WILLIAMSON COUNTY SPORTS FACILITY MARKET, FEASIBILITY & IMPACT ANALYSIS

JUNE 2017

hunden strategic partners

SINKCOMBSDETHLEFS
SPORTS ARCHITECTURE

Key Questions

- What is the feasibility of developing a sports facility in Williamson County in order accommodate local and tournament play?
- What is the current supply of local and regional sports facilities in and around Williamson County? Are there gaps in the current supply or gaps in the quality of fields, courts and other sports facilities?
- What current and future market demand is likely for local, regional and tournament-based sports in Williamson County?
- What is the likelihood of attracting/securing tournaments in Williamson County? What trends may impact opportunities?
- Where are comparable facilities and what can be learned from these facilities?

Key Questions

- What other developments in the area? How do they impact Williamson County's project?
- What impact will the hotel market and hospitality package have on a new sports facility development?
- What scenarios are proposed?
- How will the proposed facility perform? How could it be governed for highest positive impact on the community?

Headlines

- There is more demand than supply of sports facilities throughout Williamson County.
- There are almost no sports tournaments held in Williamson County despite a large opportunity.
- A phased outdoor sports complex should be developed in Williamson County.
- An indoor sports complex is demanded by the market.
- Numerous sports (soccer, rugby, and lacrosse), as well as hockey, basketball, volleyball and baseball have a need for facility space in Williamson County.
- Location of the indoor and outdoor sport complexes will be important.

Headlines

- A-Game's situation has a big impact on the supply of basketball and volleyball venues. Additionally, it would be expensive and unlikely to have hockey at A-Game again.
- Funding and location are always critical challenges and should be studied in a next phase.
- Adept management/operator and local sport organizations are key to operating a successful new development.
- Recommended tournament level facility/complex will attract state, regional, and likely national events (if large enough and high enough quality).

Headlines

- Williamson County has key factors in its favor including:
  - A central, drivable location
  - Existing base of hotel rooms nearby
  - Favorable climate, longer season than northern competitors
- Williamson County's hotel market is healthy and benefiting from Nashville.
- Hotel rates in Williamson County are strong but still provide an opportunity to capitalize on tournament market as they are affordable on weekends.

PROJECT OVERVIEW

Project Overview

- Williamson County has grown to be a popular destination for youth/amateur sports teams and events both regionally and nationally.
- However, in early 2016, the privately-owned A-Game Sportsplex closed. Due to the closure, the County lost six courts and two sheets of ice.
- The impacts from the closure were immediately felt by indoor programs and the County.

A-Game Facility Events Lost 2014-2016

Event	Sport	Room Nights Lost
Battle in the Boro	Basketball	2,500
MyHockey (4 Tournaments)	Hockey	2,500
AAU 6th Grade Nationals	Basketball	1,892
Nike Music City Madness	Basketball	1,574
Music City Block Party	Volleyball	889
Showdown Hockey	Hockey	800
Total Package Hockey	Hockey	800
St. Patrick's Day Tournament	Volleyball	512
Club Clash I	Volleyball	396
Icebreaker MLK Kickoff Classic	Volleyball	360
Let-It-Shine	Gymnastics	350
A-Game Franklin Basketball Tournament	Basketball	325
2015 A-Game National Championship	Basketball	300
Big Bear Hockey	Hockey	300
Precision Edge Tune-Up	Hockey	284
AAU Boys & Girls Basketball	Basketball	278
Battle in Boro Fall Tournament	Basketball	250
Silver Stick Souther Regional	Hockey	250
Music City Invitational	Volleyball	248
Go Red Invitational	Volleyball	242
Brentwood Blastoff	Basketball	224
Nashville Open	Volleyball	212
Real Deal in the Ville	Basketball	212
Club Clash II	Volleyball	210
A-Game Music City Clash	Basketball	198
Who's Got Next	Basketball	198
A-Game Spring Shootout	Basketball	188
A-Game Summer Tip-Off	Basketball	175
Upward Stars - Play with Purpose	Basketball	150
Brentwood Team Camp	Basketball	128
Brentwood Invite	Basketball	109
Underclassman Exclusive	Basketball	32
Average	--	**534**
Totals	--	**17,086**

Source: Williamson County CVB

A-Game Facility

- Displacement of approximately 32 events and more than 17,000 room nights. Of the 17,000 room nights:
  - Basketball: 51 percent
  - Hockey: 29 percent
  - Volleyball: 13 percent

Williamson County Overall Lost Business (2014 – 2016)

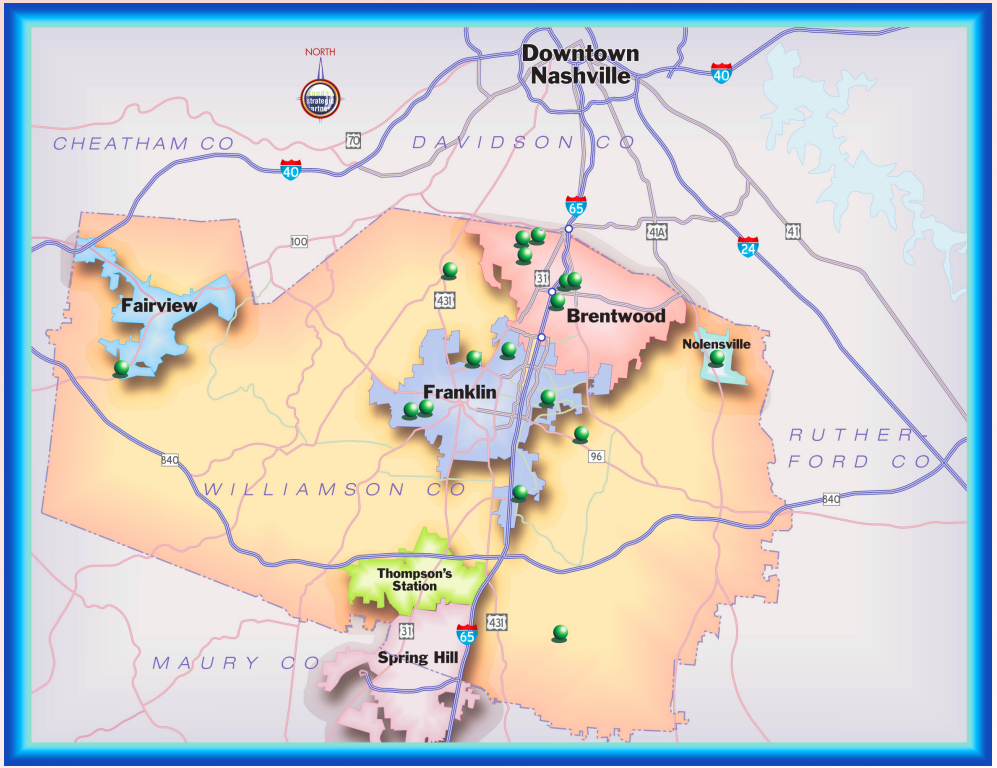
- 117 events lost by Williamson County over the time period; A-Game accounted for nearly 27 percent of the lost business due to its closure.
- Overall, 102,000 room nights lost in Williamson County between 2014 – 2016.
- 46 outdoor events and more than 37,000 room nights were lost during the period, and 39 indoor events and more than 47,000 room nights lost

Williamson County Lost Business
2014 - 2016

Sport	# of Events	Total Room Nights Lost	Average Room Nights Lost / Event
Indoor Sports			
Various	3	10,000	3,333
Wrestling	3	8,600	2,867
Cheer	4	7,200	1,800
Hockey	9	5,750	639
Basketball	6	3,750	625
Figure Skating	2	3,600	1,800
Weightlifting	2	1,671	836
Roller Hockey	1	1,650	1,650
Swimming	1	1,500	1,500
Volleyball	2	1,000	500
BMX	1	800	800
Gymnastics	1	800	800
Table Tennis	1	500	500
Cornhole	2	400	200
Broomball	1	200	200
Indoor Average	**3**	**3,161**	**1,203**
Indoor Total	**39**	**47,421**	**--**
Outdoor Sports			
Football	6	8,300	1,383
Lacrosse	9	7,800	867
Soccer	5	4,300	860
Flag Football	6	4,070	678
Triathlon	2	3,600	1,800
Softball	4	3,400	850
Baseball	4	2,740	685
Ultimate	4	1,225	306
Golf	3	900	300
Rugby	1	500	500
Cycling	2	400	200
Outdoor Average	**4**	**3,385**	**766**
Outdoor Total	**46**	**37,235**	**--**
A-Game Lost Business	**32**	**17,086**	**534**
Average	**4**	**3,768**	**1,000**
Totals	**117**	**101,742**	**--**

Source: Williamson County CVB

LOCAL SPORTS FACILITY ASSESSMENT



Local Sports Facility Supply Map

- Mix between City and County managed parks.
- Majority of facilities are in Franklin or Brentwood.
- Thompson Station, Nolensville, and Fairview are lacking in supply.
- Jim Warren Park, Williamson County Soccer Complex and Crockett Park are a few of the largest facilities in the County.

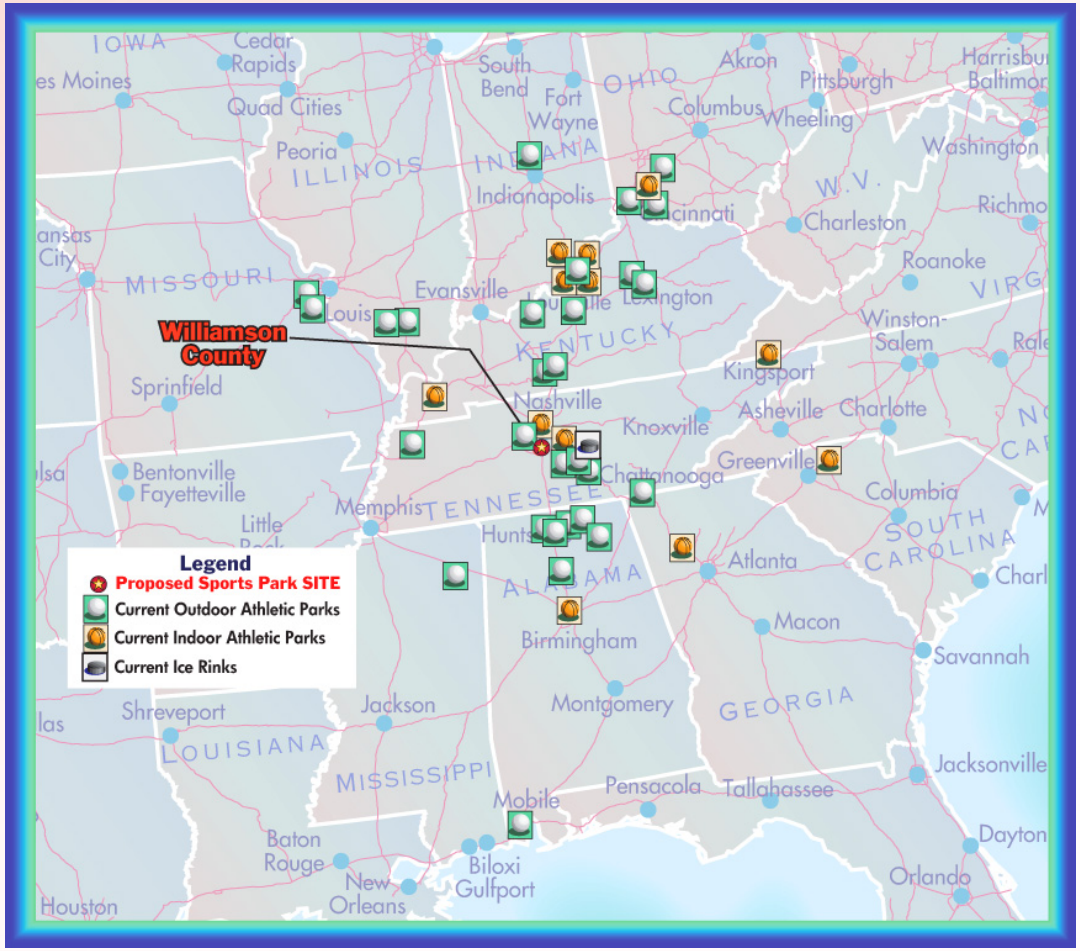
Local Supply Implications

- Despite a decent supply of baseball and soccer fields, scheduling playing time is difficult and tournament play is virtually impossible.
- Population growth has lead to inevitable demand growth for youth sports.
- A-Game closing has resulted in an extremely low supply of basketball, hockey and volleyball facilities.
- If A-Game re-opens, outdoor sports (soccer, baseball/softball) have greatest need for additional space. Lack of space limits the number of teams and number of tournaments.

REGIONAL & STATE SPORTS FACILITIES

Williamson County Regional Sports Facilities

- Williamson County's location relative to other locations in region is attractive to event organizers.
- Premier outdoor facilities exist to the north; however, Williamson County offers a more favorable season.
- A majority of regional indoor facilities accommodate local and regional demand. There is also a lack of a premier indoor facility throughout region.



Regional Supply Implications

- Regionally, some premier facilities exist for both indoor and outdoor sports, but Williamson County has the opportunity to capture regional, state, and national tournaments.
- Williamson County's access to/from Nashville and location within central Tennessee and the nation makes it an ideal location for tournament organizations.
- If the recommended facility is developed, it would be the premier facility in the Midwest, outside of Grand Park in Westfield.

CURRENT & FUTURE LIKELY MARKET DEMAND FOR LOCAL, REGIONAL & TOURNAMENT-BASED SPORTS

Basketball

- Basketball demand has outgrown current supply and is in need of facility space. However, re-opening A-game would satisfy majority of demand.
- Williamson County has ability to host large regional and national tournaments for indoor sports with a new indoor facility or re-opening A-Game.
- Programs are interested in partnering with County on a new indoor facility or with ownership of A-Game facility

Volleyball

- Volleyball programs have created unaccommodated demand after A-Game closure. Again, A-Game re-opening would satisfy demand.
- Local programs are interested in partnering with County on a new indoor facility or with ownership of A-Game facility.
- Williamson County has the ability to attract and retain large volleyball tournaments at a new facility or the A-Game facility.

Swimming

- Demand for pools in Williamson County is high; no high schools offer pools. All swimming programs are competing for pool time.
- Tournaments are turned down due to a lack of facility time.

Tennis

- Williamson County tennis courts are not tournament quality. Demand far exceeds supply of facilities.
- Many Williamson County tennis players are leaving the County for tennis needs.

Baseball / Softball

- Local baseball/softball demand can support additional facilities; a majority of participation comes from residents living within Williamson County; however organizations are utilizing fields outside of the County.
- Williamson County has the ability to host baseball/softball tournaments every weekend from April through July.
- Local and regional clubs have expressed interest in programming tournaments in Williamson County at a new facility.

Tennessee Secondary School Athletic Association

- Currently programming the wrestling state championship at Ag Expo Park in Williamson County. Have no plans to leave.
- Interested in Williamson County, due to its central location. Raised concerns about hotel rates.
- Football, basketball and Spring Fling (baseball, softball, tennis, track, and boys soccer) bid out – Spring Fling up for bid after 2017 season.

Soccer

- Soccer demand is strong and can support additional multipurpose fields.
- Field closures have been a big issue in recent years due to overuse of fields
- State and national associations are interested in programming tournaments in Williamson County.
- Local clubs and state associations have expressed interest in partnering with City on a multipurpose development

Williamson Inc.

- Chamber of Commerce has about 100 meetings and events per year, ranging from 250 to 800 people.
- Major need for a sports athletic facility, as multiple schools have been built – three new schools built in 2016.
- Financing would require both private and public support. Suggests taking a percentage of hotel/motel tax that is going to general fund and allocate it to project.

Thompson Station

- City is interested in a big sports complex at one location in Thompson Station.
- Thompson Station has great access and large number of green spaces that can be developed. No hotels in Thompson Station currently.
- City is interested in project but it needs to be master planned, and sewer and interchange improvements would be needed.

Franklin

- Sports athletic complex is needed in County, especially after A-Game closure.
- High local demand has caused maintenance issues with fields and diamonds – from just baseball, softball and soccer.
- Very strong baseball, softball, basketball and volleyball programs in County.
- City feels a shortage of diamonds exist, while County feels a shortage of multipurpose fields exist in Williamson County.

Brentwood

- A strong demand for additional sports facilities exists in County. Recreation is a large component.
- Brentwood has turned down tournament organizers because facilities would be unavailable to residents during tournaments.
- Brentwood requires that a percentage of sport participation be from Brentwood for facility use.

Demand Implications

- Cities within County are supportive of a sports facility in Williamson County.
- Community parks are for local rentals and parks and rec. Some out of town rentals occurring. Many local groups cannot find space for practice, games, etc.
- Soccer, baseball, softball, basketball and volleyball have programmed tournaments but have reached capacity. Growth and additional tournaments can only come with additional facilities.
- State associations, event organizers and local users are interested in bringing tournaments to Williamson County. Additionally, they are interested in being partners with any development.
- Williamson County's location is attractive to many tournament organizers.

Facility Demand Matrix

Williamson County Sports Supply and Demand Matrix

Sport	User Group Demand: Local Users	User Group Demand: Leagues	User Group Demand: Tournaments	Facility Demand: Low	Facility Demand: Medium	Facility Demand: High
Indoor						
Basketball	High	High	High			✓
Volleyball	High	High	High			✓
Wrestling	Medium	Low	Medium	✓		
Hockey	High	High	Medium			✓
Outdoor						
Soccer	High	High	High			✓
Football	Medium	Low	Low	✓		
Baseball	High	High	High			✓
Softball	High	High	High			✓
Lacrosse*	Medium	Medium	Medium		✓	
Rugby	Medium	Medium	Medium		✓	

* sport prohibited at most facilities

Source: Hunden Strategic Partners

- Greatest opportunities in Williamson County are for soccer, baseball, softball, basketball, hockey and volleyball facilities.
- However, other sports growing quickly: rugby and lacrosse.

Tournament Market Overview

- Tournament market is getting more competitive as events become more regionalized and more facilities open.
- Organizers are selecting one-site venues with close proximity to hotels, restaurants, retail and entertainment.
- Successful facilities are programming tournaments and events almost every weekend, while local use (practices, games, leagues) fill up weekdays.
- Tenants/user groups are key to baseline of support and establishing a credible reputation.
- Higher levels of tournament competition attracts greater interest from out-of-state teams.

Tournament Market Implications

- It is possible to attract regional and national events to Williamson County.
- Local and state organizations would likely relocate tournaments and/or create new events in Williamson County.
- Local and state organizations expressed possibility/interest in partnering/financing a new facility.
- Location within Tennessee and nation is attractive to tournament organizers for all sports.

COMPARABLE FACILITIES

Comparable Facilities

Comparable Facilities Summary

Facility	Location	Year Opened	Outdoor Facilities: Multipurpose Fields	Outdoor Facilities: Diamonds	Outdoor Facilities: Championship Field	Indoor Facilities: Basketball Courts	Indoor Facilities: Indoor Turf Fields	Indoor Facilities: Ice Rinks	Other
National Sports Center	Blaine, MN	1990	52	--	Yes	--	2	8	Golf Course, Velodrome
Maryland Soccerplex	Boyds, MD	2000	24	5	Yes	8	2	--	Tennis Courts, Aquatics Center, Meeting Center
Sports Village USA	Frisco, TX	2009	17	--	Yes	8	1	--	--
Westfield Grand Park	Westfield, IN	2014	31	26	--	8	3	--	Event Center
Average	**--**	**2003**	**31**	**16**	**--**	**8**	**2**	**8**	

Source: Various Facilities, Hunden Strategic Partners

- Comparable facilities show spectrum of facilities that are established, reaching stabilization and recently opened.

Case Studies – Summary

- National Sports Center – 600-acre indoor/outdoor complex that sees 4.25 million visitors per year.
- Maryland Soccerplex/Discovery Sports Center – 162-acre indoor/outdoor complex that had more than 650,000 visitors in 2015 – 95 percent of weekends are booked with events each year.
- Sports Village USA / Fieldhouse USA – 144,000SF facility that sees 1.5 million visitors, more than 31 tournaments and 25,000 participants per year that has generate more than 62,000 room nights since opening (2009).
- Grand Park – 400-acre complex that had more than 1.8 million visitors in 2016, primarily tournament use with minimal local use. Generated nearly 62,000 room nights in Hamilton County in 2015.

Case Studies – Overview

- Facilities are “category killers” focusing on one sport. Fewer large-scale multi-sport facilities due to space and budget constraints.
- Facilities partnering with national governing bodies to secure regional and national events annually (i.e. Disney with AAU).
- Facilities are typically permanent host sites (compared to rotational sites).
- Majority of facilities are owned publicly and managed by established local user groups.

WHAT ARE OTHER DEVELOPMENTS IN THE AREA? HOW DO THEY IMPACT WILLIAMSON COUNTY'S PROJECT?

U.S. Rugby & Sports Complex

TENNESSEE RUGBY FOUNDATION FINANCIAL ANALYSIS
Basic Assumptions 1

FACILITY			
Number of Fields	6	Spectator Seating	12,000
Championship	2	Bleachers	10,000
Add'l Lighted Fields	4	Berm	2,000
Land Acreage	100-120	Parking Spaces	2,000
Clubhouse Size (sq ft)	17,250	D1 Athletic Graining Facility (sq ft - approx.)	23,000
Residence Hall (sq ft)	20,000		
Office Building/ Hall of Fame (sq ft)	20,000	Other Buildings	3
		Support Facility (sq ft)	2,000
		Outdoor Pavilion (sq ft)	1,000
		Bathrooms - 6x (sq ft)	3,000

- Looking to become a U.S. Olympic certified complex to program Olympic training.
- Multipurpose fields will be programmed for all foot-sports.
- Interested in speaking to Williamson County first about development – currently speaking to Metro Nashville.

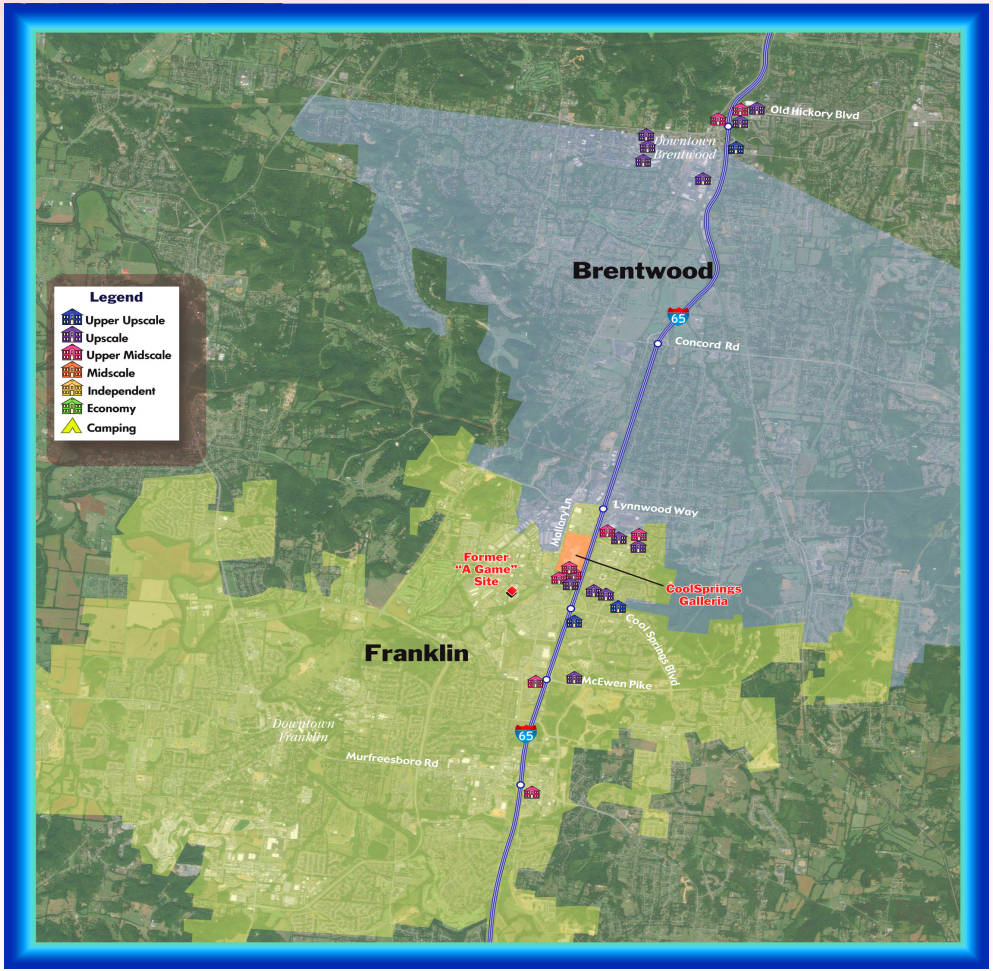
U.S. Rugby & Sports Complex

- Tennessee Rugby Foundation is working to develop a U.S. Rugby and Sports Complex in middle Tennessee.
- Complex will need 100-120 acres. Complex will be open for all sports, rugby will be allocated a certain percentage of usage at complex.
- Management model has not been determined, open to listening to local users and/or sports groups about management options.
- Projected to move international rugby tournaments to facility that will bring 85,000 people worldwide.
- Interested in a public-private partnership for complex.

HOTEL & HOSPITALITY MARKET

Williamson County Competitive Set Map

- Primarily located along I-65 in Franklin and Brentwood.
- Large concentration of hotels around Cool Springs Galleria.
- No hotels in Nolensville, Fairview and Thompson Station.



Williamson County Hotel Summary

Lodging Summary: Williamson County

Chain Scale	Rooms	% of Total Rooms	Hotels	Rooms per Hotel	Avg. Opening Year	Avg. Age in Years
Luxury	--	--	0	--	--	--
Upper Upscale	--	--	0	--	--	--
Upscale	1,633	32%	12	136	Dec-01	14
Upper Midscale	2,007	40%	13	154	Nov-99	16
Midscale	893	18%	10	89	Nov-90	25
Economy / Independent	540	11%	7	77	May-93	23
Total / Average	**5,073**	**100%**	**42**	**121**	**Jan-93**	23

Source: Smith Travel Research, Hunden Strategic Partners

- More than 2,000-rooms are Upper Midscale with 5,000-rooms in competitive set.
- 42 hotels averaging 121-rooms per hotel.
- 12 hotels with more than 1,600-rooms planned or in development.

Occupancy - Day Of Week By Month

- Occupancy is healthy and could impact ability to secure tournaments, but location is very desirable.

Occupancy Percent by Day of Week by Month - April 2015 - March 2016

	Sunday	Monday	Tuesday	Wednesday	Thursday	Friday	Saturday	Avg
Jun - 15	52.8%	78.7%	91.3%	85.9%	84.1%	90.9%	88.3%	82.2%
Jul - 15	45.3%	76.4%	88.8%	86.2%	68.2%	65.6%	72.8%	71.2%
Aug - 15	56.2%	70.3%	85.7%	85.8%	77.8%	87.9%	93.1%	79.9%
Sep - 15	57.0%	86.3%	92.5%	90.1%	80.9%	82.4%	84.6%	82.1%
Oct - 15	41.2%	69.3%	77.7%	81.7%	74.5%	75.8%	71.2%	69.2%
Nov - 15	44.9%	61.9%	67.2%	66.1%	61.7%	54.9%	62.6%	60.4%
Dec - 15	34.6%	65.0%	77.4%	76.1%	56.0%	57.8%	53.3%	58.9%
Jan - 16	41.1%	70.5%	85.0%	84.5%	68.6%	75.7%	74.5%	71.4%
Feb - 16	43.9%	81.9%	91.4%	89.5%	80.1%	93.3%	84.1%	81.2%
Mar - 16	52.8%	87.6%	96.0%	90.3%	79.9%	93.2%	92.4%	85.1%
Apr - 16	49.5%	76.6%	90.7%	92.2%	78.5%	88.7%	90.7%	80.1%
May - 16	59.1%	94.2%	99.5%	92.6%	85.9%	90.0%	87.7%	87.2%
Average	**47.8%**	**76.4%**	**86.8%**	**85.0%**	**75.1%**	**79.9%**	**79.4%**	

Sources: Smith Travel Research

	75-80
	80-90
	> 90

ADR - Day Of Week By Month

- Rates are healthy and reaching tournament threshold.
- Weekend rates provide opportunity for tournaments and events.

ADR by Day of Week by Month - April 2015 - March 2016

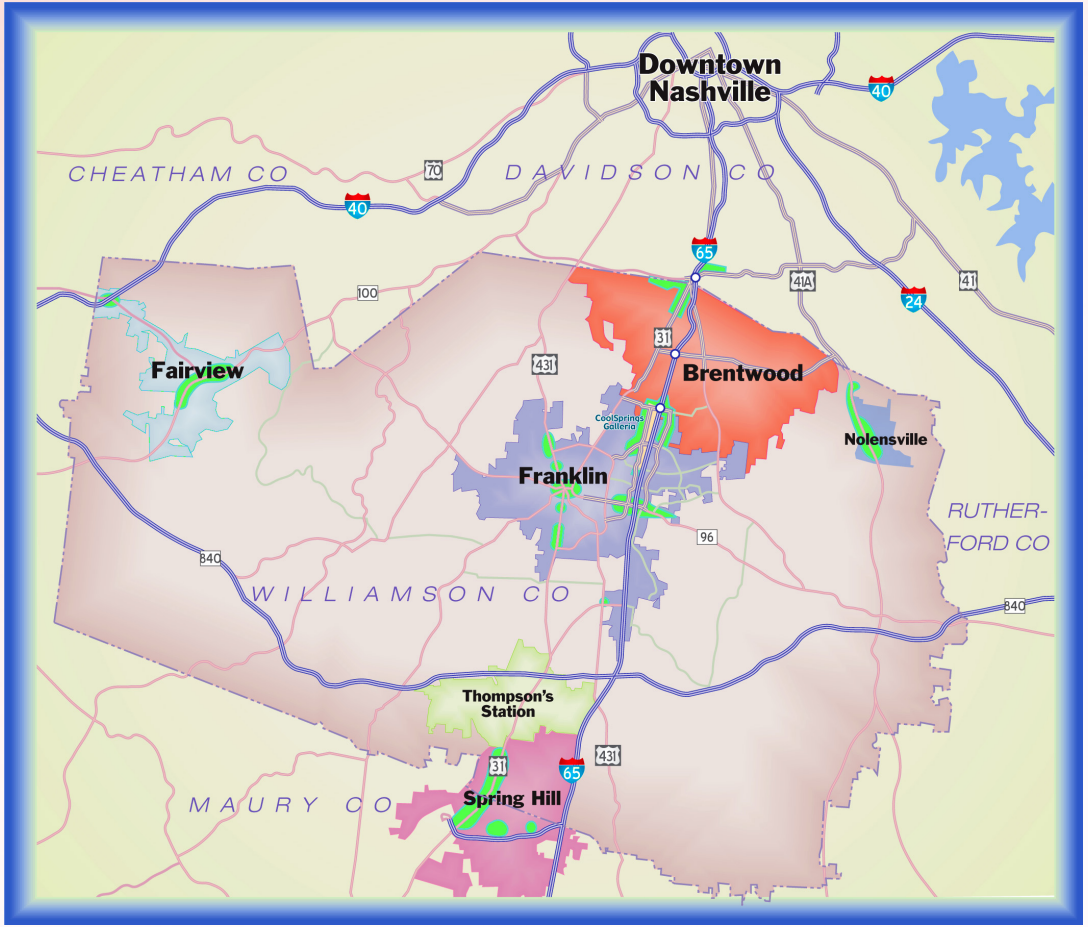
	Sunday	Monday	Tuesday	Wednesday	Thursday	Friday	Saturday	Avg
Jun - 15	123.07	138.27	145.33	144.26	138.88	136.40	133.90	138.19
Jul - 15	119.11	137.42	144.57	141.68	128.25	116.71	117.53	130.48
Aug - 15	122.31	136.41	141.26	141.68	134.87	136.93	139.09	137.19
Sep - 15	127.09	145.58	153.29	151.95	141.49	142.61	144.93	144.70
Oct - 15	121.17	137.37	145.35	146.31	132.44	126.47	122.17	133.98
Nov - 15	111.15	126.57	134.11	132.10	126.92	108.73	108.25	122.94
Dec - 15	123.59	139.09	143.26	142.05	129.82	117.05	117.12	130.99
Jan - 16	121.33	139.40	147.41	146.88	132.12	123.04	123.26	134.82
Feb - 16	126.05	143.31	149.75	148.73	138.24	137.41	136.82	141.69
Mar - 16	131.08	148.98	157.39	154.77	140.90	143.11	141.26	146.10
Apr - 16	124.68	146.03	153.98	153.10	141.90	138.08	135.95	143.28
May - 16	133.71	151.32	160.14	156.75	146.10	143.49	140.16	148.60
Average	**124.07**	**141.52**	**148.51**	**147.15**	**136.93**	**133.03**	**131.72**	

Sources: Smith Travel Research

	130-140
	140-150
	> 150

Restaurant Node Summary

- Nearly 500 restaurants in Williamson County.
- 82 percent of restaurants are in Franklin & Brentwood.
- Only three restaurants in Thompson Station, and facility would use hospitality package in Franklin or Brentwood.



Hotel & Hospitality Market Implications

- Majority of hotels are located in Franklin and Brentwood.
- Occupancy and ADR are healthy but provide opportunity for Williamson County to appeal to youth sports market.
- Hotel market in Williamson County benefits from the high rates in Nashville.
- Summer is a busy travel season generally, but not sold out. Room for tournaments to block rooms before leisure travelers book. Will compress rates up for leisure.
- July through September are lowest cost months for rooms during season, which teams prefer.

Hotel & Hospitality Market Implications

- Sports event organizers want hotel properties that offer breakfast options, meeting/event space for team functions and double-bed rooms. Hampton Inn with free breakfast and similar brands are preferred.
- Proximity to other attractions and entertainment is critical for events to partner with, provide options for visitors.
- Majority of restaurants are in Franklin and Brentwood
- Thompson Station lacks the hotel and hospitality package needed for tournament organizers.

RECOMMENDATIONS

Indoor Facility Recommendations

Williamson County Athletic Complex - Indoor Recommendations

Facility	A-Game Remains Closed	A-Game Re-Opens*
Hardwood Courts		
Basketball Courts	10	4
Volleyball Courts	20	8
Ice Sheets	2	1
Indoor Turf Fields	2	2
Circulation, Amenities, Concessions	✔	✔
Locker Rooms	✔	✔
Parking Spaces	1,200	800

*Recommendations are in addition to A-Game facility

Source: Hunden Strategic Partners

Indoor Facility Recommendations - Costs

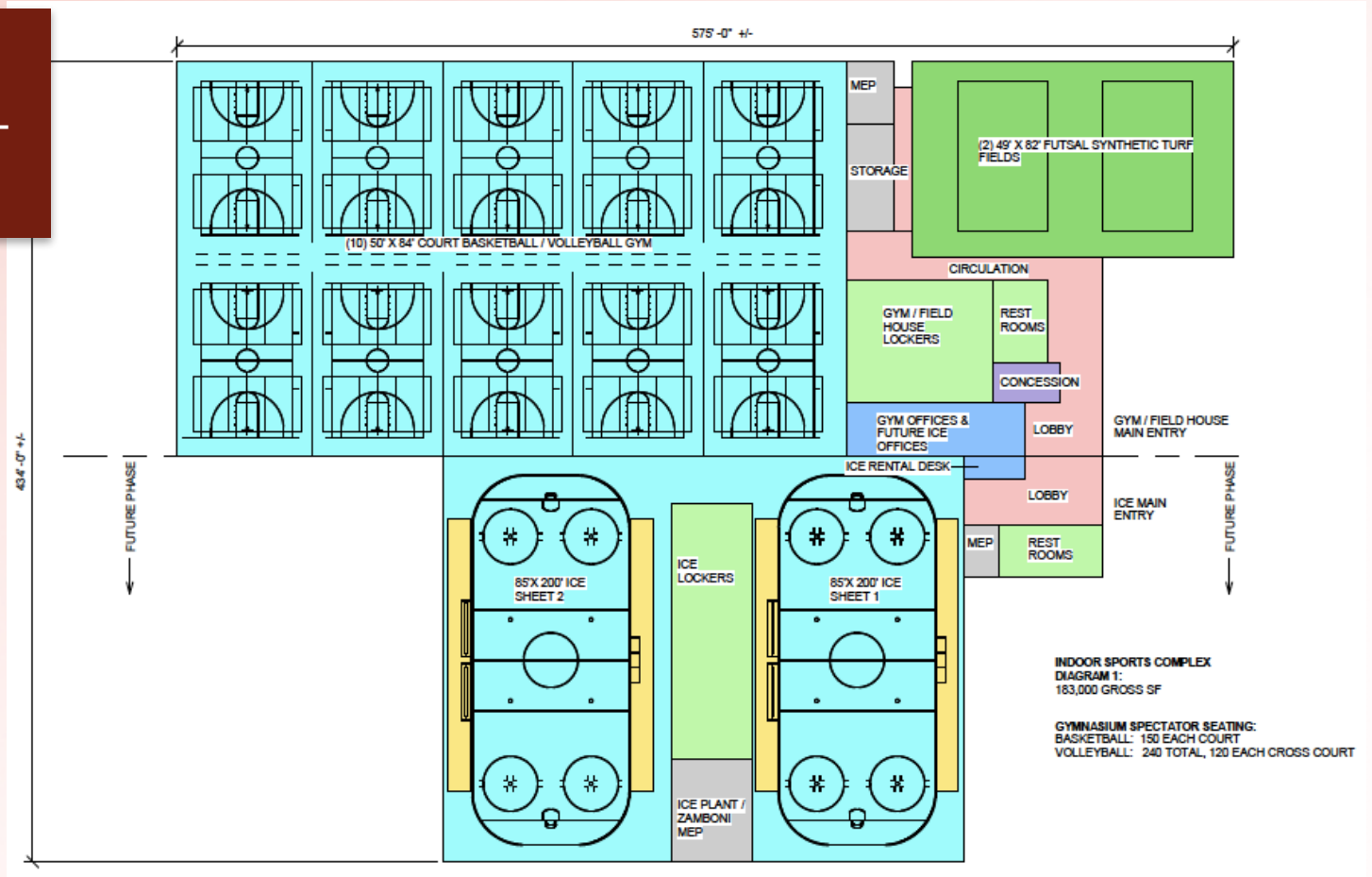
Williamson County Athletic Complex - Indoor Cost Estimates

Item	Full Build Out
General Requirements	$2,183,000
Construction Costs	$44,251,000
Project Costs	$19,158,000
Total*	**$65,593,000**

*Facility Costs Only, Escalated to reflect 2018 dollars

Source: Sink Combs Dethlefs, Hunden Strategic Partners

Indoor Facility Recommendations – Site Concept



Outdoor Facility Recommendations

Williamson County Athletic Complex - Outdoor Recommendations

Facility	Full BuildOut	Phased Build Out	
		Phase I	Phase II
Multipurpose Fields	24	12	12
Synthetic Turf	8	4	4
Natural Grass	16	8	8
Baseball/Softball Diamonds	12	8	4
Concession/Restrooms	5	3	2
Circulation, Amenities	✔	✔	✔
Parking Spaces	3,600	2,000	1,600

Source: Hunden Strategic Partners

Indoor Facility Recommendations - Costs

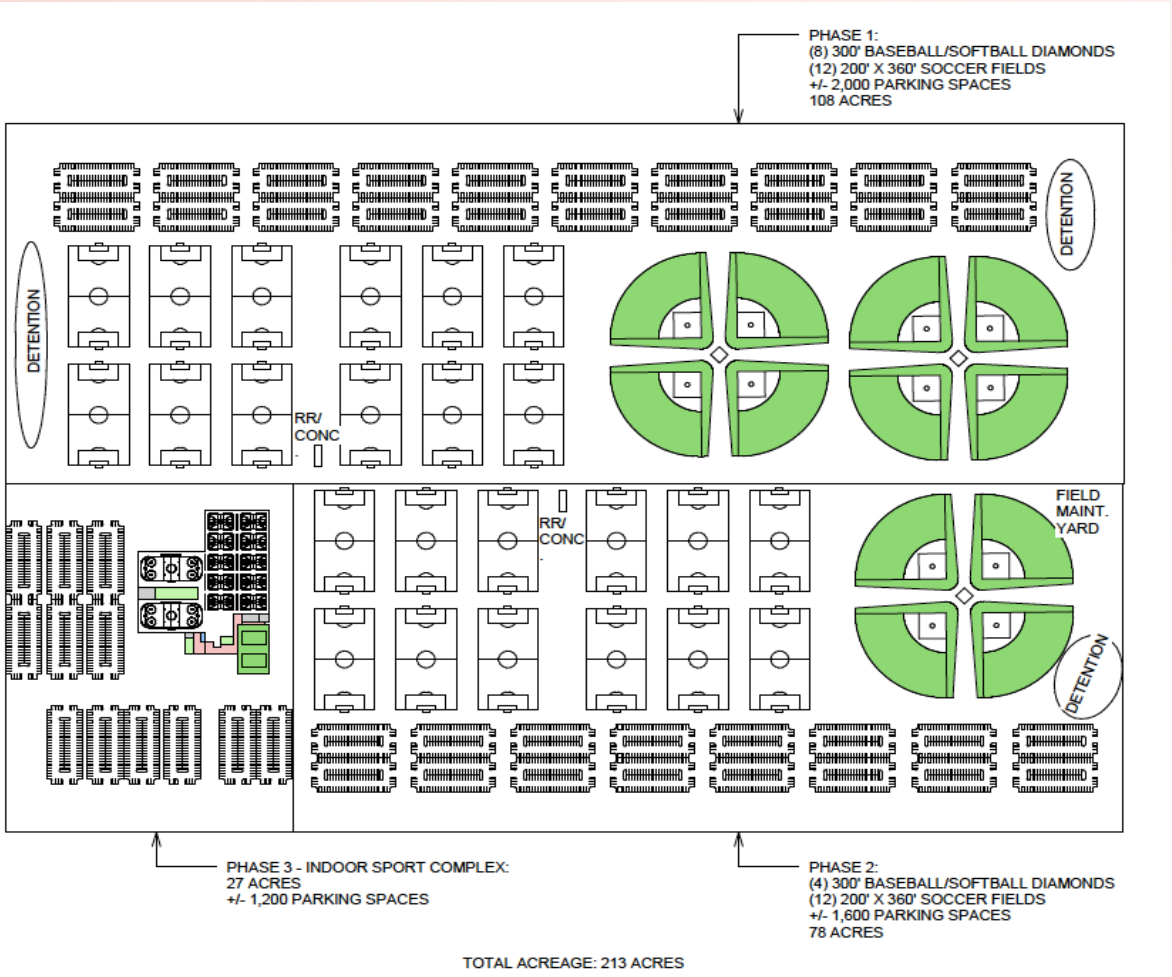
Williamson County Athletic Complex - Outdoor Cost Estimates

Item	Full Build-Out	Phased Build Out	
		Phase I	Phase II
General Requirements	$545,000	$328,000	$217,000
Construction Costs	$42,544,000	$24,656,000	$17,888,000
Project Costs	$17,869,000	$10,356,000	$7,513,000
Total*	**$60,958,000**	**$35,340,000**	**$25,618,000**

*Facility Costs Only, Escalated to reflect 2018 dollars

Source: Sink Combs Dethlefs, Hunden Strategic Partners

Indoor Facility Recommendations – Site Concept



Development Recommendation Priorities

Williamson County Development Priority Recommendations

Priority	A-Game Remains Closed	A-Game Re-Opens
1	Indoor - Scenario One	Outdoor - Scenario One
2	Outdoor - Scenario One	Outdoor - Scenario Two
3	Outdoor - Scenario Two	Indoor - Scenario One

Source: Hunden Strategic Partners

DEMAND & FINANCIAL PROJECTIONS

Demand and Financial Projections

Williamson County Sports Complex - Stabilized Event Summary

	Outdoor Scenarios		Indoor Scenarios	
Net New	**Full Build Out**	**Phased Build Out**	**A-Game Closed**	**A-Game Re-Opens***
Events	407	403	101	82
Tournaments	82	78	46	43
Attendance	243,832	239,089	335,300	146,900
Revenues (000s)	$1,731	$1,685	$2,342	$1,410
Expenses (000s)	$2,031	$2,100	$2,593	$1,871
Net Operating Income (000s)	($299)	($415)	($250)	($462)

Source: Hunden Strategic Partners

ECONOMIC, FISCAL & EMPLOYMENT IMPACT ANALYSIS

Impact Analysis

Williamson County Sports Complex - Summary of 20-Year Impacts

	Outdoor Scenarios		Indoor Scenarios	
Net New	**Full Build Out**	**Phased Build Out**	**A-Game Closed**	**A-Game Re-Opens***
Hotel Room Nights	1,027,031	916,714	1,183,101	490,387
Total Spending (millions)	$778	$706	$698	$290
Total Earnings (milions)	$195	$177	$171	$71
FTE Jobs	889	852	929	387
County Taxes Collected (miillions)				
Sales Tax (2.25%)	$11,275	$10,240	$9,994	$4,152
Hotel Tax (4.0%)	$7,282	$6,617	$8,305	$3,450
Total Taxes Collected	$18,557	$16,857	$18,299	$7,602

*Recommendations are in addition to A-Game facility

Source: Hunden Strategic Partners

OPERATING MODELS / GOVERNANCE

Operating Models

- Public
  - Operated as a public facility
  - Programmed with recreational programs, rented by club programs
  - Revenues & expenses: All public
- Private Non-Profit
  - Operated by foundations, tenants
  - Revenues & expenses: All non-profit organization
- Public-Private Partnership
  - Publicly owned and privately operated
  - Tenant(s) program facility, public assists in maintenance and capital costs.
  - Revenues & expenses: Shared
- Private For-Profit
  - New companies emerging with minimal-tested experience
  - Revenues & expenses: All private

Governance

- Governance and management: needs to be very proactive
  - Experienced in securing and executing events
  - Experienced in marketing events
  - Has established network of relationships/partnerships

QUESTIONS?