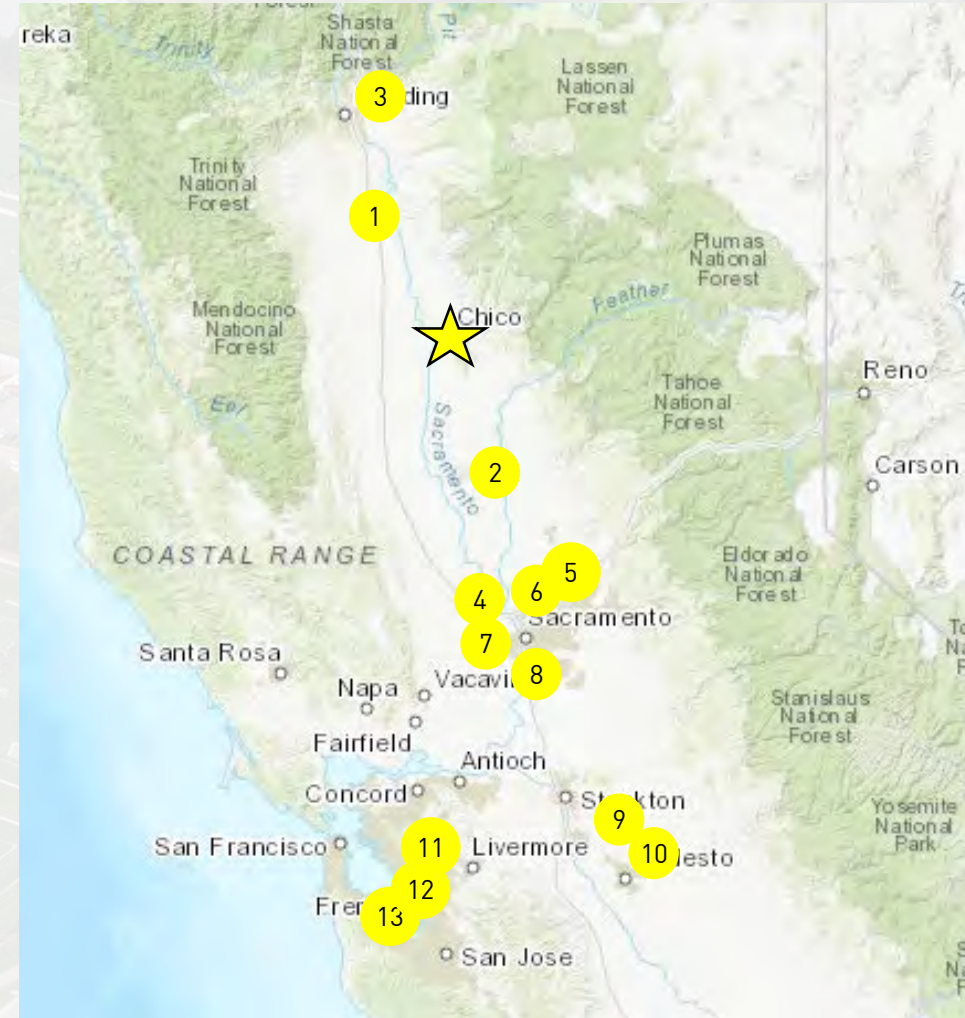


Ken Mercer Sports Park

4. COMPETITIVE FACILITIES: Multipurpose Field Facilities

Thirteen multipurpose (rectangle) field facilities were identified as potential competitive facilities throughout the greater northern California region. On average these facilities offer six full-size and two youth rectangle fields (eight total fields) per complex. The sheer quantity of competitive regional multipurpose rectangle field complexes provides a significant level of competition for a potential new complex in Chico.

Facility	City, State	Rectangle		Total # of Fields	Distance to Chico (miles)
		Full-Size	Youth		
1 Red Bluff Soccer Fields	Red Bluff, CA	4	--	4	42
2 Wheeler Auto Soccer Complex	Marysville, CA	7	7	14	49
3 California Soccer Park	Redding, CA	4	--	4	73
4 Woodland Sports Park	Woodlands, CA	--	5	5	82
5 Maidu Regional Park	Roseville, CA	5	--	5	84
6 Cherry Island Soccer Complex	Rio Linda, CA	10	--	10	88
7 Davis Soccer Complex	Davis, CA	7	1	8	97
8 Hal Bartholomew Park	Elk Grove, CA	4	--	4	107
9 Mistlin Sports Park	Ripon, CA	4	8	12	157
10 Grogan Community Park	Modesto, CA	4	4	8	167
11 Ken Mercer Sports Park	Pleasanton, CA	10	2	12	176
12 Central Park Sports Complex	Fremont, CA	10	--	10	180
13 Twin Creeks Sports Complex	Sunnyvale, CA	7	5	12	192
AVERAGE		6	2	8	115



4. COMPETITIVE FACILITIES: Multipurpose Field Facilities

Red Bluff Soccer Fields (Red Bluff, CA)

The Red Bluff Soccer Fields are primarily used by the local Red Bluff Youth Soccer Association. The facility is able to fit up to four full-size fields, but the field configurations vary each year depending upon the number of participants per age group.

Wheeler Auto Soccer Complex (Marysville, CA)

The Wheeler Auto Soccer Complex offers seven full-size and seven youth soccer fields, and regularly hosts large tournaments that largely draw from the greater regional marketplace, but will also occasionally attract teams from throughout the country.

Cherry Island Soccer Complex (Rio Linda, CA)

The Cherry Island Soccer Complex is located adjacent to an 18-hole golf course. The complex features 10 full-size fields in addition to two picnic areas, concession stand, and space for outside food vendors. Tournaments have regularly attracted 100 teams or more.

Mistlin Sports Park (Ripon, CA)

Mistlin Sports Park features 12 multi-purpose grass fields and six tournament-quality baseball/softball fields. The sports park was developed outside of Ripon to allow for future development of the area to occur. The 80-acre community space also features a gazebo, play area with splash pad, and restrooms.



Wheeler Auto Soccer Complex



Cherry Island Soccer Complex

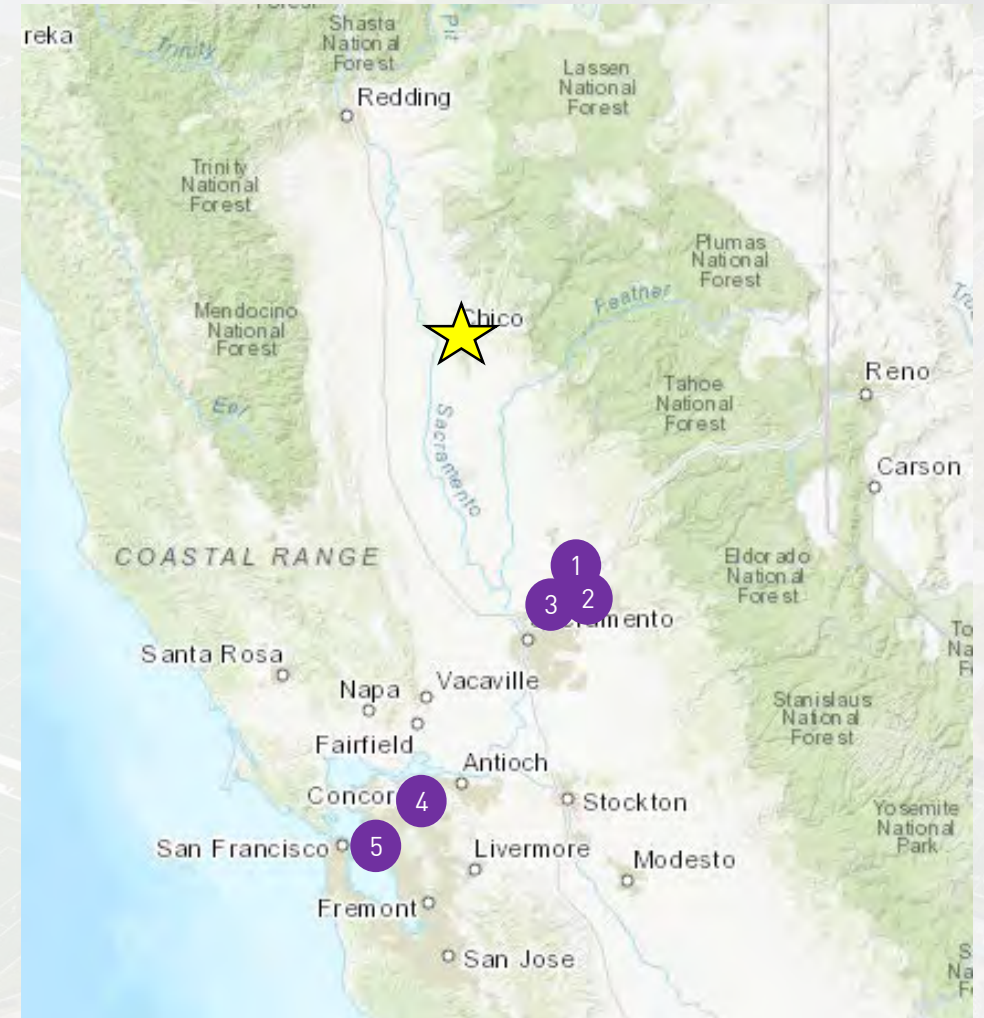


Mistlin Sports Park

4. COMPETITIVE FACILITIES: Indoor Court Facilities

There is a limited supply of dedicated indoor court facilities throughout the greater northern California area, with most tournaments being hosted within court space at local school district facilities. A total of five facilities offer four courts or more at their facility. The greater Sacramento area offers three facilities that offer a combined total of 25 courts, including the 12-court Jackson Sports Academy in McClellan.

Facility	City, State	Basketball	Volleyball	Distance To Chico (miles)
1 Hardwood Palace	Rocklin, CA	8	16	86
2 Courtside Basketball Center	Rocklin, CA	5	10	86
3 Jackson Sports Academy	McClellan, CA	12	24	92
4 Ultimate Fieldhouse	Walnut Creek, CA	4	8	149
5 JAMTOWN	Oakland, CA	4	8	159
AVERAGE		7	13	114



4. COMPETITIVE FACILITIES: Indoor Court Facilities

Hardwood Palace (Rocklin, CA)

Hardwood Palace is a state-of-the-art basketball facility located just outside of Sacramento. The 70,000 sq. ft. facility features 8 hardwood courts, padded benches for spectators, meeting rooms, and a café. All eight courts can also be converted for volleyball, futsal, or any other sport that requires a hardwood playing surface.

Jackson Sports Academy (McClellan, CA)

Located in McClellan Park, adjacent to Sacramento McClellan Airport, the Jackson Sports Academy features 12 basketball courts capable of hosting large regional and national tournaments. The facility is also able to host concerts, gymnastic meets, car shows, and other flat floor sporting tournaments.

Ultimate Fieldhouse (Walnut Creek, CA)

Built in 2015, the Ultimate Fieldhouse features four basketball courts and a separate training court for smaller camps and clinics. The Ultimate Fieldhouse also hosts its own programming with leagues such as basketball, volleyball, pickleball, badminton, Special Olympics, etc.

JAMTOWN (Oakland, CA)

JAMTOWN is a four-court basketball facility located in downtown Oakland. It has hosted numerous local and regional youth basketball tournaments. During the week, JAMTOWN hosts many camps and clinics while leaving a couple of gyms available for public use.



Jackson Sports Academy



Ultimate Fieldhouse

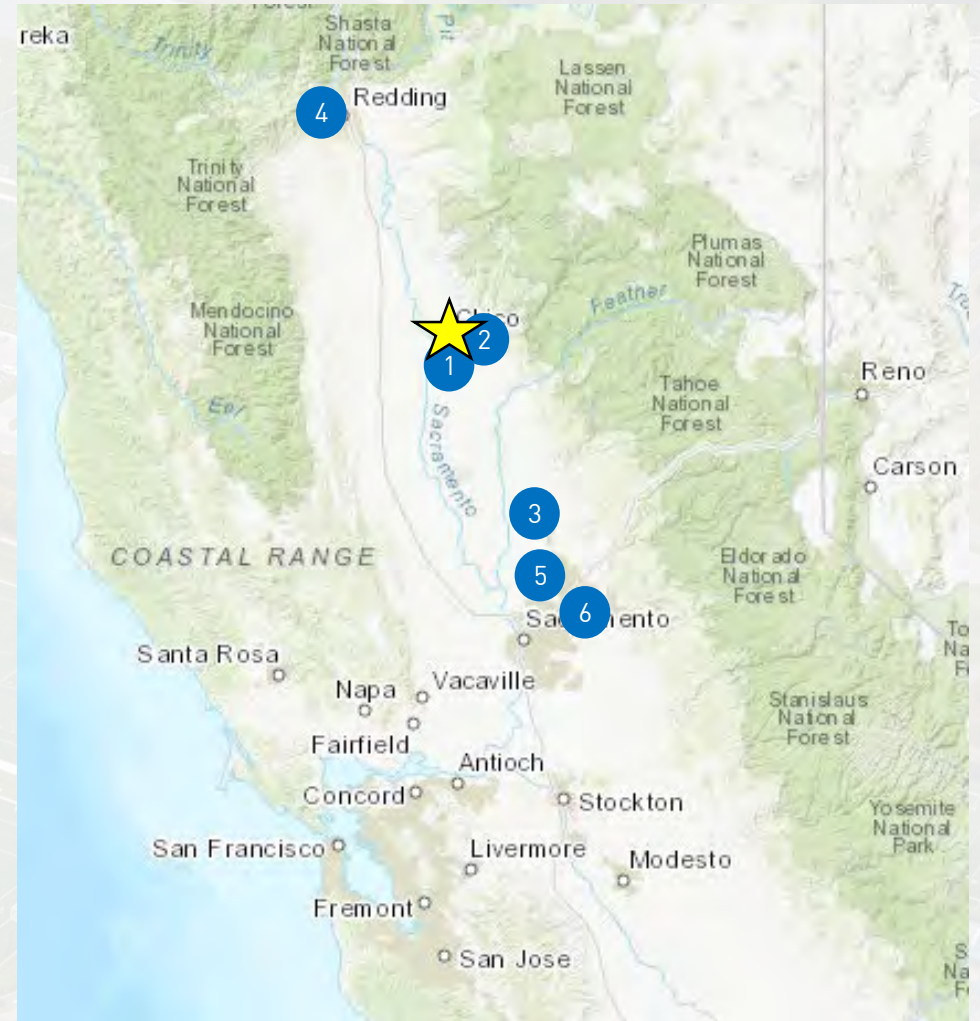


JAMTOWN Oakland

4. COMPETITIVE FACILITIES: Aquatic Facilities

CSL identified six aquatic facilities that could potentially compete for swimming meets and competitions in northern California. While the Dwight Brinson Swim Center and Paradise Pool are within close proximity to Chico, a low amount of competition would be created due to high amounts of recreational programming at each facility. Competition levels increase as competitive organizations seek 50-meter pools to host large regional and national swimming events.

Facility	City, State	# of Pools	Pool Size(s)	# of Lanes	Distance to Chico (miles)
1 Dwight Brinson Swim Center	Durham, CA	1	25Y	6	7
2 Paradise Pool	Paradise, CA	1	25Y	6	15
3 Gauche Aquatic Center	Yuba City, CA	2	25Y	10	47
4 Redding Aquatics Center	Redding, CA	2	50M/25Y	8/6	75
5 Roseville Aquatics Complex	Roseville, CA	2	50M/25Y	9/5	83
6 Folsom Aquatic Center	Folsom, CA	3	50M/25Y	8/3	95
AVERAGE					54



4. COMPETITIVE FACILITIES: Aquatic Facilities

Dwight Brinson Swim Center (Durham, CA)

The Dwight Brinson Swim Center features a six lane, 25-yard competitive swimming pool, diving well with two diving boards, and a small wake pool area. The Swim Center is open for recreational use seven days a week; however, the Durham Dolphins utilize this space as their main practice facility.

Gauche Aquatic Center (Yuba City, CA)

Gauche Aquatic Center is a part of the Yuba City Parks and Recreation Department and features a 10-lane, 25-yard competitive swimming pool, tube slide, and splash pad with a zero-depth entry. The aquatic center is home to the Feather River Aquatic Club, which uses the facility for competitive programming.

Redding Aquatic Center (Redding, CA)

The Redding Aquatic Center is home to the Redding Swim Team and Redding Ducks. The facility features an eight-lane, 50-meter Olympic size pool, 25-yard warm-up/competitive pool with six lanes, tube slide, and splash pad. The Aquatic Center also serves as the largest authorized provider of the American Cross Learn-to-Swim Program in Shasta County.

Folsom Aquatic Center (Folsom, CA)

Located in a highly residential area, the Folsom Aquatic Center is a state-of-the-art aquatic facility that features an 8-lane, 50-meter Olympic size pool with a removeable bulkhead, warmup/25-yard pool, tube slide, and splash pad with a zero-depth entry. The Aquatic Center is home to four competitive swim teams, but also offers daily recreational programming and activities.



Guache Aquatic Center



Redding Aquatic Center



Folsom Aquatic Center

4. COMPETITIVE FACILITIES: Conclusions

The viability of any potential new sports and recreation facilities in Chico is largely dependent on the market's position in the competitive sports complex landscape, which directly influences its ability to develop league play and attract tournaments, meets and competitions from the regional market. Important aspects of the competitive region as they relate to the potential opportunity for developing a new sports and recreation facilities in Chico include:

- Regional draw to Chico from both the greater San Francisco and Sacramento area is highly competitive due to the amount of large amateur sports facilities surrounding each market.
- Redding is well established in attracting large baseball/softball events/tournaments, while Marysville offers a strong presence in attracting soccer and other multisport field tournaments. USL East Bay is an incoming soccer team expecting to begin play in the United Soccer League in 2021 and may develop a complex and training program that could offer additional competition for large regional tournaments.
- There is a lack of indoor court facilities within the greater northern California area, indicating an opportunity to compete for regional tournaments with the addition of a new indoor court facility. However, much of the existing tournament activity takes place within high school or collegiate gymnasiums and/or large exhibition halls (e.g., Sacramento Convention Center).
- Any type of aquatic facility would compete with both local and regional facilities given the proximity to Paradise Pool and the Dwight Brinson Swim Center.

5. COMPARABLE FACILITIES AND MARKETS



5. COMPARABLE FACILITIES: Baseball/Softball Facilities

Certain inferences can be made by reviewing comparable recreational and amateur sports facilities operating in markets throughout the country of a similar size and/or geographic positioning to Chico. A range of sports tourism and local recreation facilities were selected in order to provide a deeper understanding into the difference in operational and financial activity among the various types of facilities. Each facility reviewed was selected based on its number of fields, courts or pools, construction cost, and opening year. The following list contains identified baseball/softball facilities, while subsequent pages contain comparable multisport rectangle fields, indoor court facilities and indoor/outdoor community aquatic centers.

Facility	City, State	Year Opened	Const. Cost (in millions)	Number of Triangle Fields
Chappapeela Sports Park	Hammond, LA	2013	\$10.0	12
Rocky Mount Sports Complex	Rocky Mount, NC	2006	\$13.0	11
East Cobb Baseball Complex	Marietta, GA	2001	\$9.7	8
Rio Vista Community Park	Peoria, AZ	2004	\$8.7	8
Plano Sports Authority Star Center	Plano, TX	2002	\$10.8	8
Howard M. Terpenning Recreation Complex	Beaverton, OR	1978	N/A	7
Harmony Sports Complex	Vancouver, WA	N/A	N/A	7
North Myrtle Beach Park and Sports Complex	North Myrtle Beach, SC	2014	\$22.0	6
City of Redding Sports Complex	Redding, CA	2004	\$15.8	5
RecPlex	Branson, MO	2005	\$12.9	4
Average		2003	\$12.9	8

5. COMPARABLE FACILITIES: Triangle Field Market Demographics

POPULATION				
Market	15-minute	30-minute	60-minute	180-minute
Peoria, AZ	668,941	2,271,067	4,178,727	6,462,350
Plano, TX	424,417	2,132,397	6,197,426	10,604,751
Beaverton, OR	341,666	1,072,626	2,571,909	5,271,622
Marietta, GA	204,094	921,752	3,882,289	12,690,637
Vancouver, WA	182,941	964,407	2,316,447	6,097,688
Chico, CA	106,960	178,887	410,796	6,714,010
Redding, CA	102,060	170,692	238,454	3,704,996
Hammond, LA	71,602	262,936	1,516,622	5,952,797
Rocky Mount, NC	70,785	228,448	1,410,293	10,626,050
Little River, SC	43,116	235,650	510,085	5,644,588
Branson, MO	21,813	86,947	544,193	3,147,314
Average	213,100	834,700	2,336,600	7,020,300
Rank (Out of 11)	6	9	10	4

AVG. HOUSEHOLD INCOME				
Market	15-minute	30-minute	60-minute	180-minute
Plano, TX	\$122,596	\$109,612	\$91,045	\$81,713
Beaverton, OR	\$98,637	\$95,414	\$85,451	\$80,084
Marietta, GA	\$95,038	\$97,365	\$87,882	\$73,465
Vancouver, WA	\$85,601	\$77,421	\$87,123	\$81,067
Little River, SC	\$68,363	\$64,970	\$62,374	\$65,769
Peoria, AZ	\$67,878	\$72,400	\$77,969	\$73,888
Chico, CA	\$66,677	\$65,488	\$63,796	\$90,620
Redding, CA	\$66,057	\$68,002	\$64,564	\$79,188
Branson, MO	\$60,906	\$59,465	\$61,268	\$59,573
Hammond, LA	\$60,128	\$77,789	\$74,852	\$66,070
Rocky Mount, NC	\$58,361	\$56,972	\$67,475	\$71,228
Average	\$78,400	\$77,900	\$76,000	\$73,200
Rank (Out of 11)	7	8	9	1

CORPORATE BASE				
Market	15-minute	30-minute	60-minute	180-minute
Plano, TX	17,122	79,293	204,635	348,243
Peoria, AZ	15,130	63,715	127,590	189,917
Beaverton, OR	10,539	48,456	96,584	190,335
Marietta, GA	8,958	41,872	162,645	456,752
Redding, CA	5,870	7,632	9,954	125,152
Vancouver, WA	5,209	35,554	88,248	215,795
Chico, CA	5,140	8,111	15,699	226,547
Hammond, LA	2,965	10,362	58,100	211,906
Rocky Mount, NC	2,927	7,357	48,811	347,227
Little River, SC	2,853	11,420	21,280	190,404
Branson, MO	2,111	4,509	22,114	117,636
Average	7,400	31,000	84,000	239,300
Rank (Out of 11)	7	8	10	4

Note: Sorted by 15-minute drive times.
Source: Esri, 2018.

5. COMPARABLE FACILITIES: Multipurpose Field Facilities

Facility	City, State	Year Opened	Const. Cost (in millions)	Number of Rectangle Fields
Chappapeela Sports Park	Hammond, LA	2013	\$10.0	23
Elizabethtown Sports Park	Elizabethtown, KY	2012	\$31.0	10
Rio Vista Community Park	Peoria, AZ	2004	\$8.7	10
Dwight Merkel Complex	Spokane, WA	2007 ⁽¹⁾	\$11.0	8
Rocky Mount Sports Complex	Rocky Mount, NC	2006	\$13.0	8
Rocky Top Sports World	Gatlinburg, TN	2014	\$20.0	8
Old Settlers Park	Round Rock, TX	2007	N/A	7
U.S. Cellular Community Park	Medford, OR	2007	\$32.5	6
Howard M. Terpenning Recreation Complex	Beaverton, OR	1978	N/A	5
California Soccer Park	Redding, CA	2004	\$10.0	4
Average		2005	\$17.0	9

(1) Complex was originally built in the 1980's, but underwent a major renovation in 2007.

5. COMPARABLE FACILITIES: Multipurpose Field Market Demographics

POPULATION				
Market	15-minute	30-minute	60-minute	180-minute
Peoria, AZ	668,941	2,271,067	4,178,727	6,462,350
Beaverton, OR	341,666	1,072,626	2,571,909	5,271,622
Round Rock, TX	271,375	1,152,432	2,443,431	16,036,223
Spokane, WA	157,066	451,990	678,226	1,631,904
Medford, OR	118,256	199,072	300,594	1,097,611
Chico, CA	106,960	178,887	410,796	6,714,010
Redding, CA	102,060	170,692	238,454	3,704,996
Hammond, LA	71,602	262,936	1,516,622	5,952,797
Rocky Mount, NC	70,785	228,448	1,410,293	10,626,050
Elizabethtown, KY	56,189	148,618	1,183,890	10,601,819
Gatlinburg, TN	6,114	22,953	165,407	5,114,507
Average	186,400	598,100	1,468,800	6,650,000
Rank (Out of 11)	6	8	8	4

AVG. HOUSEHOLD INCOME				
Market	15-minute	30-minute	60-minute	180-minute
Beaverton, OR	\$98,637	\$95,414	\$85,451	\$80,084
Round Rock, TX	\$96,002	\$92,394	\$88,984	\$84,733
Elizabethtown, KY	\$71,484	\$65,007	\$64,987	\$70,549
Peoria, AZ	\$67,878	\$72,400	\$77,969	\$73,888
Chico, CA	\$66,677	\$65,488	\$63,796	\$90,620
Redding, CA	\$66,057	\$68,002	\$64,564	\$79,188
Medford, OR	\$61,917	\$66,676	\$64,803	\$63,503
Gatlinburg, TN	\$60,577	\$58,924	\$56,627	\$60,851
Hammond, LA	\$60,128	\$77,789	\$74,852	\$66,070
Spokane, WA	\$60,071	\$72,478	\$71,878	\$69,862
Rocky Mount, NC	\$58,361	\$56,972	\$67,475	\$71,228
Average	\$70,100	\$72,600	\$71,800	\$72,000
Rank (Out of 11)	5	8	10	1

CORPORATE BASE				
Market	15-minute	30-minute	60-minute	180-minute
Peoria, AZ	15,130	63,715	127,590	189,917
Beaverton, OR	10,539	48,456	96,584	190,335
Spokane, WA	7,208	18,373	26,045	59,443
Round Rock, TX	6,770	36,855	79,201	519,909
Redding, CA	5,870	7,632	9,954	125,152
Medford, OR	5,781	8,829	12,876	44,560
Chico, CA	5,140	8,111	15,699	226,547
Hammond, LA	2,965	10,362	58,100	211,906
Rocky Mount, NC	2,927	7,357	48,811	347,227
Elizabethtown, KY	2,547	4,525	41,659	356,702
Gatlinburg, TN	762	1,979	6,839	181,216
Average	6,000	20,800	50,800	222,600
Rank (Out of 11)	7	7	8	4

Note: Sorted by 15-minute drive times.
Source: Esri, 2018.

5. COMPARABLE FACILITIES: Indoor Court Facilities

Facility	City, State	Year Opened	Const. Cost (in millions)	Number of Basketball Courts	Number of Volleyball Courts
Sports Pavilion Lawrence	Lawrence, KS	2014	\$24.5	8	16
Rocky Mount Event Center	Rocky Mount, NC	2018	\$48.0	8	16
Hardwood Palace	Rocklin, CA	2007	N/A	8	16
Greensboro Sportsplex	Greensboro, NC	2002	\$6.0	8	16
Pleasant Prarie RecPlex	Pleasant Prairie, WI	2000	\$14.0	8	16
UW Health Sports Factory	Rockford, IL	2016	\$24.4	8	16
Howard M. Terpenning Recreation Complex	Beaverton, OR	Various ⁽¹⁾	N/A	6	12
Willamalane Center for Sports and Recreation	Springfield, OR	2010	\$2.0	6	11
Round Rock Sports Center	Round Rock, TX	2014	\$14.5	6	12
Civic Park	Eugene, OR	2020	\$37.0	4	8
Average		2011	\$21.3	7	14

(1) Athletic facilities were originally constructed in 1978, with various renovations and expansions over the period since.

5. COMPARABLE FACILITIES: Indoor Court Facility Market Demographics

POPULATION				
Market	15-minute	30-minute	60-minute	180-minute
Beaverton, OR	341,666	1,072,626	2,571,909	5,271,622
Round Rock, TX	311,086	1,187,423	2,434,061	15,968,866
Rocklin, CA	241,499	929,566	2,471,980	13,356,999
Greensboro, NC	210,228	671,302	2,032,824	11,874,538
Rockford, IL	196,145	364,711	1,086,686	16,500,862
Eugene, OR	184,565	335,307	518,331	4,237,005
Springfield, OR	124,991	314,838	525,237	4,244,281
Pleasant Prairie, WI	114,065	714,333	3,829,992	15,454,517
Chico, CA	106,960	178,887	410,796	6,714,010
Lawrence, KS	80,833	288,371	1,947,177	4,987,518
Rocky Mount, NC	68,850	216,171	1,321,614	10,546,540
Average	187,400	609,500	1,874,000	10,244,300
Rank (Out of 11)	9	11	11	7

AVG. HOUSEHOLD INCOME				
Market	15-minute	30-minute	60-minute	180-minute
Rocklin, CA	\$101,133	\$88,244	\$86,842	\$103,544
Beaverton, OR	\$98,637	\$95,414	\$85,451	\$80,084
Round Rock, TX	\$95,186	\$92,671	\$89,189	\$85,031
Pleasant Prairie, WI	\$83,162	\$91,868	\$94,193	\$85,050
Lawrence, KS	\$74,075	\$68,526	\$80,004	\$72,220
Chico, CA	\$66,677	\$65,488	\$63,796	\$90,620
Eugene, OR	\$65,085	\$67,129	\$65,997	\$78,293
Greensboro, NC	\$61,731	\$68,266	\$67,190	\$68,289
Springfield, OR	\$59,718	\$67,052	\$65,914	\$78,219
Rockford, IL	\$59,412	\$69,577	\$75,594	\$84,116
Rocky Mount, NC	\$57,401	\$57,120	\$66,186	\$71,256
Average	\$75,600	\$76,600	\$77,700	\$80,600
Rank (Out of 11)	6	10	11	2

CORPORATE BASE				
Market	15-minute	30-minute	60-minute	180-minute
Beaverton, OR	10,539	48,456	96,584	190,335
Greensboro, NC	9,102	25,634	69,439	389,968
Round Rock, TX	9,049	40,524	78,612	525,950
Eugene, OR	8,968	12,924	19,651	159,834
Rocklin, CA	7,831	30,580	78,355	472,998
Rockford, IL	7,198	12,150	37,164	582,487
Springfield, OR	5,406	12,288	19,805	160,290
Chico, CA	5,140	8,111	15,699	226,547
Pleasant Prairie, WI	3,201	22,620	147,113	542,737
Lawrence, KS	3,139	10,726	70,733	182,993
Rocky Mount, NC	2,805	6,858	46,386	344,948
Average	6,700	22,300	66,400	355,300
Rank (Out of 11)	8	10	11	7

Note: Sorted by 15-minute drive times.
Source: Esri, 2018.

5. COMPARABLE FACILITIES: Aquatic Facilities

Facility	City, State	Year Opened	Const. Cost (in millions)	Number of Pools	Pool Size	Number of Lanes
SPIRE Institute	Geneva, OH	2011	N/A	2	50M/25Y	10/6
St. Peters Rec-Plex	St. Peters, MO	1994	\$18.5	2	50M	8
Tualatin Hills Aquatic Center	Beaverton, OR	1978	N/A	1	50M	10
SC Johnson Community Aquatic Center	Racine, WI	2018	\$6.5	3	25Y	8
Cascade Bay	Eagan, MN	1999	\$7.0	2	25Y	6
Holland Aquatic Center	Holland, MI	1999	N/A	4	50M/25Y	10/6
Alga Norte Aquatic Center	Carlsbad, CA	2013	N/A	2	50M/25Y	8/12
Brentwood Family Aquatic Center	Brentwood, CA	2000	N/A	3	25Y/25Y/25Y	10/3/3
Gauche Aquatic Center	Yuba City, CA	2007	\$14.5	2	25Y	10
George F. Haines International Swim Center	Santa Clara, CA	1968	N/A	3	50M/25Y/25Y	9/6/6
Average		1996	\$11.6	2		8

[1] Aquatic Center was originally built in 1968, but underwent a major renovation in 1999. Currently seeking funding for another renovation.

5. COMPARABLE FACILITIES: Aquatic Facility Market Demographics

Market	POPULATION			
	15-minute	30-minute	60-minute	180-minute
Santa Clara, CA	645,681	2,053,451	4,404,074	13,340,954
Eagan, MN	363,350	1,875,092	3,457,928	6,269,213
Beaverton, OR	341,666	1,072,626	2,571,909	5,271,622
Carlsbad, CA	247,591	916,683	3,825,112	21,566,192
St. Peters, MO	232,316	1,073,049	2,603,813	6,156,918
Brentwood, CA	169,778	407,978	3,264,523	14,331,311
Racine, WI	158,025	409,212	2,711,990	14,908,918
Holland, MI	107,366	270,656	1,358,194	17,020,530
Chico, CA	106,960	178,887	410,796	6,714,010
Geneva, OH	34,212	261,271	1,847,616	12,116,265
Yuba City, CA	23,138	401,028	2,248,889	13,104,011
Average	232,300	874,100	2,829,400	12,408,600
Rank (Out of 11)	9	11	11	8

Market	AVG. HOUSEHOLD INCOME			
	15-minute	30-minute	60-minute	180-minute
Santa Clara, CA	\$645,681	\$2,053,451	\$4,404,074	\$13,340,954
Eagan, MN	\$363,350	\$1,875,092	\$3,457,928	\$6,269,213
Beaverton, OR	\$341,666	\$1,072,626	\$2,571,909	\$5,271,622
Carlsbad, CA	\$247,591	\$916,683	\$3,825,112	\$21,566,192
St. Peters, MO	\$232,316	\$1,073,049	\$2,603,813	\$6,156,918
Brentwood, CA	\$169,778	\$407,978	\$3,264,523	\$14,331,311
Racine, WI	\$158,025	\$409,212	\$2,711,990	\$14,908,918
Holland, MI	\$107,366	\$270,656	\$1,358,194	\$17,020,530
Chico, CA	\$106,960	\$178,887	\$410,796	\$6,714,010
Geneva, OH	\$34,212	\$261,271	\$1,847,616	\$12,116,265
Yuba City, CA	\$23,138	\$401,028	\$2,248,889	\$13,104,011
Average	\$232,300	\$874,100	\$2,829,400	\$12,408,600
Rank (Out of 11)	9	11	11	8

Market	CORPORATE BASE			
	15-minute	30-minute	60-minute	180-minute
Santa Clara, CA	29,966	74,743	155,565	463,594
Eagan, MN	13,251	72,299	123,062	243,492
Carlsbad, CA	11,957	36,756	137,315	731,645
Beaverton, OR	10,539	48,456	96,584	190,335
St. Peters, MO	8,161	38,248	89,714	223,269
Chico, CA	5,140	8,111	15,699	226,547
Racine, WI	4,464	11,212	96,686	524,065
Holland, MI	4,140	9,314	46,957	580,792
Brentwood, CA	3,673	8,604	102,180	497,071
Geneva, OH	1,169	9,480	67,959	428,110
Yuba City, CA	379	12,506	73,534	466,982
Average	8,800	32,200	99,000	434,900
Rank (Out of 11)	6	11	11	9

Note: Sorted by 15-minute drive times.
Source: Esri, 2018.

6. MARKET DEMAND ANALYSIS



6. MARKET DEMAND: Overview

Any potential new sports and recreation facility development in Chico has the opportunity to better accommodate a wide variety of amateur sports events, and as a result, the analysis of potential market opportunities must take a relatively broad focus. While community recreational facilities provide important opportunities for both youth and adults throughout the greater regional marketplace, a critical mass of fields/facilities can provide an opportunity for the Chico destination to position itself to attract sports tourism-related event activity and the associated economic and other community benefits. An essential element of this analysis is to explore potential ways to balance the needs of the local community with the opportunity to generate additional funding support of construction debt service and/or ongoing operational deficits through the attraction of non-local spending.

In order to provide guidance to CARD and other stakeholders on potential market opportunities that could be pursued, we have conducted direct outreach to key local, state, regional and national athletic associations and organizations that run sports programs, leagues, tournaments, competitions and meets that would have a potential interest in new Chico sports and recreation facilities.



6. MARKET DEMAND: Market Demand Analysis

The market demand analysis associated with potential new sports and recreation facilities in Chico included a detailed set of telephone surveys with planners representing potential baseball, softball, soccer, lacrosse, rugby, football, flag football, ultimate Frisbee, field hockey, basketball, volleyball, wrestling, martial arts, cheerleading, gymnastics, dance, swimming and other sports games, tournaments, meets, camps and other such events. Specifically, the key components of the primary market research completed for potential new sports and recreation facilities in Chico included:

1. Site visit and meetings with CARD and EBHB representatives, the City of Chico, Chico State University, the Chico Unified School District, the Chico Chamber of Commerce, the Chico Downtown Business Association, Choose Chico, Butte College, various recreational and amateur sporting groups, local hoteliers and business leaders, and other visitor industry and community stakeholders.
2. Completed approximately 50 telephone and in-person interviews with organizations representing the following activities:
 - a. Baseball;
 - b. Softball;
 - c. Soccer;
 - d. Lacrosse;
 - e. Rugby;
 - f. Football/flag football;
 - g. Ultimate Frisbee;
 - h. Field hockey;
 - i. Basketball;
 - j. Volleyball;
 - k. Wrestling;
 - l. Martial arts;
 - m. Cheerleading;
 - n. Gymnastics;
 - o. Dance;
 - p. Swimming; and,
 - q. Other such sports.

The detailed interviews were completed with a survey-based technique that provides a detailed understanding the willingness of prospective groups to use potential new Chico sports and recreation facilities, their overall perceptions of Chico as a potential host community for their event(s), the physical facility requirements needed to accommodate their event and any requirements of the destination/community.

The focus of much of the remainder of this section is focused on quantified survey data associated with the four primary groupings of surveys completed for this study: 1) potential triangle field (baseball/softball) event organizers; 2) potential rectangle field (multisport) event organizers; 3) potential indoor court event organizers; and, 4) pool/aquatics event organizers. These events would be expected to represent the logical targets for new local user groups and non-local, economic impact generating activity for Chico sports and recreation facilities. Further detail relating to event organizers' responses is presented on the following pages.



6. MARKET DEMAND: Organizations Contacted

3D Lacrosse
AAU Baseball
AAU Boys Basketball
AAU Football
AAU Girls Basketball
AAU Gymnastics
AAU Inland Empire Karate
AAU Martial Arts
AAU Soccer - California Districts
AAU Softball
AAU Volleyball
Ability First
Athletic Horizons Gymnastics Center
Azad's Martial Arts Center
Bay Area Disc Association (BADA)
Blackout Volleyball Club
Butte College
Butte United
CA District 47 Little League
Cal North Competitive Soccer League (CCSL)
California Amateur Softball Association (CASA)
California Football Academy
California Gymnastics Academy
California State Soccer Cups
California Ultimate Association
Central Baseball
Chico Aquajets
Chico Area Swim Association
Chico Blazin' Heat
Chico Bullpen Baseball Academy

Chico Cal Soccer
Chico Central Little League
Chico Cheer
Chico Creek Dance Centre
Chico East Side Little League
Chico Futsal/Soccer
Chico Heat
Chico High Swim
Chico Jr. Panthers
Chico Kodokan
Chico Kuk Sul Academy
Chico Matrix Volleyball
Chico Mighty Oaks RFC & Chico Men's Rugby Club
Chico Nuts American Legion Baseball
Chico Oaks Youth Rugby
Chico Peewees
Chico Pickleball
Chico Rice American Legion Baseball
Chico Rugby
Chico Senior Softball
Chico Softball Little League
Chico State Athletics
Chico Suns American Legion Baseball
Chico Tarheels
Chico Ultimate Foundation
Chico Unified School District
Chico Velo Cycling Club
Chico Westside Little League
Chico Youth Soccer League (CYSL)
Chico Youth Softball

City of Chico
Club Chico Volleyball
Do-It Leisure
Durham Dolphins
Dynamix Volleyball Club
Flight Elite Basketball Club
Haley's Martial Arts Center
Hype Dance Studio
Jujitsu Nibukikan Dan Zan Ryu
Jung's ATA Martial Arts of Southport
Morning Sun Martial Arts & Education Center
Never Enough Athletics
Nor Cal Bears Basketball
Nor Cal Elite Basketball
Nor Cal USA Softball
NorCal Academy
Nor-Cal Youth Sports
North State Soccer
North Valley Wrestling Academy
Northern Area Wrestling Association
Northern California Federation - Youth Football & Cheerleading
Northern California Field Hockey Association
Northern California Junior Lacrosse Association
Northern California Men's Collegiate Gymnastics
Northern California Nisei Athletic Union Basketball League
Northern California Rugby Football Union
Northern California Swim League
Northern California USSSA
Northern California Volleyball Association (NCVA)
Northern California Volleyball Club

Northern California Women's Gymnastics Association
Oroville Orcas Swim Team
Paradise Piranhas
Pickleball Northern California
Pleasant Valley High Swim
Ridgecrest Elite Volleyball Club
Rugby Nor Cal
Sacramento Ultimate Players Association (SUPA)
Seishindo Karate
Showtime Hoops
Sierra Nevada Swimming
Soccer Across America
Soccer Olympic Development Program (ODP)
Southern California Men's Gymnastics Association
Southern California Volleyball Association (SCVA)
Southern California Youth Rugby (SCYR)
Special Olympics
StandAlone MMA
TopSoccer
US Lacrosse
USA Gymnastics Region 1 - Acrobatic
USA Gymnastics Region 1 - Rhythmic
USA Gymnastics Region 2 - Trampoline & Tumbling
USA Men's Gymnastics Region 1
USA Softball of Central California
USA Swimming - Pacific Swimming Zone 4
USA Water Polo
USA Women's Gymnastics Region 1
Velocity Volleyball Club

6. MARKET DEMAND: Triangle Field Sports

15

completed interviews

380 / 1,350

average / most participants per event

1.5 – 5.0

average number of spectators per participant

4 to 8

average number of fields required per event

50%

Preferred artificial turf to natural grass;
25% preferred natural grass,
25% favored a mix

Summary of Key Findings

- Potential events include adult and youth baseball and softball amateur sports tournaments, leagues and practices.
- Completed telephone interviews with planners representing a variety of leagues, teams, tournaments and other events.
- Moderate to strong demand noted among local user groups; somewhat more moderate demand noted among non-local user groups and tournament organizers.
- Respondents could envision utilizing the proposed facility for a variety of event activity including practices, league games and potential tournaments.
- On average, organizers interested in potentially bringing tournaments to Chico indicated that each would last 2 to 3 days and be held on weekends.
- Tournaments would be expected to attract approximately 380 participants and 1,200 spectators per event.
- Youth softball and baseball organizations indicated the greatest interest in utilizing a venue for tournaments and regular league play including weekly practices.
- Community Park could serve as support/overflow field space for larger youth softball tournaments while Hooker Oak Park could help support larger baseball tournaments.
- Most event organizers preferred artificial turf or a mix of both turf and natural grass, noting the turf was easier to maintain and sustained field conditions better than natural grass in inclement weather.
- The pinwheel orientation was favored by most organizers because it created a central location for concessions, seating, and information. Lighting is required for most tournaments and league play.



6. MARKET DEMAND: Rectangle Field Sports

14

completed interviews

600/ 2,000

average / most participants per event

1.0 – 5.0

average number of spectators per participant

4 to 6

average number of fields required per event

50%

Favored a mix of natural grass and turf;
37% preferred artificial turf;
13% preferred natural grass

Summary of Key Findings

- Surveys of local, state, regional and national amateur sports organizations and event planners. Including soccer, football, lacrosse, field hockey, and rugby tournaments and leagues.
- Completed 14 interviews with planners representing leagues, tournaments, camps, clinics and other such events.
- Moderate demand (and growing) among local soccer clubs with limited access to enough quality fields to host consistent practices and games. Somewhat more limited demand among non-local tournament organizers.
- Lack of existing multisport field complex prevents local organizations from hosting tournaments and forces them to regularly travel outside Chico.
- On average, organizers were interested in potentially bringing 4 to 6 annual tournaments to Chico, with each lasting 1 to 3 days and typically being held on weekends.
- Tournaments would be expected to attract an average of approximately 600 participants and 1,800 spectators per event.
- There is moderate interest among regional soccer tournament organizers; however, facilities throughout Sacramento and the Bay Area present significant competition for hosting regional and national tournaments.
- Depending on the rain out policy, most organizers favored having a mixture of both artificial turf and natural grass fields in case of inclement weather. Field hockey organizers were the only group exclusively requiring artificial turf fields for events.



6. MARKET DEMAND: Indoor Sports

15

completed interviews

400 / 1,000

average / most participants per event

2.0 – 3.5

average number of spectators per participant

4 to 6

average number of courts required per event

60%

Preferred hardwood courts to sport-court;
20% preferred sport-court;
20% favored a mix of both

Summary of Key Findings

- Potential events include basketball, volleyball, gymnastics, cheerleading, martial arts, pickleball and other indoor amateur sports tournaments, meets and competitions.
- Completed 15 telephone interviews with planners representing leagues, tournaments, camps and clinics.
- Moderate to strong demand among local user groups; limited demand from non-local tournament organizers.
- Respondents noted the difficulty in scheduling regular games, practices and/or tournament activity within school facilities – primary function of CUSD facilities is to provide space for school functions, not recreational or amateur sports organizations.
- On average, organizers interested in potentially bringing tournaments to Chico indicated that each would last 2 to 4 days and typically be held on weekends.
- Tournaments would be expected to attract approximately 400 participants and 1,100 spectators per event.
- Various volleyball and basketball organizations mentioned that Chico's central location in Northern California could help to pull teams from Oregon and other surrounding states, creating the potential for larger, regional tournaments.



6. MARKET DEMAND: Swimming/Aquatics

6

completed interviews

8-10

average number of meets that could be hosted

100 / 150

average / most participants per event

1.5 – 3.0

average number of spectators per participant

25 yards

average size of competition pool required per event

Summary of Key Findings

- Potential events include swimming meets and competitions, local club utilization, learn-to-swim programs and other recreational uses.
- Moderate demand among local swim clubs and organizations for a publicly owned and operated pool in which to train, compete and host meets.
- Aquajets program annually has 130-150 kids participating in program, and is one of the longest running swim clubs in the country.
- Opportunity exists to host between 8 and 10 meets annually in Chico among the high school and club programs.
- Most meets would last two days and would be expected to attract approximately 100 participants and 225 spectators per event for smaller meets, or up to 400 to 600 swimmers for larger regional meets.
- Preference is for a 50-meter pool, though respondents indicated that a 25-yard pool could adequately fill existing and near-term future needs of the high school and club swim programs.
- Outdoor pool space is sufficient to accommodate demand; do not need to develop fully enclosed aquatics facility.
- CSU currently does not have the facilities necessary to field men's or women's swim teams; should these programs be reinstated in the future, it will be important to reassess the demand for aquatics facilities in the community and explore potential partnership opportunities with CSU and the City/CARD.



6. MARKET DEMAND: Conclusions

Based on the market interviews, surveys, research and analysis conducted for this study, we have developed the following set of findings and recommendations:

1. Existing inventory of Chico sports and recreational facilities are not adequate to accommodate the demand that currently exists. Further, the scattered nature of facilities throughout the community increases the cost to maintain facilities and limits the community's ability to attract and host non-local tournament activity.
2. Nearly 40 percent of Triangle Field activities offered by CARD have attracted more registrants than space available, and another 10 percent are at maximum capacity. Similarly, over 30 percent of Rectangle Field activities have been overbooked, and 5 percent are already at maximum capacity.
3. While available indoor court space appears adequate relative to industry standards, CUSD gymnasium space is becoming increasingly difficult to access.
4. Lack of a critical mass of indoor courts at any one location somewhat limits Chico's ability to attract non-local tournament activity.
5. With Chico and Pleasant Valley High Schools sharing one pool, privately owned In Motion Fitness has been hosting the local swim club (Aquajets) activities.
6. Existing fields and facilities throughout northern California presents moderate to strong levels of competition with respect to Chico's ability to attract/host tournaments, meets and other competitions that would draw from throughout the regional marketplace.
7. Primary focus of future development should be to better accommodate and grow existing local demand, specifically the analysis indicated unmet demand among the following sports/activities:

- Outdoor field demand:

- Baseball
- Softball
- Soccer
- Football
- Lacrosse & Other Multisport

- Indoor facility demand:

- Basketball
- Volleyball
- Cheer/Wrestling/Other

- Pool/aquatics facility demand:

- Swimming

8. Extreme sports and other alternative/niche sports and recreation were researched and evaluated through this analysis, as well. There are a number of new facility development/investment options that could be possible to address these segments; however, the "return-on-investment"—measured in terms of the ability to generate new economic impact and address current unmet facility need for local residents, relative to costs—does not presently justify strong consideration for their inclusion in the proposed project at this point in time.

7. MARKET SUPPORTABLE PROGRAM



7. PROGRAM ANALYSIS: Indicated Program

Based on the results of in-depth interviews with individuals representing local, regional and national sports organizations, discussions with local project stakeholders, the demographic and socioeconomic characteristics of the local and regional market and current participation levels in youth sports, it is estimated that new sports and recreational facilities in Chico would best meet the needs of the local and regional community. Analysis findings indicate that a market indicated facility program would include, in no particular order, adding the core elements shown below to the facilities that already exist in Chico:

Triangle Fields (Baseball/Softball)

- 4-6 softball/youth baseball fields (skinned infields) with:
 - 60', 65', 70' and 80' bases
 - 200' to 300' fences with available portable fencing
 - portable mounds
 - fully enclosed with fencing
 - covered dugouts (preferred)
- 1-2 baseball fields (grass infield) with:
 - 70', 80' and 90' bases
 - 320' fences with available portable fencing
- Natural grass infields/outfields
- Pinwheel configuration offering concessions, playground space, restrooms,
- Batting cages, warm-up areas, and other such amenities as appropriate
- Lighting for all fields to maximize utilization periods

Rectangle Fields (multisport)

- 4-6 multisport fields with:
 - Synthetic turf (at least two fields)
 - 345' x 210' per field
 - No fixed seating required.

Indoor Courts

- 4 hardwood courts (4 basketball/8 volleyball)
- Concession facilities
- Bleachers, netting, equipment, scoreboards, and other standard amenities
- Estimated 50,000 SF to 80,000 SF facility with approximately 35,000 to 60,000 SF of floor space

Pool/Aquatic Center

- 25-yard x 35-yard, 8-lane pool
- Shallow warm-up pool
- Zero-depth entry pool with recreational amenities such as water slides, climbing wall, spray toys, play structure(s), etc.

7. PROGRAM ANALYSIS: Synthetic Turf Advantages

- 1. Upfront vs. Ongoing Costs:** Although synthetic turf fields can cost \$600,000 or more (under a multi-field competitive bid) to install (versus \$200,000-\$300,000 for tournament-quality natural grass), annual maintenance for a synthetic turf field can cost between \$5,000-\$10,000, while natural grass can cost upwards of \$40,000 per year for rectangle fields and \$80,000 or more per year for tournament quality baseball fields (grass plus dirt).
- 2. Enhanced Usage & Marketability:** Fast moisture draining, recovery and durability of synthetic fields result in a significant reduction in cancelled tournaments and games due to inclement weather relative to natural grass/dirt fields. This leads to enhanced marketability for tournaments and higher, more consistent, use/attendance levels. Synthetic fields are estimated to increase the number of playable hours by approximately 50 percent due to the ability to withstand weather conditions.
- 3. Lifespan & Replacement:** Turf fields have a useful life of between 10 and 15 years. At time of replacement, costs to re-install are approximately half of the initial cost, as the foundation, base, and drainage system can be re-used.



7. PROGRAM ANALYSIS: Identified Development Scenarios

Understanding that the goals of the proposed multi-use sports complex are to meet the needs of local citizens, drive new revenues, and generate economic impact through new visitation and associated spending, and that CARD currently has 14-acres of undeveloped land available at DeGarmo Park, a market supportable building recommendation was developed as outlined below in Scenario 1A. Scenario 1B addresses additional program elements, for which an approximately 40-acre site would need to be identified for potential development.

Scenario 1A: DeGarmo Park Build-Out

- Two new synthetic multipurpose rectangle fields and conversion of the two existing natural grass multipurpose soccer fields to synthetic fields.
 - 225' x 360' fields with 10' clearance on all sides
Requires approximately 2.0 acres per field
Approximately 4.5 acres per field needed for fields and support space
- Indoor court complex offering:
 - 4 hardwood courts
(4 basketball/8 volleyball)
 - Concession facilities
 - Estimated 65,000 to 80,000 GSF facility
1.5 to 1.85 acres for indoor facility
Approximately 3.5 to 4.0 total acres needed for facility and support space
- Community pool/aquatic center:
 - 25-yard x 35-yard, 8-lane pool
 - Shallow warm-up pool
 - Zero-depth entry pool with recreational amenities such as water slides, climbing wall, spray toys, play structure(s), etc.
 - Requires approximately 3.5 acres for facilities and support space

Scenario 1B: Other Program Elements (Land Parcel to be Identified)

- Six (6) skinned-infield youth baseball/softball fields in a pinwheel configuration and two (2) full-sized, grass infield baseball fields within two adjacent configurations, or closely grouped together
 - Lighting for all fields
 - Restroom and concession facilities
 - Field operations building
 - Warm-up areas and one batting cage for every two fields
 - Small playground and multiple shade structures
 - Paved parking lot, parking capacity for approximately 75 spaces per field
 - Approximately 6.0 to 6.5 acres per field needed for fields and support space

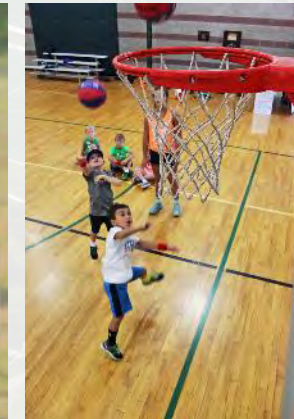
7. PROGRAM ANALYSIS: Identified Development Scenarios

A second scenario was also considered, reflecting a potential full build-out of the market indicated program. As shown below, the full build-out of the market indicated program would require approximately 80 acres of developable land.

Scenario 2: Full Build-Out of Market Indicated Program

- Six (6) synthetic softball/youth baseball fields and two (2) full-sized, synthetic turf baseball fields within two adjacent configurations, or closely grouped together
 - Lighting for at least four (4) softball/youth fields and one (1) full-sized baseball field
 - Restroom and concession facilities
 - Warm-up areas, one batting cage for every two softball/youth fields and one batting cage for each full-sized baseball field
 - Fencing completely surrounding each field; covered dugouts
 - Two sets of bleacher seats at each field, between home plate and dugouts
 - Small playground and multiple shade structures
 - Approximately 6.0 to 6.5 acres per field needed for fields and support space
- Six (6) full-sized synthetic multipurpose rectangle fields
 - Lighting for at least four fields
 - 225' x 360' fields with 10' clearance on all sides
Approximately 4.5 acres per field needed for fields and support space
- Indoor court complex offering:
 - 4 hardwood courts
(4 basketball/8 volleyball)
 - Concession facilities
 - Estimated 80,000 SF facility; approximately 4.0 total acres needed for facility and support space
- Community pool/aquatic center:
 - 25-yard x 35-yard, 8-lane pool
 - Shallow warm-up pool
 - Zero-depth entry pool with recreational amenities such as water slides, climbing wall, spray toys, play structure(s), etc.
 - Requires approximately 4.0 acres for facilities and support space

8. COST/BENEFIT ANALYSIS



8. COST/BENEFIT ANALYSIS: Overview & Methods

This section presents an analysis of estimated utilization and costs/benefits associated with potential new sports and recreation facilities in Chico. Initially, based on the results of the market demand and building program analyses, modeling and analysis was performed to generate performance estimates for potential sports and recreation facilities in Chico. Performance estimates for potential sports and recreation have been presented over a 10-year projection period. A stabilized year of operation is assumed to occur by the fifth full year of sports and recreation facility operation. All dollar figures are represented in terms of 2018 dollars.

COSTS (Construction & Operations)

An analysis was performed to generate estimated order-of-magnitude construction costs, as well as the estimated financial operating characteristics of potential new sports and recreation facilities in Chico. The cost estimates were generated using industry per-unit data adjusted for conditions in northern California and cost data of comparable new sports and recreation facilities, modified for time and locations. Construction costs tend to vary widely among comparable sports and recreation facility projects. Many variables exist that influence actual realized construction costs, including type of facility, size, components, level of finish, integrated amenities, costs of goods and services in the local market, location and topography of the site, ingress/egress issues and other such aspects. Importantly, a detailed architectural concept, design and costing study would be required to specifically estimate construction costs for potential new sports and recreation facilities in Chico. The estimates assume the previously identified development scenarios.

Additionally, a financial operating analysis was prepared for the potential new sports and recreation facilities in Chico. Specifically, we developed a computer-based model incorporating comparable facility data and the estimated levels of event utilization and attendance derived from the market analysis to generate estimates with regard to potential annual sports and recreation facility operating revenues and expenses.

Revenues including rental, concessions, registration fees, tournament income, advertising and sponsorship revenues, and other such sources were estimated. Expenses including salaries (permanent and event driven staff costs), utilities, maintenance, supplies, insurance and others will be estimated. Further, we have outlined other potential non-operating revenue/expense assumptions in order to provide initial estimations of the associated financial return/risk structures. The comparison of revenues and expenses enables stakeholders to evaluate the level of facility-supportable revenues or public subsidies that may be required for annual facility operations.

This presentation is designed to assist project representatives in assessing the financial effects of potential new sports and recreation facilities and cannot be considered a presentation of expected future results. Accordingly, the analysis of potential financial operating results may not be useful for other purposes. The assumptions disclosed herein are not all inclusive, but are those deemed to be significant. Because events and circumstances frequently do not occur as expected, there usually will be differences between estimated and actual results and these differences may be material.

8. COST/BENEFIT ANALYSIS: Estimated Development Costs

As shown, the assumed capital development costs for a build-out of the DeGarmo Park masterplan scenario approximates \$32.7 million. Adding the triangle field components at a yet-to-be-determined location would add approximately \$8.2 million, for a total Scenario 1 project cost of just over \$40.9 million. Scenario 2, a slightly larger program with fully synthetic triangle fields designed to host more non-local tournament activity, would be expected to come with a slightly higher construction cost of \$49.4 million.

An assumption was used for site/infrastructure costs and will need to be adjusted upon further planning and investigation. Additionally, these estimates are based on order-of-magnitude construction costs of similar regional and national venues. Detailed architectural concept, design and costing analysis would be required to specifically estimate construction costs. It is important to note that private sector contributions can help to defray these costs. Opportunities to engage the private sector will be discussed later.

Scenario 1A: DeGarmo Park Build-Out	
Multisport Synthetic Turf Fields	
Number	4
Cost per Field	\$650,000
Soft Cost Rate	30%
Total	\$3,380,000
Indoor Hardwood Court Complex	
Gross Square Feet	65,000
Cost per GSF	\$165
Soft Cost Rate	30%
Total	\$13,942,500
Aquatic Center	
Hard Costs	\$10,460,000
FF&E and Soft Costs	\$3,900,000
Total	\$14,360,000
Total Project Costs	
Hard Costs	\$23,785,000
Soft Costs	\$7,897,500
Total Construction	\$31,682,500
Site/Infrastructure Costs (est.)	\$1,000,000
Total Est. Capital Costs	\$32,682,500

Scenario 1B: Other Program Elements	
Baseball/Softball Skinned Infield Fields	
Number	6
Cost per Field	\$350,000
Soft Cost Rate	30%
Total	\$2,730,000
Full-Sized Grass Infield Baseball Fields	
Number	2
Cost per Field	\$380,000
Soft Cost Rate	30%
Total	\$988,000
Total Project Costs	
Hard Costs	\$2,860,000
Soft Costs	\$858,000
Total Construction	\$3,718,000
Site/Infrastructure Costs (est.)	\$4,500,000
Total Est. Capital Costs	\$8,218,000
Total Est. Scenario 1 Costs	\$40,900,500

Scenario 2: Full Build-Out of Market Indicated Program			
Baseball/Softball Synthetic Turf Fields		Indoor Hardwood Court Complex	
Number	6	Gross Square Feet	80,000
Cost per Field	\$575,000	Cost per GSF	\$165
Soft Cost Rate	30%	Soft Cost Rate	30%
Total	\$4,485,000	Total	\$17,160,000
Full-Sized Synthetic Baseball Fields		Aquatic Center	
Number	2	Hard Costs	\$10,751,000
Cost per Field	\$600,000	FF&E and Soft Costs	\$4,008,000
Soft Cost Rate	30%	Total	\$14,759,000
Total	\$1,560,000		
Multisport Synthetic Turf Fields		Total Project Costs	
Number	6	Hard Costs	\$32,801,000
Cost per Field	\$700,000	Soft Costs	\$10,623,000
Soft Cost Rate	30%	Total Construction	\$43,424,000
Total	\$5,460,000		
		Site/Infrastructure Costs (est.)	\$6,000,000
		Total Est. Capital Costs	\$49,424,000

Note: Aquatic Center costs based on 2016 Aquatic Center Feasibility Study prepared by Aquatic Design Group and The Sports Management Group.

8. COST/BENEFIT ANALYSIS: Estimated Utilization

A detailed utilization model was developed to consider a large number of variables and inputs to analyze each sport/use for the two development scenarios analyzed. Separate assumptions were used for the development of usage and attendance among local leagues and clubs versus non-local tournaments and meets versus clinics, camps and lessons, versus open recreation. The exhibits below and on the following page present summaries of total estimated annual attendance, number of tournaments, non-local attendance and hotel room generation for each of the development scenarios analyzed, for a stabilized year of operations (assumed to be year five).

Scenario 1A

Rectangle Fields

Total Attendance

Leagues	61,606
Practices	66,251
Camps	2,325
In-House Tournaments	10,138
Third Party Tournaments	<u>11,405</u>
Total Attendance	151,725

Tournaments

In-House Tournaments	6
Third-Party Tournaments	<u>8</u>
Total Tournaments	14

Non-Local Attendance

Leagues	3,080
Practices	3,313
Camps	698
In-House Tournaments	6,083
Third Party Tournaments	<u>8,554</u>
Total Non-Local Attendance	21,727

Hotel Room Nights

Leagues	0
Practices	0
Camps	42
In-House Tournaments	608
Third Party Tournaments	<u>1,198</u>
Total Hotel Room Nights	1,848

Indoor Courts

Total Attendance

Leagues	75,237
Practices	88,343
Camps	6,788
In-House Tournaments	27,324
Third Party Tournaments	<u>19,008</u>
Total Attendance	216,699

Tournaments

In-House Tournaments	14
Third-Party Tournaments	<u>10</u>
Total Tournaments	24

Non-Local Attendance

Leagues	3,762
Practices	4,417
Camps	2,036
In-House Tournaments	16,394
Third Party Tournaments	<u>14,256</u>
Total Non-Local Attendance	40,866

Hotel Room Nights

Leagues	0
Practices	0
Camps	122
In-House Tournaments	1,639
Third Party Tournaments	<u>1,996</u>
Total Hotel Room Nights	3,757

Aquatic Facility

Total Attendance

Leagues	NA
Practices	NA
Camps	NA
In-House Tournaments	3,960
Third Party Tournaments	<u>0</u>
Total Attendance	3,960

Tournaments

In-House Tournaments	10
Third-Party Tournaments	<u>0</u>
Total Tournaments	10

Non-Local Attendance

Leagues	NA
Practices	NA
Camps	NA
In-House Tournaments	2,376
Third Party Tournaments	<u>0</u>
Total Non-Local Attendance	2,376

Hotel Room Nights

Leagues	NA
Practices	NA
Camps	NA
In-House Tournaments	238
Third Party Tournaments	<u>0</u>
Total Hotel Room Nights	238

Scenario 1B

Triangle Fields

Total Attendance

Leagues	105,676
Practices	147,755
Camps	2,760
In-House Tournaments	34,109
Third Party Tournaments	<u>27,720</u>
Total Attendance	318,020

Tournaments

In-House Tournaments	31
Third-Party Tournaments	<u>26</u>
Total Tournaments	57

Non-Local Attendance

Leagues	5,284
Practices	7,388
Camps	828
In-House Tournaments	20,465
Third Party Tournaments	<u>20,790</u>
Total Non-Local Attendance	54,755

Hotel Room Nights

Leagues	0
Practices	0
Camps	50
In-House Tournaments	2,047
Third Party Tournaments	<u>2,911</u>
Total Hotel Room Nights	5,007

8. COST/BENEFIT ANALYSIS: Estimated Utilization

Scenario 2

Rectangle Fields

Total Attendance

Leagues	67,022
Practices	71,368
Camps	2,325
In-House Tournaments	12,672
Third Party Tournaments	<u>22,810</u>
Total Attendance	176,196

Tournaments

In-House Tournaments	8
Third-Party Tournaments	<u>16</u>
Total Tournaments	24

Non-Local Attendance

Leagues	3,351
Practices	3,568
Camps	698
In-House Tournaments	7,603
Third Party Tournaments	<u>17,107</u>
Total Non-Local Attendance	32,327

Hotel Room Nights

Leagues	0
Practices	0
Camps	56
In-House Tournaments	1,217
Third Party Tournaments	<u>3,079</u>
Total Hotel Room Nights	4,352

Indoor Courts

Total Attendance

Leagues	80,242
Practices	94,421
Camps	6,788
In-House Tournaments	28,512
Third Party Tournaments	<u>23,166</u>
Total Attendance	233,128

Tournaments

In-House Tournaments	15
Third-Party Tournaments	<u>12</u>
Total Tournaments	27

Non-Local Attendance

Leagues	4,012
Practices	4,721
Camps	2,036
In-House Tournaments	17,107
Third Party Tournaments	<u>17,375</u>
Total Non-Local Attendance	45,251

Hotel Room Nights

Leagues	0
Practices	0
Camps	163
In-House Tournaments	2,737
Third Party Tournaments	<u>3,127</u>
Total Hotel Room Nights	6,027

Aquatic Facility

Total Attendance

Leagues	NA
Practices	NA
Camps	NA
In-House Tournaments	3,960
Third Party Tournaments	<u>0</u>
Total Attendance	3,960

Tournaments

In-House Tournaments	10
Third-Party Tournaments	<u>0</u>
Total Tournaments	10

Non-Local Attendance

Leagues	NA
Practices	NA
Camps	NA
In-House Tournaments	2,376
Third Party Tournaments	<u>0</u>
Total Non-Local Attendance	2,376

Hotel Room Nights

Leagues	NA
Practices	NA
Camps	NA
In-House Tournaments	380
Third Party Tournaments	<u>0</u>
Total Hotel Room Nights	380

Triangle Fields

Total Attendance

Leagues	116,616
Practices	165,918
Camps	2,760
In-House Tournaments	39,494
Third Party Tournaments	<u>35,798</u>
Total Attendance	360,587

Tournaments

In-House Tournaments	36
Third-Party Tournaments	<u>33</u>
Total Tournaments	69

Non-Local Attendance

Leagues	5,831
Practices	8,296
Camps	828
In-House Tournaments	23,697
Third Party Tournaments	<u>26,849</u>
Total Non-Local Attendance	65,500

Hotel Room Nights

Leagues	0
Practices	0
Camps	66
In-House Tournaments	3,791
Third Party Tournaments	<u>4,833</u>
Total Hotel Room Nights	8,690

8. COST/BENEFIT ANALYSIS: Financial Operations Assumptions

An analysis of the estimated financial operations of potential new sports and recreation facilities in Chico was conducted. This financial operating analysis only considers revenues and expenses generated through the operation of the identified facilities and does not consider other potential ancillary income that may be related to the project (such as incremental tax revenue, parking income, admissions surcharges, interest income, etc.), nor does it consider other non-operating costs, such as construction costs (i.e., debt service) and capital repair/replacement funding. Key assumptions used to estimate the potential financial operations of potential new amateur and recreational sports facilities in Chico include, but are not limited to the following:

1. A built-out DeGarmo Park (Scenario 1A), a potential new triangle field complex (Scenario 1B) and a potential new complex to address all of the market indicated event facilities (Scenario 2) will consist of the respective programs previously outlined herein.
2. Baseball, softball, soccer, basketball, volleyball and other such leagues/tournaments will be operated by both in-house and through third-party organizers who will pay rental fees to the Complexes.
3. The Complexes will be owned by CARD or some other public or non-profit entity and therefore will be exempt from property taxes.
4. The identified Complexes will be operated and managed by CARD or its identified professional, competent and experienced private management company under contract.
5. The Complexes will be aggressively marketed and provide competitive rates.
6. CARD or the chosen management company (or companies) will promote events and uses in keeping with CARD's goals of community involvement, quality of life for residents, and economic impact.
7. The baseball/softball diamonds, soccer fields and indoor court facilities will be built to tournament-quality standards and will be well-maintained.
8. Ample parking will be provided to accommodate demand.
9. There are no significant or material changes in the supply or quantity of existing venues in the marketplace.
10. Stabilization of operations is assumed to occur by year 5 for each complex under both development scenarios.
11. Figures are presented in terms of 2018 dollars.
12. Unless specifically indicated in the exhibit, figures do not include debt service, depreciation or other non-operating costs (with the exception of an assumed annual capital reserve expense).



8. COST/BENEFIT ANALYSIS: Estimated Financial Operations

The exhibit below presents a summary of projected financial operations, in 2018 dollars, associated with development Scenarios 1A and 1B, respectively. The subsequent page presents a summary of the projected combined financial operations of Scenarios 1A and 1B, in 2018 dollars, against the projected financial operations of Scenario 2.

	Chico Sports Complex - Scenario 1A					Chico Sports Complex - Scenario 1B				
	Year 1 2019	Year 2 2020	Year 3 2021	Year 4 2022	Year 5 2023	Year 1 2019	Year 2 2020	Year 3 2021	Year 4 2022	Year 5 2023
Operating Revenues										
League, Practice and Camp Rentals	\$1,244,563	\$1,327,367	\$1,435,269	\$1,525,636	\$1,597,340	\$424,730	\$470,479	\$498,377	\$522,421	\$547,667
Tournament Rental Income	\$146,500	\$149,500	\$163,500	\$176,500	\$186,500	\$32,000	\$47,000	\$54,000	\$76,000	\$91,000
In-House Tournament Registration Fees	\$264,000	\$374,700	\$427,300	\$489,000	\$582,400	\$81,160	\$126,800	\$228,280	\$273,920	\$296,760
Concessions (Net)	\$47,714	\$57,566	\$67,762	\$77,499	\$84,293	\$55,385	\$66,957	\$78,965	\$90,742	\$101,982
Other Revenue	\$25,000	\$25,000	\$25,000	\$25,000	\$25,000	\$25,000	\$25,000	\$25,000	\$25,000	\$25,000
Total Operating Revenues	\$1,727,777	\$1,934,133	\$2,118,831	\$2,293,635	\$2,475,533	\$618,275	\$736,235	\$884,622	\$988,083	\$1,062,410
Operating Expenses										
Salaries & Wages	\$1,104,250	\$1,160,500	\$1,160,500	\$1,216,750	\$1,284,250	\$322,500	\$375,000	\$375,000	\$427,500	\$427,500
Tournament Expenses	\$70,000	\$114,280	\$135,320	\$160,000	\$197,360	\$32,464	\$50,720	\$91,312	\$109,568	\$118,704
Utilities	\$457,500	\$464,938	\$472,561	\$480,375	\$488,384	\$140,000	\$143,500	\$147,088	\$147,088	\$147,088
Repairs & Maintenance	\$198,000	\$201,938	\$205,973	\$210,110	\$214,351	\$368,000	\$377,200	\$386,630	\$386,630	\$386,630
Materials and Supplies	\$167,000	\$169,888	\$172,847	\$175,881	\$178,990	\$52,000	\$53,300	\$54,633	\$54,633	\$54,633
Insurance	\$90,500	\$91,900	\$93,335	\$94,806	\$96,314	\$32,000	\$50,000	\$50,000	\$50,000	\$50,000
General & Administrative	\$110,000	\$112,125	\$114,303	\$116,536	\$118,824	\$60,000	\$80,000	\$80,000	\$80,000	\$80,000
Other Miscellaneous	\$69,500	\$70,125	\$70,766	\$71,422	\$72,095	\$40,000	\$40,000	\$40,000	\$40,000	\$40,000
Total Operating Expenses	\$2,266,750	\$2,385,693	\$2,425,605	\$2,525,880	\$2,650,568	\$1,046,964	\$1,169,720	\$1,224,662	\$1,295,418	\$1,304,554
Operating Income/(Loss)	(\$538,973)	(\$451,559)	(\$306,774)	(\$232,245)	(\$175,035)	(\$428,689)	(\$433,485)	(\$340,040)	(\$307,335)	(\$242,144)

8. COST/BENEFIT ANALYSIS: Estimated Financial Operations

	Chico Sports Complex - Scenario 1					Chico Sports Complex - Scenario 2				
	Year 1 2019	Year 2 2020	Year 3 2021	Year 4 2022	Year 5 2023	Year 1 2019	Year 2 2020	Year 3 2021	Year 4 2022	Year 5 2023
Operating Revenues										
League, Practice and Camp Rentals	\$1,669,293	\$1,797,846	\$1,933,647	\$2,048,057	\$2,145,007	\$1,770,411	\$1,923,795	\$2,067,490	\$2,191,128	\$2,293,485
Tournament Rental Income	\$178,500	\$196,500	\$217,500	\$252,500	\$277,500	\$193,500	\$225,500	\$270,500	\$296,500	\$335,500
In-House Tournament Registration Fees	\$345,160	\$501,500	\$655,580	\$762,920	\$879,160	\$419,200	\$621,180	\$776,460	\$869,960	\$949,040
Concessions (Net)	\$103,099	\$124,523	\$146,726	\$168,241	\$186,275	\$117,788	\$147,415	\$174,632	\$194,131	\$215,269
Other Revenue	\$50,000	\$50,000	\$50,000	\$50,000	\$50,000	\$50,000	\$50,000	\$50,000	\$50,000	\$50,000
Total Operating Revenues	\$2,346,052	\$2,670,369	\$3,003,453	\$3,281,718	\$3,537,942	\$2,550,899	\$2,967,891	\$3,339,082	\$3,601,719	\$3,843,294
Operating Expenses										
Salaries & Wages	\$1,426,750	\$1,535,500	\$1,535,500	\$1,644,250	\$1,711,750	\$1,386,250	\$1,386,250	\$1,458,250	\$1,514,500	\$1,586,500
Tournament Expenses	\$102,464	\$165,000	\$226,632	\$269,568	\$316,064	\$132,080	\$212,872	\$274,984	\$312,384	\$344,016
Utilities	\$597,500	\$608,438	\$619,648	\$627,462	\$635,472	\$702,500	\$716,063	\$729,964	\$740,011	\$750,308
Repairs & Maintenance	\$566,000	\$579,138	\$592,603	\$596,740	\$600,981	\$425,500	\$435,125	\$444,991	\$450,900	\$456,958
Materials and Supplies	\$219,000	\$223,188	\$227,480	\$230,513	\$233,623	\$299,800	\$306,008	\$312,370	\$316,791	\$321,322
Insurance	\$122,500	\$141,900	\$143,335	\$144,806	\$146,314	\$196,000	\$184,250	\$186,556	\$188,920	\$191,343
General & Administrative	\$170,000	\$192,125	\$194,303	\$196,536	\$198,824	\$162,500	\$184,625	\$186,803	\$189,036	\$191,324
Other Miscellaneous	\$109,500	\$110,125	\$110,766	\$111,422	\$112,095	\$109,500	\$110,125	\$110,766	\$111,422	\$112,095
Total Operating Expenses	\$3,313,714	\$3,555,413	\$3,650,267	\$3,821,298	\$3,955,122	\$3,414,130	\$3,535,317	\$3,704,684	\$3,823,964	\$3,953,867
Operating Income/(Loss)	(\$967,662)	(\$885,044)	(\$646,814)	(\$539,580)	(\$417,180)	(\$863,231)	(\$567,426)	(\$365,602)	(\$222,245)	(\$110,573)

8. COST/BENEFIT ANALYSIS: Cost Estimates

The exhibit below presents the total estimated costs in 2018 dollars that will likely be borne by CARD to implement each of the scenarios, for a stabilized year of operations (assumed to be the fifth full year of operations), as well as cumulated costs over the first 10 years of operations. Costs have been presented in terms of construction debt service (assuming the entire construction debt would be bonded debt) and operating subsidy needed per scenario. Specifically, a 30-year term and a 4.5 percent annual interest rate have been assumed for the hypothetical debt associated with each scenario. However, should there be an opportunity to utilize funding sources and financing mechanisms (in part or in full) that would limit CARD's need to issue traditional bonded debt (in part or in full), the cost of capital could be reduced and overall annual costs would lower. A replacement reserve has been assumed to account for replacement of the synthetic turf (every approximately 12 years) and other major capital improvements that would be expected.

ESTIMATED COSTS	Scenario 1A: DeGarmo Build-Out		Scenario 1B: New Triangle Field Complex		Scenario 1: Combined		Scenario 2: Full Program Build-Out	
	Stabilized Year	10-year Total	Stabilized Year	10-year Total	Stabilized Year	10-year Total	Stabilized Year	10-year Total
One-time Costs:								
Hard Construction Costs	--	\$23,785,000	--	\$2,860,000	--	\$26,645,000	--	\$32,801,000
Soft Construction Costs	--	7,897,500	--	858,000	--	8,755,500	--	10,623,000
Site / Infrastructure Costs	--	1,000,000	--	4,500,000	--	5,500,000	--	6,000,000
Total Public Sector Cost	--	\$32,682,500	--	\$8,218,000	--	\$40,900,500	--	\$49,424,000
Ongoing Operations:								
Operating Revenues	\$2,475,533	\$24,755,328	\$1,062,410	\$10,624,096	\$3,537,942	\$35,379,424	\$3,843,294	\$38,432,939
Operating Expenses	2,650,568	26,505,682	1,304,554	13,045,540	3,955,122	39,551,222	3,953,867	39,538,666
Operating Profit/(Loss)	(\$175,035)	(\$1,750,354)	(\$242,144)	(\$2,421,444)	(\$417,180)	(\$4,171,798)	(\$110,573)	(\$1,105,727)
Ongoing Costs:								
Debt Service	\$2,006,000	\$20,060,000	\$505,000	\$5,050,000	\$2,511,000	\$25,110,000	\$3,034,000	\$30,340,000
Operations	175,035	1,750,354	242,144	2,421,444	417,180	4,171,798	110,573	1,105,727
Capital Reserve Funding	301,125	3,011,250	0	0	301,125	3,011,250	704,125	7,041,250
Total Annual Costs	\$2,482,160	\$24,821,604	\$747,144	\$7,471,444	\$3,229,305	\$32,293,048	\$3,848,698	\$38,486,977

8. COST/BENEFIT ANALYSIS: Overview & Methods

Many of the most important benefits related to the operations of proposed new sports and recreation facilities in Chico cannot be quantitatively measured. Firstly, the estimated quantitative impacts of the proposed facilities do not include benefits that may be generated from other private sector investment surrounding the facilities such as hotel, restaurant, other retail, and entertainment establishments, spurred by increased visitation to the sub-area. Additionally, other potential qualitative benefits for Chico and Chico-area residents could include:

1. Enhanced sports and recreation opportunities for local youths and adults;
2. Reduction in the need for residents to leave Chico for sports and recreation activities;
3. Synergy with the other sports, recreation, entertainment and leisure facilities leading to increased tourism activity;
4. Enhanced community pride, self-image, exposure and reputation; and,
5. Enhanced regional exposure.

Beyond these qualitative benefits, the annual operations of the proposed facilities would be expected to provide important new quantifiable benefits to the community. Specifically, the annually recurring impacts of the proposed amateur and recreational sports facilities begin with the initial direct spending made during operations related to participant fees, camps, clinics, facility rentals, concessions, advertising and other income as well as expenditures made before and after events throughout local hotels, restaurants, retail, entertainment and other establishments. Initial direct spending is generated during construction on materials and labor and during operations at events on registration fees, facility rentals, concessions and advertising, as well as before and after events throughout local hotel, restaurant, retail and other establishments.

Economic impacts associated with the proposed facilities will likely be further increased through re-spending of the net new direct spending. The total impact is estimated by applying an economic multiplier to initial direct spending to account for the total economic impact. The total output multiplier is used to estimate the aggregate total spending that takes place beginning with the direct spending and continuing through each successive round of re-spending. Successive rounds of re-spending are generally discussed in terms of their indirect and induced effects on the area economy. Each is discussed in more detail on the following page.



8. COST/BENEFIT ANALYSIS: Economic Impact Concepts

- **Direct Spending** consists principally of initial purchases made by participants and spectators at a sports complex who do not reside in the local area. This spending typically takes place in local hotels, restaurants, retail establishments and other such businesses. An example of direct spending is when out-of-town participants and spectators pay a local hotel for overnight lodging accommodations or purchase meals.
- **Indirect Spending** consists of the re-spending of the initial or direct expenditures. An example of indirect spending is when a restaurant purchases additional food and dining supplies as a result of new dining expenditures through increased patronage. A certain portion of these incremental supply expenditures occurs within the local community (i.e., “indirect spending,” the type of which is quantified under this analysis), while another portion leaves the local economy (i.e., “leakage”).
- **Induced Spending** consists of the positive changes in employment, earnings and tax collections generated by changes in population associated with direct/indirect expenditures.
- **Total Output** represents the total direct, indirect and induced spending effects generated by the project. This calculation measures the total dollar change in output that occurs in the local economy for each dollar of output delivered to final demand.
- **Personal Earnings** (or Personal Income) represents the wages and salaries earned by employees of businesses associated with or impacted by the project. In other words, the multiplier measures the total dollar change in earnings of households employed by the affected industries for each additional dollar of output delivered to final demand.
- **Employment** represents the number of full- and part-time jobs. The employment multiplier measures the total change in the number of jobs in the local economy (throughout a wide diversity of industry sectors) for each additional \$1.0 million of output delivered to final demand.



8. COST/BENEFIT ANALYSIS: Cost/Benefit Comparison

In order to estimate the incremental economic impact benefits generated to the local economy, certain adjustments must be made to initial direct spending to reflect the fact that all spending is not likely to impact the local economy. Adjustments must be made to account for the fact that a certain amount of spending associated with the proposed projects will be made by local residents (e.g., residents of Chico) and, therefore, likely represents money already spent in the economy in another form. This phenomenon is called displacement and reduces the overall net new impacts. This type of spending is not considered net new to the local economy. Additionally, not all spending associated with the proposed projects will take place in the local economy. A portion of this spending is likely to occur outside the immediate area and also outside of Chico (e.g., non-local participants staying in hotel properties outside of Chico). This phenomenon is called leakage and reduces the overall impact.

The exhibit below presents a summary of the estimated annual economic impacts, in 2018 dollars, associated with the construction and operations of the potential development scenarios identified for new amateur and recreational sports facilities in Chico. Estimated impacts relate only relate to net new visitor spending in the Chico market and does not include construction impacts.

	Scenario 1A: DeGarmo Build-Out		Scenario 1B: New Triangle Field Complex		Scenario 1: Combined		Scenario 2: Full Program Build-Out	
	Stabilized Year	10-year Total	Stabilized Year	10-year Total	Stabilized Year	10-year Total	Stabilized Year	10-year Total
ESTIMATED BENEFITS								
Attendance:								
Total Attendee Days	372,384	3,723,836	318,020	3,180,200	690,404	6,904,036	773,870	7,738,704
Total Non-Local Visitor Days	64,968	649,681	54,755	547,548	119,723	1,197,230	145,455	1,454,546
Total Hotel Room Nights	5,843	58,427	27,356	273,560	33,199	331,987	38,115	381,152
Ongoing Quantifiable Benefits:								
Direct Spending	\$1,417,970	\$14,179,700	\$1,229,560	\$12,295,600	\$2,647,530	\$26,475,300	\$4,431,370	\$44,313,700
Indirect/Induced Spending	879,141	8,791,414	762,327	7,623,272	1,641,469	16,414,686	2,747,449	27,474,494
Total Output	\$2,297,111	\$22,971,114	\$1,991,887	\$19,918,872	\$4,288,999	\$42,889,986	\$7,178,819	\$71,788,194
Personal Income (earnings)	\$1,148,556	\$11,485,557	\$995,944	\$9,959,436	\$2,144,499	\$21,444,993	\$3,589,410	\$35,894,097
Employment (full & part-time jobs)	30	296	26	257	55	553	92	925

9. DEVELOPMENT OPTIONS



9. DEVELOPMENT OPTIONS: Management Models

An evaluation of the various options regarding the management and operations of the potential new amateur and recreational sports facilities in Chico was conducted. Different management structure alternatives each have their own unique advantages and disadvantages, which should be considered when making decisions regarding the management of the facilities. Further information on public and private management models is presented below and on the following page.

Public Management

Under a publicly owned and operated venue model, the land and facilities are owned and operated by a public entity (e.g., CARD). Typically, the primary goal is to first and foremost provide access to residents of the municipality. Facilities that operate under this model generally attract the greatest percentage of local participation and attendance. Publicly-operated facilities are typically funded through the municipal government owner's general fund and/or other dedicated public sector contributions. These facilities typically rely on an annual financial operating subsidy.

Advantages:

- Control over facility operations;
- Financial support;
- Synergies with current staff/support functions;
- Bulk purchasing power;
- Existing relationships with local teams; and,
- Knowledge of local user needs/issues.

Disadvantages:

- Lack of private sector financial support;
- Civic service constraints;
- Decisions/purchase/contract approval requirements;
- Potential lack of dedicated staff to aggressively market;
- Lack of incentives/knowledge to maximize revenues;
- Changing political policies; and,
- Limited flexibility.



9. DEVELOPMENT OPTIONS: Management Models

Private Management

Intense and increasing levels of competition among sports complexes have led some public entities to contract day-to-day operations of large-scale sports complexes to private management companies such as Ripken Baseball, Big League Dreams, GoodSports Enterprises, Fieldhouse USA and Sports Facility Management. In the two potential management scenarios outlined below, private management companies are typically responsible for various key operational and fiscal factors such as policies, directives, organizational structure, leadership, job classifications, competition, scheduling and booking, and finance and accounting. The possibility exists for private firms to contribute funds to aid in facility development through rental agreements, revenue share provisions, etc.; however, the current appetite for private funding is low.

Full Management in Partnership with Governmental Entity:

The facility Owner (e.g., CARD) retains all of the rights and privileges of ownership while the private management firm performs assigned management functions. The Owner sets policies while the management company establishes procedures in order to implement the policies and is compensated with a flat annual fee, plus incentive payments designed to reward the production of desired results (e.g., revenue, attendance, event, room night generation, patron satisfaction). The owner is responsible for providing funds necessary to operate the facility within mutually agreed-upon budget parameters.

Full Management in Lieu of Government Entity Involvement:

Alternatively, the Owner may give a private management company land in exchange for building and operating the facility. The Owner only incurs the cost of the land purchase in exchange for the private management company funding the facility's construction and management costs. Typically, this structure minimizes ownership operating risk while maintaining the economic impact generated by the facility in the community.

Advantages:

- Efficiency incentives;
- Existing network of relationships to leverage tournament/event bookings;
- Internal network of knowledge and experience;
- Greater staffing resources;
- More efficient procurement process; and,
- Design, development, and pre-opening consulting services.

Disadvantages:

- Limited current appetite for private investment;
- Potential loss of direct control of the complex;
- Lack of existing local and regional market knowledge;
- Profit motive versus economic impact motives;
- Facility management fees; and,
- Corporate resources spread among several facilities.

9. DEVELOPMENT OPTIONS: Typical Funding Sources

The purpose of this section is to summarize various public and private sector funding opportunities that could represent potential sources of funding to develop new sports and recreation facilities in Chico and meet any on-going operating requirements and capital reserves. The funding analysis presented herein is not intended to be an exhaustive review of all potential funding sources, but rather a review of the most likely funding sources that may be available specific to this project.

Sources Typically Used Industry-wide

While there are a variety of **Public Sector** funding vehicles and revenue sources that have been used in the financing of sports and recreation facility projects in communities throughout the country, a large percentage are owned by the public sector and had construction funding provided through municipal capital project funding (i.e., transfers from a City or County's General Fund or Capital Projects Fund, etc.) or through the issuance of General Obligation Revenue bonds.

Types of financing/funding vehicles that are commonly used in sports and recreation projects throughout the country include:

- General Obligation Revenue Bonds
- Tax Increment Financing (TIF)
- Pay-As-You-Go Financing
- Certificates of Participation
- State/Federal Assistance
- Private/Public Equity & Grants

Under situations where bonds have been issued, debt service is often supported by local tax revenue, which has tended to include the following:

- Property taxes
- Sales & use taxes
- Hotel/motel taxes
- Food & beverage taxes
- Auto rental/taxicab taxes/fees
- Admissions/entertainment taxes

In recent years, a growing number of communities have explored ways in which the **Private Sector** can participate in reducing the overall funding burden borne by the public sector. This participation has taken the form of:

- Grants/Donations
- Naming rights/sponsorships
- Vendor rights
- Facility use agreements
- Registration fee surcharge
- Parking fees

9. DEVELOPMENT OPTIONS: Overview and Typical Sources

Sources Available to CARD

A summary is provided below and on the following pages associated with available public sector revenues for a potential sports and recreation complex in Chico. This information focuses on available sources and the revenues or projected revenues associated with such sources; it does not address the funding capacity available under such sources, and includes the following topics/issues:

POTENTIAL SOURCES OF CONSTRUCTION FUNDING:

- **CARD property tax assessment** – flat rate assessment per household within CARD boundaries.
- **Park Impact Fees** – one-time, flat rate assessment for newly developed households within CARD boundaries.

POTENTIAL SOURCES OF FUNDING FOR FACILITY OPERATIONS:

- **Facility use agreements** – Negotiate up-front funding or advance rental payments in exchange for guaranteed use by organization with regular or ongoing usage of the facility during certain times of the year.
- **Registration fee surcharge** – fee could be applied to participants in CARD activities exclusively at a newly developed facility/complex, at any facility utilized by CARD or to local and/or non-local tournament participants.
- **Parking fees** – parking fee for individuals who take advantage of on-site parking during league and tournament events.
- **Naming or vendor rights opportunities** – sale of pouring, naming or other sponsorship opportunities are likely to be limited in Chico, and would likely be better allocated to support facility operating subsidies.



9. DEVELOPMENT OPTIONS: Recommended Next Steps

Intent of Analysis – An analysis was conducted to evaluate potential funding sources for potential new sports and recreation facilities in Chico. A variety of funding sources were considered. It should be noted that the list of sources is by no means intended to be exhaustive or cumulative in nature. Rather, the funding analysis developed herein was intended to identify the most typical or likely sources of project funding based on a review of comparable facilities and the resources that may be specifically available in the local market. The ultimate financing structure of a facility is dependent on political, economic and other issues of various parties that may be involved in developing a potential new sports and recreation complex. In some markets, the public sector has the ability to finance a substantial portion of the project cost, while in other markets it does not. The same is true of the private sector.

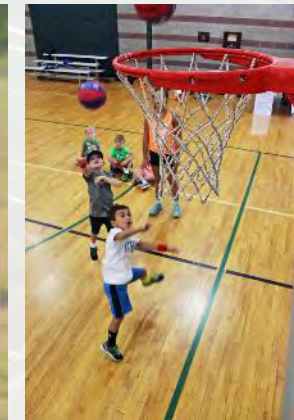
CARD as Primary Source of Funding – The flat rate, per parcel assessment levied by CARD to support ongoing operations and capital repair and replacement at existing facilities could be increased with voter approval. The annual flat tax would be determined based on the required funding to satisfy any debt service for new facilities. Once the facilities have been determined, the annual flat tax revenue would be used to secure funding.

Other Public Sources Not Likely – Conversations with City of Chico and Butte County representatives have indicated that funding support through pledged property tax or sales tax assessments are not likely, as funds are needed for the provision of other civic services. Opportunities should be explored into other partnership opportunities including assistance with the permitting and/or zoning processes.

Partner with Charitable Organization – This analysis quantified the most typical or likely project sources; however, there are other potential sources of funds CARD and the Chico community could explore to help fund the project. One option includes pursuing a partnership with a charitable organization or other philanthropist(s). Corporate or other benefactors should be pursued to solicit funds for project development or to create an endowment fund to support ongoing operations. Additionally, local sports organizations should be engaged to gauge their ability to contribute guaranteed lease payments or to provide volunteer labor hours to reduce the operational burden on CARD in return for priority access to facilities.

Issue an RFQ – Consideration should be given to issuing an RFQ to gain insight from potential local and national private sector partners. The intent would be to initiate conversations with organizations with a potential interest in utilizing new sports and recreation facilities in Chico or those that could derive some benefit through funding, operating or owning such facilities. Distribution could target various sports organization, private operators, potential naming rights or sponsoring entities, and other such organizations. Based on these conversations, CARD and the Chico community can begin to identify potential funding and operating models that would create the greatest opportunities for successful project implementation and operation.

APPENDIX – COMPARABLE FACILITY CASE STUDIES



5. COMPARABLE FACILITIES: Terpenning Rec Complex



FACILITY: Howard M. Terpenning Recreation Complex
City, State: Beaverton, Oregon
Owner: Tualatin Hills Parks and Recreation Department
Operator: Tualatin Hills Parks and Recreation Department
Cost: n/a
Key Facility Components: Tennis Center with 4 indoor courts
 10-lane, 50-meter pool with platform diving towers:

- (2) 1-meter springboards
- (2) 3-meter springboards

3 grass and 2 synthetic turf soccer fields
 6 basketball/12 volleyball courts
 7 lighted softball/baseball fields
 6 lighted outdoor tennis courts
 Skate park, roller hockey rink

Development: The 92 acres hosting the Complex was acquired by the Tualatin Hills Park and Recreation District in the 1970's and opened in 1978.

Tenants: Aquatics:

- Tualatin Hills Swim Club
- Tualatin Hills Dive Club
- Tualatin Hills Synchronized Swimming
- Tualatin Hills Barracudas
- Tualatin Hills Water Polo Club

Rental Rates: Aquatics: up to 25 guests: \$129/hour
 26-50 guests: \$149/hour
 51-75 guests: \$169/hour
 76 or more guests: \$189/hour

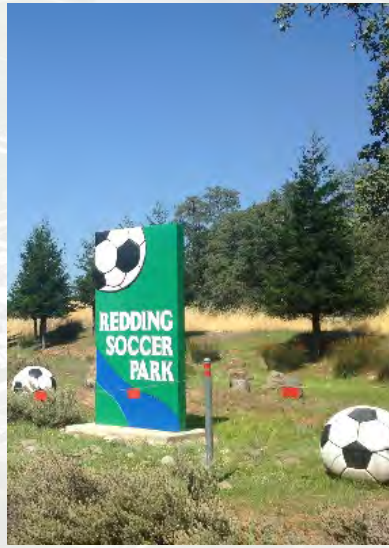
Annual Events: In a recent year of operations:

Revenues: \$470,000
 Expenses: \$1.25 million
 Operating Deficit: \$783,000



Source: Facility Management, 2018.

8. DEVELOPMENT OPTIONS: Redding Sports Complex



FACILITY: City of Redding Sports Complex
City, State: Redding, California
Owner: City of Redding
Operator: Private (baseball/softball fields and fieldhouse) / Non-Profit (soccer fields)
Cost: \$15.8 million for Ballpark / \$10.0 million for Soccer Park
Key Facility Components: Big League Dreams Ballpark
 5 youth baseball fields
 1 20,000-square foot covered soccer field

Redding Soccer Park
 4 full-sized soccer fields

Development: The 30-acre Ballpark was developed in 2004 at a cost of \$15.8 million. \$4.6 million was provided by local taxpayers through Redevelopment Agency funds and bonds, while \$11.2 million came from project-specific state grants.

The Soccer Park was developed in 2007 after the local soccer community recognized a significant shortage in soccer field space. City issued approximately \$10.0 million in general obligation bonds to fund city. Park management is now seeking \$6.0 million in private funds to redevelop and add turf to its four fields, which will likely not be supported by the facilities. No funds come from city to fund either facility.

Tenants: The Ballpark hosts its own organized league play, while Redding Soccer Park is a membership organization that includes a number of local youth soccer leagues, none of which are official tenants of the complex.

Rental Rates: Ballpark Rental: \$240 per team for softball, \$95 per player for baseball.

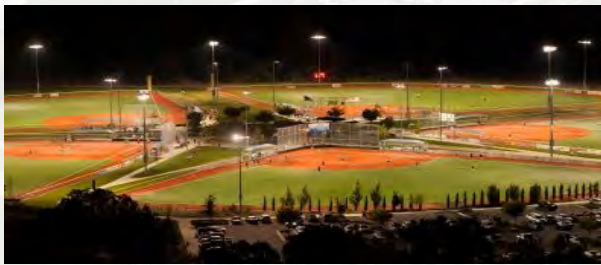
Soccer Field Rental: private case by case deals for many associations and non-profits, otherwise it is typically \$60 to \$70 per hour.

Annual Events: The Ballpark booked 32 weekend tournaments in a recent year of operations.

The Soccer Park utilized for tournaments approximately 12 to 14 tournaments per year. These typically range from 35- to 75-team tournaments.

Source: Facility Management, 2018.

5. COMPARABLE FACILITIES: U.S. Cellular Community Park



- FACILITY:** U.S. Cellular Community Park
- City, State:** Medford, Oregon
- Owner:** City of Medford
- Operator:** Medford Parks and Recreation Department
- Cost:** \$32.5 million
- Key Facility Components:** 3 full-sized baseball fields
7 baseball/softball fields
6 multipurpose fields, including a 1,300-seat stadium field
All fields are lighted with FieldTurf synthetic grass
- Development:** 132-acre park. Phase II opened in 2008 with 5 softball/baseball fields. Phase III opened in 2009 with 6 multi-purpose fields. Phase IV opened in 2015 with 3 additional ballfields

Funding has come through a combination of issuing bonds, and transient lodging tax, car rental tax, and park utility fee proceeds. U.S. Cellular paid \$650,000 for 6 years of naming rights in 2005.

USCCP is the largest municipal installation of FieldTurf in the United States with nearly 1.5 million square feet of synthetic grass.

- Tenants:** American Legion Medford Mustangs
Medford Rogues
- Rental Rates:** Softball/Baseball: \$20-\$25/game
Multi-purpose: \$30-\$40/hour
- Annual Events:** Generate an estimated \$10.2 million in economic stimulus from tournaments and other special events with 1,415 teams competing in more than 4,400 games (44 tournaments).
An estimated 194,000 people visit the park in a typical year.

Source: Facility Management, 2018.

8. DEVELOPMENT OPTIONS: Chappapeela Sports Park



FACILITY: Chappapeela Sports Park
City, State: Hammond, Louisiana
Owner: Hammond Area Recreation District No. 1
Operator: Hammond Area Recreation District No. 1
Key Facility Components: 21 soccer fields
 6 baseball fields
 6 softball fields
 2 football fields
 Gymnasium with 2 courts

Development: In 2010, a \$10-million, 15-year, property tax proposal was approved by voters and construction began in February 2011 on 90 acres of land which was purchased by the city for \$2.57 million from Encore Development. The Sports Park opened on January 31, 2013.

Tenants: South Tangipahoa Youth Soccer Association
 Louisiana Volleyball

Financial Operations: Generates approximately \$250,000 to \$300,000 in operational revenue
 Incurring approximately \$1.5 million in operating expenses
 Approximately \$2.7 million in pledged hotel/motel tax collections covers operational deficit

Annual Events: 36 total tournaments/special events hosted at the facility in 2015:
 29 baseball/softball tournaments
 4 soccer tournaments
 1 lacrosse tournament
 1 flag football tournament



5. COMPARABLE FACILITIES: Dwight Merkel Complex



FACILITY: Dwight Merkel Sports Complex

City, State: Spokane, Washington

Owner: City of Spokane Parks and Recreation

Operator: City of Spokane Parks and Recreation

Cost: \$11.0 million

Key Facility Components: 76-acre facility
 6 full size natural grass soccer fields
 2 full size synthetic athletic fields with lights
 6 ball diamonds (5 of which are lit)
 Concessions, rest rooms and meeting space
 BMX track with lights and timing equipment
 Neighborhood park with playground and splash pad
 1-mile long paved perimeter trail that leads down to Riverside State Park's trails

Development: In 2007, voters approved of a \$7.8 million renovation of the complex.

Tenants: Spokane Parks and Recreation Leagues, Spokane Youth Sports Assoc., Spokane Shadow, Spokane Scotties, Spokane Indians Youth Baseball, Spokane Foxes/Pumas and YMCA Recreation Leagues

Rental Rates: Adult Softball: \$30/hour
 Youth Ball Field: \$17/hour
 Adult/Youth Combo: \$25.50/hour
 Adult Soccer Turf: \$55/hour
 Youth Soccer Turf: \$45/hour
 Adult Soccer Grass: \$35/hour
 Youth Soccer Grass: \$25/hour
 Field Lights: \$12/hour

Annual Events: In a recent year the softball fields averaged approximately 1,269 hours per field, grass rectangle fields averaged approximately 636 hours per field and turf fields averaged approximately 1,552 hours per field.

Source: Facility Management, 2018.

5. COMPARABLE FACILITIES: Rio Vista Community Park



FACILITY: Rio Vista Community Park
City, State: Peoria, Arizona
Owner: City of Peoria
Operator: City of Peoria
Cost: \$8.7 million
Key Facility Components: 145 acres
 8 baseball/softball fields
 10 soccer fields
 51,000 square foot gymnasium/recreation center



Development: Built in 2004, the Rio Vista Community Park was constructed at a cost of \$8.7 million.

Tenants: City of Peoria Parks and Recreation

Rental Rates: Fields are rented to outside organizations at a rate of \$20 to \$40 per field with a two hour minimum. Renting the entire softball or baseball complex costs \$105 to \$310 for a four hour rental, while a 14 hour rental costs \$450 to \$1,210. Tournament fees typically range between \$600 to \$625 per team.

Annual Events: In a recent year, the Park hosted 35 youth and adult baseball and softball tournaments along with other events such as the Special Olympics and activities for seniors.

The facility generated revenues of approximately \$130,000 while incurring operating expenses of \$1.0 million during a recent year. The facility is subsidized and covered by the City of Peoria.



Source: Facility Management, 2018.

8. DEVELOPMENT OPTIONS: East Cobb Baseball Complex



FACILITY: East Cobb Baseball Complex

City, State: Marietta, Georgia

Owner: ECB, Inc.

Operator: ECB, Inc.

Cost: \$9.7 million

Key Facility Components:
30 acre complex
4 baseball fields
4 softball fields

Development: The facility was constructed in 2001 at a cost of \$9.7 million.

Tenants: East Cobb Baseball

Rental Rates: The facility houses a baseball academy which is available for instruction, camps and clinics. The academy rates are based on team participation and the cost is \$125/hour for instruction.

Annual Events: ECB, Inc. is a non-profit organization that does not have any full-time paid employees. Instead ECB, Inc. pays sub-contractors for field maintenance while six full-time administrators are paid by a separate benefactor.

The complex hosts an average of 44 tournaments from February to October, catering exclusively to travel teams with players ages 8 to 18.

ECB, Inc. operates at a financial break-even. In a recent year, the complex generated approximately \$1.0 million in operating revenues and \$1.1 million in operating expenses.



Source: Facility Management, 2018.

5. COMPARABLE FACILITIES: Willamalane Center



FACILITY: Willamalane Center for Sports & Recreation

City, State: Springfield, Oregon

Owner: Willamalane Park and Recreation Department

Operator: Willamalane Park and Recreation Department

Cost: \$1.95 million

Key Facility Components:
 97,000 square feet total
 6 basketball courts/11 volleyball courts
 4 indoor tennis courts
 3 roller derby rinks
 4 outdoor baseball/softball fields
 4 lighted outdoor artificial turf soccer fields
 Seating for 1,000 people

Development: In 2010, the Willamalane Park and Recreation District purchased the foreclosed Regional Sports Center for \$1.5 million transforming it into the Willamalane Center for Sports and Recreation after \$450,000 in improvements, repairs, and remodeling.

Annual operating budget of \$12.0 million

Tenants: Oregon Volleyball Club
 TRBO Basketball

Rental Rates: \$25 to \$60 per hour for indoor courts
 \$25 to \$45 per hour for outdoor fields
 (extra \$15 per hour for lights)

Annual Events: Facility's primary components experienced the following hourly utilization in a recent year of operations:

- Multipurpose Courts – 33%
- Wood Courts – 27%
- Outdoor Fields – 14%

Source: Facility Management, 2018.

5. COMPARABLE FACILITIES: Pleasant Prairie RecPlex



FACILITY: Pleasant Prairie RecPlex

City, State: Pleasant Prairie, Wisconsin

Owner: Village of Pleasant Prairie

Operator: Village of Pleasant Prairie

Cost: \$14.0 million

Key Facility Components: The RecPlex is the largest municipal recreation facility in America
Complex spans over 300,000 sq. ft.
Ice Components: Two NHL-sized rinks (200'x85')
Hardcourt Components: 8 regulation size basketball courts or 16 volleyball courts
(additional 6 outdoor sand volleyball courts)

Development: Fieldhouse was part of the original facility that opened in 2000

Tenants: Cutting Edge, a US Figure Skating Club
Patriots Hockey Program
Ankle Breakers, Old Geezers and Sunday Night Hockey League (SNHL) Adult Leagues

Rental Rates: Ice Rentals:
Summer Prime (8a-10p): \$200/hr
Summer Non-Prime (Before 8a and after 10p): \$150/hr
Fall/Winter Monday - Friday
- Prime (4p-10p): \$280/hr - Non-Prime (6a-4p and after 10p): \$150/hr
Fall/Winter Saturday/Sunday
- Prime (8a-10p): \$280/hr - Non-Prime (Before 8a and after 10p): \$150/hr
RexPlex operations are entirely supported by membership fees and rentals, which covers the payments on the \$30 million bond used to finance the building.

Annual Events: RexPlex operating budget of \$10 million is entirely supported by membership fees, rentals, programming, and sponsorships.
1.5 million people visit each year through both programming and events.
In a recent year the RecPlex recorded \$10,321,100 in revenue and \$9,324,700 in expenses; a profit of \$807,500.

Source: Facility Management, 2018.

5. COMPARABLE FACILITIES: St. Peters Rec-Plex



FACILITY: St. Peters Rec-Plex

City, State: St. Peters, Missouri

Owner: City of St. Peters, MO

Operator: City of St. Peters, MO

Cost: \$18.5 million

Key Facility Components: 8-lane, 50-meter competition pool features:

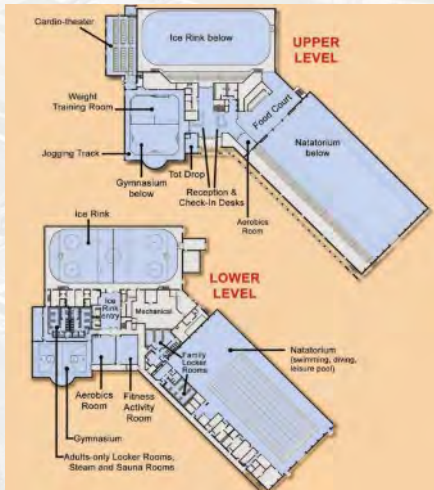
- moveable bulkhead
- spectator seating for 1,400
- (1) 1-meter springboards
- (1) 3-meter springboards
- 1, 3, 5, 7.5, and 10-meter platforms.

Development: Separate recreation pool
 3 basketball/volleyball courts
 5 NHL-sized indoor ice rinks
 Fitness area with cardio and weight room
 Originally opened in 1994; Expanded 112,000 ft. in 2007 at a total project cost of \$18.5 million using bonds issued by the city.

Tenants: RecPlex Sharks

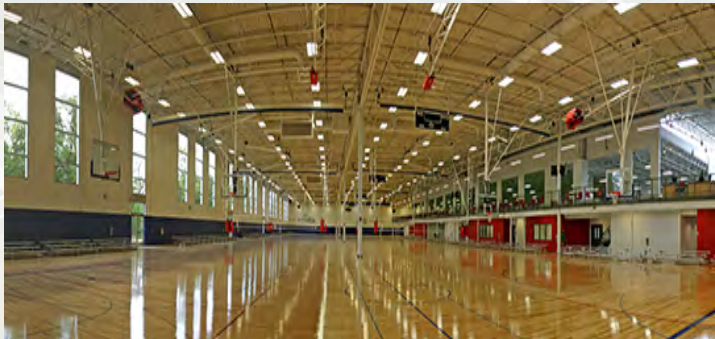
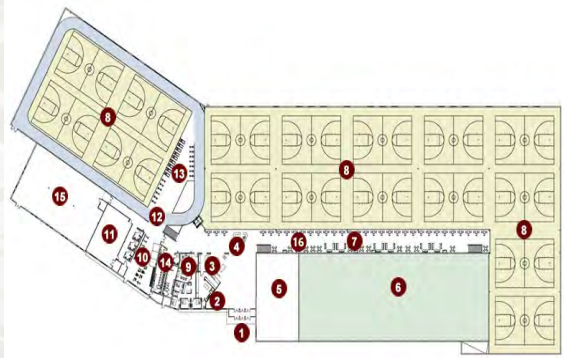
Rental Rates: Entire Natatorium: \$228/hour
 Half of the 50-meter pool: \$144/hour
 Leisure pool: \$144/hour

Annual Events: Aquatics: The RecPlex Sharks hold approximately 6 meets annually at the facility. Annually hosts a triathlon and three large regional swimming meets. Have hosted the Missouri State High School Swimming & Diving Championships, Ozark Swimming Division I Championships, Missouri State High School Water Polo Championships



Source: Facility Management, 2018.

8. DEVELOPMENT OPTIONS: Sports Pavilion Lawrence



FACILITY: Sports Pavilion Lawrence

City, State: Lawrence, Kansas

Owner: City of Lawrence

Operator: City of Lawrence

Cost: \$24.5 million

Key Facility Components: 181,000 sf facility
 8 regulation size basketball courts/16 volleyball courts
 Additional amenities include, indoor turf facility, 1/8 mile indoor track, cardio and aerobic fitness area, gymnastics area, two party rooms and a future 7,000 sf wellness area
 9 full-time and 15-18 part-time/seasonal staff members
 Concession stands are operated by the Clinton Parkway Hy-Vee and regulated by the Parks & Rec nutritional standards
 University of Kansas facilities: 1,500-seat softball stadium, 2,500-seat soccer stadium, 10,000-seat track and field complex, 28,000 square foot indoor training building

Development: Opened in September 2014 at a total cost of \$24.5 million, which consisted of \$22.5 million from the city of Lawrence and \$2.0 million from private donations (plus \$39 million for the University of Kansas facilities)

Tenants: City of Lawrence Parks and Recreation

Rental Rates: Courts: \$50 per hour
 Turf Fields: \$135 per hour

Annual Events: Tournaments are primarily run January through July with little to no utilization in August and September.
 In a recent year, the facility had a total of 37 events:

- 22 Basketball (16 tournaments; 6 camps)
- 13 Volleyball (All Tournaments)
- 1 Futsal (Tournaments)
- 1 Other

Source: Facility Management, 2018.

5. COMPARABLE FACILITIES: Gauche Aquatic Park



FACILITY: Gauche Aquatic Park

City, State: Yuba City, California

Owner: City of Yuba City

Operator: Yuba City Parks and Recreation

Cost: \$14.5 million

Key Facility Components: 25-yard competitive pool with 10 lanes
Two 1-meter and one 3-meter diving boards
Zero entry pool that goes up to 3 feet with a "sprayground"
25-foot water slide
Picnic and barbeque facilities, leisure area, climbing boulders, horseshoe pits, play structure, small stage
10,000 square foot facility with meeting rooms and locker rooms

Development: Opened in 2007

Tenants: United States Masters Swim Team, Feather River Aquatic Club

Rental Rates: General admission is \$5 for single-entry. Children under 2 are free and seniors over 60 pay \$4. A 10-visit pass is available for \$40. Season passes range in price from \$150 to \$300. Birthday parties can be held with access to the pool anytime between 12-2:30pm or 3:30-6pm. Prices range from \$200-\$300 with deposits of either \$50 or \$100 depending on if the indoor or outdoor rooms are booked. Facility rentals for larger groups are available Monday through Friday for \$60 or Saturday or Sunday for \$100 for a minimum of 2 hours. There are additional charges for adding on hours or reaching the 6-hour maximum.

Annual Events: The Gauche Aquatic Park offers a variety of programs and recreational opportunities including Parent & Me classes, adult private swimming lessons for beginners, junior lifeguard training, senior/adult water aerobics, public swim, lap swim, tot time, and twilight swim.



Source: Facility Management, 2018.

5. COMPARABLE FACILITIES: Brentwood Family Aquatic Center



FACILITY: Brentwood Family Aquatic Center

City, State: Brentwood, California

Owner: City of Brentwood

Operator: City of Brentwood Parks and Recreation Department

Cost: N/A

Key Facility Components: Triple-loop and double-loop slides
Zero-entry pool and leisure area
Two 25-yard, 3-lane pools
Competition pool: 25-yard, 10-lanes
1-meter and 3-meter diving boards
Brentwood Skate Park nearby

Development: Opened in May of 2000, the center sits on 4 acres of land. The Brentwood Family Aquatic Center was the first development of a larger complex which has expanded to 22 acres and includes a skate park, Veteran's Park, and a senior center.

Tenants: Brentwood Dolphins Swim Club, Liberty High School Swim/Water Polo Teams

Rental Rates: Daily Entry Passes range from \$3-\$9 depending on time of year, time of day, and weekday versus weekend.
Forever Entry Passes come in 10-entry or 25-entry packs for Recreation Public Swim. Residents pay \$67 and \$161 while non-residents pay \$75 and \$140 for 10-entry and 25-entry passes respectively.
Lap Swim Passes come in a 16 Lap Swim Pass or a 32 Lap Swim Pass. Residents pay \$69 and \$128 while non-residents pay \$75 to \$140 for 16-lap and 32-lap swim passes respectively.

Annual Events: The Brentwood Family Aquatic Center is open from May through the end of October. The center runs American Red Cross accredited adult and children swim lessons throughout its season. The pool is opened up in January and February for the Liberty High School Swim and Water Polo teams to utilize at the beginning of their seasons. Last year's revenues totaled \$388,581.



Source: Facility Management, 2018.

5. COMPARABLE FACILITIES: George F. Haines International Swim Center



- FACILITY:** George F. Haines International Swim Center
- City, State:** Santa Clara, California
- Owner:** City of Santa Clara
- Operator:** City of Santa Clara Parks and Recreation
- Cost:** NA
- Key Facility Components:** 50-meter by 25-yard competitive pool that can be used as a 50-meter, 9-lane racing pool or a 25-yard, 23-lane racing pool
Two 25-yard, 6-lane warm-up pools
One of the 25-yard, 6-lane pools doubles as the 17-foot deep diving well with two 1-meter and two 3-meter boards as well as a platform tower
Locker rooms
- Development:** Construction began in 1966, and the facility was opened in 1968 as a premier Olympic development pool.
- Tenants:** Santa Clara Swimming Club (SCSC), Santa Clara Aquamaids, Santa Clara Diving Club
- Rental Rates:** Senior Swim is free for seniors age 50+ living in the City of Santa Clara.
Noon hour lap swim is open to everyone age 18 and over from 12-1:30pm for \$5.
Recreation swim is 7 days a week in the summer, open to everyone for \$5.
- Annual Events:** The George F. Haines International Swim Center has a storied history, hosting 39 Annual International Invitational Meets, various Senior Nationals, Junior Nationals, Western Zone Championships, Far Western Championships, and Masters Nationals competitions over the years. The facility has been home to many professional swimmers, resulting in 71 Olympic medals.

Source: Facility Management, 2018.

5. COMPARABLE FACILITIES: Cascade Bay



FACILITY: Cascade Bay

City, State: Eagan, Minnesota

Owner: Eagan Parks and Recreation

Operator: Eagan Parks and Recreation

Cost: \$7.0 million

Key Facility Components: 25-meter, 6-lane pool
7 waterslides
Zero-depth entry with a splash pad
Current channel
Concessions
Mini Golf Course

Development: In 1997, the City Council decided to build a waterpark using a combination of an enterprise fund and a community investment fund. No tax money was used directly in the development of this facility. Construction began in 1998 and the facility opened in the summer of 1999 for \$7 million.

Tenants: No official tenants, rent to the Wise Swim School

Rental Rates: Daily admission rates range in price from \$7-\$11 depending on the time of day and the patron's age. Children under 12 months are free. Season passes are sold in family packages and run \$41-\$75 based on age and residential status. Cascade Bay hosts birthday parties for \$160 for ten guests with an additional \$16 per guest. The entire facility can be rented out for \$1,000 an hour, 2-hour minimum rental with a \$500 deposit.

Annual Events: Cascade Bay partners with local business, Wise Swim School to offer a variety of classes and camps including the Little Mates, Red Cross Waterpark Lifeguarding, Cardio Bay fitness activities, and snorkeling programs. In 2017, Cascade Bay's revenues totaled \$1,109,200 and expenses were \$1,085,900.

Source: Facility Management, 2018.

8. DEVELOPMENT OPTIONS: Grand Park



FACILITY: Grand Park

City, State: Westfield, Indiana

Owner: City of Westfield

Operator: Indiana Bulls, Indiana Sports Properties

Key Indoor Facility Components: 8 basketball/volleyball/futsal courts
3 full-sized soccer fields

Key Outdoor Facility Components: 26 baseball/softball fields
31 soccer fields (8 lighted)

Development: Adjacent to 220-acre entertainment district Grand Park Village \$49 million complex opened in 2014. The goal was to fund it entirely through TIF and sponsorship revenues, but the City Council lent the project \$6 million from an infrastructure fund \$8.5 million fieldhouse opened in January 2016 \$20 million privately-funded, 370,000 square-foot event center opened Summer 2016, is being leased by the City for 25 years at \$53 million (with interest)

Tenants:

- Diamond Sports – Operated by a subcontracted entity (Indiana Bulls / Bullpen Tournaments) who receives revenues and pays City a commission
- Multi-Sport Area – Managed by Indiana Sports Property (Management Contract) who is paid a management fee
- Concessions – Operated by a subcontracted entity (Urick Concessions) who receives all revenue and pays City a commission

Annual Events: Approximately 514,240 visitors during its last full year of operations
75 tournaments during 2015.
Annually estimated \$18 million in visitor spending

5. COMPARABLE FACILITIES: SC Johnson Aquatic Center



FACILITY: SC Johnson Community Aquatic Center

City, State: Racine, Wisconsin

Owner: Racine County

Operator: Racine Family YMCA

Cost: \$6.5 million

Key Facility Components:
 25-yard 8-lane lap pool
 Zero-depth entry pool
 Five waterslides
 Aquatic play structure
 Diving well
 Concessions stand
 4,800sf pool building w/ changing rooms

Development: Opened in June 2018
 SC Johnson donated the funds to construct the aquatic center
 Racine Family YMCA agreed to operate the complex based on the expectation that it would break even, or generate a modest profit.
 County responsible for capital repair and replacement
 Should operations no longer be profitable for the YMCA, the County would assume facility operations

