

PREFACE

In November 2014, Brailsford & Dunlavey, Inc. (“B&D”) was retained by the City of Alexandria Recreation Parks & Cultural Activities (“RPCA”) to conduct a study evaluating the viability of a field house facility at the location of the current Patrick Henry Recreation Center (the “Study”). B&D’s engagement on this assignment was limited to the provision of a preliminary market analysis, an evaluation of comparable facilities located near the proposed site, and the provision of recommendations for additional analysis.

INTRODUCTION

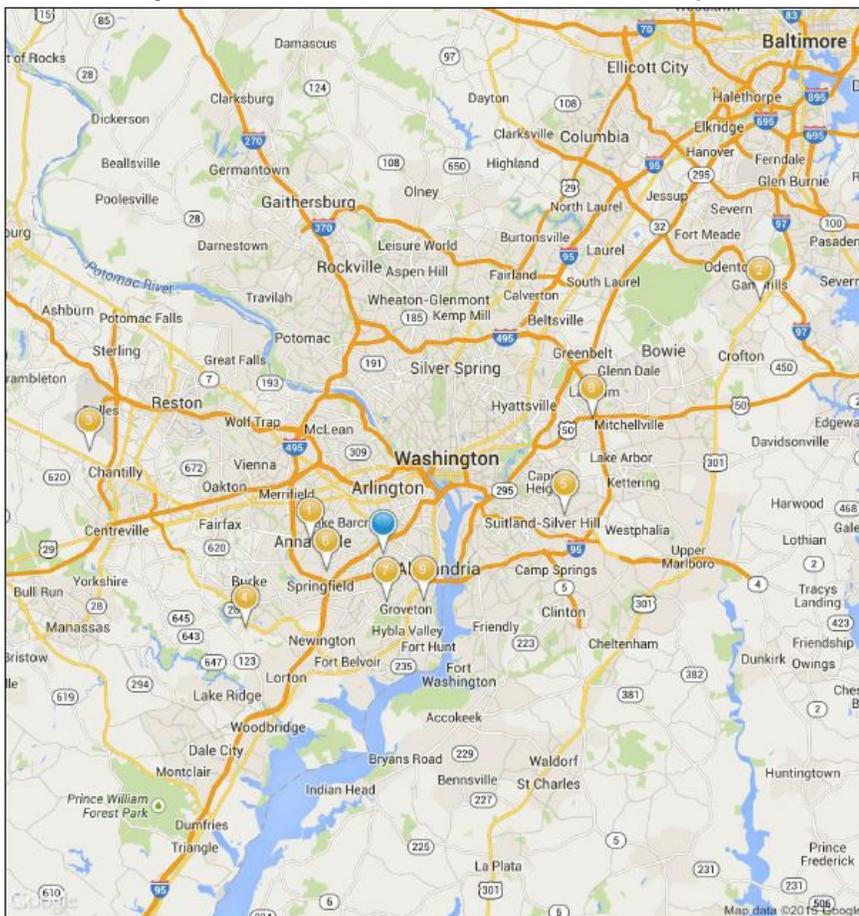
In November 2014, Brailsford & Dunlavey, Inc. (“B&D”) was retained by the City of Alexandria Recreation Parks & Cultural Activities (“RPCA”) to conduct a study evaluating the viability of a field house facility at the location of the current Patrick Henry Recreation Center (the “Study”). The field house will become part of the overall development of the new Patrick Henry PK-8 School and RPCA was interested in evaluating alternatives to their traditional recreation center concepts to accommodate demand in the city for evening field rental without having to light existing fields, which is often controversial.

BACKGROUND

This Study analyzed unmet market demand, identified programmatic options, and evaluated operating costs and revenues for a proposed field house to be located at the Patrick Henry Elementary School site in Alexandria, Virginia. Detailed market analyses and case studies were conducted to establish preliminary program needs, which were then translated into a recommended facility size.

PRELIMINARY MARKET ANALYSIS

B&D evaluated the supply of similar field-house facilities located near the proposed project site and identified eight facilities which are shown below in Map 1.



1. Fairfax Athletic Club
2. A.P.I
3. NOVA Field House
4. South Run Rec Center
5. Capital SportsPlex
6. Fairfax Sports Complex
7. Lee Center
8. Soccer Dome III
9. Mount Vernon Rec Center

Map 1: Competitive Facilities

B&D reviewed each facility to develop a side-by-side comparison of amenities and programs. Table 1.0 below provides a summary.

On average, the competitive facilities offer a range of mid-size turf fields, flex courts, a meeting/party rental room, and (in two of the facilities), an indoor track. The sports typically offered include soccer, lacrosse, football, volleyball, basketball, and futsal. Most of the facilities host both adult and youth leagues, as well as tournaments and summer camps.

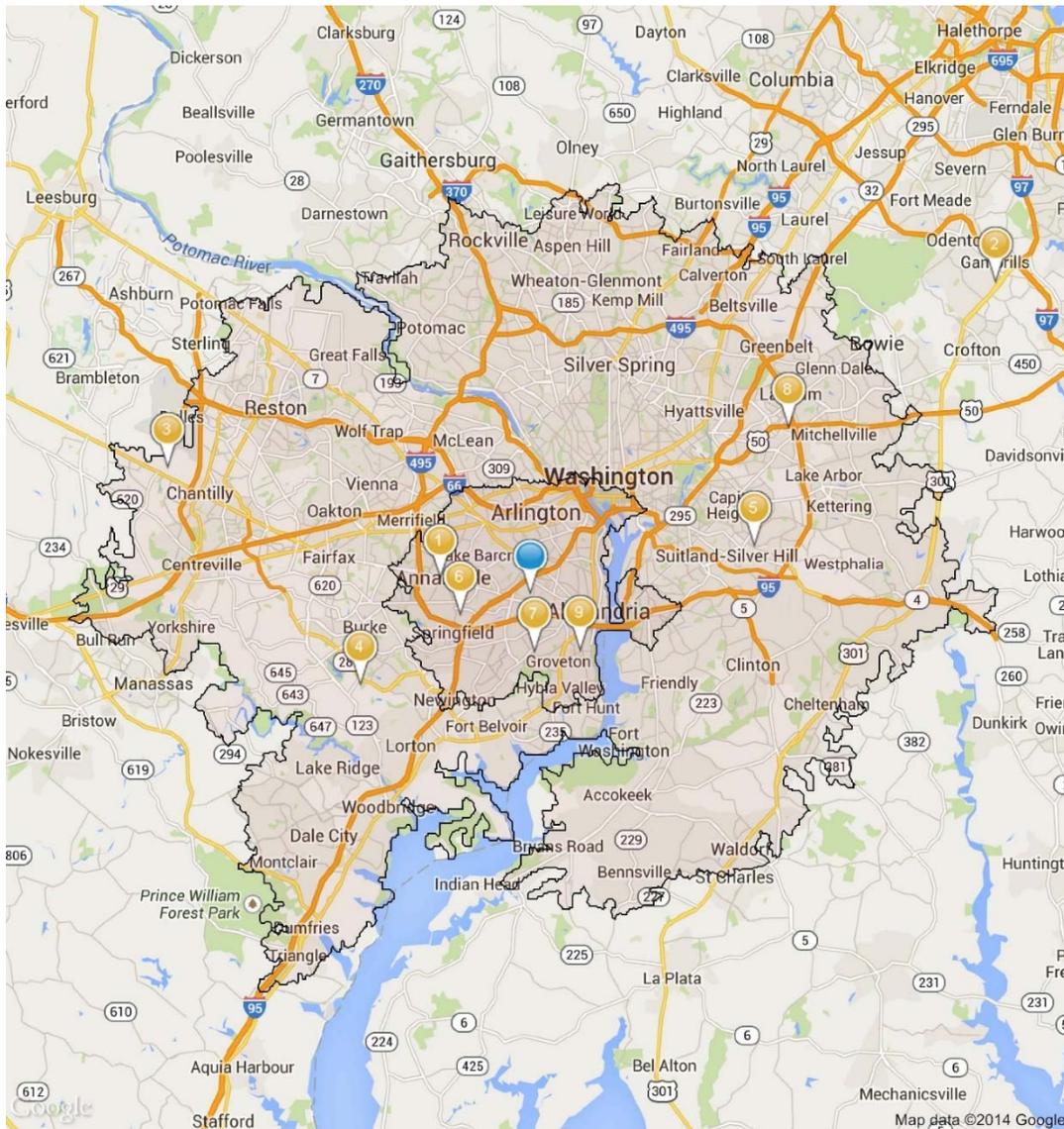
Facility Number	1	2	3	4	5
Facility Name	Fairfax Athletic Center	A.P.I	NOVA Field House	South Run Rec	Capital SportsPlex
Facility Address	4317 Ravensworth Rd Annandale	740 MD Route 3 South, Gambrills, MD 21054	14810 Murdock Street, Chantilly, Virginia	7550 Reservation Drive, Springfield, VA 22153	10011 Good Luck Rd, Glenn Dale Maryland 20769
Area	Not Available	55,000	35,530	24,000	45,000
Turf Fields	2	2 (200x100, 160x120)	2 (170x97)	1 (160x100)	2
Flex Courts	2	2 (7,500)	1 (94x50)	2 Outdoor	No Court
Track	No Track	4 lane/60 meter	No Track	No Track	No Track
Meeting/Party Room	Not Available	1000 S.F	1,134 S.F	NO Meeting/Party Room	2 x 1000 S.F
Distance From Site (Miles)	5.4	38.8	27	14	26
Drive Time (Min)	14	50	40	22	30
	Private	Private	Private	Public	Private
Uses					
Soccer	X	X	X	X	X
Futsal	X	NO	X	NO	X
Lacrosse	X	X	X	X	
Football	X	X	X	X	X
Field Hockey	X	X	X	X	X
Volleyball	X	X	X	NO	X
Basketball	X	X	X	NO	X
Ice Hockey	NO	NO	NO	NO	NO
Skating	NO	NO	NO	NO	NO
Gymnastics	NO	NO	X	NO	NO

Facility Number	6	7	8	9	
Facility Name	Fairfax Sportsplex	Lee Center	Soccer Domelli	Mount Vernon Rec	
Facility Address	6800 Commercial Dr, Springfield, VA 22151	6601 Telegraph Road Franconia, Virginia	8400 ARDWICK ARDMORE RD LANDOVER, MD 20785	2017 Belle View Blvd, Alexandria, VA 22307	
Area	Not Available	20,400	20,000 +	Not Available	
Turf Fields	5 (115x70)	No Turf Fields	3 (60x30) 1 (30x11)	No Turf Fields	
Flex Courts	2	1 big divided 2 small	1 (60x27)	No Flex Courts	
Track	No Track	3 lane 1/10th mile	No Track	No Track	
Meeting/Party Room	No Meeting/Party Room	Not Available	Table Space	Not Available	
Distance From Site (Miles)	5.3	5.8	24.5	6	
Drive Time (Min)	15	13	32	15	
	Public	Public	Private	Public	
Uses					
Soccer	X	No	X	NO	
Futsal	NO	NO	NO	NO	
Lacrosse	NO	NO	NO	NO	
Football	NO	NO	NO	NO	
Field Hockey	NO	NO	NO	NO	
Volleyball	X	X	NO	NO	
Basketball	NO	X	NO	NO	
Ice Hockey	NO	NO	NO	X	
Skating	NO	NO	NO	X	
Gymnastics	NO	X	NO	NO	

Table 1.0: Competitive Facilities

MARKET AREA DEMOGRAPHICS

B&D evaluated market area demographic characteristics in order to compare the area surrounding the proposed Patrick Henry site with the locations of the case study facilities discussed below. These demographic characteristics also allow B&D to preliminarily evaluate market demand based upon a comparison with national sports participation data. In order to perform this analysis, B&D used mapping software to identify 20 and 40 minute drive time area surrounding the proposed site. Map 2.0 below provides an overlay of these two drive time areas along with the eight competing facilities identified in Map 1.0. Based upon the locations of competing facilities in the 20-minute drive area, the proposed facility is more likely to draw patrons from within the City of Alexandria or areas directly to the North than it is from areas South or West.



Map 2.0: 20- and 40-minute drive times

B&D compared population, age breakdown, and household income distribution in the 20 and 40 minute drive areas surrounding the proposed facility. As shown in Table 2.0, below, in 2014 the 20-minute drive area had a population of 749,133 residents and thirty-five percent (35%) of the residents in the 20 and 40-minute drive areas are between the ages of 20 and 39, which is well above the DC, regional, and national percentages. These individuals could provide a critical patron base for the proposed facility since they participate regularly in recreational activities.

	10-20 Minute Drive Time	20-40 Minute Drive Time	Washington, DC MSA	United States
Total Population				
2010 Census	697,273	5,303,723	5,636,232	308,745,538
2104 Estimate	749,133	5,602,114	5,952,645	314,419,291
2019 Projection	816,037	5,968,946	6,372,350	323,000,000
Age Distribution				
Age 19 Years or Less	22%	28%	26%	27%
Age 20 to 39 Years	35%	35%	29%	26%
Age 40 to 64 Years	32%	37%	34%	33%
Age 65 Years or Over	11%	13%	12%	13%
Household Income Distribution				
HH Income \$150,000 or More	11%	10%	11%	3%
HH Income \$100,000 to \$149,999	8%	7%	7%	1%
HH Income \$75,000 to \$99,999	6%	5%	5%	4%
HH Income \$50,000 to \$74,999	6%	6%	6%	7%
HH Income \$35,000 to \$49,999	3%	3%	3%	4%
HH Income \$25,000 to \$34,999	2%	2%	2%	4%
HH Income \$15,000 to \$24,999	2%	2%	2%	4%
HH Income \$10,000 to \$14,999	3%	3%	2%	5%

Table 2.0: Market Demographics

Household income within a market area is a key determiner of a recreational facility’s success. At \$118,543 and \$121,179 respectively, both the 20 and 40-minute drive areas have high average household incomes, which presents a very favorable indicator of high participation.

The National Sporting Goods Manufacturers Association (NSGA) in its *2013 Sports Participation in the USA* 2013 edition states that the vast majority of recreational users will be between 20 and 39 years of age and earning household incomes of \$100,000 or more annually.

Utilizing data from the NSGA Sports Participation in the USA 2013 edition, Table 3.0, below, indicates the national participation rates for frequent participants (50+ times/year) between the ages of 25-39, then applies those rates against the age distribution for the 20 minute drive area to predict the population of core participants residing within that geography.

Sport	National Participation	10-20 min Participation
Volleyball	2%	11964
Soccer	3%	18867
Football	1%	7921
Lacrosse	1%	3979
Running	6%	40373
Basketball	5%	18867

Table 3.0: Participation Data

The strong market area demographics and the large quantity of core participants predicted is strong indicator of demand for the types of programs found within the typical field house facility. The presence of four competing facilities within the 20 minute drive area is also an indicator of strong market support for the facility type under consideration.

CASE STUDIES

B&D conducted case study analyses of several regional field houses in order to gain an understanding of their programmatic offerings, featured amenities, and major revenue opportunities. The indoor field houses included in this analysis are multi-use facilities that offer athletic and recreational opportunities to members of the community through youth camps, clinics, and youth and adult league play. Flag football, indoor soccer, basketball, and indoor lacrosse were sports commonly available for league play or other activities among the facilities.

B&D targeted the following five facilities to conduct case studies based on the breadth of programs and activities offered, the size and quality of the facility, in addition to geographic and demographic similarities to the Patrick Henry site.

- Fairfax Athletic Center
- A.P.I
- NOVA Field House
- South Run
- Capital SportsPlex

Table 4.0 provides an overview of the programs and facility amenities included within each of the case study sites.

Facility Number	1	2	3	4	5
Facility Name	Fairfax Athletic Center	A.P.I.	NOVA Field House	South Run Rec	Capital SportsPlex
Facility Address	4317 Ravensworth Rd Annandale	740 MD Route 3 South, Gambrills, MD 21054	14810 Murdock Street, Chantilly, Virginia	7550 Reservation Drive, Springfield, VA 22153	10011 Good Luck Rd, Glenn Dale Maryland 20769
Area	Not Available	55,000	35,530	24,000	45,000
Turf Fields	2	2 (200x100, 160x120)	2 (170x97)	1 (160x100)	2
Flex Courts	2	2 (7,500)	1 (94x50)	2 Outdoor	No Court
Track	No Track	4 lane/60 meter	No Track	No Track	No Track
Meeting/Party Room	Not Available	1000 S.F	1,134 S.F	NO Meeting/Party Room	2 x 1000 S.F
Distance From Site (Miles)	5.4	38.8	27	14	26
Drive Time (Min)	14	50	40	22	30
	Private	Private	Private	Public	Private
Uses					
Soccer	X	X	X	X	X
Futsal	X	NO	X	NO	X
Lacrosse	X	X	X	X	
Football	X	X	X	X	X
Field Hockey	X	X	X	X	X
Volleyball	X	X	X	NO	X
Basketball	X	X	X	NO	X
Ice Hockey	NO	NO	NO	NO	NO
Skating	NO	NO	NO	NO	NO
Gymnastics	NO	NO	X	NO	NO
Programs					
Home School	NO	X	NO	NO	NO
Tournaments	X	X	X	X	X
Adult Leagues	X	X	X	X	X
Youth Leagues	X	X	X	X	X
Family Gathering	X	X	X	X	X
Camps	X	X	X	X	X
Concerts	NO	NO	NO	NO	X
Rentals	X	X	X	X	X

Table 4.0: Case Study Facilities

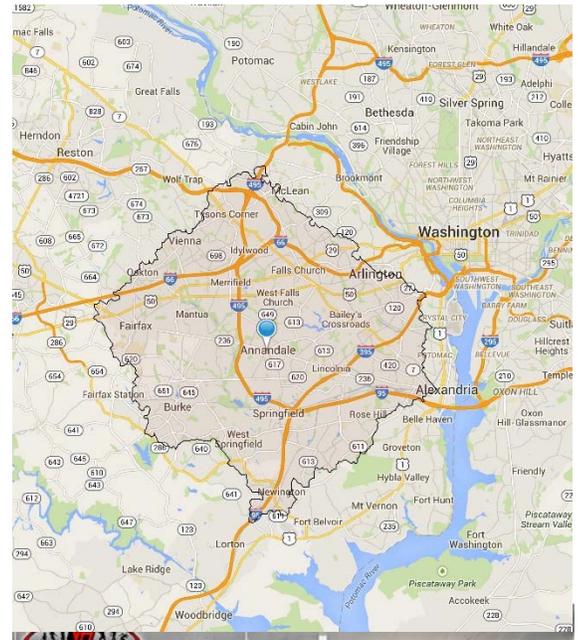
The indoor field houses included in this analysis are multi-use facilities that offer athletic and recreational opportunities to members of the community through youth camps, clinics, and youth and adult league play. Flag football, indoor soccer, basketball, and indoor lacrosse were sports commonly available for league play or other activities among the facilities.

FAIRFAX ATHLETIC CENTER (KIDS CHOICE SPORTS CENTER)

Fairfax Athletic Center is a privately owned and operated sports complex located in Annandale, Virginia roughly 5.5 miles from the proposed Patrick Henry site. The facility includes two turf fields, two flex courts and offers both court and field rentals, and offers both youth and adult soccer leagues.

	Patrick Henry	Fairfax Athletic Club	
Total Population			
2010 Census	697,273	780,193	
2014 Estimate	749,133	840,962	
2019 Projection	816,037	731,847	
Age Distribution			
Age 19 Years or Less	22%	183504	22%
Age 20 to 39 Years	35%	241894	29%
Age 40 to 64 Years	32%	261133	31%
Age 65 Years or Over	11%	93663	11%
Household Income Distribution			
HH Income \$150,000 or More	27%	91639	31%
HH Income \$100,000 to \$149,999	20%	60308	20%
HH Income \$75,000 to \$99,999	14%	38,925	13%
HH Income \$50,000 to \$74,999	16%	43,979	15%
HH Income \$35,000 to \$49,999	8%	23,092	8%
HH Income \$25,000 to \$34,999	5%	13,768	5%
HH Income \$15,000 to \$24,999	5%	12,596	4%
HH Income \$10,000 to \$14,999	6%	12183	4%

Table 5: Fairfax Athletic Club Demographics



Map 3: 20 minute drive time

Table 5, above shows the demographic characteristics of the 20 minute drive-time radius surrounding Fairfax Athletic Club as shown in the map below.

As expected, the market characteristics are very similar to that of the proposed Patrick Henry site.

Fairfax Athletic Center charges \$100/hour for field rentals on weekdays, \$135 on weekends and \$80/hour for the flex courts.

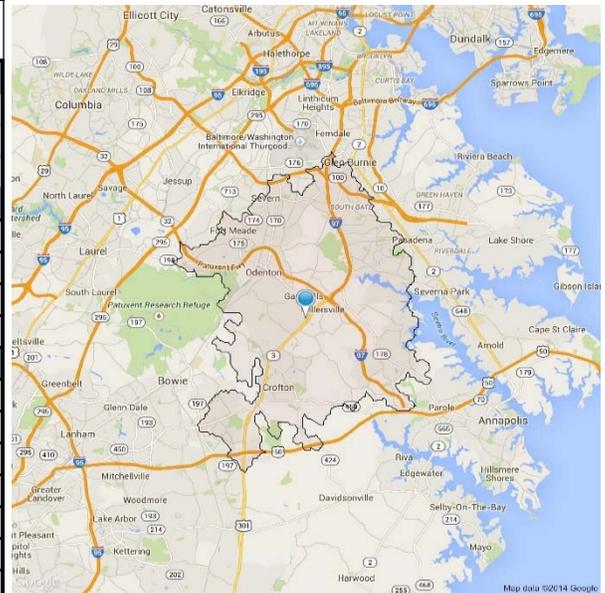
Ownership declined to disclose operating or revenue data for this facility.



A.P.I

A.P.I is a privately owned and operated sports complex located in Gambrills, Maryland roughly 40 miles from the site. The facility opened in 2011, and is home to over 10,000 athletes and families with over 250,000 visitors a year. The facility has both indoor (55,000 S.F) and outdoor (40,000 S.F) space 40,000 S.F of which are turf fields, and plays host to camps, clinics and lessons, leagues and tournaments, rentals, fields trips, and birthday parties. Table 6 shows the demographic characteristics of the 20 minute drive-time area surrounding A.P.I, as shown in the map below.

	Patrick Henry	API	
Total Population			
2010 Census	697,273	176,708	
2014 Estimate	749,133	190,143	
2019 Projection	816,037	168,774	
Age Distribution			
Age 19 Years or Less	22%	47218	25%
Age 20 to 39 Years	35%	47851	25%
Age 40 to 64 Years	32%	60411	32%
Age 65 Years or Over	11%	21230	11%
Household Income Distribution			
HH Income \$150,000 or More	27%	16860	26%
HH Income \$100,000 to \$149,999	20%	14196	22%
HH Income \$75,000 to \$99,999	14%	9,552	15%
HH Income \$50,000 to \$74,999	16%	10,414	16%
HH Income \$35,000 to \$49,999	8%	5,814	9%
HH Income \$25,000 to \$34,999	5%	3,570	5%
HH Income \$15,000 to \$24,999	5%	2,919	4%
HH Income \$10,000 to \$14,999	6%	2381	4%



Map 4: 20 minute drive time

Table 6: API Demographics

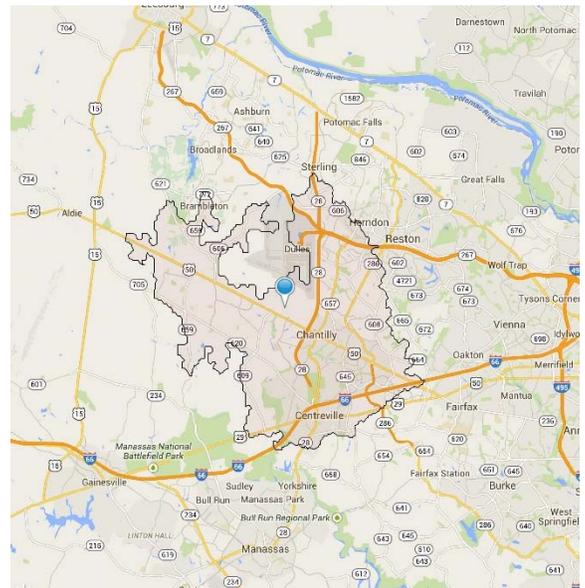


NOVA FIELD HOUSE

The NOVA Field House is a privately owned and operated sports complex located in Chantilly, Virginia roughly 27 miles and about 40 minutes from the site. The facility is privately run and utilizes advertising and marketing partnerships as one of its revenue generators. The facility features two of Northern Virginia’s largest indoor turf fields, as well as an NBA regulation sized basketball court

Table 7 below shows the demographic break down of the 20 minute drive time area surrounding NOVA, as shown in the map below. The market demographics surrounding this facility are similar to those surrounding the Patrick Henry site, with the exception of a notably higher percentage of persons aged 19 or younger.

	Patrick Henry	NOVA	
Total Population			
2010 Census	697,273	247,572	
2014 Estimate	749,133	267,307	
2019 Projection	816,037	232,521	
Age Distribution			
Age 19 Years or Less	22%	71,785	27%
Age 20 to 39 Years	35%	76,368	29%
Age 40 to 64 Years	32%	82,898	31%
Age 65 Years or Over	11%	16520	6%
Household Income Distribution			
HH Income \$150,000 or More	27%	32183	39%
HH Income \$100,000 to \$149,999	20%	18895	23%
HH Income \$75,000 to \$99,999	14%	10,168	12%
HH Income \$50,000 to \$74,999	16%	11,011	13%
HH Income \$35,000 to \$49,999	8%	4,982	6%
HH Income \$25,000 to \$34,999	5%	2,349	3%
HH Income \$15,000 to \$24,999	5%	1,995	2%
HH Income \$10,000 to \$14,999	6%	1176	1%



Map 5: 20 minute drive time

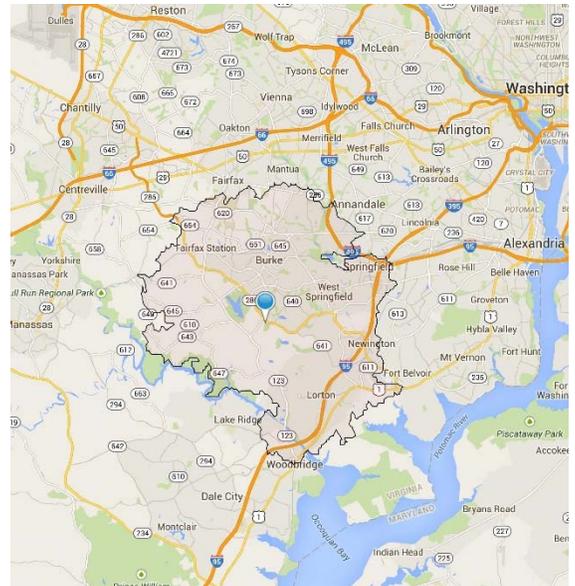
Table 7: API Demographics

NOVA field house charges \$140/hour for the field rental in the summer, \$195/hour during the winter and \$90/hour for the flex courts. B&D was not able to obtain operating or revenue data for this facility.



SOUTH RUN REC CENTER

The South Run Rec Center is owned and operated by Fairfax County and is located roughly 20 minutes southeast of the proposed site. The building was initially constructed as an equestrian center in 1988, but was repurposed as an indoor field house facility in 2005. Table 8 below shows the demographic break down of the 20 mile drive time area surrounding South Run RecCenter as shown in the map below. The distribution of incomes and ages is very similar to that of the area surrounding the proposed Patrick Henry site except for the notably higher percentage of persons aged 19 or younger.



Map 5: 20 minute drive time

	Patrick Henry	South Run	
Total Population			
2010 Census	697,273	265,263	
2014 Estimate	749,133	280,307	
2019 Projection	816,037	252,215	
Age Distribution			
Age 19 Years or Less	22%	72,045	26%
Age 20 to 39 Years	35%	61,260	22%
Age 40 to 64 Years	32%	98,065	35%
Age 65 Years or Over	11%	33,892	12%
Household Income Distribution			
HH Income \$150,000 or More	27%	33,402	38%
HH Income \$100,000 to \$149,999	20%	18,894	22%
HH Income \$75,000 to \$99,999	14%	10,720	12%
HH Income \$50,000 to \$74,999	16%	10,677	12%
HH Income \$35,000 to \$49,999	8%	5,668	7%
HH Income \$25,000 to \$34,999	5%	2,775	3%
HH Income \$15,000 to \$24,999	5%	2,498	3%
HH Income \$10,000 to \$14,999	6%	2,213	3%



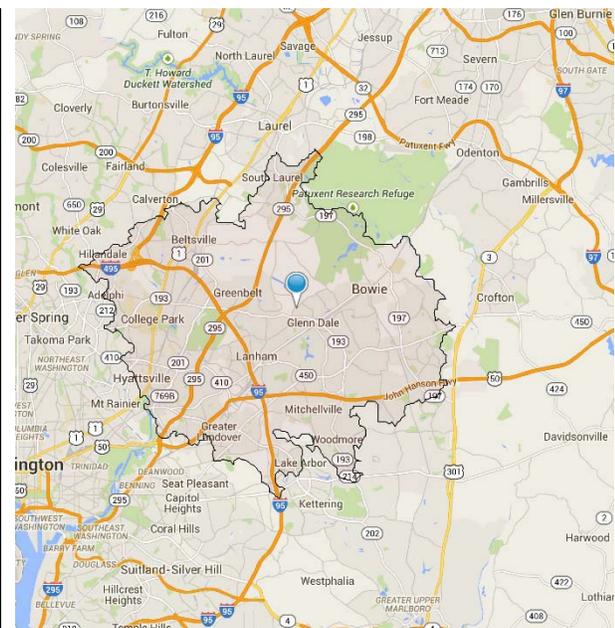
Table 8: South Run Demographics

B&D was informed that Fairfax park service charges rental rates of \$130/hour during the prime season and \$100/hour during the rest of the year ((Memorial Day-Labor Day). Rental revenue has remained consistent the past few years at about \$160,000/year, and is usually rented by soccer and lacrosse leagues. Fairfax County Park Authority operates the field house as part of the larger facility, so although staffing costs were not available, average yearly maintenance costs were reported to be approximately \$40-\$60K annually.

CAPITAL SPORTSPLEX

Capital Sportsplex is a privately owned and operated indoor facility located in Glen Dale, Maryland approximately 45 minutes to the north east of the proposed Patrick Henry site. The demographic characteristics indicated for the market area in the table below are significantly different from that of the Patrick Henry site. There is a significantly higher percentage of the population under 20 years of age and the income is more evenly distributed with a much larger percentage of the population earning less than \$75,000 annually. This likely means that this facility is more reliant on youth sports and its convenient access to major transportation routes to draw more regional participation. The facility offers a variety of youth and adult soccer and futsal leagues in addition to tournaments, classes, personal training, and facility rentals.

	Patrick Henry	Capital SportsPlex	
Total Population			
2010 Census	697,273	314,591	
2014 Estimate	749,133	322,707	
2019 Projection	816,037	329,533	
Age Distribution			
Age 19 Years or Less	22%	88976	28%
Age 20 to 39 Years	35%	99727	31%
Age 40 to 64 Years	32%	100604	31%
Age 65 Years or Over	11%	33398	10%
Household Income Distribution			
HH Income \$150,000 or More	27%	19293	18%
HH Income \$100,000 to \$149,999	20%	20056	19%
HH Income \$75,000 to \$99,999	14%	15810	15%
HH Income \$50,000 to \$74,999	16%	20652	19%
HH Income \$35,000 to \$49,999	8%	12361	12%
HH Income \$25,000 to \$34,999	5%	6437	6%
HH Income \$15,000 to \$24,999	5%	5372	5%
HH Income \$10,000 to \$14,999	6%	6747	6%



Map 6: 20 minute drive time

Table 9: South Run Demographics

Capital Sportsplex charges \$90/hour for full field rentals on weekdays before 4pm, \$115/hour on weekdays after 4pm and \$115/hour on weekends. Half field rates are \$65/hour when available. B&D was not able to obtain operating or revenue data for this facility.



PRELIMINARY MARKET ANALYSIS FINDINGS

- The 20-minute drive area surrounding the proposed Patrick Henry site has the appropriate characteristics to support the proposed facility type based upon national participation data, as well as the market characteristics of similar facilities evaluated in this study.
- The existence of two competitive facilities within the 20 minute drive area (the Fairfax Athletic Center and the Fairfax Sports Complex) will have an impact on the ability of the proposed site to draw participation from a significant portion of this geography.
- The average size of the case study sites was 46,000 GSF and all sites featured turf fields and basketball courts.
- Field houses are generally managed and/or owned by private organizations which could be indicative of market strength and/or the complexity of operating and programming this type of facility

PRELIMINARY PROGRAM RECOMMENDATIONS

B&D developed an outline program that reflects RPCA's vision for the facility along with the competitive context and market analysis findings. It is important to note that this preliminary recommendation is only based upon offerings of comparable facilities and has not been adjusted to reflect a detailed analysis of demand for programs in the market area. Table 10 below shows the list of all revenue-generating elements that are recommended for the field house, including recreation spaces, specialized activity spaces, and community spaces.

Program/Area (Sq.Ft.)	
<u>Turf Fields</u>	
Number of fields	2
Field Area (100 x 50)	5000
Total Field Area	10000
Stands	1000
Total	11000
<u>Flex Courts</u>	
Number Of Courts	1
Field Area (84 x 50)	4200
Total Field Area	4200
Stands	1000
Total	5200
<u>Running Track</u>	
Number of Lanes	4
Length of Lanes	400
Width of Lane	3.6
Total	5760
<u>Other</u>	
Office	500
Fitness Room	1000
Meeting/Party Room	500
Locker Rooms	2000
Total	4000
Total Program Area	25960
Circulation Etc.	20%
	5192
Total Field House Area	31,152

PARKING

RPCA requested that B&D evaluate parking requirements for facilities of this type. Based upon a review of zoning requirements in Alexandria City, the closest use type is either the Commercial Amusement Enterprise for indoor spaces or Institutional Community Buildings. Both of these use types have a requirement of one space per 200 SF. Based upon the initial program recommendation of 31,000 GSF, application of this parking standard will result in the need for approximately 155 spaces. Standard parking site analysis usually dictates allocation of approximately 150 square feet per parking space to account for drive aisles, lighting, and ingress/egress pathways. This preliminary analysis results in a parking requirement of approximately 23,000 square feet of space on site.

PROJECT ECONOMICS

Table 11 below indicates the key revenue drivers by sport and further more by playing surface.

Sports/Revenue Source	
<u>Turf</u>	<u>Court</u>
Soccer Rentals/Leagues Instructional Clinics & Camps Drop-in Play Events	Basketball Rentals/Leagues Instructional Clinics & Camps Drop-in Play Events
Lacrosse Rentals/Leagues Instructional Clinics & Camps Drop-in Play Events	Volleyball Rentals/Leagues Instructional Clinics & Camps Drop-in Play Events
Football Rentals/Leagues Instructional Clinics & Camps Drop-in Play Events	Futsal/Indoor Soccer Rentals/Leagues Instructional Clinics & Camps Drop-in Play Events
Other Sports and recreational Activities Rentals/Leagues Instructional Clinics & Camps Drop-in Play Events	Other Sports and recreational Activities Rentals/Leagues Instructional Clinics & Camps Drop-in Play Events
Running Track Rentals/Leagues Instructional Clinics & Camps Drop-in Play Events	

Table 11: Revenue Sources

Sports/Revenue Source	
<u>Turf</u>	<u>Court</u>
Soccer Rentals/Leagues Instructional Clinics & Camps Drop-in Play Events	Basketball Rentals/Leagues Instructional Clinics & Camps Drop-in Play Events

<p>Lacrosse Rentals/Leagues Instructional Clinics & Camps Drop-in Play Events</p>	<p>Volleyball Rentals/Leagues Instructional Clinics & Camps Drop-in Play Events</p>
<p>Football Rentals/Leagues Instructional Clinics & Camps Drop-in Play Events</p>	<p>Futsal/Indoor Soccer Rentals/Leagues Instructional Clinics & Camps Drop-in Play Events</p>
<p>Other Sports and recreational Activities Rentals/Leagues Instructional Clinics & Camps Drop-in Play Events</p>	<p>Other Sports and recreational Activities Rentals/Leagues Instructional Clinics & Camps Drop-in Play Events</p>
<p>Running Track Rentals/Leagues Instructional Clinics & Camps Drop-in Play Events</p>	

Because the majority of case study facilities evaluated are privately operated, operating revenue was not made available to our team. We suggest as a next step expanding our search regionally in order to identify a similar, publicly-operated facility from another market in order to find this information and to build a detailed revenue model and operating proforma to evaluate cost recovery characteristics for this type of facility.

Next Steps:

- It is recommended that additional conversations with planning and zoning officials be undertaken to account for the fact that this building will be co-located with school and that shared parking will likely result in a reduced need for dedicated parking associated with this facility.
- The market analysis findings reveal strong local demographic characteristics that are similar to those of other comparable facilities that are currently operating successfully. It is unknown at this time the extent of the impact on local demand that will result from the existence of two competing facilities in the 20-minute drive area. B&D recommends that interviews and focus group interviews be conducted with organizations and individuals who are most likely to be users of the facility in order to gain a better understanding of local market dynamics and demand for the preliminary program offerings listed herein.
- The distribution of programs and allocation of spaces should be driven by detailed market demand results and an evaluation of operating revenue potential. As mentioned above, we suggest as a next step expanding our search regionally in order to identify a similar, publicly operated facility from another market in order to find this information and to build a detailed revenue model and operating proforma to evaluate cost recovery characteristics for this type of facility. If we are unable to identify an acceptable facility, B&D recommends developing a revenue model and operating proforma based upon historical data our firm has compiled and in conjunction with B&D's Centers team (<http://www.centersusa.com/>) which operates recreation facilities nationwide.

APPENDIX

Total	Age									
	7-11	12-17	18-24	25-34	35-44	45-54	55-64	65-74	75+	
Base: Total U.S. (Age 7+)	285533	20426	25045	31318	42249	40483	44239	38569	23981	19221
	100.0	100.0	100.0	100.0	100.0	100.0	100.0	100.0	100.0	100.0
Basketball	25579	4037	5436	4635	4656	3615	2212	748	229	10
	9.0	19.8	21.7	14.8	11.0	8.9	5.0	1.9	1.0	0.1
	100.0	15.8	21.3	18.1	18.2	14.1	8.6	2.9	0.9	0.0
Football (Tackle)	7889	1500	3139	1428	879	539	195	208	--	--
	2.8	7.3	12.5	4.6	2.1	1.3	0.4	0.5	--	--
	100.0	19.0	39.8	18.1	11.1	6.8	2.5	2.6	--	--
Hockey (Ice)	2900	372	397	418	738	503	408	53	13	--
	1.0	1.8	1.6	1.3	1.7	1.2	0.9	0.1	0.1	--
	100.0	12.8	13.7	14.4	25.4	17.3	14.1	1.8	0.4	--
Lacrosse	2749	324	1179	409	528	235	42	21	10	--
	1.0	1.6	4.7	1.3	1.2	0.6	0.1	0.1	0.0	--
	100.0	11.8	42.9	14.9	19.2	8.6	1.5	0.8	0.4	--
Running/Jogging	40031	2364	5613	7923	8907	7318	4693	2006	788	418
	14.0	11.6	22.4	25.3	21.1	18.1	10.6	5.2	3.3	2.2
	100.0	5.9	14.0	19.8	22.3	18.3	11.7	5.0	2.0	1.0
Soccer	13690	4041	2878	1972	2210	1703	613	205	50	19
	4.8	19.8	11.5	6.3	5.2	4.2	1.4	0.5	0.2	0.1
	100.0	29.5	18.0	14.4	18.1	12.4	4.5	1.5	0.4	0.1
Volleyball	10250	1180	2554	1857	1958	1004	1044	521	81	50
	3.6	5.8	10.2	5.9	4.6	2.5	2.4	1.4	0.3	0.3
	100.0	11.5	24.9	18.1	19.1	9.8	10.2	5.1	0.8	0.5
Weight Lifting	31083	158	2580	5648	6030	5725	4909	3413	1743	878
	10.9	0.8	10.3	18.0	14.3	14.1	11.1	8.8	7.3	4.6
	100.0	0.5	8.3	18.2	19.4	18.4	15.8	11.0	5.6	2.8
Work Out At Club	35241	196	1628	5258	5802	5855	6125	4255	3750	2371
	12.3	1.0	6.5	16.8	13.7	14.5	13.8	11.0	15.6	12.3
	100.0	0.6	4.6	14.9	16.5	16.6	17.4	12.1	10.6	6.7

Table 2: NSGA national sports participation by age group

Total	Household Income								
	Under \$15,000	\$15,000-\$24,999	\$25,000-\$34,999	\$35,000-\$49,999	\$50,000-\$74,999	\$75,000-\$99,999	\$100,000-\$149,999	\$150,000+	
Base: Total U.S. (Age 7+)	285533	38098	32173	32165	40026	49902	32754	33831	26584
	100.0	100.0	100.0	100.0	100.0	100.0	100.0	100.0	100.0
	100.0	13.3	11.3	11.3	14.0	17.5	11.5	11.8	9.3
Basketball	25579	3652	2068	2218	3265	4316	3305	3564	3191
	9.0	9.6	6.4	6.9	8.2	8.6	10.1	10.5	12.0
	100.0	14.3	8.1	8.7	12.8	18.9	12.9	13.9	12.5
Football (Tackle)	7889	1019	706	1111	1545	1078	1131	887	411
	2.8	2.7	2.2	3.5	3.9	2.2	3.5	2.6	1.5
	100.0	12.9	8.9	14.1	19.6	13.7	14.3	11.2	5.2
Hockey (Ice)	2900	419	124	129	302	398	338	673	517
	1.0	1.1	0.4	0.4	0.8	0.8	1.0	2.0	1.9
	100.0	14.5	4.3	4.4	10.4	13.7	11.7	23.2	17.8
Lacrosse	2749	276	149	120	73	234	277	520	1101
	1.0	0.7	0.5	0.4	0.2	0.5	0.8	1.5	4.1
	100.0	10.1	5.4	4.4	2.6	8.5	10.1	18.9	40.0
Running/Jogging	40031	4136	2695	2824	4925	6604	5079	6665	7101
	14.0	10.9	8.4	8.8	12.3	13.2	15.5	19.7	26.7
	100.0	10.3	6.7	7.1	12.3	16.5	12.7	16.7	17.7
Soccer	13690	1791	647	1029	1669	1994	1441	2463	2655
	4.8	4.7	2.0	3.2	4.2	4.0	4.4	7.3	10.0
	100.0	13.1	4.7	7.5	12.2	14.6	10.5	18.0	19.4
Volleyball	10250	1515	974	896	1195	1596	1018	1524	1534
	3.6	4.0	3.0	2.8	3.0	3.2	3.1	4.5	5.8
	100.0	14.8	9.5	8.7	11.7	15.6	9.9	14.9	15.0
Weight Lifting	31083	2788	2283	2163	3748	5607	4165	5347	4982
	10.9	7.3	7.1	6.7	9.4	11.2	12.7	15.8	18.7
	100.0	9.0	7.3	7.0	12.1	18.0	13.4	17.2	16.0
Work Out At Club	35241	2419	2387	2528	4098	6408	5257	6340	5805
	12.3	6.3	7.4	7.9	10.2	12.8	16.0	18.7	21.8
	100.0	6.9	6.8	7.2	11.6	18.2	14.9	18.0	16.5

Table 3: NSGA national sports participation by income