



APPENDIX: Supporting Information Associated with the Feasibility Study of a Potential New Multi-Sport Complex in Batavia, New York

February 7, 2020



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1.

INTRODUCTION & BACKGROUND



1. INTRODUCTION: Project Background & Approach

- Conventions, Sports & Leisure International (CSL), with the participation of CHA Consulting, Inc. (CHA), was retained by the City of Batavia (City) to conduct a feasibility study of a potential new Multi-Sport Complex in Batavia.
- Local hockey organizations and economic development agencies have expressed interest in the development of a multi-sports complex to include two ice sheets, as well as an indoor multi-sport component for soccer, baseball, lacrosse and other sports. The complex could also include workout areas, office space and meeting areas and concession spaces.
- Project proponents believe that such a facility could allow for the attraction of new tournaments and better serve local indoor sports and recreation demand.
- The study process consisted of detailed research and analysis, including a comprehensive set of market-specific information derived from the following:
 - Experience garnered through more than 1,000 planning and benchmarking projects involving sports, recreation and event facilities throughout the country.
 - Local market visit at the outset of the project, including community and facility tours, and discussions with study stakeholders and community leaders.
 - In-person meetings, focus groups and interviews with potential user groups and sports clubs/organizations.
 - Telephone interviews with potential users (local and non-local).
 - Review of local market conditions and industry trends.
 - Competitive and comparable facility analysis.



1. INTRODUCTION: Project Background & Approach

The contracted study scope of work consists of the following research and analysis components:

PHASE ONE

1. Market Analysis
 - a) Kick-off visit, tours & meetings
 - b) Local market conditions
 - c) Local facility review
 - d) Regional competition
 - e) Comparable facilities
 - f) Industry trends
 - g) Stakeholder & user group interviews
 - h) Market demand conclusions
2. Program & Development Scenarios
3. Presentation of Draft Findings

PHASE TWO

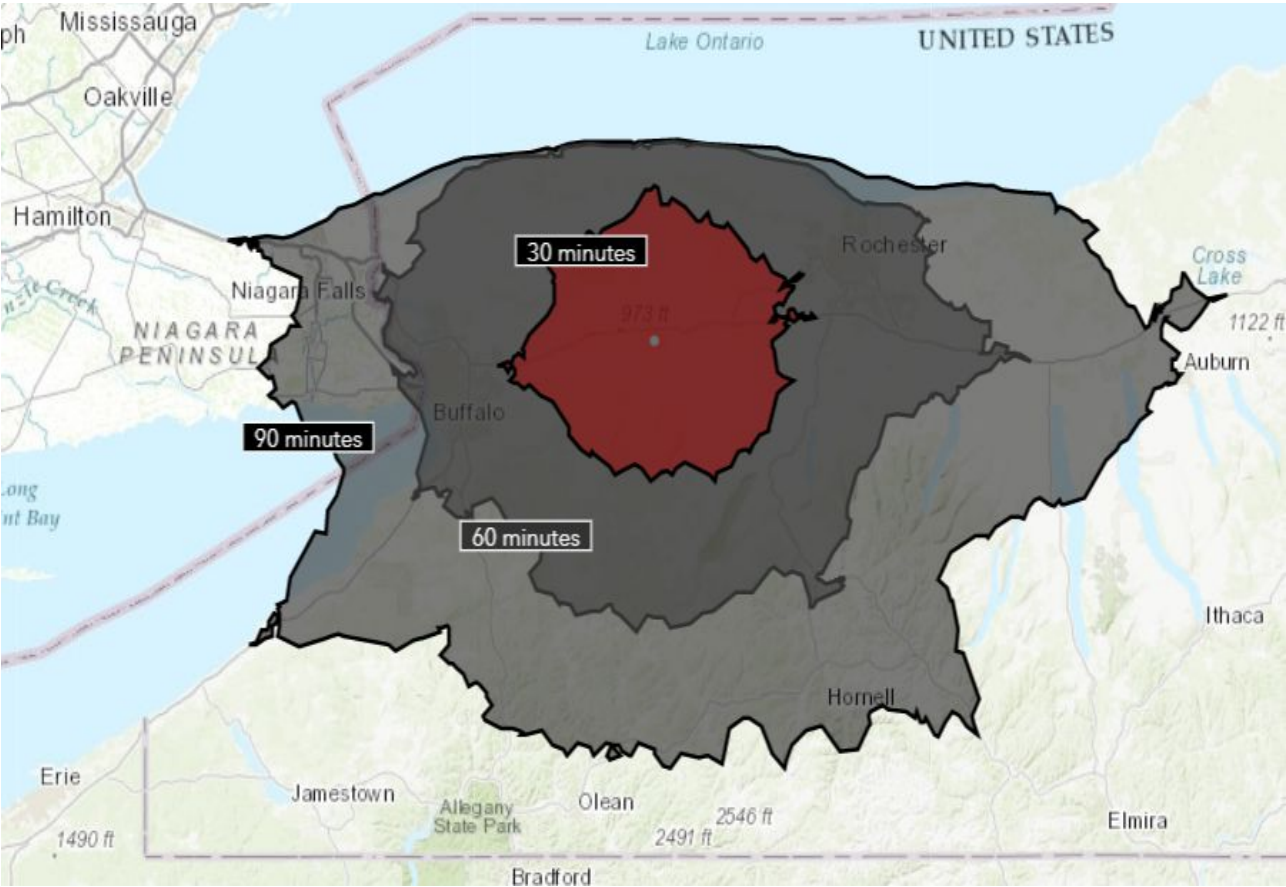
1. Program & Scenario Refinement
2. Conceptual Plan
3. Cost/Benefit Projections
 1. Preliminary Construction Costs
 2. Utilization & Attendance
 3. Financial Operating Analysis
 4. Economic Impact Analysis
4. Presentation of Draft Findings
5. Final Report & Presentations



2. LOCAL & REGIONAL CONDITIONS



2. LOCAL & REGIONAL: Location & Accessibility



Source: Esri, Google, 2019.

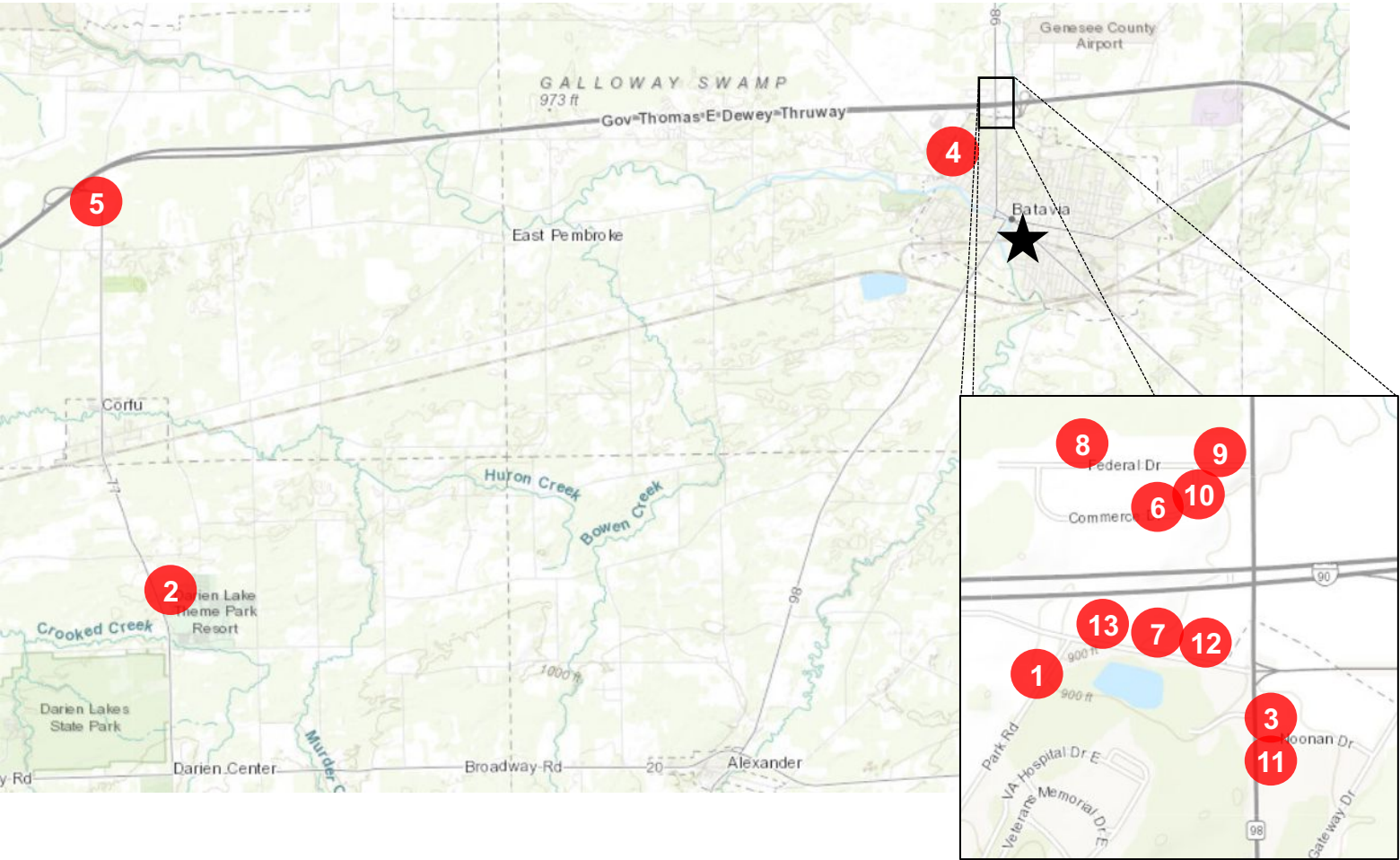
Market	Distance to Batavia, NY (in miles)	Drive Time	Market Population
Rochester, NY	33.9	0:38	1,078,879
Buffalo, NY	41.5	0:45	1,132,804
Niagara Falls, NY	52.9	0:58	1,132,804
Syracuse, NY	113	1:45	656,510
Ithaca, NY	116	2:03	104,871
Cleveland, OH	226	3:29	2,055,612
Pittsburgh, PA	251	3:48	2,342,299
Albany, NY	252	3:47	881,839
Philadelphia, PA	322	5:49	2,131,274
Burlington, VT	333	6:10	217,365
Springfield, MA	335	5:04	630,283
New York, NY	347	5:55	20,153,634
Hartford, CT	360	5:27	1,206,836
Columbus, OH	362	5:35	2,041,520
New Haven, CT	377	6:22	856,875
Providence, RI	412	6:22	1,614,750
Boston, MA	418	6:45	4,794,447
Manchester, NH	452	6:54	407,761

2. LOCAL & REGIONAL: Key Market Demographics

Demographic Variable	Batavia	Genesee County	30-minute	60-minute	90-minute	State of New York	U.S.
Population (2000)	16,256	60,370	122,002	2,038,892	2,482,334	18,976,457	281,421,906
Population (2010)	15,465	60,079	124,162	2,021,780	2,460,618	19,378,102	308,745,538
Population (2019 est.)	15,249	59,416	123,362	2,047,473	2,484,305	20,030,453	332,417,793
% Change (2000-2019)	-6.2%	-1.6%	1.1%	0.4%	0.1%	5.6%	18.1%
Population (2024 est.)	14,870	58,040	121,330	2,045,129	2,476,208	20,245,169	345,487,602
% Change (2019-2024)	-2.5%	-2.3%	-1.6%	-0.1%	-0.3%	1.1%	3.9%
Avg. Household Inc. (2019 est.)	\$61,858	\$72,323	\$ 73,786	\$ 77,362	\$ 76,178	\$ 99,113	\$ 87,398
Avg. Household Inc. (2024 est.)	\$68,246	\$80,758	\$ 83,100	\$ 87,651	\$ 86,324	\$ 112,713	\$ 99,638
% Change (2019-2024)	10.3%	11.7%	12.6%	13.3%	13.3%	13.7%	14.0%
Median Age (2019, in years)	41.0	43.0	42.7	41.2	41.6	39.2	38.5
Businesses (2019 est.)	716	2,080	3,833	68,768	82,433	725,854	12,112,147
Employees (2019 est.)	9,430	25,398	49,934	1,152,105	1,330,942	9,355,208	150,271,675
Employee/Residential Population Ratio	0.62:1	0.43:1	0.40:1	0.56:1	0.54:1	0.47:1	0.45:1

Source: Esri, 2019.

2. LOCAL & REGIONAL: Hotel Inventory



Key	Hotel Name	# of Rooms
1	Quality Inn & Suites Palm Island Indoor Waterpark	195
2	Six Flags Darien Lake's Lodge on the Lake Hotel	160
3	Days Inn by Wyndham Batavia - Darien Lake	103
4	Hotel at Batavia Downs	84
5	Darien Lakes Econolodge	73
6	Holiday Inn Express & Suites Batavia - Darien Lake	72
7	Red Roof Inn - Batavia	69
8	Fairfield Batavia ¹	62
9	Fairbridge Inn & Suites	60
10	Hampton Inn Batavia	59
11	Super 8 Batavia	54
12	LaQuinta Inn & Suites by Wyndham Batavia	51
13	Best Western Crown Inn & Suites	51

Approximate Total Room Count: 1,200

Note: Only properties with 50+ sleeping rooms were considered.
1) Fairfield Batavia opened in fall 2019.
Source: Visit Batavia CVB, 2019.

2. LOCAL & REGIONAL: Falleti Ice Arena



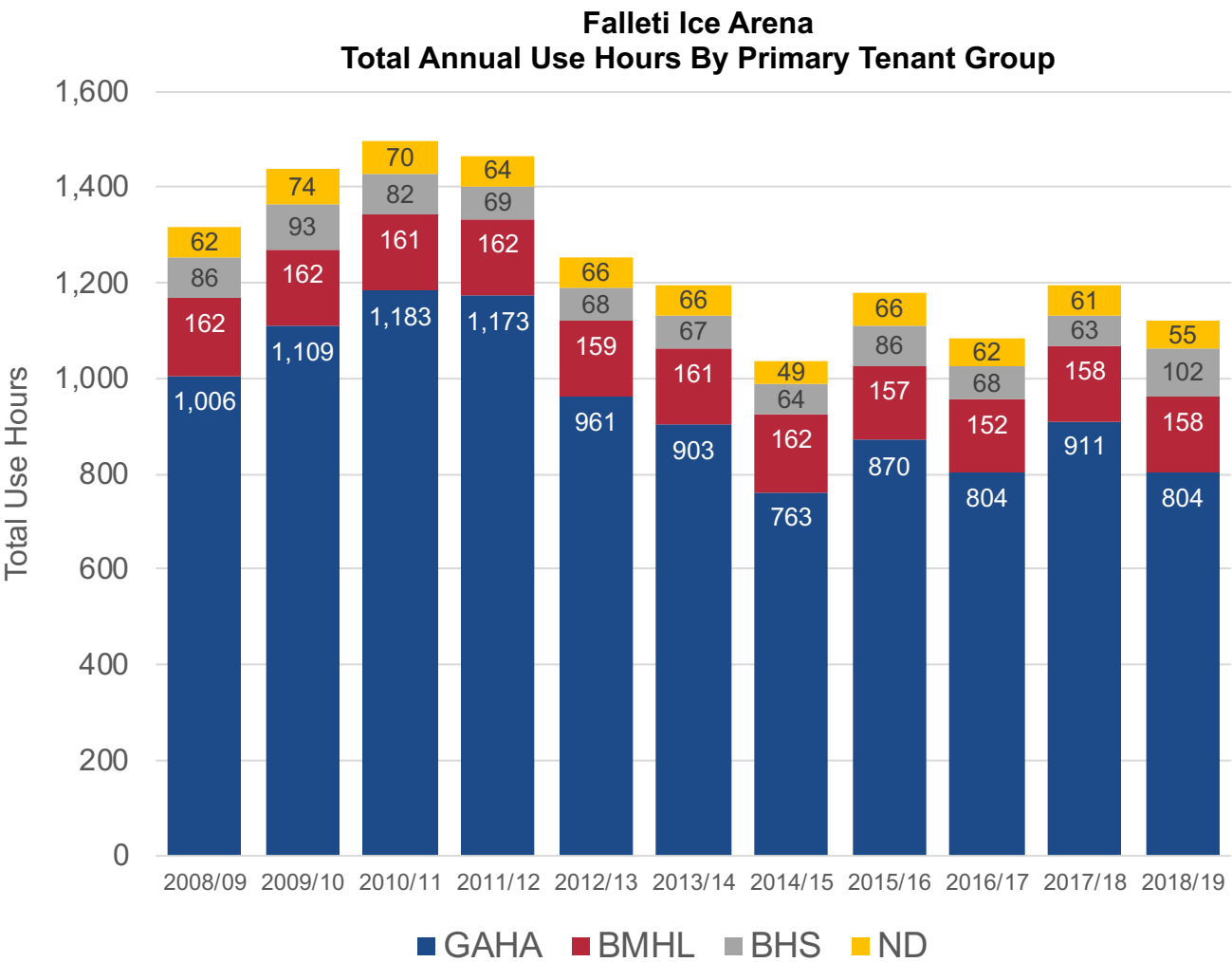
2. LOCAL & REGIONAL: Falleti Ice Arena (continued)

- Opened in 1978, Falleti Arena consists of a single sheet of ice (200' x 85') and a maximum seating capacity of 480 via wood bench seating on one side.
- Owned by City of Batavia, operated by Firland Management via lease agreement.
- Arena is located within walking distance of downtown Batavia.
- Primary Falleti Ice Arena tenants include:
 - Genesee Amateur Hockey Association (GAHA) Batavia Ramparts
 - Batavia Men's Hockey League (BMHL)
 - Batavia High School (BHS) Ice Devils
 - Batavia Notre Dame High School (ND) Fighting Irish
- The Arena's ice sheet is typically installed between September and March. During the off-season, the ice is removed and some dry surface activity is programmed, including in-line hockey, tradeshow and special events.
- There are an increasing number of repair, replacement and maintenance items that need to be addressed in the near to mid-term to sustain safe, operating conditions.
- The Arena lacks many of the amenities, seating and service/support areas that are present in modern facilities throughout the country.
- Firland Management has a lease agreement (ending March 2021) with the City to manage the day-to-day operations of the Arena.
- Falleti Arena has long-served as a productive community asset:
 - Estimated annual use hours = **1,600**
 - Estimated annual attendance = **68,500**
 - Estimated annual economic output (direct + indirect + induced spending) = **\$2.3 million**



2. LOCAL & REGIONAL: Falleti Ice Arena (continued)

- Over the past 10 years, total use hours provided by the four primary tenant groups has been trending down since 2010/11. GAHA represents the largest user group in terms of annual use hours, which approximated 800 in 2018/2019.
- Overall, the four primary user groups contribute approximate 1,100 use hours annually. Other rentals (not including open skating) are estimated to contribute an additional 500 use hours.
- During the five months in which the ice is out, programming and rentals for activities such as in-line skating games/training and special events have been declining in recent years.
- Compared to industry averages (on a per ice sheet basis), Falleti Arena utilization ranks:
 - Lower in number of months per year with ice in (7 vs. 10 average)
 - Lower in number of primary tenants (4 vs. 6 average)
 - Lower in terms of tenant use hours (1,100 vs. 2,000 average)
 - Lower in terms of total use hours (1,600 vs. 3,000 average)



Source: Firland Management, 2019.

2. LOCAL & REGIONAL: Competitive Ice Complexes

Key	Facility	Location	# of Rinks
1	Holiday Rinks	Cheektowaga, NY	2
2	Cornerstone Arena	Lockport, NY	2
3	Bill Gray's Regional Iceplex	Rochester, NY	4
4	Northtown Center at Amherst	Williamsville, NY	4
5	Dann Memorial Rink	Buffalo, NY	2
6	Lakeshore Hockey Arena	Rochester, NY	2
7	HARBORCENTER	Buffalo, NY	2
8	Leisure Rinks	West Seneca, NY	2
9	Robert & Concetta Dwyer Arena - Niagara University	Lewiston, NY	2
10	Allyn & Duke Schneider Ice Arenas at the YMCA	Skaneateles, NY	2
11	Cicero Twin Rinks	Cicero, NY	2



Source: Facility management, 2019.

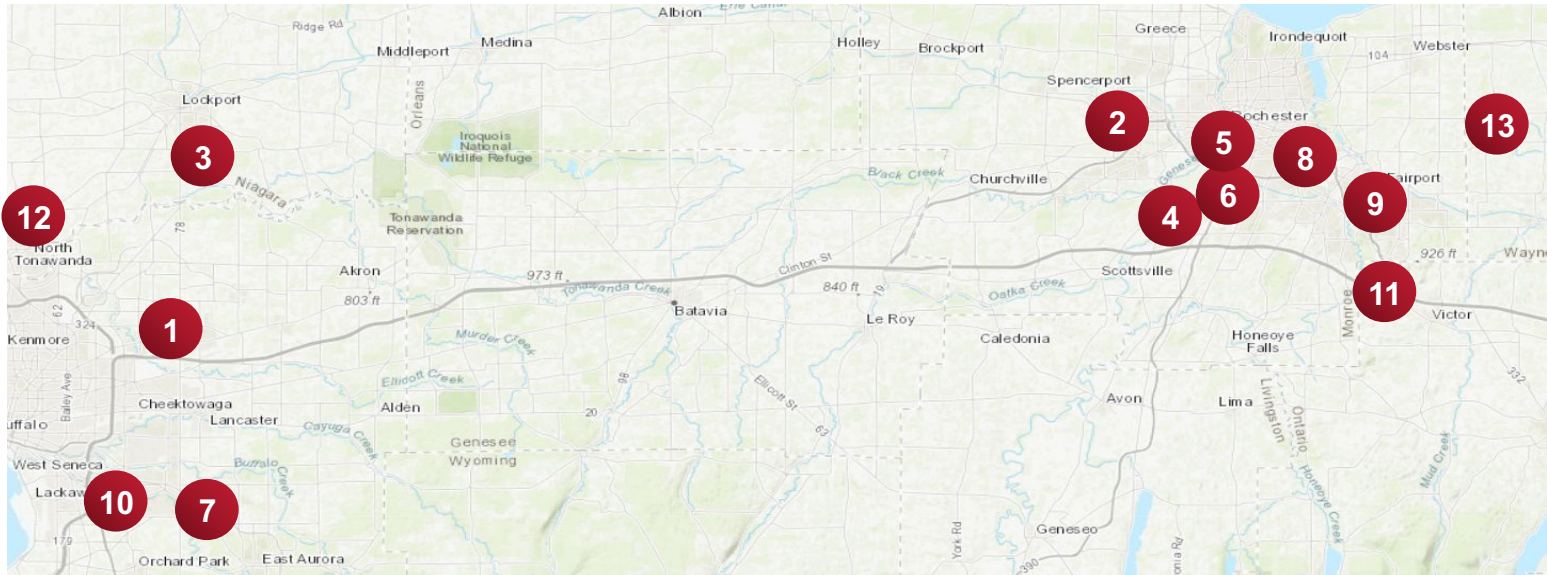
2. LOCAL & REGIONAL: Competitive Ice Complexes

Key	Facility	Location	# of Rinks	Type	Distance from Falleti Ice Arena (in miles)
1	Holiday Rinks	Cheektowaga, NY	2	Both NHL	30.2
2	Cornerstone Arena	Lockport, NY	2	Both NHL	30.9
3	Bill Gray's Regional Iceplex	Rochester, NY	4	All NHL	35.0
4	Northtown Center at Amherst	Williamsville, NY	4	3 NHL, 1 Olympic	37.0
5	Dann Memorial Rink	Buffalo, NY	2	1 NHL, 3/4 rink	39.8
6	Lakeshore Hockey Arena	Rochester, NY	2	Both NHL	40.1
7	HARBORCENTER	Buffalo, NY	2	Both NHL	42.8
8	Leisure Rinks	West Seneca, NY	2	Both NHL	44.4
9	Robert & Concetta Dwyer Arena - Niagara University	Lewiston, NY	2	Both NHL	55.5
10	Allyn & Duke Schneider Ice Arenas at the YMCA	Skaneateles, NY	2	Both NHL	96.2
11	Cicero Twin Rinks	Cicero, NY	2	1 NHL, 1 Olympic	118.0

Source: Facility management, Google, 2019.

2. LOCAL & REGIONAL: Competitive Indoor Sports Complexes

Key	Facility	Location	Basketball Courts	Volleyball Courts	Indoor Turf Fields
1	Epic Sports & Fun Center	Buffalo, NY	0	0	3
2	Total Sports Experience - Gates	Rochester, NY	1	0	5
3	Lockport Sports Complex	Lockport, NY	1	2	0
4	Empire United Soccer Center	West Henrietta, NY	0	0	3
5	River Campus Sports Complex	Rochester, NY	0.5	0.5	1
6	Rochester Sports Garden	Rochester, NY	2	0	2
7	Sahlen Sports Park	Elma, NY	0	0	4
8	Midtown Athletic Club	Rochester, NY	1	0	1
9	Total Sports Experience - E. Rochester	East Rochester, NY	0	0	2
10	Buffalo Niagara Court Center	Buffalo, NY	0	6	0
11	Pinnacle Sports	Victor, NY	2	2	1
12	Sportsplex	North Tonawanda, NY	0	0	2
13	Tri-County Sports Complex	Macedon, NY	2	2	2



Source: Facility management, 2019.

2. LOCAL & REGIONAL: Competitive Indoor Sports Complexes

Key	Facility	Location	Basketball Courts	Volleyball Courts	Indoor Turf Fields	Type of Turf Fields	Distance from Falleti Ice Arena (in miles)
1	Epic Sports & Fun Center	Buffalo, NY	0	0	3	(1) 40x75yd; (1) 85x185ft; (1) baseball/softball	26.8
2	Total Sports Experience	Rochester, NY	1	0	5	(2) 28x62yd; (1) 50x80yds; (1) 25x25yd; (1) 50x70yd	29.1
3	Lockport Sports Complex	Lockport, NY	1	2	0	(1) basketball court; (2) volleyball courts; can also be used for rectangle sports	31.4
4	Empire United Soccer Center	West Henrietta, NY	0	0	3	(1) 100x50yd, can be split into (3) 50x30yd fields	31.6
5	River Campus Sports Complex	Rochester, NY	0.5	0.5	1	(1) basketball/volleyball court; (1) regulation turf field	32.5
6	Rochester Sports Garden	Rochester, NY	2	0	2	2 hardwood basketball; (1) 30x60yd; (1) 72x172ft	33.8
7	Sahlen Sports Park	Elma, NY	0	0	4	(1) 70x110yd; (1) 42x82yd; (1) 35x96yd; (1) 21x42yd	33.9
8	Midtown Athletic Club	Rochester, NY	1	0	1	(1) basketball court; (1) non-regulation turf field	37.4
9	Total Sports Experience	East Rochester, NY	0	0	2	(1) 85x167ft; (1) 85x128ft	40.8
10	Buffalo Niagara Court Center	Buffalo, NY	0	6	0	(6) indoor volleyball courts; (4) sand outdoor courts	42.8
11	Pinnacle Sports	Victor, NY	2	2	1	(2) basketball courts; (2) volleyball courts; (1) regulation turf field	43.1
12	Sportsplex	N. Tonawanda, NY	0	0	2	(1) 70x25yd; (1) 25x35yd	43.4
13	Tri-County Sports Complex	Macedon, NY	2	2	2	(4) basketball/volleyball courts; (2) boxed regulation turf fields	48.6

Source: Facility management, Google, 2019.

3.

COMPARABLE FACILITIES



3. COMPARABLE FACILITIES: Case Studies



FACILITY: Community First Champion Center Fox Cities
City, State: Grand Chute, Wisconsin
Owner: Grand Chute Development Authority
Operator: SFM
Key Facility Components:
 Pod 1 – four basketball/eight volleyball courts
 Pod 2 – one ice rink
 Pod 3 – one ice rink; convertible to four basketball/eight volleyball courts

Development: Official ground-breaking occurred in July of 2018 and the construction is expected to be completed in Falls of 2019 at a total cost of \$30.6 million.

Tenants: The new facility is expected to take on the majority of the ice activity in the Appleton area, but no official tenants have been named.

Other:

- The cost estimate for the facility is \$30.6 million of which \$29.2 million is allotted for construction and \$1.4 million for furniture, fixtures, and equipment. It will be financed by municipal lease revenue bonds at a fixed interest rate and a motel and hotel room tax.
- The land for the development was donated by the City of Grand Chute and has an estimated value of \$1 million.
- The Champion Center is projected to generate \$8.9 million in direct spending during the first year of operations and \$12 million by the fifth year of operations.
- The facility will offer flexible space with one of the three pods being able to convert between an ice rink and sport court depending on the season and demand for the space.
- In May 2019, the naming rights to the facility were sold to Community First Credit Union.

3. COMPARABLE FACILITIES: Case Studies



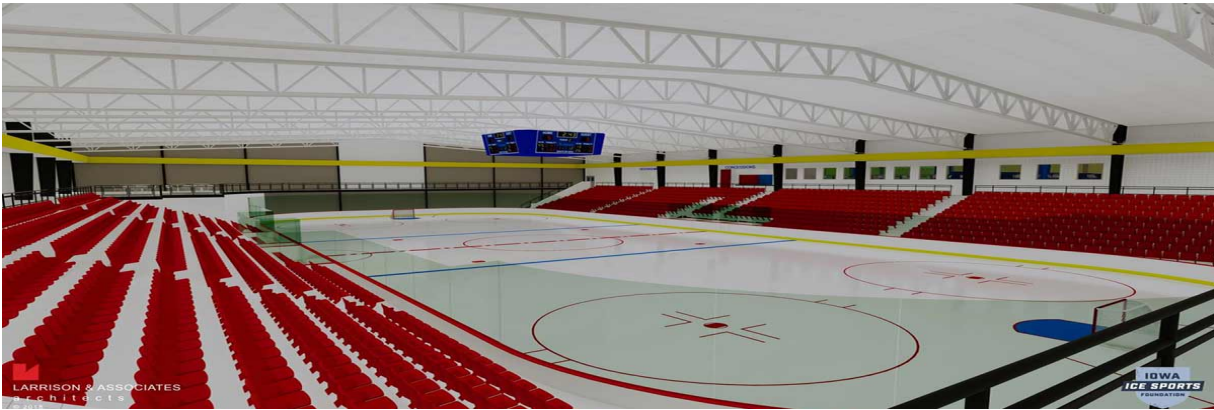
FACILITY:	Seven Bridges Ice Arena
City, State:	Woodridge, Illinois
Owner:	Black Bear Sports Group
Operator:	Black Bear Sports Group
Key Facility Components:	One NHL sized ice rink with 1,500 seats One Olympic sized ice rink with 700 seats 13,760 sf turf space Blue Line Bar & Grill, Ice Café, Skate Sharpening Shack 350 parking spots
Development:	Opened in 1994 at a total cost of approximately \$10.0 million
Tenants:	Team Illinois, Benet Academy Hockey Club, Bridgedale Academy Hockey, Naperville North Hockey, Huskies Hockey Club, CMSA Soccer, Windy City Curling Club, 200x85 hockey development company
Other:	In 2011 the Chicago Mission AAA hockey club purchased the arena for \$13.5 million borrowing a total of \$13.7 million for the acquisition renovation of the facility. In 2015, the borrower filed a foreclosure suite alleging the Mission failed to repay \$8.9 million in debt that had matured the previous fall. An east coast based private equity firm, Black Bear Sports Group, bought the debt on the facility and seized the property through a foreclosure sale in 2016. The mission of the firm is to purchase undermanaged and underperforming facilities to better manage and provide capital to provide for the local community. It is estimated that the annual foot traffic of the Arena is 1.1 million people.

3. COMPARABLE FACILITIES: Case Studies



FACILITY:	Cape Sportsplex
City, State:	Cape Girardeau, Missouri
Owner:	City of Cape Girardeau
Operator:	City of Cape Girardeau Parks and Recreation Department
Key Facility Components:	6 full-size basketball courts that convert to 12 full-size volleyball courts 2 indoor turf soccer fields Four batting cages that come down on one of the turf fields Concession area 3 meeting rooms spaces Open space throughout the facility for teams to meet during tournaments
Development:	The Cape Sportsplex opened in May 2017 for \$12.5 million. The City of Cape Girardeau funded the entire project with a restaurant tax that continues to help with operations that were handed to the parks and recreation department.
Event Activity:	The facility brings in a little bit of everything, but the majority of tournaments and practices are for volleyball and basketball. Outside or recreational programming hours, local clubs, organizations, and associations utilize the facility on a regular basis throughout the week.
Other:	Facility management noted that building in flexibility as part of the facility is the key to its early successes. Having basketball hoops, batting cages, and other sports equipment seamlessly come down from the ceiling ensures quick set-up and take down of events allowing management to book more events.

3. COMPARABLE FACILITIES: Case Studies



FACILITY: MidAmerican Energy Company RecPlex

City, State: West Des Moines, Iowa

Owner: City of West Des Moines

Operator: TBD

Key Facility Components:
2 ice rinks
3 indoor turf soccer fields
3 full-size basketball courts, 6 full-size volleyball courts
5 outdoor soccer fields
3,000 sf of meeting space and 20,000 sf of exhibit space
3,000-seat arena with a stage

Development: The \$30 million facility was first proposed in 2017 by the Iowa Soccer Association and the Iowa Ice Sports Foundation as a way to meet the growing demand for indoor youth and adult sports.

The MidAmerican Energy Company donated \$5 million to the project, and the city granted them naming rights on the complex in October 2018.

Excavation of the proposed site started in fall 2018. The tentative opening date is set for the summer of 2020.

A mix of public and private money will be used to fund the facility. So far, \$10 million in individual and corporate donations, a potential \$1.5 million in grant funding, and \$18.5 million in West Des Moines hotel/motel tax revenue has been set aside for the project. The hotel/motel tax is a seven percent tax charged to hotel guests throughout West Des Moines.

The MidAmerican Energy Company RecPlex will be located on 60 acres of farmland south of Grand Avenue and east of Jordan Creek Parkway in West Des Moines.

3. COMPARABLE FACILITIES: Case Studies



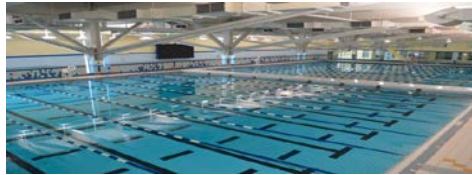
FACILITY: The River's Edge
City, State: Davenport, Iowa
Owner: City of Davenport
Operator: City of Davenport Parks and Recreation Department
Key Facility Components: 1 Olympic-sized indoor hockey rink
1 indoor turf field
Development: Opened in 1994 as a non-profit facility, the city acquired the River's Edge in 2010 and paid the remaining balance on its outstanding loans for approximately \$2 million.
Tenants: Quad Cities Hockey Association
Services all the municipalities in the surrounding communities, including cities in Illinois
Other: Originally, there were two ice rinks at The River's Edge until one was converted into a turf field. The conversion to the turf field was more profitable for the facility than having two sheets of ice, so the turf was kept permanently.

The River's Edge is run as an enterprise fund with no subsidy from the city. Facility management's main goal is to breakeven each year, with infrastructure repairs causing any losses over the years.

3. COMPARABLE FACILITIES: Case Studies



FACILITY:	Chelsea Piers Connecticut
City, State:	Stamford, Connecticut
Owner:	Chelsea Piers
Operator:	Chelsea Piers
Key Facility Components:	Olympic-size, 50-meter Indoor pool with moveable bulkhead 2 indoor basketball courts/4 volleyball courts 2 NHL-sized ice rinks 100-yard indoor turf field (divisible into 4 large fields) 1/5-mile indoor track 5 batting cages 7 indoor tennis courts 12 squash courts 15,000 square foot gymnastics training space “The Loft” event space (3,500 square feet)
Development:	Expansion of the Chelsea Piers sports complex in Manhattan, opened in July 2012. The project cost \$50 million. NBC Sports Group leased 270,000 square feet adjacent to Chelsea Piers as part of their \$100 million headquarters/studios relocation project.
Tenants:	Chelsea Piers Aquatic Club Full Throttle Triathlon Team Chelsea Piers Athletic Club BlueStreak Sports Training



3. COMPARABLE FACILITIES: Case Studies



FACILITY:	Summit Sports and Ice Complex
City, State:	Lansing, Michigan
Owner:	Aim High Sports
Operator:	Aim High Sports
Key Facility Components:	<ul style="list-style-type: none">• 2-rink ice complex – 1 Olympic-sized, 1 NHL-sized rink• 55,000 square foot Basketball facility with 5 basketball courts/6 volleyball courts with bleacher seating for 100 per court• 54,300 square foot fieldhouse with roll-up turf surface above concrete floor• 4 meeting rooms• Sports performance center• Gymnastics center• Event promoter office space
Development:	
Tenants:	<p>Aim High Sports Gymnastics tenant Hockey clubs Basketball club teams</p>
Other:	<p>Peak usage occurs during the months of December through March, and 3pm to midnight on weekdays. Private owner has a liquor license for the facilities, hosts a number of special events like banquets and expos. The CVB has a sponsorship of the venue and the management team works with the CVB to bid on events</p>

3. COMPARABLE FACILITIES: Case Studies



FACILITY:	Salina Fieldhouse
City, State:	Salina, Kansas
Owner:	Salina Parks and Recreation Department
Operator:	Salina Parks and Recreation Department
Key Facility Components:	68,500 square foot facility 6 full-size basketball courts that can be converted into 8 volleyball courts 1 indoor turf field
Development:	The Salina Fieldhouse was recently opened in July of 2017 for a total of \$11.8 million.
Tenants:	Parks and Recreation programming Clubs, teams, and organizations
Other:	Three of the basketball courts can be converted over to turf to make up the full-size indoor turf field.

3. COMPARABLE FACILITIES: Case Studies



FACILITY: Peaks Ice Arena

City, State: Provo, Utah

Owner: City of Provo

Operator: City of Provo

Key Facility Components: 2 Olympic-grade ice sheets
2 indoor turf fields
12 locker rooms

Development: After Salt Lake City, Utah successfully captured the bid for the 2002 Winter Olympics, it was decided that Provo would be home to a two-sheet Olympic practice facility. Construction on the Peaks Ice Arena began on September 17th, 1997 and the facility was opened on November 20th 1998. The total cost of construction was \$12.4 million, and the City of Provo, Utah County, Salt Lake City Olympic Committee, and the owners of Provo's private Seven Peaks Waterpark split the final cost.

Tenants: Brigham Young University Cougars men's ice hockey team
Peaks Youth Hockey Association
Peaks Figure Skating Club
Learn-to-Skate USA program

Other: This is the first year the facility will be operating without a general fund subsidy from the City of Provo.

The ice sheets are in constant use from 6am to midnight during the winter months. The turf fields have served as a big revenue for the facility all throughout the year.

3. COMPARABLE FACILITIES: Case Studies



FACILITY:	Fieldhouse USA - Frisco
City, State:	Frisco, Texas
Owner:	City of Frisco
Operator:	Fieldhouse USA (FHUSA)
Key Facility Components:	<ul style="list-style-type: none">• 144,600 square foot facility opened in March 2009• Part of the over \$100 million, 62 acre complex Sports Village USA• 12 Full-size hardwood basketball and volleyball courts• Indoor Turf Field• Fitness Center• 10,000sf Athletes' Performance training center• 13,200sf of retail space, food and beverage, court and several rooms
Development:	P3 project for which the City issued bonds to fund construction of the \$17.5 million facility. FHUSA operates via a long-term lease with the City; initial lease term of 22 years plus two 10-year extensions. \$12.5 million funded by the City of Frisco allocated towards construction costs. Remaining \$5 million came from the 14 acres of land and investments donated by Sports Village Holdings, LLC.
Tenants:	EXOS, Baylor Urgent Care, Frisco Soccer Association, NTA Taekwondo, Tumble and Stunt
Financial Ops:	Annual Revenue before City lease payment (2017): \$3.8 million Annual Expenses before City lease payment (2017): \$2.0 million Total operating profit before City lease payment (2017): \$1.8 million
Annual Events:	Volleyball: Host approximately five annual tournaments with an average of 100 teams and 1,200 spectators. Basketball: Host approximately 25 tournaments annually with an average of 80 teams and 1,000 spectators Rental Rates: \$60 per court/hour for both volleyball and basketball, \$150 per Turf court/hour

3. COMPARABLE FACILITIES: Case Studies



FACILITY: Hammond Sportsplex
City, State: Hammond, Indiana
Owner: City of Hammond
Operator: City of Hammond
Key Facility Components: 2 indoor regulation-sized turf soccer fields
6 basketball courts that can be converted to 10 volleyball courts
6 batting cages



Development: The Hammond Sportsplex officially opened in September 2018 with a community ribbon-cutting ceremony. The 135,000-square foot facility boasts two regulation-size indoor turf soccer fields that can be utilized as a full-size baseball/softball field, six basketball courts that can be converted into ten volleyball courts, six batting cages, an upper level quarter-mile track open free to the community, a community room, concessions, and restrooms and changing rooms.

The \$17 million facility was constructed by Madison Construction in partnership with the City of Hammond. The Sportsplex sits on the old site of the Woodmar Mall on Indianapolis Boulevard; centrally located in Hammond, yet easily accessible for traveling teams and non-local guests.

The facility was funded by a \$9 million loan from the U.S. Department of Housing and Urban Development in conjunction with a tax-increment financing district (TIF) that covered the additional \$8 million needed.

Tenants: Kennedy Avenue Chiropractic
Velocity 219 Volleyball Club
Various youth volleyball and basketball leagues and camps

3. COMPARABLE FACILITIES: Case Studies



FACILITY: Empire United Soccer Center

City, State: West Henrietta, New York

Owner: Empire United Soccer Academy

Operator: Empire United Soccer Academy

Key Facility Components: Indoor Field House: (1) 100yd by 50yd turf field that can be split into three smaller 50yd by 30yd fields
Conference room, team locker room and showers
Outdoor Turf Field: (1) 120yd by 75 yd turf field, fully lit, that can be split into two smaller 75yd by 47yd

Development: The Empire United Soccer Academy Club was founded in 2007 when the Rochester Junior Rhinos, the Syracuse Football Club and the Buffalo United Soccer Club joined forces. The club has three levels within it: Zone 1 for players aged seven to twelve; Zone 2 for players aged thirteen to eighteen focusing on regional play; and the Development Academy for ages fourteen to nineteen and players looking to compete at the highest level. Player tuition covers all actual costs to run the program with a net zero revenue each year. The club works in conjunction with the U.S. Soccer Development Academy for a few of its teams to bring more competitive programming to the Western New York region. Empire Academy involves 150 teams. Four tournaments are hosted in May.

The Empire United Soccer Center was developed as a home field facility for the club. The club is a registered not-for-profit organization (501c3) that fully owns and operates the soccer center which includes one large turf field measuring 100 yards by 50 yards. The indoor field can be split into three smaller fields measuring 50 yards by 30 yards each. The facility is home to various tournaments held by the Empire United Soccer Academy club including the Empire Cup and College Showcase.

3. COMPARABLE FACILITIES: Case Studies



FACILITY:	Bill Gray's Regional Iceplex
City, State:	Rochester, New York
Owner:	End 2 End
Operator:	End 2 End
Key Facility Components:	4 NHL-sized ice sheets Feature rink: Lattimore Arena w/ 3,000 seats Pro shop, physical therapy, fitness center, concessions
Development:	<p>The Bill Gray's Regional Iceplex is centrally located on the Monroe Community College campus in Rochester. The facility is 186,000 square feet, boasting four NHL-sized ice sheets with onsite physical therapy, a pro shop, locker rooms, a fitness center, and a multitude of concessions. The AHL team, the Rochester Americans (Amerks), have a programming partnership with the facility to put on youth camps and clinics. In 2017, the facility underwent an expansion, adding the fitness center and energy efficiency improvements for \$2.2 million.</p> <p>The tournaments and competitions the Iceplex hosts have generated 86,000 out of town visitors, staying in 35,200 hotel rooms and generating \$18.5 million in direct out of town spending to the Rochester area per year, according to a recent study done by Camoin Associates. The facility experiences over 1.7 million visitors each year.</p>
Tenants:	Rochester Americans (AHL) Youth Programming Partnership Lattimore Physical Therapy Legacy Global Sports Event Management Parisi Speed School Cosmic Hockey Iceplex Fitness Rochester Box Lacrosse League Visit Rochester Tourism Center

3. COMPARABLE FACILITIES: Case Studies



FACILITY:	Total Sports Experience
City, State:	Rochester & East Rochester, NY
Owner:	Rochester Regional Health
Operator:	Rochester Regional Health
Key Facility Components:	<p>2 ‘sister’ facilities: the Gates Facility & the East Rochester Facility</p> <p>Gates Facility (127,500SF): 5 indoor fields in total, 2 boarded; 1 basketball court; 14 fields outside w/ pavilions <i>Indoor Field Dimensions: 2 boarded fields = 85’ x 185’, other 3 fields = 50yd x 80yd; 25yd x 25yd; 50yd x 75yd</i></p> <p>East Rochester Facility (49,700SF): 2 fields, 1 boarded <i>Indoor Field Dimensions: Boarded field = 85’ x 167’, other field = 85’ x 127’</i></p>
Development:	<p>The Gates Facility was opened in 2001 on the west side of Rochester by the Rochester Regional Health System. Completely privately funded, the facility cost between \$2.5 and 3.0 million. Due to programming needs on the east of the city, Rochester Regional Health opened another facility in 2013 for just around a \$1 million. Both facilities run various camps, clinics, and leagues throughout the year, as well as host club teams’ practices. Facility management reports that business is evenly split between leagues and club teams. The Total Sports Experience facilities primarily host soccer and lacrosse events, but occasionally have softball and baseball programs. Even with the fourteen outdoor fields, business is very seasonal with November through March reported as the busiest months.</p>
Tenants:	<p>Gates Facility: Agape Physical Therapy, Everage World Championship Karate, and Power Train Sports Institute</p> <p>East Rochester Facility: Power Train Sports Institute and Power Train Fitness</p>

3. COMPARABLE FACILITIES: Case Studies



FACILITY: Holiday & Leisure Rinks

City, State: Cheektowaga & West Seneca, NY

Owner: Private

Operator: Private

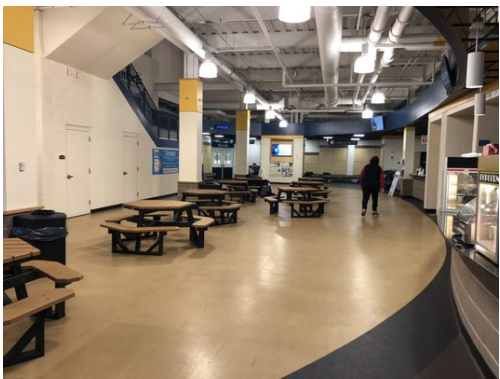
Key Facility Components: 2 ‘sister’ facilities:
Holiday Rinks (2 NHL-sized ice sheets)
Leisure Rinks (2 NHL-sized ice sheets)

Development: The Holiday & Leisure Rinks, both located just outside Buffalo, are home to Western New York State hockey history, including many ties with the Buffalo Sabres. Originally built in 1973, the Leisure twin rinks is the only facility since then to have continually operated since its inception. The Holiday twin rinks were constructed in 1971, but filed for bankruptcy in 1974, merging with the Leisure brand to continue operations. The Holiday rinks served as the original practice facility for the Buffalo Sabres.

The facilities gained a reputation throughout the years as the “Big Game” rinks, hosting many competitive clubs, league play, and major regional tournaments. Some of the larger tournaments hosted include the historic Pepsi Tournament which has been running every year since 1973, the AAU WNY Invitational, and the Little NHL Half Ice tournament. Many NHL players have trained and come up through the programs held at the Holiday and Leisure Rinks, making the facilities highly desirable throughout the region. Multiple renovations throughout the years have kept the rinks competitive with new developments.

Tenants: Skate Great, Inc. Southtown Stars
Buffalo Regals Bardown High School Stars Summer League
Buffalo Stars

3. COMPARABLE FACILITIES: Case Studies



FACILITY:	Cornerstone Arena	
City, State:	Lockport, NY	
Owner:	Private Non-Profit 501(c)(3)	
Operator:	Firland Management	
Key Facility Components:	93,500 square feet, 2 NHL-sized rinks, spectator seating for 630, Performance training center, community room/meeting space.	
Development:	<p>The \$15 million arena complex was constructed with funding from a bank mortgage and a \$1 million grant from the Western New York Regional Economic Council, \$1 million from the John R. Oishei Foundation, and a donation of \$4 million from the Grigg-Lewis Foundation. The Cornerstone CFCU Arena is a federally designated 501(c)(3) not-for-profit corporation.</p> <p>The arena features two NHL-size rinks and 2,000 square feet of tenant space for a restaurant as well as a "green initiative" that resulted in seats heated by the rink's refrigeration equipment.</p> <p>The arena is also an economic generator, expecting to attract more than 150,000 people each year for public skating, competitive hockey, skating lessons, private parties and performance training.</p> <p>Lockport Express (NA3HL) were an original tenant, but they relocated to Hyde Park Arena in Niagara Falls for the 2017/18 season.</p>	
Tenants:	Lockport Lock Monsters Clarence Mustangs Hockey	Lockport HS Lions Buffalo Skating Club Sled Hockey Foundation

3. COMPARABLE FACILITIES: Demographic Comparison

	POPULATION		
Market	30-minute	90-minute	180-minute
Woodridge, IL	2,041,088	7,973,839	10,196,767
Frisco, TX	1,673,445	6,087,439	7,876,148
Hammond, IN	1,508,010	5,455,212	9,382,122
Cheektowaga, NY	952,708	1,333,621	2,361,091
West Seneca, NY	830,949	1,304,492	2,204,937
Rochester, NY	818,016	1,179,686	2,660,223
East Rochester, NY	811,590	1,154,100	2,724,679
West Henrietta, NY	764,196	1,173,698	2,731,309
West Des Moines, IA	634,097	895,503	1,122,346
Stamford, CT	579,649	5,122,040	15,126,718
Provo, UT	559,420	1,950,405	2,596,989
Dimondale, MI	470,597	1,619,329	6,340,527
Grand Chute, WI	442,101	976,454	1,854,618
Davenport, IA	341,930	637,980	1,345,606
Batavia, NY	143,741	2,075,394	2,484,305
Cape Girardeau, MO	96,648	246,412	723,759
Salina, KS	73,852	234,771	955,742
Average	787,400	2,334,100	4,387,700
Rank (Out of 17)	15	5	10

	AVG HH INCOME		
Market	30-minute	90-minute	180-minute
Stamford, CT	\$166,226	\$103,001	\$112,694
Frisco, TX	\$117,227	\$97,408	\$94,557
Woodridge, IL	\$109,321	\$100,050	\$96,491
West Des Moines, IA	\$92,112	\$87,928	\$83,869
Provo, UT	\$88,289	\$94,380	\$93,567
Grand Chute, WI	\$81,596	\$78,993	\$77,926
Rochester, NY	\$81,586	\$78,146	\$76,279
East Rochester, NY	\$81,434	\$78,464	\$75,717
West Henrietta, NY	\$81,082	\$78,329	\$75,799
Dimondale, MI	\$76,861	\$79,309	\$80,919
Davenport, IA	\$76,771	\$74,891	\$76,666
Cheektowaga, NY	\$76,745	\$74,981	\$75,989
Batavia, NY	\$74,692	\$77,383	\$76,178
West Seneca, NY	\$73,692	\$74,886	\$73,962
Hammond, IN	\$69,034	\$89,633	\$95,660
Salina, KS	\$67,472	\$67,361	\$68,779
Cape Girardeau, MO	\$63,652	\$60,411	\$61,132
Average	\$87,700	\$82,400	\$82,500
Rank (Out of 17)	13	12	11

	CORPORATE BASE		
Market	30-minute	90-minute	180-minute
Woodridge, IL	76,332	274,309	343,398
Frisco, TX	65,045	216,184	267,680
Hammond, IN	40,114	181,904	321,415
Stamford, CT	38,942	168,446	597,174
Cheektowaga, NY	29,989	42,017	78,837
Rochester, NY	29,312	41,466	90,847
East Rochester, NY	29,181	40,620	93,304
West Henrietta, NY	27,952	41,187	93,328
West Seneca, NY	26,940	41,265	74,508
West Des Moines, IA	21,736	30,506	41,551
Grand Chute, WI	16,510	35,413	68,006
Dimondale, MI	15,527	55,255	214,962
Provo, UT	14,490	58,915	74,334
Davenport, IA	12,086	23,006	50,510
Batavia, NY	4,346	69,512	82,433
Cape Girardeau, MO	3,962	9,368	26,285
Salina, KS	3,386	9,699	38,824
Average	\$28,200	\$79,300	\$154,700
Rank (Out of 17)	15	5	9

Source: Esri, 2019.

Note: Sorted by 30-minute drive time.

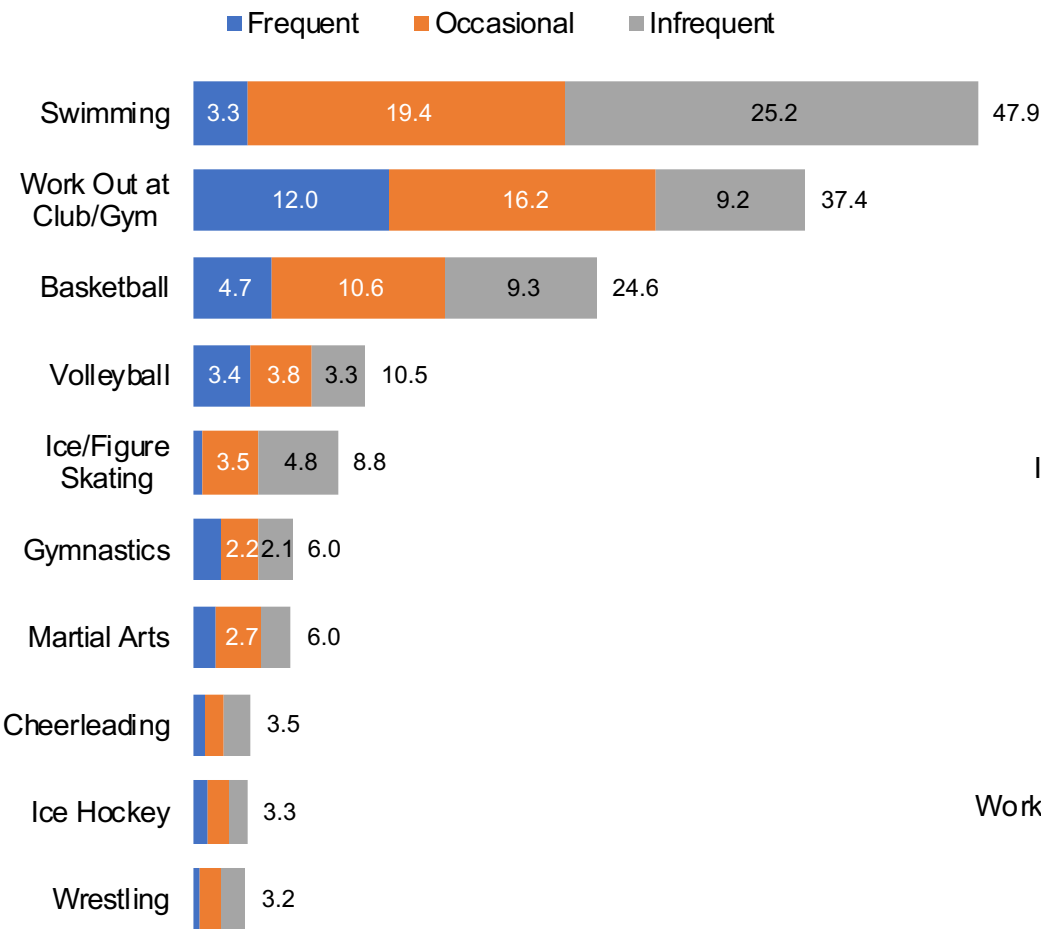
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INDUSTRY TRENDS

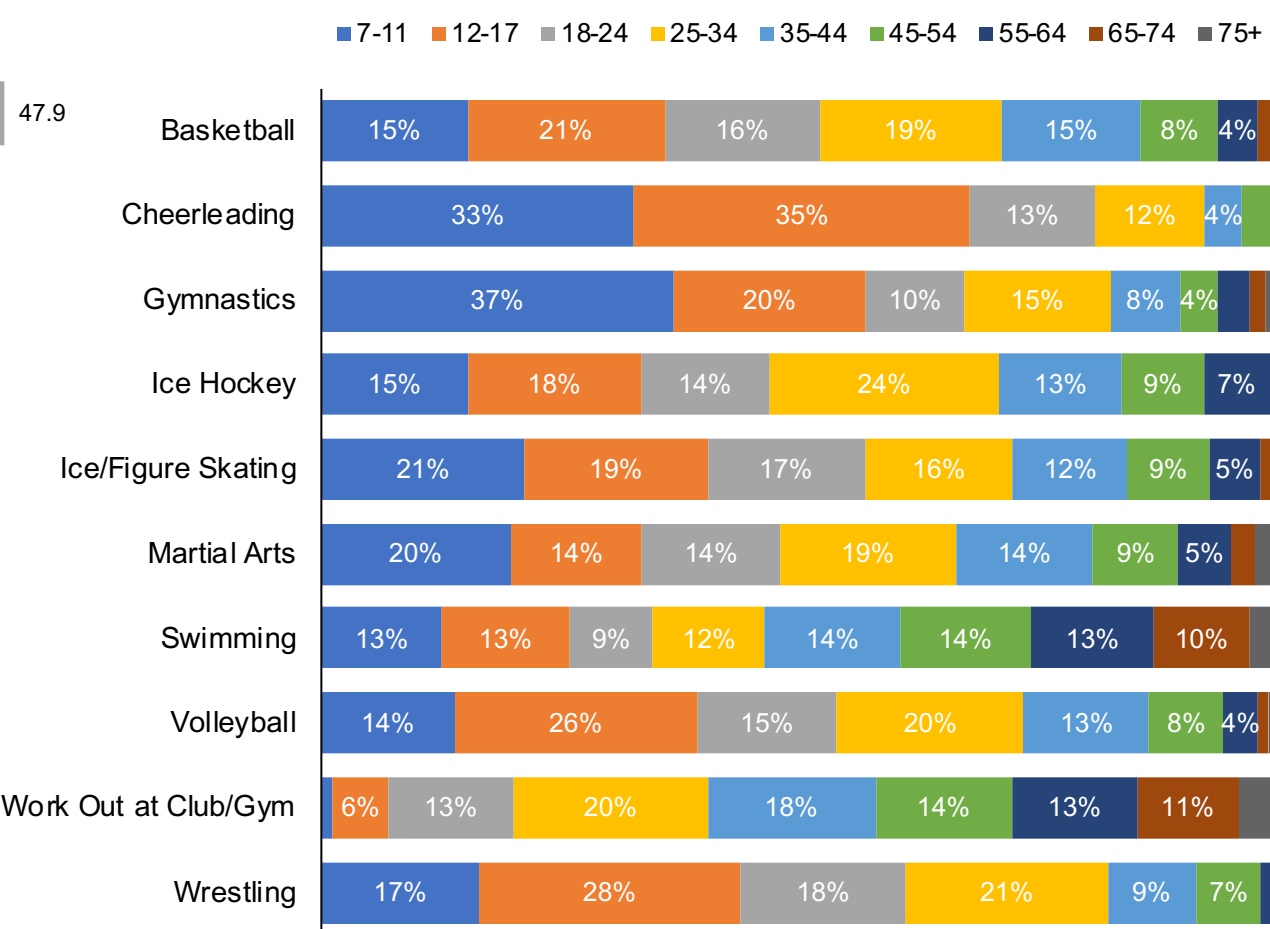


4. INDUSTRY TRENDS: Indoor Sports Participation

National Participation Levels By Frequency (in millions)

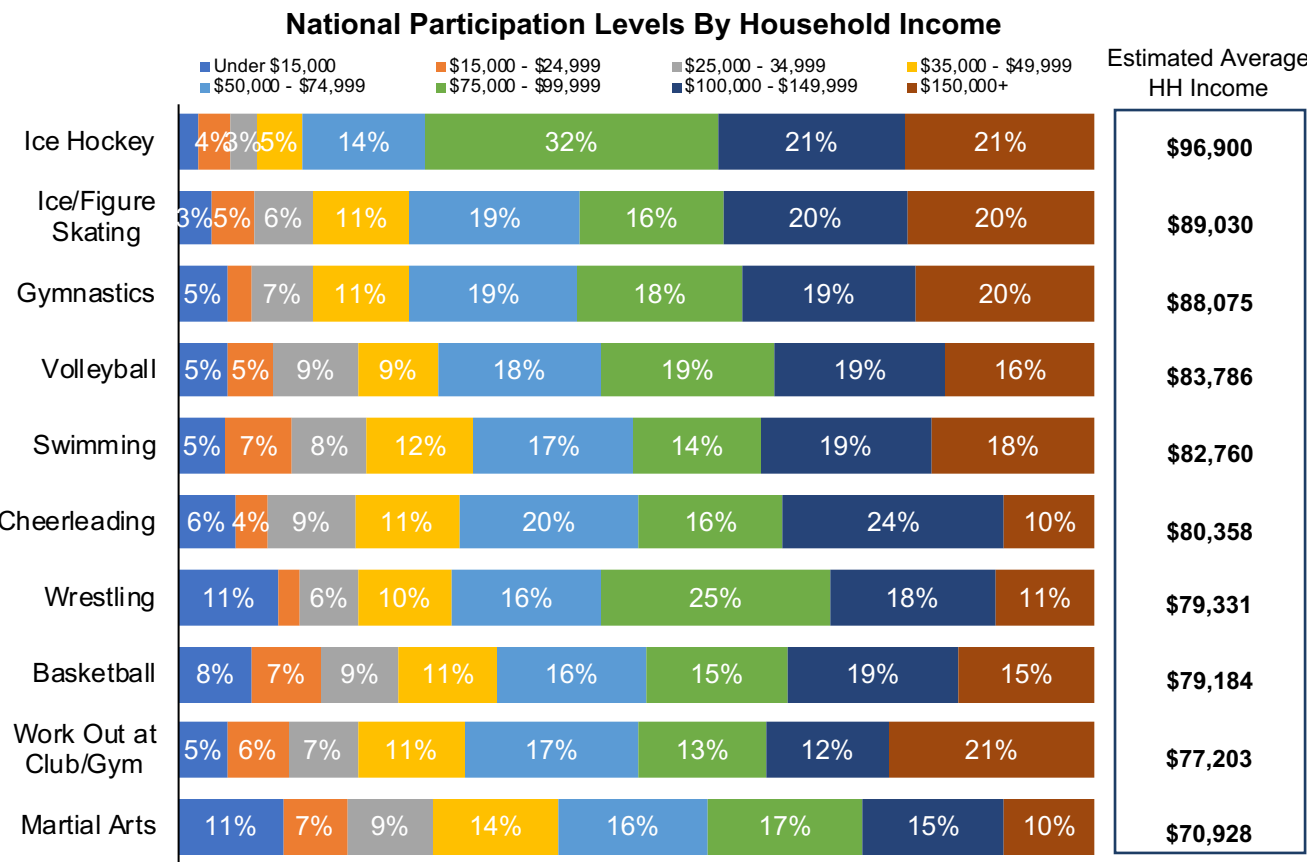


National Participation Levels By Age



Note: Certain indoor sports relevant to this study (i.e., indoor soccer, rugby, football, etc.) were not included in the industry survey cited on this page.
Source: National Sporting Goods Association (NSGA), 2019.

4. INDUSTRY TRENDS: Indoor Sports Participation



National & Regional Participation (Frequent Participants Only)				
	Frequent Participation (times annually)	National Frequent Participation Rate	Middle Atlantic Index	Adjusted Middle Atlantic Participation Rate
Basketball	50+	1.42%	66	0.94%
Cheerleading	70+	0.22%	85	0.19%
Gymnastics	40+	0.51%	93	0.47%
Ice Hockey	30+	0.24%	161	0.39%
Ice/Figure Skating	30+	0.14%	108	0.15%
Martial Arts	80+	0.43%	52	0.22%
Swimming	110+	0.98%	82	0.80%
Volleyball	20+	1.03%	96	0.99%
Work Out at Club/Gym	110+	3.61%	93	3.36%
Wrestling	50+	0.13%	85	0.11%

Note: Certain indoor sports relevant to this study (i.e., indoor soccer, rugby, football, etc.) were not included in the industry survey cited on this page.
Source: National Sporting Goods Association (NGSA), 2019.

4. INDUSTRY TRENDS: Indoor Sports Participation

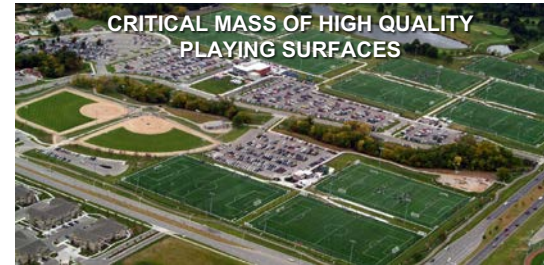
Extrapolation of Frequent Participant Base by Sport

Market Population:	City of Batavia		Genesee County		30-minute Drive Time		60-minute Drive Time		90-minute Drive Time		State of New York	
	Based on National Rate (1)	Based on Regional Rate (2)	Based on National Rate (1)	Based on Regional Rate (2)	Based on National Rate (1)	Based on Regional Rate (2)	Based on National Rate (1)	Based on Regional Rate (2)	Based on National Rate (1)	Based on Regional Rate (1)	Based on National Rate (1)	Based on Regional Rate (2)
	15,249		59,416		123,362		2,047,473		2,484,305		20,030,453	
Basketball	217	143	844	557	1,753	1,157	29,092	19,201	35,299	23,297	284,605	187,839
Cheerleading	33	28	129	110	269	229	4,462	3,793	5,415	4,602	43,656	37,108
Gymnastics	78	72	302	281	628	584	10,422	9,692	12,645	11,760	101,955	94,818
Ice Hockey	37	59	143	231	298	479	4,939	7,952	5,993	9,649	48,320	77,795
Ice/Figure Skating	22	24	85	92	176	190	2,927	3,161	3,551	3,835	28,634	30,925
Martial Arts	66	34	256	133	532	277	8,832	4,593	10,717	5,573	86,408	44,932
Swimming	149	123	582	477	1,209	991	20,062	16,451	24,342	19,961	196,269	160,940
Volleyball	157	151	612	587	1,270	1,219	21,083	20,240	25,582	24,558	206,259	198,009
Work Out at Club/Gym	551	512	2,146	1,996	4,455	4,143	73,945	68,769	89,722	83,441	723,408	672,769
Wrestling	20	17	80	68	165	140	2,740	2,329	3,324	2,826	26,802	22,782
TOTAL	1,329	1,163	5,180	4,532	10,755	9,410	178,505	156,181	216,589	189,502	1,746,316	1,527,917

Note: Certain indoor sports relevant to this study (i.e., indoor soccer, rugby, football, etc.) were not included in the industry survey cited on this page.
(1) Extrapolated hypothetical number of participants relative to each indicated geographical area based on NSGA's national survey results.
(2) Extrapolated hypothetical number of participants relative to each indicated geographical area based on NSGA's regional survey results specific to the Mid-Atlantic Region.
Source: National Sporting Goods Association (NSGA), Esri, 2019.

4. INDUSTRY TRENDS: Facility Trends

- Critical mass of high quality courts, fields & playing surfaces.
- Maximization of local uses and sports tourism.
- Flexibility to accommodate the widest variety of uses.
- Synthetic turf (indoor & outdoor) is increasing accepted and expected by most tournament and local sports/rec activity.
- Growing emphasis on partnerships (equity, sponsorship and ancillary development).
- Focus on creating/enhancing the quality of sub-destinations surrounding facility complexes.
- Incorporation of quality amenities & specialty components:
 - Performance centers
 - eSports capabilities/technology
 - Restaurants/cafes/food courts
 - Fitness & wellness
 - Leisure amenities (child play areas, mini-golf, AR tech)
 - Ancillary development (hotels, retail, attractions)



5.

MARKET DEMAND



5. MARKET DEMAND: Stakeholder & User Group Interviews

FALLETI ARENA

Opinions of Product and Desired Improvements

- In general, most local user groups are adequately accommodated in terms of schedule needs.
- Nearly all interviewees indicated a need for physical product improvements at Falleti Arena. Commonly mentioned items that are in need of repair, improvement, or replacement included:
 - building exterior
 - lobby/circulation space
 - Team and Admin offices
 - locker rooms (girls locker room especially) and referee's room
 - Restrooms
 - bleachers and safety netting
 - concessions
 - box office
 - Refrigeration/mechanical
 - Party room
- As with many facilities of its vintage, much of Falleti Arena's physical and functional product is growing increasingly substandard relative to state-of-the-industry arena facilities.
- A number of groups indicated challenges with current management, in terms of customer service and maintenance issues.
- New amenities/capabilities that were mentioned as desired include: second sheet of ice, performance/training center, food court, more meeting rooms, and kids activity space.

5. MARKET DEMAND: Stakeholder & User Group Interviews

BATAVIA

Strengths & Weaknesses of Local Market / Destination

- A new multi-sport complex, if positioned correctly in terms of accessibility and affordability, could serve as a strong community asset and allow sports and recreation programming and participation to grow across multiple sports and activities.
- Location of Batavia would allow for a convenient central location for tournaments drawing teams from Rochester and Buffalo.
- Any project that is not “cash neutral” will be a difficult sell to elected officials and taxpayers.
- A new sports authority or nonprofit could be considered for creation to spearhead fundraising and serve to oversee scheduling and rates.
- Creek Park area is a good location for a new complex or an expanded Falletti Arena. Walking proximity to downtown shops and restaurants.
- Some noted limitations/weaknesses of Batavia as host to a new multi-sport complex included:
 - Relative to larger markets, low population and base of sports organization/clubs/leagues and players.
 - Limitations in visitor amenities, including hotels, attractions and “things to do” to maximize appeal to sports tourism markets.

5. MARKET DEMAND: Stakeholder & User Group Interviews

ICE USER GROUPS

Facility Needs & Anticipated Use

- Strong belief that a minimum of two sheets of ice are needed for any realistic attraction of significant tournament activity.
- Local youth and adult hockey participation is flat and, at some levels, decreasing. However, girls hockey is growing in terms of participation and demand.
- GAHA has 241 registered skaters in the 2018-2019 season.
- Most local hockey demand is adequately accommodated by a single sheet of ice. However, a second sheet could provide opportunities to grow programming and practice/training hours, along with the creation and attraction of tournaments.
- If a second sheet of ice is not developed in Batavia, at a minimum, significant improvements should be made to Falleti Arena.
- A significant portion of people who use Falleti Arena do not live in Batavia.
- Genesee Community College could potentially add men's, women's and club programs in the future should a new complex be developed.
- Given the relatively low number of local teams and skaters, as well as the large number of rinks in Rochester and Buffalo, hockey tournament demand for a two-sheet ice complex is considered moderate.
- Batavia does present a niche opportunity to be an attractive central location for certain tournaments pulling teams from both Rochester and Buffalo markets. However, demand is more than a function of just location—it also relates to destination appeal and visitor amenities.

5. MARKET DEMAND: Stakeholder & User Group Interviews

TURF USER GROUPS

Facility Needs & Anticipated Use

- In cold weather markets, indoor turf facilities are often highly desired by nearly all outdoor sports for off-season training, clinics, and winter play.
- Strong demand now for indoor turf from soccer, rugby and touch football. Field hockey and lacrosse would also be interested.
- Probably more unmet demand for turf than for hockey. Genesee Travel Soccer, Batavia Soccer Club, Batavia High School all expressed interest in a turf facility.
- Definitely a need in Batavia and Genesee County for indoor turf space for off season training by outdoor sports groups. Baseball and softball travel teams could use turf facility year round for indoor training. Athlete's Edge in downtown is essentially the only dedicated indoor training facility. YMCA gymnasium is also used for some training.
- Empire United Soccer Academy absorbs some of demand for training for largely elite players/teams, but a new turf complex in Batavia could be complementary with them and also create synergy with the Turf Farm outdoor complex.
- Batavia is a central location that could attract tournaments and travel games from both Rochester and Buffalo markets.
- Biggest thing for most turf user groups would be cost to rent/use facility.
- 9 v 9 soccer tournaments.
- In 2007, a \$5m indoor soccer facility was proposed, but stalled at the fundraising stage.
- Ideally, the indoor turf complex would be located nearby the outdoor field complex, but not likely possibly give the location the Turf Farm.

5. MARKET DEMAND: Stakeholder & User Group Interviews

OTHER SPORTS USER GROUPS

Facility Needs & Anticipated Use

- Strong need for additional court space in Batavia for a variety of sports and recreation.
- Availability of school gyms is significantly limited for outside user groups during peak mid-week times. Some availability on weekends.
- Inability to accommodate tournament demand locally for basketball and volleyball tournaments.
- A multi-court facility complex could allow for creation of new programs, leagues and clubs—allowing for a centralized home to grow programs and participation.
- AAU travel basketball would be very interested in a hardcourt complex.
- Genesee Community College Fieldhouse is expensive and not available for many outside groups. Cost alone prevents its consideration by many potential local user groups.
- Cost to use the facility will be an overriding consideration for most local groups.
- Batavia's central location between Rochester and Buffalo represents an opportunity for all types of court tournaments/competitions.
- Demand noted among the following sports segments:
 - Youth and adult basketball
 - Youth volleyball
 - Dance/cheer

5. MARKET DEMAND: Conclusions

1. Ice Demand:

While a moderate number of new hockey tournaments could be attracted to Batavia with a second sheet of ice, local demand for a second sheet is not sufficient at the present time to sustain acceptable occupancy levels of a two-sheet complex.

2. Falleti Arena:

However, significant repair and improvements are recommended to Falleti Arena in order to elevate the physical product closer to industry standards and protect its ability to serve as a safe and productive asset for the community.

3. Indoor Turf Demand:

Indoor turf demand, both in terms of local and non-local user groups, is estimated to be strong. Core demand usage would be expected to come from soccer groups (leagues and off-season training, camps & clinics), along with baseball and softball (training) and football, rugby, field hockey, and lacrosse groups.

4. Indoor Court Space Demand:

Demand for indoor court space is considered moderate to strong. A multi-court facility complex could allow for creation of new programs, leagues and clubs—allowing for a centralized home to grow programs and participation.

5. Influence of Rochester and Buffalo:

While there are a number of indoor turf, court and ice complexes in and near Rochester and Buffalo, Batavia's centralized location represents an opportunity to attract certain types of tournaments/games that involve teams from the two markets.

6. Location:

The Creek Park area is an attractive location for a multi-sport facility development, given its close proximity to downtown, the mixed-use elements planned for development, and the existence of Falleti Arena.

7. Facility Type:

Market research and analysis findings suggest sufficient demand to consider an appropriately sized indoor turf facility or a combined indoor turf plus hardwood facility.

6.

PROGRAM & DEVELOPMENT OPTIONS



6. DEVELOPMENT: Industry Typical by Facility Complex Type

	ICE COMPLEX	HARDWOOD COMPLEX	TURF COMPLEX
Building Size	80,000 to 120,000 GSF	100,000 to 140,000 GSF	40,000 to 200,000 GSF
Owner	Public	Public	Public or Private
Operator	Public or Private	Public or Private	Public or Private
Private Partner Equity Contribution/Profit Sharing	No	Sometimes	No
Number of Tenant User Groups	3 to 7	5 to 10	4 to 8
Annual Attendance (athletes + spectators)	150,000 to 300,000	200,000 to 500,000	75,000 to 200,000
Annual Operating Profit/Loss	(\$500,000) to (\$200,000)	(\$200,000) to \$1,000,000	(\$400,000) to \$200,000
Sports Tourism Impact (per surface)	Moderate	High	Moderate
Use Types	Ice Hockey Figure Skating Curling Open Skating / Learn-to-Skate	Basketball Volleyball Cheerleading Dance Wrestling Gymnastics Futsal Pickleball Table Tennis Badminton Running / Walking Fitness / Aerobics Martial Arts Public / Consumer Shows Tradeshows Special Events Open Leisure / Recreation	Soccer Lacrosse Rugby Field Hockey Football (American) Football (Flag) Football (Australian Rules) Baseball Softball Running / Walking Special Events Open Leisure / Recreation

6. DEVELOPMENT: Market Indicated Facility Options

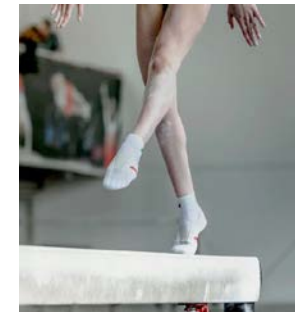
- **Option 1 - Indoor Turf & Hardwood Facility**
 - Synthetic Turf
 - 200' x 200' turf surface
 - 2 soccer fields (185' x 75' or 180' x 80')
 - 4 batting cages per quad (10' x 12' x 70')
 - Hardwood
 - 3 full-sized basketball courts (95' x 50' + alleys)
 - 6 full-sized volleyball courts (60' x 30' + alleys)
 - Falleti Arena improvements
- **Option 2 – Large Indoor Turf Facility**
 - Synthetic Turf
 - Full-sized turf field
 - 345' x 210'
 - 115 yds x 70 yds
 - Falleti Arena improvements

CHARACTERISTICS/AMENITIES (both options)

- Turf component:
 - Dropdown nets to separate spaces and batting/training cages
 - 35-foot ceiling height
- Court component:
 - Bleachers, netting, equipment, scoreboards, and other standard amenities
 - 35-foot ceiling height
- Amenities:
 - Locker/team rooms
 - Fitness/wellness facilities
 - Walking track
 - Play areas
 - Food court/café
 - Performance & esports

6. DEVELOPMENT: Successful Implementation

- Project success will be influenced by:
 - Site/location
 - Design collaboration (including advisors stakeholders and key user groups)
 - Partnerships (naming, sponsorship, use, service provision)
 - Best practices approach to amenities, functionality, flexibility & branding
 - Appropriate business plan:
 - Inclusiveness to maximize local participation and growth of sports & recreation programs
 - Booking policy, scheduling priorities & rates
 - Balancing local & non-local usage, in-house programming & rentals
 - Quality services & amenities



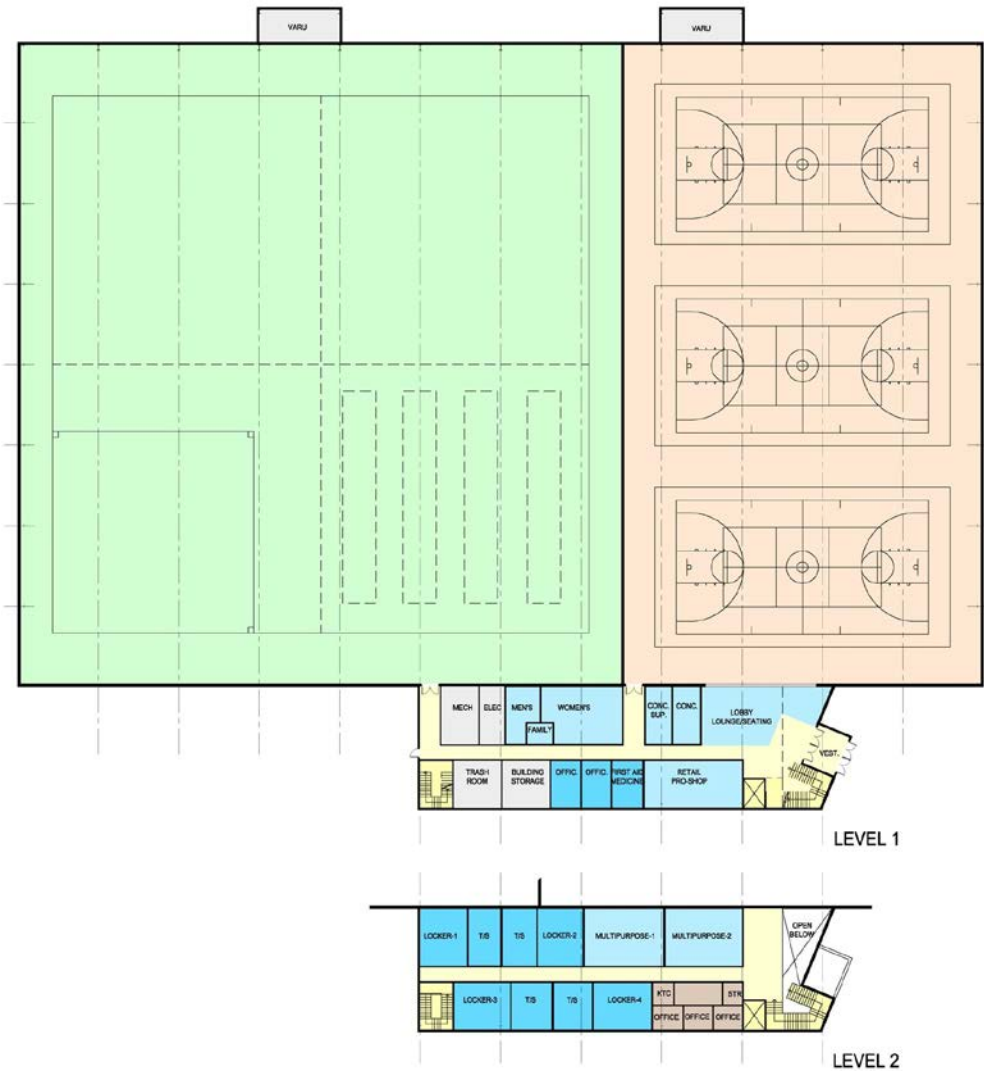
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COST/BENEFIT ANALYSIS

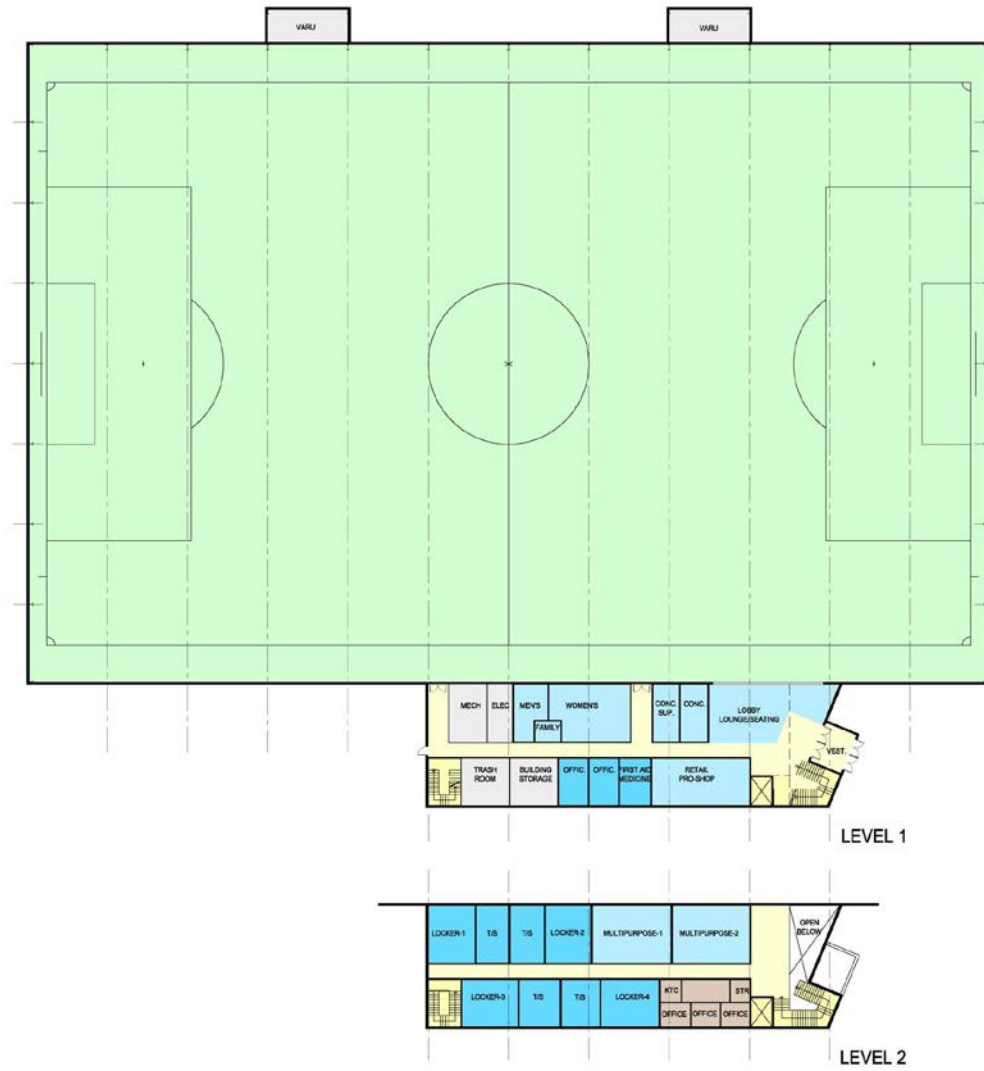


7. COST/BENEFIT: Facility Concept Layouts

OPTION 1: Indoor Turf & Hardwood Facility



OPTION 2: Large Indoor Turf Facility



7. COST/BENEFIT: Potential Site Orientation



7. COST/ BENEFIT

Facility Concept Program

Group	Program Space	Qty	Area	Total	Notes
1.00	Public				
	Vestibule	1	200	200	
	Lobby	1	400	400	
	Lounge/Seating	1	400	400	
	Men's Restroom	1	240	240	2 urinals, 2 toilets, 2 lavatories
	Women's Restroom	1	460	460	5 toilets, 3 lavatories
	Family Restroom	1	80	80	
	Retail/Pro-Shop	1	600	600	
	Multipurpose/Party Rental	2	800	1,600	Subdividable
	Concessions	1	200	200	
	Concessions Support	1	200	200	
1.00	Subtotal Public NSF			4,380	
2.00	Administrative				
	Reception	1	150	150	
	Offices	3	120	360	
	Kitchenette	1	100	100	
	Storage	1	100	100	
2.00	Subtotal Administrative NSF			710	
3.00	Team Support				
	Locker Rooms	4	350	1,400	25 capacity/population
	Locker Room Toilet/Shower	4	300	1,200	2 toilets, 1 lavatories, 3 showers
	Officials	2	200	400	
	First Aid/Sports Medicine	1	200	200	
3.00	Subtotal Team Support NSF			3,200	
4.00	Miscellaneous				
	Mechanical	1	300	300	
	Electrical	1	200	200	
	Trash/Recycling	2	180	360	Men's and Women's
	Building Storage	1	300	300	
4.00	Subtotal Miscellaneous NSF			1,160	
	Subtotal 1.00 - 4.00 NSF			9,450	
	Subtotal 1.00 - 4.00 GSF			12,600	75% efficiency
5.00	Multi-Sport Space				
	Option 1: Court/Field Space	1	87,300	87,300	360' x 240'; includes envelope and structure + (2) VARU ¹ @ 900 SF
	Option 2: Field Space	1	87,300	87,300	360' x 240'; includes envelope and structure + (2) VARU ¹ @ 900 SF
	Option 3: Field Space	1	54,900	54,900	225' x 240'; includes envelope and structure + (2) VARU ¹ @ 900 SF
	Note 1: VARU = Vertical Air Rotation Unit; Mechanical approach to eliminate ductwork				
	Option 1		99,900	GSF	Total Building Area
	Option 2		99,900	GSF	

7. COST/BENEFIT: Option 1 & 2 Construction Cost Estimate

Description	Notes	Quantity	Unit	Cost	Total
SITE WORK					\$1,584,500
Demolition	Remove pavement/parking and dispose	1,500	CY	\$30.00	\$45,000
	Misc. demo -	1	LS	\$15,000.00	\$15,000
	clear & grub treed areas	1	LS	\$15,000.00	\$15,000
Site Prep	Stabilized const entry	1	LS	\$3,500.00	\$3,500
	SWM and RRV (detention & infiltration below prkg.)	1	LS	\$100,000.00	\$100,000
Earth work	Mass grading 12"x area.	6,000	CY	\$7.00	\$42,000
	Dispose 6"x area	3,000	CY	\$25.00	\$75,000
	Fine grading	18,000	SY	\$1.00	\$18,000
Erosion Control	Silt Socks, Inlet protection etc.	1	LS	\$25,000.00	\$25,000
Storm Drainage	Manholes/catch basins	10	EA	\$3,500.00	\$35,000
	12" HDPE Pipe (ave size)	1,600	LF	\$30.00	\$48,000
Concrete	Concrete walks, 5" thick	17,500	SF	\$9.00	\$157,500
	Curbs (6"x18")	4,000	LF	\$25.00	\$100,000
Asphalt parking	Asphalt (8" stone, geo fabric, 4" asphalt)	6,400	SF	\$6.00	\$38,400
	Subbase Stone	3,700	CY	\$30.00	\$111,000
	1 1/2" Asphalt top course	17800	SY	\$8.00	\$142,400
	2 1/2" Asphalt binder course	17800	SY	\$14.00	\$249,200
	Striping, marking, Signage	1	LS	\$25,000.00	\$25,000
Water	main to building (6" main)	500	LF	\$50.00	\$25,000
	Valves and street connection	1	LS	\$10,000.00	\$10,000
	Fire Hydrants	2	LS	\$7,500.00	\$15,000
Sanitary Sewer	6" san sewer	500	LF	\$50.00	\$25,000
	Manholes	2	EA	\$3,500.00	\$7,000
	Street connection	1	LS	\$7,500.00	\$7,500
Gas	Gas Main to building	1	LS	\$20,000.00	\$20,000
Electric to Building	Underground from street	500	LF	\$60.00	\$30,000
	Electric transformer, ground mounted	1	LS	\$75,000.00	\$75,000
Landscape Plantings	Trees, shrubs, lawn areas.	1	LS	\$50,000.00	\$50,000
Parking Lot Lighting		10	EA	\$7,500.00	\$75,000
BUILDING CONSTRUCTION				Option 1	\$20,383,800
				Option 2	\$19,687,500

Description	Notes	Quantity	Unit	Cost	Total
Detail:					
Support Areas		12,600	GSF	\$350.00	\$4,410,000
Option 1 - Fieldhouse¹	Turf section ²	55,650	GSF	\$175.00	\$9,738,750
	Hardwood courts section ³	31,650	GSF	\$197.00	\$6,235,050
	<i>Subtotal</i>				\$15,973,800
Option 2 - Fieldhouse¹	All turf ²	87,300	GSF	\$175.00	\$15,277,500
Note 1: \$170/SF Pricing based on University of Buffalo Murchie Family Fieldhouse completed 2018 and escalated 1 year to 2019 dollars Note 2: \$5.00/SF premium for assumed high watertable; requiring asphalt base and pad Note 3: \$27.00/SF premium for concrete slab, vapor barrier and wood performance floor					
BUILDING/SITE CONSTRUCTION SUBTOTALS				Option 1	\$21,968,300
				Option 2	\$21,272,000
General Requirements 16%				Option 1	\$3,514,928
				Option 2	\$3,403,520
Includes: General Conditions, Trailers, Supervision, Mobilization, Temporary Sevicess, Insurance, Bonding, Permits, Winter Conditions					
CM/GC Fee 4%				Option 1	\$878,732
				Option 2	\$850,880
Construction Contingency 5% (Owner Construction Contingency)				Option 1	\$1,098,415
				Option 2	\$1,063,600
BUILDING/SITE CONSTRUCTION TOTALS				Option 1	\$27,460,375
				Option 2	\$26,590,000

7. COST/BENEFIT: Falleti Arena Improvement Cost Estimate

Built in 1978, the 41-year-old arena has had few renovations and exhibits the wear and tear of a facility of that age. The refrigeration equipment is largely original and beyond its proposed life expectancy. In addition, the typical ice slab has a life expected effective life cycle of 30-35 years.

Deficits / Recommended Corrections:

- R-22 refrigerant is federally-mandated to be replaced by 2020. This work was slated for 2019 and would maintain existing piping, pumps and cooling tower. Options exist for systems with 20-year (R-134A Refrigerant) or 30-year (R-507 refrigerant) life cycles with different first cost impacts. Further study is required to determine the lifespan of the existing equipment and piping.
- Renovations need at public spaces, including lobby, warming area, concessions, restrooms, administration and pro shop; updated finishes, branding, and toilet partitions.
- New spectator seating. Replace the existing wood inaccessible seating with closed riser, non-combustible accessible spectator seating (assume a slight seating loss due to ramps and accessible seating).
- Locker room renovations are needed. Replacement of toilet partitions, new finishes, and new stick racks.
- Dasher board replacement. New dasher board systems have significantly improved safety features.
- Ice slab repair or full replacement.
- New performance floor tiles (for use as multipurpose facility during swing seasons).
- Overall lack of facility and team storage (new construction/addition required; 2,000 square feet).
- Need improved party/multi-purpose rooms. Two would be ideal (part of new construction; 400 square feet).
- Gender Equity. Add women's/girl's locker room (part of new construction, 750 square feet).

Cost Projections:

- Renovations: $11,000 \text{ SF} \times \$200/\text{SF} = \$2,200,000$
- Reorientation of the lobby to face the internalized drive and drop off to the south (part of renovation scope)
- Building addition: $3,150 \text{ SF} \times \$350/\text{SF} = \$1,102,000$
- New dasher board system (recommended): \$250,000
- Seating replacement: $450 \text{ seats} \times \$250/\text{seat} = \$112,500$
- **ESTIMATED TOTAL: \$3.7 Million**

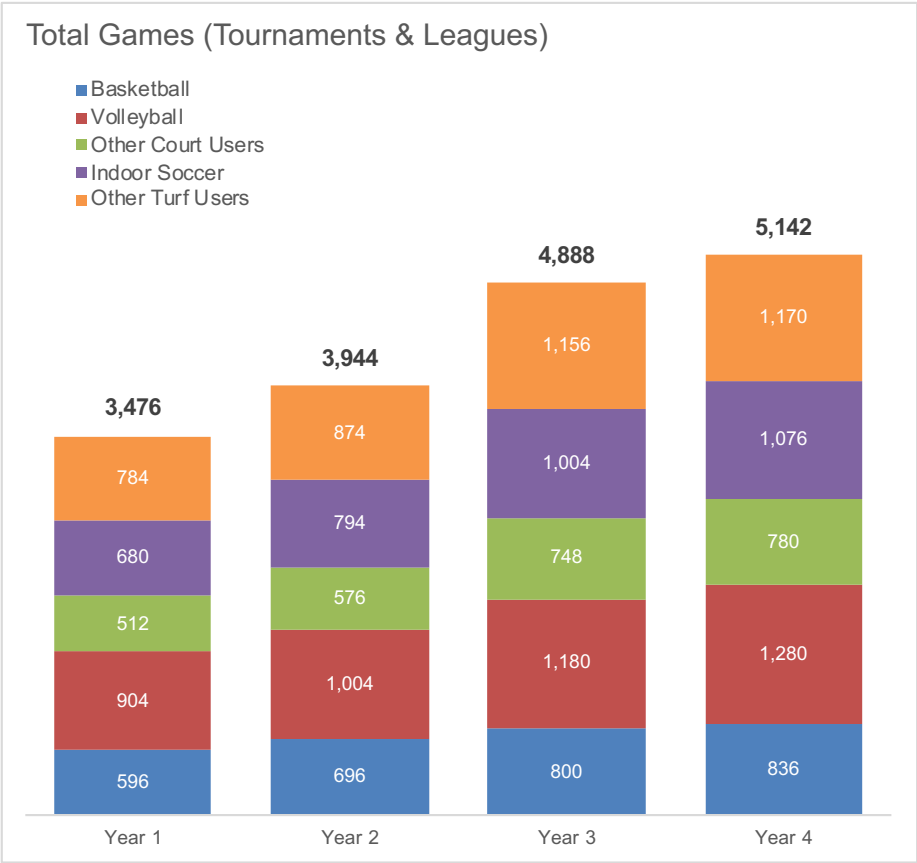
Potential Additional Items (Requiring Systems Evaluation):

- New concrete ice floor with all piping and underfloor heat system: \$430,000
- Demolition of existing floor and disposal of refrigerant: \$110,000
- New refrigeration system with all piping, pumps, and cooling tower: Commercial grade system utilizing R-134A refrigerant, 20-year life cycle: \$475,000
- Industrial grade system utilizing R-507 refrigerant, 30-year life cycle: \$750,000
- Demolition of existing refrigeration equipment: \$25,000

7. COST/BENEFIT: Estimated Utilization

UTILIZATION	Opening Year 1	Year 2	Year 3	Stabilized Year 4	20-Year Cumulative
LEAGUE TEAMS					
Basketball	26	30	32	32	568
Volleyball	16	20	22	26	448
Other Court Users	14	18	22	24	414
Indoor Soccer	28	31	34	34	603
Other Turf Users	32	35	38	39	690
Total	116	134	148	155	2,723
LEAGUE GAMES					
Basketball	416	480	512	512	9,088
Volleyball	256	320	352	416	7,168
Other Court Users	224	288	352	384	6,624
Indoor Soccer	392	434	476	476	8,442
Other Turf Users	448	490	532	546	9,660
Total	1,736	2,012	2,224	2,334	40,982
TOURNAMENTS					
Basketball	5	6	8	9	154
Volleyball	11	12	15	16	278
Other Court Users	6	6	8	8	140
Indoor Soccer	7	9	12	14	238
Other Turf Users	9	11	16	16	276
Total	38	44	59	63	1,086
TOURNAMENT GAMES					
Basketball	180	216	288	324	5,544
Volleyball	648	684	828	864	15,120
Other Court Users	288	288	396	396	6,912
Indoor Soccer	288	360	528	600	10,176
Other Turf Users	336	384	624	624	10,704
Total	1,740	1,932	2,664	2,808	48,456
CAMPS & OTHER RENTALS					
Basketball	12	12	18	18	312
Volleyball	12	12	18	18	312
Other Court Users	12	12	18	18	312
Indoor Soccer	48	60	72	72	1,260
Other Turf Users	24	30	36	36	630
Private Rentals/Practices/Drop-in	1,000	1,000	1,000	1,000	18,000
Total	1,108	1,126	1,162	1,162	20,826

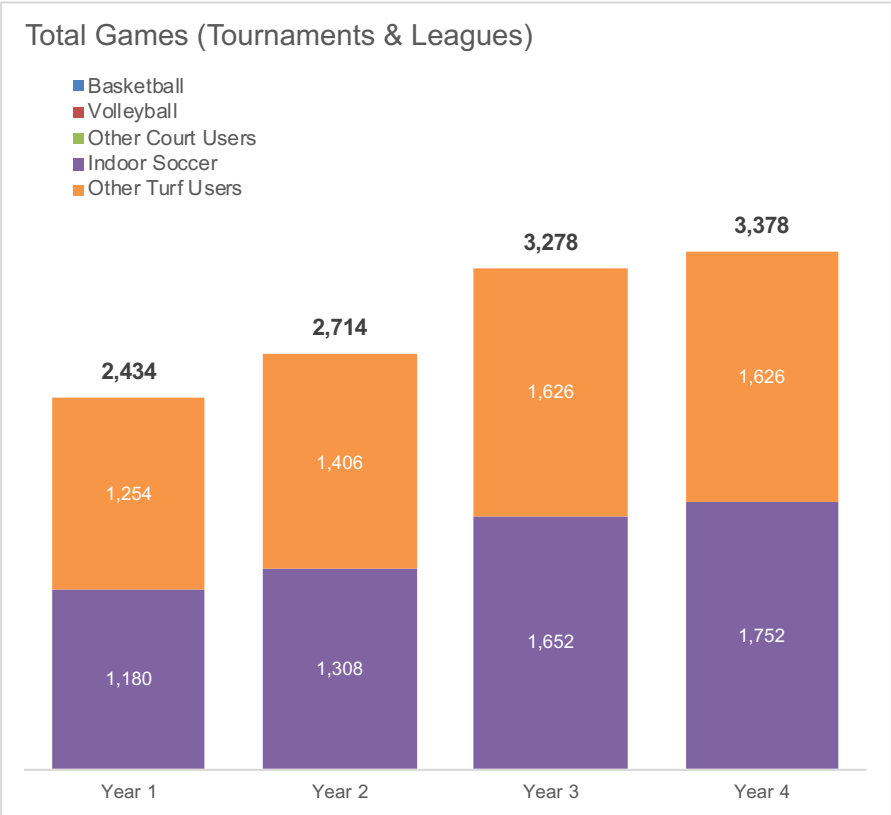
OPTION 1: Indoor Turf & Hardwood Facility



7. COST/BENEFIT: Estimated Utilization

UTILIZATION	Opening Year 1	Year 2	Year 3	Stabilized Year 4	20-Year Cumulative
LEAGUE TEAMS					
Basketball	0	0	0	0	0
Volleyball	0	0	0	0	0
Other Court Users	0	0	0	0	0
Indoor Soccer	38	42	46	48	846
Other Turf Users	45	49	51	51	910
Total	83	91	97	99	1,756
LEAGUE GAMES					
Basketball	0	0	0	0	0
Volleyball	0	0	0	0	0
Other Court Users	0	0	0	0	0
Indoor Soccer	532	588	644	672	11,844
Other Turf Users	630	686	714	714	12,740
Total	1,162	1,274	1,358	1,386	24,584
TOURNAMENTS					
Basketball	0	0	0	0	0
Volleyball	0	0	0	0	0
Other Court Users	0	0	0	0	0
Indoor Soccer	13	15	19	21	362
Other Turf Users	16	19	23	23	403
Total	29	34	42	44	765
TOURNAMENT GAMES					
Basketball	0	0	0	0	0
Volleyball	0	0	0	0	0
Other Court Users	0	0	0	0	0
Indoor Soccer	648	720	1,008	1,080	18,576
Other Turf Users	624	720	912	912	15,936
Total	1,272	1,440	1,920	1,992	34,512
CAMPS & OTHER RENTALS					
Basketball	0	0	0	0	0
Volleyball	0	0	0	0	0
Other Court Users	0	0	0	0	0
Indoor Soccer	60	72	84	84	1,476
Other Turf Users	36	48	60	60	1,044
Private Rentals/Practices/Drop-in	2,200	2,200	2,200	2,200	39,600
Total	2,296	2,320	2,344	2,344	42,120

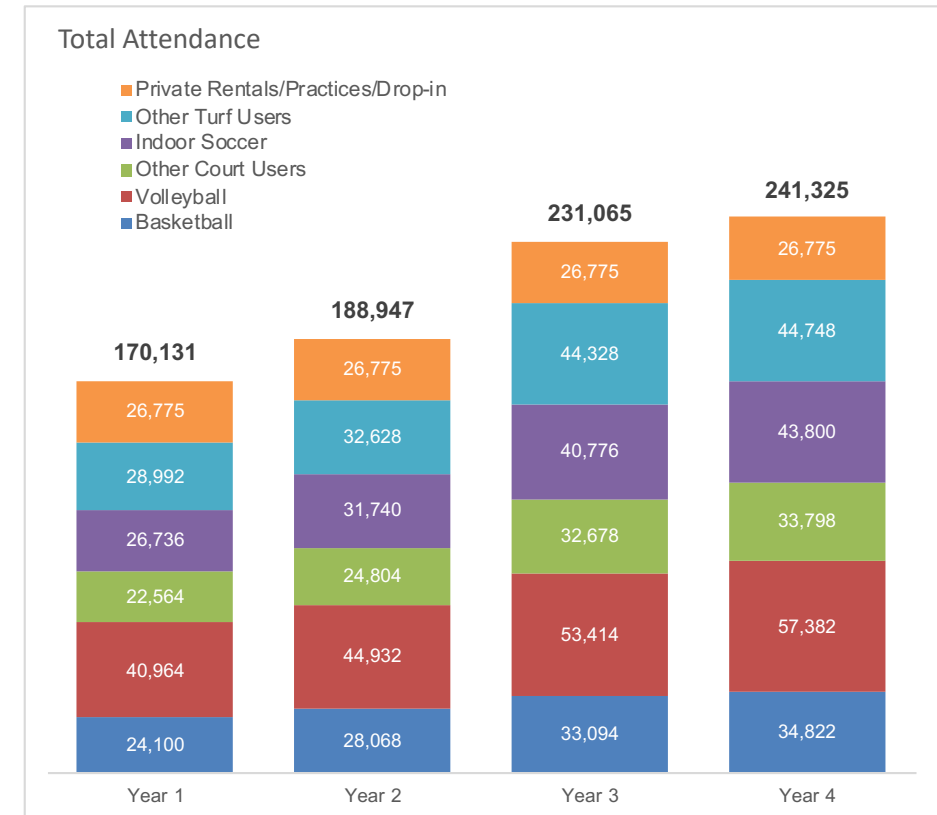
OPTION 2: Large Indoor Turf Facility



7. COST/BENEFIT: Estimated Attendance

ATTENDANCE	Opening Year 1	Year 2	Year 3	Stabilized Year 4	20-Year Cumulative
LEAGUES					
Basketball	5,824	6,720	7,168	7,168	127,232
Volleyball	3,584	4,480	4,928	5,824	100,352
Other Court Users	3,136	4,032	4,928	5,376	92,736
Indoor Soccer	4,704	5,208	5,712	5,712	101,304
Other Turf Users	5,376	5,880	6,384	6,552	115,920
Total	22,624	26,320	29,120	30,632	537,544
TOURNAMENTS					
Basketball	2,880	3,456	4,608	5,184	88,704
Volleyball	10,368	10,944	13,248	13,824	241,920
Other Court Users	4,608	4,608	6,336	6,336	110,592
Indoor Soccer	4,032	5,040	7,392	8,400	142,464
Other Turf Users	4,704	5,376	8,736	8,736	149,856
Total	26,592	29,424	40,320	42,480	733,536
CAMPS & OTHER RENTALS					
Basketball	600	600	900	900	15,600
Volleyball	600	600	900	900	15,600
Other Court Users	600	600	900	900	15,600
Indoor Soccer	1,920	2,400	2,880	2,880	50,400
Other Turf Users	960	1,200	1,440	1,440	25,200
Private Rentals/Practices/Drop-in	26,775	26,775	26,775	26,775	481,950
Total	31,455	32,175	33,795	33,795	604,350
SPECTATORS					
Basketball	14,796	17,292	20,418	21,570	376,056
Volleyball	26,412	28,908	34,338	36,834	642,168
Other Court Users	14,220	15,564	20,514	21,186	368,088
Indoor Soccer	16,080	19,092	24,792	26,808	462,084
Other Turf Users	17,952	20,172	27,768	28,020	486,192
Total	89,460	101,028	127,830	134,418	2,334,588
TOTAL ATTENDANCE					
Basketball	24,100	28,068	33,094	34,822	607,592
Volleyball	40,964	44,932	53,414	57,382	1,000,040
Other Court Users	22,564	24,804	32,678	33,798	587,016
Indoor Soccer	26,736	31,740	40,776	43,800	756,252
Other Turf Users	28,992	32,628	44,328	44,748	777,168
Private Rentals/Practices/Drop-in	26,775	26,775	26,775	26,775	481,950
Total	170,131	188,947	231,065	241,325	4,210,018

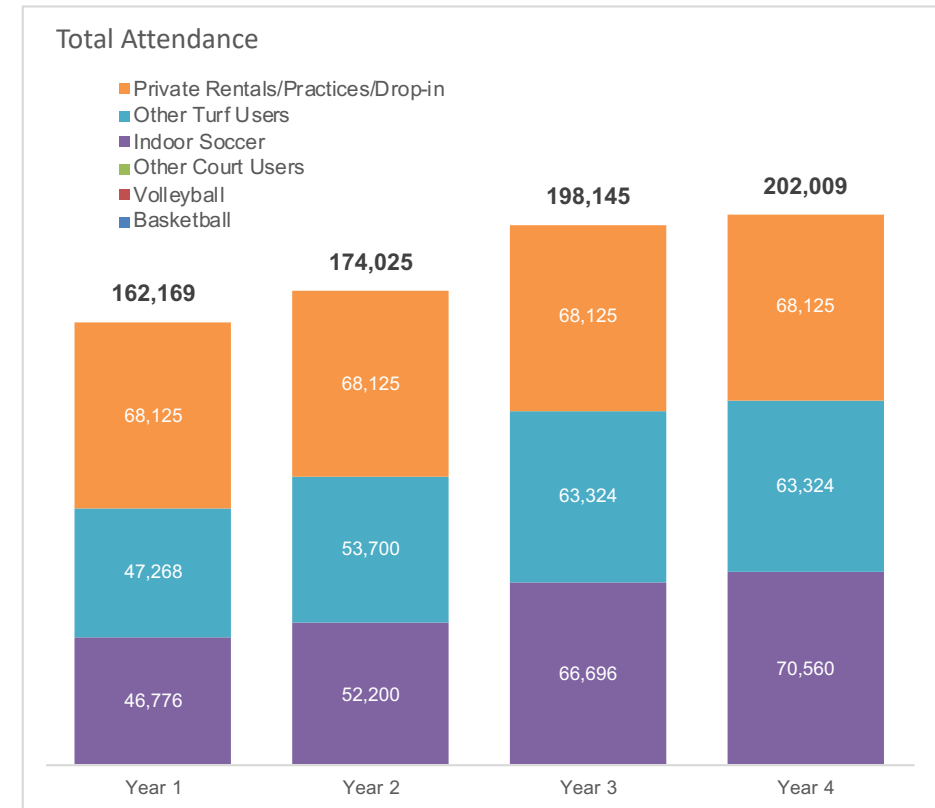
OPTION 1: Indoor Turf & Hardwood Facility



7. COST/BENEFIT: Estimated Attendance

ATTENDANCE	Opening Year 1	Year 2	Year 3	Stabilized Year 4	20-Year Cumulative
LEAGUES					
Basketball	0	0	0	0	0
Volleyball	0	0	0	0	0
Other Court Users	0	0	0	0	0
Indoor Soccer	6,384	7,056	7,728	8,064	142,128
Other Turf Users	7,560	8,232	8,568	8,568	152,880
Total	13,944	15,288	16,296	16,632	295,008
TOURNAMENTS					
Basketball	0	0	0	0	0
Volleyball	0	0	0	0	0
Other Court Users	0	0	0	0	0
Indoor Soccer	9,072	10,080	14,112	15,120	260,064
Other Turf Users	8,736	10,080	12,768	12,768	223,104
Total	17,808	20,160	26,880	27,888	483,168
CAMPS & OTHER RENTALS					
Basketball	0	0	0	0	0
Volleyball	0	0	0	0	0
Other Court Users	0	0	0	0	0
Indoor Soccer	2,400	2,880	3,360	3,360	59,040
Other Turf Users	1,440	1,920	2,400	2,400	41,760
Private Rentals/Practices/Drop-in	68,125	68,125	68,125	68,125	1,226,250
Total	71,965	72,925	73,885	73,885	1,327,050
SPECTATORS					
Basketball	0	0	0	0	0
Volleyball	0	0	0	0	0
Other Court Users	0	0	0	0	0
Indoor Soccer	28,920	32,184	41,496	44,016	762,840
Other Turf Users	29,532	33,468	39,588	39,588	696,408
Total	58,452	65,652	81,084	83,604	1,459,248
TOTAL ATTENDANCE					
Basketball	0	0	0	0	0
Volleyball	0	0	0	0	0
Other Court Users	0	0	0	0	0
Indoor Soccer	46,776	52,200	66,696	70,560	1,224,072
Other Turf Users	47,268	53,700	63,324	63,324	1,114,152
Private Rentals/Practices/Drop-in	68,125	68,125	68,125	68,125	1,226,250
Total	162,169	174,025	198,145	202,009	3,564,474

OPTION 2: Large Indoor Turf Facility



7. COST/BENEFIT: Estimated Financial Operations

OPTION 1: Indoor Turf & Hardwood Facility

FINANCIAL OPERATIONS	Opening Year 1	Year 2	Year 3	Stabilized Year 4	20-Year Cumulative	20-Year NPV
OPERATING REVENUES						
In-House League Registration	\$9,500	\$9,700	\$10,000	\$10,200	\$220,700	\$139,137
In-House Tournament Registration	\$33,072	\$34,080	\$47,232	\$48,684	\$1,019,868	\$637,203
Rental Income	\$386,400	\$445,400	\$527,300	\$569,000	\$11,929,700	\$7,463,293
Camps/Clinics	\$99,800	\$118,800	\$159,100	\$163,800	\$3,415,000	\$2,132,110
Concessions	\$288,000	\$333,600	\$428,900	\$463,200	\$9,665,900	\$6,030,414
Advertising/Sponsorship	\$90,400	\$93,200	\$95,900	\$98,800	\$2,117,400	\$1,334,650
Other	\$53,856	\$57,222	\$60,614	\$64,032	\$1,362,623	\$856,673
Subtotal	\$961,028	\$1,092,002	\$1,329,046	\$1,417,716	\$29,731,191	\$18,593,480
OPERATING EXPENSES						
Salaries, Wages and Benefits	\$462,000	\$477,800	\$493,900	\$510,500	\$10,928,200	\$6,885,939
Utilities	\$244,600	\$251,900	\$259,500	\$267,300	\$5,727,200	\$3,610,020
Maintenance and Repair	\$111,200	\$114,500	\$118,000	\$121,500	\$2,603,300	\$1,640,939
Materials and Supplies	\$55,600	\$57,300	\$59,000	\$60,700	\$1,301,700	\$820,507
Insurance	\$122,300	\$126,000	\$129,700	\$133,600	\$2,863,600	\$1,805,008
Concessions	\$187,200	\$216,800	\$278,800	\$301,100	\$6,282,700	\$3,919,676
General and Administrative	\$85,000	\$90,000	\$95,000	\$100,000	\$2,130,100	\$1,339,608
Tournament Expenses	\$13,229	\$13,632	\$18,893	\$19,474	\$407,947	\$254,881
League Operations/Programming	\$65,600	\$77,100	\$101,500	\$104,400	\$2,181,600	\$1,362,890
Subtotal	\$1,346,729	\$1,425,032	\$1,554,293	\$1,618,574	\$34,426,347	\$21,639,468
NET OPERATING INCOME	(\$385,700)	(\$333,030)	(\$225,247)	(\$200,857)	(\$4,695,156)	(\$3,045,988)


7. COST/BENEFIT: Estimated Financial Operations

OPTION 2: Large Indoor Turf Facility

FINANCIAL OPERATIONS	Opening Year 1	Year 2	Year 3	Stabilized Year 4	20-Year Cumulative	20-Year NPV
OPERATING REVENUES						
In-House League Registration	\$16,100	\$16,500	\$16,900	\$17,300	\$375,100	\$236,439
In-House Tournament Registration	\$13,568	\$13,984	\$25,200	\$25,984	\$536,200	\$332,955
Rental Income	\$573,200	\$622,800	\$682,800	\$715,900	\$15,187,700	\$9,539,921
Camps/Clinics	\$81,900	\$105,600	\$130,600	\$134,400	\$2,810,100	\$1,756,331
Concessions	\$215,700	\$245,500	\$301,700	\$318,900	\$6,693,300	\$4,185,431
Advertising/Sponsorship	\$83,300	\$85,800	\$88,400	\$91,000	\$1,949,900	\$1,229,087
Other	\$48,856	\$52,222	\$55,614	\$59,032	\$1,254,628	\$788,399
Subtotal	\$1,032,624	\$1,142,406	\$1,301,214	\$1,362,516	\$28,806,928	\$18,068,563
OPERATING EXPENSES						
Salaries, Wages and Benefits	\$423,800	\$438,400	\$453,500	\$468,900	\$10,037,100	\$6,324,152
Utilities	\$249,600	\$257,100	\$264,800	\$272,800	\$5,845,000	\$3,684,261
Maintenance and Repair	\$127,600	\$131,400	\$135,400	\$139,400	\$2,987,500	\$1,883,110
Materials and Supplies	\$66,600	\$68,600	\$70,600	\$72,700	\$1,558,700	\$982,507
Insurance	\$122,000	\$125,700	\$129,500	\$133,400	\$2,857,400	\$1,801,127
Concessions	\$140,200	\$159,600	\$196,100	\$207,300	\$4,350,900	\$2,720,705
General and Administrative	\$85,000	\$90,000	\$95,000	\$100,000	\$2,130,100	\$1,339,608
Tournament Expenses	\$5,427	\$5,594	\$10,080	\$10,394	\$214,480	\$133,182
League Operations/Programming	\$58,800	\$73,300	\$88,500	\$91,000	\$1,911,100	\$1,195,654
Subtotal	\$1,279,027	\$1,349,694	\$1,443,480	\$1,495,894	\$31,892,280	\$20,064,307
NET OPERATING INCOME	(\$246,403)	(\$207,287)	(\$142,266)	(\$133,377)	(\$3,085,352)	(\$1,995,744)

7. COST/BENEFIT: Economic Impact Concepts

A) Construction (one-time)



Construction materials, labor, design and professional fees, and other soft cost spending are generated during the planning and construction of the subject facility.

1. Direct Spending

- Materials
- Labor

2. Indirect & Induced Spending

3. Output (direct + indirect + induced spending)

4. Employment (full & part-time jobs)

5. Earnings (personal income)

6. Tax Revenue

- Sales & use taxes

B) In-Facility (ongoing)



Direct spending is generated through the operations of the subject facility (represented through operating revenues) driven by events and patronage. This spending occurs with respect to both event and non-event items, such as rentals, admissions, food and beverage, merchandise, sponsorship and advertising, education, and retail leases.

1. Direct Spending

- Room & Space Rentals
- Food & Beverage
- Retail & Merchandise
- Entertainment
- Sponsorship & Advertising
- Contract & Other Services

2. Indirect & Induced Spending

3. Output (direct + indirect + induced spending)

4. Employment (full & part-time jobs)

5. Earnings (personal income)

6. Tax Revenue

- Sales & use taxes
- Excise, gaming & other taxes

C) Out-of-Facility (ongoing)



Outside the subject facility itself, additional direct spending is generated in city, county and regional areas by visitors, spectators, attendees, participants, event staff, and exhibitors on lodging, food and beverages, retail, entertainment, transportation, etc. in connection with their visit to the area.

1. Direct Spending

- Lodging
- Restaurants/Bars
- Retail
- Entertainment/Gaming
- Transit
- Services/Other

2. Indirect & Induced Spending

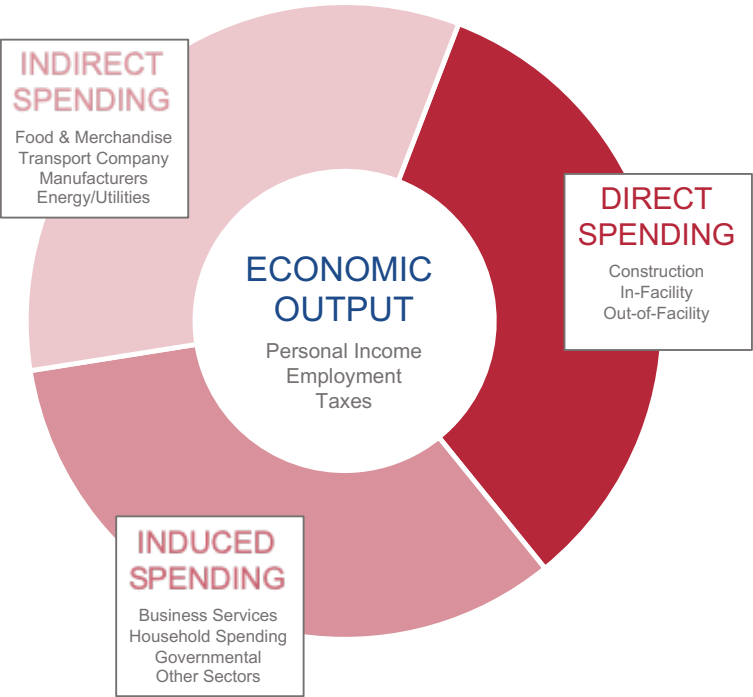
3. Output (direct + indirect + induced spending)

4. Employment (full & part-time jobs)

5. Earnings (personal income)

6. Tax Revenue

- Lodging taxes
- Sales & use taxes
- Car rental & transit taxes
- Excise, gaming & other taxes



7.

COST/ BENEFIT:

Economic Impacts (By Impact Type)

OPTION 1: Indoor Turf & Hardwood Facility

ECONOMIC IMPACT	Opening Year 1	Year 2	Year 3	Stabilized Year 4	20-Year Cumulative	20-Year NPV
A) Construction Impacts						
Net New Hotel Room Nights	0	0	0	0	0	-
Total Attendee Days	0	0	0	0	0	-
Net New Non Local Visitor Days	0	0	0	0	0	-
Direct Spending	\$0	\$0	\$0	\$0	\$13,730,188	\$12,948,217
Indirect/Induced Spending	<u>\$0</u>	<u>\$0</u>	<u>\$0</u>	<u>\$0</u>	<u>\$9,427,396</u>	<u>\$8,890,481</u>
Economic Output	\$0	\$0	\$0	\$0	\$23,157,583	\$21,838,697
Personal Income	\$0	\$0	\$0	\$0	\$7,798,369	\$7,354,231
Employment (full & part-time jobs)	0	0	0	0	164	-
B) In-Facility Impacts						
Net New Hotel Room Nights	0	0	0	0	0	-
Total Attendee Days	0	0	0	0	0	-
Net New Non Local Visitor Days	0	0	0	0	0	-
Direct Spending	\$576,617	\$655,201	\$797,428	\$850,630	\$17,838,715	\$11,156,088
Indirect/Induced Spending	<u>\$396,271</u>	<u>\$450,318</u>	<u>\$548,217</u>	<u>\$584,829</u>	<u>\$12,264,248</u>	<u>\$7,669,799</u>
Economic Output	\$972,888	\$1,105,519	\$1,345,644	\$1,435,459	\$30,102,963	\$18,825,887
Personal Income	\$411,703	\$467,558	\$568,135	\$605,811	\$12,706,501	\$7,947,053
Employment (full & part-time jobs)	14	15	19	20	418	-
C) Out-of-Facility Impacts						
Net New Hotel Room Nights	7,574	8,408	10,976	11,532	199,941	-
Total Attendee Days	170,131	188,947	231,065	241,325	4,210,018	-
Net New Non Local Visitor Days	58,911	65,396	85,372	89,694	1,555,095	-
Direct Spending	\$5,212,423	\$5,959,751	\$8,013,662	\$8,671,962	\$180,474,916	\$112,479,248
Indirect/Induced Spending	<u>\$3,567,921</u>	<u>\$4,079,469</u>	<u>\$5,485,378</u>	<u>\$5,935,987</u>	<u>\$123,535,675</u>	<u>\$76,992,416</u>
Economic Output	\$8,780,344	\$10,039,219	\$13,499,041	\$14,607,949	\$304,010,592	\$189,471,665
Personal Income	\$3,598,002	\$4,113,863	\$5,531,626	\$5,986,033	\$124,577,205	\$77,641,540
Employment (full & part-time jobs)	114	130	175	189	3,932	-

7.

COST/ BENEFIT:

Economic Impacts (By Impact Type)

OPTION 2: Large Indoor Turf Facility

ECONOMIC IMPACT	Opening Year 1	Year 2	Year 3	Stabilized Year 4	20-Year Cumulative	20-Year NPV
A) Construction Impacts						
Net New Hotel Room Nights	0	0	0	0	0	-
Total Attendee Days	0	0	0	0	0	-
Net New Non Local Visitor Days	0	0	0	0	0	-
Direct Spending	\$0	\$0	\$0	\$0	\$13,295,000	\$12,537,814
Indirect/Induced Spending	<u>\$0</u>	<u>\$0</u>	<u>\$0</u>	<u>\$0</u>	<u>\$9,128,588</u>	<u>\$8,608,691</u>
Economic Output	\$0	\$0	\$0	\$0	\$22,423,588	\$21,146,505
Personal Income	\$0	\$0	\$0	\$0	\$7,551,195	\$7,121,134
Employment (full & part-time jobs)	0	0	0	0	159	-
B) In-Facility Impacts						
Net New Hotel Room Nights	0	0	0	0	0	-
Total Attendee Days	0	0	0	0	0	-
Net New Non Local Visitor Days	0	0	0	0	0	-
Direct Spending	\$619,575	\$685,444	\$780,728	\$817,510	\$17,284,157	\$10,841,138
Indirect/Induced Spending	<u>\$425,188</u>	<u>\$470,435</u>	<u>\$535,974</u>	<u>\$561,244</u>	<u>\$11,865,750</u>	<u>\$7,442,469</u>
Economic Output	\$1,044,763	\$1,155,879	\$1,316,702	\$1,378,753	\$29,149,907	\$18,283,607
Personal Income	\$446,131	\$493,286	\$560,974	\$587,283	\$12,418,555	\$7,789,800
Employment (full & part-time jobs)	15	17	19	20	416	-
C) Out-of-Facility Impacts						
Net New Hotel Room Nights	5,871	6,458	7,980	8,211	143,473	-
Total Attendee Days	162,169	174,025	198,145	202,009	3,564,474	-
Net New Non Local Visitor Days	45,665	50,228	62,067	63,863	1,115,903	-
Direct Spending	\$4,040,385	\$4,577,439	\$5,826,105	\$6,174,484	\$129,282,618	\$80,762,872
Indirect/Induced Spending	<u>\$2,765,657</u>	<u>\$3,133,272</u>	<u>\$3,987,988</u>	<u>\$4,226,454</u>	<u>\$88,494,378</u>	<u>\$55,282,452</u>
Economic Output	\$6,806,042	\$7,710,710	\$9,814,094	\$10,400,938	\$217,776,995	\$136,045,325
Personal Income	\$2,788,974	\$3,159,688	\$4,021,611	\$4,262,088	\$89,240,474	\$55,748,539
Employment (full & part-time jobs)	88	100	127	135	2,816	-

7.

COST/ BENEFIT:

Economic Impacts (Overall)

OPTION 1: Indoor Turf & Hardwood Facility

ECONOMIC IMPACT	Opening Year 1	Year 2	Year 3	Stabilized Year 4	20-Year Cumulative	20-Year NPV
TOTAL NET NEW IMPACTS						
Net New Hotel Room Nights	7,574	8,408	10,976	11,532	199,941	-
Total Attendee Days	170,131	188,947	231,065	241,325	4,210,018	-
Net New Non Local Visitor Days	58,911	65,396	85,372	89,694	1,555,095	-
Direct Spending	\$5,789,040	\$6,614,952	\$8,811,090	\$9,522,592	\$212,043,818	\$136,583,553
Indirect/Induced Spending	<u>\$3,964,192</u>	<u>\$4,529,786</u>	<u>\$6,033,595</u>	<u>\$6,520,816</u>	<u>\$145,227,319</u>	<u>\$93,552,696</u>
Economic Output	\$9,753,232	\$11,144,738	\$14,844,685	\$16,043,408	\$357,271,138	\$230,136,249
Personal Income	\$4,009,705	\$4,581,420	\$6,099,760	\$6,591,844	\$145,082,075	\$92,942,824
Employment (full & part-time jobs)	127	145	193	209	4,514	-

OPTION 2: Large Indoor Turf Facility

ECONOMIC IMPACT	Opening Year 1	Year 2	Year 3	Stabilized Year 4	20-Year Cumulative	20-Year NPV
TOTAL NET NEW IMPACTS						
Net New Hotel Room Nights	5,871	6,458	7,980	8,211	143,473	-
Total Attendee Days	162,169	174,025	198,145	202,009	3,564,474	-
Net New Non Local Visitor Days	45,665	50,228	62,067	63,863	1,115,903	-
Direct Spending	\$4,659,960	\$5,262,882	\$6,606,834	\$6,991,993	\$159,861,774	\$104,141,824
Indirect/Induced Spending	<u>\$3,190,845</u>	<u>\$3,603,707</u>	<u>\$4,523,962</u>	<u>\$4,787,698</u>	<u>\$109,488,716</u>	<u>\$71,333,612</u>
Economic Output	\$7,850,805	\$8,866,590	\$11,130,796	\$11,779,691	\$269,350,490	\$175,475,436
Personal Income	\$3,235,106	\$3,652,974	\$4,582,585	\$4,849,370	\$109,210,224	\$70,659,473
Employment (full & part-time jobs)	103	116	146	154	3,391	-

7. COST/BENEFIT: Summary of Performance Projections

OPTION 1: Indoor Turf & Hardwood Facility						OPTION 2: Large Indoor Turf Facility					
	Opening Year 1	Year 2	Year 3	Stabilized Year 4	20-Year Cumulative		Opening Year 1	Year 2	Year 3	Stabilized Year 4	20-Year Cumulative
UTILIZATION											
League Teams	116	134	148	155	2,723		83	91	97	99	1,756
League Games	1,736	2,012	2,224	2,334	40,982		1,162	1,274	1,358	1,386	24,584
Tournaments	38	44	59	63	1,086		29	34	42	44	765
Tournament Games	1,740	1,932	2,664	2,808	48,456		1,272	1,440	1,920	1,992	34,512
Camps & Other Rentals	1,108	1,126	1,162	1,162	20,826		2,296	2,320	2,344	2,344	42,120
ATTENDANCE											
Leagues	22,624	26,320	29,120	30,632	537,544		13,944	15,288	16,296	16,632	295,008
Tournaments	26,592	29,424	40,320	42,480	733,536		17,808	20,160	26,880	27,888	483,168
Camps & Other Rentals	31,455	32,175	33,795	33,795	604,350		71,965	72,925	73,885	73,885	1,327,050
Spectators	89,460	101,028	127,830	134,418	2,334,588		58,452	65,652	81,084	83,604	1,459,248
Total Attendance	170,131	188,947	231,065	241,325	4,210,018		162,169	174,025	198,145	202,009	3,564,474
FINANCIAL OPERATIONS											
Operating Revenue	\$961,028	\$1,092,002	\$1,329,046	\$1,417,716	\$29,731,191		\$1,032,624	\$1,142,406	\$1,301,214	\$1,362,516	\$28,806,928
Operating Expenses	\$1,346,729	\$1,425,032	\$1,554,293	\$1,618,574	\$34,426,347		\$1,279,027	\$1,349,694	\$1,443,480	\$1,495,894	\$31,892,280
Net Operating Income	(\$385,700)	(\$333,030)	(\$225,247)	(\$200,857)	(\$4,695,156)		(\$246,403)	(\$207,287)	(\$142,266)	(\$133,377)	(\$3,085,352)
ECONOMIC IMPACTS											
Net New Hotel Room Nights	7,574	8,408	10,976	11,532	199,941		5,871	6,458	7,980	8,211	143,473
Net New Non Local Visitor Days	58,911	65,396	85,372	89,694	1,555,095		45,665	50,228	62,067	63,863	1,115,903
Direct Spending	\$5,789,040	\$6,614,952	\$8,811,090	\$9,522,592	\$198,313,631		\$4,659,960	\$5,262,882	\$6,606,834	\$6,991,993	\$146,566,774
Indirect/Induced Spending	\$3,964,192	\$4,529,786	\$6,033,595	\$6,520,816	\$135,799,923		\$3,190,845	\$3,603,707	\$4,523,962	\$4,787,698	\$100,360,128
Economic Output	\$9,753,232	\$11,144,738	\$14,844,685	\$16,043,408	\$334,113,554		\$7,850,805	\$8,866,590	\$11,130,796	\$11,779,691	\$246,926,902
Personal Income	\$4,009,705	\$4,581,420	\$6,099,760	\$6,591,844	\$137,283,706		\$3,235,106	\$3,652,974	\$4,582,585	\$4,849,370	\$101,659,029
Employment (full & part-time jobs)	127	145	193	209	4,350		103	116	146	154	3,232

7. COST/BENEFIT: Conclusions

- Unmet market demand exists to support a new indoor amateur sports facility product in Batavia. Study results suggest either a combination indoor turf plus hardwood complex or a full indoor turf facility.
- Falleti Arena has long-served as a productive community asset:
 - Estimated annual use hours = **1,600**
 - Estimated annual attendance = **68,500**
 - Estimated annual economic output = **\$2.3 million**
- Sufficient market demand does not exist to support a second sheet of ice; however, significant repair and improvements are recommended for Falleti Arena in order to elevate the physical product closer to industry standards and protect its ability to serve as a safe and productive asset for the community.
- The Creek Park Area would represent a logical location of a new indoor sports facility product. It has good proximity to downtown Batavia, can leverage Falleti Arena, exists in an Opportunity Zone, and fits in well with the City's economic development strategy and the Creek Area Master Plan.

- Cost/benefit estimates associated with recommended options:
 - Facility Option 1: Indoor Turf & Hardwood Facility
 - Estimated development cost = **\$27.5 million**
 - Annual attendance = **241,300**
 - Annual financial operating profit/(loss) = **(\$201,000)**
 - Annual economic output = **\$16.0 million**
 - Facility Option 2: Large Indoor Turf Facility
 - Estimated development cost = **\$26.6 million**
 - Annual attendance = **202,000**
 - Annual financial operating profit/(loss) = **(\$133,400)**
 - Annual economic output = **\$11.8 million**
 - Falleti Arena Improvements
 - Estimated renovation cost = **\$3.7 million to \$4.9 million**