



NATIONAL ASSOCIATION OF
SPORTS
COMMISSIONS

Market Analysis for Proposed Regional Recreational Facility

Prepared for All-Seasons Arena Board

Prepared by the National Association of Sports Commissions



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INTRODUCTION

This report is the result of an agreement between the All Seasons Arena Board (ASAB) and the National Association of Sports Commissions (NASC) dated June 18, 2013. The agreement calls for the NASC to perform a feasibility study concerning a possible regional recreational facility. This might consist of one or more complexes and could include a number of different sports, leisure and meeting facilities.

The overall purpose is to create beneficial impacts for residents. These impacts include but are not limited to: facilities that would better meet the recreational needs of residents *and* develop increased visitor spending from tournaments and events. This spending would assist in economic development for everyone in the region.

The study is to be conducted in two phases: a Market Study followed by a Financial Analysis. This is the Market Study. It will determine whether sufficient evidence exists of needs and benefits that, if addressed by the facility, would warrant proceeding to the financial analysis, where projections can be made of its potential economic viability.



The overall purpose is to provide actionable data permitting decisions on possible next steps.

Employees of the NASC have significant experience conducting studies of this kind. Please refer to *Appendix I – NASC Experience.*

A number of forums have been held over the past year. During these meetings representatives of several sports, the college and university, the Mankato YMCA, the cities of Mankato and North Mankato, Blue Earth County and others have discussed cooperative solutions to growing needs for additional space for recreation.

At the same time other worthy projects have surfaced including expansion of the Civic Center, a possible Southern Minnesota Children's Museum, a new project supporting VINE Faith in Action for seniors, and the completion of a fund raising campaign for the YMCA. Another coming issue will be the need for more school space to meet an expanding population.

It is also recognized communities throughout the state are adding to their financial burdens due to cut-backs in state funding.

This study, dealing as it does with present and future issues, is prepared and presented in light of these factors.





EXECUTIVE SUMMARY

This study concludes community needs do exist for the projects that have been considered so carefully over the past few years. Each can be justified in terms of unmet local needs...the most important measure of need. Funding is another matter. Whether funds to construct a bubble dome, YMCA joint use swimming pool, an additional sheet of ice, and/or indoor multiple courts for basketball, volleyball, tennis and the mat sports can be raised is another matter. The NASC did not find indications that public funding would be available to cover construction costs or years of potential operating shortfalls.

A financial analysis will be needed to help community leaders decide on the best paths to follow.

Adding an indoor track to a proposed multi-court building would raise construction and ongoing maintenance costs. The national championship track at MSU offers everything needed, but availability will always be an issue. An estimate of the higher costs could be part of the financials.

Our research did uncover the need for better infrastructure that will smooth and improve the flow of farm products to market.

The NASC has recently studied the costs of constructing 8 to 10 court indoor multi-sport complexes. Depending on the number of courts they can run between \$8 and \$12 million for a tournament friendly building.

We have also examined competition swimming venues (short courses) from a low of \$9 million to more than \$14 million, depending upon the footprint, number of permanent seats, additional meeting rooms, etc.

Each of these proposed facilities must compete with other worthy projects. The projects include the expansion of the Civic Center, The Southern Minnesota Children's Museum, a proposed new seniors program (VINE), and the probable need for additional classroom space. Additionally, the YMCA recently completed a fund raising campaign and could be challenged to launch another to support an aquatics

center. If the Civic Center is not expanded, the need for additional ice time would increase because the MSU women's team would remain at All-Seasons Arena.

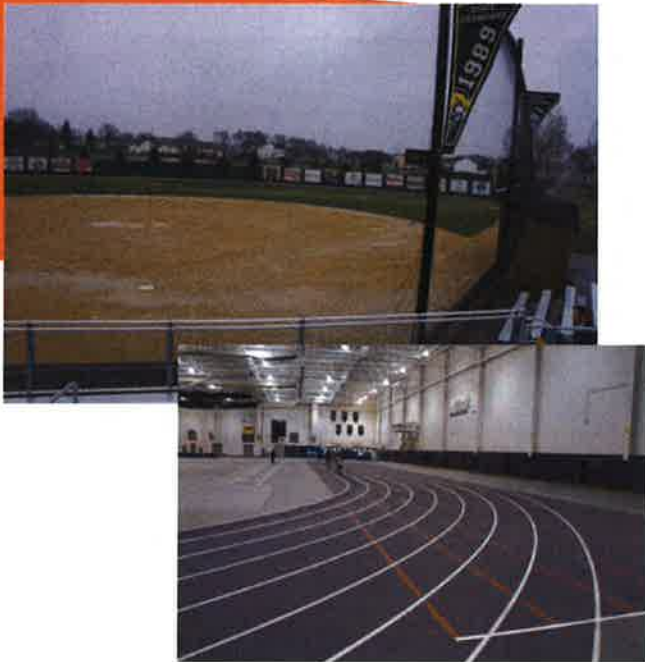
This study indicates the reasons why new facilities are constructed. They all begin with unmet local needs. As attractive as additional visitor spending can be, the cost/benefit relationship of facilities, operating shortfalls, and increased economic impact must be considered.



We are concluding that it is unlikely that a dome or a multi-court building, or an indoor tennis complex will cover expenses. Every one of these is needed. Each will contribute substantially to the quality of life and the viability of the sports served. It becomes a local issue as to how far to go in terms of additional study. We can only suggest that the rink and pool have the best opportunities to reach a sustainable level of operation.

Sustainability is a major issue in the development of sports facilities. The sports event travel market has received a good deal of positive publicity as a recession resistant industry. This attention is deserved. Our industry has continued to expand over the past ten and more years. Cities are recognizing the benefit of increased economic impact through sports. Attracting visiting teams and their families and friends does produce significant benefit, and this report describes how this occurs. It must also be based upon sports facilities that already exist or on those that can be built and afforded.

There is a boom underway in amateur sports facility development. Some of these projects are going to succeed and others will not. The ones with the best chance of success are those that have been the subject of a feasibility study conducted by individuals that do not have a stake in the outcome. This study is an example of such a process.



Our recommendation to proceed with a financial analysis of the pool and rink at the expense of other worthy projects is also based upon not having a stake in the outcome. Reasonable people can disagree on whether we have shown sufficient evidence not to project financial performances for the courts, dome and tennis complex.

The study reviews all of the tournament quality sports facilities and indicates which are of particular importance. It also recommends continued bidding on outside events that can be hosted with what you have presently.

Another important recommendation is to expand the number of locally controlled events that attract visiting teams. This is obviously most effective for sports that are well served. Softball at Caswell Park is one example. The park has been a successful host of softball tournaments that are putting people in your hotels and restaurants. To the extent that more events can be created that use your existing facilities the better it is for everyone. Local clubs earn money, facility rentals are paid, and visitors leave behind dollars that circulate in your economy.

The new youth baseball complex at Rosa Parks School is an example of what can soon be accomplished with baseball. This is an excellent complex.

There are opportunities in youth soccer. The Mankato United Soccer Club has been an active participant in the development of new fields. Without their support far fewer fields would exist. Short sided games (6 on 6 or 8 on 8) can take place on multiple fields within the dimensions of a full size field. Certainly an indoor soccer practice facility would reward the hard work and dedication of the MUSC, and on that basis alone you may decide to request financial projections for a dome.

The NASC is pleased with this opportunity to provide information designed to permit good business decisions. Only you can know all of the factors at work. Our job has been to reflect what we have learned during our deliberations.

A complete analysis of whether or not each element of the complex becomes a reasonable community investment should resolve all of the thinking and planning that went into construction of the wish list for new sports facilities.



BACKGROUND

All Seasons Arena Board ~ feasibility study

As was mentioned in the introduction, a broad constituency has been meeting over the past year to consider recreational needs. This has been done to determine whether it would be possible to coordinate needs and wants into one or more new complexes. Our purpose is to provide information that will permit consideration of next steps in the process.

The NASC started by collecting as much data as possible on the recreational facilities in the area. To do so we toured most of the sports facilities. We also discussed these matters with a large number of stakeholders. All of the site visits and local interviews were conducted April 29 to May 2, 2013. Don Schumacher, Executive Director of the NASC conducted the interviews and site visits.

The schedule for the interviews and visits was developed by Visit Mankato. Interviews took place with elected officials from Mankato, North Mankato and Blue Earth County. We also met with a variety of other community leaders and a large number of local event organizers.



Visits were made to all but purely recreational sports facilities. Our focus was on those able to host tournaments that will attract visitors. Visitor spending produces income for area hotels, restaurants and businesses. This income, in turn is used to pay wages and taxes, purchase supplies, and to expand the workforce and further benefit the economy.

We also sought input on space and facility needs for community meetings, senior citizens programming, etc.

Results are included in the section titled Site Visits and Interviews. They formed the basis for all recommendations. The NASC conducted a significant amount of additional industry research, including a search for meaningful case histories that provide information useful to an analysis of the conclusions.



One of the most essential elements of any market study is identifying areas where residents are deprived of opportunities to participate in recreational activities. The usual factors include a lack of facilities, not enough facilities, or the wrong kind or poorly maintained or outdated facilities.

As the analysis progressed we found examples of all of these. It also became apparent some residents have been traveling significant distances, often in poor weather conditions, to access facilities sufficient to their needs.

We also uncovered a number of opinions on where to locate, how to raise necessary funds, and just what should be built and why. One purpose of this phase of the study is to present a unified series of suggestions based upon what appears to be the most productive combination(s).

Spirited discussions can take place on these topics, but there is no question about the need for exercise. This

can be low impact (walking) or higher impact (jogging and running). The degree of physical activity is further influenced by age: younger residents are likely to be more physically active than seniors, but seniors are doubtless concerned about their physical and mental well-being and that of their children and grandchildren.



Exercise is known to combat the most common health issues of today: obesity, high blood pressure, diabetes, and mental and physical disabilities. We know with certainty, as one example, that youngsters that eat well and exercise regularly learn better than their less active counterparts. The better they learn, the better prepared they are for later phases of their lives.

The NASC needed to know which facilities are used the most and why. We also needed to determine those that have contributed to the area economy by being suitable for events that attract visiting competitors, family and friends. It was also useful to identify areas where an additional field, court or pool might make a big difference when dealing with these issues.

Just as there is no question about the need for exercise, it is equally true that the sports event travel market has continued to expand despite the recession. Parents have shown their willingness to be certain

their children have the opportunity to compete, and they travel to make sure they do.

Our interviews were conducted to identify issues standing in the way of greater local participation. In every case, the issues relate to a lack of facilities or a lack of access to facilities at times convenient to participants. It is clearly not ideal to have young skaters arriving at home past 9:00pm on school nights. It is also unreasonable to think that adults can get along with late night practices or games.

Minnesota State University, Mankato completed in April, 2013 a feasibility study for a domed sports center. That study identified the importance of local users not affiliated with the university as crucial to the success of any such project. As of the date of this report the university has shelved further consideration of an on-campus dome. The reason cited was the need for between \$350,000 and \$500,000 in rentals and user fees that would need to come from MSU's athletic department and student body. This money would be in addition to pledges from other local users.

If a dome were to be funded by the public sector it would need to find ways to replace that portion of future uses by MSU that cannot be conducted off campus.

The largest external users who pledged to use time in the campus dome are the Mankato United Soccer Club, the Mankato Softball League, Minnesota Thunder Academy and the Mankato Area Public Schools. The fact these organizations were willing to commit to the project indicates the need for more space. In our experience there can be a difference between commitments made prior to construction and actual use in later years. Nonetheless, MSU has decided not to pursue the project at this time.



DEMOGRAPHIC CONSIDERATIONS

All Seasons Arena Board - feasibility study

The success of any project will be dependent in large measure on weekly use by the local and regional market. Mankato is the hub of a regional market. In our opinion the primary marketing area for sports facilities generally corresponds to the area served by the River Hills Mall. Using a 30 mile radius from the mall as a reasonable estimate of the distance users could regularly travel to sports facilities, there are presently about 168,000 people living within that radius. That number is expected to grow to about 171,000 in 2016 (source: Nielson PrimeLocation report).

The dome study estimates that just over 295,000 people live within 40 miles and growth is expected to more than 301,000 by 2017. The NASC turned to Sports Marketing Surveys USA (SMS) to develop custom data on the market. SMS is expert at projecting patterns of usage for sports equipment and participation rates for team and individual sports. Using the national data base of more than 40,000 panelists they projected the numbers of core participants by sport within 30, 60, and 90 minutes of drive time.

A core participant is defined as a person who plays a specific sport at least a minimum number of times each year. These rates differ by sport. Please refer to Appendix II below for a chart that indicates the minimum numbers for each of the sports covered in this study.

The sports selected are those our study determined to be the ones of most interest to residents. And, to attempt to be as conservative as possible, we asked for projections for core participants only. The annual frequency rates are included in the data that can be found in Appendix II – Sports Marketing Surveys USA Market Data.

One number that deserves mention can be found under ice hockey. The study estimated 315 core participants within 30 minutes. The total number is higher, because interest in the sport is so intense in Minnesota. Including casual participants increases dramatically the numbers for every sport.

Please note an index of 100 equals the national average. Core participants in hockey indexed at 82, well below the national average. When extending the radius to 90 minutes the weighted average rises to 132. Only fast pitch softball shows an average above the USA within 30 minutes, whereas all but one exceeded the average at 60 minutes.

We believe the combination of conservative projections and athletes that participate at very high rates during the year explain the data presented. As with any set of nationally weighted numbers there will be variances by city and state.

Patterns of usage vary depending upon time of day, day of week and seasonal considerations. More usage takes place in the early mornings, evenings, weekends, and when school is not in session. The lowest utilization is generally Monday through Friday between the hours of 9:00am and 4:00pm. During these off-peak times primary users are those not impacted by work and school schedules. Generally, these are seniors or adults.

Most complexes attract a mix of league play, workouts and practice sessions, open time and events. It is essential that there is significant demand for non-peak times. An ice hockey rink, for example, will be busy mornings and late afternoons and evenings and very busy from Friday through Sunday. This still leaves a large number of hours to fill. The same is true of basketball/volleyball courts and swimming pools.

Our focus during interviews was to reach judgments on the extent of possible demand by activity.

Demographic factors that can indicate favorable conditions

The NASC looks for indicators reflecting the age of the population, range of incomes, levels of education, employment, and whether population is growing, stable or decreasing. These same factors were considered in the dome study.

Please refer again to Appendix II. All of the sports studied scored well, and most were above national averages at 60 and 90 minutes. These results indicate why they are most popular and also why they are the ones represented by participants eager to assist in new facilities development.

In general, we believe the indicators are generally positive in terms of participation rates and the ability to afford hourly rentals, dues and fees. Whether income would be sufficient to support any combination of the facilities remains to be seen. The fact that Mankato-North Mankato is experiencing population and job growth is a significant positive marker.



SITE VISITS AND INTERVIEWS

All Seasons Arena Board ~ feasibility study

It was necessary for the NASC to conduct an audit of existing tournament quality sports facilities. This was done to understand what exists and what the usage patterns are for local events and those bringing visitors to the community. We also conducted a lengthy series of interviews with public officials from the county and two cities and a wide variety of athletic directors, facility managers, youth sports leaders (club and league officials), and volunteers.

The visits and interviews allowed us to construct a picture of strengths in particular, with an accompanying emphasis on unmet local needs. The MSU dome study is an example of the information uncovered. That study was undertaken primarily because of unmet needs from the university community. It also makes clear the importance to the project of outside uses. If this project ever does happen, it will do so in part due to commitments from people and organizations we interviewed. So, any suggestions the NASC will make must take these possibilities into account.

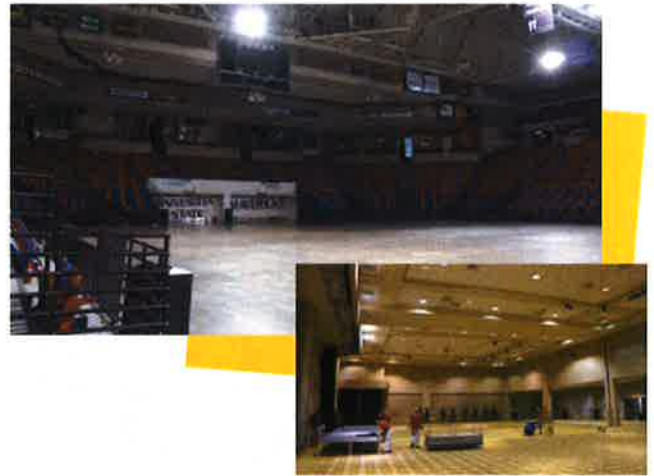
We will begin with a review of current sites and conclude the section with the results of our interviews. The sites are addressed in the order of our visits.

Please note: The existence in the market of excellent tournament facilities is not the same as access to them.

SITE VISITS

Verizon Wireless Center

This is an impressive arena and convention center combination. The arena is a full-service sports and entertainment facility. It hosts a wide range of events including MSU hockey, family shows, concerts, and meetings, conventions, and trade shows. Please refer to Appendix II – Verizon Wireless Center for information and floor plans. Arenas of this type can also host basketball, volleyball, wrestling, gymnastics, tennis, and virtually all of the martial arts among other events.



The arena has a capacity of 8,300 in the full house configuration. It also has hockey and half house layouts to suit the event. Because there is also a meeting and convention center it is possible to combine some or all of the meeting space in support of an arena event or to stage events in the arena and meeting facilities simultaneously. The center is right-sized to the market as a regional entertainment, sports and meetings complex.

The building is in excellent condition. We understand there are plans to expand, and certainly that will result in an even more impressive and flexible combination of spaces.

Plans include moving the MSU Women's Hockey Team to the Verizon Wireless Center from All-Seasons Arena. This will provide the women's team with the same outstanding venue used by the men's team. It will also free up ice time previously needed at All-Seasons.

The NASC regards the arena and meeting combination as a major regional asset. It clearly draws people from 100 and more miles to enjoy concerts and special events.

Bethany Lutheran College

Bethany is an NCAA Division III school that competes in cross country, baseball, softball, soccer, track and field, basketball, volleyball (women), golf and tennis. Athletics are a clearly important part of the college experience at Bethany.



The facilities of particular interest are the baseball and softball fields and the two gymnasiums. All are tournament quality. Although the fields have only a small number of bleacher seats they have all of the features necessary for youth events, except for a lack of lighting. Tournament managers often prefer lighted fields. In the event of a rain delay or in the case of a large field of teams, lights provide an extra margin for make-up games.

The gymnasiums are in very good condition. They are perfect for youth basketball or volleyball. They are also suitable for the mats sports or gymnastics, although capacity can be an issue.

One issue that will come up is the fact that there are two basketball/volleyball courts and these would need to be combined with others at different locations. The single baseball and lone softball field also must be combined with others for any one event.

Many event managers do not want too much travel between sites. They prefer to play all the games in one multi-court or field complex. This requires less team travel and saves on officials and volunteers. This factor is the only drawback to the inclusion in a tournament of Bethany facilities.

Franklin Rogers Ballpark (The Frank)

"The Frank" is an excellent ballpark. It is the home of the Mankato MoonDogs of the Northwoods League. The league has teams in Minnesota, Wisconsin, Michigan, Iowa and Ontario. The park has a seating capacity of 1400 and is fully equipped for semi-professional baseball. It has all of the desired features on the field of play plus lights, scoreboard, complete concessions, restrooms and bullpens.

The dimensions are 315' to left, 383' to center, and 325' to right. These are sufficient for higher levels of play and perfect for high school and college games. It was built in 1967 and has hosted the MoonDogs since 1999. The Frank is a perfect site for the semifinals and championship of a tournament.

The ballpark is a major asset for the area.



Thomas Park

The park includes a high school varsity baseball field that is lighted and fully equipped for tournament play. It also contains four more fields with skinned (dirt surface) infields that are suitable for softball or youth baseball. One of these fields is lighted and has larger dimensions for adult softball (slow pitch).

East High School uses the grass infield, lighted baseball field for its home games.



The park also includes an outdoor lighted hockey rink, permanent restrooms and concessions and paved parking (64 spaces).

As far as tournaments are concerned the baseball field and the larger softball field are used. The softball field can be combined with those at Jaycee Park to host larger events.

This is a very nice park located on Mankato's East Side.

Jaycee Park



This is Mankato's primary site for softball. There are three fully equipped and lighted fields that include some bleacher seating. Because all fields are lighted they are of particular interest. Event managers like the flexibility provided by lighting. Rain delays may require play into the late evening and this is not a problem with these fields.



The park has a picnic pavilion, picnic facilities and playground equipment. These can be real plusses when the family comes out to see a family member play.

There is off street parking for 132 cars.

Rosa Parks

This is a brand new outstanding youth baseball complex with five fully equipped and lighted tournament quality fields. We were very impressed with the quality of each element of the complex. It is apparent that much planning went into its design and construction.



The complex is adjacent to Rosa Parks Elementary School.

A central building provides restroom and concession facilities.

Each of the fields has a grass infield. This provides an excellent playing experience, mirroring as it does varsity and collegiate fields.

These five fields are ready for every use: local, regional or national.

Land of Memories and Sibley Parks

Both of these older parks are exceptional public recreational sites. Sibley does have three diamonds, but they are not equipped for tournament play. Sibley's diamonds have been used for events, but they would not be high on our list of alternative choices.

Tourtellote Park

This park includes the only 50 meter swimming pool in the area. It is an outdoor, seasonal pool. There is a separate diving well and a heated wading pool.

Pools of this kind are suitable for club competitions at the state level but are not intended for certified championship events of a more regional or national nature.

As a park district pool it has permanent concessions and restrooms and all of the amenities of the balance of the park.

As a recreational pool it performs very valuable services to the entire community.

University of Minnesota Mankato

MSU's campus includes some of the best sports facilities in the area. Some are excellent and compare well to those anywhere. The only element that does not meet minimum standards for competition is the swimming pool. We will have more to say later about the limitations of the pool and the potential a new pool could offer to MSU and Bethany College.



MSU Blakeslee Field

The football stadium is the summer home of the Minnesota Vikings. It is a very nice football stadium but there are very few events that need to be staged in a football only stadium with a grass playing surface. The highest and best use of specialized stadiums like this is for varsity play and Vikings camp.

MSU Baseball



The primary missing element is lights. Lighting one varsity field can be costly and we suspect the costs have prevented installation.

The playing field, dugouts and support facilities are very nice and maintained in very good condition. It is completely suitable for inclusion in a baseball tournament, and certainly meets the needs of the university.

MSU Softball Field

This is a mirror image of the baseball field in terms of its equipment, condition, and suitability for tournaments, including its lack of field lighting.



The two fields are served by an indoor batting and pitching facility which is convenient to both.

MSU Intramural softball fields

There are two lighted softball fields that have covered and protected dugouts, good quality infields and outfields. These are tournament ready fields that can be combined with those at, say, Thomas and Jaycee Parks (and Caswell, for that matter) for a larger event.



MSU Outdoor Track

This is a nine lane 400 meter track suitable for most outdoor events. It does not have lights, seating, or permanent structures for media. The surface itself is in good condition and, because it is in the center of the athletic fields, it is easy to reach from parking or anywhere on campus.

Field events are contested partly in the infield and partly adjacent to the track.

Although lacking in permanent amenities it does have nine lanes, one more than customary and a real plus for a meet with large numbers of competitors.

MSU Bresnan Arena

Bresnan is certainly an exceptional basketball and volleyball arena. It is extraordinarily well equipped, in excellent condition, and perfect as the centerpiece of a basketball or volleyball tournament. The Maverick basketball programs have flourished, with a Women's Basketball NCAA Division II National Championship in 2008-09 and a Men's NCAA Division II Final Four Appearance in 2011-12. This is the kind of record that attracts student athletes and makes the arena a place to be during the season.

This may be the single nicest sports facility in the area.



MSU Myers Field House



We expected to find a nice arena on campus. We were not prepared for Myers. The field house has a 200 meter 8 lane indoor track. It is unusual to find more than 6 lanes on an indoor track. Inside the track there are four courts for basketball or volleyball. The courts can be separated from each other and the track by divider curtains.

The track includes a straight-away for hurdles and dashes.

The floor surface is a rubberized composite material. This works well for track and volleyball and intramural basketball. Basketball tournaments prefer wooden floors, although many youth basketball events are happy to play on a composite surface.

With four floors in one building Myers becomes a perfect location for a youth volleyball event and it will also work with youngsters (12 and under) for basketball.

There are pull-out bleachers that seat several hundred spectators.

The field house has access to permanent concessions and restrooms. It is a perfect showplace for indoor track, particularly for high school competitors and their parents.

MSU Otto Recreation Center



Otto has three high quality wooden floors with dividers. Each court is equipped with its own scoring system. These are perfectly suited for use by tournaments.

Simply stated, this is a perfect three court basketball/volleyball facility that also has immediate access to concessions and restrooms. Although there is no permanent seating, most spectators at a youth event will stand or bring their own folding chairs.

MSU Schellberg Gymnasium

Two more wooden courts with dividers are in this gym. These, too, are perfect for youth basketball and volleyball.



It is possible to combine the courts in Myers, Otto, and Schellberg to have a total of 10 basketball or 12 volleyball courts. This is sufficient to hold the largest youth events available for bid. We realize scheduling will always be an issue, but feel it important to note these courts are almost next to each other, in as compact and compelling a package as we have seen anywhere, even including the four rubberized floors!

MSU also has racquetball courts and a six lane 25 yard swimming pool. Although the pool meets minimum standards for collegiate or high school short course competitions it is not a full service event specific pool. If an 8 lane 25 yard pool was available it is likely that swimming could flourish as a competition sport.

Important: Making the observation that MSU has enough courts to host many of the largest basketball and volleyball competitions (or wrestling and all of the martial arts) is not the same as booking them. Each campus has developed their facilities to meet the needs of intercollegiate athletic programs, intramural competition and practice sessions and use by students and faculty and other university sponsored events. This means having courts on campus and getting access for several days will require a great deal of notice and considerable planning. The NASC is aware this has proven difficult on campuses everywhere.

A multi-court facility that is not on a campus provides much greater opportunities for success. So, the MSU courts are a fact but are heavily scheduled, and having access to a new facility would prove useful to future events.

All-Seasons Arena

There are two ice surfaces. One meets North American standards (200' by 85') and the other meets international standards at 200' by 100'. The smaller rink is the current home of the MSU Mavericks Women's Hockey Team.



Between the two rinks, it is very difficult to find ice time. With figure skating and hockey programs from youngsters to adults both rinks are busy for at least five straight months each year. We will have a number of observations about this situation in the interviews section and in our conclusions.

It is common for adult hockey to be played past midnight.

The plan is for the women's hockey program to move to the Verizon Center assuming completion of planned improvements. The only real saving on ice time (that is, freeing up time for other programming) will be for games played in the evenings. Otherwise, practice time takes place during school hours when few skaters are available.

There are a total of 1200 permanent seats for the two ice sheets.

All-Seasons Arena is an excellent, well-maintained building.

Mankato Curling Club

Although modest in scope, the curling club has five sheets, which many experts regard as the perfect number for most events. The club does host events that attract visitors. Some are national events, and these are taking place through the efforts of the club without much community support.

There are more than 200 adults and 100 youngsters engaged in the sport locally.



The NASC is impressed with the accomplishments of the club. There is no reason why more and bigger events could be hosted using these sheets and still more at All-Seasons or Verizon, depending on the scale of the competition.

Caswell Park

Caswell has five lighted and fully equipped softball fields. This is the premier softball facility in the area and hosts large numbers of events each year.

Each field has electronic scoring, covered and protected dugouts and permanent bleacher seating. There is a scoring and public address tower for each field, as well.

Between the five fields there are seats for 1,700 plus space on the upper mezzanine level.



These fields work equally well for fast and slow pitch. The fast pitch game requires shorter outfield fences, and these are available. They also have different dimensions for the bases and the pitcher's rubber. The park includes permanent concessions and restrooms and a playground. The park has its own parking.

Caswell compares to the nicest five field complexes anywhere. It is certainly the preferred site in the area. The park has hosted numerous state regional and national tournaments since its opening in 1987, including this summer (2013).

Discussion has taken place regarding two additional fields. We understand the plan is currently on hold. The addition of these fields would provide even more potential for staging large softball competitions that will attract large numbers of visitors.

Caswell Park North

Located across the street from the softball complex, this park has rectangular fields primarily for soccer. The Mankato United Soccer Club (MUSC) and the City of North Mankato have collaborated on its development. The club contributed a substantial amount to insure the complex would include a lighted field, irrigation for all fields, and fencing to protect the turf from unauthorized use.

Irrigation is an exceptionally important feature of tournament quality fields. The ability to add water when needed can assist greatly in preserving natural turf during heavy use.

Three full size fields have been built. These can be used for one game at a time or for two or three games on each large field at a time, depending upon the age level and number of players on a side.

This is a primary site for the MUSC, and combines well with Dakota Meadows.

Dakota Meadows Middle School

MUSC assisted in the development of four full size irrigated soccer fields. These, too, are broken into the size and number of fields required. They are also adjoining Caswell North.

With just the seven full size fields on these adjoining properties, and assuming three fields on each large field, a total of 21 games could be taking place at the same time.

Perhaps as significant, shorter side games also take no more than an hour. This results in maximum play and the potential for large numbers of teams and visitors.

Thomas O. Anderson Fields

Here again, the MUSC has assisted in the development and maintenance of three more full size, irrigated fields. Although in Mankato, the distance between Caswell/Dakota Meadows and Anderson is not great enough to discourage travel between sites on the same tournament day. Using the example above, this site would add nine more games at the same time, for a total of 30...more than enough for a large event (100 teams).

Short sided games are usually played by the youngest players. Players ten and under traveling to events are accompanied by more family and friends than older players. And, more people travel with girls than boys.

Please see Appendix IV – Girls Sports Pack Economic Punch for some of the reasons.

It should be very clear that the Mankato United Soccer Club is playing a major role in seeing to it that appropriate playing fields are available.

Taylor Family Aquatic Center, Mankato Family YMCA

There are two different pools in the YMCA. One is a four lane lap pool and the other a three lane lap pool. They are not intended for competitive events due to the way they were designed. The Y has about 140 children enrolled in its swimming program.

The YMCA also has two gymnasiums with a total of four courts. These are heavily used for internal programming. They are suitable for inclusion in youth tournaments if scheduling issues, which are always a major issue with YMCAs everywhere, can be overcome.

INTERVIEWS

The NASC was able to spend a significant amount of time talking with community leaders from the public and private sectors, managers of sports facilities, and officials and volunteers from all of the sports popular in the region. We believe we were able to assemble an accurate impression of the issues facing everyone: unmet local facility needs, a lack of public funding, the potential for additional events, and the impact on local programming and the economy that could be realized through the addition of new facilities.

Our research also uncovered other worthy community projects, as noted in the introduction.

The following list of comments provides context for the recommendations to come.

General Comments

We have arranged comments into those that are general in nature and then by sport. In some cases, like the lack of fields or courts that cause games and practices to take place too seldom or at inconvenient times or places, several sports face the same problems.

- Decisions are needed on whether the County Fair should move to a new site in Mankato.
- The major issue we face is a lack of facilities.
- Each community needs to benefit; not everything should go in one place.
- Mankato is growing steadily to the East.
- Farmers are rightly more concerned about getting supplies they need and their produce to market. Bigger and bigger equipment requires wider bridges and stronger roads. It might be nice to have more sports facilities but these more rural issues are crucial to the economy.
- We need more community rooms for meetings.
- We are “a kid and grand-kid focused” community.
- The idea of a sports complex has brought together competing factions.
- The area is leading the state economically. We have a great story to tell. Business is strong, and there is economic vitality.
- The All-Seasons Arena Board provides the structure for a possible project.
- Where does this project rank when core services have been reduced?
- The All-Seasons Board is not anxious to assume responsibilities for ongoing costs.
- Cities may see direct gains through visitor spending. County might ultimately see increased property values...much longer payoff.
- The MSU Bubble Study might result in a structure that can meet some of the needs identified.
- There is no recovery time for grass playing fields. They are used constantly.

- Courts (gym floors) are in constant use and more space is needed.
- The Twin Cities and Rochester have what we would like to have.
- Outside uses of school facilities are scheduled through the Community Services Recreation Department.
- We had a record number of rain-outs in the spring of this year.
- Would the YMCA be involved? They have operational expertise.
- Where quality of life is involved, deficits will occur.
- We want a safe, quiet community.
- Mankato is growing. Larger kindergarten classes each year. Growth appears permanent.
- If youngsters cannot get on courts, ice or fields they lose interest.
- Adults are playing past midnight.

Ice Hockey

The hockey community is well organized. And, as is the case with soccer, they have made and are willing to make substantial financial investments in their sport. The Mankato Area Hockey Association (MAHA) is hosting 7 tournaments in the coming season.

Like any other sport, the size of events is determined in part by available, appropriate facilities. These same availabilities affect every aspect of youth and adult hockey programs: practice time, league play and tournaments. All Seasons Arena and its two sheets of ice are needed by everyone, including the figure skating community.

- USA Hockey, the national governing body for the sport, has established recommended amounts of practice times for the sport by age.
- MAHA is currently unable to meet the standard ice time requirements for its teams by 258 to 568 hours. Please refer to Appendix V – MAHA Participation Data.
- The addition of the second rink at All Seasons

caused circulation issues. Everyone must go the rear of the building to cross between rinks.

- The rinks are used for MAHA, the MSU Women's program, two area high schools, figure skating and open skating, among others.
- Practice sessions often take place at sites more than thirty minutes away from town.
- Recently, 12 year old players have been arriving home from practice at 10:00pm on school nights.
- Although 7 tournaments are on the schedule, only a few teams will be accepted because these events require even more ice time.
- Most users prefer the older, North American Standard rink
- MAHA has prepared a proposal for the construction of a new rink. Please see Appendix VI – MAHA Proposal for information.
- MAHA and All Seasons management have determined that even after the MSU Women's program leaves the building another sheet, if built, will fill to capacity in its first year.
- All Seasons management has determined a third sheet will fill up and a fourth would provide for future growth.
- Management feels the third sheet will be able to support itself.
- MAHA is offering to contribute about thirty percent of the estimated cost of \$3 million. It must be noted that perhaps 75% of this commitment would be raised through private sources, so the full third is not guaranteed at this time.

Soccer

The Mankato United Soccer Club has contributed substantial amounts of money to increase the number of soccer fields in North Mankato in particular (Caswell and Dakota Meadows) and also in Mankato (Anderson Fields). MUSC also assists Bethany College with its fields.

- It can be difficult to invest in fields and care for them and also recover from their use by outsiders who do not pay rental or share in costs of upkeep.
- Additional facilities could provide places for these participants.

- Turf fields have been considered due to their ability to withstand heavy use, including during inclement weather.
- Land of Memories Park fields are in poor condition and actually unsafe for use (too rough, bumpy).
- MUSC is experiencing steady growth in its membership. There are about 1300 players at this time, and the program grows by about 50 participants a year.
- There are no indoor facilities for practice and play in the winter.
- There is currently no adult league.
- Tournament use consumes large amounts of field time. They must be fund raisers for MUSC.
- Without the MUSC, soccer would not be able to survive in the market.
- The MUSC pledged about \$68,000 in field time to the MSU dome study.

Swimming

There are no suitable competition pools in the region. Only MSU has more than four lanes, and that pool does not accommodate the needs of swimming competitions of any size. It is suitable for small college and high school meets, but nothing else.

The Mankato Family YMCA has two small pools for recreational or therapeutic purposes.

Mankato East and West High Schools have pools. They are not in competition friendly condition.

The Tourtellote Park pool is a seasonal 50 meter outdoor pool used primarily for recreation.

- Currently, local swimmers must travel to Rochester, St. Thomas, Apple Valley or the Twin Cities for meets and even practice.
- The YMCA is unable to offer the kind of competitive programs it would like.
- There are only 140 kids in the current swimming program.
- The Near West Side location does not favor extensive use by persons outside downtown,

including those who wish to swim during their lunch break.

- The YMCA may need to expand to the East Side in the next five years.
- Minimum needs for a pool in the new facility would include a 25 yard 8 lane pool with a diving well, sufficient deck space, permanent seating for about 500, locker rooms, and a life center with exercise equipment.
- A pool of this description would meet the needs for what is termed a short course. There are short (25 yards) and long (50 meters) courses. The latter are much more costly to build and maintain. There are also more swimmers practicing and competing at 25 yards.
- The relative lack of pools within a reasonable distance causes much travel for practice time. It also results in meets closing their registrations early because they fill quickly. An additional competitive pool would spread usage.
- Minnesota has 8,000 swimmers in registered programs.
- It is common for swimmers from South Dakota, Iowa and Wisconsin to compete in Minnesota.
- If a new pool were built, the two high school pools might be able to close.
- Bethany College has an interest in establishing men's and women's programs, if a competition pool is built.
- An 8 lane pool may attract MSU varsity competition and spur invitational meets.

Basketball/Volleyball

The NASC has grouped these together because they use courts, and there is a lack of court time in the area. MSU has exceptional facilities, but they are used first for on-campus activities. Regular use of MSU courts by outside organizations for practice and league play is difficult. Tournaments can be easier to schedule because they do not happen on a weekly basis.

Nonetheless, significant advance planning and cooperation will be required to schedule outside events.

Bethany College also has very nice courts but the same restrictions apply.

There is no off campus multi-court facility in the region. The YMCA's two courts do have an adult men's program.

- Youth basketball (non-school related) has 22-25 teams of boys and girls between grades 4 and 8.
- These participants can practice only twice each week due to the lack of access to gymnasiums.
- They are currently renting about 50 hours a year outside the area.
- It would be possible to add a program for third graders with more courts.
- The continued growth in kindergarten classes means more kids will be turned away or their start in the sport delayed.
- To delay entry can equal lost interest.
- MSU does host an annual volleyball tournament that provides excellent fund raising for local volleyball programs.
- Volleyball, like basketball, is growing.
- The volleyball program uses whatever time they can get wherever it can be found.
- Current programming is for youngsters.
- There is excellent potential for fourteen year olds and under and also adult league play.
- The lack of access to courts makes expansion impossible.

Baseball and Softball

These seasonal sports often suffer from the lack of indoor training or competition space. We noticed MSU lost 6 baseball and 6 softball games this spring along with 28 lost practices and 29 rescheduled games. It is reasonable to assume similar difficulties at the high school and club levels.

These issues are among those that prompted the MSU Dome Study.

- Outdoor turf fields (rectangular) would help provide practice time in the spring.

- If a dome or indoor facility were built, batting cages would be a must.
- The Mankato Area Girls Softball Association pledged almost \$60,000 in field time to MSU's dome study.
- The Minnesota Thunder Academy (baseball), currently not doing business in Greater Mankato, pledged to establish a series of camps and a college showcase camp to the MSU dome study.

Tennis

There is a shortage of courts and no indoor multi-court facility. As a life sport, tennis is not played by as many people and as often as would be the case anywhere court access is available.

- There are no indoor tennis courts in the Metro area.
- One court was available but it was outside town, needed much more participation and finally closed.
- The state senior games tennis competition will be held at MSU's outdoor courts.
- Bethany College has men's and woman's teams and MSU has a woman's team...and all could use a home plus indoor courts.
- The best combination would be 8 indoor courts with 15 outdoor courts.

Indoor Track

MSU has hosted two NCAA Division II Indoor Track and Field National Championships. This is a testament to the quality of MSU's facility, even though it does not have its own scoring system. Indoor track should be regarded with potential, and additional meets might be held in the future, particularly if some pressure was reduced on the courts inside the track. A dome would provide such release.

These comments are typical of those received. We also met with representatives of a bike polo group. This new sport is played on a tennis court or a purpose built surface 135' by 65'. The best facilities are located indoors, and the lack of even one indoor tennis court causes problems. The court does need boards, which can be made for about \$5000. Bike Polo may become

a popular activity and could be conducted in the proposed four court tennis building.

Proposed Dome at Minnesota State University, Mankato.

A dome sports center feasibility study was completed for MSU in April, 2013.

MSU has been interested in a dome for several years. It would provide indoor practice space for football, baseball, softball, and soccer. It would also provide additional space for intramural competitions and practice, reducing pressure on other on campus indoor facilities.

Because this project will not move forward at this time, the question emerges as to the viability of an off-campus dome which could be shared by several sports. If the university discovered the need for as much as \$500,000 in usage fees to make the project economically viable, and if that money is not available, it follows that these needed dollars will not be available for rentals in an off-campus facility.

A very close look at dome costs and revenues is needed.



As we consider the potential for new sports facilities it is important to look at the growing market for youth sports tournaments. Although most new facilities are developed first and foremost to satisfy unmet local needs, making them tournament friendly offers excellent potential for more visiting teams and their family and friends.

In the late 1980's, fewer than 40 cities were competing to attract sports events. In 2013 there are more than 430 markets represented by host organizations. Events are pursued primarily by sports commissions, convention and visitors bureaus, chambers of commerce, hotels and hotel chains, and colleges and universities.

Visit Mankato serves Greater Mankato, one of these markets.

Fortunately, more and more events become available for bid every year. And, more and more communities are either creating events or helping existing events grow by attracting more and more visiting teams.

The types of events fall into two categories:

- Ticketed events (i.e. NCAA Division II playoff events).
- Participant events (i.e. events at Caswell Park).

The primary focus of this study is participant events. These events bring athletes, officials, family, and friends for the duration of the competition. To repeat, these trips often become “mini-vacations” that permit visits to area attractions before or after the competition.

Participant events usually do not require substantial seating, especially in the early rounds. Even championships can be conducted with limited seating. Participant based events can be broadly defined by whether they are bid or locally developed and bring visitors to the area.

Three recent surveys of bid cities suggest the annual amount of direct visitor spending produced by amateur sports has risen to about \$8.3 billion.

The following observations are important to an understanding of your ability to capture room bookings for sporting events.

- A knowledgeable sales staff and venue management that is connected in the amateur sports industry.
- The ability to assemble a group of local volunteers to help evaluate an event before bidding.
- A room contribution system when required and a way to capture the revenues.
- A method to protect room blocks, maybe even a “stay to play” policy.
- The difficulty in knowing exactly who will be coming before the normal cutoff (qualifying events may not be over in time to meet the deadline).
- Hotels that “go it alone” often have difficulty assisting with event operations.
- Local organizing committees are needed for many events.
- Do not be surprised if teams will travel further to save on hotels, even with increased fuel costs.
- Limited service (or select service) properties may have difficulty committing rooms a year or more in advance.
- No one, including the competition, resolves all of these issues all of the time.

Successful pursuit of this market does require an understanding of all of the local needs for each event. A good way to gather this information begins with the early and continual involvement of your local sports community.

Also, the number and condition of the sports venues determines the type of events that might be bid upon or created locally to attract visitors.

Important: Owners of sports facilities are not primarily concerned with generating room nights and visitor spending. They did not design and build for the market (except for ordinary use for school and/or league competition) and do not concern themselves with issues of condition or availability that could be troubling to Greater Mankato.

There has been a good deal written and said about the sports event travel industry. Please refer to [*Appendix VII - Small-Scale Event Sports Tourism*](#) for a considerable amount of useful detail on the value to a community of utilizing existing facilities to host events that attract visiting teams. This report is a formal university case study on our industry.



VISITOR SPENDING/ECONOMIC IMPACT

The primary element (most will say the only element) in economic impact is visitor spending. When people travel to a destination, the money left behind is new to the market. These dollars produce economic impact as they enter the local economy.

When residents of the area spend during the event, this spending is treated as part of the economic activity in the area. It is assumed these dollars would have been spent in another way in the market. They are not new dollars. They are redirected dollars.

Interestingly, when local teams travel to distant locales, the money spent on the trip is lost to the home economy. It should be obvious that teams will want to travel a portion of each year. If, however, there are enough local facilities to host more tournaments, some of the trips will become unnecessary.

Everyone agrees that having a substantial number of overnight visitors is a good thing. Sports events have become an increasingly effective and dependable way to produce visitor spending and resulting economic impact.

The NASC conducted a 2011 study with the University of Arizona of 35 events in 31 communities. The average direct spend per person was estimated at \$208/person over the 35 events. The daily spending estimates ranged from below \$100 to more than \$300. We will use \$150 in our estimates as a way to demonstrate potential impacts. This also takes into account events staged outside the city center, where select service hotel rooms are priced below \$100/night.

An example may assist in understanding how these computations can be made:

We will assume a girls softball tournament that attracts 50 teams.

Each team has 15 players and another 25 people (family and friends) come along.

Every person is from out of town, and all stay two nights. So, 50 teams x 40 people per team equals 2,000 visitors.

2000 visitors stay 2 nights, for 4000 visitor nights. Each person spends \$150/day.

4000 visitor nights times \$150 equals \$600,000 in visitor spending.

Obviously these numbers change with the number of teams, the number staying overnight, and the number of visitors. And, we have selected \$150/night somewhat arbitrarily, as this number is based in part on each individual's share of the nightly room rate.

It should also be obvious that only five events a year would produce \$3 million in visitor spending. Plus, economic impact estimates are higher. Using a multiplier of 1.7, these same events might produce an estimated \$5.1 million in economic impact.

In recognition of the growing importance of sports event travel, some cities are investing in new sports facility development with twin goals. It should be very obvious by now that cities want the additional visitor spending. The other part of the facility development process is the beneficial impact on residents. More fields and courts allow greater participation. When participation rates increase, everyone benefits from increased fitness and the potential for visitor spending.

The softball tournaments held this year at Caswell Park are excellent examples of events that contribute to the local economy.

Since the amount of visitor spending and its beneficial impact on the local economy are so important to host organizations (sports commissions, convention and visitors bureaus, etc.) there is understandable anxiety any time the right facilities are unavailable, either due to scheduling, costs, or condition.

Every host organization must deal with these problems, and often the solution is not to bid. It may be possible to defer to a later date or year, but fixing what might be needed is a more complex issue because it can involve school boards, city or county government, colleges and universities, or private owners.

Please refer to [Appendix VIII – Tourist Towns](#) for helpful information on how park and recreation departments are partnering with convention and visitors bureaus to produce economic impact.



COMPETITIVE ISSUES

There are a significant number of sports facilities within 30, 60, and 90 minutes. Many are used by residents unable to find what they need at home. It is important to take into consideration the potential impact these competitive facilities might have on the ability of new facilities to attract a sufficient amount of local use to support operations well enough to have them available for tournaments that produce visitors and beneficial economic impact.

Our experience suggests that sports facilities are developed primarily to meet unmet local needs. They are not opened primarily for tournaments. For those that are developed primarily or in part by public funds, quality of life becomes a very important factor... because they are unlikely to generate enough use to make them self-sufficient with the possible exception of ice hockey and figure skating, and this despite the fact there are already more than 500 indoor rinks and as many as 2500 total rinks in the state.

Ice Hockey and Figure Skating

The Twin Cities have a large number of ice sheets, all of which can be considered competitors in the sense that they can host tournaments. The biggest indoor ice complex in the world is located in Blaine, well outside what can be considered competitive territory, but the events they host do take teams away from events held in other cities. It is not reasonable to assume these same rinks will be used for practice sessions for residents of Blue Earth and Nicollet Counties. The travel times prohibit this. Rinks closer to Mankato and North Mankato are more direct competitors. These include rinks in Rochester, Faribault, Fairmont, Northfield, New Ulm, St. Peter and perhaps Hutchinson, Marshall and Albert Lea.

It is interesting to note All-Seasons Arena is booked to capacity with local users and some tournaments, with the balance heavily in favor of local users. This is very important: the existence of the other sheets within 60 minutes has not been negatively impacting ice time.

Our conclusion is there are a large number of ice sheets within 90 minutes, but they have not been taking business from All-Seasons Arena. A good

example is Lund Arena at Gustavus Adolphus College. It is close to Greater Mankato and has 1500 permanent seats. It is not taking business away due to its need to service the needs of the college. And, the demand for tournaments attracting teams from youngsters to high school is so strong as to suggest the addition of another sheet in Mankato will increase your business without losing rentals to other communities.

Domes/Bubble Structure. The state has a large number of domes. Some are permanent and others are seasonal, but the climate has caused enough construction over the past few years for some to claim the Twin Cities has a dome (or bubble as they are sometimes called) every five miles!

Most of these domes/bubbles exist to extend competition and practice seasons and not to cover expenses. In a climate where extremes are expected residents need the opportunities afforded by these types of structures.

Construction and operating costs are the factors to consider. The fact there are domes within 90 minutes, including in Rochester indicates a generally accepted need.

The NASC believes there is a need for a domed facility in your area. We also believe a decision to build will come with the assumption that operating costs will exceed revenues. This will likely be the case even if MSU would ultimately begin renting it for some purposes. An off-campus dome will not get the amount of use from teams and students than would be the case on-campus.

Basketball and Volleyball

There are a number of basketball and volleyball courts within 90 minutes, but only one is a significant factor. The National Volleyball Center in Rochester will always have a significant advantage in terms of total numbers of courts and suitability for tournaments that draw visitors. This is an eleven court building and there are three more in Century High School nearby. If multi-courts are constructed, they will be utilized primarily by local teams and residents. It would be

difficult to justify more than four or so courts for this purpose because of the existence of the National Volleyball Center.

We realize how important to local programming additional courts can be. It also must be accepted that these buildings do require substantial use.

Soccer

Our interviews uncovered a good deal of interest in an indoor turf field, primarily for off season practices. There is a move nationally to the development of indoor facilities that have large expanses of turf...and many are large enough to be considered full size fields for 11v11 games.

Fields like this are also very useful for indoor baseball and softball practices, particularly if they are equipped with pitching and batting cages. A just opened facility in Lancaster, PA has a full size baseball infield that can be adjusted for softball and youth baseball.

The Mankato United Soccer Club pledged to support the MSU on-campus dome.

We did not locate other domes within enough proximity to permit use for weekly practice sessions. This indicates a dome would be in heavy demand for practices and games.

Swimming

Our discussion of swimming has indicated the need for a competition pool that could become a shared use project, probably housed in a new YMCA.

At the present time local swimmers have to travel to Rochester or to St. Thomas University for good quality pools. There are additional pools in the Twin Cities, with the University of Minnesota having the most notable competition pool in the state considering the needs of all four aquatic sports and spectator capacity. The Lake Crystal Area Recreation Center pool is used for training by some residents. The indoor pool is 25 yards long and has six lanes...sufficient for training but not for meets of any size.

Gustavus Adolphus College does have a competition pool. It is 25 yards by 25 meters and includes 10 lanes and some permanent seating. This pool is close to what is recommended.

We do not believe any of these pools are substitutes for what is needed for local users. The G-A pool could be regarded as competitive, and is close enough to be used for a limited number of meets and some practice but it is intended for campus use.

Please note Appendix IX – Schooled in the Way of the Y for information on cooperative aquatics projects between YMCAs and universities and colleges.

Tennis

The lack of indoor courts requires local players to leave town in the winter. This is a quality of life issue. An indoor multi-court tennis club did exist at one time, but is no longer in business.

Our discussions indicated the need for four courts. This is sufficient for local and regional players and small events. Visitor spending would not be a significant factor, in our opinion.

Softball and Track and Field

Other than the opportunity to add two more fields at Caswell Park softball needs an indoor practice site, but not more fields.

Indoor track and field can be accommodated at MSU, where a very nice track is available with sufficient planning.

Outdoor track and field would also be best served at MSU, despite the lack of a timing system, seating, and lights.

These two sports are not impacted by competition.

Summary

The sports with the most competition are the ones most in need of additional facilities. Ice hockey and figure skating are so popular and the demand for more ice time so great that the need for one additional rink now and the ability to add another later has been established.

Much has been said about a dome. Local sports organizers are anxious to have access to an indoor turf field. With the realization that MSU feels the need for as much as \$500,000 in university based fees plus outside uses would be necessary to support the project, it may be unreasonable to assume such a building could succeed with little or no usage by MSU. Swimming pools usually do not generate enough revenue to cover expenses, and the larger the pool the greater the expense. What could work is a new YMCA pool supported by user agreements with MSU, Bethany, and the local schools. We have just visited the Graham Aquatics Center in York, PA. It has the features mentioned most often in our interviews (except for a diving well) and was completed for less than \$10 million.

Please refer to Appendix X – Graham Aquatic Center, York YMCA



OBSERVATIONS

Substantial need has been found for indoor practice and competition space for ice hockey, figure skating, soccer, baseball, softball, court sports and aquatics.

A logical site for a dome, but certainly not the only choice, would be on the campus of MSU. This plan has been suspended due to the lack of funding for university based uses. Locating a dome on campus (or as close as possible to campus) could make it available for all potential uses. Otherwise, the amount of athletic department and student use would be curtailed.

The MSU study looked at multiple campus locations for an inflatable dome containing one field, one field and half of an additional field, or two fields in one structure. It also examined costs for a permanent structure or one that would be seasonal and stored during the summer.

Ice hockey and aquatics are different matters entirely. There is a clear and pressing need for a minimum of one additional sheet of ice, with a second partially scheduled if built now, and completely full if delayed only two to three years. If the MSU woman's team moves downtown as hoped the time picked up will primarily be during school and work hours when those in need of ice time cannot skate.

MAHA has presented evidence that one sheet can support itself financially. These projections were prepared in cooperation with management of All Seasons. We believe they understand what will be required and how it will perform. MAHA has also offered to contribute about a third of the costs, assuming a successful drive to raise most of the amount pledged.

In the case of aquatics there is no pool that meets minimum standards for competition that would attract outside users. The current indoor pools at MSU, the high schools, and the YMCA do not meet competitive standards or minimum needs from spectators. Bethany College would like to add swimming and MSU might move their program to a larger, better equipped pool.

Because the YMCA is interested in expanding its programming to the eastern side of Mankato and also in having a competition quality pool, they would be a primary partner.

There are two basic dimensions for pools. The long course dimension is 50 meters in length and a short course is 25 yards. Because high school, college, and YMCA competition takes place at 25 yards that would be the preferred dimension.

We did not determine whether a new pool could result in removal of the current high school pools. This is an option to consider. The combined needs for pool time between the YMCA, Bethany, MSU, the high schools and the local swim club may be too great to satisfy, requiring the high school pools to continue to be used for practices and other campus or community programming not based upon meeting minimum standards for competition.

The sport of soccer can always use additional outdoor fields. Because this is so, if a site large enough can be found it is warranted to consider adding more rectangular fields...perhaps another four to six.

Caswell Park is an excellent softball complex. Two additional fields have been considered, and we suggest they will prove valuable to the local softball community and to expanded tournaments that attract visitors and spending.

One of the biggest new trends in the sports travel industry is the construction of multi-court indoor sports complexes. If Greater Mankato had such a complex, issues with scheduling MSU, Bethany or high school courts would be substantially reduced. Basketball and volleyball programs, which will not benefit directly if MSU builds the dome, need space. They might find more hours available on campus as a result of the dome, but an off-campus multi-court building offers them the best of all worlds.

This report does point out the presence of a multi-court facility 80 miles away that would compete for tournaments.

The meetings that have taken place over the past year or so have indicated interest in one complex that serves the needs of all. Certainly this is a choice.

It is also very possible to build in separate parts of the community, particularly if a multi-court building is contemplated. That could be placed almost anywhere, although it is always important to keep in mind the convenience for visitors...they need hotels and restaurants that are close to the competition site(s).

Discussions have taken place on the energy saving benefits of co-locating an ice sheet with a pool. There are reasons to do this, but it is very important to pre-plan for the second sheet of ice so the space and parking have been established and the ice plant is capable of running the second sheet.

Other worthy non-sports projects are under consideration. Not all will be funded. We wish to observe that the sports industry offers many opportunities to increase economic development through visitor spending in an industry that has proven itself resistant to economic downturns. Increased spending leads to more jobs and increased tax receipts.

There is another factor to consider. This is the trend nationally to the creation of events that take place year after year instead of relying on bidding. ASA Softball events like those at Caswell Park in 2013 will always be a target. At the same time it can make sense to create your own.



CREATING YOUR OWN EVENTS

Although it will always be desirable to bid on events, it is very important for Visit Mankato to work toward more locally developed tournaments for visiting teams. When new cities enter the industry, they learn that the quickest route to increased room nights is to assist in the growth of existing events that are already attracting teams to the area.

Your clubs and leagues know where these teams can come from. What they may lack in volunteers or tournament organizational abilities is more than made up for by their love for the sport and need for additional funding.

Combining a love for sport with a way to raise additional funds to support programming with the need to build economic impact through visitor spending can make for promising results. Your clubs and leagues have the former and the Visit Mankato has the latter.

Our recommendation is for Visit Mankato to invest time each year developing relationships with clubs like MAHA, MUSC, MAGSA and others. Talk with them about their own needs and desires. Discuss the ways in which you may be able to assist in the development of events. Look for ways they can earn substantial revenue while Visit Mankato produces visitor spending that benefits the entire community.

Sports commissions across the country are spending more time on event development than on bidding. Times have changed. Many event owners have responded to the growth of our industry by increasing bid fees, instituting room contribution systems and otherwise raising the costs of doing business.

In response there are commissions unwilling to pay bid fees, and they continue to succeed. They may agree to a guarantee (the NCAA does require a guarantee to host one of their championships, but it is arrived at after considering the history of the event and its appeal to the ticket buying public). Some NCAA events will soon be available without guarantees or bid fees. The NASC is involved in the dialogue that will lead to this certainty: there are events that need

quality hosts that cannot command a guarantee. Instead, the NCAA is looking for the guarantee of a quality experience for the athletes. This is where the industry began many years ago.

Any discussion on creating events should include attention to visiting teams, family and friends. The quality of the competition venues is always crucial, but so is the quality and availability of the right kinds of hotels and restaurants, retail, and other things to see and do during the visit.

Visit Mankato has a Visitor's Guide that summarizes these issues. There are other things to see and do, including many cycling opportunities, winery and breweries, arts and culture and shopping. All visitors need to receive this information well before they arrive. Adding a night or two before or after the event can mean a great deal in terms of economic impact.





CONCLUSIONS

In many respects this study has resulted from a series of forums that permitted various organizations in Greater Mankato to express their concerns and wishes regarding programming issues faced by the amateur sports organizations. It was decided it would make sense to get an idea of the needs of each group and see if common interests and concerns could be combined. As in any community some organizations are better funded and have higher profiles than others. And, at the same time, there are organizations with the potential to grow and flourish if appropriate facilities were available.

The interviews and site visits included in the study reflect the individual and collective needs of the participants in the forums.

One of the products of the forums is a concept drawing for what has been referred to as the Greater Mankato Regional Athletic Complex. The concept includes four indoor tennis courts, an indoor track with three basketball/volleyball courts inside the oval, two sheets of ice, an indoor bubble with two turf fields, an eight lane swimming pool and administrative, meeting, and support space. It has been presumed to include outdoor athletic fields as well.

This concept fairly represents the needs expressed to the NASC. Each element has its supporters, and each would do a much better job of serving the needs of the sports served. So, if selection of the elements to be built rests solely on need, all should be included.

Here are common reasons for construction of new sports facilities:

- There are no suitable facilities for the sport, causing the public to be underserved (i.e. indoor tennis)
- Facilities exist, but they are not suitable for competition...even if modified (i.e. MSU pool)
- Facilities exist, but they are on a campus and outside users must be satisfied with undesirable times for practice/games (MSU field house)
- Suitable facilities exist, but the sport is so popular more space is needed (i.e. All-Seasons Arena)

- Suitable facilities exist, serve well the needs of local athletes and also attract visitors that create beneficial economic impact for everyone; if there were more, still more could be accomplished (i.e. Caswell Park softball)
- If competition quality facilities were provided, existing local programs could expand, including adding the sport to an academic institution's athletic teams and better serving other area schools and clubs...plus the value of events that attract visitors (i.e. a competition quality swimming and diving center and a multi-court indoor basketball/volleyball complex)

It can be inferred that what is imperative is to decide which criteria are most important and then decide what should not be built because enough courts or fields already exist or there is just no room for more than one in a medium to small market.

Tennis is an example. There are no indoor tennis courts in the area. With plenty of players and more that would take up the game if facilities were available, there is no question in our mind of the need for indoor courts. Four indoor courts like those in the concept drawing are relatively inexpensive to construct and operate. In fact, we believe they would be the most economical of the elements.

Four courts, however, are not really sufficient for events that would attract significant numbers of visitors. They are enough for local clubs and leagues, and could host very small events. They could also assist the college and university programs by providing indoor space in a climate where the game is likely to be played more indoors than out.

Track and field is a different case. MSU already has a field house with a track that has hosted NCAA National Championships. Here, the compelling need for a second indoor track must rest on the inability to find sufficient hours in the week for outside uses of the track. The MSU field house is used to capacity... that is one reason for the university interest in a dome...to take some pressure off existing on campus indoor facilities.

The NASC does think the existing track is more than sufficient for competitive events that can attract visitors.

An indoor track raises substantially the cost of the building. An indoor track must be 200 meters. To make room for the track, some seating and the field events, the building will need to be much larger than what is required for basketball and volleyball courts.

Interested persons can refer to the Boo Williams Sportsplex in Hampton, Virginia. This complex includes two large buildings, one of which has an indoor 200 meter track and four basketball courts in the infield. The track would require more than 50,000 additional square feet of floor space and also the air space above it. With HVAC costs on the higher end in a climate that has a significant amount of inclement weather, commitment to a track would require a strong belief in the benefits of providing this much space.

The concept also includes two indoor turf fields. According to the MSU study, two indoor fields with an inflated dome would cost at least \$4.5 million plus the turf and finishing and fixtures. Whether this dome is built for one field, one field and one short field, or two fields its existence would, in our opinion, remove the need for another dome.

One dome is needed. The questions are whether it will be on or off campus (MSU) and if it is affordable.

With one or more indoor turf fields the sports of soccer, baseball, softball, lacrosse and football would be very well served. An on-campus dome would need to commit large amounts of time to football each fall. This might not be the case if a dome were built off-campus.

We have found substantial need for, and interest in, a new 8 lane swimming and diving facility. The best partner for such a venture would be the YMCA. They have identified the need for a new pool, are looking to expand to the east side, and have significant expertise

with all forms of aquatic sports and recreation.

Bethany College has indicated interest in adding varsity programs in swimming and diving if a suitable facility is available.

MSU is limited with what they can do with their 6 lane pool. We would expect them to be interested in moving varsity competition to a new facility.

East and West High School have pools, but they are not at all able to provide what the new pool would offer for competition.

So, we see potential for a facility supported by the YMCA and local and regional swim clubs plus the college, university, and high schools. MSU and the high schools could continue to practice on campus. We have included information on other YMCA projects to assist in your understanding of what others have been doing.

A new ice hockey and figure skating rink is needed. These needs are demonstrated in this report. All projections indicate the additional ice time would be consumed in the first year. This strongly indicates the need to plan the new sheet so the ice plant can handle an additional sheet when needed, and space must be set aside for the second sheet when the property is identified.

The new sheet should have a concrete floor so the ice can be removed for the summer. The same floor area makes for an excellent indoor soccer field or roller hockey floor.

Finally, it would be ideal if a six court indoor sports complex were built. This could stand alone or be connected to the new rink or swimming pool. A six court building could become a regional mecca for basketball and volleyball competitions. It could be planned so that two volleyball courts would be placed across each basketball court. With six basketball and twelve volleyball courts this would become an outstanding location for local and regional uses in

the fall and winter and an equally excellent site for regional and national competitions in the spring and summer.

The AAU and USSSA have events that could flourish in such a building...bringing with them millions of dollars in visitor spending.

A six court complex can include a number of meeting rooms for community purposes, a walking track, and even a kitchen to assist the preparations for meetings that include meals or refreshments. Some of the meeting rooms can be used when tournaments are in the building.

The complex should also have a roll-up door and outside access to the floor via a loading dock. The courts can be covered and chairs and tables brought in for meetings and banquets.

Courts provide an ideal surface for the installation of wrestling mats, mats for all of the martial arts, and gymnastics competitions.

Some permanent seating in the form of roll-out bleachers would be sufficient.

Our interviews and site visits have led us to conclude sufficient demand exists that the financial feasibility of the following should be determined:

- **New ice sheet (the enclosed information suggests this project may be able to move ahead based on current projections, which are included herein).**
- **New swimming pool serving the needs of the YMCA, college, university, high schools and swim club.**
- **Bubble dome, either permanent or seasonal, with one full size soccer field and related practice equipment including batting and pitching cages.**
- **An indoor multi-court field house with a community center that has meeting rooms, a**

kitchen and perhaps classrooms. Use can be projected based upon four or six courts.

- **Four indoor tennis courts with a viewing area, concessions and restrooms and sufficient gathering space (all indoor facilities need plenty of circulation space and conveniences).**
- **A brief look at the additional space and HVAC requirements for an indoor track around four of the indoor basketball/volleyball courts.**

There is no question each of these are needed for local uses. Questions of affordability can be resolved by a Financial Analysis.

APPENDIX I

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NATIONAL ASSOCIATION OF
SPORTS
COMMISSIONS

NASC Staff Bios

Don Schumacher, CSEE
Executive Director

Lori Gamble
Associate Executive Director

Beth Hecquet, CMP
Director of Meetings and Events

Elizabeth Chaney
Director of Membership and Marketing

Meagan McCalla
Member Services Coordinator



Don Schumacher, CSEE
Executive Director

Don Schumacher, CSEE, has more than fifty years of experience in the field of communications, family entertainment, theme park marketing and operations, arena and stadium marketing and operations, event management, sports marketing and facilities consultation. For the past thirty years he has focused his activities on the sports event travel market, and has consulted with more than fifty cities on strategies to increase their share of this market.

Schumacher is the full-time executive director of the National Association of Sports Commissions (NASC), an organization he helped found in 1992 and which now has more than 600 members nationwide. He has earned the distinction of Certified Sports Event Executive (CSEE) from the NASC. In addition, he team teaches an elective course on sports destination marketing and management in the Destination Management Association International (DMAI) Certified Destination Management Executive (CDME) Program.

Mr. Schumacher's experience includes the following:

- College Football Hall of Fame and Galbreath Field, General Manager
- Cincinnati Riverfront Coliseum (now U.S. Bank Arena), President – Developed the 1987 World Figure Skating Championships and the 1987 NCAA Midwest Region Championships, along with dozens and dozens of family shows, concerts, and many other sporting events.
- Riber Sports Marketing, Vice President – Created the Greater Cincinnati Sports and Events Commission, worked with the PGA Championship, Kroger Senior Classic, World Cup of Golf,
- Cincinnati Cyclones Hockey Club and developed promotions for various Procter & Gamble brands.
- Don Schumacher & Associates, Inc., President. Founded and managed the firm from its inception.

For nine years, he served as the executive director of the Greater Cincinnati Sports and Events Commission. During those years, Mr. Schumacher brought a number of high profile events to Cincinnati including the 1991 U.S. Gymnastics National Championships, 1992 NCAA Southwest Region first and second round games, 1992 diet Coke Skaters' Championships, 1994 AT&T Skates of Gold, 1996 NCAA Hockey Championships, 1997 Women's Final Four, and the 1998 Conference USA Basketball Tournament.

Don Schumacher is a nationally recognized speaker and consultant on the sports travel industry. He has made many presentations for groups as varied as the International Association of Convention & Visitors Bureaus, National Recreation and Parks Association, United States Olympic Committee, the Association of Luxury Suite Directors, the Travel, Events, Management in Sports (TEAMS) conference, the World Congress of Sports, and SportAccord, an international conference on sports business.

Schumacher has been invited to speak on the industry in international destinations including Madrid, Lausanne, Beijing,

Athens, Dubai, Cape Town, Tokyo, and Osaka. He has also been a featured speaker at more than a dozen state governors' conferences on tourism, most recently for the Minnesota Governor's Conference on Tourism in February, 2013.

In addition, Schumacher is continually consulted on industry questions relating to bidding procedures, economic impact of events, and issues of concern to the future of the industry. He has served the arena and stadium industry as a facilities manager, event promoter, and event bidder, owner, and developer. He understands why event owners decide which cities and facilities are suitable for their needs, and how cities can find these events. Schumacher is quoted regularly in industry publications and daily newspapers, including the Wall Street Journal, New York Times, SportsTravel magazine, Sports Events magazine, Sports Business Journal, and Athletic Business magazine. In July, 2008 Schumacher was named one of the "25 Influential People You Should Know" by Sports Events magazine.



Lori Gamble
Associate Executive Director

Lori Gamble is the Assistant Executive Director of the NASC, and is responsible for developing, managing and executing the annual operating budget. As General Manager of Don Schumacher & Associates, Inc. since 1992, Gamble has been instrumental in the growth of the association over the past 15 years. Her experience at DSA since graduating with a Bachelor of Science in Communications and Media Relations from Miami University includes advertising, media and public relations, event creation and management, sponsor sales and service, facility consulting project coordination, and much more. With the transition to being a fully functioning, independent corporation, Gamble now serves as an independent contractor to the NASC.



Beth Hecquet, CMP, CMM
Director of Meetings and Events

Beth Hecquet, CMP, CMM, has been with the (NASC) since January 2002. As the Director of Meetings and Events, Beth is responsible managing the NASC Sports Event Symposium, Certified Sports Event Executive (CSEE) program, Market Segment Meetings, Regional Workshops and any other face-to-face meetings and events hosted by the NASC. Beth is the staff liaison for the meetings and professional development committees. Prior to her current position, Beth served as the Director of Member Services, managing the day-to-day operations of the NASC.

Prior to her time with the NASC, Beth was a Sport Manager with the Amateur Athletic Union (AAU) responsible for the management of seven sports as well as event management at the annual AAU Junior Olympic Games. Beth also spent some time with the Indiana Sports Corporation (ISC) in 2000 and was

involved with planning and operations for the 2000 Big Ten Women's Basketball Championship, 2000 NCAA Men's Final Four and the 2000 US Olympic Trials – Swimming. Beth earned a BA in Kinesiology with a minor in Business from the University of Kentucky (UK) in May 1998 and a Master's in Sport Management, also from UK, in December 1999.



Elizabeth Chaney
Director of Membership and Marketing

Elizabeth Chaney joined the NASC staff in October 2007 as the Director of Member Services and currently serves as the Director of Membership and Marketing. Elizabeth is responsible for membership recruitment and retention, manages the fulfillment of all member services and benefits, plans and implements association marketing campaigns and branding initiatives, including association publications (digital and print) and communications, oversees association's advertising opportunities and NASC's relationship with MultiView (third party sales team), manages NASC website and CRM development, administers the annual NASC Member Awards program and oversees all aspects of the NASC Sports Legacy Fund. Elizabeth is the staff liaison for awards, membership, mentoring, and Sports Legacy committees.

Before joining the NASC, Elizabeth was an Account Executive for Pacers Sports and Entertainment (PSE). At PSE, she was responsible for generating season ticket sales and group sales for the Indiana Pacers (NBA) and the Indiana Fever (WNBA). Preceding her time at PSE, Elizabeth spent three and a half years as a Marketing Associate in the Department of Athletics at The Ohio State University where she oversaw marketing plans for several varsity sports including: men's hockey, softball, women's soccer, and wrestling. During her tenure, the women's soccer program led the Big Ten Conference in average attendance for home matches for two consecutive seasons (2005 and 2006). Chaney was also a two-time member of the Big Ten Marketing Staff of the Year (2005-2006 and 2006-2007). Additionally, Elizabeth developed event marketing plans for the 2006 Duck 'N Dodge dodgeball tournament and the 2007 International Diving Invitational on behalf of the Greater Columbus Sports Commission.

Elizabeth served as a part-time faculty member at Northern Kentucky University in the Department of Economics, Marketing, and Sport Business in the Haile/ US Bank College of Business from 2009 – 2012, where she taught sports promotion tools and sports tourism marketing. In September 2010, the Greater Cincinnati Chapter of the Cystic Fibrosis Foundation recognized her as one of Greater Cincinnati's Finest Young Professionals.

Elizabeth earned a Bachelor of Science in Business Administration with a minor in Spanish in June 2005 and a Master of Arts in Sport & Exercise Management in June 2007, both from The Ohio State University.



Meagan McCalla
Member Services Coordinator

Meagan McCalla joined the NASC staff in June 2013 as the Member Services Coordinator. In that role, Meagan supports Beth Hecquet and Elizabeth Chaney with day-to-day operations at the national office including assisting with membership recruitment and renewals, maintaining the membership and marketing databases, coordinating mailings, and assisting with meeting and event planning. Meagan also executes monthly Best Practices Webinars.

Prior joining the NASC staff, Meagan interned with the NASC in 2012. Meagan earned a Bachelor of Arts in Strategic Communication with a focus on Marketing from Miami University in May 2013. While at Miami, Meagan was a member of the Public Relations Student Society of America (PRSSA) and served on the Public Relations Committee for two years. Meagan also was a member of Miami University Honors Fraternity, Lambda Pi Eta and served on the Internal/External Relations Committee for two years. Before transferring to Miami University, Meagan attended Capital University where she was a member of the varsity basketball team for two years and studied Marketing.

Statement of Experience

DON SCHUMACHER, CSEE
National Association of Sports Commissions

Sample facility management/event bidding/operations/ marketing/consulting experiences.

College Football Hall of Fame and Galbreath Field. Served as general manager of the hall of fame and its 10,000-seat stadium. Bid upon and presented three years of high school football and soccer playoff games. Developed relationship with NCAA and obtained 1983 and 1984 Division III National Football Championships.

Cincinnati Riverfront Coliseum (now U.S. Bank Arena). President of this privately owned 17,000-seat arena. In addition to a full schedule of college basketball, concerts and family shows, we bid upon, developed and presented the 1987 World Figure Skating Championships and the 1987 Midwest Regional Championships (NCAA Division I).

Greater Cincinnati Sports & Events Commission. Nine years as executive director (1989-1998). Bid on and developed more than forty events that produced \$45 million in direct visitor spending. Events included a wide range of AAU National Championships, professional figure skating, the 1992 NCAA Southeast Region 1st and 2nd rounds, 1996 NCAA Hockey Championship, and 1997 Women's Final Four.

Cinergy Field. Part of the management team and responsible for marketing facility for non-Reds, non-Bengals rentals.

Paul Brown Stadium. Developed and implemented a successful personal seat license campaign which raised \$26 million... \$5 million more than the minimum required, in support of the team with poorest on-field record at the time in the NFL.

Sample consulting projects — facilities

Performed feasibility study and prepared a bid for the United States Olympic Festival, a \$12.5 million event.

Conducted initial study of all sports facilities in Cincinnati, Dayton, Columbus, Indianapolis, Louisville, and Lexington for possible use in an Olympic Games bid.

Conducted market support study for Downtown Tulsa Unlimited for a new downtown arena, refurbished convention center, and a natatorium and a football/soccer/track and field stadium. Developed comparable case histories for each proposed facility.

Market support study for Union Public Schools in Tulsa. This \$20 million student activity center opened in 2004 and has exceeded our most optimistic projections.

Market support study for Kingsport, Tennessee. Comprehensive analysis of all sports facilities with possible modifications and cost benefit analysis. Includes an indoor community recreation center.

Conducted a follow-up study for Kingsport on further developments including an indoor aquatic facility and water park.

Market support study for City of Federal Way, WA on potential for a multi-purpose field house.

Conducted sports facility analysis, including potential impact of a new recreation complex, for Lake County, Illinois.

Developed and conducted a comparative arena operations study for Golden State Warriors which included four NBA/NHL arenas.

Conducted a comprehensive study for the Pensacola Sports Association designed to assist in the redevelopment and expansion of sports facilities that will bring incremental visitor spending to Escambia County, Florida.

Served as expert witness in legal proceedings on behalf of Walt Disney Sports, the Golden State Warriors, and U.S. Bank Arena.

Performed a complete feasibility study for the Mississippi Band of Choctaw Indians on a proposed motorsports complex at the Pearl River Resort in Mississippi.

Conducted a feasibility study for a multi-sport complex for the Euclid-St. Clair Development Corporation in Cleveland, OH.

Conducted a comprehensive sports facilities study for Alpharetta, GA including an economic impact analysis and a strategy for developing new sports facilities that will produce room nights.

Developed the successful naming rights proposal for the new Regional Events Center at Northern Kentucky University (Bank of Kentucky Center).

Conducted a complete sports facilities analysis for the Central Pennsylvania Convention & Visitors Bureau including recommendations for new sports facilities, cost estimates, and economic impact estimates. This project included extensive interviews and focus groups with key user groups and partners.

Conducted a thorough analysis of all sports facilities in the Greater Evansville, IN area and suggested modifications and upgrades to produce substantially greater levels of visitor spending.

Conducted an analysis of potential new sports facilities for Mesquite, NV including projections as to the number and kinds of facilities and possible results in terms of events and annual increases in visitor spending.

Conducted an analysis of the amateur sports facilities in Fairfax, County VA for the purposes of increasing economic impact for the county through visitor spending.

Conducted a complete analysis of all sports facilities in Panama City Beach and Bay County, FL and made recommendations on expansions and projections on increased visitor spending.

Conducted a market study for a potential aquatics facility in Chesapeake, VA.

Conducted a sports facility audit and recommendations for additional facilities and suggestions for effectively marketing the area for Shreveport-Bossier City, LA

Conducted a study of all tournament quality sports facilities in the Myrtle Beach-North Myrtle Beach area (The Strand) complete with recommendations for expansion of existing facilities and possible new construction.

Conducted a market analysis for a multi-sport complex and arena for the Cheboygan MI Regional Development Council.

Conducted a study for the United States Tennis Association of the impact in 2011 of a combined men's and women's event on the Western & Southern Classic in Mason, Ohio.

Conducted a market study for a proposed sports complex in Dover, Delaware.

Conducted a complete analysis of the sports facilities in Dayton and Montgomery County, Ohio and made recommendations on ways to increase the number of sports events drawing visitors to the city and county.

Consulting projects with sports commissions or convention and visitors bureaus.

Cincinnati, OH	Gahanna, OH
Williamson County, TN	Dover, DL
Elkhart County, IN	Chicago Southland, IL
Tampa, FL	Alpharetta, GA
Warren County, OH	State College, PA
Detroit, MI	Springfield, IL
Wausau, WI	Pittsburgh, PA
Grand Rapids/Kent County, MI	Lake County, IN
Port Charlotte, FL	Evansville, IN
Louisville/Jefferson County, KY	Mesquite, NV
Shelby, NC	Pensacola, FL
Kingsport, TN	Panama City Beach, FL
La Porte County, IN	Chesapeake, VA
Des Moines, IA	Shreveport-Bossier City, LA
Lake County, IL	Dayton, OH
Memphis/Shelby County, TN	Lake Erie Shores & Islands CVB
Manchester, NH	Buffalo Niagara Sports Commission
Kettering, OH	Johnstown-Cambria County, PA
Lake County, IN	City of Myrtle Beach, SC
Clermont County, OH	Rapid City, SD
Gwinnett County, GA	Chester County, PA
Columbus, IN	Bryan-College Station, TX
Fairfax County, VA	Mankato, MN
York County, PA	Tupelo, MS
Vanderburgh County, IN	Cobb County, GA
Arlington, TX	Franklin County, IN
Myrtle Beach, SC	

Management of sports organizations.

Greater Cincinnati Sports & Events Commission (noted above; operated this not-for-profit corporation under management contract for nine years).

National Association of Sports Commissions. Began managing the NASC in 1994. Became full time executive director in January, 2011. The NASC has grown to about 625 members and has launched a Strategic Consulting Service to assist in the development of effective strategies for economic development.

Sports Events magazine (July, 2008 issue) selected Don Schumacher as one of twenty-five persons you should know.

National Association of Sports Commissions

9916 Carver Road, Suite 100 Cincinnati, OH 45242

Phone 513.281.3888 Fax 513.281.1765 www.SportsCommissions.org www.NASCsymposium.com



Sport	CORE Definition (Participation frequency)	National CORE Participation Rate	30 minutes			60 minutes			90 minutes					
			Population	Participants	Participation Rate	Index	Population	Participants	Participation Rate	Index	Population	Participants	Participation Rate	Index
Baseball	13+ times a year	3.3%	93,534	2,650	2.8%	87	370,447	13,526	3.7%	112	2,316,786	89,562	3.9%	118
Basketball	13+ times a year	5.8%	93,534	4,941	5.3%	91	370,447	22,513	6.1%	104	2,316,786	165,322	7.1%	122
Ice Hockey	13+ times a year	0.4%	93,534	315	0.3%	83	370,447	1,605	0.4%	105	2,316,786	12,909	0.6%	136
Soccer (Outdoor)	26+ times a year	2.2%	93,534	1,889	2.0%	91	370,447	9,564	2.6%	116	2,316,786	65,523	2.8%	127
Swimming on a Team*	1+ times	0.8%	93,534	663	0.7%	86	370,447	3,031	0.8%	98	2,316,786	24,421	1.1%	127
Softball (Fast-Pitch)	26+ times a year	0.4%	93,534	419	0.4%	110	370,447	2,034	0.5%	135	2,316,786	10,203	0.4%	108
Tennis	21+ times a year	1.8%	93,534	1,607	1.7%	94	370,447	7,199	1.9%	106	2,316,786	57,338	2.5%	135
Track and Field	26+ times a year	0.9%	93,534	778	0.8%	95	370,447	3,879	1.0%	119	2,316,786	22,288	1.0%	110
Volleyball (Court)	13+ times a year	1.4%	93,534	1,251	1.3%	98	370,447	5,624	1.5%	111	2,316,786	39,896	1.7%	126
Swimming on a team uses ALL participants														

* Swimming on a team uses ALL participants

Total population Age 6+ in each Zipcode - in the drive time

Projected number of participants (individuals age 6 and older) in each zipcode

The weighted index takes the size of the zipcode into consideration. So the index for a smaller zipcode is reduced and the index for a larger zipcode is increased.

Participation rate - number of participants as a percentage of individuals age 6+

Index comparing zipcode to the USA average. An index of 100 equals the USA average. An index of 150 is 50% higher than the USA.

Zipcode	Population	Baseball Participants	Participation Rate	Index	Weighted Index
56024 Eagle Lake	2,482	136	5.5%	167	80
56037 Good Thunder	1,451	60	4.1%	126	35
56080 Saint Clair	601	24	4.0%	122	14
56048 Janesville	3,381	125	3.7%	113	73
56065 Mapleton	1,451	52	3.6%	111	46
56021 Courtland	1,451	45	3.1%	99	22
56063 Madison Lake	1,451	48	3.3%	101	46
56074 Nicollet	1,451	47	3.2%	98	34
56082 Saint Peter	1,451	40	2.7%	81	199
56003 Mankato	12,532	433	3.5%	100	100
56055 Lake Crystal	3,673	122	3.3%	97	46
56062 Madelia	2,544	82	3.2%	96	46
56050 Kasota	1,542	45	2.9%	95	46

Data Sources Utilized

Physical Activity Council Yearly Study on Sports, Fitness and Recreational Activity Participation

The Physical Activity Council (PAC) is a partnership of six of the major trade associations in US sports, fitness and leisure industries. Each year the partners pool resources to produce the definitive study of sports participation in the USA. The overall aim of the study is to establish levels of activity and identify key trends in sports, fitness and recreation participation in the USA.

During January and February of 2013, a total of 42,356 online interviews were carried out with a nationwide sample of individuals and households from the US Online Panel of over one million people operated by Synovate/IPSOS. A total of 15,770 individual and 26,593 household surveys were completed. The total panel is maintained to be representative of the US population for people ages 6 and older. Over sampling of ethnic groups took place to boost response from typically under responding groups.

The 2013 participation survey sample size of 42,356 completed interviews provides a high degree of statistical accuracy. All surveys are subject to some level of standard error — that is, the degree to which the results might differ from those obtained by a complete census of every person in the US. A sport with a participation rate of five percent has a confidence interval of plus or minus 0.21 percentage points at the 95 percent confidence level. This translates to plus or minus four percent of participants. A weighting technique was used to balance the data to reflect the total US population ages six and above. The following variables were used: gender, age, income, household size, region, population density and panel join date. The total population figure used was 287,138,000 people ages six and older.

PRIZM Geo-Demographic Segmentation from Nielsen

Nielsen PRIZM is the industry-leading consumer segmentation system that yields the richest, most comprehensive and precise consumer insights available. PRIZM combines demographic, consumer behavior, and geographic data to help marketers identify, understand and target their customers and prospects.

PRIZM defines every U.S. household in terms of 66 demographically and behaviorally distinct types, or "segments". PRIZM is linked to the surveys and panels of most major marketing databases in the USA, so the segmentation system enables you to target on virtually any purchase and media behavior.

PRIZM has the powerful ability to link household and neighborhood-level segment assignments to the marketplace. Because it describes household types of geographic areas, PRIZM can be used to evaluate markets, territories, service areas and other geographic areas.

Methodology

Below is a step by step procedure:

1. Each respondent in the PAC participation study is allocated a PRIZM code based on their address.
2. We then calculate the participation rate of each PRIZM code for each of the sports using the PAC survey
3. By applying the PRIZM participation rate to the PRIZM distribution for each zip code we project the number of participants for each sport for each zip code.
4. A data table is then generated for each drive time including:
 - the zip code and zip code description
 - the total population age 6+ for each zip code
 - the projected number of participants in that sport for each zip code
 - the participation rate for each zip code
 - an index comparing that zip code to the USA
 - a weighted index taking size of zip code into consideration.

Considerations for using the data

For this report we have used CORE participation. CORE is the following number of times each year:

Baseball	13+ times a year
Basketball	13+ times a year
Ice Hockey	13+ times a year
Soccer (Outdoor)	26+ times a year
Swimming on a Team*	1+ times
Softball (Fast-Pitch)	26+ times a year
Tennis	21+ times a year
Track and Field	26+ times a year
Volleyball (Court)	13+ times a year

* swimming on a team uses all participants.

The numbers generated are projections based on the types of households in each drive time. There will be some local and seasonal variations. Also the supply of facilities for each sport may lead to some local variations.

In addition to the absolute numbers of participants, users of the data should also consider the Index for each drive time. This is the best way to compare different drive times. A higher index shows that drive time has a much better supply of potential participants based on the type of households and their propensity to participate.

APPENDIX III

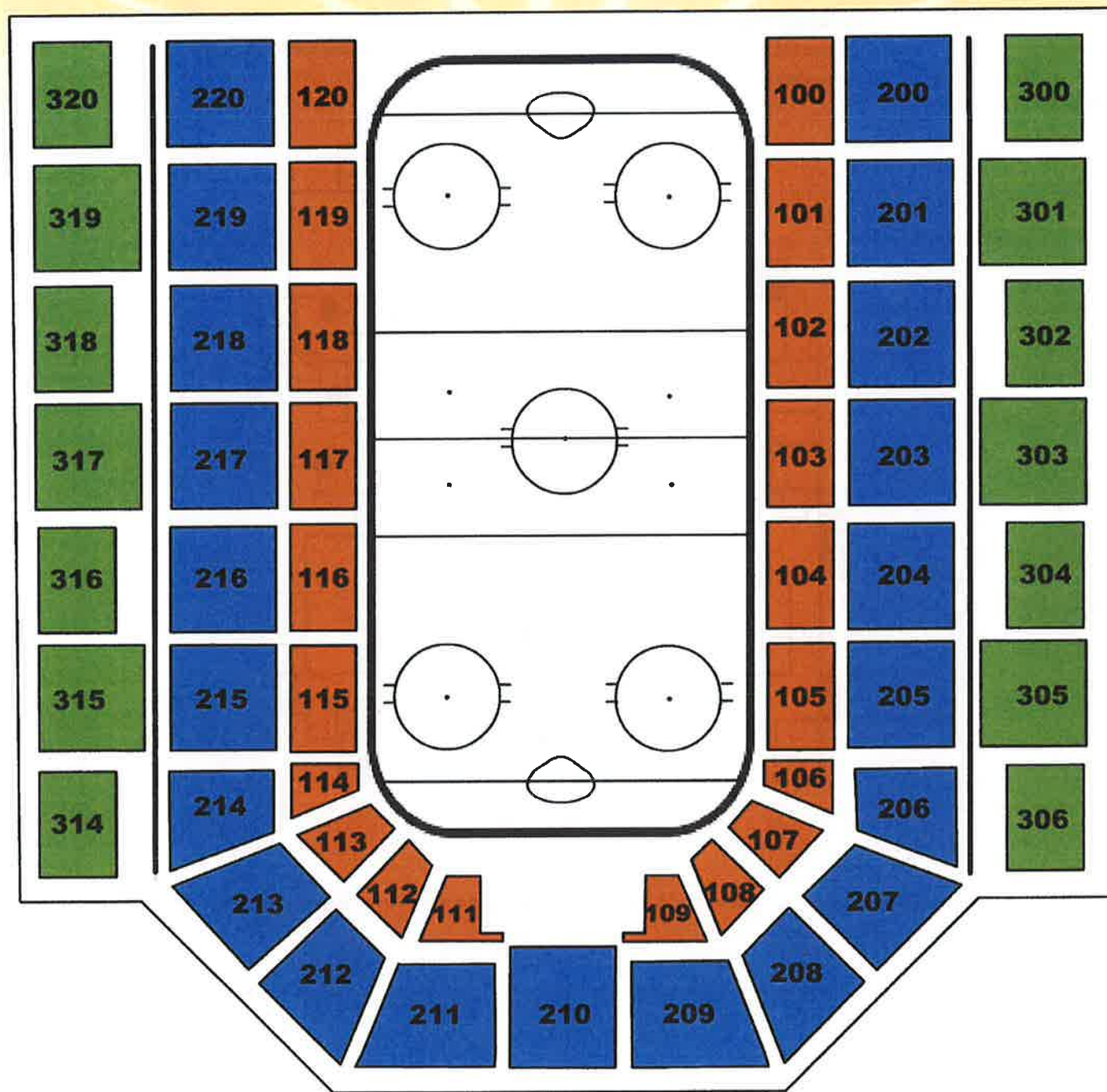
BuildingMap.pdf

The floor plan shows the UIC Arena as a large, rectangular building in the center-left. To its right is the CIVIC CENTER, which includes a large rectangular building and a smaller building labeled "CIVIC CENTER (STAIRS)". Below the CIVIC CENTER is the "CIVIC CENTER (STAIRS)" building. To the right of the CIVIC CENTER is the "CIVIC CENTER (STAIRS)" building. The plan also shows the "CIVIC CENTER (STAIRS)" building. The plan is oriented with North at the top.

Full House

Half House

Hockey



Full House

Half House

Hockey





[Convention Campus](#)
[Room Measurements](#)
[Building Map](#)
[Technology Center](#)

Verizon Wireless Center Facilities

Banquet Hall

The contemporary Banquet Hall, featuring high ceilings and high-tech audio/visual equipment, accommodates groups of up to 600. In the Banquet Hall, you will have access to four drop down screens and four ceiling-mounted LCD projectors, all which can be playing the same media or four different images at the same time. The room also has a sound system that can run multiple wired and wireless handheld and lapel microphones. The Verizon Wireless Center's cutting edge theatrical lighting system will also add extra detail to your event that you will not find at many other conference facilities.



Reception Hall



A historic landmark in Mankato, the Reception Hall building was built in the early 1900s as the First National Bank. The building, which has been restored with the original bank vaults and stained glass windows, stands as the cornerstone of the Verizon Wireless Center and blends the traditions of the Mankato area with the modern facility of today. The room offers a unique atmosphere to host a social hour or more intimate events.

Conference Center

In the Conference Center meeting planners have all the necessary ingredients to create a successful meeting from equipment rental to high-tech teleconferencing links to full-service catering.

The Conference Center features five smaller meeting rooms, ideal for breakout groups of 10 to 50 people. These rooms are conveniently located directly above the Banquet and Reception Halls. With its versatile meeting rooms, the Center has the perfect space for every meeting.



Arena

Cutting-edge acoustics and a superb sound system make the Verizon Wireless Center Arena one of the finest in the country. The arena features 8,300 seats for concerts and one of the largest floor capacities in Minnesota.

The thriving reputation and versatility of the Verizon Wireless Center Arena has been proven with sold-out concerts, important meetings, high-profile conferences, industry exhibits, exciting style show, fun kid shows, thrilling ice shows and live-action sports. The Olympic sized ice-floor hosts the Minnesota State University NCAA Maverick men's hockey team. Each year the Home and Builders Expo, the Wedding Show and the Holiday Expo come to the Verizon Wireless Center Arena. The Arena has also hosted some of the hottest stars touring today including Lori Linn, Aerosmith and Alan Jackson.

The knowledgeable staff at Verizon Wireless Center is dedicated to making each conference, show and sporting event a success. The Verizon Wireless Center's services include complete in-house marketing, promotion and group sales and a full in-house box office.

APPENDIX IV





July 29, 2009

Girls' Sports Pack Economic Punch

By [KATIE THOMAS](#)

CHATTANOOGA, Tenn. — Ten members of Kirsten Grant's family converged here last week to watch her play in a major youth softball tournament. Her mother, father, sister and brother had driven 13 hours with her from their home in suburban Toronto. Other relatives had traveled from as far as Salt Lake City. During lulls in play, they all went shopping and visited local attractions.

But last year, when Kirsten's older brother, Erik, played on a traveling baseball team, the experience could not have been more different. Parents rarely accompanied the team, he said, and the coach frowned on anything that distracted from the game. "No leisure activity," said Erik, 19. "It was eat, sleep and drink baseball."

As the popularity of youth tournaments has intensified over the past decade, a peculiar trend has emerged: girls' sporting events tend to attract more relatives and generate more revenue for tourism than similar events for boys. And that is drawing increased attention from economic development officials.

"There are far more people who will travel with 12-year-old girls than even 12-year-old boys," said Don Schumacher, executive director of the National Association of Sports Commissions, a trade group that advises communities on attracting sporting events. "And vastly more people will travel with 12-year-old girls than 18-year-old boys."

Although Schumacher said he and others did not keep statistics on the economic impact of girls' sporting events, many of his 500 members nationwide have reported anecdotally that such events are often more lucrative than those for boys. He and others mentioned several possible reasons, including a tendency among parents to be more protective of daughters; a heightened interest in girls' sports; and the increased attendance of mothers at games.

Mika Ryan, president of the Mercer County Sports and Entertainment Commission in New Jersey, said the potential for increased revenue from girls' sporting events was one factor her group evaluated when deciding which events to go after.

"We consider that because one of our priorities is to bring people to our county and put people in our hotels," she said. "It's not like parents love their sons any less, but it is a phenomenon that you see happening."

Mercer County hosted 24 youth sports tournaments last year.

One city poised to capitalize on the situation is Chattanooga, where the mayor, Ron Littlefield, recently unveiled an \$11.8 million softball complex aimed at returning the city to national prominence in the sport.

Kirsten Grant, a 17-year-old catcher, was here to compete in the National Softball Association Class A Eastern World Series, a fast-pitch event for girls' teams in four age brackets, from under-10 to under-16. The event drew 232 teams and roughly 7,500 people, and city officials estimated that visitors would spend \$3.6 million for the week.

Chattanooga once had a reputation for its quality softball facilities, but years of neglect left the fields in poor condition and the city without major tournaments. Littlefield, who was elected in 2005, wanted to revive the sport.

He worked with the city to build a softball complex on 85 acres next to a former landfill. The Summit of Softball complex has eight fields, with lighting, Webcams and awnings to shelter the bleachers from the sun. The Summit complex, along with a separate 2,500-seat softball stadium, has made the city increasingly attractive to groups like the National Softball Association, which operates tournaments nationwide, said Greta Hayes, the city's assistant director of parks. Already, she said, about 20 youth softball tournaments were scheduled for the city this season. The city held 72 youth sports tournaments last year.

City officials acknowledged that they did not set out to capitalize on the girls' sports market, yet they are grateful for the added revenue that it brings. Three new hotels have opened near the softball complex, and Littlefield said the income from sales and hotel taxes was "a real payback."

At the softball tournament, several parents said that they spent more money, and brought more family, to girls' sporting events.

"I would let my son go off on a team for 20 days, but I don't think I would let my daughter do that," Kirsten's mother, Rosalind Grant, said.

Others said that watching their daughters play was still more of a novelty and more exciting than watching a son. As a result, more relatives tended to travel with girls.

"I think probably with boys, it's expected," said Jay Davis, who traveled from Laurel, Del., to watch his daughters, Hannah and Rachel, as part of a group of 200 players and parents. With girls' games, he said, "you get the dads coaching, you've got the moms in the bleachers."

When both parents accompany a daughter, the other children often go, too. Before long, it is a summer vacation. Several families said they planned to spend \$1,500 to \$3,000 during the tournament.

"When you're here, you tend to do the tourist attractions, you're going to look for entertainment," said Melissa Dowd, who along with her husband traveled from Baton Rouge, La., to cheer on their daughter Abbie. When Abbie wasn't playing, the family visited the local aquarium, checked out the mall and ate in restaurants near Chattanooga's riverfront.

Of course, boys' events can also help local economies. The opening of several youth baseball camps near Cooperstown, N.Y., for example, has transformed the surrounding communities over the past two decades. Parents rent hotel rooms and eat in local restaurants while their sons attend camp, said Deborah Taylor, director of tourism for Otsego County, which includes Cooperstown. "It's a huge economic impact," she said.

But Bobby Dodd, the president and chief executive of the Amateur Athletic Union, a national youth sports

organization, is skeptical of financial comparisons.

"I have three granddaughters," Dodd said. "They love to shop. But I can tell you my boys darn near love to shop as much as the girls."

Dodd said that the youth sports events for boys and girls were faring well in the recession, perhaps because parents were reluctant to deny children their soccer or softball tournaments.

Several parents in Chattanooga agreed. Sue Wagner of Plymouth, Mich., traveled with her husband and younger daughter to watch Sarah, 14, compete. She said that her husband had been laid off from his job as a manager in a medical equipment firm in the fall, but that supporting their daughter was never in question. She persuaded her employer, a construction company, to sponsor Sarah.

If things are worse next year, she said, she and her husband will make it work again. "This is our family vacation," she said.

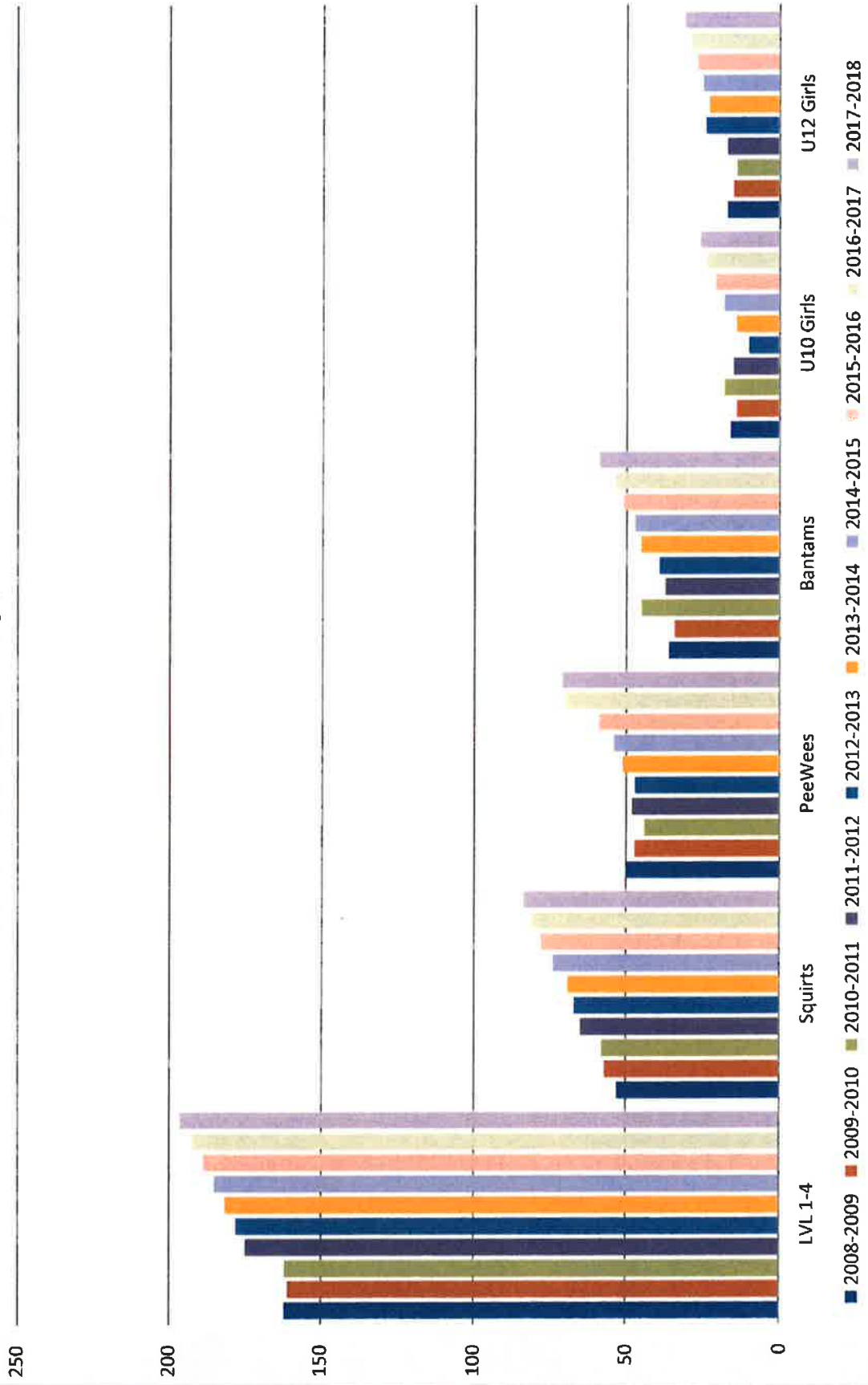
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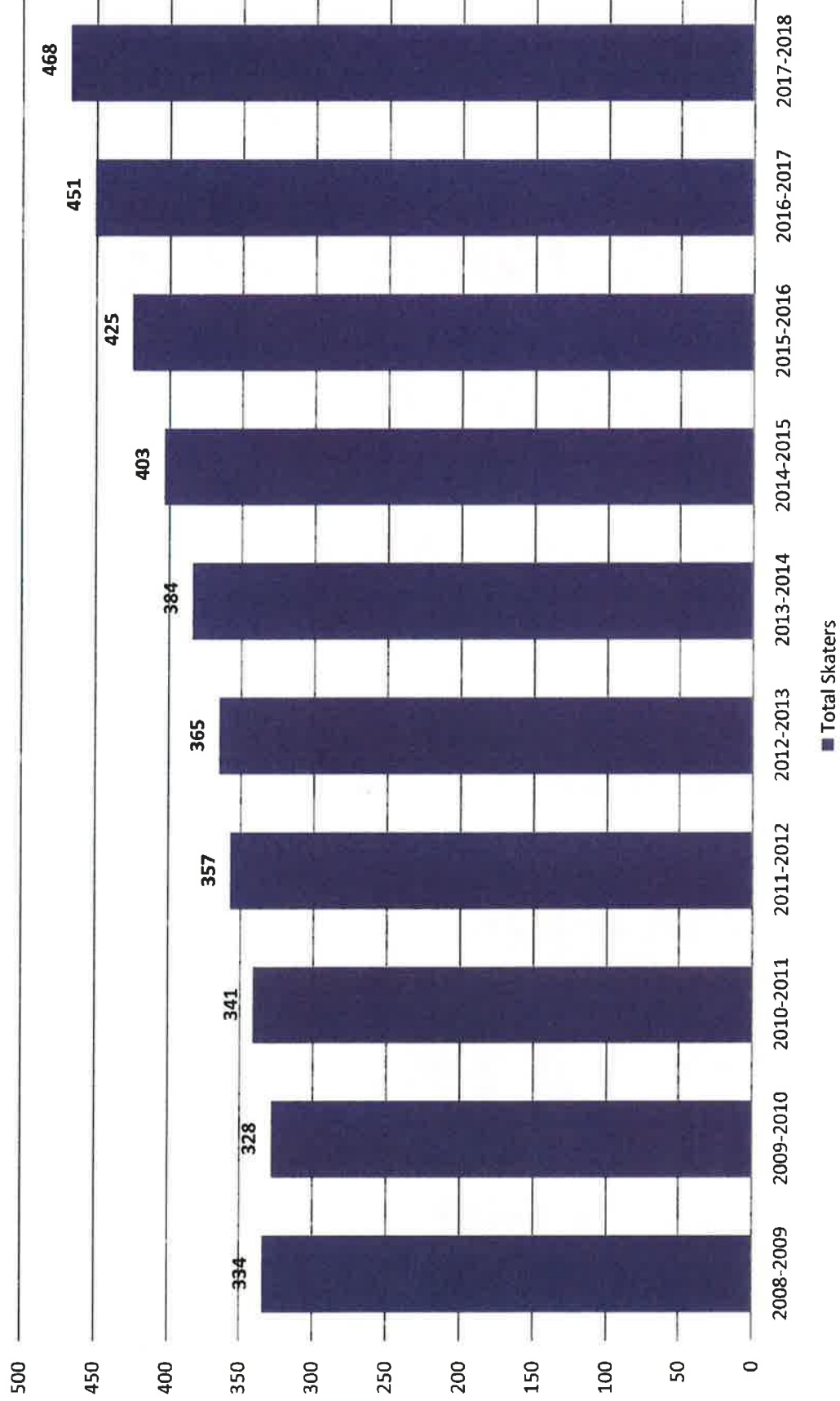
APPENDIX V



MAHA Skater Trend - By level



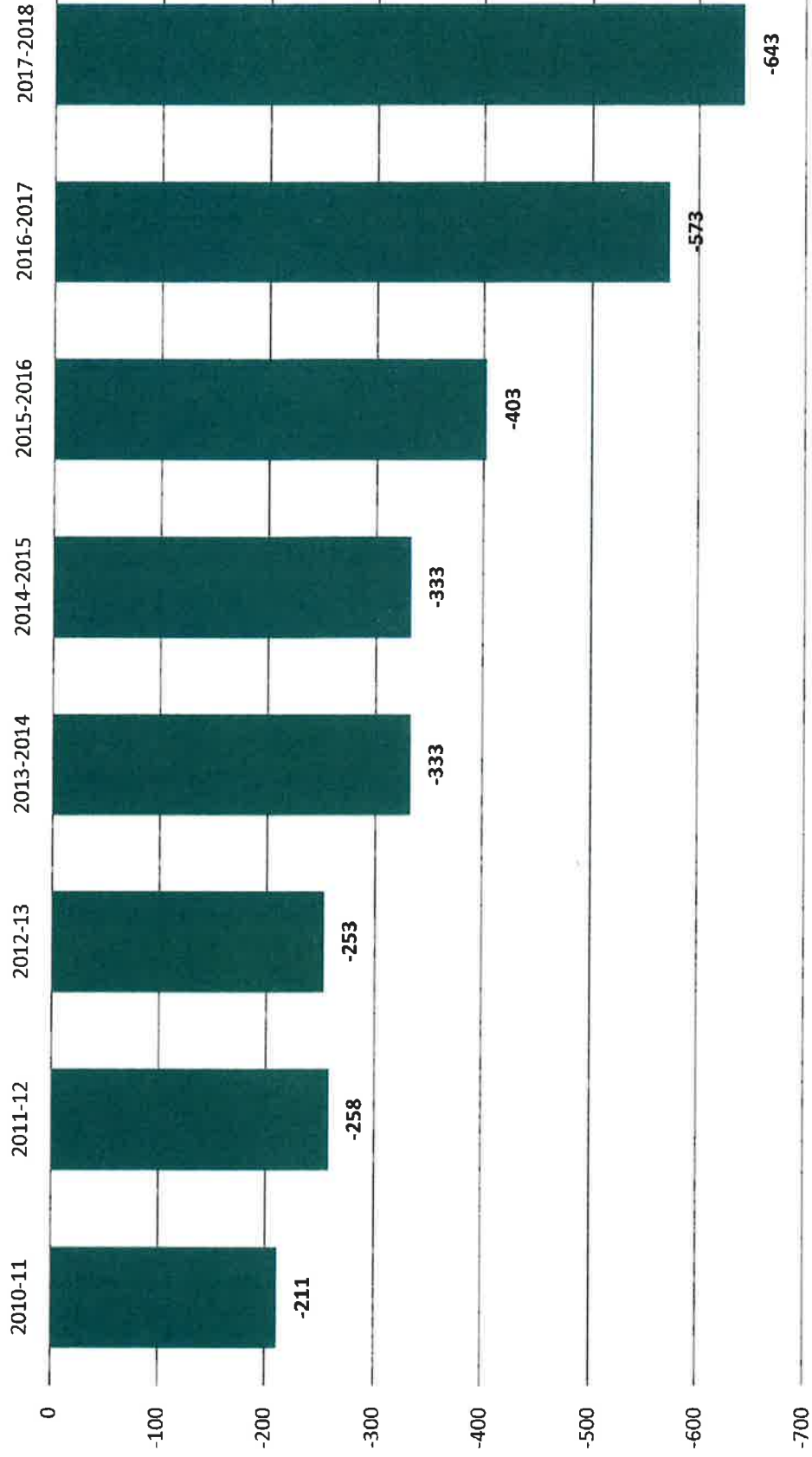
MAHA Total Skaters



MAHA Ice Deficiency From USA hockey Goal



MAHA Ice Deficiency From MAHA Goal



Mankato Area Hockey Association Player Growth Forecast

	2008-2009	2009-2010	2010-2011	2011-2012	2012-2013	2013-2014	2014-2015	2015-2016	2016-2017	2017-2018
LVL 1-4	162	151	162	175	178	182	185	189	198	197 2% Growth LVL 1-4
Squirts	53	57	58	65	67	69	74	78	81	84 Current Enrollment + growth during LVL 1-4
PeeWees	50	47	44	48	47	51	54	59	70	71 Current Enrollment + growth during LVL 1-4 2016 and out
Bantams	36	34	45	37	39	45	47	51	54	59 Current Enrollment
U10 Girls	16	14	18	15	10	14	18	21	24	26 Current Enrollment + growth during LVL 1-4
U12 Girls	17	15	14	17	24	23	25	27	29	31 Current Enrollment + growth during LVL 1-4 2016 and out
Total Skaters	334	328	341	357	365	384	403	425	451	468
Number of Teams - 13 max										
LVL 1-4	4	4	4	4	4	4.0	4.0	5.0	6.0	6.0
Squirts			4	5	5	5.3	5.7	6.0	6.2	6.5
PeeWees			3	3	3	3.5	4.2	4.5	5.4	5.5
Bantams			3	2	3	3.5	3.6	3.9	4.2	4.5
U10 Girls			1	1	1	1.1	1.4	1.6	1.8	2.0
U12 Girls			1	1	2	1.8	1.9	2.1	2.2	2.4

	Monday - Friday			Saturday		Sunday	
	Start	End	Time	Start	End	Time	
	5:00	6:00	1:00	7:45	8:45	1:00	12:00 1:00
	6:15	7:15	1:00	9:00	10:00	1:00	1:15 2:15 1:00
	7:30	8:30	1:00	10:15	11:15	1:00	2:30 3:30 1:00
	8:45	9:45	1:00	11:30	12:30	1:00	3:45 4:45 1:00
				12:45	1:45	1:00	5:00 6:00 1:00
			4:00	2:00	3:00	1:00	6:15 7:15 1:00
				3:15	4:15	1:00	7:30 8:30 1:00
				4:30	5:30	1:00	
				5:45	6:45	1:00	7:00
				7:00	8:00	1:00	
				8:15	9:15	1:00	
						11:00	
Hour per Week			20			11	7
20 Week Season			20			20	20
Total Hours Utilized			400			220	140
Total MAHA Hours on One Sheet of Ice			760				
MAHA Annual Hours Goal			1,120				
% of Goal met on One sheet of Ice			67.9%				

APPENDIX VI

Yearly - 2000		Yearly - 2001		Yearly - 2002	
Year	2000	Year	2001	Year	2002
1	100	1	100	1	100
2	100	2	100	2	100
3	100	3	100	3	100
4	100	4	100	4	100
5	100	5	100	5	100
6	100	6	100	6	100
7	100	7	100	7	100
8	100	8	100	8	100
9	100	9	100	9	100
10	100	10	100	10	100
11	100	11	100	11	100
12	100	12	100	12	100
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22	100	22	100	22	100
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96	100	96	100	96	100
97	100	97	100	97	100
98	100	98	100	98	100
99	100	99	100	99	100
100	100	100	100	100	100

Mankato Area Hockey Association

Funding proposal for third community ice rink

Since the second sheet of ice was added to All Seasons Arena in 1999, the ice shortage in Mankato has grown to the point where it is at the detriment of the development of the future growth for Mankato Area Hockey Association (MAHA), other ice users and the economic development of the community. Current facilities are operating beyond capacity which leaves no opportunity for future growth. MAHA is currently unable to meet the standard ice time requirements for our teams by 258 to 568 hours. Below are the highlights of a proposal to develop a third sheet of ice in North Mankato on the Caswell site with an equitable funding plan which distributes support and responsibility based upon increased community utilization and hockey utilization.

- The estimated cost of construction for a single sheet facility with the ability to add a second sheet in the future is approximately \$3,000,000.
- The current All Seasons Arena is jointly funded by the City of Mankato, City of North Mankato, Blue Earth County, City of Skyline and operated by School District #77.
- Currently, ASA operates at a positive margin with adequate cash flows to cover all required operations and maintenance.
- ASA also is able to support a \$40,000 per year bond payment which has eight years remaining.
- As forecasted (Attachment 1) by Paul Ostoff; a second sheet of ice will operate at a positive margin with adequate cash flows to cover all required operations and maintenance and support a \$60,000 per year bond payment.
- MAHA board approved an upfront cash payment of \$125,000 to be used towards the construction of a new facility.
- MAHA board approved the development of a minimum of \$750,000 community capital campaign to further contribute towards the construction of a new facility. Further discussion would be required as to how naming rights could be used to help enhance the fund drive success.
- MAHA's contributions equate to approximately 30% of the total cost of the construction.
- Local government support from the other ASA entities is sought for the remaining balance to be shared at the current share distributions. See attached.
- All funds raised for the project would be managed by one government unit whose responsibility it would be to supervise the bidding and construction process.
- Construction savings would be returned or credited to local governments on a prorated basis.
- MAHA would receive block schedule first rights during the months of October through March.
- MAHA would be provided the opportunity to manage and run the concession stand.

Third Ice Sheet Budget

Expenditures:

Salaries	\$30,000
Employee Insurance	\$8,000
Utilities	\$70,000
Property Insurance	\$8,000
Repairs and Maintenance	\$22,000
Travel	\$1,000
General Supplies	\$1,000
Resale Materials	\$8,000
Building Improvements	\$10,000
Dues and Memberships	\$1,000
Miscellaneous Expense	\$5,000
Total	\$160,000

Revenues:

Ice Rental	\$135,000
Public Skating	\$1,000
Memberships	\$2,000
Skate Sharpening	\$3,000
Vending and Concessions	\$9,000
Advertising	\$5,000
Community Ice rental	\$10,000
Misc. Rentals	\$5,000
Total	\$170.000

Budget is based on five months ice operation only with no other revenue sources considered.

Other possible revenue sources:

1. Building rental "corporate rentals"
2. Indoor soccer
3. Indoor Lacrosse
4. Indoor Baseball Practice
5. Indoor Softball practice
6. Flea Markets
7. Car Shows
8. Age events and shows
9. Additional ice rental
10. Roller Skating "roller derby"
11. Junior Hockey A or B
12. College hockey at Bethany College.
13. Intramural hockey.
14. Community Broom Ball leagues.

A building like this should be a popular site for other activities and events there would be few limits to programming and creating new programs. All of these activities could be added revenue sources for the facility.

With added revenues from a facility like this we should be able to support a \$60,000 dollar a year bond payment. Currently we have a \$40,000/yr bond payment. We have about 8 years left on that payment. When that payment is over the facilities should be able to commit about \$100,000/year to a bond payment. This is all based on current operational practices and staffing. With creative programming this should be a very conservative estimate.

Paul Ostoff

All Seasons Arena
Total Projected Debt Only
(No Existing Debt)

Government Unit	Percentage of Debt Share For Each Government Unit	Annual Debt Share For Each Governmental Unit	Total Debt Share For Each Governmental Unit
City of Mankato	64.7352%	101,946.00	1,529,190.00
City of North Mankato	21.7756%	34,297.00	514,455.00
Blue Earth County	12.7801%	20,125.00	301,875.00
City of Skyline	0.7091%	1,102.00	16,530.00
District 77	Annual Amount of \$ 96,515 or 38%	96,515.00	1,447,725.00
Total		253,985.00	3,809,775.00

- * Proposed Project Debt will be retired in fiscal year 2028
- * Assumes \$ 3,000,000 project @ 15 years @ 3% amortization
- * Assumes District 77 participates @ 38 % level as in previous project
- * Assumes the percentage formula established by District 77

**All Seasons Arena
Total Existing and Proposed Debt**

Government Unit	Percentage of Debt Share For Each Government Unit	Combined Annual Debt Share For Each Governmental Unit	Combined Total Debt Share For Each Governmental Unit
City of Mankato	64.7352%	144,674.00	1,913,742.00
City of North Mankato	21.7756%	48,672.00	643,830.00
Blue Earth County	12.7801%	28,560.00	377,790.00
City of Skyline	0.7091%	1,564.00	20,688.00
District 77	Annual Amount of \$ 96,515 or 38%	136,515.00	1,807,725.00
Total		359,985.00	4,763,775.00

- * Proposed Project Debt will be retired in fiscal year 2028
- * Assumes \$ 3,000,000 project @ 15 years @ 3% amortization
- * Assumes District 77 participates @ 38 % level as in previous project
- * Assumes the percentage formula established by District 77

1	2	3	4	5	6	7	8	9	10	11	12	13	14	15	16	17	18	19	20	21	22	23	24	25	26	27	28	29	30	31	32	33	34	35	36	37	38	39	40	41	42	43	44	45	46	47	48	49	50	51	52	53	54	55	56	57	58	59	60	61	62	63	64	65	66	67	68	69	70	71	72	73	74	75	76	77	78	79	80	81	82	83	84	85	86	87	88	89	90	91	92	93	94	95	96	97	98	99	100
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Small-scale event sport tourism: A case study in sustainable tourism[☆]

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ABSTRACT

Scholars have suggested that small-scale sports events may be a sustainable form of tourism development for communities (e.g., Higham, 1999). The purpose of this study was to examine six small-scale sports events and the work of a local sports commission in the context of the three pillars of sustainability: economic, social, and environmental. Small-scale sports events are largely competitor or parent-as-spectator based, often annual, and attract little media attention. The six events were: a marathon, Senior Games, archery, soccer, softball, and swimming. The participants or spectators of the six events were surveyed onsite or online over an 18-month period and additional data from the sports commission, where relevant, were included. Sample sizes ranged from $n = 68$ to $n = 447$. The results suggest that a small-scale sports event portfolio consistent with a community's infrastructure and human and cultural capital may be a viable form of sustainable tourism development.

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1. Introduction

In recent years, there has been growing critique regarding the sustainability of positive legacies from hosting mega sports events such as the Olympic Games and the FIFA World Cup (Smith, 2009). Concerns have been raised about the financial burdens (Lee & Taylor, 2006), the utility of the facilities after the event (Hiller, 2006), the environmental impacts (Chernushenko, 1996), and negative social legacies such as resident displacement (Hall & Hodges, 1996). Even the legacy of increased tourism in the post event years has been questioned (Brown, 2006). All of these raise issues about the efficacy of developing national sport tourism initiatives around large-scale sports events, a policy Swart (1998) has questioned in relation to South Africa. As the International Olympic Committee (IOC) and United Nations World Tourism Organization (UNWTO) begin a renewed focus on sport tourism and have introduced the concept of sustainability into the discussion (UNWTO International Summit on Tourism, Sport and Mega-events, February 2010), it is time to examine sustainable development through sport tourism. In his call for a more critical analysis of the impacts of mega sporting events such as the Olympic Games, Higham (1999) proposed that communities wishing to develop sport tourism should focus on regular season sports or hosting smaller scale sports events. He suggested, "the tourism and economic development opportunities presented by sporting occasions of a more modest scale are generally positive" (p. 87). He also introduced the idea that small-scale sport tourism may "comply with the principles of sustainable tourism more so than sporting mega events" (p. 87). To illustrate this suggestion Higham pointed out that small-scale sport tourism tends to generate a reliable flow of visitors, use existing infrastructure, be an appropriate size for the community, and to require very little in the way of public funding.

[☆] The data collection for the six events was funded by the Gainesville Sports Commission. The authors retain ownership of the data and have permission to use it for scholarly purposes. Research design, data collection, data analysis and interpretation were conducted by the authors.

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In the US, sports commissions have played an integral role in establishing small-scale sport tourism as a viable sector of an existing tourism industry, or providing a reason to visit a community if no prior tourism sector exists. Sports commissions may work at the state, county or city levels; they may be part of a convention and visitors bureau or may comprise a stand-alone non-profit agency. The National Association of Sports Commissions (NASC) was formed in 1992 with 13 members. Currently, there are almost 500 member organizations in the US, Canada, and Puerto Rico (www.sportscommissions.org). This is a testament to the interest in hosting small-scale sport tourism among communities in North America. However, very little empirical research exists that has focused on the tourism-related benefits and other impacts that small-scale event sport tourism can have for a community, or the idea that small-scale sport tourism is a form of sustainable development. Don Schumacher, current Executive Director of the NASC in a presentation to parks and recreation directors about the potential for economic development through small-scale sport tourism said, "A participant-based, or grass-roots event can produce hundreds of thousands of dollars in visitor spending," the national average being about \$300,000 (USD) (Schumacher, 2007). He also noted that some of the trends within these events include: "The younger the athlete, the more people travel with them;" "More people travel with girls/female athletes;" and "63% of the events held are for 12–17 year olds." Thus, economically, establishing a small-scale event portfolio for a community, especially one that encompasses youth sport seems to make sense. However, Schumacher, also emphasized that "the development of new facilities should be tied to unmet local needs, not tournaments/visitors," a comment that is compatible with principles of sustainable community development in that new infrastructure should only be built with a view to long-term use by the community. Thus, the purpose of this study was to examine the three pillars of sustainability (economic, social, and environmental) in relation to small-scale event sport tourism in the context of six small-scale sports events and the workings of a local sports commission over an 18-month period.

2. Conceptual framework

2.1. Sustainability

The terms sustainability, sustainable development, and sustainable tourism are often used interchangeably, however, Liu (2003) suggested that there are differences in the meanings associated with them. She proposed that sustainability is "state focused" in that it describes the condition of something over the long-term (p. 460), whereas sustainable development is process oriented and involves the management of something for the short and long-term. Indeed, the World Commission on Environment and Development (WCED, 1987) in the Brundtland Report defined sustainable development as "development that meets the needs of the present without compromising the ability for future generations to meet their own needs" (p. 43). Liu described sustainable tourism as encompassing all forms of tourism that are "compatible with and contribute to sustainable development" (p. 460). The UNWTO (1993) is more explicit and stipulates "sustainable tourism development meets the needs of present tourists and host regions while protecting and enhancing opportunities for the future."

The focus on tourists as a key part of sustainable tourism is an important point as the pervasive understandings of sustainable tourism tend to be environmentally and host population focused. Indeed, Cater (1993) added tourist satisfaction as a key dimension in developing sustainable tourism. Liu (2003) developed this idea further and she argued that tourism demand must be part of any sustainable tourism development plan as destinations cannot assume tourists will continue to visit, and that visitation numbers will grow. Tourist preferences and motivations change and increasingly tourism is subject to external forces such as natural disasters, terrorism, and economic recession, among others. Thus, while natural and cultural resources are important parts of the tourism product, it is important to understand that sustainable tourism development needs to encompass a broader vision. This vision should acknowledge that tourism development is dynamic and "requires simultaneously meeting the needs of the tourists, the tourist businesses, the host community and the needs for environmental protection" (Liu, 2003, p. 467). With this holistic approach the goals of sustainable tourism would be enhanced quality of life, satisfied tourists, a profitable tourism industry, and environmental protection.

Part of this broader conception of sustainability is the idea that sustainable development encompasses three dimensions, economic, social and environmental, or what is commonly called the triple bottom line, an accounting term coined by Elkington (1997). Originally the concept was used in corporate accountability, or what is now more commonly referred to as corporate social responsibility. Today it is an approach to sustainability that recognizes the interdependence of the three domains and has been adopted by the United Nations World Tourism Organization for sustainable tourism initiatives (UNWTO, 2004). As part of the 2007 Davos Declaration the need for urgent action in regards to climate change was raised and a quadruple bottom line with a fourth pillar of climate responsiveness was proposed (UNWTO, 2007). In continued collaboration with the United Nations Environmental Programme and other agencies, a call was made to integrate the mitigation of climate change into the "mainstream environmental activities" of these agencies (Simpson, Gössling, Scott, Hall, & Gladin, 2008). Other scholars have proposed an alternative fourth pillar, that of the institutional dimensions of policy and political governance (e.g., Cottrell, Vaske, Shen, & Ritter, 2007). Thus, while definitions of sustainability continue to be debated, this study works with the most widely accepted approach to sustainable tourism that of the triple bottom line of social, environmental, and economic (UNWTO, 2004), while acknowledging the need to address climate responsiveness as part of the environmental pillar.

Since the early 1990s, ecotourism has been touted as the archetypal form of sustainable tourism. However, misappropriations of the term ecotourism, misunderstandings of the principles of ecotourism, and a growing concern that all forms of tourism need to be sustainable (Liu, 2003) open the debate to the idea that other forms of tourism might be appropriate for sustainable tourism development including small-scale sport tourism. Indeed, O'Brien and Chalip (2008) suggest that the triple bottom line should underpin sport event leveraging strategies in an attempt to move the focus beyond economic development. This is consistent with UNWTO (2004) recommendations that a balance among the three pillars of sustainability must be established for sustainable tourism to be achieved within a community.

2.2. *Small-scale sports events*

Gratton, Dobson, and Shibli (2000) proposed a typology of sports events that can be used to provide a clearer understanding of the term small-scale sports event. Working within the UK context they identified four types of major sporting events: Type A encompasses mega events (e.g., Olympic Games and the FIFA World Cup); Type B includes the major spectator sports events held annually (e.g., Wimbledon or the Super Bowl); Type C events are irregular major sporting competitions drawing competitors and spectators (e.g., international level swimming event); and Type D major competitor driven events as part of the annual sporting calendar (e.g., National Collegiate Athletic Association championships excluding football and basketball in the US). For small-scale event sport tourism development however, another sport event category might be more appropriate. Thus, we concur with Wilson (2006) that small-scale event sport tourism constitutes a Type E and includes minor events where competitors may outnumber the spectators, they are often held annually, with little national media interest and limited economic activity compared to the large-scale events. Sporting events of this type held in smaller to medium sized communities tend to provide proportionately more economic benefits than if they were held in a larger city (Veltri, Miller, & Harris, 2009).

2.3. *Economics*

Evidence from studies stretching back almost 30 years suggests that hosting small-scale sport tourism events tends to provide economic value to the community with most expenditures coming from accommodation and food (Daniels & Norman, 2003; Horne, 2000; Veltri et al., 2009; Walo, Bull, & Breen, 1996). A consistent finding among all of these studies is that the economic benefits outweigh the costs. This is primarily due to the fact that the events use existing facilities, bring people to the community who would not have otherwise visited at that point in time (or ever), provide income for the hotels and restaurants, and benefit other businesses such as petrol stations and retail outlets. In terms of being a sustainable force economically, the key would be to develop an events portfolio for the community hosting events on a regular basis, thereby ensuring a consistent flow of tourists and expenditures (O'Brien & Chalip, 2008).

2.4. *Social impacts*

Fredline (2005) addressed the issue of sustainability in event sport tourism with a particular focus on the social impacts as part of the triple bottom line. Indeed, in the small-scale event sport tourism literature, authors frequently cite the social benefits of hosting the events as contributing to quality of life (Walo et al., 1996) and increased community spirit and pride (Horne, 2000; Veltri et al., 2009; Ziakas, 2010). These studies also point to the involvement of the community in the events as volunteers (Daniels & Norman, 2003; Horne, 2000; Walo et al., 1996; Wilson, 2006; Ziakas, 2010). Walo et al. noted that the use of volunteers and the use of existing facilities are two crucial factors in maximizing the social, physical, and economic benefits associated with hosting small-scale events. While Fredline (2005) categorized tourism impacts as a distinct but related domain, in our study, we followed the recommendations of the UNWTO (1993) and scholars such as Cater (1993) and Liu (2003) who suggested that the tourist should be part of a broader conceptualization of sustainability. In this sense, tourist perceptions, motivations, and satisfactions should be considered as part of the social pillar of sustainability. Another element of demand mentioned by Liu is the effects of external forces on demand such as terrorism, natural disasters, and the economy. Fyall and Jago (2009) suggested that to understand sustainability in relation to sport tourism, we need to understand the impacts of sport and tourism in terms of the triple bottom line, and to pay attention to the influence of the external environment on sport and tourism.

2.5. *Environment*

The study of the environmental impacts associated with event sport tourism is the most underdeveloped aspect in the existing literature. At the small-scale sport tourism level, the existing literature documents the use of existing facilities in communities as being the foundation of the viability of events as an economic development strategy (Daniels & Norman, 2003; Veltri et al., 2009; Walo et al., 1996; Wilson, 2006). One concern being raised in tourism more generally, and in the literature in relation to mega events, is carbon foot print. Collins, Jones, and Munday (2009) concluded that while management for ecological sustainability will become increasingly part of event organization, currently it is hard to find adequate measures of their success. Ostensibly, small-scale events may have a lower carbon footprint as the majority of participants tend to be drawn from the local (non-tourists) and regional visitors (within a four hour drive).

2.6. Purpose of the study

This study examined the three pillars of sustainability, economic, social, and environmental within the context of small-scale sports events using a combination of the following data types:

Economic indicators. These were accessed by the following research questions: (1) On average how many days/nights did event participants and spectators stay? (2) How many hotel room nights did each event generate? (3) What were the expenditure patterns for the day and overnight participants and spectators for each event? (4) What was the overall direct spending impact associated with each event?

Social indicators. These were accessed by the following research questions: (1) What other activities did the event participants and spectators take part in? (2) What were the primary motivations for attending the event? (3) Overall, what were the satisfaction levels of the participants and spectators with the event? (4) In what ways were local residents involved?

Environmental indicators. These were accessed by the following research questions: (1) What types of facilities were used? (2) In what ways is the sports commission involved in the promotion of environmental quality within the community?

3. Methods

3.1. Study site

Gainesville, Florida is a university town with a population of 108,655 (US Census, 2010) and 5500 hotel rooms. During the academic year (August to May) university events, particularly football in the fall, tend to dominate the events calendar for the town. As part of the wider event portfolio for the city, the Gainesville Sports Commission (GSC) organizes an average of 35 events per year attracting 54,000 adult and youth visitors to the city, contributing about \$20 million in direct spending, and 36,000 hotel room nights (GSC, 2010). The mission of the GSC is to "promote tourism through sport" with the goal of providing economic development for the community.

3.2. The six events

The six events studied were: a marathon/half marathon, Senior Games, archery, youth soccer, youth softball, and youth swimming held between February 2007 and December 2008 and were all organized by the GSC. The first three events were for participants over 18 years old (adult). The marathon was in its second year, having been reinstituted the year before (the last marathon was held in 1983) and attracted 932 participants. The Senior Games is a multisport event for participants aged 50 and over. In 2007, 292 athletes took part. The archery tournament is part of the Archery Shooters Association Pro/Am tournament and had been hosted 13 times by the GSC. The tournament attracted more than 1000 archers of all levels primarily from the southeastern US.

The last three events are youth sports events. The soccer tournament in its third year was for girls under 9–18 years of age. The softball tournament was part of the state level Babe Ruth series for girls aged between 6 and 18 years and was being hosted for the first time. The swimming event is an annual meet and attracts participants aged between 6 and 22 years from all over the state.

3.3. Data collection for the six events

The participants (if over age 18) or spectators (youth event) of the six sports were surveyed during, or just after each event. Intercept surveys at the event was the primary method, although online surveys were used for two events.

For the onsite intercept surveys, trained graduate student interviewers attended the events over multiple days. The Florida state definition for a tourist is an individual who crosses the county line in pursuit of recreation. The study results represent sport tourists, both day-trippers and overnight visitors that were either active event (athletes) or passive event (spectators) sport tourists. Only one participant per travel party completed a questionnaire. Thus, while the sub-sample sizes are relatively small, the responses typically represent a travel party of 2 or 3, particularly for the youth events. Response rates for the onsite surveys ranged from 83.5% (softball) to 91.4% (archery).

For the marathon and the Senior Games, the majority of the participants registered for the event online and so on-line surveys were used. The online and mail surveys ($n = 106$ Senior Games participants without e-mail addresses) were developed in accordance with Dillman's (2000) tailored design method. E-mails or letters introducing the study, requesting participation and the URL for the online questionnaire were sent to the participants. Two follow-up e-mails or post cards were sent one and two weeks after the initial mailing. For the marathon participants the response rate was only 22.9% and may have reflected relying on a third party provider to send out the e-mail request. For the Senior Games the overall response rate across both survey methods was 62.2%.

3.3.1. Other data sources

Information collected by the GSC about each event was used as supplementary data. The sports commission receives hotel night data from most commercial accommodation providers. They also collect expenditure data using a short

questionnaire and use the NASC formula to calculate direct spending impact (Doshi, Schumacher, & Snyder, 2001). This formula utilizes current spending estimates by youth and adult visitors provided by the Florida Sports Foundation (www.flasports.com). The six event surveys conducted by university researchers provided data on wider range of concepts than that regularly obtained by the GSC. The GSC data acted as a triangulation method for the primary survey data.

3.4. Instruments for the six events

Fixed choice self-administered questionnaires were used across all of the events. All of the questionnaires asked similar information and were typically divided into sections containing items measuring purpose of trip (Is the event the primary purpose of your trip to Gainesville? 1 = yes, 2 = no); residency (Are you a resident of Alachua County? 1 = yes, 2 = no); length of stay (How many days and nights in total are you staying in Gainesville including your event participation days and nights? Open-ended response); accommodation type (If staying in Gainesville, what type of accommodation are you using? 1 = Here for the day only, 2 = Hotel/motel, 3 = Bed and Breakfast, 4 = Home of relative/friend, 5 = RV/Camping, 5 = Other); primary motives (The following is a list of reasons you may have for attending the event. The eight motives included socializing, and enjoyment); other activities taken part in during the visit (list of 12 activities including shopping, visit family/friends, eating out); prior visits to the community (Over the past five years, how many times have you taken a trip to Alachua County to attend a sports event?); event evaluation (e.g., Overall event organization 1 = Extremely dissatisfied and 7 = Extremely satisfied); and demographics. Most of the items were measured at the nominal or ordinal levels. These types of questions are commonly used in surveys of sports events (e.g., Daniels & Norman, 2003; Veltri et al., 2009) and more widely in the tourism literature on events and festivals (Getz, 1991) as such questionnaire items provide information about the activities, motives, and other tourism related behaviors of visitors. Another common purpose of such surveys pertains to visitor expenditures (Daniels & Norman, 2003; Gratton et al., 2000). In this study, expenditure data were broken into categories (e.g., accommodation, food and beverage and souvenirs). Participants were asked to estimate the money they and their travel party had spent in the host community over the course of their visit. At the start of 2008, the effects of an impending economic recession were being felt on the tourism industry. Thus, two contingency style questions were included on the archery, softball, and swimming questionnaires to assess the effects of rising petrol prices on decisions to attend the event. These items relate to the call by Fyall and Jago (2009) to understand the effects of external factors such as economic recession on the sustainability of sport tourism.

3.5. Data analysis for the six events

The data were analyzed using descriptive statistics: frequencies, percentages, means, medians, and standard deviations. Consistency in question structure and wording across the event questionnaires was applied to rectify compatibility issues where possible.

3.6. Participant characteristics for the six events

The focus of this study was on the active or passive event sport tourists who took part in the events. The sample sizes are as follows: marathon ($n = 68$), Senior Games ($n = 240$), archery ($n = 233$), soccer ($n = 447$), softball ($n = 158$), and swimming ($n = 212$). The majority of the passive event sport tourists (spectators) for the youth events were female, while the majority active event sport tourists in the adult sports competitions were male, except for the marathon where 50.7% of the respondents were female and 49.3% were male. The average age was fairly similar (about 42 years) across all events except for the Senior Games where the mean age was 69 years ($SD = 8.81$ years) which reflects the age 50 prerequisite for taking part in that event. For the adult sports events, the participants were athletes taking part in the event. For the youth events the majority of the spectators were parents (soccer 83.3%; softball 80.4%; swimming 90.4%), followed by other relatives (soccer 4.2%; softball 17.6%; swimming 5.7%). Across all events, most participants indicated average annual incomes of \$40,000 (USD) and above with the majority of the soccer (72.7%) and swimming spectators (55.6%) indicating annual household incomes of \$80,000 (USD) or more. Income was not measured for the marathon participants. In terms of education, with the exception of the Senior Games, where education level was not requested, the majority of participants were college educated. Across all events, the majority of participants and spectators were white.

4. Results

4.1. Economic indicators

The number of nights and days spent at the destination varied with the duration of the event (Table 1). The mean number of days ranged from 1.30 to 3.58 and the mean number of nights ranged from 1.27 to 3.33. The Senior Games attracted the highest number of day-trippers (74.6%), whereas, for the other adult sports event, archery, almost all of the participants stayed overnight (94.2%). For the youth events, softball spectators had the highest prevalence of day trips at 28.2%, whereas, 78.5% of the soccer spectators, and 82.9% of the swimming spectators reported staying overnight.

Table 1
Patterns of time spent in the community and type of accommodation used.

	Adult sports events			Youth sports events		
	Marathon (n = 68)	Senior Games (n = 240)	Archery (n = 233)	Soccer (n = 447)	Softball (n = 158)	Swimming (n = 212)
Trip type (%)						
Day trip	19 (27.9)	178 (74.6)	14 (5.8)	96 (21.5)	44 (28.2)	36 (17.1)
Overnight	47 (72.1)	62 (25.4)	227 (94.2)	351 (78.5)	112 (72.8)	175 (82.9)
# days & nights M (SD)						
Days	— ^a	1.30 (0.58)	2.42 (0.85)	2.74 (0.98)	3.58 (0.93)	2.73 (0.27)
Nights	—	1.27 (0.14)	2.48 (0.90)	2.03 (0.98)	3.33 (1.26)	2.41 (0.06)
Accommodation (%)						
Hotel/motel	20 (40.8)	21 (77.8)	206 (90.7)	372 (80.0)	107 (95.5)	162 (92.6)
B&B	0 (0.0)	—	3 (1.3)	5 (1.1)	0 (0.0)	2 (1.1)
Friend/family home	26 (53.1)	2 (7.4)	12 (5.3)	11 (2.4)	3 (2.7)	7 (4.0)
RV/camping	1 (2.0)	3 (11.1)	6 (2.6)	3 (0.6)	2 (1.8)	4 (2.3)
Others	2 (4.1)	1 (3.7)	0 (0.0)	4 (0.9)	0 (0.0)	0 (0.0)
Room nights ^b	414	63	3415	4545	3500	3007

^a Measured with a multiple choice question (0 night: n = 6; 1 night: n = 16; 2 nights: n = 9; 3 nights or more: n = 20).

^b Data provided by hotels to GSC.

Table 2
Expenditures of day-trippers and overnight visitors.

Day trippers	Adult sports events (\$)			Youth sports events (\$)		
	Marathon (n = 19)	Senior Games (n = 171)	Archery (n = 14)	Soccer (n = 96)	Softball (n = 43)	Swimming (n = 33)
Total expenditure (US\$)	95.64	169.76	123.13	206.45	199.95	147.63
Daily expenditure (US\$)	95.64 ^a	169.76 ^a	123.13 ^a	206.45 ^a	199.95 ^b	147.63 ^b
Overnight visitors	Adult sports events (\$)			Youth sports events (\$)		
	Marathon (n = 45)	Senior Games (n = 62)	Archery (n = 221)	Soccer (n = 351)	Softball (n = 109)	Swimming (n = 164)
Total expenditure	316.57	275.66	560.43	649.87	828.94	586.64
Daily expenditure	158.29 ^c	137.83 ^c	186.81 ^d	216.62 ^e	207.23 ^f	195.55 ^d

Note: The sample size (n) of each event is not the same with that of non-residents due to missing data. Daily expenditure was calculated by dividing total expenditure by the median value of stay days (1 day).

^a The median value of travel party size was 2 persons.

^b The median value of travel party size was 3 persons.

^c The median value of stay days and travel party size was 2 days and 2 persons respectively.

^d The median value of stay days and travel party size was 3 days and 3 persons respectively.

^e The median value of stay days and travel party size was 3 days and 2 persons respectively.

^f The median value of stay days and travel party size was 4 days and 4 persons respectively.

The majority of participants and spectators stayed in hotels generating 14,980 total hotel room nights across the six events. The number of hotel room nights ranged from 63 for the Senior Games to 4545 for soccer. Only 40.8% of the marathon participants reported staying in a hotel. This event had the highest portion of participants across the six events staying with friends and family (53.1%). The percentage of respondents staying in a hotel/motel ranged from 40.8% (marathon) to 95.5% (softball).

The median daily expenditure across events ranged from \$95.64 to \$206.45 (USD) for day-trippers and from \$137.83 to \$216.62 (USD) for overnighters (Table 2). The average travel party size ranged from 2 to 4 people. In terms of total expenditure across the event for those who spent the night in the community, the softball spectators reported the highest at \$828.94, followed by soccer at \$649.87 (USD). For the adult sports events, the archery participants reported the highest total expenditures at \$560.43 (USD).

For three events, archery, softball, and swimming, participants were asked about the influence of the rising price of petrol on their travel plans to attend the respective tournaments. Just over half of the archery participants (50.6%) reported that the price of petrol had influenced their travel decisions with comments such as choosing to participate in less events (n = 35) and carpooling to save money (n = 12) mentioned. Petrol prices peaked to record high prices in Florida on July 15th, 2008 just after the softball event at \$4.05 (USD) per gallon (www.gasbuddy.com). Just under 72% of spectators reported that petrol prices had not influenced their travel plans for attending the tournament. Of those who had changed their plans, spending less money on other activities (n = 9) and carpooling (n = 7) were cited. The most frequent sentiment was that they would be willing to travel irrespective of petrol prices so that they could support their daughters (n = 58). Among the swimming

Table 3
Participant motivations.

	Adult sports events			Youth sports events		
	Marathon ^a (n = 68)	Senior Games (n = 240)	Archery (n = 233)	Soccer ^a (n = 447)	Softball (n = 158)	Swimming (n = 212)
Competition	–	104 (63.0) ^b	218 (91.2)	–	135 (85.4)	165 (77.8)
Enjoyment	–	18 (11.0)	156 (65.3)	–	85 (53.8)	32 (15.1)
Socializing	–	5 (3.0)	108 (45.2)	–	37 (23.4)	25 (11.8)
Support my child	–	–	–	–	48 (30.4)	155 (73.1)
Challenge	–	–	137 (57.3)	–	43 (27.2)	39 (18.3)
Relaxation	–	1 (1.0)	78 (32.2)	–	18 (11.4)	6 (2.8)
Exercise	–	16 (9.7)	53 (22.2)	–	10 (6.3)	16 (7.5)
Novelty	–	–	19 (7.9)	–	7 (4.4)	7 (3.3)
Other	–	18 (10.9)	15 (6.3)	–	0 (0.0)	3 (1.4)

Note: Measured with a multiple response question.

^a The questionnaire did not include the motivations items.^b The numbers in parentheses are %.

spectators, 78.1% indicated petrol costs had not influenced their plans to attend the swim meet (by this time petrol prices had decreased to \$1.79 December 3rd, 2008). While some spectators reported they had attended more local swim meets ($n = 16$) and had car pooled ($n = 4$), again the most commonly reported sentiment was that as long as their children were competing, they would not be influenced by petrol prices ($n = 36$). The overall direct spending impact ranged from \$28,040 (Senior Games) to \$2,302,298 (soccer) with a total of \$6,105,210 (USD) for all 6 events. The youth events of swimming (\$1,115,048) (USD) and softball (\$1,061,848) (USD) had high overall direct spending impacts for the community as did archery (\$1,204,488) (USD).

4.2. Social indicators

Across all events the top activity was eating out ranging from 51.2% (Senior Games) to 90.9% (swimming). Among the adult sports events, shopping was the next frequently cited activity (21% Senior Games; 37.1% archery). Among the youth events, shopping was also the second most ranked activity (56.4% soccer; 52.3% softball; 50.9% swimming), followed by attending a sports event at the university (19.1% softball; 14.2% swimming). For the soccer participants, a special event was organized by the university soccer team, and 53.2% reported attending this. The softball spectators also reported visiting friends and family (17.1%), as did 10.8% of those attending the swimming event.

When asked about the primary purpose of their trip, between 94.3% (softball) and 98.8% (Senior Games) indicated that the event was their primary trip purpose. When asked about their motivations, the primary motivation for attending or participating in the event was the competition (Table 3). Over 90% of the archery participants cited the competition, followed by enjoyment. For the softball and swimming events the motive "to support my child" was included and 73.1% of the swimming spectators cited this. Among the adult sports participants, 45.2% of the archers reported socializing as a motive.

Most of the event participants and spectators had visited the community before from a low of 29.4% for the marathon to a high of 83.9% for the Senior Games (Table 4). Among the soccer spectators proportionately there were also many first time visitors of whom only 39.1% indicated they had visited the host community previously. When asked about intent to return to the community for vacation, the means ranged from $M = 6.31$ (swimming) to $M = 5.83$ (soccer).

Table 4
Previous visits, event satisfaction and revisit intentions of participants.

	Adult sports events			Youth sports events		
	Marathon (n = 68)	Senior Games (n = 240)	Archery (n = 233)	Soccer (n = 447)	Softball (n = 158)	Swimming (n = 212)
Previous visit (%)						
Yes	13 (19.1)	138 (83.9)	190 (79.5)	177 (39.1)	131 (83.2)	137 (79.7)
No	55 (80.9)	27 (16.1)	49 (20.5)	276 (60.9)	27 (16.8)	75 (20.3)
Satisfaction ^a M (SD)						
Event administration	– ^c	5.71 (1.41)	– ^c	5.78 (1.15)	5.29 (1.10)	5.93 (1.15)
Event organization	–	5.66 (1.60)	–	5.94 (1.02)	5.21 (1.13)	5.77 (1.00)
Facilities quality	–	5.70 (1.52)	–	5.66 (1.26)	5.06 (1.36)	5.78 (0.96)
Satisfaction ^a M (SD)	5.82 (0.84)	5.81 (1.41)	5.39 (1.01)	5.95 (1.01)	5.33 (1.04)	5.88 (0.97)
Revisit intention ^b M (SD)	– ^d	6.28 (1.24)	6.23 (0.81)	5.83 (1.49)	5.99 (1.19)	6.31 (1.13)

^a Overall satisfaction was measured by using a 7 point scale (1 = Extremely dissatisfied to 7 = Extremely satisfied).^b Measured using a 7 point scale (1 = Extremely unlikely to 7 = Extremely likely).^c Event satisfaction items not included.^d Measured with a yes–no question (yes = 87.3%, no = 16.7%).

Regarding satisfaction levels with the event, the responses revealed high satisfaction levels with all 6 events ranging from $M = 5.33$ (softball) to $M = 5.95$ (soccer). In terms of overall satisfaction, means ranged from $M = 3.9$ (archery) to $M = 5.82$ (marathon). All events were rated high for organization ($M = 5.21$, softball to 5.94 soccer) and quality of the facilities ($M = 5.06$ softball to $M = 5.78$ swimming). All of the events used volunteers from the local community for a total of 275 people across all events. The marathon used $n = 100$ volunteers, the Senior Games $n = 20$, Archery $n = 20$, soccer $n = 100$, softball $n = 15$, and swimming $n = 20$.

4.3. Environmental indicators

All events used existing facilities and city infrastructure. The marathon used the city streets early on a Sunday morning. The Senior Games is a multisport event and used sports facilities all over the city such as gymnasiums for basketball, local parks and recreation swimming pools and tennis courts, and for cycling the Gainesville Raceway (a professional motor sports venue). The archery tournament used the grounds surrounding the Gainesville Raceway. The soccer event used venues spread across neighboring towns and the university. The softball tournament used a private sports park as its venue, and the swimming event used the university Olympic size regulation pool. When asked about recycling policies at these venues the Executive Director said "Most of the rented facilities have recycling." The GSC relies on the recycling practices and policies in operation at the various venues rather than implementing their own recycling program at each event.

In terms of the promotion of environmental quality, during the time period of the study the Executive Director of the GSC together with a former elected city official spearheaded the Wild Spaces and Public Places sales tax initiative. The goal was to raise funding for improvements for parks and recreation facilities and to provide funds to purchase ecologically valuable land in the county. By December 31st, 2010, \$32.1 million (USD) had been raised (Curry, 2011). Over 82% is allotted for public projects and various city parks and recreation facilities have already received funding for improvements, and 17.6% is targeted for wild spaces projects and has been used to acquire environmentally sensitive land (Alachua County, 2010).

5. Discussion

This study examined the proposition that small-scale event sport tourism and the workings of a local sports commission constitute a form of sustainable tourism development for the host community. In reviewing the data collected from six events over an 18-month period, in addition to information provided directly by the sports commission, the three pillars of sustainable development and tourism were examined.

For sustainable tourism, the economic pillar refers to the impact of tourism on the financial wellbeing of the local community, often indicated by jobs and injections of money from outside (Henderson, 2007). While the sports commission provides few full-time jobs, the economic benefit from their work comes in the form of attracting active and passive event sport tourists to the community. Expenditures by the participants on hotels, restaurants, and other goods and services constitute direct economic impact for the community (Veltri et al., 2009). Although as Daniels and Norman (2003) point out, the structure of an event can also influence participant length of stay. For example, among the adult events, the archery participants averaged two nights compared to the marathon and Senior Games participants where many of them were day-trippers. Some of the difference in these patterns can be attributed to the nature of the event in that the archery tournament was a regional event and drew participants from a wider geographical area, and the length of the event encouraged overnight stays. In contrast, the marathon was only in its second year and was a one-day event. The Senior Games was one of several opportunities offered at the state level for athletes to qualify for the state level games to be held later that year, and tended to draw from a smaller geographical area. The GSC had experimented with ways to increase the length of stay of the Senior Games participants by introducing other attractions into the event experience. Despite the use of an event augmentation strategy designed to capitalize on the synergy between economic and social leveraging (Chalip, 2006), almost two thirds of participants were day-trippers and did not arrive until the day of the event. In subsequent years, the marathon has also been increased to a two-day event with other running competitions on the day before the actual marathon to encourage wider participant base, and possibly longer stays in the community (Gibson, Chang, Kang, & Jun, 2009). Moreover, as the marathon becomes established on the annual running calendar and builds a reputation as a good event, it may draw participants from further afield necessitating overnight stays.

Veltri et al. (2009) suggested that small-scale sport tourist events have the potential to provide more economic benefit for smaller communities than larger events as they have an overwhelmingly positive impact with very little strain on the local community resources. In this study, all of the events generated substantial overall direct spending amounts from the expenditures of the event participants. The soccer and softball events generated the highest expenditures among all of the events. This provides support for Daniel and Norman's (2003) finding that youth sports tend to generate more positive economic impact among small-scale sports events. Moreover, each of these events was for girls and also supports Schumacher's (2007) observations that girls' sports events tend to be associated with higher expenditure patterns. Among the adult events, the archery tournament generated the highest expenditures likely due to the length of stay in town as discussed above.

There is some evidence of Fyall and Jago's (2009) call to examine external factors that may affect sport tourism and the economic benefits that accrue from hosting these events. Indeed as Liu (2003) cautioned, the sustainability of tourism can be negatively impacted by various external factors such as an economic recession. Half way through the study period the effects

of an economic recession and inflation were becoming evident and so event participants were asked about the impact of rising fuel prices on their decisions to attend this, and other events. Among the youth sports events, the overwhelming response was that the parent's responsibility for the happiness and well-being of their child was more important than rising prices. Thus, if they could, the participants indicated they would continue to support their child's sports participation by cutting back on other expenditures. In contrast, among the archers there was some concern that they would not be able to continue their participation. Indeed, there was already evidence that some archers had reduced travel associated with their sport. In terms of consistency of tourist flows (Higham, 1999) as a measure of sustainability, it may be that in times of economic uncertainty communities focus more on youth sports in their event portfolio as parents may be more likely to continue to fund their child's travel to take part in various tournaments.

Overall, in terms of the economic dimension of sustainability it appears that the work of the GSC and their focus on small-scale sport tourism provide positive economic benefit for the community in terms of hotel room nights and expenditures on other goods and services at times when there are few other tourists in the community (Daniels & Norman, 2003; Veltri et al., 2009). Even when over or underestimation is taken into consideration, the cost-benefit (Mules & Faulkner, 1996) of hosting these events for the community is still positive on the economic dimension. The supplemental data from the GSC also helped to triangulate the data from the event surveys.

The social dimension of sustainable tourism often focuses on the positive and negative effects on the local people. However, using a more holistic definition of the term social, analyses of the social dimension encompass both the local people and the tourist experiences (Cater, 1993; Liu, 2003; UNWTO, 1993). In terms of the sport tourists, the vast majority indicated that the primary reason for their visit was to take part in the event and as such further supports the contention that small-scale sport tourism is a way of managing tourist flows in a community (Horne, 2000). In turn, this type of tourism can be used to offset seasonal downturns (Higham & Hinch, 2002), thereby, contributing to the sustainability of a tourist industry (Liu, 2003). However, part of tourist demand and social sustainability is the understanding of the relationship between tourist motivation, the ability of a destination to meet those motives, and the overall satisfaction of tourists with their visit (Beioley, 1995; Cater, 1993). The primary motivation reported by both spectators and athletes across the six events was competition, followed by enjoyment. Among the youth events, parents cited "supporting my child," and among the archery participants, in particular, socializing was mentioned.

Tourist satisfaction is related to the congruency between motives and the extent to which a tourist experience satisfies those motives (Gnoth, 1997; Yoon & Uysal, 2005). Indeed, Beioley (1995) identified tourist satisfaction with a destination as one of four characteristics contributing to sustainable tourism. Across the six events, participants reported high satisfaction with both the event and the community as an event tourism destination. Event satisfaction was related to such facets as the quality of the sports facilities, officiating, and execution of the event. In terms of the destination itself, most of the event participants rated the community highly. Intent to take part in the event again (revisit) and to recommend the event and the destination to others is related to tourist satisfaction (Bigné, Sánchez, & Sánchez, 2001). These measures of loyalty are particularly important to the work of a local sports commission like the GSC as their portfolio includes two-thirds of events that take place on an annual basis. Therefore, tourist satisfaction is of paramount importance as it indicates the likelihood that the sports commission will have a consistent flow of participants, which is ultimately linked to the sustainability of small-scale event tourism for the community.

In terms of general exposure to the community outside of the events, most participants reported eating out and shopping as their most frequent activities. This finding is consistent with most other studies on small-scale sport tourism (Daniels & Norman, 2003; Veltri et al., 2009; Wilson, 2006). Unless organizers provide food as part of the event, all tourists need to eat, and so a supply of restaurants that cater to the tastes and price requirements of the event participants will also be part of the success of a small-scale sport tourism initiative and its overall sustainability. Shopping and participation in other activities are likely to be related to the structure of the event. Events with tighter schedules and little free time for event participants tend not to facilitate participation in other available activities (Daniels & Norman, 2003). Moreover, understanding the motivation and interest in other activities as an event sport tourist is also important in spreading the benefits generated from an event and facilitating contact between tourists and the locals.

A consistent finding among sport tourism researchers is that sport tourists are interested in little else other than the sport and it is hard to entice sport tourists to take part in other community activities, including shopping when they are in town for an event (e.g., Gibson, Willming, & Holdnak, 2003). Ways to encourage participation in other activities may be to organize compatible activities with the event and to build downtime into an event so that there is time for sightseeing or shopping (Daniels & Norman, 2003). The GSC uses various strategies to organize compatible activities. For example, at the soccer event the Gainesville Soccer Alliance (GSA) a partner of the GSC includes an exhibition soccer game by the local university team for the event participants. Over half of the event participants surveyed reported that they attended this event. Such events not only add to the satisfaction of the event participants but also are frequently enjoyed by the locals and may contribute to the quality of their lives by providing entertainment and a general sense of pride from sharing their community with visitors (Ziakas, 2010). While pride and quality of life were not directly measured in this study which is a limitation, similar studies do report an enhanced sense of pride and quality of life as a result of hosting small-scale sport tourism events (Horne, 2000; Veltri et al., 2009; Walo et al., 1996; Ziakas, 2010), and thus, contribute to the social sustainability of tourism in a community (Liu, 2003).

This study examined the participation of volunteers in the execution of the events as a social indicator of sustainability. In the case of the GSC, many of the volunteers were students at the local university who were seeking hands-on experience in

event management and execution. Thus, their participation had the added benefit of contributing to the students' education and helping to bridge the divide between the university and the local residents. Horne (2000) and Ziakas (2010) noted, having a regular portfolio of events results in building a skilled group of volunteers within a community able to help with future events. For the GSC, many of the students volunteer repeatedly over the course of their college career and are a valuable resource in facilitating the sustainability of the GSC's event portfolio.

The environmental pillar of sustainable tourism relates to ecological change brought about by tourist activity and development of infrastructure. It can incorporate such dimensions as carrying capacity, overcrowding, recycling, resource use, and infrastructure development. One of the biggest ecological changes associated with mega sporting events is the development of new infrastructure and the influx of people during the events (Chernushenko, 1996). Small-scale sport tourism usually works with existing facilities, as there is likely to be little funding to build new ones, and also within the carrying capacity for the community in terms of hotel space, sports facility capacity, and transportation limits. All of the events in this study used existing facilities ranging from municipal parks and recreation facilities, private sporting facilities, and those of the university. The GSC did mention that its recycling policy for each of its events was tied to the practices implemented at each individual facility and as such might be something they consider standardizing in the future. However, in terms of facility use, all of the events were tied to existing facilities. The bid process for an event also reinforces this relationship as each bid document included information about the quality of the facilities (competition standards for each sport), carrying capacity for each facility, and hotel rooms available. This process ensures that the events hosted are appropriate in size and capacity for the community (Higham, 1999). Moreover, as Chalip (2004) suggested, if events hosted by a community are compatible with the overall image of a community they tend to be more successful and ultimately self sustaining.

The GSC is also involved in environmental advocacy and policy for the local community. As Beioley (1995) noted as one of his four characteristics of sustainable tourism, businesses need not only guard against overuse of the local environment but also show respect for it. Advocating for parks and protection of fragile natural environments exhibits this respect and while provision of parks and recreation facilities can ultimately help the GSC by providing additional venues, land that is dedicated for park use or protected for its ecological value is also associated with environmental stewardship (Carr, 2002). Thus, while the GSC may be unique in this aspect of the environmental pillar of sustainable tourism, it provides a model for other sports commissions and tourism providers. As Beioley pointed out, the tourism industry as a whole should not be focused solely on their destination but be aware of the environment as a whole if tourism is to be sustainable. The GSC's advocacy for park land and the protection of ecologically sensitive places demonstrates such awareness.

The findings of this study also provide support for Wilson's (2006) contention that a Type E event should be added to Gratton et al.'s (2000) event typology. It may be that Type E events, (that is those minor events, often with more competitors than spectators, little national media coverage and limited economic activity), are the model for sustainable tourism development through sport tourism.

6. Conclusion

In advocating for small-scale event sport tourism as an alternative to the negatives associated with hosting large-scale events, Higham (1999) suggested that such events promote a consistent flow of visitors, use existing facilities, and are of a size that is compatible with the host community. The events studied in this paper and the work of the GSC as a whole match these requirements. Taking a lead from discussions in the wider tourism literature about sustainability (Liu, 2003), and the sport tourism literature in particular (Fredline, 2005; Fyall & Jago, 2009; O'Brien & Chalip, 2008), we suggest that small-scale sport tourism can be a form of sustainable tourism for a community. A small-scale sport tourism portfolio is compatible with and contributes to the economic, social, and environmental pillars of sustainable tourism. Such a sustainable tourism strategy may not be appropriate for all communities. However, for a community such as Gainesville with a passion for sports, an inventory of sports facilities, hotel capacity, volunteer pool, and an innovative sports commission, small-scale sport tourism appears to be an appropriate form of sustainable tourism for the community.

This is one of the first attempts at combining both a conceptual and empirical sustainability analysis in a small-scale event sport tourism context. Moreover, our approach meets Ziakas' (2010) call for more empirical research that focuses on the "the value of an event portfolio as a tool in development strategies" (p. 147). The data used in this study were not collected with the intent of comparing across events, and so, one of the limitations of this research is the incompatibility or lack of data for certain events. We feel that this did not hinder the overall purpose of this paper. However, we would recommend in future studies that a standardized instrument is used to facilitate comparison across events. By comparing the results from this study to those of Daniels and Norman (2003) it is interesting to see the similarities in event related behaviors, motivations, and expenditure patterns. Thus, while we would caution against the wide-scale generalizations of our findings, the similarities between the two studies suggest that the findings may be generalized to other communities with comparable small-scale events. The data are also descriptive and should be viewed as providing support for the wider conceptual proposition that small-scale events can be considered a viable form of sustainable tourism. For future research we suggest that studies of this type should incorporate more indicators of social and environmental impacts of small-scale events. Regarding the environmental aspects of small-scale event sport tourism, we know very little. Thus, future investigations with an environmental focus are certainly warranted. We also suggest that scholars focus on the interrelationships of events in a community's event portfolio (Ziakas, 2010) and strategies to cross leverage economic, social,

and environmental benefits (O'Brien & Chalip, 2008). Our study is a first step in proposing that small-scale event sport tourism might be viewed as a viable form of sustainable tourism development for many communities.

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APPENDIX VIII



**PARKS AND
RECREATION
DEPARTMENTS
ACROSS THE
COUNTRY ARE
INVESTING
IN SPORTS
TOURISM.**

**BY EMILY
MAYNARD**

In 2005, parks and recreation operations manager Joel Dunn approached the Carson City, Nev., convention and visitors bureau with a proposal to boost sports tourism in the city. "When we originally started the campaign, the intent was to bring in some additional tournaments so that we would reap the benefits of our concessions sales," Dunn says. "We knew that if we could bring in a few more thousand dollars from concessions each year, we could offset some of the operational costs of our programs for our residents."

It paid off. The bureau's grant of \$15,000, which covered costs such as event staffing and facility operations, allowed

Dunn to bring in 12,000 visitors from outside of a 100-mile radius and more than \$3.6 million in local spending. For the 2012-13 tournament season, the bureau has invested nearly \$71,000, and Dunn estimates that the campaign is on track to bring in \$18.5 million to Carson City's economy.

Dunn has spent the past seven years attracting and growing tournaments in Carson City, as well as building support among businesses and residents. The local hotel industry was on board relatively early. "About halfway through this campaign we had one of our major lodging properties say that if it were not for sports tourism, they would have had an eight percent occupancy rate and more than



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likely would have had to shut their doors," Dunn says.

From amateur youth tournaments to NCAA tournaments, communities are vying to land a piece of the largely recession-proof action. According to a 2012 report from the National Association of Sports Commissions, visitors spent more than \$7.6 billion on sports travel in 2011, a 6.5 percent increase over the previous year. Most of that is spent locally on food, lodging and retail, providing a significant economic boost that's good for everyone in the community, including the parks and recreation department. Once seen as an intrusion into resources intended to serve the local community, sports tournaments are now embraced by many parks and recreation departments.

"What we're seeing is a gradual confluence of mutual interest," says NASC executive director Don Schumacher. "Ten years ago, parks and recreation departments were

of parks and recreation Michael Golden of the sports tourism efforts in Chesterfield County, Va. "Our last fiscal year, we had a 46 percent increase in sports tourism over the fiscal year before, up to \$20 million. Our budget went up by between \$67,000 and \$70,000 to handle the increased volume."

Though the outcome speaks for itself, convincing residents that giving up use of a field or facility for a day or a weekend here or there will actually benefit not only them but the entire local economy requires a bit of work. "I've got youth and adult participants paying for our recreation programs, and they don't want to lose a Friday night coed softball game for the sake of a tournament," says Dunn.

"It's really a culture change," Golden says. "The local sports organizations think, 'I've got my fields, that's all I care about.' But if they want to participate in some of these events, if they want nicer

What typically will happen is, **once you reach that higher plateau of quality, you don't drop back.** And then, quite frankly, it becomes a matter of pride.

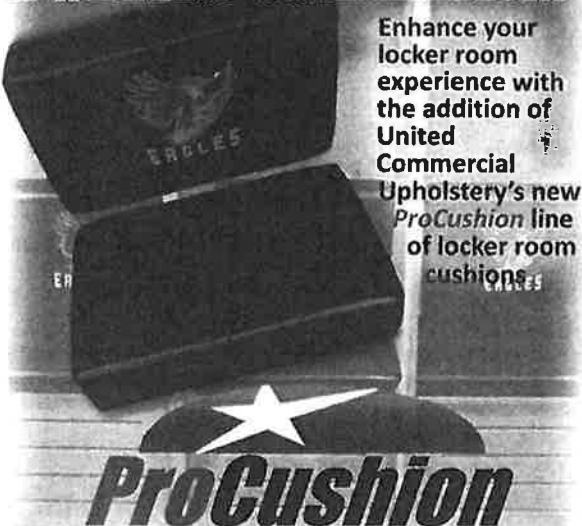
very defensive when someone from a sports commission or convention and visitors bureau approached them about a tournament. But as departments have been under budgetary pressures, they have realized that if they can demonstrate that their facilities are valuable as a resource to attract visitors and spending, then they can be seen as part of the economic development engine in the community, instead of an expense line in the budget."

"The figure we use is \$208 per day per visitor — that is what gets spent in the local community," says director

facilities, we've got to pay the bills somehow."

The shift requires focusing not on what a recreation department or its users must give up, but what they stand to gain. The city of Columbus, Ind., got into the tournament hosting business in 2004 with the United States Specialty Sports Association Girls' Fastpitch World Series and a few smaller events. "It was ideal for parks and recreation," says director of sports tourism Jim Dietz. "For the most part, a lot of their facilities were sitting vacant on weekends. They had a lot of leagues during the week, but

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nothing on weekends. It was perfect to take an existing facility, without spending additional money, and bring in a tournament."

A little extra money can make a big difference for a parks and recreation department, though not necessarily in ways that are noticed by users — Dunn says that although his department's budget has been cut 13 percent over the past five years, it has been able to maintain its staff and programming thanks to the added revenue. More noticeable to users are the improvements in facilities that come along with sports tourism. "Whenever you hold a tournament, especially a rather significant regional or national tournament, you upgrade the quality of your field and your facilities," says Dietz. "You might fertilize the grass a little bit more or irrigate more. What typically will happen is, once you reach that higher plateau of quality, you don't drop back. And then, quite frankly, it becomes a matter of pride for your parks and recreation department."

This year, the city of Columbus has 80 scheduled sports events. To keep up with demand, the city has upgraded its facilities and added a new irrigation system to bear the added use. "We have some 35 soccer fields, depending on the configuration," Dietz says. "It was a combination of the revenue from the tournaments and some money that was given through the city to enhance it. It was given because of the potential money we could get from hosting soccer tournaments, but we also use that facility for rugby and will use it down the road for field hockey and lacrosse."

Sprucing up existing facilities is just the beginning.

It was perfect to take an existing facility, without spending additional money, and bring in a tournament.

says Schumacher. "One of the really big benefits is that everyone is able to show the value of these facilities, and then the question comes up, 'Do we need more sports facilities?' And then, 'If we somehow make them available, how many more tournaments could we host that would bring more visitors to town?' Cities can't possibly host tournaments all the time, which means fields are available to the public a lot of the time."

The added space means local organizations that utilize parks and recreation facilities don't have to compete with each other and can expand their programs, which in turn leads to more revenue for the recreation department to support and expand its own programs. Participation is further fueled by sports events themselves. Even when

they can't use the facilities, events provide an inexpensive form of entertainment for local residents, as well as expose youths to different sports and possibly motivate them to be more active.

Getting communities on board to use existing resources is one thing, but investing in a larger, regional sports park, which is becoming almost essential for sports tourism campaigns to remain competitive, is a harder sell. "The past couple years have been focused on community awareness and trying to find additional revenue to invest in a regional park for the city," says Dunn. "The one thing we're lacking in Carson City is that reinvestment in our own sports fields. In order to continue to expand, we're going to have to look at building a regional park."

In August, residents in Frankenmuth, Mich., headed to the polls to vote on whether a tax increase would fund the construction of a new recreation center. The design was not very different from other recreation centers: an indoor facility with a track, multiuse courts and meeting rooms, and 13 outdoor athletic fields, a playground, a splash park and concessions areas. Unlike other facilities, however, the Frankenmuth Recreation Center would be completely free for residents, relying solely on revenue from sports tournaments to fund its upkeep.

"This is an amenity that will keep kids in the gyms and on the fields instead of getting into trouble elsewhere," Chris Rittmueller, president of the Frankenmuth Youth Sports Association, told *The Saginaw News*. "It is a positive in terms of bringing people into Frankenmuth, hopefully bringing young families into Frankenmuth and giving our residents a place to stay active, free of charge for city residents."

The sports association spent six years developing a plan for the center, which included a cost analysis to determine the number of tournaments required to break even. But as good as the concept was in theory, investing in a self-sustaining recreation center required a greater leap of faith than the residents of Frankenmuth were willing to take, and voters turned down the proposal. Said Rittmueller in a statement, "I've had people I consider friends ask me questions about it, listen to me explain the way in which it will operate, and basically say, 'Well, that's what you say.'"


Convincing a community to pay higher taxes to fund a facility to be used by outside groups has a low success rate, but residents are more accepting of an increase on services primarily used by visitors, like restaurant or hotel taxes. In July, the City of Elizabethtown, Ky., opened one of the largest sports parks in the country, featuring 24 lighted fields. The \$29 million project was financed by a two percent increase in restaurant sales tax. "Yes, the residents are paying for it every time they eat out, but it's a tourist area," says Schumacher. "The largest percentage is actually being borne by people coming to Elizabethtown for sports purposes or going to Fort Knox for military purposes, whatever it is."

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Recreation ■ Tourist Towns

Officials in Virginia's Chesterfield County have taken a slightly different approach to providing tournament facilities. While they have invested in their own resources, the county has also encouraged local nonprofit groups to build facilities. The county helped fund construction of 12 synthetic turf fields at the privately owned River City Sportsplex. In exchange, it holds a long-term lease that allows the parks and recreation department to use the fields during the week, increasing what it can do with its own programming. By pooling county and nonprofit resources, the two groups are able to host larger tournaments than either could individually. Even when county facilities are not being used for tournaments, everyone still benefits, Golden says. "My view is that as long as it's happening in the county and folks are coming and staying in our hotels and our kids can come and watch, it doesn't matter if it's private

or public facilities; it's good for us."

Having a state-of-the-art facility at your disposal doesn't guarantee success, however. Community support is needed not only to build a facility, but also to supply the other necessary elements of a successful tournament. About 30 miles away from Carson City, the City of Sparks opened its Golden Eagle Regional Park in 2008, featuring 1.4 million square feet of synthetic turf, the largest single installation in North America. "We did have some competition," says Dunn, "but with the location of the fields — it's about 35 or 40 minutes north of Reno/Sparks, and they just haven't seen businesses grow in that area, so there's no lodging — if you're playing out there, you're a minimum half-hour drive from where you're going to stay."

"What's really looked upon is the facility, the number of fields available, and whether they fit with



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BY ALL MEANS

From tournaments to triathlons, myriad opportunities exist for communities to bring in outside visitors — and their spending.

the size of the tournament," says Ron Radigonda, executive director of the Amateur Softball Association/USA Softball of the association's bidding criteria. "We have 150 teams a year at some of our tournaments. In order to best accommodate that, you need 15 fields in close proximity that are all of suitable quality. Then, do they have the corresponding number of hotel rooms that can handle the number of visitors?"

The ASA awards bids for its 115 tournaments at its national convention every November and looks at a variety of factors that the bidding city or organization must have considered. The best bids cover all the bases, including marketing, facility use, hotel availability — areas over which no one city department or organization has complete expertise, nor the resources to take on.

"If you can get the convention and visitors bureau, the sports commission and the parks and recreation department together, it's going to be a successful event," says Radigonda. "The city is actually putting the bid in and going forward using the three prongs: the marketing aspect of the CVB; the relationship building of the sports commission; and the work of the park and recreation people to put the tournament on. That's a pretty empowering group that some cities have figured out and embraced."

There is one more element that is essential to the success of a sporting event — local sports organizations. For them, the benefits of sports tourism extend beyond improved facilities, providing more incentive for them to give up not only their facilities for a tournament, but their time, as well.

"Here's the normal scenario," explains Schumacher. "The parks and recreation department has leased fields to a club, and the club is responsible for all maintenance and must keep the facility in at least the condition it was in when the lease was signed. The club has to go out and figure out how to pay for all of

that maintenance. The beauty of the tournament is that a club can earn money, the department can rent the facility, the event takes place, the visitors come to town, and they leave money behind."

Clubs may work with a sports commission or the local CVB to bid for a tournament, but the development of local, grassroots tournaments is becoming more common. "They're essentially locally owned and controlled, and they grow every year," says Schumacher. Because they originate from within the community, they tend to sidestep objections over local versus tourist use of facilities. Moreover, there is no bidding process required for recurring events.

"It's a lot easier to keep an existing customer than recruit a new one," says Golden. "Our focus is on keeping and growing the events we have, helping our local groups and start small, rather than going out and bidding on a

tournament that might come one time and not again for 10 years."

Even if they're not involved in the initial bidding of a tournament, local leagues can still play an important role in organizing and hosting a tournament. "We depend not on the county but sports groups to bring volunteers to run these events," Golden says. "Our role is to provide nice facilities so that people will want to come back again. You put the tournament on; we'll help you with the facilities."

"It takes a small army to run a successful tournament," says Dunn, but it's worth it. "A lot of communities are missing the boat on this. If you have the resources, the fields, the rooms to bring these tournaments in, you really need to do it." ☐

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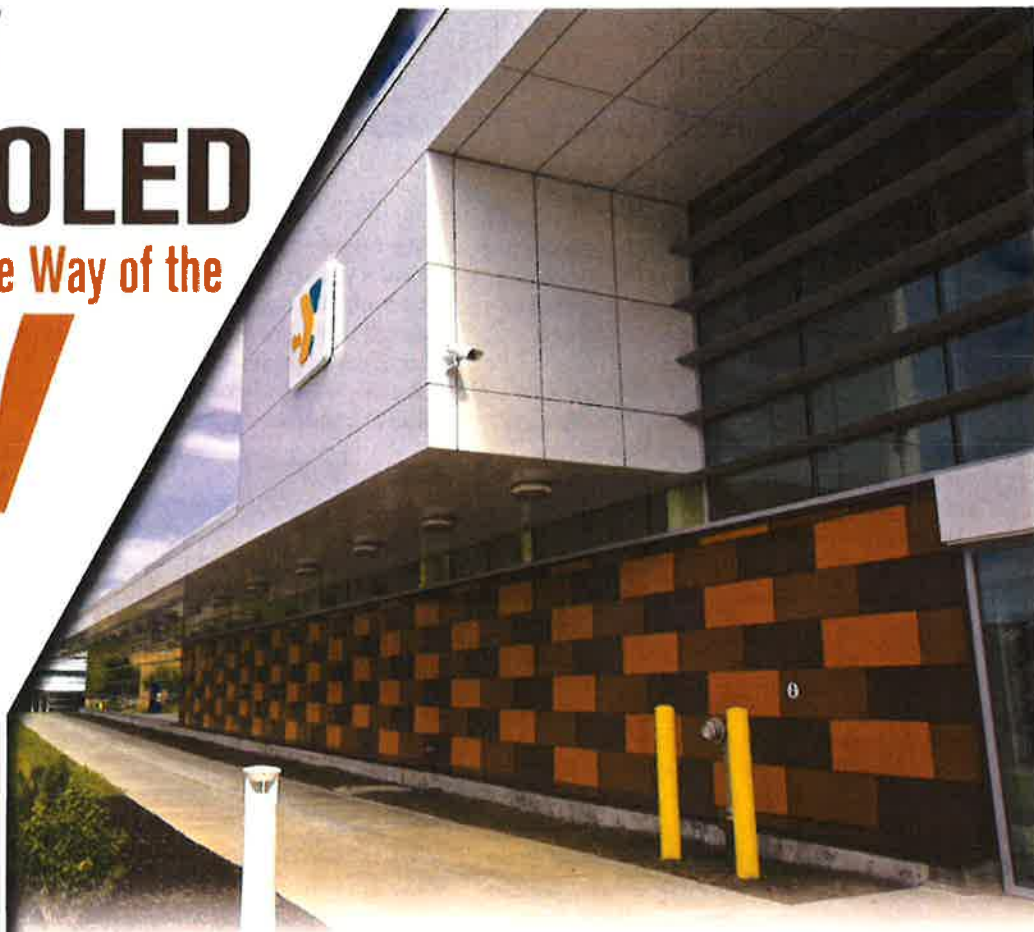
APPENDIX IX



SCHOOLED

in the Way of the

Y



Partnerships between colleges and YMCAs bring more fitness opportunities to smaller campuses. BY EMILY ATTWOOD

Multi-million dollar state-of-the-art student recreation and wellness facilities are de rigueur on major college campuses, as students expect more out of their educational experience than just a degree. That expectation is trickling down to even the commuter and community college levels, where offering such amenities hasn't been considered feasible. "The students have wanted to be able to build a student center and exercise facility that would provide a sense of community and a reason to be on campus outside of academics," says Harlan Patterson, vice chancellor of Administrative Services at the University of Washington Tacoma, which started out as a commuter college in the 1990s but has since grown into something more.

The university did have the space to build such a

facility, but lacked the experience to run it. That's where the YMCA of Pierce and Kitsap Counties came into play. "We have a huge compatibility of missions," Patterson says. "We're about building healthy communities through healthy mind and body. We're a little bit more on the mind and the Y's a little bit more on the body, but we both agree that it's good to have both components."

"It made sense to work together," agrees Ronn McMahon, senior vice president of financial development and strategic collaborations for the YMCA of Pierce and Kitsap Counties. "They have the ability to build a facility and we have the operational experience and skills to run it. This partnership was so compelling that although we didn't have plans to build another downtown location, because of the university's desires and needs long-term, this just made a lot of sense for us."

And thus the plan for **University Y**, as it will be known when it eventually opens, was set into motion.

UNIVERSALLY UNIQUE

Public-private partnerships are becoming more common, and although partnerships between colleges and YMCAs are rare, they're not unheard of. The idea that sparked the partnership in Washington was one that UW Tacoma's chancellor had brought with



RENDERING COURTESY OF UW TACOMA

University Y

Location: Tacoma, Wash.

Opening: Late 2014/2015

Owned by: University of Tacoma Washington

Managed by: YMCA of Pierce and Kitsap Counties

can think about is doing it again is not unique to CrossFit. It's unique to activities that people enjoy. Just ask the middle-aged mom who just took BodyPump class for the first time and didn't think she would finish.

As for fitness professionals, we'd ask you to relax, too. CrossFit is exercise. Sure, people are going to get hurt, but people get hurt lifting, running, doing ballet and playing summer softball. The weekend CrossFit Level 1 certification is likely inadequate, but the same can be said of weekend certifications for yoga, Pilates and even Olympic lifting. Many of the movements are contraindicated, especially for beginners, but have you ever seen a beginning yoga participant, or even someone trying to squat for the first time in a group fitness class? Everyone has to start somewhere.


If you feel threatened and/or annoyed by CrossFit, take away the best of what it offers. If you are a personal trainer and afraid you might lose clients to the local box, ask yourself what you are doing to get your clients as excited as those CrossFitters who are luring your clients away. If you are a gym owner, ask yourself what you are

doing to build community among your members.

And if you are an exercise physiology purest who is dissuading people from CrossFit, ask yourself if you are just as annoyed by other less-than-ideal forms of working out, or is CrossFit just especially bothersome because you didn't think of it first. @

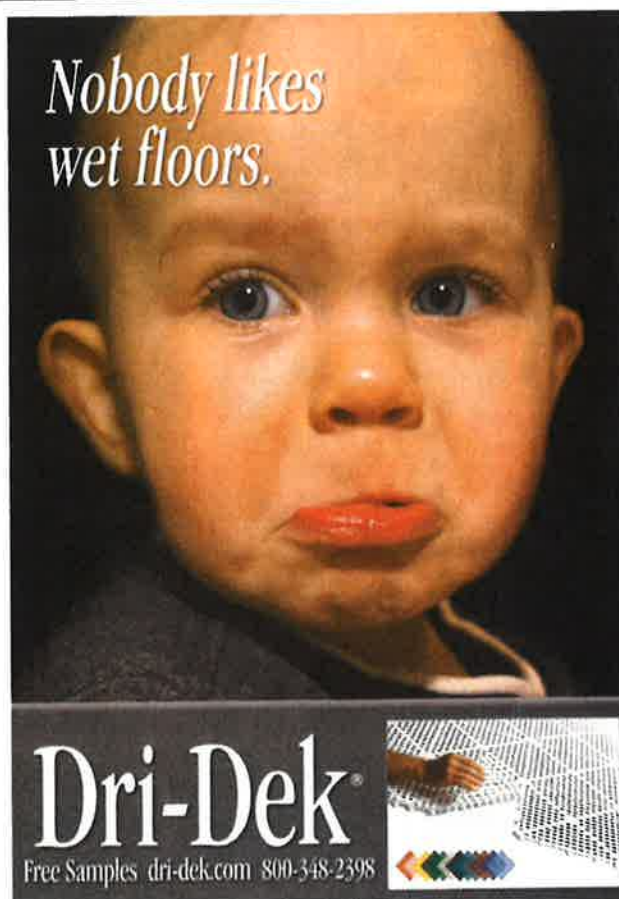
"Stringing together a bunch of existing movements is **not rocket science**. On the other hand, there is something unique there."

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WHO BENEFITS?

THE COLLEGE

Instant expertise. Aside from the work required for the university to go out and hire a staff of its own, UW Tacoma's Harlan Patterson says the level of experience the Y brings to the table made the university comfortable with its abilities. "Whether it's Zumba or the latest high-end training piece, that will change between now and when we open up. That's one of the things the Y does; they are constantly surveying the people in their spaces to see what programs are working or what new ideas people would like to see brought in."

Reduced operational cost. On its own, a college might not be able to afford to keep its recreation facility open and staffed the same hours as the YMCA can support; with the Y's help, it doesn't have to afford it at all. "It's a great opportunity to be able to build these facilities but takes off the onus of having to support them after they've been built," says Y representative Ronn McMahon.

THE YMCA

No building burden. "All of our facilities are getting close to capacity, and we're always looking at ways we can expand or add facilities," says McMahon. UW Tacoma will take on the \$20 million cost to build the new facility, as well as be responsible for the maintenance of the exterior and surrounding land.

Increased membership base. "We're very excited to have more members, obviously," says McMahon. The partnership with the university will give students not just access to the University Y, but all YMCA locations within a 30-mile radius, a strategy that could have a long-term payoff, McMahon hopes. "Even when you're not a student any more, hopefully you had such a great experience that you'll be a member for life."

A new workforce. "The Y will get to know our students and be able to tap into a workforce that can help it with its programming," says Patterson. "Ys tend to hire young professionals to help with outreach and staff their facilities."

THE STUDENTS

Better access. Without a community partnership to boost the user base, smaller campuses wouldn't have the demand needed to justify a facility in the first place. For campuses that have the base to support a program, the added demand translates into added hours. Says Onondaga Community College athletic director Rob Edson, "When we ran our own operations, it was limited hours, not open on the weekends, not open during the summer." UW Tacoma, largely a commuter campus, goes even further to provide access for its students. "They'll also get membership to all the other Ys in the Sound area," says Patterson. "Most of our students commute from within about a 30-mile radius, and there are other Y facilities sprinkled throughout that area."

Better programs. "We survey our members every month so that we're always in tune with what they're wanting," says McMahon. "With the student branch, the programs will be different but we will run it with the same idea of listening to the members and basing the program on their needs."

Networking. "The students like it because they can work out next to the mayor," says Y rep George Scobas. The melding of user bases offers students exposure to real-world experience and serves as a potential stepping-stone to a post-college career.

YMCA MEMBERS

Networking. It's not just the students that stand to benefit from the relationships that form at the fitness center. "Our folks get to meet some of the students and help them with internships and things like that," says Scobas.

More program options. The larger user base, especially the addition of younger, more active members, can translate into opportunities to participate in programs that simply weren't an option due to lack of interest, such as basketball leagues or pickup soccer games. "We've run intramurals at our other facility for the university," says McMahon. "It's been primarily the students, but we haven't said it's exclusive to students. Sometimes others join in, and that adds to the experience for everybody."

Schooled in the Way of the Y

her from her previous experience working with Arizona State University's downtown campus and partnering with the local Y. "The partnership started in 2006, when ASU built a campus downtown," says George Scobas, CEO of the Valley of the Sun YMCA in Phoenix, which owns and operates YMCAs on a handful of college campuses in the area. "At that point, enrollment was about 2,000 or 3,000 students, and they asked if the Y would be their recreation center."

The Lincoln Family Downtown YMCA welcomed the students, but as enrollment expanded to nearly 20,000, the need for ASU's own facility became apparent. The university-owned and -operated **Y@ASU** officially opens next month, and with it comes a physical as well as operational link to the YMCA. "They're connected," says Scobas. "We've taken our building here and attached an additional building with a breezeway between the two. YMCA members can go to ASU's rec center and students can go to the Y."

While some higher-demand functions, such as fitness equipment and spinning rooms can be found on both sides, others are unique. "We have handball courts and a free-weight area, they have the jogging track," Scobas explains.



The Y@ASU

Location: Phoenix, Ariz.

Opening: October 2013

Owned by: Arizona State University
(Connected to Lincoln YMCA via breezeway)

Managed by: ASU (Programming complements YMCA's offerings)

"We have an indoor pool, they have a rooftop pool."

Across the country in New York, Onondaga Community College is going on its third year partnering with the YMCA of Greater Syracuse on operations of the **Southwest YMCA**. "It has been a work in progress," admits OCC athletic director Rob Edson. "Nobody's ever done this before; there wasn't a roadmap that we could follow. There wasn't anybody that we could call and say, 'Hey how did you handle this aspect?' even from the Y's perspective."

The relationship looks a bit different everywhere. The University Y in Tacoma will essentially be a fitness center with a special area set aside for student services and student government, built by the school and run by the Y. At OCC, the partnership built off of the college's existing facilities and incorporates not just fitness areas, but a gym, an arena, a track, classroom spaces and an outdoor recreational field. The breakdown of responsibilities

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Campbell County Recreation Center, Gillette, WY

Minot State Student Recreation, Minot, N. Dakota

Wellness Center, Dexter, Michigan

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Southwest YMCA at Onondaga Community College

Location: Syracuse, N.Y.

Opened: January 2012

Owned by: Onondaga Community College

Managed by: YMCA of Greater Syracuse (SRC Arena & Events Center operated by OCC)

remains nearly identical in both cases. As Edson explains, "The college has hired the YMCA to manage the operations for a series of health and wellness initiatives. We handle the operational aspects of the arena and the facility. The Y is operating the programs."

However a partnership unfolds, the devil is in the details, says McMahon. "One of the things about these collaborations is that at a very high level, they all make perfect sense — we say the university will benefit, the students will benefit, the Y will benefit — but when you work through partnerships, it's the details and the contracts and all the different entities making it all work."

A BALANCING ACT

For all the work they've done already, UW Tacoma and the YMCA understand that the process won't end when the doors open. "We have an advisory committee that will be

Schooled in the Way of the Y

students and Y representatives sitting down annually and reviewing what the program includes," says Patterson. "These programs evolve and change, so we don't really know what we're going to want to be there 10 years from now; some of them might not have been invented yet."

It's that focus on communication and willingness to change that Edson credits with the success of the partnership at Onondaga. "Every year, you can almost make the argument that half of your student population is new," he says. "We have to communicate to them what we're doing, why we're doing it and how we're doing it. This is a facility that hosts academic classes, athletic events, health and wellness activities and shows. Trying to be as efficient as we possibly can so that we're programming to all of those populations has required a lot more attention and communication than just publishing a schedule."

Balancing the two populations served has been more of a challenge than the two entities originally imagined. While students and YMCA members may be seeking the same benefits from a trip to the fitness facility, that doesn't necessarily mean they want to share the same space while they're there. "Frankly, sometimes students weren't comfortable with having a group of younger children in



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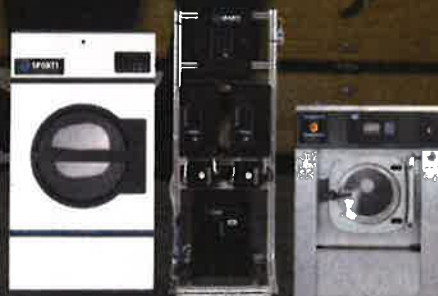
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Programming & Operations

there, and parents weren't really comfortable with a group of college students," says Edson.

In a move that may seem counterintuitive in light of its focus on students, the Southwest YMCA instituted a concept of family time, setting aside a window of time four days a week specifically for public use of the fitness center. By giving families a specific time to work out together, though, their presence during other times is lessened.

On the flip side, programming intended to serve just one group or the other, like student intramurals, are finding better success by teaming up. "We have some activities, like our badminton groups, that have merged," says Edson. "We're trying to find out if there are other areas where we can create synergies and whether it makes sense to create those synergies."

Though the partnership at Onondaga is entering its third year, Edson says it still feels like the startup phase. "It's been a successful partnership thus far, but there's still a lot of room to grow," he says. "Every semester brings new challenges and a new perspective. It's an opportunity for us to continually improve and stay on our toes."

Once the two entities have mastered — or at least become more confident — in their operational partnership, Edson anticipates the payoff will continue to increase, bringing more opportunities for both students and YMCA members — opportunities neither entity could have offered alone.

It's the same potential payoff driving the hard work going on at UW Tacoma. "The idea of public-private partnerships is happening across the country," says McMahon. "With the university, it might still be a little unique. Just be open to the possibilities and keep your eye on how it's going to benefit the students and the community, not the model you already know." ■

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APPENDIX X



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Graham Aquatic Center – York YMCA, PA



REPORT

Greater Mankato Regional Recreation Facilities Development Update

Prepared by

Greater Mankato Growth, Inc.

&

The Minnesota Amateur Sports Commission

December 21, 2017

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Summary of September/October 2017 Recreation Facility Meetings

In the months of September/October 2017, the Mankato Sports Commission hosted a series of meetings facilitated by the Minnesota Amateur Sports Commission (MASC) with recreation user groups and recreation facility owners. The purpose of these meetings was to gather information on the current state and future needs of sports organizations and facility operators in the region and determine where opportunities may be present for those entities to partner on facilities development.

Following are general observations from these meetings as well as more detailed summaries of each meeting with sports/user groups and recreations facilities owners. This document was crafted by the Mankato Sports Commission with input from the Minnesota Amateur Sports Commission (MASC).

General Highlights

- There is clearly a demonstrated need for additional space on the part of user groups.
- Facility owners were very positive about the opportunity to expand and to work with local user groups.
- The information presented shows that preliminary facility plans are on a clear path to excellent local facilities, however, there is not yet a clear path established to facilities of regional presence/scope. Additional work will need to be done to ensure future facilities are of a regional nature.
- A key "compromise" of regional facilities is that while local groups get largely what they want, in order to attract tournaments etc., time must be set aside on weekends for hosting tournaments/other events.
- Facilities often work best when they can be rented to "anchor tenants" who have guaranteed hours in exchange for "buying in" to the facility either with a capital contribution and/or a long-term user agreement.
- All facilities should find a way to sell the 9:00 AM – 3:00 PM non-prime time – schools, active older adults, home school kids, day cares, medical/therapeutic users etc.
- A significant concern raised in interviews with user groups is that of affordability. The hourly rental rates currently being paid by local user groups are very low compared to rates in the metro. New facilities would likely require rates to increase to offset operating costs. This could create affordability issues for families. Since sales tax dollars cannot be used to subsidize operations, this will require further study.
- Many user groups are lacking detailed information needed to plug into an effective proforma. The Mankato Sports Commission/MASC are willing to work to assist those use groups with their financial modeling.
- Any feasibility analysis must consider if new space simply causes groups to vacate other space or if it will create actual new space and added useable hours - Need to determine if new space will address growth or displace old space that is less functional.
- As facilities are developed the Sports Commission should be positioned to help fill them with events that bring in visitors and create economic impact for the community. This means not only promoting the facilities for use, but also organizing/hosting some events as well.

SECTION ONE

Summary of Sept/Oct Meetings

Document from the Mankato Sports Commission which provides overall general highlights from our September/October meetings then summarizes the discussion that took place at each meeting – both for user groups and facility owners

Community Sports/Recreation User Groups Meetings

Overview

In September, the Mankato Sports Commission hosted four meetings with sports user groups to discuss their needs and how they could contribute to new recreation facilities. These four meetings were organized by facility type (courts, turf, ice, aquatics) with their associated user groups invited to participate (see the attached list of which user groups were invited). The Minnesota Amateur Sports Commission facilitated these meetings. In advance of these meetings, each user group was asked to fill out a workbook that contained specific questions about the user group's facilities needs.

Ice

- MASC comment: Build at least 2 sheets of ice to make economies of scale work. Does not make sense to build just one stand alone sheet of ice.
- Rinks can be multi-purpose when ice not being used.
- Primary users of ASA are Hockey (both youth and adult), figure skating, Community Ed & Rec via learn to skate programming.
- Cost of ice locally ranges from \$149-\$177 per hour to rent. MASC indicated approximate cost of \$200 - \$220 per hour to rent in a new facility.
- Severe shortage of decent ice time all around. MAHA could commit to at minimum 600 hours of new ice time at a new facility. Currently practicing 150 hours annually outside the community.
- MAHA Would like to host more games & tournaments. Currently host 7 tournaments – would like to host 15-20.
- Verizon Center has 343 additional hours available – though MAHA contends those hours are unstable as ice can be taken away at any time.
- Curling club has own facility with approximately 20 years of lease remaining and recent renovations completed.

Courts

- Comments from MASC on courts:
 - New facility needs to charge \$50-\$60 per hour to rent
 - There are ways to lower costs through technology
- Basketball currently paying \$10 per hour for weekday courts use. \$50 per hour for weekend courts use.
- Volleyball currently paying \$35 per hour
- Wrestling paying \$20 per hour for space on weeknights and anywhere from \$30-40 per hour for weekend tournament use
- Pickleball interested in indoor space. Have 6 outdoor courts and ability to play indoors at YMCA and PWMS.
- All groups including volleyball, basketball, LEEP, pickleball, wrestling, etc. need more court space for practice, games and tournaments.

Turf

- Comments from MASC on bubble:
 - \$50,000 - \$100,000 to put up and take down bubble depending on facility size. Life of bubble reduced every time it's set up and taken down.
 - About \$15,000-\$25,000 per month electric depending on size of facility.
 - User groups charged \$350 - \$400 per hour rent in metro.
 - Dome alternative: Sprung Structure – Double the construction price – but ¼ the operating costs and 20 year life span.
 - Maple Grove dome sold out before it opened and had 20 years of guaranteed sold time with anchor commitments (similar to anchor stores in a mall) and joint powers agreements.

Aquatics

- Duane Proell (aquatics consultant on the phone) – 8 lane, 50 meter pool necessary as well as access to a second pool on site to generate regional/state tournament use. Pools need to be diverse with multiple depths and temperatures to accommodate “cradle to grave” participants and their various activities.
- Duane encouraged consideration of converting existing non-functional/adequate pools into different facility use and building a new joint aquatics center somewhere else.
- Modern technology is reducing operating costs making them self-sustaining and less publicly subsidized.
- Duane Proell was invited to provide a subsequent presentation to all aquatics related stakeholders on November 28th. He discussed how he has worked with other communities to put together aquatics facilities plan that are sustainable. Pointed to several examples in MN (New Prague, Virginia) that he worked on and a 50 meter 2-pool facility in Tupelo, MS (similar in population size to Mankato) that has been successful. Said every project constructed now utilizes joint partnerships to construct.
- Duane estimated that a facility similar to what was constructed in Tupelo (50 Meter, 2 pools) would cost approximately \$15 million.
- Cost to hire consultant to take community through planning process for aquatics and produce a feasibility model and facility plan would cost between \$10-\$30 thousand. Studies and planning would take 5-6 months with construction taking 18-24 months.
- MANTAS:
 - currently charging participants approximately \$100 per month.
 - Paying \$50-\$55 per hour for pool time
 - 60-80 participants
 - Desire to host several swim meets in winter
 - Shortage of competition pools, especially for spectators.

Current Recreation Facility Owner Meetings

Overview

In October, a team composed of leadership from GMG, Visit Mankato, the Cities of Mankato/North Mankato, Mankato Sports Commission and the MN Amateur Sports Commission held separate meetings with current operators of recreation facilities to determine their needs, plans, and opportunities for partnership on new facilities. Those facility owners/operators included Minnesota State University, Mankato; Mankato Area Public Schools/Community Education & Recreation; Bethany Lutheran College; YMCA; and South Central College. In addition, Patrick Baker on GMG Staff and David Wittenberg, Mankato Sports Commission Chair, met with North Mankato Council Member Bob Freyberg, chair of All Seasons Arena. Summaries of those meetings follow.

Minnesota State University Mankato

- MSUM commissioned an Athletic Master Plan that was published in 2014.
- Among the several recommendations made in the plan, it calls for a new outdoor football stadium; new outdoor turf soccer field, and an indoor turf bubble. Concept image below:



- While fundraising is underway, there has been little movement on the master plan to date. And there is no specific timeline for construction on any facility moving forward as of yet.
- The key issue is what to do with Blakeslee Stadium. In addition, there is further investigation being done on how to make Blakeslee more usable/multi-purpose (i.e. for soccer / lacrosse).
- The University sees a strong need for indoor turf space. Envisions a facility that could be a field and a half that would accommodate both their students and the community during prime-time hours.
- Recreation is an important part of the University's recruiting strategy. Especially recruiting metro students, they have an expectation for high-quality rec facilities.
- There are some considerations that need to be navigated as it relates to University facilities 1) Bonds issued by the University would be tax exempt which places certain restrictions on private use; 2) New facilities need to be approved by the Minnesota State System Board.

Mankato Area Public Schools & Community Education & Recreation

- District has convened a long-term facilities task force to evaluate future academic and recreation needs. District willing to be a partner and responsive to community needs on future recreation facility discussions and plans.
- Renovations were just made to East locker rooms with addition of community locker rooms which increases access to pool & gym.
- District also responded to community need by adding 3rd court to Prairie Winds and the gym is designed to expand. The District also partnered with MAYBA for the fields at Rosa Parks, North Mankato and Mankato United for the Caswell Soccer fields.
- Community Education & Recreation manages scheduling for all district-owned facilities and operates community recreation programming.
- The district has identified the following recreation challenges:
 - Current aquatics facilities at West are not ideal for practices and are inadequate for competitions; competitions are held at MSU-Mankato.
 - Current East/West football fields are grass – and limited in their ability to be used for academic/curricular activities. Synthetic turf would increase playability and usage for other sports and curriculum. Would also make district more in line with other schools in Big 9 conference and other schools of similar size in southern Minnesota that have already converted to synthetic turf.
 - West would like an improved home baseball field – difficult, but possible, given current space constraints of West campus.
 - La Crosse is a growing sport with need for space.

Bethany Lutheran College

- Bethany's current facilities are heavily utilized and inadequate to serve their needs.
- Is currently evaluating the feasibility of an on-campus seasonal sports bubble. Plan is not yet finalized and has not yet been approved by Board of Trustees.
- Bethany is very interested in partnering with community on access to this potential facility.

YMCA

- The YMCA is currently evaluating the feasibility of an east side facility. Conducted community survey and has partnered with national consulting organization used by many YMCA's that have expanded.
- Has 10,000 members currently – estimates they would get 3,500 – 4,500 new members if east side facility were constructed.
- Preliminary plans call for a large gym and 25 yard 8-lane pool in a 55,000 sq ft facility that would open in late 2020. Final plans or location not yet established.
- Willing to partner with other community entities to enhance scope of project.

All Seasons Arena

- All Seasons Arena is a Joint Powers Board comprised of four political subdivisions (Mankato, North Mankato, Blue Earth County, Skyline).
- The ASA Board hires the manager and the manager hires the staff. The Manager is accountable to the Board.
- The operations of the ice is a contractual agreement with the Mankato Area Public Schools.
- The current Manager of the ASA is Jared Larson, who is responsible for cash flow, accounting, projections, budget preparation, facilities management, customer service, and putting together and conducting board meetings.
- Annual ASA operating budget is 750k – with a \$40k annual subsidy that is provided by the joint powers partners – amount has been stable for 3 decades.
- Total billed hours for last fiscal year was 3,933 hours for 2 sheets of ice.
- Remaining debt is about 500k – scheduled to be paid off in 2023.
- The North Rink needs a new floor and ice system between 2021-2023 at a cost of about \$1.8 million.
- The property was recently appraised at 7.6 million.
- Willing to engage in conversations with MN Amateur Sports Commission and community partners to evaluate ice expansion options and associated financials.

SCC

- Has current grass fields that are heavily utilized for community use. Are maintained by N. Mankato.
- SCC is currently implementing intramural sports – with the biggest demand among their student being Soccer.
- Long term goal is to join NJCAA (National Junior College Athletic Association) in select sports.
- No current plans for indoor recreation facilities.

Attachments:

- Letter from the Minnesota Amateur Sports Commission providing their analysis, key considerations and proposed next steps moving forward.
- Initial letter from the Minnesota Amateur Sports Commission with their brief summary evaluation following the September/October meetings. This was expanded on in much further detail in the previous attached document.
- List of user groups invited to participate in September pod discussions.

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SECTION TWO

MASC Analysis Report

Report from Steve Olson, COO of the Minnesota Amateur Sports Commission, providing MASC's analysis, key considerations/challenges and proposed next steps moving forward.



To the Mankato Sports Commission,

In our memo dated November 3, 2017 we identified three primary areas associated with the expansion of sports facilities in the Greater Mankato area. Those areas were creating regionally significant sports destinations, maintaining affordability for local users and using the increase in capacity to increase participation.

To reiterate some of the issues associated with these three concepts please keep the following in mind:

- Regional sports facilities require active programming and dedicated weekend time in order to serve a regional constituency. This does not always play well with local user groups because it requires heavy weekend programming which disrupts consistency in practice and game schedules.
- A local association can afford to pay their part of an operating budget, but are not capable of paying debt service in addition to operating costs. A regionally significant facility, even if there is no debt service, will bring higher operating costs due to its size, translating into higher rental costs for local users.
- Simply moving an activity from an older building with low rental rates to a newer facility with higher rental rates will not increase the user base.
- Local organizations must commit to long term use agreements prior to building new facilities. This ensures an operating revenue for the facility owner AND a place to play for the user group.
- Can creative programming, such as the weekday time from 9:00 a.m. to 3:00 p.m., be done to help offset the operating costs borne by the local sports organizations?
- Are there public-private partnerships to be had to offset construction and/or operating costs?
- For the MASC to assist with state legislative action, the facility needs to be of regional significance. What are the expectations of local policy makers in this regard?

Field House/Bubble- We met with Bethany directly and spoke to MSU about this possibility. Both are interested in developing a sports bubble. In addition, the local sports groups which would use such a facility demonstrated strong interest/support. Depending on the activity, a large indoor space in the Minnesota climate is a regionally significant facility. It is probably a fact that the regional draw is not as large as the regional draw for a 50 meter pool. Having a place to play indoor softball, soccer, lacrosse or long toss baseball would draw people to the area. Including a walking area will draw the locals. The issue with domes is not who will come, it's how to pay the operating costs through user fees. If you study the recent dome projects around the state all have some sort of tax based operating subsidy ranging from close to break-even to over \$300K per year. A bubble will require local user groups to contractually commit to renting a guaranteed number of hours per year for the life span of the building to ensure adequate operating revenue. If the bubble is to go up and come down annually, the cost of the put-up/take-down must be factored into the operating costs. This will range from \$50K to over \$100K per year based on the size of the bubble. For this fact and the associated monthly operating costs, we do not recommend a bubble larger than about 100,000 square feet. The other options for a facility like this are a rigid frame fabric building (Sprung.com) or a hard-side building. These are double and then quadruple the cost of a dome, but in the case of the rigid frame fabric building can be cheaper to own/operate of a 20 year life span.

Community Center Elements- Court sports and a pool are basic elements of a community center. They could be combined into one building, built as stand-alone structures, or built as additions to existing facilities. Combining the common elements of sports spaces spreads the initial cost and lifetime operating costs over a larger user group. Finding means to build together or add on to an existing building would be advised. Ice is also a component seen attached to some aquatics facilities as there are natural operating efficiencies there (Rochester is one example).

Aquatics- There is a delicate balance here between the affordability and capacity needs of local users and the fact that only a 50 meter pool serves the regional need. In a regional capacity, the pool would need to run events on approximately 50% of all weekends. It is probably the case the MSU would have to be heavily involved in the pro forma of a 50 meter pool. Pardon the pun, but this area would need a much

deeper dive into construction costs, operating costs and programming prior to moving forward. However, with interest in aquatics facilities demonstrated by the School District, YMCA, and MSU, the community has a solid foundation of potential users/operators to merit further study of a regional aquatics facility. In addition, to be a viable community asset a pool needs play elements and a warm water training pool suitable for the very young and the elderly. Outside of a 50 meter pool, the description offered by the YMCA of a new facility in the area would work well for local swimmers. Operating costs are still high, but with new technology and materials nowhere near as high as 20 years ago.

Courts-A need exists for an increase in capacity for basketball and volleyball space. Pickleball and tennis can also use hardcourt floor space. It is still unclear as to how much increase in space is needed to accommodate local use. Creating a facility of regional significance would require 4 to 6 courts in one place. Since the school district is the primary operator of this type of space, it would make sense to add on to a school if not part of a community center concept.

Ice-There is strong interest from the local hockey association for additional capacity for practice and tournaments and growth in their overall participation. At the same time, there is discussion regarding looking at better long-term facilities options in light of a potential multi-million dollar repair to the existing facility. Further study to evaluate the feasibility of a new regional ice facility has merit. However, the community needs to keep in mind the following considerations during that process. Options to replace R-22 have significantly increased in number and viability. This may reduce the cost of conversion from over \$1M to under \$100K. This will need to be factored into any decision to build new. In addition, the City of Mankato/Verizon Center has indicated a current surplus of hours at that facility. This will need to be studied and resolved by community stakeholders. Building a new two-sheet facility, which may, or may not, incorporate curling on a third sheet, would create a regional amenity when paired with the Verizon Center and ASA. However, it will also require a design to increase the base of hockey players and figure skaters. Programming fringe time, not just prime time, will be important to a sustainable revenue stream for operating costs. If new is built, the option to repurpose all or part of the current ASA facility to indoor soccer or court sports is an option.

Large Format Fields-Fields capable of facilitating soccer, football, lacrosse, ultimate disc or rugby continue to be in demand. With the steady growth in youth soccer and the very rapid growth of lacrosse and rugby the demand for large format space will not diminish. Adding seasonal capacity with artificial turf and daily capacity with lights would help with these sports. Using artificial fields for practices reduces the load on grass fields keeping them in top shape for tournaments. Combining softball/baseball functionality with four large format fields would create a regional destination that would be usable from March to late October. Review the installation at Minnetonka High School.

Baseball/Softball-Taking the opportunity to do what you already do well, better, is typically a good course. The Greater Mankato area already excels in these two sports so consider expanding the season by adding full artificial turf fields and lights to extend the playing day. The existing facilities are already regional destinations and improvements like turf and lights make them more relevant.

Park Elements-This is another feature where the Greater Mankato area already excels. Trail capacity is excellent, and although it is not a regional sports destination, it is a huge factor in the livability of the community. Expansion in this area gives the general public a reason to move to the Mankato area.

Evaluation Concepts-This is a modified set of criteria from the Hennepin County Youth Sports Program used by the MASC to evaluate projects on behalf of the county. The criteria were established by the elected officials of Hennepin County. In addition, the Facilities Development Committee of the Mankato Sports Commission in 2015 developed a scoring rubric that largely tracks the elements used by MASC.

Partnerships-Projects that have active partners – other public entities or private organizations – involved in contributing funds or a formal agreement to manage, maintain, or use the facility. Of particular importance is a formally executed agreement to rent space in facilities over a 15 to 20 year period.

Increased Capacity-The highest order is for building new facilities. Following this is expanded athletic or recreational opportunities at existing facilities. Adding elements which extend the playing day, such as lights, or extend the playing season, such as artificial turf also create increased capacity.

Improved Conditions-Demonstrating existing recreational opportunities would be improved. Making a facility more "playable" for the participants also makes the facility a more desirable destination. The element of making the area a more desirable place to live, work and raise a family should be considered.

Community Support-Demonstrated non-monetary support of community organizations, such as volunteer hours, official letters of support, or a commitment to help maintain the facility.

Number of Residents Served-Self-explanatory.

User Demographics-Socio-economic factors of the user groups. Can the facility leverage participation in lower socio-economic populations.

Environmental Improvements-List and describe all environmental improvements. Going green is an important element in managing lifetime operating costs.

Stewardship and Sustainability-Responsibly maintain current facilities and provide long-term operational support and maintenance for the proposed facility.

Regional Significance-This is the driver of an increase in the tax base so there are two elements here. The first is an ongoing increase in the tax base by making the area a place where the general population would like to live. The second is using the facilities to generate economic impact through sports tourism. Bring non-residents, participants and their parents, into the area who utilize local hotels and restaurants and pay entry fees for the events.

Facility Owners-From our discovery meetings it is clear the primary facility owners in the Greater Mankato area are the two cities and the school district. Additionally, MSU-Mankato, Bethany, ASA and possibly South Central College could be owner/operators of new facilities. Of the entities listed, the MASC has only seen the long-range development plan of MSU-Mankato. However, in our experience most recreation facility development occurs with strong local government/school district leadership and partnerships with other government or private entities.

Prior to making any further recommendations to the community partners, we would suggest the following:

- MASC staff come to Mankato/North Mankato for a day or two for a deeper look at the mid and long-range plans of the facility owners.
- The community formally establish a set of criteria for the evaluation of facility projects using the list above and previous work done by the Facilities Development Committee as a starting point. The sales tax policies adopted by the Mankato and North Mankato Councils should also be incorporated in such criteria.
- Secure a facility consultant that can apply the criteria to a list of potential projects which would include consideration of current utilization of existing facilities and the potential for growth through expansion. Fully vet the projects then determine which fit within the long-range plans of the facility owners and which will require "new" ownership.

Let us know how you'd like to proceed in 2018. At your service.

Regards,
Steve Olson, JD MPP
Chief Operating Officer
National Sports Center Foundation

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SECTION THREE

Initial MASC Summary Letter

Initial summary letter that was provided by MASC. This letter was expanded on in much greater detail in their subsequent report.

Anna Thill
Visit Mankato, President
11-3-17

Anna,

Over the past two months staff of the Minnesota Amateur Sports Commission have interviewed policy makers, facility owners, and sports organizations in the Greater Mankato Area. This purpose of these meetings was to gather information on the current state and future needs of sports organizations and facility operators in the region. They were also designed to assist policy makers in determining the most effective manner of applying funds realized from a local sales tax to sports facilities.

We interviewed user groups involved in field sports (including large format indoor spaces such as bubbles), court/indoor sports, aquatics, and ice sports. We also interviewed property owners including colleges and universities, school districts, municipalities, the YMCA and private operators. In all, the meetings were very positive and clearly showed a need for additional sports space on the part of the local organizations. The facility owners were also very positive about the opportunity to expand and to work with the local user groups.

At the start of this project the MASC was tasked with delivering opinions on a regional sports facility concept. A concept that would create a sports destination(s) for the Greater Mankato Area and that would increase the sales tax base through an increase in lodging room nights. Although the information presented shows a clear path to excellent local facilities, there is not a clear path to a regional presence. This issue need to be addressed by policy makers prior to moving on.

The interviews with local sports organizations produced one significant concern, that being affordability. The hourly rental rates currently being paid by these groups are very low when compared to rates in the Twin Cities. New facilities would likely require rates to increase to offset operating costs. This may create significant affordability issues for families with children in sports groups. Since the proceeds of the sales tax are not to be used for operating expenses, a more thorough analysis of operating costs and potential subsidies required by the facility owners is needed.

A final observation is that all of the sports organizations cited limited space as an impediment to growth. A concern in the opening of any new sports facility is that you have simply moved the activity from an old building to a new one and there is no associated growth. Increased capacity at the local level should promote growth but also needs to provide enough capacity to fulfil the needs of a regional sports destination. Greater detail on current capacity and use is needed; then a prospective look at new capacity and use.

As has been said in all of the meetings, this is a remarkable opportunity for the Mankato Area and we continue to look forward to assisting your policy makers in advancing this program.

Steve Olson, JD MPP
Chief Operating Officer
National Sports Center Foundation

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SECTION FOUR

User Groups

A list of user groups that were invited to participate in the September meetings.

Sports Association Pod Invites

Facility	Sport Association Contacts
ICE	Mkto Area Youth Hockey Assoc.
ICE	Mankato Figure Skating
ICE	Mankato Curling Club
TURF	Mkto N. Mkto Youth Football
TURF	Mkto Area Youth Baseball Assoc.
TURF	Mkto Area Girls Fastpitch Assoc.
TURF	United Soccer
TURF	Mankato Area Softball
TURF	LEEP
TURF	Mankato Area Lacrosse
COURT	Mankato Basketball Assoc.
COURT	Mankato Pickleball
COURT	West Area Volleyball Association/ Minnesota Attack
COURT	Mankato Wrestling Club
COURT	LEEP
COURT	Greater Mankato Tennis Assoc.
POOL	MANTAS

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INDOOR MULTIPURPOSE SPORTS FACILITY MARKET FEASIBILITY REPORT

**Prepared for:
City of North Mankato, MN**

**North Mankato, MN
February 2019**

PI Sports, LLC, 12468 La Grange Rd, Suite 337, Louisville, KY 40245
Contact Norm Gill, norm@pinnacleindoor.com, (502) 551-1974



February 2019

To the Officials of the City of North Mankato, MN:

This is the final report regarding the market feasibility study we performed for a proposed indoor multipurpose sports facility in the North Mankato, MN, market. The attached document summarizes our research and analyses and is intended to assist you in making informed decisions regarding the future of the facility.

The conclusions contained in this report are based on the estimates, assumptions and other information developed from our research of the market; our knowledge of similar sports complexes; and our experience operating our own facilities. We analyzed all the information provided to us, including the management of competitive/comparable facilities in your market; local and regional sports organizations; demographic characteristics of the defined market; and other sources. We then applied our years of experience to provide you with our best professional recommendations.

We sincerely appreciate the opportunity to assist you with this project and would be happy to be of further assistance in the interpretation and application of the study's findings. After you've had time to digest the findings of this report, we recommend a follow-up conference call to answer any outstanding questions you might have.

Thank you for choosing Pinnacle.

Norm Gill
Pinnacle Indoor Sports
(502) 551-1974

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Plus: Detailed Demographics Reports	
Greater Mankato Regional Recreation Facilities Development Update (2017)	
Greater Mankato Community Tennis Association “Hub” Report (2015)	

Executive Summary

Pinnacle Indoor Sports (referred to as “Pinnacle” throughout) was retained to conduct a thorough study to determine the viability of an indoor sport facility in the North Mankato market.

Findings

Pinnacle interviewed more than two dozen representatives from local and regional organizations — a great majority of whom cited a need and/or desire for an indoor recreational/sports and tennis facility with hard courts in the North Mankato market. Additionally, Pinnacle studied current market conditions/demographics and evaluated existing multipurpose sports facilities.

As a result of this research, Pinnacle determined that unmet facility demand exists in the North Mankato area for the following sports:

- Indoor youth and adult soccer/futsal
- Indoor youth and adult volleyball
- Indoor youth and adult basketball
- Indoor tennis
- Indoor hard-court rentals

In developing its facility recommendation, Pinnacle made the following four assumptions:

1. The project shall be constructed with funds generated from the 2016 sales tax extension approved by taxpayers.
2. The land would be readily available at no cost to the City of North Mankato.
3. The City of North Mankato would be exempt from paying property taxes on the proposed facility.
4. The City of North Mankato will offset some of the proposed facility’s operating expense, i.e. facility and grounds maintenance, liability insurance, and administrative costs.

With those assumptions in mind, multiple factors emerged that indicate the likelihood of a new indoor sports facility succeeding in the North Mankato market. They include:

- **A climate with a longer winter season than other areas of the Midwest.** A climate-controlled indoor facility would allow for year-round training and leagues in the North Mankato market, as well as provide a comfortable indoor environment during warm summers.
- **Healthy increases in population and household growth.** Both demographic factors suggest that a small multipurpose sports facility would be successful in North Mankato.
- **Heightened public interest.** Of particular note are representatives from area basketball and volleyball organizations and school districts, who indicated they would be interested in forging strategic partnerships with the operator of a new indoor sports facility to help ensure its success. That said, price points would need to align with local market rates.



The PAC
Austin, TX

Additionally, representatives of other local sports programs Pinnacle interviewed indicated a desire to partner with the operators of a proposed indoor facility for various programs, leagues and tournaments. They include:

- Greater Mankato Community Tennis Association
- Mankato Area Pickleball Association
- Mankato Basketball Association
- Mankato United Soccer Club (futsal)
- Minnesota Attack (volleyball)
- Minnesota Rise (basketball)
- Minnesota Youth Soccer Association (futsal)

Pinnacle also is aware of the following indoor sports facilities and YMCA expansion plans in the works in the North Mankato market:

- Mankato State University plans to open an indoor turf facility by October 2019.
- Bethany Lutheran College is considering construction of an indoor turf and 200-meter track facility/fieldhouse, plus an outdoor turf field. As of the writing of this report, the college was awaiting final drawings, approval from the board of trustees and funding for the project. If the plan falls through, college officials told Pinnacle they would consider adding a dome over the outdoor turf field.
- Mankato Family YMCA plans to begin a capital funding campaign in November 2019 to build a new facility (pending the results of a financial pro forma). Elements under consideration include:
 - Four basketball courts
 - Indoor tennis courts
 - 12-lane indoor pool

For more information, see the attached “Exhibit I—Selected Interview Notes” and “Exhibit II— Existing Facility Competition.”

Recommendation

Based on existing conditions and assumptions, Pinnacle recommends the City of North Mankato move forward with plans to build a 44,000-square-foot multipurpose indoor sports facility in North Mankato.

It would include one multisport space that converts to offer combinations of the following: two regulation basketball courts, two futsal courts, four regulation volleyball courts or four elementary-/middle-school size school basketball courts, plus a separate area for three indoor tennis courts. This facility would satisfy current market needs.

A second, larger option (based on available funding and community desire) would allow for construction of an 88,000-square-foot facility that would house one multisport space that converts to offer combinations of the following: four regulation basketball courts, four futsal courts, eight regulation volleyball courts or eight elementary-/middle-school size school basketball courts, plus a separate area for six indoor tennis courts.

The larger facility design would not only meet current market needs, but also allow North Mankato to compete for regional tournaments and larger recreational events as a regional sports tourism destination — particularly for weekend basketball and volleyball tournaments.

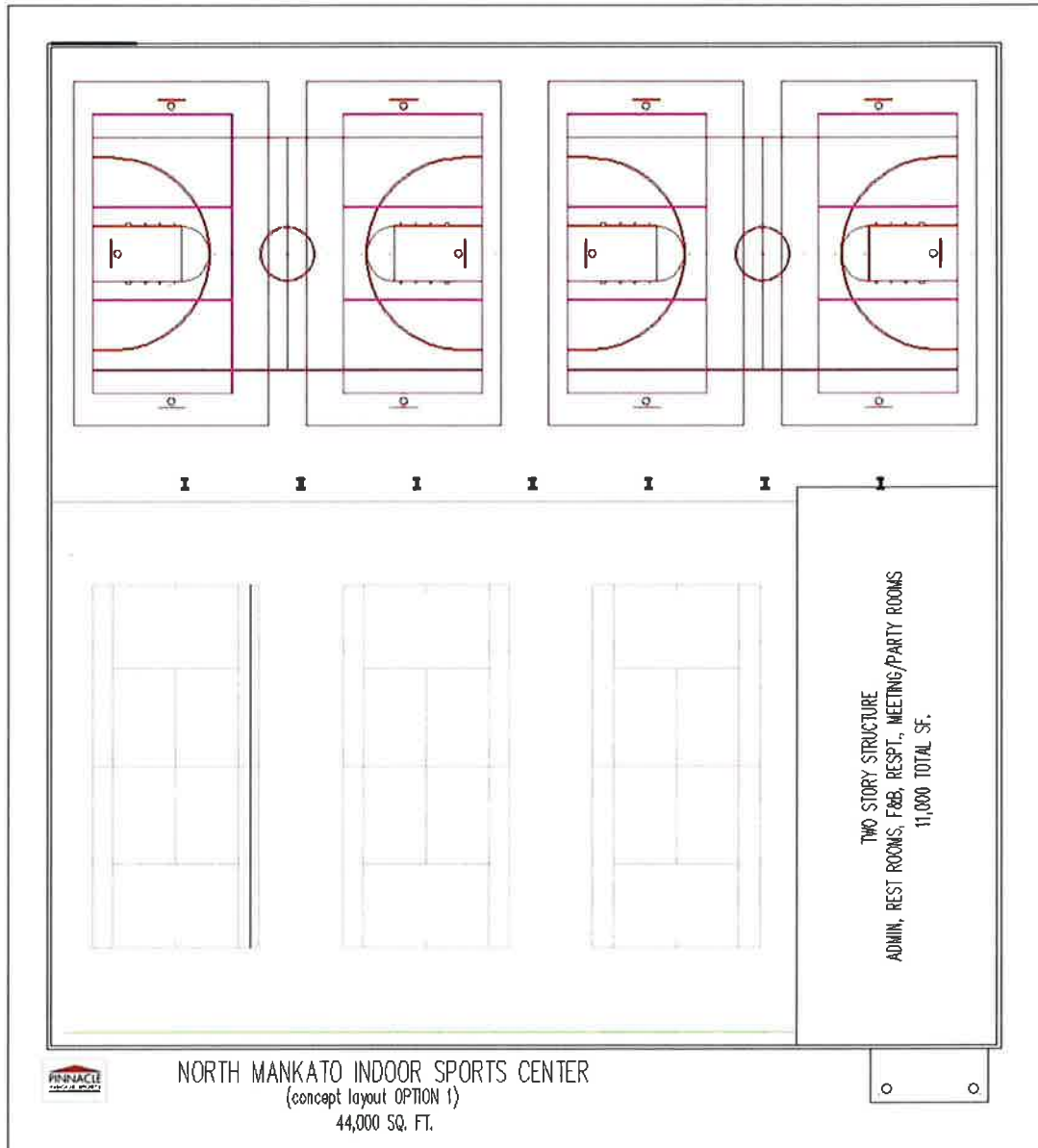
It should be noted that there is not an appreciable difference in the ongoing operating costs of the two options.

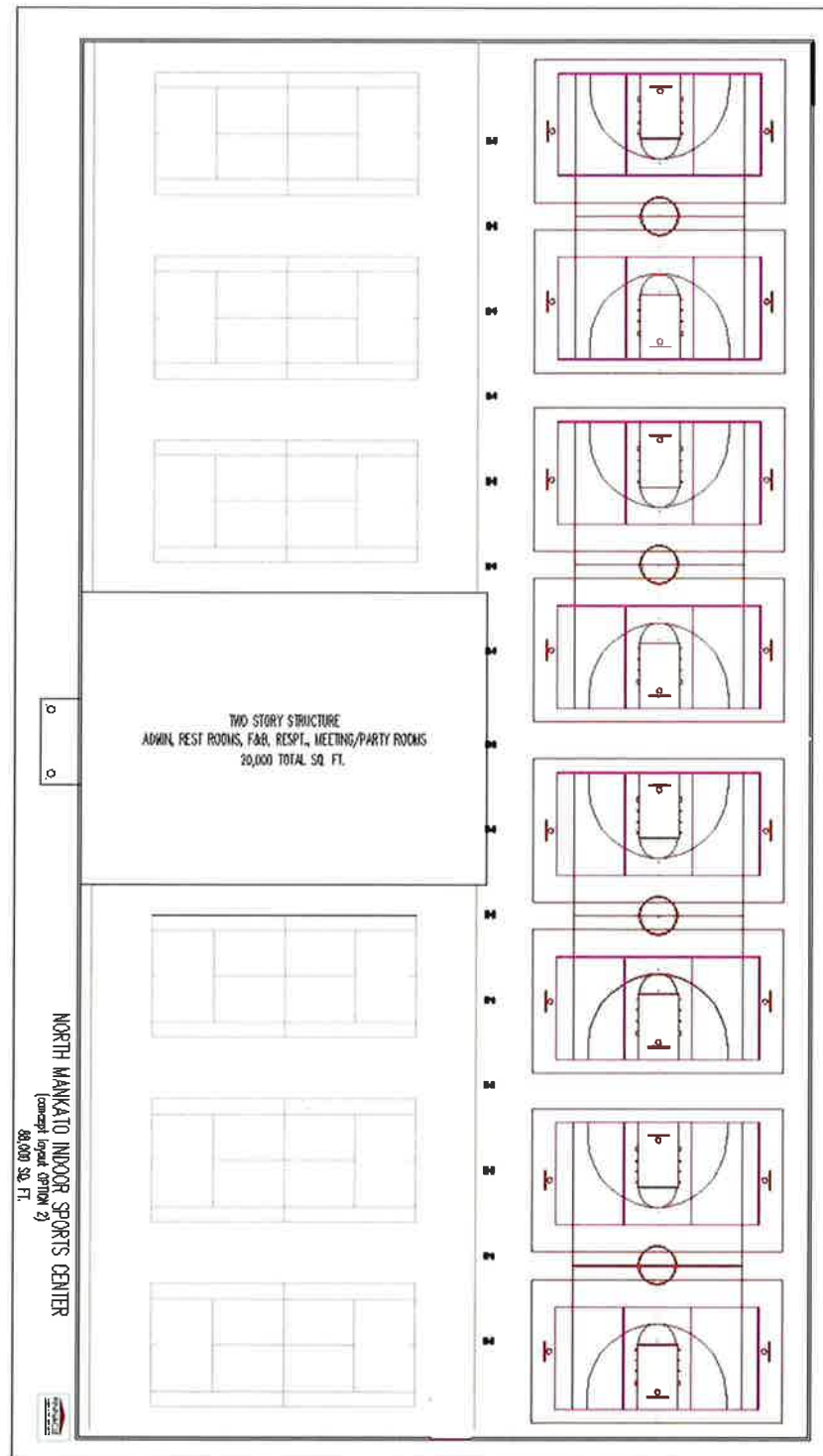
For proposed floor plan configurations and sports utilization examples featuring both options, see proposed floor plans on pages 8 and 9.

For more information, see the attached “Exhibit I—Selected Interview Notes” and “Exhibit II— Existing Facility Competition.”

Next Step

Pinnacle recommends additional community discussions regarding public preference for either a 44,000-square-foot or 88,000-square-foot facility.

Recommended Proposed Floor Plan (44,000 square feet)

Recommended Proposed Floor Plan (88,000 square feet)

Study Overview

As referenced in the Executive Summary, Pinnacle was commissioned to assess the feasibility of building an indoor multipurpose sports facility in the North Mankato, MN, market. Pinnacle's charge was to determine the feasibility of an appropriately designed sports facility with the following goals:

1. Provide an evaluation of potential demand and market support for an indoor sports development
2. Recommend the most beneficial programming mix to balance the largest number of participants and highest revenue generation for the facility
3. Provide design specifications for the right-size facility according to the estimated utilization projections that would put it ahead of local and regional competition.

Assumptions

The conclusions and recommendations of the study are based on the following assumptions:

1. That information received from sources, including other facilities, is accurate and complete.
2. That the supply of these types of facilities in the local and regional market area will not differ significantly from what already exists in the area today.
3. That the general national, state and regional economic outlook will not change markedly.
4. If a facility is developed, it will be of the highest quality, using state-of-the-art equipment, imaginative design and be properly capitalized.
5. If a facility is developed, competent and professional management will operate and market the facility.



The study and resulting recommendations were conducted by Pinnacle Indoor Sports — a leader in the development of sports complexes and recreational facilities in the United States. Pinnacle was founded in 2000 by experienced sports center owners and operators Steve Michener and Norm Gill to respond to the demand for professional planning and financial and management services in the indoor sports facility market. During the past 19 years, Pinnacle has provided sports complex planning, funding support, development, design and construction management, and operational services to more than 300 communities.



Research

Pinnacle Partner Sam Migliano conducted telephone and email interviews with individuals representing various organizations in North Mankato to assess the local and regional sports markets as they relate to development of a proposed indoor facility.

Research conducted for this study included interviews with the following groups:

- Apple Valley Volleyball
- ARJO (Volleyball)
- Belle Plaine Juniors (Volleyball)
- Bethany Lutheran College
- D1 Minnesota (Basketball)
- Greater Mankato Community Tennis Association
- Mankato Area Girls Fastpitch Association
- Mankato Area Pickleball Association
- Mankato Area Public Schools - Mankato West
- Mankato Basketball Association
- Mankato Family YMCA
- Mankato United Soccer Club
- Minnesota Attack Volleyball
- Minnesota Comets (Basketball)
- Minnesota Heat Basketball
- Minnesota Rise (Basketball)
- Minnesota State University, Mankato
- Minnesota Youth Soccer Association
- St. Peter Youth Basketball Association
- USA Volleyball - North Country Region
- Visit Mankato (including Sports Commission + Greater Mankato Growth)
- Waseca Basketball Association

A review of the area's existing facilities also was conducted. Additionally, Pinnacle performed a demographics analysis of the market and compared it to other markets with successful privately financed indoor sports facilities. Finally, a review of national, regional and local sports organization participation rates and trends was undertaken.



The Centre
State College, PA

Methodology

The methodology employed by Pinnacle in conducting this market feasibility study includes a review of quantitative and qualitative data from local and regional sources.

Quantitative Data

This review includes a search of primary and secondary sources to define the North Mankato market relative to the stated objectives and provide lines of inquiry for the next stage of qualitative research.

Specifically, the quantitative research phase gathered information on local, regional and national usage of indoor venues by sports and recreation groups, as well as a demographic study of the defined market.

Additional data gathered provides indications regarding local and regional sports activity trends. The quantitative research provides the following information:

- Regional and local trends in sports participation by targeted sports and activities
- Trends in size and type of indoor facilities by targeted sports in similar communities
- Disposable income/recreational spending patterns by local user groups

Research began within the North Mankato area, examining current recreational sports user groups, as well as sports organizations in the extended market outside the immediate area. The information obtained allowed for assessment of the area's sports venue needs and projected participation patterns of each group.

A wider regional data search using Internet sources, industry websites and publications, and personal contacts was included to evaluate the potential regional draw for special events such as tournaments and other activities. Regional sports and recreation groups were identified and inventoried based on the organizations' number of participants, current activities, facility utilization and participation statistics.

The local and regional demographics were analyzed using the most recent data from Environics Analytics, based on U.S. Census Bureau data (see "Attachment — Detailed Demographics Reports" for background).

Qualitative Data

Qualitative data research seeks to provide information beyond facts, such as personal descriptions/observations, user group intentions and industry trends gathered via personal interaction with potential user groups/area insiders. Focused research was used to explore and understand the real need for (and potential users of) a new facility. The qualitative research phase probed the following:

1. What user groups would benefit from a new indoor sports/recreation facility?
2. What sports and activities do the potential user groups represent?
3. What utilization rate (number of hours) is desired by identified user groups?
4. What time parameters (hours of day, days of week, times of year) are most desired by user groups for facility usage?
5. What types of venues are needed (hard courts, turf)?
6. What size venue is desired/needed by the identified user groups?

To better identify these needs, Pinnacle interviewed the following groups:

- Group 1: Local government staff
- Group 2: Local and regional sports association representatives
- Group 3: Operators of existing sports/recreation facilities
- Group 4: Educational leaders and professionals
- Group 5: Nonprofit organizations

Pinnacle's approach to researching groups was via telephone interviews and e-mail interviews. Pinnacle introduced the purpose of the study and sought comments on personal, organizational and community needs for the proposed facility as these groups saw them (see "Exhibit I—Selected Interview Notes").

During the interviews, Pinnacle identified potential proponent groups and determined which ones might have interest and financial capability to play a significant project role.

Senior and junior staff members participated in the collection and analysis of quantitative and qualitative data.

Performance Steps to Assess Feasibility

In order to project the financial performance of the facility, Pinnacle Indoor Sports took three internal steps to assess feasibility. Those steps were:

1. Interview the client to understand the vision and goals.
2. Identify areas in which residents are underserved, based on needs and habits.
3. Analyze existing regional service providers and events to identify areas of opportunities to attract traffic from outside the immediate market area.

Market Area Description

For the purpose of this report, the local market area is defined as an area surrounding Mankato (see map below). Certain activities at a new indoor sports facility — including tournaments, clinics and camps — would likely draw from a broader area throughout the southern Minnesota region. Weekly programming, on the other hand, would draw from a more localized area.



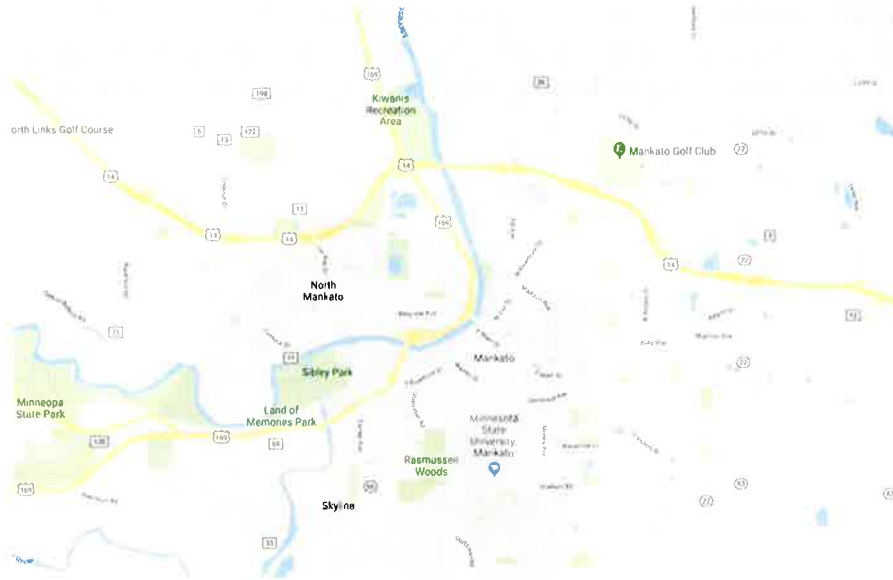
North Mankato, located in Blue Earth and Nicollet Counties in south-central Minnesota, is about a 90-minute drive from Minneapolis/St. Paul. The Minnesota River separates North Mankato from Mankato to the south, and North Mankato is the smaller of the two cities.

Climate

Average temperatures in North Mankato range from a low of 3 degrees Fahrenheit in January to a high of 82 degrees Fahrenheit in July. The city receives an annual average of 31 inches of rain and 39 inches of snow (compared to the U.S. average of 39 inches of rain and 26 inches of snow per year). The number of sunny days per year is 195; the U.S. averages 205 sunny days per year. North Mankato's harsh weather — which can include wind chill factors in the negative digits — often wreak havoc on outdoor sports, especially those with spring seasons.

Transportation

Although many roads lead to North Mankato, U.S Highways 14 and 169 are the two main routes in and out of the city.



Travel

Travel distances to North Mankato from major communities in the area with substantial sports organizations close enough to visit for tournaments or other events include:

<u>City</u>	<u>Distance</u>	<u>City</u>	<u>Distance</u>
Bloomington, MN	72 miles	Minneapolis, MN	83 miles
Rochester, MN	86 miles	St. Paul, MN	97 miles
St. Cloud, MN	108 miles	Mason City, IA	108 miles
Winona, MN	134 miles	Sioux Falls, SD	157 miles
Eau Claire, WI	175 miles	Sioux City, IA	191 miles

Employment

Among the largest employers in the Greater Mankato region are Mayo Clinic Health Systems, interactive print and marketing solutions giant Taylor Corp., and various educational institutions and government agencies.

Unemployment

The unemployment rate in the Mankato-North Mankato region hit a high of 7.1% in March 2010 and dropped to an eight-and-a-half-year low of 1.7% in October 2018. The latest unemployment figure available for the region is 1.7% (October 2018).

Demographic Market Analysis

General Population

The population in the designated market area (see map on page 13) was estimated to change from 142,079 to 146,881 between the 2010 U.S. Census and 2018, an increase of 3.4%. Over the next five years, the population of the designated market is projected to increase by another 2.7%.

By comparison, the U.S. population was expected to increase by 6.6% between 2010 and 2018. That population total is expected to increase by another 3.6% over the next five years.



The number of households in the market area was estimated to change from 54,463 to 57,440 between 2010 and 2018, an increase of 5.5%. Over the next five years, the number of households is projected to increase by another 3.4%.

By comparison, the number of households in the United States was estimated to increase by 7.1% between 2010 and 2018, and by another 3.7% over the next five years.

The size of the population base of the North Mankato market is in line with the population parameters of successful indoor sports facilities in other markets. The past and continued population growth in the area provides a margin of error as to the probability of a sufficient population to support an indoor sports facility.

Age Distribution

The 2018 median age in the North Mankato market is 35.5 years, while the 2018 average age is 38.5 years. In five years, the median age is projected to be 36.4 years.

By comparison, the median age in the United States in 2018 is 38.5, while the average age is 39.4. Five years from now, the U.S. median age is projected to remain at 39.5.

User statistics in other communities indicate that younger populations are more likely to participate in programs at indoor sports centers. That bodes well for a community such as North Mankato, where the population skews younger than the national average. Pinnacle anticipates widespread usage of a proposed indoor sports facility, based on a combination of age demographics, demand and local enthusiasm for this project.

Ethnic Diversity

Of the area's estimated 2018 population, 91.1% were White Alone; 3.1% were Black or African American Alone; 0.4% were American Indian and Alaska Native Alone; 1.7% were Asian Alone; 0.0% were Native Hawaiian and Other Pacific Islander Alone; 1.6% were Some Other Race; and 2.1% were Two or More Races.

Of the United States' estimated 2018 population, 69.8% were White Alone; 12.9% were Black or African American Alone; 1.0% were American Indian and Alaska Native Alone; 5.8% were Asian Alone; 0.2% are Native Hawaiian and Other Pacific Islander Alone; 6.9% were Some Other Race; and 3.5% are Two or More Races.

Education

An estimated 19.6% of the population over age 25 in the market has earned a Bachelor's Degree, 6.1% has earned a Master's Degree, 1.4% has earned a Professional School Degree and 1.7% has earned a Doctorate Degree.

In the United States, 19.2% of the population over age 25 has earned a Bachelor's Degree, 8.4% has earned a Master's Degree, 2.0% has earned a Professional School Degree and 1.4% has earned a Doctorate Degree.

**Income Statistics**

The average household income in the designated market is estimated to be \$77,962 in 2018, while the average household income for the United States is estimated to be \$89,646.

The average household income in the area is projected to increase over the next five years, to \$82,769, and the average household income in the United States is projected to increase to \$98,974 during the same time period.

Primary Market Area Demographic Summary

Taken collectively, North Mankato's demographics present a favorable case for the establishment of a new indoor sports facility in the market and suggest that such a facility would be successful, despite household incomes below the national average.



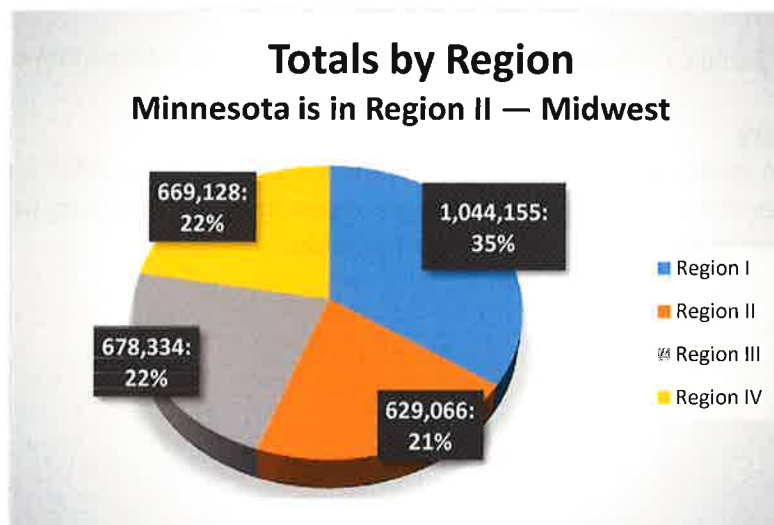
The Recreational/Competitive Sports Communities

Multiple sports communities exist within the target market study area. What follows is a synopsis of some of the major ones.

Soccer

Youth soccer in the United States is highly structured, with the majority of participants registered through the U.S affiliates of the sport's global governing body, Federation International de Futbol Association (FIFA). The United States Soccer Federation (USSF) delegates authority over youth soccer to the United States Youth Soccer Association (USYSA) and its member organizations. Formed in 1974 with 100,000 participants, USYSA now registers more than 3 million players between the ages of 5 and 19.

The USYSA affiliate for the target market area is the Minnesota Youth Soccer Association. The statewide organization boasts 52,000 youth players, with about 70 percent of them from the Twin Cities area. (About 8,000 players in Minnesota belong to the U.S. Adult Soccer Association.) The MYSA currently uses indoor sports facilities to host referee training, coaches' education and Olympic Development Program training.



Source: US Youth Soccer

Among the MYSA members in the North Mankato market is the Mankato United Soccer Club, which provides opportunities for 34 competitive teams (U9-U19) and 500 recreational players. Teams train at local school gymnasiums for a total of 100 hours in January and February, paying only \$5 per hour per court.



According to interviews with individuals associated with the Mankato United Soccer Club, indoor turf space in the market is limited, even with the pending opening of a dome turf facility at Mankato State University in late 2019. The club would be willing to consider a contractual arrangement to guarantee space and reduce the hourly cost of activities at a proposed new indoor facility.

Futsal and Adult Soccer

Futsal is in the early stages of development in the market, and the MYSA is looking for a facility with which to partner and provide futsal training and teams. Mankato United Soccer Club is interested in increasing futsal activity, too. Individuals associated with Futsal and the Adult Soccer League told Pinnacle there is reason to believe North

Mankato can be a regional draw for futsal tournaments.

Adult soccer also is popular but has room to grow. In fact, the North Mankato area may be an untapped market according to those associated with the sport.

See attached “Exhibit I — Selected Interview Notes” for more information on soccer.

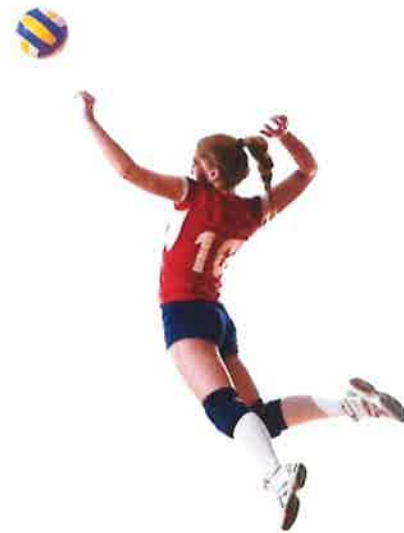
Soccer Summary

Demand for an indoor soccer/futsal facility in the North Mankato market is high, and representatives of soccer organizations appear eager to begin leveraging the futsal opportunities an indoor soccer facility would provide.

Volleyball

USA Volleyball is the national governing body for competitive youth club volleyball in the United States, with more than 325,000 members and an estimated 5,300 junior clubs.

In the target area, the North Country Region is the local regional volleyball authority of USA Volleyball, overseeing programs for juniors and adults, with a large percentage of those members coming from the Minneapolis/St. Paul area. The Executive director of the North Country USA Volleyball told Pinnacle that the region would be interested in hosting officials' training, coaches' clinics and other events at a proposed facility in North Mankato, as well as partnering to host tournaments.



Minnesota Attack Volleyball, echoed USA Volleyball's comments and stated there is a need for an additional indoor facility in the area that caters to volleyball. Teams currently train at facilities operated by the Mankato School District, as well as at the St. Peter Community Center, Mankato State University and other area recreation centers. They utilize between eight and 10 volleyball courts for 12 hours per week from November through March, paying between \$30 and \$100 per hour per court.

Other area volleyball clubs Pinnacle interviewed — including ARJO, Apple Valley Volleyball and Belle Plaine Juniors — indicated they would travel to North Mankato to participate in tournaments at a proposed facility.

Adult/Sand Volleyball

Adult volleyball is popular in the market, with park and recreation departments among the entities that host indoor leagues. Sand volleyball is in the early stages of development, and interviews with the Executive Director of the North Country Region suggests that sand courts be part of a proposed facility's plans.

See attached "Exhibit I — Selected Interview Notes" for more information on volleyball.

Volleyball Summary

Although some of the area's competitive volleyball clubs train at other facilities, they say they need more space. Additionally, other clubs from outside the immediate North Mankato area say they would travel to a proposed facility to compete in tournaments. Such factors justify the inclusion of hard courts in this project.

Basketball

Basketball is one of the most popular participatory sports in the United States and is fast gaining popularity around the world. In the United States, the Amateur Athletic Union (AAU) is the largest organizing body for youth basketball — overseeing organizations in several sports, with almost 700,000 members and more than 150,000 volunteers.

In the target market, at least one team is affiliated with AAU: The Minnesota Rise, which uses local school gymnasiums and pays between \$10 and \$15 per hour per court. Meanwhile, Mankato Basketball Association teams (which are not part of AAU) train at local schools in Mankato and occasionally the recreation center in Lake Crystal. They utilize eight to 12 courts from late October to early March for 75 hours per week; the fee is \$7.50 per hour per court on weekdays and \$25 per hour per court on weekends.



Representatives from both clubs also said they would consider a contractual arrangement to guarantee space and reduce the hourly cost of activities in a proposed new facility. So would the St. Peter Youth Basketball Association. A proposed facility would be a major asset to the Greater Mankato area — even though St Peter league teams currently practice for free at local high school gyms.

Other organizations, such as the independent Waseca Basketball Association, also train at local high schools and pay only \$2 per hour per court. Representatives from those teams said they would travel to North Mankato for tournaments.

Pinnacle also interviewed D1 Minnesota, whose director indicated teams would travel to North Mankato for tournaments only if D1 Minnesota were running the tournaments. Minnesota Heat also indicated the club would possibly participate in tournaments at a proposed facility in North Mankato. On the other hand, representatives from the Minnesota Comets said a two-hour-and-15-minute drive to North Mankato likely would be too far for players to travel.

Adult Basketball

Adult basketball is popular in the market, with multiple independent leagues offered.

See attached “Exhibit I—Selected Interview Notes” for more information on basketball.

Basketball Summary

The space needs for competitive, recreational and instructional youth basketball in the market — as well as additional outlets for adult basketball — justify the inclusion of hard courts in this project.

Tennis

Tennis, generally speaking, is a very individual sport, overseen by the United States Tennis Association (USTA) and regional organizations.

In the market area, the local organization is the Greater Mankato Community Tennis Association, which hosts youth, high school and adult tournaments. Representatives from those organizations told Pinnacle that there are about 150 high school tennis players in the market and as many as 400 youth players. He also said that, although an indoor tennis facility in Mankato closed in 2010, Gustavus Adolphus College allows groups to rent its indoor courts for tournaments.



Still, representatives from the Tennis association suggest the market could handle another seven or eight indoor courts for regular usage. To that end, a local resident has verbally committed to donating land for the association to build a new indoor tennis facility for year-round use.

Despite that prospect, the association suggested they would consider partnering with a proposed indoor facility that included tennis programming for tournaments, indoor leagues, court rentals, camps and clinics.

Additionally, the USTA has an established history in the Greater Mankato area, having provided some of the \$70,000 in funding for resurfacing/reconstruction projects for tennis courts at Mankato East and Mankato West high schools a few years ago.

A 2015 report (attached to the end of this report) prepared by the Greater Mankato Tennis Community Association outlined the organization's proposal for an indoor/outdoor "tennis facility hub" and cited competitive imbalances for Greater Mankato area high school tennis teams because the region lacks a quality indoor tennis facility. The report also projected that a new indoor tennis facility would significantly increase participation numbers among college and adult players in the market.

Admittedly, the indoor tennis segment of a multipurpose indoor sports facility can be challenging, but with effective programming strategies that cater to an active tennis community, a new facility in the North Mankato region likely would generate significant usage — especially between Labor Day and mid-May.

Adult Tennis

Outdoor adult tennis is popular in the market, but the GMTCA says no adult tournaments are available in the area, and a proposed new facility could change that. See attached “Exhibit I — Selected Interview Notes” for more information on tennis.

Tennis Summary

Tennis in the North Mankato market is healthy, as evidenced by the Tennis association’s contention that additional indoor playing space is needed beyond that which it plans to develop on its own. A proposed indoor multipurpose facility that includes a tennis component would allow for potential expansion of the local tennis market.

Pickleball

Pickleball, a hybrid of tennis, badminton and ping-pong, is considered one of the fastest-growing sports in the United States, with at least 2.5 million players (including many older adults.)

The sport’s popularity has been a long time coming. With a history dating back to 1965, pickleball most likely began when, according to the USA Pickleball Association website, “Joel Pritchard, [a] congressman from Washington state, and Bill Bell, [a] successful businessman, returned to Pritchard’s home on Bainbridge Island, Wash. (near Seattle), to find their families sitting around with nothing to do. The property had an old badminton court, so Pritchard and Bell looked for some badminton equipment and could not find a full set of rackets. They improvised and started playing with ping-pong paddles and a perforated plastic ball.”



Played indoors or outdoors with a paddle and a plastic ball, the court is the same size as a doubles badminton court, 20 by 44 feet. (The same pickleball court is used for both singles and doubles play.) The court is striped similar to a tennis court with left and right service courts, but there is a 7-foot zone in front of the net, called the “kitchen,” from which players are not allowed to volley.

Most games can be played within 20 minutes, and the social aspect is a key element of the game.

The USA Pickleball Association (USAPA), headquartered in Surprise, AZ, boasts about 30,000 members. In the Mankato area, there are about 170 members of the Mankato Area Pickleball Association — about 70 percent of which are retired adults. Players participate year-round, with the indoor season running from mid-September to April on basketball courts at the YMCA and school gymnasiums. Access to those facilities is limited, though, according to representatives of the association, and they believe there is a need for a new indoor sports facility that includes a pickleball component.

Interviews with local Pickleball representatives indicated to Pinnacle that the association not only would consider a contractual arrangement with a proposed indoor facility to guarantee space and reduce the hourly cost of activities, but it also would be interested in hosting tournaments at the venue. Additionally, the association would consider using the facility on a regular pay-as-you-play basis, occupying it from 8:30 to 11 a.m. every Monday through Friday from mid-September to May.

See attached “Exhibit I — Selected Interview Notes” for more information on pickleball.

Pickleball Summary

While Pickleball’s popularity is increasing, it is still considered an emerging sport. However, the sport’s ability to share programming space with tennis in an efficiently operated indoor space would fill daytime hours and possibly result in tournaments.

Softball

The number of softball players in the United States fluctuated between 9.4 million and 12.5 million between 2006 and 2017.

North Mankato's Caswell Park has a strong reputation and is a recognized destination for softball tournaments. Regarding indoor training space, the Mankato Area Girls



Fastpitch Association (with about 450 participants) has a three-year agreement with a hard-courts facility for use during the winter months, paying \$25 per hour. While that facility satisfies the club's training needs, Representatives from the Association said they would prefer an indoor turf facility be built in the Greater Mankato area.

See attached "Exhibit I — Selected Interview Notes" for more information on softball.

Adult Softball

Adult softball grew quickly, but participation numbers have flattened in recent years.

Softball Summary

The need for an additional indoor turf space for softball training is not great enough to justify the inclusion of turf in a proposed facility. That said, the installation of indoor batting cages and/or pitching lanes at a proposed indoor multipurpose facility could help diversify programming and attract new user groups.

High School Sports Trends

Potential demand associated with any indoor multipurpose sports facility is somewhat dependent on the attributes of the industry as a whole, as well as specific target market segments. This section outlines key high school sports trends that may impact operation of a new multipurpose sports facility.

The following information is from the 2017-18 High School Athletics Participation Survey, conducted by the National Federation of State High School Associations (NFHS).

The number of participants in high school sports increased for the 29th consecutive year in 2017-18, reaching an all-time high of 7.98 million — an increase of 17,351 from the previous year. This data is based on figures from the 51 NFHS member state high school associations, which includes the District of Columbia.

Minnesota ranks No. 10 in total high school sports participation (240,433 boys & girls).

Sports participation by boys and girls each hit record highs, with 4,565,580 boys and 3,415,306 girls.

Here are the top 10 boys' sports for the 2017-18 school year:

- | | |
|----------------------------|-------------------------|
| 1. Football | 6. Cross Country |
| 2. Outdoor Track and Field | 7. Wrestling |
| 3. Basketball | 8. Tennis |
| 4. Baseball | 9. Golf |
| 5. Soccer | 10. Swimming and Diving |

Here are the top 10 girls' sports for the 2017-18 school year:

- | | |
|----------------------------|------------------------|
| 1. Outdoor Track and Field | 6. Cross Country |
| 2. Volleyball | 7. Tennis |
| 3. Basketball | 8. Swimming and Diving |
| 4. Soccer | 9. Competitive Spirit |
| 5. Fast-Pitch Softball | 10. Lacrosse |

Ancillary Revenue Opportunities

Due to the nature of the sports and recreation business, a large number of spectators and sports participants regularly frequent a multipurpose indoor sports facility. This leads to a number of ancillary revenue opportunities that should be explored. They include:

- Sports Performance Training
- Food Service
- Parties
- Facility Rentals
- Retail
- Youth Development Programs
- Corporate Partnerships

Sports Performance Training

Many of the individuals interviewed for this report indicated a desire to see new sports performance training opportunities, and they say their players would consistently use such a facility.



Pinnacle-developed facility

Sports performance training can be implemented and overseen by hired staff in-house, in partnership with an area orthopedic or sports performance medical group or performance trainer, or simply via an independent group leasing space within a facility to carry out this type of activity.

As with any business model, a successful sports performance training facility requires proper management and marketing, as well as consideration of partnerships or franchise opportunities.

Food Service

Food service in sports centers has traditionally been in the form of a small concessions stand and/or vending area. Successful operators know that captive audiences can make for profitable food service operations if done correctly. Hot food options should be offered, along with fountain beverages (which are much less expensive to carry than bottles or cans). Additionally, a strict no carry-in policy should be enforced from Day One. The only exceptions to this policy can be for water bottles and/or private rentals that require more food service options, such as buffet or plate dinners, than are available through current facility offerings.

A proactive marketing campaign also should be employed to package food into “meals” and to offer coupons to current participants as part of a membership program or to include certain food or beverage items with tournament or party packages for groups.

Parties

Birthday, team, school and corporate parties are strong sources of income for any indoor sports center. Parties should be offered in “packages” to help users create the experience they are looking for while helping the facility ensure maximum revenue. In general, parties can be considered facility rental income, as the party customers primarily utilize facility time when conducting their parties.



Pinnacle-developed facility

In addition, opportunities exist to include food and beverage items, party decorations, gifts, staff (party supervisors and on-field attendants), equipment rentals and more — all at a mark-up for extra revenue. Local companies (bakeries, pizza places and party-supply businesses) should be considered for partnership opportunities for parties, similar to food-service partnerships.

Meeting rooms and field space can be used to host parties; specific party rooms are not needed unless a facility has the space available and parties become a much larger portion of total revenue. Parties are a significant source of revenue that should not be overlooked.

Facility Rentals

Traditionally, sports facility rentals are considered only by sports organizations. Additional revenue opportunities, however, also exist via non-sports businesses and organizations looking for open spaces to host staff outings, corporate get-togethers and team-building sessions, or even small expos and trade shows.



Pinnacle-developed facility

Meeting rooms should be designed with sufficient electrical needs for multiple computers and can include built-in overhead projectors, white boards, blackout curtains for windows or doors, and Wi-Fi to ensure that any meeting can be held with ease. Additionally, the facility should be designed with at least one large (14-foot) overhead door, the ability to remove boards on court or turf surfaces as needed for the entrance of large vehicles and equipment, sufficient electrical (in some cases panels that drop from the ceiling), sufficient building egress and air exchange capabilities.

Retail

Retail components can be another source of revenue for indoor sports facilities. Past experience in owning and operating indoor sports facilities has shown that the best retail opportunities are those in which an already established local business leases space from the sports center as a satellite store to their main business.

Pinnacle does not recommend the inclusion of an in-house retail component, opting instead to contact existing retail sports stores to see if any of them would be interested in dedicated space to accommodate an existing or expansion location.

Once a new facility becomes more fully established, a line of apparel could be offered as part of the membership offerings (free T-shirt when signing up, for example) and sold on a limited basis for additional community marketing through the facility's front desk component.

Youth Development Programs and Summer Camps

Daytime programming opportunities for ages 1 to 5 will be an attraction for young families to join the facility and sign up for other activities as children get older.

Similar programs at other facilities have included open playtime, "mommy and me" classes, homeschool association rentals, senior programming and special events.



Pinnacle-developed facility

Additionally, daycare centers, preschools and school groups should be solicited for facility rentals during weekday time slots between 7 a.m. and 3 p.m. These groups also help build the facility's database (via participant insurance waiver forms) for future youth program marketing.

During the summer months, general summer camps (and separate sports-specific camps) can be held during weekday daytime hours for children too old for daycare but not yet old enough to stay home alone. General summer camps with field trips, arts and craft activities, and a variety of sports experiences can provide a significant source of income during the summer months, as can sports-specific camps and training opportunities.

Corporate Partnerships

Corporate marketing partnerships, sponsorships and more modest advertising arrangements for outside businesses normally provide significant revenue that can be in place by opening day, thereby providing critical cash flow as a new facility grows to capacity. That being said, this is the one area of the indoor sports industry that experienced a downturn during the recent Great Recession. Although revenues are not what they once were, interest is returning, and this remains a very viable source of significant high-margin revenue that is often overlooked.

Past experience has shown that commercial arrangements with local businesses in the fields of medical services, auto dealerships, financial institutions, soft drinks and beer, pizza, cellular phones and sporting goods all are prime prospects in competitive situations. Industries catering to new home construction and existing homeowners also generate above-average partnership revenues. Related businesses such as real estate professionals, relocation companies, home-security providers, landscapers and furniture stores are prime prospects, as well.



Pinnacle-developed facility

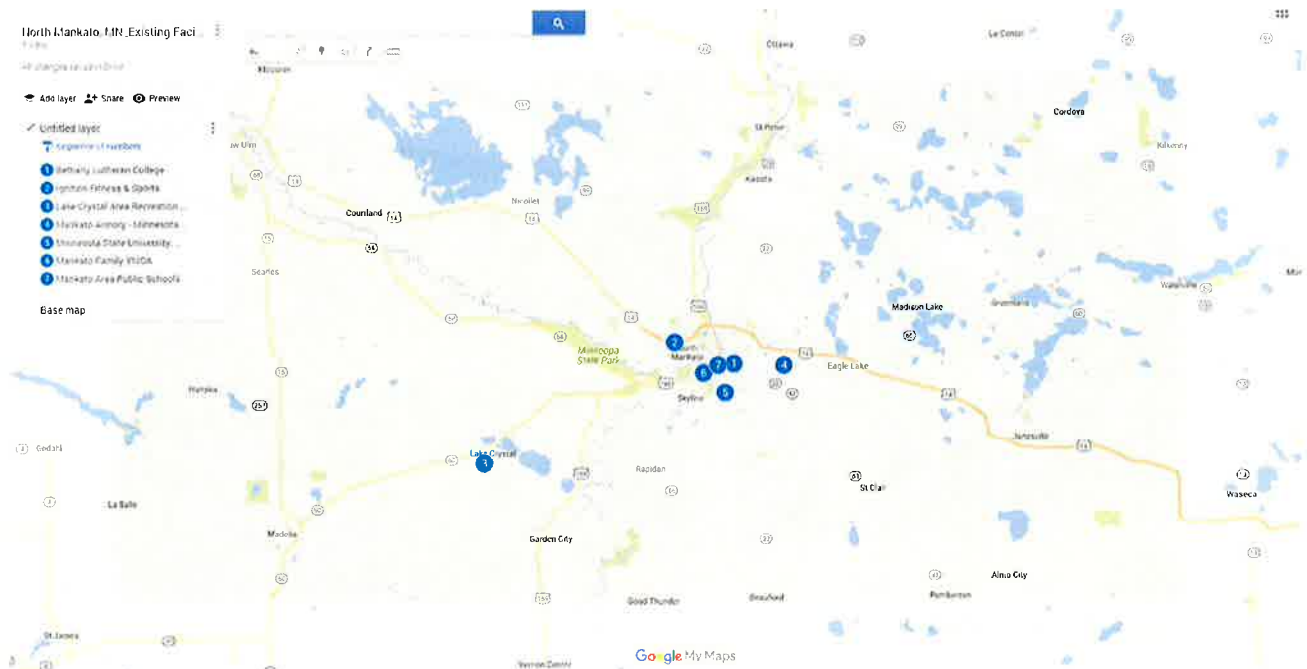
Competition

At least three multipurpose indoor sports facility developments are in the works in the North Mankato market, but two of them target turf sports and/or track and field. Mankato State University plans to open an indoor turf bubble by October 2019, and Bethany Lutheran College is considering construction of an indoor turf and 200-meter track facility/fieldhouse.

Mankato Family YMCA, meanwhile, plans to begin a capital funding campaign in November 2019 for a new facility that could include indoor tennis courts, basketball courts and a 12-lane indoor pool. That project, should it receive the green light, would happen after the design and construction of the City of North Mankato's proposed indoor facility, giving the recommended project a leg up on any increased competition.

Several Mankato-area sports groups already use indoor gymnasiums at local high schools to meet their indoor sports needs, paying reasonable fees with which the city would have to compete. The proposed facility also would need to provide outstanding service and amenities previously unavailable in the market to make it even more appealing to various user groups.

For complete descriptions of the existing sports facilities in the North Mankato market study area, see the attached "Exhibit II— Existing Facility Competition."



SWOT Analysis

Through multiple meetings/interviews; a site visit; demographic research; competition and sports asset analysis; tours of competing facilities; and other market research; Pinnacle identified a range of market characteristics and priorities. The primary driver throughout this process was to analyze the potential for a new multipurpose indoor sports recreation facility in the North Mankato, MN, market.

The following is a summary of some key attributes and advantages and potential and existing challenges:

S**Strengths**

- Baseball, softball, soccer and basketball are popular sports in the area
- North Mankato is located relatively close to major highways and/or roadway access
- Population growth in the Greater Mankato market

W**Weaknesses**

- Average household income is below the national average.
- Low price points for indoor facilities via local recreation facilities and schools.

O**Opportunities**

- Strategic alliances/partnerships with local sports organizations
- Excess demand for market-priced court facilities
- Some current indoor facilities rank average to below-average in quality
- Opportunity for extended indoor programming, due to long winters

T**Threats**

- Number of competing facilities in the market
- Other private and/or public sports leagues or programming offered in the market
- Proposed development of new facilities

Contributors to Project Success

Pinnacle identified multiple factors that are potential contributors to project success. Their impact will be quantified in the full financial forecast. These factors include:

- ***Destination Appeal:*** One of the primary factors in attracting programming, tournaments and participants is the appeal of the destination/location.
- ***Public Support:*** Successful public or private facilities begin with key institutional alliances that allow for a high level of support throughout the planning, zoning, construction and ongoing operations processes. There has been a positive response to the project from several key organizations in the local market.
- ***Sports Participation:*** The majority of user groups in the local market displayed enthusiasm for the project.
- ***Market and Demographics:*** The North Mankato market is attractive in terms of population size and age, and it boasts strong sports communities. A proposed facility likely would capitalize on interest and participation as soon as it opens.

Challenges to Project Success

As is the case with many new developments, obstacles must be overcome to create and maintain an economically viable and financially sustainable facility. They are outlined below:

- **Cost to Operate:** As indicated in the financial model provided, there is an ongoing cost to operate an indoor sports facility.
- **Balance of Tournaments vs. Local Programming:** Although there will be limited instances in which local programming competes for time and space, an indoor facility also will fill a local void. Facility management must be clear in its scheduling and messaging, ensuring local users are aware of tournament/event plans and do not expect access when the facility is programmed for the purposes of boosting economic impact.
- **Market Rates:** In order to mitigate the need for ongoing subsidization or financial loss, the operations team must charge full market rate for space.
- **Current Market Amenities:** Some of the market's existing amenities have solid reputations. Additionally, as previously noted, the Mankato Family YMCA is exploring expansion, and Mankato State University plans to open an indoor turf facility by October 2019. Bethany Lutheran College also is considering the addition of an indoor turf facility and fieldhouse. In order to enter the North Mankato market, city officials must be confident in the facility's ability to generate income that meets expectations.

Snapshot: Possible Operating Model

Scope	Includes
Geographic Service Area	North Mankato, MN
Members and Program Participants Served	Athletes (High School) Youth & Teens Adults & Families
Funding/Revenue Sources	Youth & Adult Leagues Youth & Adult Tournaments Adult Sports Sports Performance Training Youth Programing Special Events & Instructional Clinics Summer & Sports Camps Drop-in Play Private & Group Lessons Facility Rentals Food & Beverage Marketing Partners Memberships

Facility Competitor Analysis

Direct Competitor	Substitutable Competitor	Resource Competitor
<ul style="list-style-type: none"> Private indoor sports facilities 	<ul style="list-style-type: none"> Club teams with training facilities Sports performance facilities with turf or court venues Baseball/softball indoor training facilities 	<ul style="list-style-type: none"> Local Schools/Institutions Local Churches & Youth Organizations Parks and Recreation YMCA

Trends Analysis

Types of Trends	Direction of Trend	Comments
Social needs or demands for programs or services	Needs or demands are: (x) Increasing	<ul style="list-style-type: none"> Economic Issues – income disparity Aging population in community
Other trends impacting your community/market		<ul style="list-style-type: none"> Competition from school/community centers for sports/afterschool programs Quality of indoor turf/court venues City population increasing annually

Strategic Market Review

Pinnacle reviews the quantitative and qualitative market research according to historical case studies and then provides an internal grading system using the following criteria:

1=lowest / 5=highest

Focus Criteria	1	2	3	4	5
Vision/Mission					
<input type="checkbox"/> Supports the client's vision/mission.				x	
Strategic Advantages					
<input type="checkbox"/> Opportunities for collaborative strategic partnership(s).				x	
<input type="checkbox"/> Improves the market position.			x		
<input type="checkbox"/> Break even or produce a profit/surplus within 3 years.			x		
<input type="checkbox"/> Demonstrates a community benefit.				x	
<input type="checkbox"/> Maintains a mix of programs which profits/surplus or breakeven within 2 years.			x		
<input type="checkbox"/> Local and/or state political office positive about the project.					x
<input type="checkbox"/> Local user groups would utilize a new indoor sports facility.				x	
Financial Viability					
<input type="checkbox"/> Appears to make financial sense.			x		
<input type="checkbox"/> Estimates of measurable outcomes are available to input in the pro forma financial projections.			x		
<input type="checkbox"/> A real need exists with a sense of urgency.				x	
Geographical and Customer Scope					
<input type="checkbox"/> Will not interfere the service area of other competitors/existing facilities.		x			
<input type="checkbox"/> Area provides a welcoming, positive, safe and approachable environment.					x
<input type="checkbox"/> Geographic reach; strong. Demonstrate analysis of unmet needs and underserved groups within the service area.			x		
Positioning in the market place as a Leader or Collaborator					
<input type="checkbox"/> Demonstrate opportunity for strategic partnerships.				x	

Exhibit I: Selected Interview Notes

North Mankato, MN

Baseball/Softball

- Mankato Area Girls Fastpitch Association

Basketball

- D1 Minnesota
- Mankato Basketball Association
- Minnesota Rise
- Minnesota Heat Basketball
- Minnesota Comets
- St. Peter Youth Basketball Association
- Waseca Basketball Association

Soccer

- Minnesota Youth Soccer Association
- Mankato United Soccer Club

Tennis & Pickleball

- Greater Mankato Community Tennis Association
- Mankato Area Pickleball Association

Volleyball

- ARJOApple Valley Volleyball
- Belle Plaine Juniors
- Minnesota Attack Volleyball
- USA Volleyball - North Country Region

Other

- Bethany Lutheran College
- Mankato Family YMCA
- Mankato Area Public Schools
- Minnesota State University, Mankato
- Visit Mankato

BASEBALL/SOFTBALL

Mankato Area Girls Fastpitch Association

- There are numerous hard-court locations in the market, but many are very busy during the winter months
- Depending on the type of facility, the proposed development could be a nice addition to the market. Usage costs would be a concern, but adding court space is a good thing for the area
- Availability of indoor space is tight. The club spent two or three months in late 2017 looking for a space for winter training use and found a solid option for three years
- Season is mostly year-round. October and November are the only months during which there are not training or games
- About 450 kids participate in the club
- The club utilizes a gym, and rental fees are \$25 per hour. Additionally, the club has donated resources to improve the space, as the club believes the rental fee is reasonable and wants to help the current owner make improvements (such as better lighting and potentially repainting the space)
- The gym meets most of the club's needs, but there is desire for a dome that could host games during the winter months
- The finance chair thinks more dome-based facilities are needed in the area than hard-court facilities
- Amenities desired at a proposed facility would be 2-3 batting cages, 3-4 pitching lanes, locker rooms, good restrooms, pitching mats, and catching and hitting mats; it also would be nice to see some additional training equipment for strength, speed and agility training
- There is a need for sports performance training
- Adult softball used to be very popular in the market, but youth sports have become the priority for many adults in the market

BASKETBALL

D1 Minnesota

- The club would travel to North Mankato for tournaments, but only if the club were running the event

Mankato Basketball Association

- There are between 270 and 305 players in the club, ages 9-14. About 66% are boys and 33% are girls
- Cost per player is \$250 per year
- This is a competitive program
- Other clubs in the market are St. Peters, Waseca, La Sueur and Lake Crystal. AAU clubs are Minnesota Rise and Minnesota Ice

- Season is October-March; AAU season is April-July
- The YMCA offers a recreational basketball program targeted for kids in grades K-6
- The club has no affiliation with a program such as AAU or USA Basketball
- Teams train at local schools in Mankato and occasionally utilize the recreation center in Lake Crystal. They utilize 8-12 courts from end of October to early March for 75 hours per week for all courts and pay \$7.50 per hour per court on weekdays and \$25 per hour per court on weekends
- Teams do not participate in leagues, only tournaments
- Teams participate in 5-9 tournaments per year. Entry fees are \$175-\$350 per team for 3 games guaranteed. Events are non-sanctioned, and teams travel within a 2-hour driving distance
- What would it take to move training regimens to a proposed facility? Availability and cost
- Availability of indoor space in the market is limited
- The president does believe there is a need for an additional indoor sports facility in the market for the sport, because several groups are competing for gym space for such sports as soccer, volleyball and pickleball
- Courts are available in the market at schools, colleges and the YMCA
- Ideal configuration of a new facility to maximize participation would be:
 - Field/Court Size: 3-4 high school regulation basketball courts
 - Preferred Flooring: Wood or Sport Court
 - Unacceptable Size and Flooring: Anything less than above and, in terms of flooring, tile or cement
 - Other Amenities Desired: Locker rooms, bathrooms, concessions and a scoreboard
- Indoor activities the organization would likely participate in at a new facility:
 - Leagues: Yes, 15-20 teams
 - Rentals: Yes, 6-20 hours per week from late October to early March; the club would have funds to rent the facility
 - Camps/Clinics: Yes, 150 players; club would promote the activities
 - Tournaments: Yes, 15-20 teams; club would like to host them
- The club does host a tournament utilizing 7 courts at Mankato State University, paying \$25 per hour per court
- Participation in adult basketball has decreased over the past 10 years. Adult leagues are held at the YMCA and Mankato Community Recreation Center
- The president believes there is a need for sports performance training in the market; about 25% of players would utilize the service
- The club would have a need for meeting space , a small office space and equipment storage at a proposed facility
- Impression of a proposed facility in the market is positive

- The club would consider a contractual arrangement to guarantee space and reduce the hourly cost of activities
- The president is not aware of any other indoor developments in the market
- Other sports that would impact usage of a new facility = soccer, softball/baseball, lacrosse and volleyball

Minnesota Rise

- The club is affiliated with AAU and Grassroots
- Tournament season is April-July, with the bulk of tournaments in April and May
- The club rents high school gyms for training/practices, but schools have first priority
- The club pays \$10-\$15 per hour per court
- The club does not need office space
- There are 20 teams in the club, which also hosts a multiple 3-on-3 leagues. The summer 3-on-3 league has about 50 teams; the fall league has 100+ teams
- The club is interested in starting up a spring tournament
- The coach also holds individual workout sessions and is looking for places to rent for those activities
- Teams would travel to the Mankato market for events
- The owner does believe there is a need for an additional indoor sports facility in the market for the sport, because of the lack of indoor gym space
- Ideal configuration of a new facility to maximize participation from the sport:
 - Field/Court Size: 3 high school regulation basketball courts
 - Other Amenities Desired: Scoreboards
- Indoor activities that the organization would likely participate in at a new facility:
 - Leagues: No, only participate in tournaments
 - Rentals: Yes, 30-50 hours per week from April-July and 10-15 hours per week from June-July
 - Camps/Clinics: Yes, 30 players; club would promote the activities
 - Tournaments: Club would be interested in hosting one tournament per year
- The club would consider a contractual arrangement to guarantee space and reduce the hourly cost of activities
- The owner thinks regional/local basketball teams would travel to the area for tournaments

Minnesota Heat Basketball

- The club would possibly travel to North Mankato for tournaments

Minnesota Comets

- The club is located about two hours and fifteen minutes from Mankato

- The director can't commit to his club participating in events in North Mankato, simply because of the distance

St. Peter Youth Basketball Association

- There are 10-12 teams (100-150 participants)
- Hard courts available in the market are at schools and St. Peter Community Center
- Impression of a proposed facility in the market is positive. The vice president believes there is a need for recreation facilities, and the proposed facility would be a great asset to the Greater Mankato area
- Availability of indoor space in the market is extremely low, and there are many organizations wanting indoor space
- Basketball season is September to May
- Teams train and utilize school gyms for free; however, there is talk about charging a fee in the near future
- The association does need more indoor space and available times for teams to practice and play
- The vice president believes there is a need for an additional indoor sports facility in the market for the sport
- Amenities desired at a proposed facility would be 6 regulation size basketball courts, racquetball courts, a weight room and indoor golf facilities
- Indoor activities the organization would likely participate in at a new facility are:
 - Leagues: Yes, 10-12 teams
 - Rentals: Yes, from September to April
 - Camps/Clinics: Yes, 120 players
 - Tournaments: Yes, 10-12 teams
- The club would consider a contractual arrangement to guarantee space and reduce the hourly cost of activities, but only if the gym space in St. Peter does not improve
- Believes there is need for sports performance training in the market
- Adult basketball is popular in the market

Waseca Basketball Association

- There are 5 boys' and 5 girls' teams, from grades K-8
- Cost per player is \$20 to \$100 per year
- Season is November to early April
- The club does not have an affiliation with organizations such as AAU
- Teams train at local schools, utilizing 3-4 gyms from November to early April for 10-12 hours per week and pay \$2 per hour per court
- Teams do not participate in indoor basketball leagues

- Teams participate in 3-7 tournaments per year. Entry fees are \$200 per team with 3-games guaranteed. Events are non-sanctioned, and teams travel within a 1-hour driving distance
- Availability of indoor space in the market is limited
- The president does believe there is a need for an additional indoor sports facility in the market for the sport because of the lack of indoor space
- Ideal configuration of a new facility to maximize participation from the sport is:
 - Field/Court Size: 2 high school regulation basketball courts
 - Preferred Flooring: Wood
 - Unacceptable Size and Flooring: Anything less than above and, in terms of flooring, concrete
 - Other Amenities Desired: Turf
- Indoor activities that the organization would likely participate in at a new facility:
 - Leagues: Yes, 5 teams
 - Rentals: Possibly, but travel to Mankato might be an issue
 - Camps/Clinics: Yes, 30 players; club would promote the activities
 - Tournaments: Yes, 10 teams
- Adult basketball participation is minimal in the market. Adult leagues are held at community and recreation centers.
- The president does believe there is a need for sports performance training in the market
- Impression of a proposed facility in the market is positive
- The president said that teams would travel to North Mankato for tournaments and leagues
- Other sports that would impact the usage of a new facility = soccer

SOCCER

Mankato United Soccer Club

- There are 34 competitive teams in the club from U9-U19, plus 500 recreational players
- Fee for recreational players is \$75 per season; fee for competitive players is \$450 per year
- Fall season is August-October; spring season is May-July
- Other clubs in the market are Le Sueur, Lake Crystal, St. Peter, Fairmont and New Ulm
- Member of Minnesota Youth Soccer Association
- Geographic reach of players is Mankato
- Teams used to train at the Armory but don't anymore, because it no longer has turf
- Teams train at local schools (3 gyms) for 100 total hours in January and February and pay \$5 per hour per court

- About 2-3 teams participate in indoor soccer leagues at Soccer Blast in the Twin Cities
- Availability of indoor space in the market is limited
- What would it take to move training regimens to a proposed facility? Decent cost and desired time slots
- The president does believe there is a need for an additional indoor sports facility in the market for the sport, because facility space and size is limited in the area
- Ideal configuration of a new facility to maximize participation from the sport:
 - Field/Court Size: Two regulation futsal size courts
 - Preferred Flooring: Futsal surface
 - Other Amenities Desired: Concessions
- Indoor activities that the organization would likely participate in at a new facility:
 - Rentals: Yes, 6 hours per week from December to mid-March; club would have funds to rent the facility
 - Camps/Clinics: Club might hold camps when the Mankato State University field opens but would consider a futsal camp at the proposed facility
 - Futsal Leagues: Yes, 10-12 teams
 - Futsal Tournaments: Yes, 10-12 teams
- There were no futsal leagues offered in 2018
- The president does believe North Mankato is a regional draw for futsal tournaments and that teams would travel to the area
- Adult soccer is an untapped market, according to the president. There is a local summer adult soccer league called La Liga Rosa with eight teams that plays at Lake Crystal
- The director does believe there is a need for sports performance training in the market; about 12-15 players would participate. One similar service currently operates in the market
- The club does not have a need for office space
- Impression of a proposed facility in the market = positive
- The club would consider a contractual arrangement to guarantee space and reduce the hourly cost of activities
- Other sports that would impact the usage of a new facility = lacrosse, baseball, football and rugby
- The president did indicate the club might offer a futsal league at the new indoor facility/dome at Mankato State University once it opens in late 2019
- The president did indicate a need for an outdoor turf field; club would help pay for capital costs and operational expenses, he said
- A new women's pro team will play under the club umbrella

Minnesota Youth Soccer Association

- There are 52,000 youth players in the state association, with about 70% of registered players coming from the Twin Cities
- There are about 8,000 adult members in the state, as part of the U.S. Adult Soccer Association
- Outdoor season is May to end of October; an Olympic Development Program (ODP) is held in May
- Indoor soccer is unregulated in the state
- The association utilizes indoor sports facilities to hold referee training, ODP training and coaches' education
- The association does not sanction or hold any futsal programming, but a few local affiliates in the Twin Cities run futsal programs
- Futsal is in its early stages of growth in the market
- The association would partner with a proposed facility to promote futsal and market to teams in the association
- The executive director believes there is a shortage of indoor space
- Ideal configuration of a new facility to maximize participation from the sport:
 - Field/Court Size: 1-3 futsal regulation size courts
 - Preferred Flooring: Hardwood
 - Unacceptable Size and Flooring: Anything less than above and, in terms of flooring, concrete
 - Other Amenities Desired: Restrooms and concessions
- Adult soccer is popular in the market
- Impression of a proposed facility in the market is positive

TENNIS & PICKLEBALL**Greater Mankato Community Tennis Association**

- There are 150 high school tennis players and 300-400 youth players in the market
- Outdoor adult tennis and juniors' programs are popular in the market
- Member of USTA
- Indoor season is October to April
- Impression of a proposed facility in the market is positive
- The association hosts youth and adult USTA tournaments from Levels 2-7. Events are held from June to August (3 youth events, 1 adult event, 6 mixers per year)
- An indoor tennis facility in Mankato closed in 2010
- There is an indoor tennis facility at Gustavus Adolphus College. Outside groups cannot rent the courts for training or programming, but they can rent the venue for tournaments. The facility is always busy, according to the president

- Quite a few members travel to the indoor facility at Gustavus Adolphus College during the winter season
- The president believes there is need for an additional indoor tennis facility
- The president believes there is a need for an indoor tennis facility with 7-8 courts and the following amenities: a viewing area, bathrooms and changing rooms
- Pickleball is also popular in the market and growing
- The association does have plans to build an indoor tennis facility. A donor verbally committed to donating land and that option is still on the table
- If an indoor tennis facility were built in the market, it would be used by the association year round
- The association currently charges \$20 to be a member, which includes a spot on mailing and emailing lists. With no indoor tennis facility, it's hard to justify the validity of a membership and donating to the association. Currently, the association keeps a steady list of 150 members
- With no indoor facility, instructors charge \$25-\$30 per hour. Typically, indoor facilities charge \$50-\$75, and the instructor keeps usually 40%-50%
- The association currently hosts 3 USTA youth tournaments in June and July and 6 adult events; it also hosts approximately 14 high school tournaments per year. Some of those events could be indoor tournaments if there were an indoor facility. The association could also host sectional, college, regional, league and other tournaments in an indoor facility. Tournaments participants usually pay \$60 per person
- No indoor tennis leagues are offered at Gustavus Adolphus or in Owatonna; not enough court space is available to allocate up to 6 courts for league play
- No adult tennis tournaments are offered in the area. The two USTA tournaments offered are restricted to players with a certain number of USTA points; as a result, very few Mankato-area players participate
- Indoor activities at a proposed new indoor tennis facility that the association likely would participate in:
 - Indoor Leagues: The proposed facility could have USTA 3.0, 3.5, 4.0, 4.5 gendered leagues. It can do 7.0, 7.5, 8.0, 8.5, 9.0 USTA mixed doubles leagues. The facility also could offer flex singles and doubles leagues there are not associated with USTA. Additionally, the association could run leagues for older adults, such as 60+, 70+ and 80+. Special youth days could be programmed, with Junior Team Tennis programs offered year-round. Other opportunities would a cardio tennis program, age-group lessons and designated nights for men and women
 - Court Rental: Weekdays from 3-10 p.m. could focus on youth and private adult instruction. Retired adults and others with flexible schedules could use the facility from 7 a.m. to 3 p.m. Most clubs have three days per week dedicated to older adults

- Camps/Clinics: An estimated 300-400 kids likely would participate in June and July camps
- Tournaments: When the association hosts a 2-day, level 6 tournament, an average of 80 kids participate. The association's tournaments have more participation than those in Rochester, because it can draw from south and southwest of Mankato. Junior team tournaments hosted by the association typically include an average of 150 kids

Mankato Area Pickleball Association

- There are 170 paid members in the association
- About 70% of those members are retired seniors
- The president has seen growth within the sport
- Players participate year-round, with the indoor season running from mid-September to April
- During the winter, the association plays at the YMCA and local school gyms
 - YMCA: Utilize 4 courts from 8-12 p.m. Monday through Friday and from 1-3 p.m. on Sunday; also from 6:30-9 p.m. on Tuesday and Friday. Participants must be YMCA members
 - School Gyms: Utilize the facilities for 6 hours per week, and each person pays \$30 per session (Fall – Oct to Dec and Winter – Jan to March)
- Availability of indoor space is limited
- The association hosts 1 tournament per year at the YMCA in April. In 2018, the event attracted 80 people; entry fees are \$25 per person
- The president believes there is a need for an additional indoor sports facility in the market for the sport, because there are no recreation centers in the area
- Ideal configuration of a new facility to maximize participation from the sport:
 - Field/Court Size: 6-9 regulation-size pickleball courts
 - Preferred Flooring: Wood or Sport Court
- The association would be interested in utilizing a proposed facility and would prefer a pay-as-you-play model. It would likely utilize the facility from mid-September to April, every Monday through Friday from 8:30 to 11 a.m.
- The association would be interested in hosting a tournament at the proposed facility
- The association would consider a contractual arrangement to guarantee space and reduce the hourly cost of activities

VOLLEYBALL**ARJO**

- The club would travel to North Mankato for tournaments and other events

Apple Valley Volleyball

- Currently the club is not set up to participate in tournaments located outside of the southern Minneapolis/St. Paul area, but the commissioner said he certainly would consider participating in a tournament in North Mankato because of the short travel distance

Belle Plaine Juniors

- The club would travel to North Mankato to compete in tournaments
- The Taylor Center at Mankato State University is the only quality volleyball facility south of Bloomington, and the club uses multiple gyms for their tournaments; only a certain number of teams can compete because of space limitations.
- Mankato is the same distance as some of the other cities to which the club travels for tournaments, and with less traffic. A new facility in North Mankato also would provide an opportunity to compete against teams in southern Minnesota.

Minnesota Attack Volleyball

- There are 16 teams in the club, ages 10-18
- Season is November to March
- Member of the Junior Volleyball Association (JVA)
- Teams train at facilities operated by the Mankato School District, as well as the St. Peter Community Center, Mankato State University and other recreation centers. They utilize about 8-10 volleyball courts for 12 hours per week from November-March. Rental fees range from \$30 to \$100 per hour per basketball court
- Availability of indoor space in the market is limited
- Teams participate in 7 tournaments per year. Entry fees for 1-day is \$110 per team and \$590-\$700 per team for 2-day events. Events are sanctioned by USA Volleyball and JVA. Teams travel from between 90 minutes and three-and-a-half hours away
- The director does believe there is a need for an additional indoor sports facility in the market for the sport, because of the lack of indoor space, which forces the club to cut players
- Ideal configuration of a new facility to maximize participation from the sport :
 - Field/Court Size: 4 regulation-size volleyball courts
 - Preferred Flooring: Wood or Sport Court

- Other Amenities Desired: Concessions and spectator seating
- Indoor activities that the organization would likely participate in at a new facility:
 - Leagues: Yes, 14 teams, and the club would be interested in running the league
 - Rentals: Yes, November-May for 12 hours per week
 - Camps/Clinics: Yes, 70 kids, and the club would be interested in running the activities
 - Tournaments: Yes, 16 teams, and the club would be interested in running the activities
- The club would consider a contractual arrangement to guarantee space and reduce the hourly cost of activities
- The director believes there is a need for sports performance training in the market; about 16 teams would utilize the service
- Impression of a proposed facility in the market = positive
- Adult volleyball is popular in the market, with leagues hosted by parks and recreation departments
- Other sports that would impact the usage of a proposed facility = basketball, soccer and lacrosse

USA Volleyball - North Country Region

- There are 19,000 youth and 1,000 adults registered with the region, with a large percentage coming from the Twin Cities area
- Season is October to mid-June
- The region runs officials' training, coaches' clinics and other events, and it would be interested in utilizing a proposed facility for these trainings/clinics
- The region would be interested in partnering with the proposed facility and running tournaments there
- Impression of a proposed facility in the market = positive
- Ideal configuration of a new facility to maximize participation from the sport
 - Field/Court Size: 3-12 regulation-size volleyball courts
 - Preferred Flooring: Taraflex
 - Other Amenities Desired: Concessions, high ceiling, parking and restrooms
- Adult volleyball is popular in the market
- Some indoor leagues are regulated by the region, while others are not
- Entry fees for 1-day tournament range from \$60-\$100 per team; for 2-day events, they are \$275-\$400 per team
- Facilities can host tournaments without any affiliation to a club team provided a representative from the facility is a member of the region

- Sand volleyball is popular, but very few participants are registered with the region
- The executive director believes sand courts should be part of the proposed facility's plans

OTHER

Bethany Lutheran College

- The college's athletics programs need additional indoor sports space
- The college is looking at building an indoor turf and indoor 200-meter track facility/fieldhouse with an outdoor turf field. As of now, the college is waiting on final renderings and would need to present the plan to the board of trustees for approval — as well as secure funding for the project. If the plan falls through, the department would consider adding a dome to its outdoor turf field
- The college rents its indoor court; fees range from \$100-\$150 per 3-hour time block. The director did indicate some rentals are for free for youth groups
- The director believes there is greater need for an indoor turf venue and not more court venues
- College sports teams most in need of indoor space = baseball, softball, tennis, and soccer
- The director stated that an indoor tennis facility closed years ago
- The director indicated the college does not need to utilize a proposed facility if its own project proceeds
- If there were indoor tennis in the proposed facility, the college would utilize the facility for its tennis team for 15 hours per week from late January through March
- The tennis team currently uses indoor courts at Gustavus Adolphus College
- The director would consider a contractual arrangement to guarantee space and reduce the hourly cost of activities
- Impression of a proposed facility in the market = positive
- The director stated that Mankato State University is looking to build an indoor fieldhouse, and he also has heard that the Mankato Tennis Association was (as of about two years ago) considering an indoor tennis facility
- The director believes there is a need for an additional indoor sports facility in the market, because of the lack of indoor space

Mankato Family YMCA

- The Y does have need for more indoor recreational space (hard courts), however the executive director did state that the Y is looking to build a new facility on Mankato's east side
- At this point, the Y has completed a market research and community needs assessment and hopes to begin a capital campaign in November 2019 (if the

financial pro forma comes back positive). The Y is looking to add some of the following elements in the new building:

- Indoor tennis courts
- Childcare center
- Four basketball courts
- Twelve-lane indoor pool
- The Y offers the following youth sports programs:
 - Basketball – Winter
 - Soccer – Spring and fall
 - T-Ball – Spring and fall
 - Flag Football – Spring and fall
 - Each program runs for 7 or 8 weeks
 - On average, there are 120 participants in the youth sports programs
- The fall soccer program is an indoor program
- The Y rents it space to non-members or special events, but that seldom occurs because the space is consistently occupied by YMCA programs
- Sports most in need of indoor space = baseball, softball and soccer
- The executive director is aware that Mankato State University is adding a dome for turf and Bethany Lutheran College is adding a field house
- Indoor hard-court facilities available in the market are at the YMCA and colleges/universities
- The executive director does believe there is a need for an additional indoor sports facility in the market to host tournaments, but he doesn't believe an indoor facility can support itself if it were used only as a practice facility
- The Y would consider further discussions of a partnership for joint use arrangements to utilize space *only if the Y does not open its own new facility*

Mankato Family YMCA

- The Y would have needs for additional indoor recreation programming space
- Youth sports programs that the Y offers:
 - Soccer: February-March = 100 kids
 - Basketball: January-February = 250 kids
 - T-ball and flag football programs are held outdoors
- Adult sports leagues that the Y offers:
 - Basketball: November-February = 8 teams (participation in adult basketball has been declining for the past 10 years)
 - Pickleball: 60-80 people
- The Y offers 12-18 mini-sports programs per year; 15 kids per five-week session
- The youth sports programs are aimed at youth from grades pre-K to 4. Each youth sports program is 8 weeks long

- There is a waiting list for program, because of lack of space
- There are 10,000 members, and the Y is financially strong
- The Y rents out its gyms to non-members for \$50 per hour per court
- Outdoor sports/groups that would have needs for additional indoor sports space beyond those available = soccer, basketball, flag football, softball and baseball
- The director was aware that Mankato State University and Bethany Lutheran College have plans to develop indoor facilities
- Courts available in the market are at the YMCA and schools
- The Y would consider an arrangement with a proposed facility for programming purposes and would utilize the space from October-April for 10-15 hours per week (and possibly in the summer months). The sports director is not sure if the Y would have funds to rent a facility; the CEO would make that decision
- The Y services the Mankato and North Mankato markets
- Impression of a proposed facility in the market = positive
- The director believes there is a need for an additional indoor sports facility in the market, because the area is a strong and consistent sports market

Mankato Area Public Schools - Mankato West

- Varsity teams would have needs for additional indoor space for courts, turf, aquatics and ice = swimming, basketball, volleyball, football and soccer
- The school rents its courts, but the details are handled by the Community Recreation Department
- The school district has no plans to develop additional indoor facilities
- Sports groups or organizations with indoor sports facility needs beyond what is available = basketball, volleyball, soccer, lacrosse, baseball and softball
- The director did hear about the potential of a community recreation center to be built in St. Peter; he also mentioned that Mankato State University is developing an indoor fieldhouse, and the YMCA is looking to build a new facility on the east side of the city
- Courts available in the market are at schools
- Availability of indoor space in the market is tight
- The director believes there is a need for an additional indoor sports facility in the market, because of the lack of indoor space
- The athletic department/school would be interested in renting the following:
 - Courts: In September-October and from November-February for about 15 hours per week
 - The school would have funds to rent the proposed facility
- Impression of a proposed facility in the market = positive
- The school would be interested in a contractual arrangement to guarantee space and reduce the hourly cost of activities
- The school/teams would be able to travel to a proposed facility

Minnesota State University, Mankato

- The university will be opening a turf dome facility in October 2019. The dome will be used in the winter and be removed in the spring/summer for use as an outdoor field
- The needs of the university's varsity, club and intramurals teams are being met
- The university rents out its hard-court venues to outside groups based on availability
- The university will provide community access to the new turf facility; fees will be \$450 for the full field and \$150 for 1/3 field
- The director said the university would need to generate \$300,000 each year in rentals for the new turf dome facility
- The university does not have any plans to develop additional indoor recreational/sports facilities at this time
- Sports in the community most in need of indoor space = basketball, volleyball, pickleball and soccer
- The director is aware that the YMCA is looking to expand and build a new facility
- Hard-court venues in the market are at schools, universities/colleges and the YMCA
- The director also sits on the board of the Sports Commission and did state that there is money available for the development of sports facilities through the local option sales tax
- The university does not have indoor tennis facilities, but the tennis team does rent the indoor facility at Gustavus Adolphus College in St. Peter
- The director believes there is a need for an additional indoor sports facility in the market

Visit Mankato

- There are 15 hotels in the market
- The Sports Commission estimates \$17.2 million in economic impact
- Average overnight visitor spending is \$165-\$175 per day
- The Sports Commission is becoming more active in trying to bring more sporting events to the market
- The busy season for conventions is fall/winter with summer being the slowest season
- The commission would help promote a proposed facility and assist with group sales efforts, but it would need to re-establish a relationship with the City of Mankato
- The commission supports local sports such as adult and youth volleyball, baseball and softball, BMX, basketball, mountain biking and gymnastics
- All three see a need for more basketball courts and tennis courts

Exhibit II: Existing Facility Competition

North Mankato, MN

Facilities are evaluated according to several criteria, including:

Functional Planning:	Design:	Site:
<ul style="list-style-type: none">• Plan and/or facility efficiency• The facility entry• The indoor facility circulation/traffic flow and;• Use of space	<ul style="list-style-type: none">• Interior finishes• Detailing and color schemes• Use of natural and artificial lighting and;• Building materials/structure	<ul style="list-style-type: none">• Location of the sports complex/facility• Ease of access to the facility site/location and;• Safety of the facility and the parking lot



Name	Mankato Armory - Minnesota National Guard
Address	100 Martin Luther King Jr. Drive, Mankato, MN
Website	

Focus Criteria	Below Average/No	Average	Above Average/Yes
Exterior Facility Signage			X
Ample Parking Lots			X
What is the image portrayed by the facility			X
Parking Lot Lighting			X
Member Service Desk	X		
Staff person assigned at the front desk and was greeted	X		
Cleanliness of the facility			X
Interior lighting of the facility		X	
Surface of the sports venue	X		
Marketing material available on programming	X		
Facility is situated in a good area in terms of safety and ease of access			X
Is the facility easy to find and / or enter the site		X	
Quality of Website	X		
Offer on-line registration for programs	X		
Spectator seating around the field(s)/hard court(s)	X		
Hours of Operation posted in the facility	X		
Marketing Partners surrounding the facility	X		
Climate Controlled			X



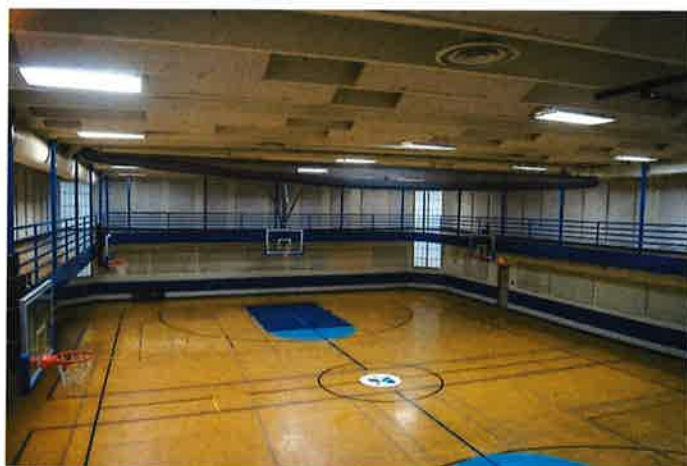
Name	Minnesota State University, Mankato (Myers Field House)
Address	118 Myers Field House, Mankato, MN
Website	https://www.mnsu.edu/campusrec/facilities/myers.html

Focus Criteria	Below Average/No	Average	Above Average/Yes
Exterior Facility Signage			X
Ample Parking Lots			X
What is the image portrayed by the facility			X
Parking Lot Lighting			X
Member Service Desk	X		
Staff person assigned at the front desk and was greeted	X		
Cleanliness of the facility			X
Interior lighting of the facility			X
Surface of the sports venue	X		
Marketing material available on programming	X		
Facility is situated in a good area in terms of safety and ease of access			X
Is the facility easy to find and / or enter the site			X
Quality of Website			X
Offer on-line registration for programs	X		
Spectator seating around the field(s)/hard court(s)			X
Hours of Operation posted in the facility			X
Marketing Partners surrounding the facility	X		
Climate Controlled			X



Name	Mankato Family YMCA
Address	1401 S Riverfront Drive, Mankato, MN
Website	https://mankatoymca.org

Focus Criteria	Below Average/No	Average	Above Average/Yes
Exterior Facility Signage			x
Ample Parking Lots			x
What is the image portrayed by the facility			x
Parking Lot Lighting			x
Member Service Desk			x
Staff person assigned at the front desk and was greeted			x
Cleanliness of the facility			x
Interior lighting of the facility			x
Surface of the sports venue		x	
Marketing material available on programming			x
Facility is situated in a good area in terms of safety and ease of access			x
Is the facility easy to find and / or enter the site			x
Quality of Website			x
Offer on-line registration for programs			x
Spectator seating around the field(s)/hard court(s)	x		
Hours of Operation posted in the facility			x
Marketing Partners surrounding the facility	x		
Climate Controlled			x



Local Competition

Name	Bethany Lutheran College
Address	700 Luther Drive, Mankato, MN
Website	https://www.blc.edu
Venues	2 basketball/volleyball courts, elevated track



Name	Ignition Fitness
Address	1960 Commerce Drive North Mankato, MN
Website	http://www.ignitionmankato.com/
Venues	1 turf field and batting cages



Name	Lake Crystal Recreation Center
Address	621 W Nathan St., Lake Crystal, MN
Website	www.lcarc.com
Venues	1 basketball/volleyball court

Local Competition

Name	Minnesota State University, Mankato - Bresnan Arena / Otto Recreation Center / Schellberg Gym
Address	Mankato, MN
Website	https://www.mnsu.edu/campusrec/facilities/
Venues	6 basketball courts and 8 volleyball courts



Name	Minnesota State University, Mankato - Myers Field House
Address	Mankato, MN
Website	https://www.mnsu.edu/campusrec/facilities/
Venues	8-lane 200-meter indoor track with 4 basketball/volleyball/ tennis/badminton courts



Name	Mankato Area Public Schools
Address	10 Civic Center Plaza, Mankato, MN
Website	www.isd77.org
Venues	4 basketball courts / 5 volleyball courts

North Mankato, MN
Facility Analysis Summary

Facility Name	# of Fields/Courts	Field/Court Dimensions	Mezzanine Viewing	Air Cond.	Heating	Locker Rooms	Retail	Alcohol	Food Service	Rental Rates
Mankato Armory - Minnesota National Guard	1 Turf Field	113x78 ft.	No	Yes	Yes	No	No	No	No	\$50 per hour
Minnesota State University, Mankato (Myers Field House)	4 Volleyball Courts 4 Basketball Courts 1 Batting Cage 1 Indoor Track	Volleyball – 30'x 60' H.S. Basketball – 94' X 50' Batting Cage – 60 ft. 200-meter track	No	Yes	Yes	Yes	No	No	Yes	-
Mankato Family YMCA	2 Volleyball Courts 3 Basketball Courts	Volleyball – 30'x 60' H.S. Basketball – 94' X 50'	No	Yes	Yes	Yes	No	No	No	\$50 per hour

North Mankato, MN

