

RECORD OF PROCEEDINGS

Held

January 9, 2023

CALL TO ORDER

Mayor Fox called the Monday, January 9, 2023 Regular Meeting of Dublin City Council to order at 5:15 p.m.

ROLL CALL

Present were Ms. Amorose Groomes, Vice Mayor De Rosa, Mayor Fox, Mr. Keeler, Ms. Kramb and Mr. Reiner. Ms. Alutto arrived after the start of the executive session.

Staff members present were Ms. O’Callaghan, Ms. Readler, Mr. Stiffler, Mr. Ranc, Mr. Rogers, Mr. Gable, Mr. Farrar, Ms. LeRoy, Ms. Willis, Ms. Weisenauer, Mr. Hammersmith, Mr. Earman, Ms. Rauch, Chief Paez, Ms. Goliver, Ms. Blake, and Mr. Ament.

Also present were: Mr. Scott Dring, Visit Dublin Ohio; Mr. Scott Hunden, President and CEO and Mr. Ryan Sheridan, Project Manager, from Hunden Strategic Partners; and Mr. David Greusel, Convergence Design. Natascha Halley and Dan Gutierrez, Swagit joined virtually.

ADJOURN TO EXECUTIVE SESSION

Mayor Fox moved to adjourn to executive session:

- Considering the Employment of a Public Employee.

Ms. Amorose Groomes seconded.

Vote on the motion: Mr. Keeler, yes; Ms. Kramb, yes; Mr. Reiner, yes; Vice Mayor De Rosa, yes; Mayor Fox, yes; Ms. Amorose Groomes, yes.

PLEDGE OF ALLEGIANCE

Mayor Fox invited Vice Mayor De Rosa to lead the Pledge of Allegiance.

SPECIAL PRESENTATIONS

There were no special presentations.

CITIZEN COMMENTS

Diane Cartolano, 3390 Martin Road, came forward to discuss the development in Dublin. She expressed concern for development in the area of her neighborhood. She has lived in Dublin for 25 years and loves living here. She felt compelled to speak about the pace and volume of the development going on around Martin Drive and Lily Mar Court. She shared that if additional development and traffic is added to an already congested area, that it will become worse and more dangerous. She referred to Ms. O’Callaghan’s letter in Dublin magazine and stated she was happy to read that the City puts residents first. She used to use her front porch as a place to relax and peacefully enjoy her coffee. She has not used her porch in two years because of the traffic and congestion. She is concerned about development that adds more people in the area. She is concerned about City resources. She referenced the five principles in the report that was with Ms. O’Callaghan’s letter in Dubin magazine. She encouraged Council Members to come to her neighborhood and walk around the roundabout before making decisions. She asked Council to make decisions as though this was their home. She would welcome additional green space rather than the larger development.

CONSENT AGENDA

- Minutes of the December 5, 2022 Regular Council meeting
- Notice to Legislative Authority of a Change in Stock Ownership of Vrable VI, Inc., dba Digger & Finch, 2nd & 3rd Fls & Patio, 4500 John Shields Parkway, Dublin, Ohio 43017

There was no request to remove a consent agenda item.

Ms. Alutto moved to approve the consent agenda.

Mr. Reiner seconded.



RECORD OF PROCEEDINGS

Held

January 9, 2023

Page 2 of 13

Vote on the motion: Mr. Reiner, yes; Mayor Fox, yes; Vice Mayor De Rosa, yes; Mr. Keeler, yes; Ms. Kramb, yes; Ms. Alutto, yes; Ms. Amorose Groomes, yes.

**SECOND READING/PUBLIC HEARING – ORDINANCES**

Mayor Fox moved to waive the Council Rules of Order and read Ordinances 71-22 through 73-22 together.  
Ms. Alutto seconded.

Vote on the motion: Ms. Amorose Groomes, yes; Mr. Keeler, yes; Vice Mayor De Rosa, yes; Ms. Kramb, yes; Mr. Reiner, yes; Ms. Alutto, yes; Mayor Fox, yes.

The Clerk read the titles into the record.

**Ordinance 71-22**  
**Authorizing the City Manager to Execute and Accept Necessary Conveyance Documents and Contracts to Acquire an Easement from the Property Located on Franklin Street, Identified as Franklin County Parcel Number 273-000130 from Arfan Midani, for the Public Purpose of Carrying out the South High Street Utility Burial Project 19-030-CIP**

**Ordinance 72-22**  
**Authorizing the City Manager to Execute and Accept Necessary Conveyance Documents and Contracts to Acquire an Easement from the Property Located on Franklin Street, Identified as Franklin County Parcel Number 273-000124 from Dublin Community Church, for the Public Purpose of Carrying out the South High Street Utility Burial Project 19-030-CIP**

**Ordinance 73-22**  
**Authorizing the City Manager to Execute and Accept Necessary Conveyance Documents and Contracts to Acquire an Easement from the Property Located on Franklin Street, Identified as Franklin County Parcel Number 273-000034 from U Crew Holdings LLC, for the Public Purpose of Carrying out the South High Street Utility Burial Project 19-030-CIP**  
Mr. Gable stated that he provided additional information regarding Ordinance 73-22 to answer Council’s questions from first reading. He stated there were no other changes to these Ordinances from first reading. Staff recommended approval.

There were no public comments.

Ms. Amorose Groomes thanked staff for the additional information.

Vote on the Ordinances: Ms. Alutto, yes; Ms. Kramb, yes; Ms. Amorose Groomes, yes; Mayor Fox, yes; Vice Mayor De Rosa, yes; Mr. Keeler, yes; Mr. Reiner, yes.

**Ordinance 74-22**  
**Authorizing the City Manager to Execute and Accept Necessary Conveyance Documents and Contracts to Acquire an Easement from the Property Located on West Bridge Street, Identified as Franklin County Parcel Number 273-000001, from the Dublin City School District Board of Education and Enter into a Construction Agreement with the Dublin City School District Board of Education and the Ohio Power Company for the Public Purpose of completing the Franklin Street Extension Project 21-012-CIP**  
Mr. Hammersmith stated that there have been no changes to this Ordinance from the first reading. He mentioned that there is a corresponding Resolution on tonight’s agenda which is Resolution 04-23. Staff recommended approval.

There were no public comments.



RECORD OF PROCEEDINGS

Held

January 9, 2023

Page 3 of 13

Vote on the Ordinance: Vice Mayor De Rosa, yes; Ms. Kramb, yes; Mr. Keeler, yes; Ms. Alutto, yes; Mr. Reiner, yes; Mayor Fox, yes; Ms. Amorose Groomes, yes.

**INTRODUCTION/FIRST READING/PUBLIC HEARING - ORDINANCES**

**Ordinance 01-23**

**An Ordinance to Appropriate Franklin County Parcel Number 273-009086-00 from Vivo Living Dublin LLC, for the Public Purpose of Constructing a Bridge Crossing over I-270, which shall be Open to the Public without Charge**

Ms. Alutto introduced the Ordinance.

Ms. O’Callaghan stated that adoption of Resolution 53-22 began the appropriation process for this parcel. This Ordinance authorizes the City Law Director’s office to file a petition for appropriation in the county Court of Common Pleas should it become necessary. The property located at 4130 Tuller Road has been identified as a key parcel for the recommended bridge alignment in the Bridge Alternatives and Location Study. This project was first identified and included as a recommendation for further development during the Sawmill Road Corridor Study, completed in June 2019. The Bridge Alternatives and Location Study for this project, completed in May 2022, investigated the feasibility of different crossing locations, various pedestrian and bicycle facilities, and types of bridges and intersections. The study concluded the best location for a new I-270 crossing returns Village Parkway to its previous alignment and extends north to Emerald Parkway. In order to keep this project on schedule, it is necessary to begin the acquisition process now. The property located at 4130 Tuller Road has been identified as a key parcel for the recommended bridge alignment. Staff recommended adoption of this Ordinance at the second reading/public hearing on January 30, 2023.

There was one comment received regarding this legislation.

Bryan Griffith, 3852 Carberry Drive, Dublin, submitted the following message via the website:

*I am opposed to the city building a bridge over 270 from Tuller Road to Emerald Parkway. If you build it, they will come, and we don't need more cars in this corridor, where there are already two high volume roads a mere one-half mile apart, serving the same purpose. Saving car drivers an extra 2 minutes is not a valuable use of our tax dollars. I live north of 270, just off Emerald Parkway, and work south of 270, so I travel this corridor daily. There is no need for an additional bridge for cars. However, pedestrian/bicycle traffic could benefit from an improved safe route along Sawmill Road. I could understand a pedestrian bridge over 270, but it might be cheaper to improve the pedestrian infrastructure along Sawmill Road.  
Please vote no on Ordinance 01-23 until further study can be completed.*

Mr. Keeler stated that there are many travel options to navigate in and around Dublin. He stated that this would provide another alternative to travelling on Sawmill Road.

Ms. Amorose Groomes stated that this is not just about present traffic but it is about future traffic as well. Dublin has no control over the fast development happening in the southern half of Delaware County which is putting pressure on I-270. The intent of this bridge is that it would serve our community. She suggested circulating the studies that have been done and the lack of options for improvement so that it can be reviewed by the public.

Ms. O’Callaghan stated that there have been extensive studies and she would be happy to provide those for public information.

Ms. Kramb stated that Sawmill Road is not in our jurisdiction, but what we can do is provide an alternative to Sawmill that would be in our control.



RECORD OF PROCEEDINGS

Held

January 9, 2023

Page 4 of 13

Mayor Fox agreed and reiterated that staff is always looking at connectivity for pedestrians and bike users which is evidenced by our existing path system and infrastructure. She stated that this will continue into the future.

Mr. Reiner stated that Dublin, due to its early planning and infrastructure, is fortunate to have several ways to navigate the City. This particular project will provide one more alternative and is an important access road for emergency services as well.

Second reading/public hearing is scheduled for the January 30, 2023 Council meeting.

**INTRODUCTION/PUBLIC HEARING/VOTE – RESOLUTIONS**

**Resolution 01-23**

**Waiving Competitive Bidding as Being in the Best Interest of the City and Authorizing the City Manager to Accept Chuck's Septic Tank, Sewer & Drain Cleaning, Inc's (CST) Proposal for the Purpose of Installing the Telecommunication Conduits for the South High Street Utility Burial - Phase 1 Project (19-030-CIP)**

Ms. Alutto introduced the Resolution.

Mr. Hammersmith stated that the City will be relocating the existing overhead utility lines along South High Street through the South High Street Utility Burial - Phase 1 Project by installing underground electric (AEP Ohio) and telecommunication utilities (Spectrum, AT&T, Breezeline, and Dublink) to service the affected parcels. At the completion of the project, all overhead utility lines and poles along South High Street will be removed between West Bridge Street and Short Street. Council approved the Letter of Agreement (Resolution 66-22) with the Ohio Power Company (AEP Ohio) to remove all existing overhead electric facilities and install new underground electric facilities in the Phase 1 Project area. AEP will receive reimbursement from the City for the cost of their work. AEP's contractor will install all residential and commercial service laterals including telecommunication laterals. While each of the four telecommunications utilities and AEP could install their own conduits, impacts to the surrounding neighborhood and businesses would be substantially increased with five separate contractors performing burial work. The telecommunication conduits will be in close proximity to those being installed by AEP and will be generally parallel to the electric conduits. Staff recommends utilizing a single contractor for the electric and telecommunication conduit installation. CST specializes in directional boring and hydro-excavation, which is ideal for working in developed areas to minimize damage to property, including existing utilities and infrastructure, and provides an enhancement to public safety. The CST proposal estimated the total costs of their work at \$1,619,429.01, which is under the engineer's cost estimate of \$1,681,204.00. This proposal also includes the cost for all restoration associated with the Project, for both AEP and the telecommunication installations. Staff reiterated the recommendation that it is critical to have a single contractor perform the telecommunications conduit installations. As a result, it is necessary Council determine it to be in the best interest of the City for the public health, safety, and welfare of the City and the Downtown Historic District to waive competitive bidding for this proposed work. Staff recommended approval of the Resolution.

There were no public comments.

Mr. Keeler sought clarification on the work CST is doing for this project versus the telecommunication utility companies work (Resolutions 02-23 and 03-23). Mr. Hammersmith stated that the difference is that Resolutions 02-23 and 03-23 are for those companies to run the wire through the conduit that CST is installing.

Ms. Amorose Groomes asked if the (destructive) area of the work is mostly along Mill Lane. Mr. Hammersmith responded affirmately and stated that it was along Mill Lane, Sells Alley and Franklin Street. She stated the only evidence of work on South High Street will be the removal of the poles and lines. Mr. Hammersmith responded affirmatively. She asked if CST would be responsible for installing the above-ground mounting facilities. Mr. Hammersmith stated that they would. She inquired as to whether or not we can influence where they are placed. Mr. Hammersmith stated that staff has worked with all companies involved to make sure that these are placed so



RECORD OF PROCEEDINGS

Held

January 9, 2023

Page 5 of 13

they can be screened accordingly. Ms. Amorose Groomes confirmed that screening would be installed around these boxes. Mr. Hammersmith responded affirmatively.

Ms. Kramb asked if the landscaping was being sub-contracted out. Mr. Hammersmith stated that it likely would be. She confirmed that they would be responsible for the success of the plantings for the screening. Mr. Hammersmith confirmed that they would be responsible.

Vote on the Resolution: Ms. Kramb, yes; Ms. Amorose Groomes, yes; Mayor Fox, yes; Mr. Reiner, yes; Vice Mayor De Rosa, yes; Mr. Keeler, yes; Ms. Alutto, yes.

**Resolution 02-23**  
**Authorizing the City Manager to Enter into a Letter of Agreement with Cogeco US (OH), LLC dba Breezeline for the South High Street Utility Burial - Phase 1 Project (19-030-CIP)**

Ms. Alutto introduced the Resolution.  
Mr. Hammersmith stated that this letter of agreement with Breezeline will:

- Remove all existing overhead communication facilities and install new underground facilities in the Phase 1 project area;
- Allow Dubin to screen the above-ground electric facilities;
- Not plan any enhancements, but agree that any enhancements are their financial responsibility; and
- Dublin will reimburse Breezeline \$37,548.38 for the work.

Staff recommended approval.

There were no public comments.

Vote on the Resolution: Ms. Alutto, yes; Mr. Keeler, yes; Vice Mayor De Rosa, yes; Ms. Kramb, yes; Mr. Reiner, yes; Ms. Amorose Groomes, yes.

**Resolution 03-23**  
**Authorizing the City Manager to Enter into a Letter of Agreement with Ohio Bell Telephone Company dba AT&T for the South High Street Utility Burial - Phase 1 Project (19-030-CIP)**

Ms. Alutto introduced the Resolution.  
Mr. Hammersmith stated that this Resolution is for a letter of agreement with AT&T that is in similar fashion to the previous Resolution for Breezeline. This letter of agreement will:

- Remove all existing overhead communication facilities and install new underground facilities in the Phase 1 project area;
- Allow Dubin to screen the above ground electric facilities;
- Reduce Dublin’s costs by \$54,592.76 as a credit for AT&T’s enhancements installed by Dublin’s conduit contractor;
- Agree that any system enhancements are their financial responsibility; and
- Dublin will reimburse AT&T \$113,056.89 for the work.

Staff recommended approval.

There were no public comments.

Mayor Fox stated that she is pleased to see this project happening and is appreciative of all of staff’s work.

Vote on the Resolution: Mayor Fox, yes; Ms. Kramb, yes; Ms. Alutto, yes; Mr. Reiner, yes; Vice Mayor De Rosa, yes; Ms. Amorose Groomes, yes; Mr. Keeler, yes.

**Resolution 04-23**  
**Authorizing the City Manager to Enter into a Letter of Agreement with the Ohio Power Company (AEP Ohio) for the Franklin Street Extension Project (21-012-CIP)**

Ms. Alutto introduced the Resolution.



RECORD OF PROCEEDINGS

Held

January 9, 2023

Page 6 of 13

Mr. Gable stated that the Franklin Street Extension project will perform the following:

- Extend Franklin Street;
- Reconstruct Franklin Street;
- Install a traffic signal at Bridge Street and Franklin Street;
- Remove the pedestrian Signal at Bridge Street and Darby Street; and
- Bury overhead utility lines.

Mr. Gable reviewed the utility easements that have already been approved by Council (Ordinance 74-22 and 69-22). This letter of agreement will allow: AEP to remove all existing overhead electrical facilities and install new underground facilities in the project area; AEP to allow Dublin to screen the above-ground electric facilities and Dublin to reimburse AEP \$239,700.04 for the above work. Staff recommended approval of the Resolution.

Vote on the Resolution: Vice Mayor De Rosa, yes; Ms. Kramb, yes; Mr. Keeler, yes; Mr. Reiner, yes; Mayor Fox, yes; Ms. Amorose Groomes, yes; Ms. Alutto, yes.

**Resolution 05-23**  
**Declaration of Friendship and Cooperation between the City of Dublin, Ireland and the City of Dublin, Ohio, USA**

Ms. Alutto introduced the Resolution.  
Ms. LeRoy stated that in 2017, Dublin, Ohio officially signed a Friendship City Agreement with Dublin, Ireland at the 30<sup>th</sup> Anniversary of the Dublin Irish Festival for a four-year term. Areas of cooperation outlined were Economy, Culture, Sports, Education, Youth and Smart City to promote common prosperity and development. The agreement was signed during a visit by Lord Mayor Mícheál Mac Donncha to Dublin, Ohio. The previous Friendship City Agreement expired in August 2021. In August of 2022, Dublin, Ohio staff approached the City of Dublin, Ireland to renew the Friendship City Agreement. This request was formally approved by the Dublin, Ireland City Council on December 5, 2022. Once approved, a contingent from Dublin, Ohio will travel to Dublin, Ireland for a formal signing. Staff recommended approval of this Resoluton in furtherance of adopting another Friendship Agreement.

Mayor Fox thanked Lord Mayor Mícheál Mac Donncha and former Ambassador Daniel Mulhall for their kind support of renewing this agreement.

Vote on the Resolution: Mr. Reiner yes; Ms. Kramb, yes; Ms. Amorose Groomes, yes; Ms. Alutto, yes; Vice Mayor De Rosa, yes; Mr. Keeler, yes; Mayor Fox, yes.

**OTHER BUSINESS**

- Council Chamber Streaming and Video Production Services

Mr. Farrar provided an update to a recommendation given by staff in August 2022 regarding the streaming of public meetings. Staff reviewed the following options: remote-director streaming production services, in-person production companies and the possible addition of a full-time staff member to improve upon the technology we already have. Subsequent to the recommendation provided by staff in August 2022, Swagit reached back out to offer a more thorough analysis of their services and capabilities. Mr. Farrar introduced Natascha Halley and Dan Gutierrez from Swagit Productions LLC who joined the meeting virtually. Mr. Gutierrez provided a brief overview of some of the features that Swagit offers.

There were no public comments.

Mr. Reiner asked if there was a way to add slides or pictures to a presentation for a Council meeting. Mr. Gutierrez stated that there was a way to add slides or pictures and that could be done with the computers that are in the room.

Vice Mayor De Rosa asked about how remote participants would work using the Swagit solution. Mr. Gutierrez stated that the virtual feed would be displayed through the Swagit system using Webex.



RECORD OF PROCEEDINGS

Held

January 9, 2023

Page 7 of 13

Mr. Farrar stated that staff, with Swagit and New Era, took a comprehensive look at what equipment would integrate and what would need replaced. It was determined that only the cameras would need to be switched out to Swagit’s cameras.

Mayor Fox asked about the searchability of the meeting information. Mr. Gutierrez stated that it is called Sound Search and it will allow a keyword search to retrieve all agenda items on any meeting matching that keyword.  
Mr. Farrar also stated that the agenda items will be tagged as well so viewers watching the meeting after the fact can watch the specific topics they want to see.

Ms. Kramb asked if the recordings were then owned by Swagit. Mr. Gutierrez stated that the content lives on Swagit servers, but it is always owned by Dublin.

Mayor Fox moved to direct staff to draft legislation to waive competitive bidding.  
Ms. Alutto seconded.

Vote on the motion: Ms. Kramb, yes; Ms. Amorose Groomes, yes; Mr. Reiner, yes; Vice Mayor De Rosa, yes; Mr. Keeler, yes; Mayor Fox, yes; Ms. Alutto, yes.

Ms. O’Callaghan provided an introduction to the next two agenda items. She stated that staff has been working with Pros Consulting to complete an update to the Parks and Recreation Master Plan and as part of the process has completed surveys of the community, a community forum and stakeholder meetings. This information and report will be compiled to share with Council at their January 17 work session.  
She stated that Mr. Dring presented the results of the Sports Complex Feasibility Study to the Visit Dublin Board in December 2022. Visit Dublin hired Hunden Strategic Partners for the study and they sought input from the hospitality industry as well as the sports stakeholders. Mr. Dring shared the study with staff recently and staff is in the process of reviewing the findings of that study which is industry based to supplement the Pros Consulting Study which is resident based. The hope is to be able to meet the needs of the residents as well as visitors to Dublin. There were overlaps in the findings, but there are some distinct differences as well which can be attributed to the different focus between the studies.

- Sports Complex Feasibility Study

Mr. Dring expressed gratitude over the participation he received on this study process. He thanked staff for their time and input as well. He stated that there were four reasons why they are doing this study now, and they are:

- Creating a complex like this has been an aspirational goal as part of their strategic plan since 2010;
- We are losing business to our competitive set;
- Business travel will not come back to the level it was pre-COVID, so this is a way to fill that void; and
- The Parks and Recreation Master plan update and the City’s purchase of land around Darree Fields made this seem like the perfect time.

He introduced Mr. Rob Hunden, President and CEO and Mr. Ryan Sheridan, Project Manager, from Hunden Strategic Partners. Mr. David Greusel, Convergence Design, was also present. Mr. Hunden provided a brief introduction. Mr. Sheridan walked through the presentation (attached hereto an incorporated herein by reference as Exhibit A). The proposal with this study contains 8 multipurpose artificial turf fields (lighted), 14 grass fields, 5 softball diamonds and an indoor facility that would provide 9 basketball courts and 12 volleyball courts. The indoor facility would also have the ability to host graduations, concerts and other community events. Mr. Greusel provided the site plan for the proposal (Exhibit A). The site plan also welcomes additional development with restaurants and hotels. Mr. Sheridan shared the research that was completed where Darree Fields was compared to Berliner Sports Park in Columbus. The visitation data shows that less than 20% of Darree’s visitation comes from beyond 75 miles, where nearly 50% of Berliner’s comes from beyond 75 miles which encourages hotel stays. He shared information regarding tournament



RECORD OF PROCEEDINGS

Held

January 9, 2023

Page 8 of 13

opportunities. He discussed the funding model of these complexes by sharing information about the TBK Bank Sports Complex in Bettendorf, IA and a facility in Round Rock, TX. TBK was a \$50 million dollar complex owned by BettPlex LLC. Round Rock is owned by the City of Round Rock, TX. In 2008 Round Rock funded an \$18.2 million dollar renovation and expansion of Old Settlers Park. In 2017, Old Settlers Park underwent a 6-acre, \$27 million expansion that added the Round Rock Multipurpose Complex. Mr. Sheridan shared the proforma for the proposal. He stated that the 30-year summary of impacts shows \$27.9 million in income tax and \$12.7 million in hotel tax. The project cost estimates Phase 1 total is approximately \$66.3 million and Phase 2 costs are \$67 million for a total of \$133.3 million.

Hilary Loustaunau, 8333 Somerset Way, stated that she is a Board Member of the Dublin Community Swim Team and a parent of a Dublin Coffman Swimmer. She noted in the Table of Contents of the study that there was an aquatics section. She would like more information about the study of an aquatics facility in the future plan. She stated that all the Dublin swimming parents take their money to other communities every other weekend because Dublin has no aquatic facility. She stated that a 50 meter pool is needed in Dublin, but because there is not one, they have to travel to Marysville. She would like to hear more about the aquatics section of the proposal.

Mr. Hunden stated that he appreciates the passion exhibited by the parents and participants of their sport. Initially, the study was not to include any water (or ice), but because of the strong presence in the community of aquatic users, they did layer this issue into the study. He stated that it comes down to priorities and where you want to put public dollars. The types of fields and courts in this proposal are multi-purpose and can accommodate different sports and tournaments. Ice or aquatics are much more specific and much more of a specified use. The operational expenses are quite substantial so cost recovery is quite substantial.

Mr. Sheridan stated that aquatics was added into the scope after the project had started to ensure a comprehensive look at options. He stated that they did look at local supply and user group benefit. They interviewed local groups such as the Dublin Sea Dragons which is a large swimming organization in Dublin. There is a strong supply in the local and regional market. He stated they took a look at the trade offs between aquatics and what is proposed in the presentation and found this proposal to be much more of a multi-purpose use. This proposal has a much higher chance of sports tourism.

Mr. Keeler stated that he was not surprised by the proposal and presentation. It is important to understand that these types of facilities are open to the residents as well as tourism. He noted that there are many sports, in addition to swimming, that must to go other communities. He expressed support for the sport complex proposal.

Ms. Alutto asked about opportunities for sponsorships or public/private partnerships to offset the cost.

Mr. Hunden stated that there is a small amount of operational profit overtime, it does not support the upfront capital development cost. Most of the time, these are publicly funded facilities, but there are opportunities for sponsorships through naming rights, pouring rights, signage, etc. To the extent that this complex can be walkable to hotels, restaurants and amenities, it is possible to have some sort of a funding district.

Ms. Kramb asked about parking and accommodating the traffic and parking. Mr. Greusel stated that there is adequate parking, but the diagram as shown has pretty substantial parking for the fields shown.

Vice Mayor De Rosa asked about the assumptions made to inform the financial model and what percentage of usership would be used by local and/or non- or low-fee paying users. She also asked about the use model and whether it was 100% use all the time, etc.



RECORD OF PROCEEDINGS

Held

January 9, 2023

Page 9 of 13

Mr. Hunden stated that the healthiest facilities are those that are used throughout the week for local uses. He stated that they have tested the market and have found that there is a reliance on local usage during the week after school until well into the evening. The facilities that are just tournament-use are found not to fair so well. Mr. Sheridan stated that there are different assumptions based on the different sports, but the assumptions were based on feedback received from local interviews. The fact that some of the fields are lit and turf allows practices and games to go further into the evening.

Ms. Amorose Groomes expressed understanding to the swim parents that were present and stated that, she too, has had to travel for her kids’ sports. She stated that there are still kids whose sport will not be represented as part of the proposed facilities. She wanted more information about how the lit turf fields work. She also inquired about the cost to turf a field.

Mr. Hunden stated that turf gives a great deal of flexibility to do more with the space. Turf costs about \$2 million per field. The value of a synthetic field is that it does not get torn up as quickly as grass fields.

Ms. Amorose Groomes stated that she is supportive of this proposal conceptually. She looks forward to seeing more on funding models and having future conversations.

Ms. Alutto stated that one of the things that keeps kids out of participating in sports is the cost of traveling to different cities so often and the financial hardship that could create.

Mr. Hunden stated that the indoor facility portion of the proposal provides opportunities for a convertible amenity locally.

Mr. Reiner asked about the irrigation for the softball and soccer fields and whether or not they would be taking advantage of the aquifer that is under Darree Fields for free water. Ms. Amorose Groomes stated there is an existing well on the property that is currently used for irrigation.

- Parks and Recreation Master Plan Update

Mr. Earman provided a brief introduction. He provided a timeline of the work that has been done on this update and future steps. The City has contracted with Pros Consulting to complete the updated Parks and Recreation Master Plan. As part of the process, Pros Consulting has worked with City staff to conduct significant community outreach, including a community-wide public forum, one-on-one meetings with community leaders and stakeholders, a dedicated website to obtain community feedback, including a community-wide survey, and a statistically valid, randomly sampled survey. Additionally, Pros Consulting incorporated insights from the 2035 Strategic Framework, the 2022 Community Attitudes Survey, the MORPC Rapid 5 Study, and other existing studies. Pros Consulting will present the findings from the “Discover” phase of the process when Council discusses this topic in greater detail at their work session on January 17, 2023. Based on the findings from the areas identified above, the PROS consulting team, in conjunction with City staff, has preliminarily identified five key focus areas, as well as respective goals for each key focus area. The focus areas include:

  - **Key Focus Area: Park Land**
    - Goal: Acquire and develop new parkland, and maximize the value of each park type currently in the system to reach the full recreation value associated with its design.
  - **Key Focus Area: Recreation Facilities**
    - Goal: Continue to be the leader in indoor and outdoor community-based facilities for people of all ages and interests.
  - **Key Focus Area: Program Services**
    - Goal: Enhance parks and recreation facilities through new or improved



RECORD OF PROCEEDINGS

Held

January 9, 2023

Page 10 of 13

program services to maximize the community’s investment in its facilities and enhance their impact on the quality of life for Dublin residents.

- **Key Focus Area: Park and Recreation Operations**
  - Goal: Provide industry-leading and innovative services for parks and recreation operations to deliver an exciting and high-quality experience for Dublin residents.
- **Key Focus Area: Financing**
  - Goal: Expand the funding options available to the Parks and Recreation Department to fund the community’s desire for a world class parks and recreation system that meets or exceeds the community’s vision for Dublin.

Following the work session, City staff and Pros Consulting will refine proposed recommendations based on City Council’s feedback. City staff will return to Council with the proposed recommendations and revisions for further Council review prior to approval of the final Parks and Recreation Master Plan.

Mr. Earman reviewed some of the public engagement that has been present through this process. He stated that there have been over 4,400 participants in this process. There was also a statistically valid survey that was conducted with 521 participants. He provided a sample of the findings of that survey including:

- Facility Priority Investment Ratings showed the highest score going to aquatic/pool facilities; and
- Recreation Programming Priority Ratings showed the highest score going to adult sports.

Mr. Earman reviewed next steps following the work session: refine assessments with specific recommendations, focus workshops for the public as needed, follow-up with City Council and a provide a final draft to Council for consideration.

Christopher Elliott, 5264 Forest Run Drive, shared that he is a parent of a Dublin Sea Dragons swimmer, a Dolphin Swim Team Board Member and a USA Swimming Official for the Ohio Local Swimming Committee. He stated the results of the Parks and Recreation survey show the highest priority to be aquatics. He stated that there is an unmet need and not all aquatics are created equal. Dublin has access to pools, but is lacking a 50 meter facility. The Dublin Community Recreation Center (DCRC) is the only year-round facility available to 3 high schools and over 300 Dublin Sea Dragon Swimmers. He would like to see aquatics included in the proposal of the sports complex. He commented on the talent and skill of the swimmers in Dublin, but they need a 50 meter pool. He stated that he recognizes the significant investment a facility like this would be, but it would have many benefits well into the future and could be an economic tool as people come to Dublin to use the facility.

Joe Geskey, 9314 Tartan Ridge Blvd, stated he too, is a swim parent and asked how many differently abled athletes and parents were interviewed. He shared that a parent of a special needs athlete stated on social media that they have to go out of town for programming to participate in. He mentioned a few cities that have a smaller population than Dublin that still have 50 meter pools, such as Findlay, Ohio. He shared that Dublin is represented very well in these competitive events. Swimming is the fourth most popular sport in the United States.

Ashley Randolph, 9219 Golden Rose Way, shared that when the DCRC was built we had one high school in Dublin and now there are three. She stated that there are swimmers being cut from the team not because of talent, but due to space. She noted that there are other sports that could use a 50 meter facility other than competitive swimming and leisure swimming such as water polo, and synchronized swimming. It could also be used for Special Olympics, rehabilitation, or water aerobics also.

Mr. Keeler thanked the residents that came to speak and stated that it is worth a look.



RECORD OF PROCEEDINGS

Held

January 9, 2023

Page 11 of 13

Ms. Amorose Groomes clarified that these topics were brought together on the agenda, but they are two separate topics. An aquatic facility would not make sense as part of the proposal that was brought forward by Visit Dublin. She stated that the schools have been mentioned several times and this study did not involved the schools. If an aquatic facility were to be considered, it would be in partnership with the schools so their teams could benefit as well. She explained that just because the aquatic facility is not included in the Darree Fields study does not mean that Council is not interested in an aquatic facility.

Ms. Kramb stated that the schools are a completely different entity that spans an area twice as large as the City. She pointed out that responses to the surveys came from the school district parents as well.

Ms. Alutto stated that this government body has a great relationship with the schools governing body and has standing meetings with members of their board. She is happy to bring this topic up to the schools and let them know that Council would like to have the conversation with them about aquatic facilities.

Mr. Keeler explained how property taxes are distributed and how some things are funded and subsidized.

Mayor Fox stated that this Parks and Recreation Master Plan calls out what is important to residents, what the needs are and how we meet those needs in the future. She thanked everyone for their comments.

STAFF COMMENTS

Ms. O’Callaghan shared the following:

- Congratulations to the Transportation & Mobility Department on receiving the silver level Bicycle Friendly Community award from the League of American Bicyclists honoring the City’s efforts to build better places for people to bike. Dublin was one of five cities to receive an upgrade from bronze to silver status in the Fall 2022 application round, making Dublin the first community in Ohio to achieve this rank. The silver-level award recognizes Dublin’s commitment to improving bicycling conditions through investments in bike education programs, regular bike events that promote and encourage people to choose biking, pro-bike policies and bike infrastructure. This achievement was a collaborative effort from many organizations including Dublin City Schools and the Dublin Chamber of Commerce. In addition to our community partners, key staff supporting the effort were JM Rayburn, Tina Wawszkiewicz, Jenny Rauch, Aisling Babbit, Shawn Krawetzki, and Jeannie Willis. Also, staff would like to thank Council for their support in constructing critical infrastructure and expanding cycling options, such as CoGo, the employee e-bike share, and the mobility hub.
- Pumpkin composting wrapped up in early December. Over 67,000 pumpkins were diverted from the landfill. This is a 15,000 pound increase from the previous year. The pumpkins were taken to a farm in Delaware to be used for compost. Staff looks forward to continuing to grow the pumpkin composting program this year.
- On June 13, 2022, Council passed Ordinance 22-22 which appropriated funding from the City’s General Fund from funds made available by the receipt of American Rescue Plan (ARPA) Funding. The appropriations and corresponding memorandums of understanding (MOUs) for all external organizations receiving appropriations included in that Ordinance, including the Dublin Arts Council, Visit Dublin Ohio, the Dublin Food Pantry, Dublin Bridges, the Dublin Community Foundation, Syntero and the Dublin Chamber of Commerce were executed and paid last year. The Department of Finance will continue monitoring and administering these grants as required by the Ordinance under the terms executed in the respective MOUs.



RECORD OF PROCEEDINGS

- She reminded everyone that there will be a public meeting regarding renewable energy equipment for solar power this Wednesday, January 11<sup>th</sup> from 6:30 to 8 p.m. in the Council Chamber. Virtual participation will also be accommodated. Information is on the front page of the City’s website. We are also conducting a community-wide survey, which can be found on the City’s website. The survey has been distributed through the City’s communications channels, including social media, eNews and a postcard mailed to residents. We invite all residents to take the survey and consider attending Wednesday’s meeting in person or remotely. Input from the survey and public input meeting will be shared with Council at the January 17<sup>th</sup> Work Session.
- On Monday, January 16, the City will be hosting the kickoff of the MLK CIVIC SERVICE SERIES. In honor of Dr. King’s legacy of service to others, the first of four civic days of service will be on Monday, January 16 in partnership with Syntero, focusing on mental health and isolation. Volunteers will gather for an impact discussion on the effects of social isolation, and then make caring cards and placemats for people living in assisted living and skilled nursing facilities, and delivering them to all Dublin area facilities. Other impact discussions and projects set for the rest of the year focus on Historic Dublin in April, nonprofit outreach in September, and home safety in November. More information can be found on our web site or by calling Outreach & Engagement. This concept was suggested by the CIAC (Community Inclusion Advisory Committee).
- In early March, you will be seeing a few more teens on a regular basis at Council meetings. We will be hosting 12 local teens from the community (Dublin Schools, Hilliard Schools, Private/Parochial and Home School) for discussions on local government. Students will arrive 30 minutes prior to a Council meeting, stay for one hour, and then have a discussion 30 minutes afterwards, for learning and exposure to our form of government, government careers and more. They will also be asked to attend other public meetings such as PZC and BZA. A detailed memo explaining the program will be provided in your January 30<sup>th</sup> packet, but we wanted to have you preview in case you hear about it before then.
- Notification will be going out to residents regarding the following engineering projects:
  - South High Street Utility Burial – Phase 2 Project
  - Riverside Drive Utility and Shared-Use Path Extension, Area 3 Project
  - Waterways Maintenance Program
- The City has selected Houseal Lavigne for the update to the Community Plan. They are an internationally recognized planning and design firm located in Chicago, IL. Houseal Lavigne has completed more than 450 plans across the country and have been recognized locally and nationally for their comprehensive plans, as well as their work with ESRI. Houseal Lavigne presented the most innovative and diverse engagement strategies, including grassroots efforts for public engagement. They also provided a more modernized and integrated approach to the content of a Community Plan. Staff is working with the consultant on data collection and analysis and outlining the initial organization strategies. Public kickoff meetings and roundtable discussions, including one specifically with City Council, are expected in early 2023. We will continue to update City Council as these efforts continue to move forward.
- Thanked all staff who worked over the holidays.

COUNCIL REPORTS

- There were no committee reports.

COUNCIL ROUNDTABLE

Ms. Alutto wished everone a Happy New Year. She thanked Staff for working over the holidays and clearing the roads in the difficult storm.



RECORD OF PROCEEDINGS

Held

January 9, 2023

Page 13 of 13

Ms. Amorose Groomes wished everyone a Happy New Year and reiterated thanks to staff. She shared that January 22-25 she will be in Washinton D.C. with MORPC to present the MORPC legislative agenda. They will be meeting with legislators that serve our area. There are two items of interest that they will be meeting about: the Federal Rail Administration regarding rail network and where connections will be made and the bridge over I-270 and garnering federal dollars to help with the cost of that bridge.

Ms. Kramb wished everyone a Happy New Year and thanked staff for working over the holidays.

Mr. Keeler wished everyone a Happy New Year.

Mr. Reiner wished everyone a Happy New Year and congratulated the former members of the Bicycle Task Force for playing a part in the history of bicycling in Dublin that led to us now receiving the Silver award. He stated that he hopes Dublin will be a leader in the flavored tobacco ban.

Vice Mayor De Rosa congratulated everyone for receiving the Silver award and agreed it should be shared with the original Bike Ambassadors. She expressed appreciation to former Union County Commissioner Chris Schmenk who’s term ended in December 2022. She provided an update on the trip that was taken to Germany to explore holiday markets. She provided photos of some of the markets that they experienced. Germany was selected because it was in Germany that most holiday markets started and are modeled after. The goal of the trip was to gather the foundational information required to construct a thorough feasibility study. They explored several different types of markets in different cities and met with management to understand the operations, etc. The group visited 22 markets in 5 cities in 5 days. A secondary goal was to document architecture, placemaking, etc. A more detailed report of findings from the trip will be coming to Public Services Committee at their February meeting.


Mayor Fox shared that on December 15 she attended the Ohio Mayor’s Alliance (OMA) meeting downtown. On December 16, she met the Indian Ambassador to the United States and the Consul General, based in New York, in downtown Columbus. They had heard about Dublin lighting the Dublin Link Bridge to honor their culture and were impressed by Dublin’s inclusivity. She thanked everyone for their attendance and involvement with the Wreaths Across America event. A COMMA (Central Ohio Mayors and Managers Association) meeting was held recently at MORPC and they received some updates on what MORPC is working on. Finally, she shared an experience she had with two young ladies singing in the Dublin Village Tavern and collecting money which they gave to the Dublin Food Pantry.

ADJOURNMENT

The meeting was adjourned at 9:46 p.m.



Mayor – Presiding Officer

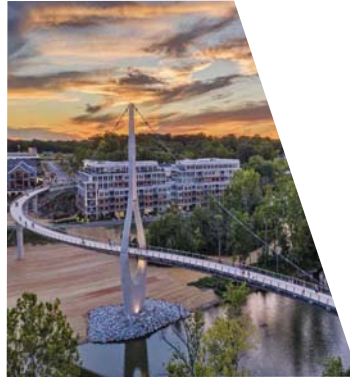


Clerk of Council



## Darree Fields Expansion Market Demand, Financial Feasibility & Economic Impact Study

January 9, 2023



### Table of Contents

1. Executive Summary
2. Project Profile
3. Economic, Demographic & Tourism Analysis
4. Local Sports Facility Supply & Demand Analysis
5. Regional Sports Facilities Analysis
6. Sports Tournaments & Opportunity Analysis
7. Aquatics Market Analysis
8. Support Amenities: Hotel & Restaurant Analysis
9. Sports Tourism Facility Case Studies
10. Operational Standards & Management Strategy
11. Demand & Financial Projections
12. Economic, Fiscal and Employment Impact Analysis
13. Market Findings & Recommendations

# 01

## Executive Summary



### Key Questions

- What is the current situation as it pertains to sports in Dublin and the Greater Columbus market?
- Is there a market opportunity for a competitive youth travel sports development (Project) and if so, what components are recommended (indoor and/or outdoor)?
- What competitive outdoor and indoor facilities exist both locally and regionally? How will the Project interact with the competitive market?
- What is the viability of the Project to regularly compete for and host regional, sub-regional, or national tournaments and other events that will bring visitors to stay, dine, and shop in Dublin?
- What is the opportunity for the Project to accommodate recreational needs for Dublin?
- How will this youth sports complex perform and what will its economic impacts be?
- What value of public expenditures are rationalized by impacts generated by the Project?
- What is the recommended Project and why is it compelling?



### SWOT Analysis

The following SWOT analysis details the strength, weaknesses, opportunities and threats related to the proposed youth sports facility in Dublin, Ohio.

#### STRENGTHS



- Growing population and strong local user base between DYA and club sports
- Strategic location within the state of Ohio and the Midwest
- No major competitive field sport or indoor facilities within Columbus

#### OPPORTUNITIES



- Youth sports complex, w/ indoor/outdoor components to serve variety of sports
- Local facilities for recreation and quality of life
- Long duration of play, daily and seasonally w/ synthetic turf & lights
- Private sector partnerships
- Sports Tourism

#### WEAKNESSES



- Lack of quality indoor and outdoor facilities that has led to decreasing and lost business
- Lack of turf and lighted spaces that restrict scheduling
- Lack of development around Darree Fields

#### THREATS



- Other proposed, competing facilities with the Columbus market
- Regional competition for tournaments at established facilities
- Private indoor facilities in neighboring cities
- Competing interests between club and recreational usage

### How to Capitalize on Strengths & Mitigate Weaknesses



The following key headlines outline ways Dublin can both leverage their strengths and mitigate some of their weaknesses with the proposed youth sports complex.

#### Strong Local/Regional Demand

Club teams and DYA have experienced strong growth concurrent with the population growth. Indoor and outdoor clubs and organizations have expressed that the lack available court and field time has restricted growth of their programs. Dublin and its surrounding cities have a strong demand base that can fill court and field space throughout the week within a large sports complex.

#### Weak Supply Within Columbus

Provide the community with a central, high-quality facility for indoor and outdoor sports. DYA and club teams are in need of additional court and field time and have been restricted by the usage of local school spaces. A regional facility in Columbus has the potential to recapture demand that currently leaves the market for tournaments and induce tournament visitation from within the Midwest.

#### Project Phasing & Critical Mass

Youth sports complexes have seen increasing costs, leading to the need of project phasing. Phasing will help with initial costs and allow for performance evaluation, assisting in identifying long-term opportunities as the market changes. Further development of Darree Fields to make it a regional sports hub will require supporting development for retail, restaurants and hotels.



Headlines – Dublin Youth Sports

The following bullets summarize the key findings and headlines. In order to assess the viability of any project and make informed recommendations, there are six key elements that must be considered.

- Site Needs.** General site parameters for a successful youth sports facility include availability of land for current and future development, accessibility, proximity to hotel/restaurant nodes and flat topography. Roughly 15-20 acres are typically needed for an indoor facility, depending on future expansion and parking. For a large outdoor complex, field count dependent, usually over 100 acres is needed.
- The Industry.** The youth sports industry, specifically facility development, has experienced tremendous growth over the last several years. The industry is driving spending and overnight stays for all types of municipalities around the country. While many industries that fall under the tourism umbrella were hurt by the COVID-19 pandemic, the youth sports industry has stayed consistent in terms of driving economic impact for municipalities.
- The Supply & Demand.** Dublin has the opportunity to be the first mover in the Columbus area for a multi-purpose turf complex and a mid-sized indoor facility. Local demand for indoor and outdoor space is currently not being accommodated, leading to restricted field/court times and overall growth of organizations. The lack of facilities has led to decreasing participation of Dublin-based programs and decreased participation in local tournaments from teams that travel elsewhere.
- Case Studies.** Flexibility is a major ingredient to the success of youth sports developments. The ability to host a diverse mix of sporting events, and potentially non-sporting events will enhance the chances of a facility's success. Key on-site amenities that complement a major youth sports complex include food and beverage offerings, lounge/play areas for participants and fans, community space and physical therapy/sports performance space.

Recommendations Overview

Proposed Site



Dublin Youth Sports: Recommendations

Based on the analysis of the youth sports market in the Dublin area, the region and interviews with market experts, tournament organizers, and other stakeholders, HSP recommends the development of an indoor & outdoor complex.

Upon full build-out HSP recommends the following:

- 8 full-sized multi-purpose, lighted turf fields
- 14 grass multi-purpose fields (soccer, lacrosse, archery, Australian rules football)
- 5 grass softball diamonds
- 9 hardwood basketball courts (12 volleyball)

Phasing will help with initial costs and assist in identifying long-term opportunities as the market changes. Ultimately, HSP recommends turf and lighted multi-purpose fields to extend the available time of play throughout the season and to protect against the current issues weather presents for sports activity in Dublin. The highest potential for outdoor youth sports tourism in Dublin is within field sports. In order to attract regional/national tournaments for outdoor field sports, Darree Fields needs to compete with the number of fields found at regional competitors. With 9 indoor basketball courts, (12 volleyball courts) Dublin will have the ability to host indoor sports tournaments, which is currently lacking in the greater Columbus area.

Detailed Recommendations and Site Plan



Multi-Purpose Turf Field Examples

To maximize the functionality of turf spaces, sports complexes around the country have begun to incorporate diamonds and field sports in the same space.

In order to maximize the potential for tournament activity in Dublin, existing baseball diamonds would need to be converted to soccer fields. By including the ability to use the turf fields for baseball and softball, the fields that would be removed can be replaced with the ability to use the turf fields as diamonds.





## Indoor Facility Recommendations

As an add to the Project, the indoor facility can be configured as a small arena with retractable seating to convert to small arena, capable of hosting concerts and live entertainment shows. The City of Dublin's purchase of additional land to expand Darree Fields opens the door for the potential to develop a facility like the previously proposed Bridge Park Fieldhouse.

HSP reviewed the feasibility study prepared for the proposed Bridge Park Fieldhouse and recognizes the gap in the market for a small arena with a capacity between 3,000 and 5,000. HSP's recommendation for an indoor sports facility within Dublin is similar to the proposed elements of the Bridge Park Fieldhouse in terms of number of indoor courts. While the dynamic configuration would be more costly, the venue would have the potential to host a wider variety of events beyond court sport tournaments.



## Lost Business & Declining Tournament Success

Visit Dublin provided the following tournaments that the city has lost in 2022 and 2023.

- Ohio State Cup Soccer Tournament (May 2023) – lost due to field quality, moved to Voice of America Park in Cincinnati – 150 teams
- Resolute Soccer Tournament (June 2023) – lost due to field availability; proposed new event
- Collegiate Archery National Championships (July 2023) – lost due to availability – 500 archers, 520 room nights in previous competitions, roughly \$200,000 total economic impact
- Lacrosse Tournaments (June and July) – lost due to availability; proposed new events with 60 projected teams (20% outside of local market)
- USA Ultimate Frisbee (August 2023) – lost due to field availability – 48 teams (1,200 people)
- Flag Football (June/July 2023) – lost due to field conditions – 100 teams (400-700 players)

Dublin has previously hosted these tournaments but due to field quality and the lack of total fields in Dublin, tournament operators have elected to move their events to other cities in the region. Loss of tournament play has resulted and will continue to result in lost room nights and spending in Dublin, which can be addressed through the Project's efforts to introduce additional, high-quality fields and surfaces in Dublin.



## Dublin Middle School Enrollment Projections

There are currently five public middle schools in the Dublin City School District. Between 2021 and 2030, enrollment is projected to increase from 3,851 to 4,326 (94 percent of capacity). As enrollment increases, a youth sports complex in Dublin has the potential to offer additional athletic space to support school athletic programs. Club teams and Dublin Youth Athletics utilize these school spaces for practices and games. As enrollment increases, the athletic spaces at schools will need to be utilized more often by the school's programs, leaving less time for other organizations to use their spaces and increasing the constraints on available court and field space within Dublin.

Dublin Middle School Enrollment										
School	Capacity	2021-2022	2022-2023	2023-2024	2024-2025	2025-2026	2026-2027	2027-2028	2028-2029	2029-2030
Henry W. Kanner	964	802	795	770	775	730	700	657	662	670
Everetts Run	950	899	830	864	1000	1083	1164	1291	1447	1513
William Gatzert	881	658	701	687	701	713	731	743	727	697
John Sallis	862	722	730	748	721	780	671	675	680	667
Ann Simpson Davis	891	860	838	856	832	827	788	779	789	776
Middle School Total	4,555	3,851	3,894	4,025	4,029	4,053	4,054	4,145	4,325	4,326
Source: Dublin School District										
Dublin Middle School Utilization										
School	Capacity	2021-2022	2022-2023	2023-2024	2024-2025	2025-2026	2026-2027	2027-2028	2028-2029	2029-2030
Henry W. Kanner	964	83%	83%	80%	80%	76%	73%	68%	69%	70%
Everetts Run	950	95%	87%	91%	105%	114%	123%	136%	152%	159%
William Gatzert	881	75%	79%	78%	79%	80%	84%	85%	82%	79%
John Sallis	862	84%	85%	87%	84%	91%	78%	78%	79%	77%
Ann Simpson Davis	891	96%	94%	95%	93%	93%	88%	87%	88%	87%
Middle School Total	4,555	89%	89%	88%	88%	89%	89%	91%	94%	94%
Source: Dublin School District										

## Dublin High School Enrollment Projections

Interviews with various groups within Dublin stated that the city is considering building a new high school because of the growing population and the enrollment levels compared to the school's capacities. Between 2021 and 2030, projections prepared for the city show that the average utilization of academic spaces within the three existing high schools will increase from 85 percent to 95 percent. As enrollment increases within Dublin, a youth sports complex within Dublin would help support athletic programs with additional court and field space.

Dublin High School Enrollment										
School	Capacity	2021-2022	2022-2023	2023-2024	2024-2025	2025-2026	2026-2027	2027-2028	2028-2029	2029-2030
Coffman High School	2,000	1,509	1,863	1,893	1,846	1,880	1,843	1,810	1,777	1,741
Jeannette High School	2,400	1,930	1,989	2,037	2,178	2,250	2,418	2,579	2,661	2,857
Spaulding High School	1,750	1,371	1,381	1,390	1,413	1,467	1,442	1,441	1,388	1,396
High School Total	6,150	5,210	5,243	5,320	5,437	5,597	5,703	5,830	5,826	5,994
Source: Dublin School District										
Dublin High School Utilization										
School	Capacity	2021-2022	2022-2023	2023-2024	2024-2025	2025-2026	2026-2027	2027-2028	2028-2029	2029-2030
Coffman High School	2,000	85%	93%	94%	92%	94%	92%	91%	89%	87%
Jeannette High School	2,400	80%	83%	85%	91%	94%	101%	107%	110%	119%
Spaulding High School	1,750	78%	79%	79%	81%	84%	82%	82%	79%	80%
High School Total	6,150	85%	85%	86%	88%	89%	92%	93%	93%	95%
Source: Dublin School District										





Dublin Youth Athletics Recreation

Dublin Youth Athletics is the city's recreational and travel sports organization managed by parent volunteers, the City of Dublin Recreation Services Department and the Dublin City School. D.A. offers baseball, softball, lacrosse, volleyball, basketball and golf programs.

On average, participation in D.A. programs has increased by 11.1 percent since 2019. The majority of programs saw declines in participation due to COVID, but a number of programs have bounced back to pre-pandemic levels and exceeded past participation. Baseball, softball, recreational basketball and volleyball have all seen increased participation, yet there has been few deliveries of new facilities in Dublin, creating scheduling difficulties throughout the city, as reported by D.A.

D.A. manages one tournament per year for baseball, lacrosse and basketball throughout the year. Each tournament has seen decreased participation (number of teams) since 2019. Multiple representatives within D.A. shared that the main reasons for decreased tournament participation is due to the lower quality facilities Dublin has to offer compared to its surrounding cities.

Dublin Youth Athletics Summary of Programs					
Sport/Program	2019	2020	2021	2022	2019 - 2022 Change
Baseball	-	191	176	176	-15.2%
Recreational Baseball	605	584	515	686	17.8%
Fall Baseball	175	-	227	342	168.6%
Select Softball	-	67	48	78	14.1%
Recreational Softball	205	232	207	291	21.2%
Boys Lacrosse	188	175	152	149	-0.6%
Boys Lacrosse (Fall)	-	102	119	88	-15.9%
Girls Lacrosse	188	181	144	182	-3.3%
Girls Lacrosse (Fall)	-	107	147	131	18.3%
Boys Volleyball	22	17	102	63	65.7%
Girls Volleyball	52	42	102	154	17.2%
Recreational Basketball	1,508	-	1,555	1,789	15.7%
Tennis/Basketball	53	48	-	150	28.7%
Total Average	3,175	1,698	3,518	4,281	17.4%
*2020 - 2022 Change					
Source: Dublin Youth Athletics					

Dublin Youth Athletics Summary of Tournament Participation					
Tournament	2019	2020	2021	2022	2019 - 2022 Change
Recreational Baseball Tournament	117	-	42	176	-1.7%
Girls Lacrosse Jamline	41	0	26	34	-25.6%
Holiday Basketball Tournament	41	35	0	77	-17.6%
Total Average	99	35	118	176	-24.7%
Source: Dublin Youth Athletics					

Indoor/Outdoor Facilities

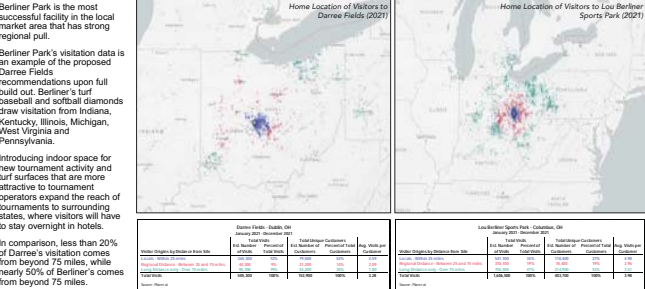
Columbus Berliner Sports Park

Location: Columbus, OH  
Cost: \$1.5M  
Owner: Columbus Recreation  
Operator: Columbus Recreation  
Sports Features:

- 31 turf diamonds (15 lighted)
- baseball courts
- 8 volleyball courts

Notes:  
Berliner Sports Park is located in southwest Columbus, out of the 31 fields at the park, 15 have lights, allowing for prolonged tournament days and more teams per tournament. In 2019, each field was turned into synthetic turf surfaces.

Visit Data to Drive Field Development at Berliner Park



Interview with Columbus Parks & Recreation

- Interviewed Columbus Parks & Recreation to understand the potential for additional tournament opportunities in the region. The interview indicated the following:
- Berliner Park has 31 turf fields, 15 of which have lights that allow for tournament play from 8 AM to midnight during tournaments. The number of fields allows the facility to host regional and national tournaments without the need of additional facilities.
  - The largest tournament at Berliner Park typically draws 420 teams and spans four days. In 2023, Berliner Park has 51 scheduled tournaments through September, but October tends to be one of their busiest months. The park hosts an average of 65 tournaments per year.
  - There is adjacent land available to the park that the city is looking to purchase with the desire of developing multi-purpose turf fields for field sports.

Local Recreation Implications

- In the local market, there is a shortage of courts and only one complex has over four basketball courts (eight volleyball) which makes tournament organization difficult. This forces organizers to use multiple facilities and span across a wide geographic area. No singular facility has the capability to host tournaments without using other facilities, most of which were designed to be training facilities and accommodate local weekend usage.
- Lack of court and turf space space has led to organizations consolidating and players leaving the market to seek usage of better facilities. Multiple volleyball and basketball organizations have developed their own small facility to control court time, while soccer organizations have developed their own turf spaces to have higher quality offerings than what is available in Dublin.
- Several local clubs expressed strong interest in being anchor tenants of the facility.
- Many of the outdoor facilities in the county are older parks and fields that have experienced wear and tear over the years, which has led to less tournament activity.



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Regional Sports Facility Analysis



## Regional Sports Facility Analysis

The Midwest has a strong supply of facilities that are capable of hosting tournaments, but the lack of a competitive facility in Dublin presents an opportunity for the project. Dublin has the potential to retain teams in the Columbus market that currently leave for tournament play and to capture tournament activity that is currently played elsewhere in the region.

Interviews with local organizations revealed that teams in the Columbus area frequently use these facilities throughout their season for regional and national tournaments. Facilities such as Sandusky and Cincinnati are attracting Dublin and Columbus-based organizations multiple times per year.

This section will detail these competitive regional facilities and review visitation data to show potential tournament activity for the project.

Regional Youth Sports Facility Supply									
Legend									
Indoor Facility									
Outdoor Facility									
Softball/Fieldhouse									
Facility Name	Location	Distance from Dublin, OH (miles)	Baseball	Softball	Artificial Turf Field	Outdoor Softball	Outdoor Field House	Indoor Softball	Indoor Field House
Adrian Sports Center	Dublin, OH	70.2	-	-	-	-	-	-	8
Blue Ash Sports Center	Cincinnati, OH	66.7	-	-	-	2	-	-	11
Woodward's Park	West Chester Township, OH	122.0	-	-	-	2	22	-	-
Cedar Point Sports Campus	Sandusky, OH	108.0	10	18	-	8	-	-	8
Romix Grassroots Sports Academy	Cincinnati, OH	102.0	6	8	-	-	-	-	-
Spokane Parkview Fieldhouse	Fort Wayne, IN	142.0	6	8	-	-	-	-	-
Highland Sports Complex	Indianapolis, IN	152.0	6	6	1	1	-	-	-
Goodrich Sports Complex	Westfield, IN	138.0	8	16	3	7	24	26	-
Elizabeth River Sports Park	Elizabeth River, KY	261.0	-	-	-	14	-	-	12
Total Average		134.7	36	54	4	34	46	46	-
Source: Various									

## Regional Sports Facility Analysis

The most relevant regional competitive facilities within Ohio are found in Sandusky, Dayton and Cincinnati. Cincinnati has emerged as a regional hub for sports with separate facilities with diamonds, outdoor turf and grass fields and court sports.

Other relevant regional facilities are found in Fort Wayne, Indianapolis, Elizabethtown and Philadelphia.

The following sections include an analysis of the most relevant indoor and outdoor facilities in the regional market.



06

Regional Market Implications



- The Midwest is home to multiple youth sports complexes capable of hosting regional tournaments. Within Ohio, Sandusky and Cincinnati currently attract consistent regional tournament visitation from Illinois, Michigan, Indiana, Kentucky, and Pennsylvania. Tournament operators in all sports communicated that Dublin is a prime market within Ohio for a sports facility so capture this regional demand as a central location for visitors in the region.
- Visitation data shows youth sports participants leaving Dublin and the greater Columbus area for other regional markets. Data from competitive facilities shows that people pass through the Columbus area or travel further distances than a trip to Dublin for tournament play. A facility in Dublin has the potential to capture this lost demand.

06

Sports Tournament and Opportunity Analysis



## Tournament Opportunity Implications & Recommendations

- HSP analyzed the local and regional youth sports facility market to understand where any potential gaps exist for the potential development of a large recreational and tournament facility in Dublin. The section also dove into industry trends that are consistent of top performing facilities across the nation to identify any opportunities in this area. The following implications were drawn:
- The local supply of facilities is not meeting the current demand for court space in Dublin. The introduction of a new large indoor facility will cater to both local use as well as drive tournament demand on the weekends. An opportunity exists for more indoor multi-purpose space that can be used for basketball, volleyball and other flat-floor sports and activities.
  - Currently, Dublin does not have any turf surfaces for outdoor sports, which leads to scheduling complications and cancellations on an already tight schedule for DYV programs and club organizations. An opportunity exists for multi-purpose, turf space that can be used for soccer, baseball, softball, lacrosse and cricket in Dublin.
  - The central location of Dublin lends itself well to capturing large statewide and regional tournaments. Dublin is an optimal location with the Columbus market because of its ease of access compared to downtown Columbus.
  - A minimum of eight hardwood basketball courts and 6 outdoor multi-purpose artificial turf fields will have the ability to capture regional tournaments that will drive significant impact for Dublin.



## Sports Tourism Case Studies



## Bettendorf, IA

- **Location:** Bettendorf, IA
- **Year:** 2017
- **Value:** \$50 million
- **Owner:** BetiPlex LLC
- **Developer:** BetiPlex LLC
- **Size:** 273,000 square foot indoor complex, 75-acre outdoor complex
- **Facilities:** 8 basketball courts (12 volleyball courts), indoor turf field (115 yards by 75 yards)
- **Lighting:** 10 lighted turf diamonds with adjustable fencing (convertible into 6 turf soccer fields)
- **Fields:** 2 multi-purpose turf fields, 2 grass fields
- **Other Amenities:** 5 sand volleyball courts, physical therapy center, retail shop, office space, concessions

Phase one of the project included over \$10 million in city incentives (\$3.87 million in infrastructure improvements and \$4.9 million in TIF). Due to the project's success, an expansion of the facility was approved in February 2022 for more multi-use turf fields, a three-story golf entertainment facility, restaurants, bars and a hotel. Bettendorf has committed \$5.8 million in economic development grants and a 20-year, 75 percent TIF rebate to the expansion project.

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00000000: Round Rock, Texas  
 00000000: City of Round Rock  
 00000000: City of Round Rock, SFM

The City of Round Rock has two premier sports complexes which are outlined below. Each of the facilities is within a 10-minute drive of one another:

- 6 basketball/12 volleyball
- 10 soccer, 5 artificial (1 championship), 5 grass (1 championship), 25 diamonds (20 baseball, 5 softball)

□□□□□□ In 2008, the City of Round Rock funded a \$18.2 million renovation and expansion of Old Settlers Park, which spark the city's campaign as the "Sports Capital of Texas."

In 2012, The City of Round Rock issued \$7.8 million in bonds for the Round Rock Sports Center, which cost a total of \$14.5 million. The bonds are being paid back using a two-percent increase to the city's Hotel Occupancy Tax and the remaining cost of the facility was covered by the city's general fund.

In 2017, Old Settlers Park underwent a 6-acre, \$27 million expansion project that added the Round Rock Multipurpose Complex.

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The main funding methods used for youth sports projects around the country include Tax Increment Financing, city general funds, parks and recreation funds, hotel occupancy tax and public-private partnerships with a private developer and support from the city. The following bullets summarize the funding methods for case study facilities.

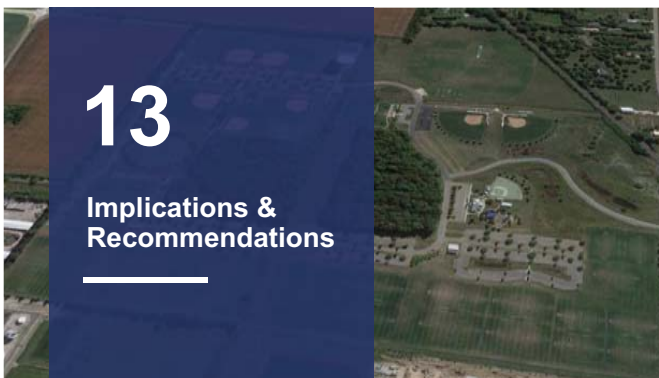
- TBK Bank Sports Complex** - Phase one of the project included over \$11 million in city incentives \$11 million in infrastructure improvements and \$11 million in TIF. Due to the project success, an expansion of the facility was approved in February 2011 for more multi-use turf fields, a three-story golf entertainment facility, restaurants, bars and a hotel. The landlord has committed \$11 million in additional private grants and \$11 million in TIF to the project.
- Round Rock, Texas** - In 2007, the City of Round Rock funded a \$11 million innovation and expansion of Old Settlers Park, which spark the city's campaign as the Sports Capital of Texas. In 2011, The City of Round Rock issued \$11 million in bonds for the Round Rock Sports Center, which cost a total of \$11 million. The bonds are being paid back using a two percent increase to the city's Hotel Occupancy Tax and the remaining cost of the facility was covered by the city's general fund.
- MidAmerican Energy Company Replex** - The facility cost roughly \$11 million and was funded through a public private partnership. The contribution of the city was \$11 million. The facility was used to generate revenue through the sale of electricity. The city is in bonds that will be paid back through an increase of hotel tax, \$11 million of corporate pledges and donations. The rest of the funding was covered by grants, loans, and future tax revenues.
- Community First Champion Center** - The facility cost roughly \$11 million and is funded by an increase in local hotel tax. The Cox Cities Sports Development, Inc. is the subsidiary of the Cox Cities Corp. manages the hotel taxes generated by the Champion Center and is the basis, a portion of the revenue generated to be used to fund the project.

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## Implications & Recommendations



**LEGEND**

- American Football
- Soccer Field
- Baseball
- Softball
- Tennis
- Basketball
- Other

**SITE DATA**

Field	Size	Surface	Notes
American Football	100' x 60'	Grass	
Soccer Field	110' x 70'	Grass	
Baseball	90' x 60'	Grass	
Softball	60' x 30'	Grass	
Tennis	78' x 36'	Hard	
Basketball	94' x 50'	Hard	
Other	Various	Various	

**Phases**

**Phase 1 (High Priority)**

- Soccer (Softball Addition) 1st Field
- Softball
- Tennis
- Grass Surface
- Baseball
- Softball
- Softball

**Phase 2 (Future Priority)**

- Baseball (Softball) (Baseball)
- Softball

**Total Parking**

- 1,000 Cars (1,000)
- Concession Stand/Restaurant and Seating
- Play Area/Large Open
- Performance/Physical Therapy Area
- Meeting Room
- Lobby Space

**Notes:** HSP, Comprehensive Design

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Sports Complex Projections & Performance												
	Y1	Y2	Y3	Y4	Y5	Y6	Y7	Y8	Y9	Y10	Y11	Y12
Revenue (\$Bn)	\$ 1,044	\$ 1,211	\$ 2,088	\$ 2,224	\$ 2,441	\$ 2,538	\$ 2,610	\$ 2,710	\$ 2,794	\$ 2,871	\$ 2,948	\$ 3,100
Net Concessions/Catering	200	\$ 147	\$ 171	\$ 201	\$ 214	\$ 219	\$ 226	\$ 231	\$ 237	\$ 243	\$ 249	\$ 256
Advertising & Sponsorship (net)	102	\$ 68	\$ 72	\$ 73	\$ 74	\$ 75	\$ 76	\$ 77	\$ 78	\$ 79	\$ 80	\$ 81
Other	254	\$ 130	\$ 136	\$ 140	\$ 143	\$ 145	\$ 147	\$ 149	\$ 151	\$ 153	\$ 155	\$ 158
Total	\$ 1,300	\$ 1,424	\$ 2,460	\$ 2,639	\$ 2,800	\$ 2,972	\$ 3,053	\$ 3,167	\$ 3,269	\$ 3,367	\$ 3,483	\$ 3,615
Expenses (\$Bn)												
Salaries, Overtime & Benefits	\$ 759	\$ 82	\$ 1,242	\$ 1,326	\$ 1,394	\$ 1,398	\$ 1,424	\$ 1,449	\$ 1,471	\$ 1,500	\$ 1,504	\$ 1,531
General & Admin	550	\$ 35	\$ 35	\$ 35	\$ 35	\$ 35	\$ 35	\$ 35	\$ 35	\$ 35	\$ 35	\$ 35
Utilities	2,220	\$ 235	\$ 238	\$ 241	\$ 242	\$ 243	\$ 244	\$ 245	\$ 246	\$ 247	\$ 248	\$ 249
Sales & Marketing	178	\$ 38	\$ 34	\$ 31	\$ 28	\$ 26	\$ 24	\$ 22	\$ 20	\$ 18	\$ 16	\$ 14
Repairs & Maintenance	3,122	\$ 124	\$ 124	\$ 121	\$ 118	\$ 115	\$ 112	\$ 109	\$ 106	\$ 103	\$ 101	\$ 97
Insurance	27	\$ 37	\$ 37	\$ 37	\$ 37	\$ 37	\$ 37	\$ 37	\$ 37	\$ 37	\$ 37	\$ 37
Advertising & Other	333	\$ 133	\$ 133	\$ 133	\$ 133	\$ 133	\$ 133	\$ 133	\$ 133	\$ 133	\$ 133	\$ 133
Management Fee (% of Revenue)	8,800	\$ 111	\$ 143	\$ 211	\$ 221	\$ 231	\$ 241	\$ 251	\$ 261	\$ 271	\$ 281	\$ 291
Depreciation	5,076	\$ 115	\$ 115	\$ 115	\$ 115	\$ 115	\$ 115	\$ 115	\$ 115	\$ 115	\$ 115	\$ 115
Total	\$ 14,446	\$ 1,447	\$ 2,746	\$ 2,886	\$ 2,988	\$ 2,993	\$ 3,019	\$ 3,044	\$ 3,069	\$ 3,114	\$ 3,159	\$ 3,244
Net Operating Income	\$ 1,300	\$ 1,300	\$ 1,300	\$ 1,300	\$ 1,300	\$ 1,300	\$ 1,300	\$ 1,300	\$ 1,300	\$ 1,300	\$ 1,300	\$ 1,300

HSP projects that the Project will operate at a loss of \$11.1 million in Year 1. When the indoor facility opens in Year 2, HSP projects the Project will operate at a loss of \$11.1 million in Year 2. HSP projects the Project to operate at a profit. Over time, sports complexes develop a consistent and stable tournament model, leading to increasing operating margins. The most revenue is expected to come from space rentals, followed by net concessions/catering revenues.

The expenses shown in blue reflect the expenses projected at the opening of the outdoor components of the Project. In Year 1, general and administrative expenses are projected to increase by \$11.1 million, utilities are projected to increase by \$11.1 million, repairs and maintenance are projected to increase by \$11.1 million and advertising and other is expected to increase by \$11.1 million. All expenses are adjusted for inflation.

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Room ights

Input Inputs & Projections	Y1	Y2	Y3	Y4	Y5	Y6	Y7	Y8	Y9	Y10	Y11	Y12
Total Room Nights Generated	26,147	29,474	32,884	35,953	39,221	39,221	39,221	39,221	39,221	39,221	39,221	39,221
Soccer Tournaments	2,814	3,752	4,489	5,627	6,565	6,565	6,565	6,565	6,565	6,565	6,565	6,565
Baseball Tournaments	2,814	3,752	4,489	5,627	6,565	6,565	6,565	6,565	6,565	6,565	6,565	6,565
Lacrosse Tournaments	1,112	1,112	1,112	1,112	1,112	1,112	1,112	1,112	1,112	1,112	1,112	1,112
Baseball Tournaments	-	-	-	5,175	6,565	6,565	6,565	6,565	6,565	6,565	6,565	6,565
Volleyball Tournaments	-	-	-	7,762	9,554	10,358	11,444	12,938	12,938	12,938	12,938	12,938
Wrestling Tournaments	-	-	-	462	462	462	462	462	462	462	462	462
Cheer/Sports	-	-	-	328	328	328	328	328	328	328	328	328
Private Ball	-	-	-	113	141	141	141	141	141	141	141	141
Range/Special Events	-	-	-	10	108	111	118	154	154	154	154	154
Total	32,884	38,031	57,879	65,822	73,728	75,891	78,071	78,071	78,071	78,071	78,071	78,071

In Year 1, HSP projects the Project to generate over 26,000 room nights. Once the indoor facility is opened in Year 2, HSP projects the Project to generate over 38,000 room nights. Upon stabilization of the Project in Year 7, the Project is projected to generate over 78,000 annual room nights. Upon stabilization, the majority of room nights are projected to be generated by soccer tournaments, volleyball tournaments and basketball tournaments.

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irectIndirect & Induced et e e pending

As a result of the Project, the city will experience new visitors for tournaments and practices that would not have visited the market otherwise. These net new visitors will spend money in Dublin, supporting the local economy. HSP classifies spending in five categories: food & beverage, lodging, retail, transportation and other. HSP projects direct net new spending will total \$1.1 billion over 12 years. As this net new direct spending trickles through the Dublin economy, it generates induced and indirect spending.

Combined total net new spending within Dublin is expected to surpass \$1.1 billion over 12 years.

Direct Net New/Recaptured Spending to Dublin (2005) - Sports Complex												
	Year 1	Year 2	Year 3	Year 4	Year 5	Year 6	Year 7	Year 8	Year 9	Year 10	Year 11	Year 12
Food & Beverage	\$ 5,662	\$ 6,760	\$ 10,952	\$ 12,722	\$ 14,887	\$ 15,832	\$ 16,826	\$ 17,321	\$ 17,851	\$ 18,336	\$ 18,790	\$ 19,215
Lodging	\$ 1,943	\$ 2,315	\$ 3,816	\$ 4,799	\$ 4,902	\$ 5,199	\$ 5,508	\$ 5,814	\$ 6,044	\$ 6,279	\$ 6,507	\$ 6,731
Retail	\$ 2,968	\$ 3,529	\$ 5,722	\$ 6,448	\$ 7,779	\$ 8,275	\$ 8,794	\$ 9,058	\$ 9,330	\$ 9,609	\$ 9,894	\$ 10,181
Transportation	\$ 4,527	\$ 5,388	\$ 8,498	\$ 10,101	\$ 11,825	\$ 12,569	\$ 13,352	\$ 13,753	\$ 14,146	\$ 14,590	\$ 14,948	\$ 15,344
Other	\$ 2,454	\$ 3,107	\$ 5,107	\$ 5,920	\$ 6,940	\$ 7,380	\$ 7,841	\$ 8,076	\$ 8,319	\$ 8,568	\$ 8,815	\$ 9,015
Total	\$ 17,774	\$ 21,145	\$ 34,297	\$ 39,460	\$ 46,330	\$ 49,209	\$ 52,322	\$ 53,891	\$ 55,558	\$ 57,173	\$ 58,834	\$ 60,464

Source: Hunden Strategic Partners

Direct, Indirect & Induced Spending to the Dublin (2005) - Sports Complex												
	Year 1	Year 2	Year 3	Year 4	Year 5	Year 6	Year 7	Year 8	Year 9	Year 10	Year 11	Year 12
Direct	\$ 17,774	\$ 21,145	\$ 34,297	\$ 39,460	\$ 46,330	\$ 49,209	\$ 52,322	\$ 53,891	\$ 55,558	\$ 57,173	\$ 58,834	\$ 60,464
Indirect	\$ 4,896	\$ 6,146	\$ 10,117	\$ 12,388	\$ 14,594	\$ 15,894	\$ 16,894	\$ 17,494	\$ 18,094	\$ 18,694	\$ 19,294	\$ 19,894
Induced	\$ 3,764	\$ 4,477	\$ 7,226	\$ 8,362	\$ 9,816	\$ 10,441	\$ 11,091	\$ 11,421	\$ 11,766	\$ 12,119	\$ 12,481	\$ 12,841
Total	\$ 26,434	\$ 31,817	\$ 51,641	\$ 62,210	\$ 70,730	\$ 75,544	\$ 80,707	\$ 82,406	\$ 85,348	\$ 88,167	\$ 90,819	\$ 93,200

Source: Hunden Strategic Partners

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Summary of Impacts

Over 30 years the Project is expected to generate more than \$3.2 billion in net new spending, \$1.39 billion in net new earnings and 841 net new full-time equivalent jobs.

Over 30 years, the City of Dublin will experience an additional \$40.6 million in income tax and hotel accommodations tax.

HSP assumed that two percent of the projects total labor and materials would be sourced from within Dublin.

30-Yr. Summary of Impacts - Sports Complex	
Net New Spending	(millions)
Direct	\$2,009
Indirect	\$779
Induced	\$150
Total	\$3,214
Net New Earnings	(millions)
From Direct	\$955
From Indirect	\$279
From Induced	\$181
Total	\$1,394
Net New FTE Jobs	Actual
From Direct	538
From Indirect	209
From Induced	113
Total	841
Capitable City Taxes	(millions)
Income Tax - City (0.5%)	\$27.9
Hotel Tax - City (0.5%)	\$27.2
Total	\$40.6
Capitable Local Total	\$40.6
Construction Impact	\$6.0
Total	\$46.6

Source: Hunden Strategic Partners

Construction Impacts - Outdoor Sports Complex	
Development Cost	(millions)
Labor (40%)	\$19,760
Materials (60%)	\$25,020
Total	\$44,780
% Labor in Dublin	2%
% Materials in Dublin	2%
Taxes Generated (\$Bn)	118
Income Tax - City (0.5%)	11
Hotel Tax - City (0.5%)	11
Total	22
Construction Impacts - Indoor Sports Complex	
Development Cost	(millions)
Labor (40%)	\$14,450
Materials (60%)	\$19,050
Total	\$33,500
% Labor in Dublin	2%
% Materials in Dublin	2%
Taxes Generated (\$Bn)	118
Income Tax - City (0.5%)	11
Hotel Tax - City (0.5%)	11
Total	22

Source: Hunden Strategic Partners

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Project Cost Estimates

Convergence Design provided estimated construction costs for the Project.

Phase I includes the installation of multipurpose turf fields, the renovation of all grass fields and diamonds, new parking infrastructure, new restrooms and concessions, site work and landscaping.

Phase II includes the construction of the indoor event facility. Additionally, costs are provided for the option in Phase II to include the retractable seating within the indoor event facility.

Dance Fields Redevelopment Project Costs			
Phase I	Item Description	Const. Costs	Soft Costs
Phase I	Multipurpose Artificial Turf Field	\$ 26,613,120	\$ 4,121,018
	Softball Grass Field (new)	\$ 716,920	\$ 164,892
	Soccer Grass Field (new)	\$ 18,075,000	\$ 4,187,250
	Parking (new)	\$ 5,122,500	\$ 1,178,175
	New Restrooms & Concessions	\$ 1,359,000	\$ 312,570
Phase II	Urban Streets & Landscaping	\$ 2,000,000	\$ 465,000
	Phase II Total	\$ 53,864,540	\$ 12,364,965
Phase II	Event Space	\$ 25,920,000	\$ 5,961,600
	Circulation & Support	\$ 28,512,000	\$ 6,557,760
	Phase II Total	\$ 54,432,000	\$ 12,519,360
	Project Total (Phase I & Phase II)	\$ 108,316,540	\$ 24,913,265
	Retractable Seating Option	\$ 5,805,000	\$ 1,325,150
	Total Indoor with Retractable Seating	\$ 60,237,000	\$ 13,844,510

Source: Convergence Design

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Hunden Strategic Partners is a full-service real estate development advisory practice specializing in destination assets.

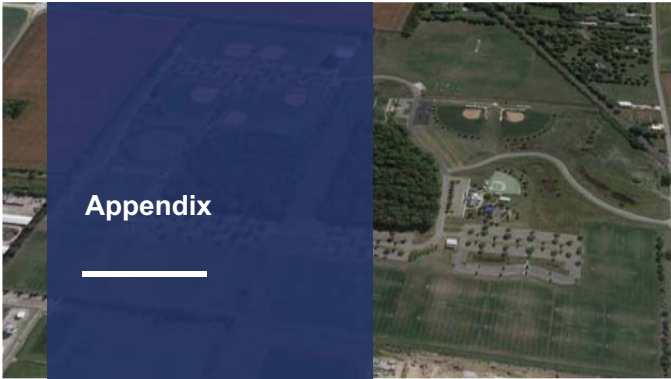
With professionals in Chicago, San Diego, Indianapolis and Minneapolis, HSP provides a variety of services for all stages of destination development in:

- Real Estate Market & Financial Feasibility
- Economic, Fiscal & Employment Impact Analysis (Cost/Benefit)
- Organizational Development
- Public Incentive Analysis
- Economic and Tourism Policy/Legislation Consulting
- Research & Statistical Analysis
- Developer Solicitation & Selection

The firm and its principal have performed more than 750 studies over the past 20 years, with more than \$5.5 billion in built, successful projects.

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Darree Fields Situation & Project Overview

One avenue that has potential within Dublin is youth sports tourism. The city has previously hosted several tournaments for various sports, however, due deteriorating grass surfaces, a lack of facilities with the capability to host regional tournaments and growing regional competition, tournament activity has slowed within the city, leading to lost business for hotels and decreased spending within Dublin's economy.

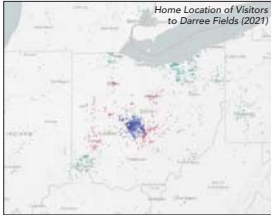
On behalf of the City of Dublin, Visit Dublin (Client) hired Hunden Strategic Partners (Hunden) to complete a sports market demand, financial feasibility study, as well as an economic and fiscal impact study, to determine the optimal uses for a youth sports facility in Dublin, Ohio. Darree Fields, a 151-acre park, is the primary site in focus for a potential youth sports destination in Dublin. The City of Dublin recently purchased two plots adjacent to Darree Fields, adding roughly 94 acres of space to expand the park.

The scope of the study includes an analysis of the market to support the proposed mix of uses in a new facility located at Darree Fields. The Project is intended to reinvigorate Darree Fields, which currently serves Dublin as the largest park for sports, recreation and cultural uses.



Darree Fields Visitation

Darree Fields busiest weekend in 2021 occurred in May, when Dublin hosted the Ohio State Cup Finals. In 2021, nearly 20 percent of visitation came from beyond 75 miles, but the map shows that most of this visitation came from within the state.



Darree Fields - Dublin, OH					
January 2021 - December 2021					
Total Visits		Total Unique Customers		Avg. Visits per Customer	
Visitor Origins by Distance from Site	Est. Number of Visits	Percent of Total Visits	Est. Number of Customers	Percent of Total Customers	Avg. Visits per Customer
Locals - Within 25 miles	58,380	27%	71,080	58%	4.39
Regional Distance - Between 25 and 75 miles	41,280	19%	71,080	58%	2.85
Long Distance only - Over 75 miles	95,340	44%	88,200	72%	1.89
Total Visits	195,000	100%	130,360	100%	3.28

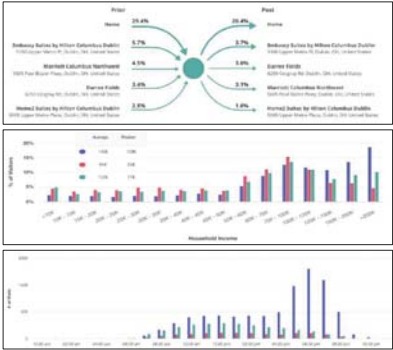


Darree Fields Visitation Weaknesses & Opportunities

The top graphic shows prior and post visitation from visitors to Darree Fields. Due to the large proportion of in-state visitors, roughly 30 percent of visitors travel from home to Darree Fields and 20 percent return home prior to sporting activity. In order to maximize sports tourism in Dublin, the Project must develop the facilities to attract visitors from the region that would require more overnight stays and generate hotel room nights for Dublin.

For the visitors that are staying in Dublin's hotels, people often return to their hotels after leaving. The individuals have high average incomes with disposable income to spend within Dublin. Supporting commercial assets around Darree Fields provides dining and entertainment options adjacent to the fields that would improve the economic impact of sports tourism within Dublin.

Without lighted turf surfaces, time for tournament scheduling at Darree is limited by daylight. The addition of lighted fields would allow for longer available field time for existing teams and the ability to add more teams to tournaments.





Dublin, Ohio Situational Overview

Dublin is consistently ranked by Business Insider as one of the top 50 cities to live in the nation due to its quality of life, safety and public education system. Dublin City Schools are a strong attraction for residents, consistently ranking among the top Ohio high schools with an average ACT score of 25.5, highest of any Ohio district with over 10,000 enrolled students.

According to the city, Dublin is home to more than 20 corporate headquarters and 4,300 businesses. Prior to the COVID-19 pandemic, Dublin's hotel room nights were driven by corporate travel. Since the pandemic, corporate travel has slowed, and the city has turned to other avenues for economic development and tourism.

From an economic development perspective, Dublin is known for its use of tax increment financing (TIF), Dublin Broadband (high speed internet connectivity) and green initiatives.

The city's main source of funding comes from income tax revenues. 75 percent of which are allocated to the city's general fund and 25 percent of which is allocated to the city's Capital Improvements Program. Dublin has achieved a AAA bond rating, providing the city with a strong tax basis for financing projects.



Bridge Park  
Certificate

An example of Dublin's economic development efforts can be seen in the Bridge Park Mixed-Use Development that utilized TIF to fund public infrastructure improvements necessary for the project's completion.

Bridge Park is one of Dublin's most important economic development projects. The mixed-use district includes:

- AC Hotel by Marriott – 150 keys & rooftop restaurant/bar
- Office – 325,000 square feet
- Retail – 200,000 square feet
- Residential – 528 for-rent units, 106 for-sale units
- Event Center – 19,000 square feet of conference space
- Riverside Crossing Park – waterfront development and pedestrian bridge

As a part of the original plans for Bridge Park, the developer, Crawford Hoying, and the Dublin Convention and Visitors Bureau engaged UC Economics Center to conduct a feasibility study for the Bridge Park Fieldhouse. The fieldhouse was proposed as an indoor, multi-sport complex and events center that could support eight basketball courts and 16 volleyball courts.

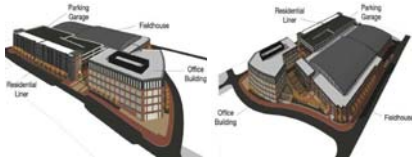


Why Does the Bridge Park Fieldhouse Matter?

The City of Dublin and Crawford Hoying identified the potential for an indoor facility to host major amateur sports events and tournaments within the city. Currently, The greater Columbus area does not have a facility of the proposed size of the fieldhouse.

Ultimately, the efforts to develop the fieldhouse were halted for a variety of reasons. The financial gap of the project was never addressed with the city to assist in a public-private partnership to fund the project, the project's site within the mixed-use district created parking and logistical problems for the development and the COVID-19 pandemic resulted in lack of progress for the project.

The resulting efforts of the proposed project identified the opportunity for Dublin to fill a gap in the market for a multi-use facility to attract youth sports activity, ticketed shows and community events.



Local Overview



Darree Fields

Location: Dublin, OH  
Owner: Public  
Operator: Dublin Parks and Recreation  
Sports Features:

- 18 Outdoor Grass Fields
- 7 Diamonds

Notes:  
Darree fields is one of the largest parks with over 151 acres and is home to the Art in Public Places Project "Going, going... Gone!" This bronze sculpture marks the passage of time through the imagery of baseball. Darree Fields is the main outdoor athletic hub in Dublin also offering four shelter houses, Nando's Dog Park, The Miracle League Field, The Miracle League Playground, a nature area, community garden, and a regular playground. Darree Fields hosts practices, games and tournaments within Dublin, but frequent usage over time has led to the deterioration of available athletic fields and diamonds leading to loss of activity and sports tourism within Dublin.



Economic, Demographic, and Tourism Analysis



Dublin, located in central Ohio, is directly accessible by US33/SR 161 and I-270, approximately a 20-minute drive to downtown Columbus.

Dublin is centrally located within Ohio, serving as a midpoint between Toledo, Cleveland and Cincinnati. Beyond Ohio, Dublin and Columbus serves as a midpoint between Indianapolis, Pittsburgh and Louisville. The Project's location provides strong potential to become a regional hub for youth sports activity.



When evaluating the potential for a youth sports complex, economic and demographic attributes are evaluated within one-, three- and five-hour drive times to gauge the potential to attract visitation to the facility. Dublin is located in central Ohio, which gives the Project a strong strategic potential to attract visitation from major Midwestern markets such as Columbus, Cleveland, Cincinnati, Indianapolis, and Pittsburgh. The population within a five-hour drive time of Dublin is over 100 million, providing the Project with a significant potential visitation base.

	1-Hour	3-Hour	5-Hour
Population	2,462,687	16,921,914	36,338,483
Households	974,294	6,882,081	14,730,530
Median Household Income	\$70,860	\$62,488	\$62,167
Median Home Value	\$232,954	\$188,818	\$190,152
Median Age	37.7	40.2	40.6

Source: ESRI



Dublin's population has increased from 2010 to 2020 and is projected to continue to do so through 2027. Between 2020 and 2020, Franklin County and Dublin saw 13.8 percent and 18.7 percent growth in population, respectively. Growth in the northwest Columbus metro area indicates the desire to live in the area for residents currently in the metro and newcomers to the area. As population continues to increase, additional community assets in the Dublin area will need to be introduced to support demand for youth sports participation.

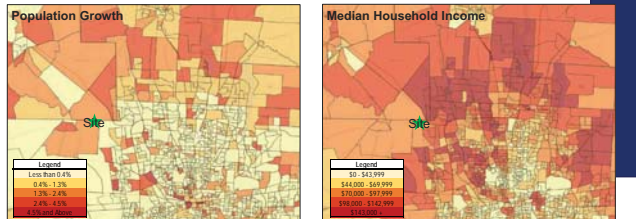
	Population and Growth Rates				Percent Change 2010 - 2020
	2010	2020	2022	2027 Projected	
United States	308,745,538	371,446,201	326,707,897	339,702,761	7.4%
Ohio	11,536,504	11,799,448	11,820,906	11,820,083	2.3%
Columbus	2,397,842	2,624,142	2,668,731	2,720,593	9.4%
Franklin County	1,163,414	1,323,807	1,354,579	1,383,219	13.8%
Dublin	41,554	49,328	50,501	51,474	18.7%

Source: U.S. Census Bureau

Category	United States	Charlotte	Franklin County	Dublin
Household size, 2020	44.4%	66.7%	51.8%	75.8%
Median value of owner-occupied housing units, 2016-20	\$29,800	\$151,400	\$186,900	\$194,500
Persons per household, 2016-20	2.60	2.41	2.46	2.83
Median household income, 2016-20	\$64,994	\$98,116	\$62,352	\$138,172
Persons below poverty level, percent	17.6%	12.6%	17.4%	2.9%
Total employment, 2020	134,163,349	4,970,126	627,835	—
Total employment, percent change, 2019-2020	0.9%	1.3%	0.4%	—

Source: U.S. Census Bureau

The maps below illustrate the projected annual population growth rate from 2022 to 2027 and the 2022 median household income by block in the Dublin area. Dublin's growth is relatively stagnant, however, there is strong growth near the Project site heading northwest along route 33 to Marysville and in northern Columbus into Delaware, creating more demand for sports facilities near the Project site. Dublin and other cities north of Columbus have high median household incomes, indicating the ability to support high fees associated with competitive youth sports programs.



- The largest industries by employment in Dublin are state and local government and health care. State and local governments represent over 10 percent of the workforce.
- The Dublin area is specifically known for being the Headquarters for several Fortune 500 companies such as Cardinal Health and Endo.
- The potential for additional H1 moves to Dublin will help increase employment and additional office supply in the market.



Franklin County, OH Employment by Industry - 2020			
	Occupations	Employers	Percentage of Total
for the County in Dublin are state and local and local governments represent	Total employment (number of jobs)	452,050	100%
	By type		
	Food and lodging employment	790,130	52.51%
	Preparation employment	92,257	23.27%
	By industry		
	Farm employment	92,257	5.86%
	Non-farm	830,793	56.65%
	Private nonmanufacturing employment	831,561	57.12%
	State and local government	452,050	29.46%
	Nonstate and nonlocal government	389,539	25.49%
for the County in Dublin will help increase to Dublin will help increase in the market.	Health and medicine	12,608	2.76%
	Arts and recreation	17,823	3.95%
	Professional, scientific, and technical services	12,270	2.72%
	Construction and contracting	7,404	1.64%
	Administrative and support services management and innovation services	6,636	1.47%
	Communication and information	5,529	1.22%
	Other services (not in government and government enterprises)	4,485	1.00%
	Education	4,219	0.93%
	Real estate and rental and leasing	40,270	8.92%
	Transportation and warehousing	24,914	5.51%
	Wholesale trade	12,934	2.87%
	Manufacturing, engineering and electronics	24,764	5.48%
	Food services	38,194	8.45%
	Local government	1,700	0.38%
	Art, entertainment, and recreation	15,790	3.50%
	Health care	8,399	1.86%
	Mining, quarrying, and oil and gas extraction	481	0.11%
	Finance, insurance, and real estate services	481	0.11%
for the County in Dublin will help increase to Dublin will help increase in the market.	Total state and local government	18,161	4.02%
	State and local	12,458	2.76%
	State government	7,470	1.65%
	Local government	5,000	1.11%
	Education	1,140	0.25%
	Military	1,140	0.25%

- The Dublin area is home to a number of academic institutions, with The Ohio State University-Main Campus being less than 10 miles away.
- Education levels in Dublin are much higher than state and national averages with 79.2 percent of residents obtaining a college degree.
- Youth sports facilities are often supported by college students through refereeing, affordable coaching roles and volunteering efforts. With a strong collegiate presence in the surrounding area, Dublin has a strong base of potential employees for the Project.

Population Age 25+	Educational Attainment - 2021			
	United States	Ohio	Franklin County	Dublin
Did Not Complete High School	11.5%	9.8%	9.0%	2.6%
Completed High School	26.7%	33.3%	24.8%	7.3%
Some College	20.3%	20.5%	19.9%	10.9%
Completed Associate Degree	8.6%	8.6%	7.0%	4.0%
Completed Bachelor Degree	20.2%	17.3%	24.8%	43.2%
Completed Graduate Degree	12.7%	10.5%	14.5%	32.0%

Source: U.S. Census Bureau

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attribution

SP performed a tapestry segmentation analysis which classifies neighborhoods using 11 uni-ue segments based not only on demographics but also on socioeconomic characteristics.

- The top five segments in Dublin, OH are Professional Pride, Entertaining Professionals, Top Tier, Old and Newcomers, and Urban Chic.
- Understanding the segmentation profile of the Dublin area helps to better understand how this project can impact various types of residents.

Dublin ESRI Tapestry Segmentation				
Rank	Segment	Median Age	Median Household Income	Percentage
1	Professional Pride (16)	40.8	\$138,100	31.2%
2	Entertaining Professionals (20)	35.1	\$86,600	29.0%
3	Top Tier (1A)	47.3	\$173,200	8.5%
4	Old and Newcomers (BF)	39.4	\$44,900	7.7%
5	Urban Chic (2A)	43.1	\$109,400	7.2%
Average Total		41.2	\$110,440	83.7%

Source: ESRI

## Tapestry Segmentations

- The Professional Pride segment is the largest, making up 31.2 percent of the Dublin market. The average household size of this segment is 3.13, indicating families with children. A high population of this segment is important for potential youth sports developments, providing a strong potential local user base.
- This segment is well-educated career professionals, with a median age of about 41 years and commonly works in science, technology, law or finance. Median incomes within the segment are \$138,100.
- Homes are valued at more than twice the US median home value and have one of the highest household incomes.

**Professional Pride**

Household: 1,162,300  
Average Household Size: 3.13  
Median Age: 40.8  
Median Household Income: \$138,100

**WHO ARE WE?**

Professional Pride residents are well-educated career professionals that have prospered through the Dublin economy. To prosper they work in science, technology, law or finance. They are committed to their careers and their families. They are also committed to their communities and are active in their neighborhoods. They are well-educated and have a high level of income. They are also committed to their families and are active in their neighborhoods. They are well-educated and have a high level of income. They are also committed to their families and are active in their neighborhoods.

**OUR NEIGHBORHOOD**

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## Tapestry Segmentations

- The Bright Entertaining Professionals segment accounts for 29 percent of the Dublin market.
- This segment is well-educated and climbing the ladder in STEM occupations with a median age of about 35 years.
- The market is fast-growing, located in lower-density diverse neighborhoods of large metro areas.
- This young segment makes over one and a half times more income than the US median, supplementing their income with investments

**Entertaining Professionals**

Household: 1,737,200  
Average Household Size: 2.48  
Median Age: 35.1  
Median Household Income: \$86,600

**WHO ARE WE?**

Entertaining Professionals are well-educated and climbing the ladder in STEM occupations with a median age of about 35 years. They are well-educated and have a high level of income. They are also committed to their families and are active in their neighborhoods. They are well-educated and have a high level of income. They are also committed to their families and are active in their neighborhoods.

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## Tapestry Segmentations

- Top Tier, the wealthiest Tapestry segment accounts for 8.5 percent of the Dublin market.
- This well-educated segment has an average accumulated net worth of over \$3 million dollars.
- These professionals have reached their corporate career goals and many of the older residents have moved into consulting roles or operate their own businesses.

**Top Tier**

Household: 2,113,000  
Average Household Size: 2.84  
Median Age: 47.3  
Median Household Income: \$173,200

**WHO ARE WE?**

Top Tier residents are well-educated career professionals that have prospered through the Dublin economy. To prosper they work in science, technology, law or finance. They are committed to their careers and their families. They are also committed to their communities and are active in their neighborhoods. They are well-educated and have a high level of income. They are also committed to their families and are active in their neighborhoods. They are well-educated and have a high level of income. They are also committed to their families and are active in their neighborhoods.

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## Local Tourism Overview

- Dublin is home to numerous tourism attractions and hosts annual festivals and events that pull tourists nationwide.
- The Dublin Irish Festival is the largest 3-day Irish festival in the world, offering seven stages of rotating entertainment, cultural experiences, workshops, shopping, Gaelic games, and more.
- Dublin is ranked one of the top ten cities to celebrate St. Patrick's Day and hosts The Memorial Tournament, one of the most prestigious Professional Golf Association (PGA) tournaments in the country.

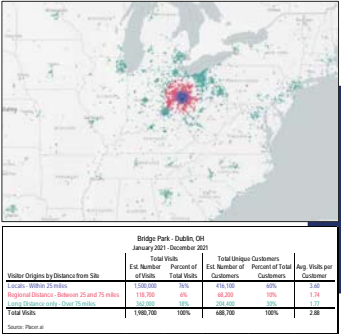
Dublin Most Visited Attractions - 2021					
Rank	Attraction Name	Distance from Site (Miles)	2021 Visitors	2021 Total	Avg. Visits Per Customer
1	Bridge Park	8.1	400,000	1,900,000	2.37
2	Columbus Zoo	8.7	185,200	1,400,000	1.40
3	Quaker Dublin Center	4.4	280,100	576,100	2.12
4	Chiller Dublin	1.0	94,200	427,600	4.56
5	Urban Air Trampoline and Adventure Park	1.6	96,600	108,000	1.68

Source: Venues



## Bridge Park

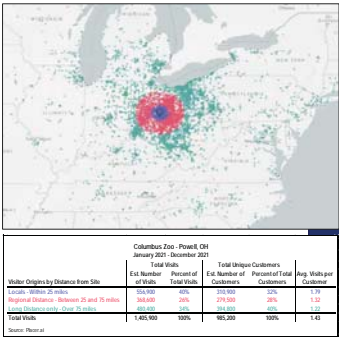
- Geofencing data collected from Placer.ai shows that approximately three-fourths of visitors came from the local area in 2021, while about 20 percent come from over 75 miles away.
- Bridge Park has a strong pull from long distance visitors, with a majority coming from Cincinnati, Cleveland and Pittsburgh while reaching as far as Minneapolis, Dallas and Atlanta.





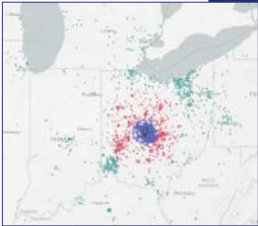
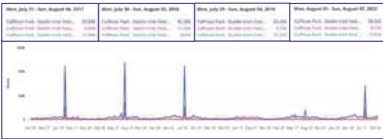
Columbus Zoo

- Geofencing data collected from Placer.ai shows that approximately 32 percent of unique visitors came from the local area in 2021, while a sizeable 40 percent come from over 75 miles away.
- The Columbus Zoo has a strong pull from long distance visitors, with a majority coming from the Cleveland, Cincinnati, and Pittsburgh areas.



Indianapolis Zoo Festival

- Geofencing data collected from Placer.ai shows the annual regional draw of the nationally recognized Irish Festival.
- The festival has a strong pull from long distance visitors, with a majority coming from the Cleveland, Cincinnati, Chicago, and Pittsburgh areas.



Implications

- Dublin's location in central Ohio creates an ideal meeting space for youth sports connecting the surrounding cities such as Cleveland, Toledo, Cincinnati, Indianapolis, and Pittsburgh.
- Dublin's growing population, high incomes, and large average family sizes will complement a new youth sports facility with lots of users.
- Dublin's reachable population within a 5-hour drive is over 3.1 million people. This will provide the Project with a significant potential visitation base and the ability to host national youth sports Tournaments.
- Dublin's emphasis on economic development will assist in growing the city's corporate presence and tourism attractions.



Local Indoor/Outdoor Sports Market Analysis

Facility Trends and Standards

Youth sports facilities have become dynamic assets that need to meet the following criteria to maximize revenues, utilization and efficiency.

Multi-purpose	Strong Amenities	Playing Surfaces	Other Sports & Play Areas
<p>Whether it be an indoor or outdoor facility, multi-purpose usage is becoming a necessity at all facilities. It is important for facility developers and sites to listen and understand all potential user groups to capture as much usage out of a potential facility as possible.</p> <p>It is common to see facilities with easily changeable times, overlapping fields, side training areas, peripheral dynamic spaces, and other small features that can elevate a facility to the next level.</p>	<p>Facilities have continued to up their game with creative on-site amenities for both players and spectators: comfortable viewing areas, higher-end concessions or restaurants, play areas for children, training spaces, skate parks, entertainment spaces, and much more.</p> <p>A strong mix of off-site amenities including food and beverage, grocery stores, restaurants, hotels and entertainment attractions is critical to the viability of youth sports venues.</p>	<p>Tournament caliber facilities across the country are continually elevating the standard when it comes to playing surfaces. Whether it be a mixture of artificial turf and grass, fully artificial or the introduction of one championship artificial field, these options increase the tournament pull to a facility while benefiting the local residents.</p> <p>The same can be said for indoor facilities which must have adequately sized courts, enough space between courts for viewers, and contain surrounding warm up spaces for teams and players.</p>	<p>Facilities have begun introducing new spaces for non-traditional sports such as Pickleball, Cricket, Cornhole, and many others to increase versatility and cater to resident desires.</p> <p>These spaces can be multi-purpose spaces and accommodate a variety of uses, however being able to offer these both to tournament visitors and local residents is important.</p> <p>Some facilities have begun to offer e-sports area, or high-end children's play structures to entertain the brothers and sisters of players.</p>

Local Facility Analysis



Local Sports Facility Analysis

Dublin has limited offerings of indoor and outdoor sports facilities. Dublin's two largest parks include Avery Park and Darree Fields to support outdoor sports for Dublin Youth Athletics (DYA) programs and club teams within Dublin. Dublin's growing population has proven that the number of fields at these parks is far below the necessary number of fields needed to support the 4,300 youth participants in the DYA program and Dublin's numerous club teams for soccer, lacrosse, baseball and softball.

Outside of Dublin, within 20 miles many of the athletic facilities are managed by various city's parks and recreation departments including Hilliard, Westerville, Marysville and Columbus.

The local market is currently underserved in indoor and outdoor turf multi-purpose fields. The two outdoor turf fields in the local supply are located at the Ohio Premier Soccer Complex, a privately owned facility developed by a travel soccer club.

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Local Youth Sports Facility Supply									
Facility Name	Location	Distance from Site (Miles)	Baseball	Softball	Soccer Turf Field	Soccer Field	Baseball/Softball Field	Other	Notes
SportsOhio	Dublin	0.9	1	2	5	-	-	25	-
Bo Jackson Elite Sports Development	Hilliard	1.5	-	-	2	-	-	2	-
City Individual Training Center	Plain City	2.1	-	3	-	-	-	-	-
Avery Park	Dublin	4.4	-	-	-	-	16	9	-
Hilliard Soccer Complex & Reynolds Municipal	Hilliard	4.9	-	-	-	-	24	8	-
Ohio Sports Plaza	Dublin	6.1	4	-	-	-	-	-	-
Westwood Fieldhouse	Hilliard	6.6	2	4	-	-	-	-	-
Everett Fields	Dublin	7.2	-	-	-	-	-	3	1
Ohio Premier Soccer Club	Plain City	7.4	-	-	-	2	3	-	-
Greater Columbus Volleyball Club	Westerville	12.8	-	4	-	-	-	-	-
North Columbus Sports Inc.	Columbus	11.8	-	-	-	-	-	7	-
Antares Soccer Sports Park	Columbus	12.9	4	8	-	-	1	8	-
FieldhouseUSA	Columbus	12.7	5	8	-	-	-	-	-
Westerville Sports Complex	Westerville	16.2	-	-	-	-	9	-	-
Big Bear Athletic Complex	Columbus	17.5	4	8	-	-	-	-	-
Union County Sports Complex	Marysville	17.9	-	-	-	-	11	8	1
Lackawanna Athletic Complex	Columbus	19.5	4	8	-	-	-	35	-
Wilks Athletic Complex	Columbus	22.9	4	8	-	-	-	-	-
Darree Fields	Dublin	-	-	-	-	-	10	2	1
Total Average		16.5	28	53	7	2	106	85	3

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Local Sports Facility Map

Darree Fields is located roughly two miles from U.S. Route 33 and 3.5 miles from I-270. The majority of sports facilities in northern Columbus are situated near I-270 and the major highways in the metro area for easy accessibility.

Dublin is surrounded by public and privately owned indoor and outdoor facilities. The following section will profile the most relevant facilities within the local market.



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Indoor Facilities

FieldhouseUSA

Columbus, OH

Owner: Private

Operator: Private

Sports Features:

- 5 basketball Courts
- 8 Volleyball Courts
- Cheer & Dance Institute

Notes:

FieldhouseUSA is based in Frisco, Texas and has locations in Texas, Ohio, Colorado and Washington. The Columbus location is home to one of the largest club volleyball organizations, Minnetonka Sports, which is a member of the Ohio Valley Region of USA Volleyball. The facility is also a main location for Bleacher Republic, a local AAU basketball tournament operator. Throughout the 2022 season, eight volleyball tournaments were hosted at the facility.

Currently, there are 10 AAU basketball tournaments scheduled at the facility through July of 2023.



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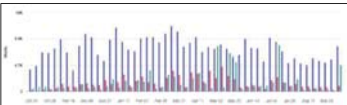
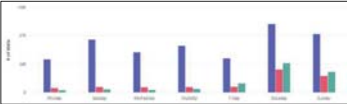
FieldhouseUSA Visitation

Interviews with local AAU volleyball organizations revealed that Fieldhouse USA is a popular destination in Columbus for smaller volleyball tournaments. In the past 12 months, the facility has attracted visitation from the major cities in Ohio, as well as Pennsylvania, West Virginia, Indiana and Michigan.



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FieldhouseUSA - Columbus, OH Last 12 Months (October 2021 - October 2022)					
Visitor Origin by Distance from Site	Total Visits		Total Unique Customers		Avg. Visits per Customer
	Est. Number of Visits	Percent of Total Visits	Est. Number of Customers	Percent of Total Customers	
Locals: Within 25 miles	20,000	17%	10,000	55%	4.12
Regional Distance: Between 25 and 75 miles	78,500	14%	37,000	20%	2.12
Long Distance: Over 75 miles	44,000	17%	40,000	25%	1.10
Total Visits	142,500	100%	147,000	100%	3.08



Bo Jackson Elite Sports (BJES)

Location: Hilliard, OH

Owner: Private

Operator: Private

Sports Features:

- Full size major league, turf infield
- 2 indoor multi-use turf fields (convertible to a softball infield)
- 8 batting cages
- 3 pitching tunnels
- 20,000 square foot sports performance training center
- 80-yard, 3 lane indoor track

Notes:

The BJES is a total of 114,000 square feet and offers amenities to host a wide array of sports including baseball, softball, soccer, football and lacrosse. The facility focuses on hosting practices, training camps and player development clinics.



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## Bo Jackson Elite Sports Visitation

In 2021, 81 percent of visitation to the facility came from within 25 miles. As an indoor training facility, B.J. S does not attract much visitation outside of Ohio and mainly attracts athletes within Columbus and Dayton. Visitation throughout 2021 shows that in the warmer months between March and October, the facility does not attract strong visitation and was much busier over the winter months for indoor activity.



Bo Jackson Elite Sports - Hilliard, OH January 2021 - October 2021					
Visitor Origins by Distance from Site	Total Visits	Total Unique Customers	Avg. Visits per Customer		
Locals - Within 25 miles	275,100	67%	33,300	66%	5.28
Regional Distance - Between 25 and 75 miles	35,400	18%	9,100	68%	3.00
Long Distance - Over 75 miles	27,900	15%	7,500	74%	3.20
Total Visits	338,400	100%	50,000	100%	4.67



## Westwood Fieldhouse

Location: Hilliard, OH

Owner: Private

Operator: Private

Sports Features:

- 2 basketball Courts
- 4 Volleyball Courts

Notes:

The Westwood Fieldhouse was opened in 2020 by a private operator and the founder of the Mid-Ohio Pumas AAU basketball team that is sponsored by Adidas. The courts are available for rent for \$10 per hour to the public.

In an article from The Columbus Dispatch, the owner of the Project was quoted saying, 'While there remains a need for a larger facility that could host regional tournaments, this project is a way for us to dip our toes in something smaller and size up demand.' The Project was a result in the organization struggling to find free gym space that had been rented from Columbus Parks and Recreation facilities in the past.

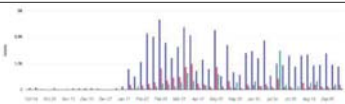


## Westwood Fieldhouse Visitation

The Westwood Fieldhouse is the highest quality indoor facility in the local market, but with a maximum of two basketball courts or four volleyball courts, the facility does not have the scale to host regional tournaments, however visitation from beyond 25 miles increases on the weekends suggesting that the facility hosts showcase tournaments or rents courts to tournament operators.



Westwood Fieldhouse - Hilliard, OH Last 12 Months (October 2021 - October 2022)					
Visitor Origins by Distance from Site	Total Visits	Total Unique Customers	Avg. Visits per Customer		
Locals - Within 25 miles	76,400	73%	18,200	65%	4.20
Regional Distance - Between 25 and 75 miles	15,800	18%	5,400	28%	2.75
Long Distance - Over 75 miles	12,800	9%	3,400	15%	2.50
Total Visits	105,000	100%	27,000	100%	3.70



## Greater Columbus Volleyball Club

Location: Worthington, OH

Owner: Private

Operator: Private

Sports Features:

- 4 Volleyball Courts (21,000 square feet)

Notes:

The Greater Columbus Volleyball Club was founded in 2011 when a private owner purchased the Columbus Volleyball Academy's assets. The facility is home to a club team that participates in AAU and USA Volleyball tournaments. The club typically has between 20 and 24 teams under its banner between the age groups of 11 and 18. Interviews with ownership of the facility say that the facility is necessary to the clubs existence because it is too difficult to coordinate court times with the lack of supply in the market. Having their own facility allows them to avoid dealing with schools and other private facilities in the market.

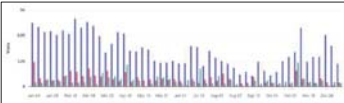


## Greater Columbus Volleyball Club Visitation

In 2021, 12 percent of visitation to the facility came from within 2 miles. Visitation beyond 2 miles was highest on Saturdays and Sundays, suggesting weekend tournament play and visitation from within Ohio. The visitation map shows a good example of the locational importance of Columbus' central position within the state.



Greater Columbus Volleyball Club - Worthington, OH January 2021 - December 2021					
Visitor Origins by Distance from Site	Total Visits	Total Unique Customers	Avg. Visits per Customer		
Locals - Within 25 miles	125,300	57%	45,300	57%	2.60
Regional Distance - Between 25 and 75 miles	26,200	16%	17,600	25%	1.40
Long Distance - Over 75 miles	20,500	12%	14,800	18%	1.30
Total Visits	172,000	100%	77,700	100%	2.20



## Elite Volleyball Training Center

Location: Plain City, OH

Owner: Private

Operator: Private

Sports Features:

- 3 Volleyball Courts
- Performance Training Center

Notes:

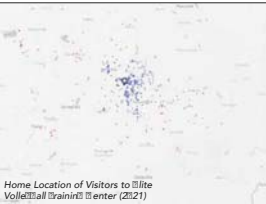
The Elite Volleyball Training Center hosts volleyball camps, clinics, personal training sessions and leagues. The facility also serves as the home facility for a competitive club team with age groups from 10 through 18.



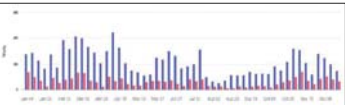
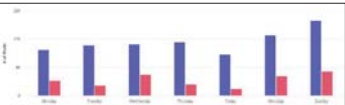


Elite Volleyball Training Center Visitation

In 2021, the facility received over 143,000 visits from 11,800 visitors (an average of 12 visits per person). Since the complex is home to a volleyball club team and hosts trainings, the facility attracted many of the same visitors throughout 2021. With three courts, the facility is not utilized as a tournament facility in the local market.



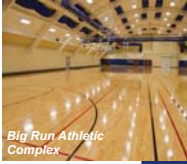
Visitor Origins by Distance from Site	Elite Volleyball Training Center - Plain City, OH January 2021 - December 2021				Avg. Visits per Customer
	Est. Number of Visits	Percent of Total Visits	Est. Number of Customers	Percent of Total Customers	
Locals: Within 25 miles	11,400	7%	10,000	85%	10.4
Regional: 25 to 50 miles	1,000	1%	1,000	8%	1.0
Long Distance: Over 50 miles	12,800	88%	700	6%	18.6
<b>Total Visits</b>	<b>143,200</b>	<b>100%</b>	<b>11,800</b>	<b>100%</b>	<b>12.1</b>



Columbus Parks & Recreation

HSP used Placer.ai to analyze facilities operated by the Columbus Parks and Recreation Department. Columbus Parks and Recreation operates multiple facilities with four basketball courts. The Bill McDonald Athletic Fieldhouse is located within the Anheuser Busch Athletic Complex, which also has eight baseball diamonds and an outdoor grass field. The following bullets show visitation statistics for each of the facilities.

- Anheuser Busch Sports Park (2021):** 166,600 visits; 45,300 visitors (82% within 25 miles)
- Big Run Athletic Complex (2021):** 7,100 visits; 3,800 visitors (82% within 25 miles)
- Willis Athletic Complex (2021):** 11,000 visits; 4,100 visitors (86% within 25 miles)
- Cleo Dumaree (2021):** 13,100 visits; 5,200 visitors (83% within 25 miles)



SportsOhio

**Location:** Dublin, OH  
**Owner:** Private  
**Operator:** Private  
**Sports Features:**

- 1 Basketball Court
- 2 Volleyball Courts
- 5 Indoor Turf Fields
- 23 Outdoor Grass Fields

**Notes:**  
SportsOhio's configurable indoor facility makes leagues of any sport attainable. The Sport Complex also features a golf center that includes a 9-hole par 3 course, over 100 premium quality grass tees, two story hitting building, and footgolf.

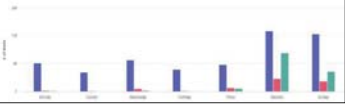


SportsOhio Visitation

In 2021, the facility received 101,000 visits from 33,800 visitors (an average of about 3 visits per person). Since the complex also offers activities such as golf and go karts, the facility attracted many of the same visitors throughout 2021. The Facility attracted the most long-distance visitors in September.



Visitor Origins by Distance from Site	SportsOhio - Dublin, OH January 2021 - December 2021				Avg. Visits per Customer
	Est. Number of Visits	Percent of Total Visits	Est. Number of Customers	Percent of Total Customers	
Locals: Within 25 miles	11,000	11%	11,000	33%	1.0
Regional: 25 to 50 miles	1,000	1%	1,000	3%	1.0
Long Distance: Over 50 miles	89,000	88%	21,800	64%	4.1
<b>Total Visits</b>	<b>101,000</b>	<b>100%</b>	<b>33,800</b>	<b>100%</b>	<b>3.0</b>



Outdoor Facilities

Avery Park

**Location:** Dublin, OH  
**Owner:** Public  
**Operator:** Dublin Parks and Recreation  
**Sports Features:**

- 16 Outdoor Grass Fields
- 9 Diamonds

**Notes:**  
Avery Park is utilized by numerous local recreational sport organizations. The supply of field space and baseball diamonds make Avery suitable to host sizeable tournaments but is limited due to a lack of accessible parking. The 73-acre park also includes a playground area, shelter house and grills, lighted tennis and basketball courts, a nature/fishing area, and recreation paths.



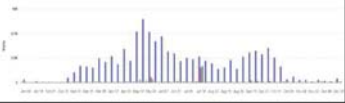
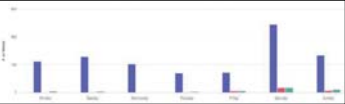


Avery Park  
Visitation

In 2021, Avery Park received over 140,000 visits from 39,500 visitors (an average of 3.5 visits per person). Avery Park mainly caters to residents of Dublin with the summer months being the most popular given the seasonality and demand for recreation fields.



Avery Park - Dublin, OH January 2021 - December 2021					
Visitor Origins by Distance from Site	Total Visits		Total Unique Customers		Avg. Visits per Customer
	Est. Number of Visits	Percent of Total Visits	Est. Number of Customers	Percent of Total Customers	
Locals - Within 25 miles	121,400	92%	22,300	57%	3.16
Regional Distance - Between 25 and 75 miles	6,400	5%	1,000	4%	1.47
Long-Distance - Over 75 miles	2,200	2%	1,200	3%	1.83
Total Visits	140,000	100%	39,500	100%	3.54



Union County Sports Complex

Location: Marysville, OH

Owner: Public

Operator: Union County Parks and Recreation

Sports Features:

- 11 Outdoor Grass Fields
- 8 Diamonds

Notes:

The Union County Sports Complex hosts a variety of tournaments and is home to numerous local youth sports organizations. The complex also offers a cricket pitch, rugby field, numerous concession areas, a walking path, and a playground. The Union County Sports Complex has future plans to add more playground areas, a dedicated lacrosse field, and additional picnic areas. The Union County Joint Recreation District hopes to fund the development with corporate and private sponsorships, as well as contributions from the three government entities.

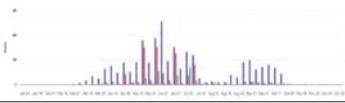
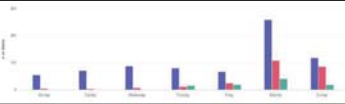


Union County Sports Complex  
Visitation

In 2021, the facility had the most visitation over the weekends and in the summer months. The sports complex mainly draws from the local community with 32 percent of the visitors traveling from over 25 miles.



Union County Sports Complex - Marysville, OH January 2021 - December 2021					
Visitor Origins by Distance from Site	Total Visits		Total Unique Customers		Avg. Visits per Customer
	Est. Number of Visits	Percent of Total Visits	Est. Number of Customers	Percent of Total Customers	
Locals - Within 25 miles	11,200	49%	24,300	55%	2.16
Regional Distance - Between 25 and 75 miles	10,000	23%	16,200	24%	1.60
Long-Distance - Over 75 miles	9,800	22%	15,000	21%	1.56
Total Visits	40,000	100%	44,500	100%	2.28

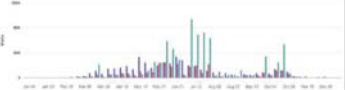
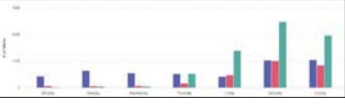


Lou Berliner Sports Park  
Visitation

Berliner Sports Park hosts some of the largest baseball and softball tournaments in the Midwest with some tournaments, including The Columbus Classic, eclipsing 100,000 visitors over a week timeframe in July. Nearly 50 percent of visitation in 2021 came from beyond 75 miles.



Lou Berliner Sports Park - Columbus, OH January 2021 - December 2021					
Visitor Origins by Distance from Site	Total Visits		Total Unique Customers		Avg. Visits per Customer
	Est. Number of Visits	Percent of Total Visits	Est. Number of Customers	Percent of Total Customers	
Locals - Within 25 miles	141,100	18%	19,400	19%	3.96
Regional Distance - Between 25 and 75 miles	240,100	32%	26,600	26%	3.46
Long-Distance - Over 75 miles	1,000,000	100%	400,000	100%	2.50



Order Construction  
Proposed Land

Illioore Sports  
Park

The Illioore Run Sports Park is currently a soccer-specific park in northeast Columbus, operated by the City of Columbus Parks and Recreation. The City of Columbus and the Major League Soccer (M.L.S.) franchise, the Columbus Crew, have announced a partnership to develop a championship soccer field, six turf fields with lighting and 7 grass fields at the park, as a part of a multi-million-dollar redevelopment of the 69-acre park. The partnership formed between the city and team is expected to dedicate fields to the Crew Academy, the club's development program for the U-15, U-17 and U-19 age groups and to provide the city with a regional destination for tournaments.

The Columbus Crew initially intended to develop the sports park near their old M.L.S. stadium, but an agreement could not be reached with the Ohio Exposition Commission, forcing the team to search for other options.





Jennings Sports Park

The Jennings Sports Park broke ground on a 56-acre sports complex at the end of September 2022. The complex is located at ...ans Farms, roughly 18 miles from Darree Fields, and is expected to include:

- 8 soccer and multi-sport fields (three FIFA Pro-certified)
- 6 baseball and softball fields
- heated batting cages
- central pavilion for concessions and restrooms

Each field is anticipated to have a synthetic turf surface with lights for year-round capabilities.

The project will be funded with private money (roughly \$50 million), with no help from public tax dollars.



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New Albany Fieldhouse

New Albany approved a new fieldhouse development in November of 2022. The fieldhouse will not require a membership and will be free for drop-in use by residents throughout the week. The project is expected to include:

- Multipurpose turf fields
- Multipurpose courts
- Batting cages
- Lounge areas
- Office space and meeting rooms

The project is intended for use by variety of programs in New Albany including after-school, daycare/preschool, active adult and senior groups, athletic camps and leagues and special events, such as corporate meetings, birthday parties and day care field trips.



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Other

Pickle and Chill

**Location:** Columbus, OH  
**Owner:** Private  
**Operator:** Private  
**Sports Features:**

- 6 Indoor Pickleball Courts
- 5 Outdoor Pickleball Courts

**Notes:**

Pickle and Chill recently opened in October 2022 and hosted a Major League Pickleball event. Phase one of the project included the 25,000 square-foot indoor space, while phase two is planned to open in spring of 2023 with the five outdoor courts.

The facility hosts open play, tournaments, leagues and lessons, but also emphasizes the food and beverage lounge and dedicated event space.



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Regional Indoor/Outdoor Sports Market Analysis

Active Sports Center

**Location:** Dayton, Ohio  
**Opened:** 2002  
**Owner/Operator:** BCS Sports LLC  
**Sports Features:**

- 4 full-size baseball diamonds with turf infields
- 4 youth sized baseball diamonds with turf infields

**Notes:**

This complex primarily hosts local and regional youth baseball tournaments and recently began a lacrosse season for youth age groups in May 2022. Prior to a tornado hitting the facility in 2019, the complex had an indoor facility with an indoor multi-purpose turf field and restroom accommodations.



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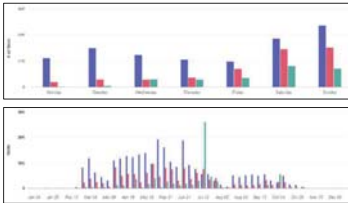


## Action Sports Center Visitation

Action Sports Center had nearly 480,000 total visits in 2021 with the majority (58 percent) coming from the local area within 25 miles. However, the outdoor sports complex had strong long-distance visitation pulling from cities such as Cleveland, Detroit, Chicago and Milwaukee.



Action Sports Center January 2021 - December 2021					
Visitor Origins by Distance from Site	Total Visits		Total Unique Customers		Avg. Visits per Customer
	Est. Number of Visits	Percent of Total Visits	Est. Number of Customers	Percent of Total Customers	
Locals - Within 25 miles	276,302	58%	56,302	51%	5.11
Regional Distance - Between 25 and 75 miles	121,302	27%	27,302	24%	4.43
Long Distance - Over 75 miles	82,396	17%	31,396	28%	2.62
Total Visits	479,999	100%	114,999	100%	4.17



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## The Athletic Field Complex at Voice of America MetroPark

Location: West Chester Township, OH

Opened: 2014

Owner/Operator: Butler County

Sports Features:

- 22 outdoor grass fields
- 2 multi-purpose lighted outdoor turf fields

Notes:

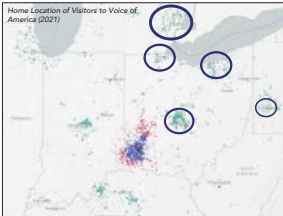
The Athletic Field Complex at Voice of America MetroPark opened in Fall of 2014 and features 22 outdoor natural grass fields and two multi-purpose outdoor lighted turf to accommodate a variety of sports. The Complex has regularly hosted soccer, lacrosse, ultimate frisbee, archery and quidditch. On-site amenities include an indoor field house, concessions and portable restrooms.



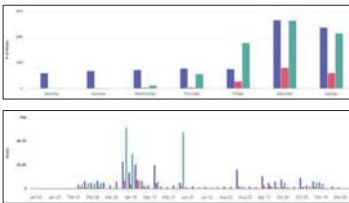
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## The Athletic Field Complex at Voice of America MetroPark Visitation

The Athletic Field Complex saw strong visitation from the local area and long-distance area over 75 miles. Visitors travel from major cities in Ohio, Pittsburgh, Indianapolis, Detroit, and northern Kentucky.



The Athletic Field Complex at Voice of America MetroPark January 2021 - December 2021					
Visitor Origins by Distance from Site	Total Visits		Total Unique Customers		Avg. Visits per Customer
	Est. Number of Visits	Percent of Total Visits	Est. Number of Customers	Percent of Total Customers	
Locals - Within 25 miles	126,302	45%	35,302	24%	3.18
Regional Distance - Between 25 and 75 miles	121,302	45%	27,302	17%	4.43
Long Distance - Over 75 miles	126,396	45%	31,396	24%	3.86
Total Visits	373,999	100%	93,999	100%	3.98



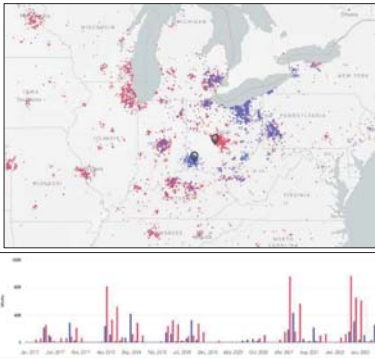
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## Darree Fields & Voice of America Park

Since 2018, Voice of America Park has attracted higher volumes of visitation than Darree Fields year over year.

The map shows visitation to Voice of America (red dots) and Darree Fields (blue dots) beyond 75 miles since 2017. Aside from Pittsburgh and Detroit, Darree Fields visitation primarily comes from within Ohio, while Voice of America Park has pulled visitation from most major midwestern cities.

Kings Hammer Soccer Club operates tournaments at Voice of America Park, driving multiple tournaments per year to the park, including the Turf Classic (450 teams), Elite Spring Thaw (270 teams), Blue Chip Showcase (650 teams) and Crown Challenge (350 teams).



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## Cedar Point Sports Center & Sports Force Park

Location: Sandusky, OH

Opened: 2017

Cost: \$32 million

Owner: Cedar Fair (Private)

Operator: SFM

Sports Features:

- 10 basketball courts
- 18 volleyball courts
- Championship court arena & championship diamond
- 8 multi-purpose outdoor fields

Notes:

Cedar Point Sports Center is a 145,000 square foot multi-sport facility that hosts large scale tournaments, youth sports leagues, team practices corporate events and other private events. The facility was funded by a P3 deal between Cedar Fair Entertainment, Lake Erie Shores and Islands CVB and Firelands Regional Health System.



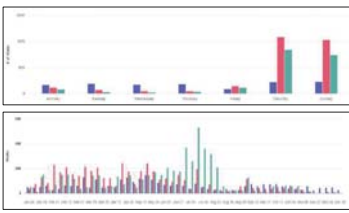
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## Cedar Point Sports Center & Sports Force Park Visitation

Cedar Point Sports Park has built on the success of the Cedar Point Amusement Park in Sandusky, Ohio (4.9 million visitors in 2021). In 2021, beyond local visitation, Cedar Point Sports Center attracted strong visitation from Ohio's major cities, Pennsylvania, Michigan and Indiana.



Cedar Point Sports Center - Sandusky, OH January 2021 - December 2021					
Visitor Origins by Distance from Site	Total Visits		Total Unique Customers		Avg. Visits per Customer
	Est. Number of Visits	Percent of Total Visits	Est. Number of Customers	Percent of Total Customers	
Locals - Within 25 miles	106,302	24%	40,302	45%	2.42
Regional Distance - Between 25 and 75 miles	146,302	33%	40,302	45%	3.63
Long Distance - Over 75 miles	126,396	28%	31,396	35%	4.03
Total Visits	378,999	100%	111,999	100%	3.38



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## Interviewer's Facilities Company

HSP interviewed Sports Facilities Company to understand the dynamic of their facility, the demand for space, and their regional draw for indoor tournaments. This interview indicated the following:

- Cedar Point Sports Center and Sports Force park are separately owned facilities, but Sports Facilities Company helps manage both of them.
- Cedar Point Sports Center's is centrally located from Michigan, Illinois, Indiana, Ohio and Pennsylvania making it a hub for activity in the Midwest.
- Athletes who participate in tournament activity get a pass to Cedar Point that is valid for a year. Teams are typically busy all weekend with tournament play but the tickets bring families back at other times of the year.

## Highlands Sports Complex

Location: Ohio County, WV

Opened: 2020

Owner: Ohio County Development Authority (OCDA)

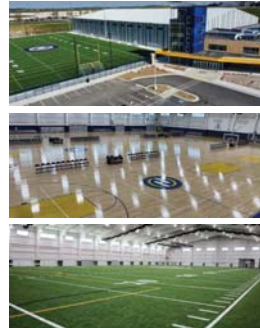
Operator: The Sports Facilities Management (SFM)

Sports Features:

- 6 basketball courts
- 6 volleyball courts
- 1 indoor turf field
- 1 outdoor turf field

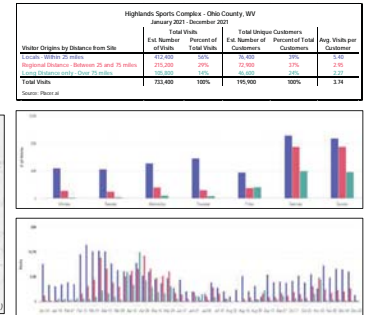
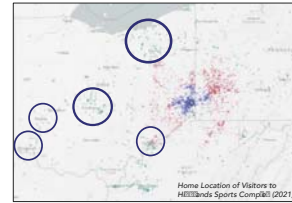
Notes:

The Highlands Sports Complex 200,000 square foot state-of-the-art facility opened in 2020. The facility features six basketball/volleyball courts, an 88,000 square foot vaulted-ceiling indoor turf field, a 90,000 square foot outdoor turf field, a play climb area, and an arcade. Other amenities include batting cages, pickleball courts, a second-floor meal/lounge with views of the courts and turf, team rooms, and an on-site cafe.



## Highlands Sports Complex Visitation

Highlands Sports Complex attracts mainly local and regional visitors with 85 percent of the total visitation traveling from within 75 miles. During the week, the facility sees mainly locals for practice, with the majority of visitation occurring between Friday and Sunday. Weekend visitation displays the impact of tournament activity at Highlands Sports Complex.



## Grand Park Sports Campus

Location: Westfield, Indiana

Opened: 2011

Owner: City of Westfield

Operator: City of Westfield/Various

Sports Features:

- 31 multi-purpose outdoor fields (7 turf)
- 26 diamonds
- 8 basketball courts
- 16 volleyball courts
- 3 indoor multi-purpose turf fields

Notes:

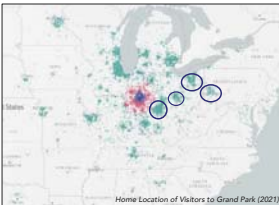
Although much larger scale than our recommendation, this facility puts into perspective the size, features, and mix that draws in a national audience for tournaments and events.

The sports complex is now home to the Indianapolis Colts training camp and the Indiana Pacers Athletic Center.



## Grand Park Sports Campus Visitation

Grand Park attracts visitors from all over the country, but its largest visitation base is the major cities of the Midwest. Over 50 percent of visitation comes from beyond 75 miles, with the majority of visitation between Friday and Sunday. Weekend visitation displays the impact of tournament activity at Grand Park.



## Elizabethtown Sports Park

Location: Elizabethtown, KY

Opened: 2012

Owner: City of Elizabethtown

Operator: The Sports Facilities Management (SFM)

Sports Features:

- 12 turf fields
- 12 turf diamonds
- 2 championship turf fields

Notes:

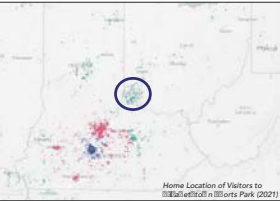
The Elizabethtown Sports Park opened in 2012 and was publicly financed by restaurant sales tax. The facility was built with twelve synthetic turf football diamonds, and twelve natural turf fields used for soccer/lacrosse and field hockey and was publicly financed by a restaurant sales tax enacted in 2007. On-site amenities include three large pavilions for ceremonies, events, and meeting space, stadium lawn seating, The Cecilian Bank Miracle Field, and three miles of multi-modal trail.



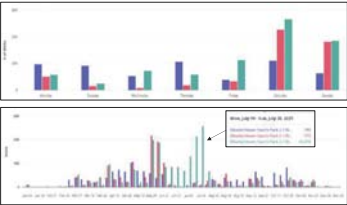


# Elizabethtown Sports Park Visitation

Elizabethtown Sports Park attracts visitors from all over Kentucky, but its largest visitation base is from over 75 miles. Over 10 percent of visitation comes from long distance visitors, with most of those visitors traveling from Cincinnati and Indianapolis.



Elizabethtown Sports Park - Elizabethtown, KY January 2021 - December 2021				
Visitor Origins by Distance from Site	Total Visits Est. Number of Visits	Percent of Total Visits	Total Unique Customers Est. Number of Customers	Percent of Total Customers
Local - Within 25 miles	117,400	28%	16,000	10%
Regional Distance - Between 25 and 75 miles	241,000	62%	34,000	20%
Long Distance - Greater Than 75 miles	58,600	15%	8,000	5%
Total Visits	507,000	100%	58,000	100%



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# Blue Ash Sports Center

Location: Cincinnati, OH

Opened: 1977

Owner/Operator: City of Blue Ash Parks & Recreation

Sports Features:

- 11 baseball diamonds (one turf infield)
- 2 outdoor turf soccer fields

Notes:

The Blue Ash Sports Center is a premier 17-acre facility comprised of 11 baseball diamonds and two soccer fields, nearly half of which are lit for evening and nighttime games. The Sports Center is popular for many of the local high school sports team in addition to a variety of youth sports associations in the area. On-site amenities include ample parking, two restroom facilities and a covered concession area.

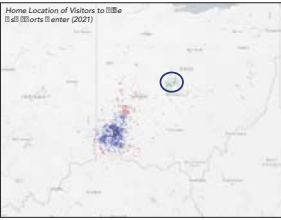
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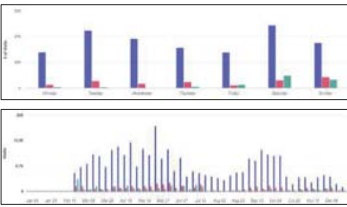
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# Blue Ash Sports Center Visitation

Blue Ash Sports Center predominantly (83 percent) attracts visitors from the local area within 25 miles, which is largely in part to the recreation and adult sports leagues regularly hosted at the facility. The main long-distance market the facility attracts from is the greater Columbus area.



Blue Ash Sports Center January 2021 - December 2021				
Visitor Origins by Distance from Site	Total Visits Est. Number of Visits	Percent of Total Visits	Total Unique Customers Est. Number of Customers	Percent of Total Customers
Local - Within 25 miles	245,000	83%	16,000	10%
Regional Distance - Between 25 and 75 miles	27,000	11%	10,000	20%
Long Distance - Greater Than 75 miles	14,000	6%	8,000	15%
Total Visits	286,000	100%	34,000	100%



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# Donnie Grandison Sports Academy Visitation

Location: Cincinnati, OH

Opened: 2020

Owner/Operator: Donnie Grandison

Sports Features:

- 6 basketball courts
- 8 volleyball courts
- 1 pickleball courts

Notes:

The Donnie Grandison Sports Academy's sport complex is owned and operated by former NBA player Donnie Grandison. The 57,000-sq-ft complex features six basketball courts (two of which are NBA regulation) and eight volleyball courts, with a 1-court pickleball facility. The academy originally opened in 2007 with three basketball courts and six volleyball courts. Ground broke on the new facility in 2017.

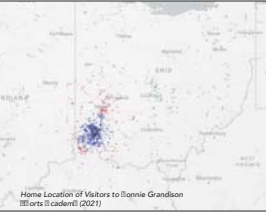


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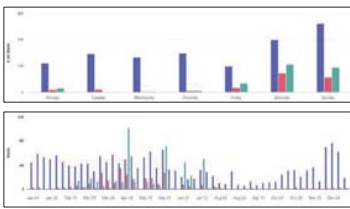
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# Donnie Grandison Sports Academy Visitation

Donnie Grandison Sports Academy predominantly (72 percent) draws visitation from the local area within 25 miles. Long distance markets include major cities within the State of Ohio, with a large pull from the Columbus area.



Donnie Grandison Sports Academy January 2021 - December 2021				
Visitor Origins by Distance from Site	Total Visits Est. Number of Visits	Percent of Total Visits	Total Unique Customers Est. Number of Customers	Percent of Total Customers
Local - Within 25 miles	100,000	72%	10,000	70%
Regional Distance - Between 25 and 75 miles	25,000	17%	11,000	80%
Long Distance - Greater Than 75 miles	23,000	17%	22,000	150%
Total Visits	148,000	100%	43,000	100%



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# SportOne Parkview Fieldhouse

Location: Fort Wayne, IN

Opened: 2017 (expanded in 2017)

Owner: Private

Operator: Private

Sports Features:

- 2 basketball courts
- 2 volleyball courts
- Performance sports area

Notes:

The SportOne Parkview Fieldhouse was opened in 2017 and was originally 57,000 sq. ft. The facility was built with four basketball courts, but in 2017 the facility added an additional 15,000 sq. ft. (two basketball courts) to accommodate the demand in the market. The fieldhouse is located adjacent to the SportOne Parkview Icehouse, a three-sheet ice facility that attracts hockey tournaments in the Midwest.



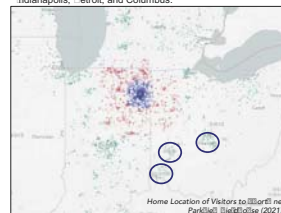
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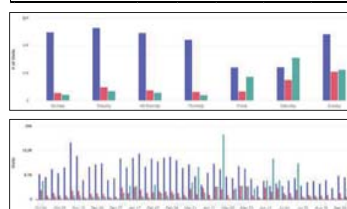
## SportOne Parkview Fieldhouse Visitation

SportOne Parkview Fieldhouse has strong visitation mainly from the Midwest given its central location. The facility has year-round visitation consistently through the week. Long-distance markets include major cities such as Chicago, Indianapolis, Detroit, and Columbus.



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Visitor Origins by Distance from Site	Total Visits Est. Number of Visits	Percent of Total Visits	Total Unique Customers Est. Number of Customers	Percent of Total Customers	Avg. Visits per Customer
Within 25 miles	100,000	100%	20,000	100%	5.00
Between 25 and 50 miles	10,000	10%	2,000	10%	5.00
Greater than 50 miles	10,000	10%	2,000	10%	5.00
<b>Total Visits</b>	<b>120,000</b>	<b>100%</b>	<b>24,000</b>	<b>100%</b>	<b>5.00</b>



## Under Construction/Planned

## Spooky Nook Sports Champion Mill Under Construction

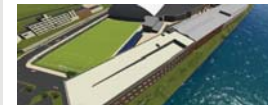
Spooky Nook is currently under construction in Hamilton, Ohio and is expected to be open in the later months of 2022.

Along with the youth sports facility, there will also be roughly 390,000 square feet of convention and hotel space as well as 54,000 square feet of retail, restaurant and office space. The attached 333-room hotel is expected to open in the next three months in preparation for the new facility's opening.

Upon completion, the Champion Mill location will be one of the largest youth sports facilities in the country. The complex will be roughly 691,000 square feet and include 14 hardwood courts, 9 batting cages, 100,000 square feet of sport courts, 80,000 square feet of fitness equipment, a turf soccer field, a baseball infield, an arcade, ropes courses, summer camps, a brewery, an orthopedic center and local retailers.

The Hamilton Visitors Bureau revealed that the complex's hotel and convention space has recently opened, but the sports complex is still under construction.

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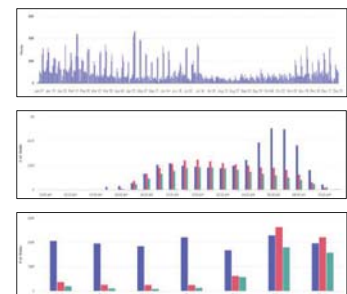
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## Spooky Nook Sports Lancaster Visitation



Visitor Origins by Distance from Site	Total Visits Est. Number of Visits	Percent of Total Visits	Total Unique Customers Est. Number of Customers	Percent of Total Customers	Avg. Visits per Customer
Within 25 miles	100,000	100%	20,000	100%	5.00
Between 25 and 50 miles	10,000	10%	2,000	10%	5.00
Greater than 50 miles	10,000	10%	2,000	10%	5.00
<b>Total Visits</b>	<b>120,000</b>	<b>100%</b>	<b>24,000</b>	<b>100%</b>	<b>5.00</b>

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## Motown Sports (Planned)

Motown Sports Group Holdings has partnered with Sports Facilities Companies, JLL and ASM Global on a new planned facility in Romulus, Michigan that is anticipated to come online in 2025.

As currently planned, at full buildout the facility will include:

- Indoor turf fields for football and soccer
- 12 basketball courts
- 4 hockey rinks
- 10,000-seat arena with 28 suites
- 2 IMAX theatres, Topgolf & indoor water park
- Surf park & fitness center
- 3 full-service hotels and retail shops

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## Tournament Opportunities & Interview Data



Report on Tournament Site and

Factors Driving Tournament Demand & Activity:

There are several factors that impact a city's ability to capture large tournaments. These factors include the following:

- Number and quality of fields and playing surfaces
- Strong on/off-site amenities and attractions
- Accessibility, by Air and by Car

Cities with stronger packages of the above listed items will be more successful in attracting major tournament groups. These major tournament groups garner a nationwide pull for tournaments which bring in teams from surrounding states and across the country.

Opportunities in Dublin:

- Artificial, lighted outdoor turf fields give Dublin the offerings needed to attract and retain local, regional and national tournaments due to upgraded quality that tournament operators have been seeking in the Columbus area
- 9 basketball and 12 volleyball courts would be the largest facility in the Columbus market, giving Dublin the opportunity to host regional/national indoor tournaments

Tournament Operators

ISS spoke with several tournament organizations that operate in the area across several indoor and outdoor sports:

Basketball and volleyball tournaments are typically run by local clubs or facility owners, however, there are a few large governing bodies that run tournaments as well. One of these organizations includes the Amateur Athletic Union (AAU), which has several chapters within Dublin basketball and volleyball.

Within the outdoor landscape, ISS spoke with US Youth Soccer, The Irish Academy, USSSA, AISI, and Dublin Youth Athletics (DYA).

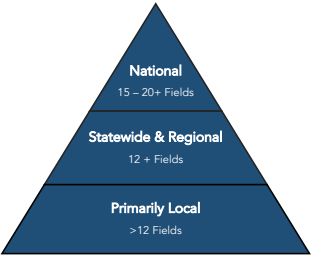
The following section provides summaries of interviews with these organizations and various local organizations within Dublin.



Indoor Soccer Tournament Opportunities

For the sport of soccer, the following breakdown of field counts provide a basis of understanding for the types of tournaments they are able to attract:

Local tournaments that drawn in people from far away and drive overnight in the local hotels typically seek facilities with a minimum of 12 fields.



Alternative Sport Opportunities

HSP has identified other sports that are growing significantly that can utilize indoor space to fill times and keep the facility efficient.



Pickleball

- Pickleball is a fast-growing sport that has gained significant popularity recently. The sport can be played on hard courts, surfaces or tennis courts. The indoor courts can be utilized for pickleball during the morning and afternoon hours when youth programs are slow. This optimizes facility usage and mitigates down time.

Futsal

- Futsal is a very popular sport that is typically played on hard court space and fits within a basketball court. Futsal tournaments at the facility can fill in slow seasons where basketball and volleyball slow up.

Lacrosse

- Lacrosse is a major sport that operates in the Spring and Summer months that is growing across the country. The tournaments and leagues can be targeted and drawn to the area. Lacrosse is played on soccer or football fields typically. Major tournament operators include Adrenaline Lacrosse, Major Force Lacrosse, and US Club Lacrosse.

Interview with Soccer College Ball and Professional

ISS interviewed a director of USA Volleyball in the Ohio Valley region to understand the competitive volleyball landscape in the region and the potential demand for a large tournament caliber facility. The interview indicated the following:

- In 2022, the Ohio Valley Region (Ohio, Pennsylvania and West Virginia) there over 900 tournaments scheduled to be played. Within 60 miles of Dublin, there are roughly 40 clubs.
- The OVR wants to move tournaments out for the convention center because of the high fees associated with running tournaments at the facility. They are very interested in partnering with the Project to host tournaments in the Columbus area instead of the convention center. The Project's size and location is the driving factor for why the facility would be successful and attractive to them.
- Teams from all over the Midwest, New York and Canada are attending USAV events in the OVR.
- Beach volleyball could be an attractive option that could set the facility apart and make it a destination in the Midwest.

Interview with Mid Ohio Pumas as a Professional

ISS interviewed the founder of the Mid Ohio Pumas AAU basketball organization and the owner of the Westwood Fieldhouse to understand the basketball tournament landscape in the region and the potential demand for a large tournament caliber facility. The interview indicated the following:

- The Mid Ohio Pumas are one of the largest basketball and volleyball organizations in the Midwest with roughly 120 total teams.
- There is a shortage of court space in the Columbus market and there are currently no facilities that allow for basketball tournament play. He built the Westwood Fieldhouse because the lack of court space and scheduling frustrations. If tournaments occur in Columbus, they take place at FieldhouseUSA, but they messed up buy underbuilding the facility. Tournaments at FieldhouseUSA attract around 65 teams but regional tournaments they attend are attracting over 200 teams.
- A majority of their teams are currently going to Indianapolis for tournaments, but there is significant potential in the Columbus area for an eight-court facility. There is plenty of demand in the local and regional market to support eight courts.
- The founder of the program helps run Bleacher Republic tournaments, a local tournament operator. They currently use FieldhouseUSA, Westwood Fieldhouse, Otterbein University and local high schools for court space. The tournament operating company would be interested in having a facility with a minimum of eight courts for tournaments in the area. The ability to host tournaments in a facility this size would improve the quality of their tournaments by reducing the travel to other cities and give them capacity to host larger, more competitive tournaments.



## Interview of Ohio Soccer Association Great Lakes Alliance and South Soccer

OS interviewed a director of the Ohio Soccer Association and the South Soccer program to understand the competitive soccer landscape in the region and the potential demand for a large tournament caliber facility. The interview indicated the following:

- **The Ohio State Cup has been held at Darree Fields, but over the past three years, the quality of fields has drastically decreased.** The prime fields that were used for tournament games were unplayable by the end of the tournament. A major reason for this is the time of the year. **During March, April and May tournaments need to be held on turf in order to produce the best tournament possible.**
- **A facility in Dublin would ideally have between six and eight turf fields available for tournament use.** The State Cup tournament needs roughly 20 fields in total but a mix between grass and turf is adequate. The turf fields would be necessary to protect against weather issues and to preserve grass fields from overuse throughout the tournament.
- Six to eight turf fields introduces the opportunity for Dublin to hold events beyond youth sports tournaments, including college showcase events that attract large crowds for spectating and professional scouting purposes.
- Additional parking at Darree Fields is also necessary to improve the efficiency of the tournament and prevent the logistical problems visitors have had in the past.

## Interview of Club Ohio

OS interviewed a director of Club Ohio to understand the competitive soccer landscape in the region and the potential demand for a large tournament caliber facility. The interview indicated the following:

- Club Ohio is one of the largest club teams in the state with 115 teams and nearly 1,600 participants. The club practices and plays games at Darree Fields and hosts the Nike Cup, the largest soccer tournament in Ohio. In the winter months, the club works with five high schools to rent turf fields and pays between \$100 and \$250 an hour.
- Teams older than the U11 age group travel all over the state, Indiana, Michigan, Kentucky and Pennsylvania. The club hosts teams in Dublin even when they are not playing because of Columbus' central location within the league.
- **Club Ohio hosts three tournaments each year and they are looking to expand, but they are restricted with field availability.** The tournament hosted over labor day attracts 100-140 teams that are mostly local. The tournament over the first weekend in November attracts 300-400 teams around the state. The Nike Cup is held over two weekend in April, one weekend for girls and one weekend for boys, attracting 700-800 teams per year in total.
- **The Nike Cup has stated to decline in participation from out-of-state facilities, such as Grand Park, because elite programs would rather go to facilities in the region with turf, lighted fields.** The club frequently travels to Grand Park in Westfield and Voice of America in Cincinnati.

## Interview of Ohio Premier

OS interviewed the executive director of Ohio Premier to understand the competitive soccer landscape in the region and the potential demand for a large tournament caliber facility. The interview indicated the following:

- Ohio Premier is a local club team in the market that pulls participation from Dublin residents. The team has roughly 1,300 participants between boys and girls.
- The club's leadership has always thought that the local market has lacked ample, high-quality field space. **In order to keep players within the club, they purchased 42 acres in Plain City and built two lighted-turf fields and three grass fields. Roughly one third of the club trains in their private complex and they have plans to expand with more turf and a potential indoor building.**
- The club travels to Grand Park and Voice of America for regional tournaments. The club also travels nationally to participate in competitive tournaments.
- **With the level of local participation, clubs could use an additional 6-8 turf fields to use throughout the week for practice.** On the weekends, turf would help attract visitation from the region because Columbus is geographically located in the center of the league.

## Interview of Dublin Official and South School

OS interviewed the athletic director of Dublin Official and South School to understand the landscape of competitive high school sports in the region and the potential demand for a large tournament caliber facility. The interview indicated the following:

- **Columbus is a growing city and has the best location within the state, but it does not have a relevant, adequately-sized, multi-court facility.** Dublin has the opportunity to be a first mover on a multi-court Project to attract regional tournament activity. Other cities in the region have a central facility to host tournaments and Columbus would be a prime location in Ohio because it is the midpoint for major cities within Ohio and centrally located between Indiana, Michigan, Pennsylvania and Kentucky.
- **FieldhouseUSA has the ability to host basketball and volleyball, but it is underbuilt for basketball and volleyball tournaments.** During the season for basketball and volleyball, the facility is full for tournaments every weekend.
- The local demand for court time is extremely high. Travel and club teams in the area are forced to use elementary, middle and high school for practice, but they do not have priority in any of these facilities, leading to inconvenient schedules. **Between DYA and club basketball and volleyball teams, local demand would fill court time at a new facility during the week.**
- The Columbus market is also lacking a small arena for capacities of 3,000-5,000 that would help them attract a wide variety of high-level competitions and shows.

## Interview of Vanguard College

OS interviewed a director of Vanguard College to understand the volleyball tournament landscape in the region and the potential demand for a large tournament caliber facility. The interview indicated the following:

- Vanguard Volleyball is a boys volleyball club with roughly 120 participants, mainly from the Dublin and Hilliard area.
- The team uses multiple facilities in the market but has been primarily using Fieldhouse USA. The team draws members from Columbus, Dayton, Cincinnati, Indianapolis, Pittsburgh and other midwestern cities. **As a result, the team practices on Friday nights and Saturday mornings, and it can be very difficult to get court times that the club requires. Fieldhouse USA is the best option for them because they use all eight courts that the facility has to offer. With a larger facility, the club has the potential to grow, especially because boys volleyball is rapidly growing as a result of being sanctioned by OHSAA.**
- **In 2017, when the Boys' Junior National Championships was held in Columbus, the tournament attracted record participation numbers and a large part of the success was due to Columbus' accessibility nationwide.**
- Columbus is in desperate need of a mid-sized facility (16 courts) because it has the convention center for national tournaments and then smaller, spread-out locations. **There is currently no medium-size venue in the market.**

## Interview of Greater Columbus Volleyball Club (GCVC)

OS interviewed the owner of Greater Columbus Volleyball Club to understand local demand and baseball and softball facilities in Dublin. The interview indicated the following:

- GCVC runs between 20 and 24 teams per year across various age groups. The club built their own, four-court facility (25,000 square feet) in a warehouse to allow them to control court time. **Various clubs have built their own facilities, but the market needs a facility with 16-20 courts that can host larger tournaments than the ones currently being played at FieldhouseUSA.**
- Local clubs have expressed frustrations with consistently leaving Columbus for tournaments because they do not have a facility to host tournaments. The number of girls' volleyball teams in the Columbus area provides a core group of teams to participate in tournaments that would be held in Dublin. **With 16 courts, anywhere between four and twelve clubs could be invited to play in a tournament without having to use an additional, support facility.**
- Dublin would be a great location for a facility because it is easier to access than a facility downtown. Hotel supply in the local area is currently adequate, but the increased number of courts would allow for larger tournaments and would require additional keys in the market.



Interview with Athletic Directors (ADA)

Interviewed the athletic directors of the ADA to understand local demand for a new youth sports facility in Dublin. The interview indicated the following:

- Basketball is DYA's largest program with roughly 2,000 participants. The program's size is not supported by the number of courts in the market. DYA uses local elementary, middle and high school gyms for practices, but they do not have priority in these spaces.
- The lack of courts only allows the younger age groups to practice, and high school level age groups do not get to practice throughout their seasons. Teams that do get to practice often have to share courts with other teams within DYA. Since DYA uses school gyms, the gyms are typically not open in the summer. As a result, they do not host summer programs, which they believe would be very popular.
- Volleyball is roughly ten percent of the size of the basketball program but has grown in popularity over the past few years. DYA has acted as a strong feeder program to the club volleyball teams around the Dublin area and has the potential to increase participation at the club level.
- There is strong potential for multi-purpose, outdoor turf to support lacrosse, softball and baseball within DYA. Baseball and softball on grass fields has led to many difficulties including cancellations and destruction of fields in the past. Currently, lacrosse does not have a dedicated space. Lacrosse shares grass with cricket at Darree Fields and uses grass space that the city mowed and set up for them.

Interview with Softball

Interviewed the directors of the ADA softball to understand local demand and baseball and softball facilities in Dublin. The interview indicated the following:

- Currently, DYA softball has seven teams with roughly 80-90 total participants, and they are trying to add an eighth. Softball uses two fields at Darree, but the program is quickly outgrowing the space. Softball books the two fields at Darree every night during the season and runs doubleheaders to fit all the teams in before it is too dark out to play.
- Tournaments at Darree are hard to run because there are not enough fields. Softball alone could use four fields and could fill 80 percent of the available time during the week, since more fields would allow the program to grow. Four fields would allow each age group to have a field.
- DYA has lost participants to other cities because of turf facilities in Marysville and Columbus. Older teams and clubs go to Lou Berliner in Columbus, Action Sports in Dayton and Grand Park to play on turf surfaces. These facilities are successful for tournaments because they protect against weather cancellations.
- DYA teams are paying \$650-\$800 to play in tournaments, but they could save lots of money with the ability to host their own in Dublin.



Interview with Aquatics Market Supply

Dublin currently has two outdoor pools and one indoor pool at the Dublin Community Recreation Center. The pools measurements include:

- Dublin Community Recreation Center – 8 lanes, 25 yards
- Dublin Community Pool North – 8 lanes, 25 meters
- Dublin Community Pool South – 8 lanes, 25 meters

Interview feedback with local organizations communicated that the high school swim programs and the Dublin Sea Dragons, the local competitive and recreational swim club, are restricted on space for practices and meets. Local teams often drive between 20 and 30 minutes to facilities in other cities to rent lane time for practices and meets and since they are not within the other city's organizations, they do not get priority on scheduling times. Teams typically utilize lane time early in the mornings or later in the evenings.

USA Swimming's National Club Development Committee uses a tiered system (1-4) to rank club's long-term success based on business and organization success, parent and volunteer development, coach development and education and athlete development and performance. The Dublin Sea Dragons are recognized as a level two club by USA Swimming.

Teams in Dublin travel throughout Ohio and the Midwest for meets. The following slide shows the supply of facilities that host meets in the Columbus market.

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colours of the petting zoo animals

HSP analyzed USA Swimming meets throughout Ohio and the Midwest and included facilities that have previously held competitive events. The competitive supply within Columbus includes high school natatoriums, the Bill and Mae McCorkle Aquatic Pavilion at Ohio State, and publicly operated facilities. Placeholder data does not allow for geocoding data on high school facilities, restricting the ability to analyze select facilities within the competitive set.

Since the COVID-19 pandemic, the Bill and Mae McCorkle Aquatic Pavilion has restricted access for local clubs to utilize and has not held many meets beyond National Collegiate Athletic Association (NCAA) events. In 2022, the facility held one high school event, showing signs that it has started to open back up to external activity. State championships used to be held at Ohio State, but have since moved to Mason, Ohio and Miami University.

Legend

Water Facility

Outdoor Facility/Pool

Water Facility

### Columbus Competitive Aquatics Facility Supply

Facility Name	Location	Distance from Site (Miles)	Public Access	Bodies of Water	Competition Pool	Diving Well	Leisure Pool
Worthington Swim Club	Worthington	12.9	✓	4	Various	1	2
Upper Arlington High School Natatorium*	Upper Arlington	12.6	✗	1	9 lanes, 25 meters	1	0
Bill and Mae McCorkle Aquatic Pavilion - OSU	Columbus	17.9	✗	3	Various	1	1
Columbus Aquatics Center	Columbus	19.2	✓	2	4 lanes, 25 yards	1	1
Columbus Academy Pool*	Columbus	20.1	✗	1	4 lanes, 25 yards	0	0
Columbus St. Charles*	Columbus	21.5	✗	1	4 lanes, 25 yards	0	0
New Albany High School*	New Albany	22.6	✗	1	4 lanes, 25 yards	1	0
Columbus School for Girls*	Columbus	23.1	✗	1	8 lanes, 25 meters	0	0
Columbus Swimming Pool	Columbus	23.3	✓	2	9 lanes, 25 yards	1	1
Total/Range		15.4		22		7	8

\*High seasonality  
Source: Various Sources

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### Upper Arlington High School Natatorium

**Location:** Upper Arlington, OH  
**Opened:** 2021  
**Capacity:** 1,500  
**Features:**

- 11 lanes, 25 yards / 9 lanes 25 meters
- Water polo competition capabilities
- 2 diving boards (1 meter)

**Notes:**

The Upper Arlington Natatorium was designed by Moody Nolan and Perkins and Will. The natatorium was part of the \$230 million bond-levy for the historic Upper Arlington Legacy project intended to enhance the Upper Arlington Schools athletic and academic facilities.

In 2022, the facility hosted USA Swimming meets in January and February.



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### Columbus Academy

**Location:** Gahanna, OH  
**Opened:** 2021  
**Capacity:** 1,500  
**Features:**

- 6 lanes, 25 yards

**Notes:**

In addition to the Columbus Academy swim teams, the Greater Columbus Swim Team of Ohio (GCSTO) uses the facility from practices and swim meets. GCSTO is recognized as a level four club by USA Swimming.

An anchor tenant within aquatics facilities helps consistently fill lane time, ensuring revenue generation throughout the season.

GCSTO uses Columbus Academy to host indoor meets in the spring, fall and winter and uses the Gahanna Swimming Pool for summer outdoor meets.



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### Worthington Swim Club

**Location:** Worthington, OH  
**Operator:** Swiminc Inc. 501(c)(3)  
**Features:**

- Indoor Pool: 6 lanes, 25 yards
- Outdoor Pool: 6 lanes, 25 yards
- Warmup / leisure lap pool
- Leisure Pool

**Notes:**

In March of 2022, the Worthington Swim Club held an indoor USA Swimming meet. The facility is managed by Swiminc, a community based, private nonprofit organization that works with the Worthington School District. The Worthington Swim Club is recognized as a level two club by USA Swimming.

The facility uses a membership model, charging \$235 for single resident membership up to \$454 for resident families of 4.



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### Worthington Swim Club Visitation

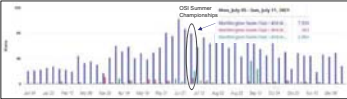
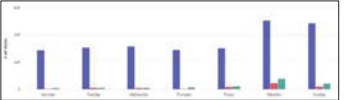
The Worthington Swim Club attracts a high percentage of local visitation as a community pool. During the the Summer Championships swim meet in July 2021, the swim club attracted roughly 2,000 visitors from beyond 75 miles, but nearly all visitors came from within Ohio.



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Worthington Swim Club - Worthington, OH					
Visitor Origins by Distance from Site	Total Visits		Total Unique Customers		Avg. Visits per Customer
	Est. Number of Visits	Percent of Total Visits	Est. Number of Customers	Percent of Total Customers	
Locality: Within 25 miles	298,482	94%	19,388	95%	1.54
Regional Visitors: Between 25 and 75 miles	19,288	6%	7,388	35%	2.62
Long-Distance Visitors: Over 75 miles	12,000	4%	5,000	25%	2.40
Total Visits	329,770	100%	21,776	100%	4.56

Source: Floor at



### James A. Steen Aquatic Center at Kenyon College

**Location:** Gambier, OH  
**Opened:** 2006  
**Cost:** \$70 million  
**Capacity:** 370  
**Features:**

- Olympic-sized pool: 50 meters by 25 yards accommodates 9 lanes, 50 meters or 19 lanes, 25 yards
- Deck-accessible locker rooms
- 151-square-foot whirlpool spa
- 1-meter and 3-meter springboards

**Notes:**

The James A. Steen Aquatic Center was designed by Gund Partnership and Counsilman-Hunsaker. The 263,000-square-foot athletic center features Colorado Time Systems timing equipment, which includes a full-color video scoreboard and a moveable bulkhead to accommodate aquatics lessons, fitness programming and other activities. The facility regularly hosts competitive regional meets in addition to college events.



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## Regional Aquatics Market

### Regional Competitive Aquatics Facility Analysis

HSP analyzed USA Swimming meets throughout Ohio and the Midwest and included facilities that have previously held competitive events. The competitive supply within the regional area includes high school natatoriums, college aquatic facilities and natatoriums, and one community recreation center. Placer's data does not allow for geocoding data on high school facilities, restricting the ability to analyze select facilities within the competitive set.

Many of the facilities in the regional competitive supply are open to the public for set times throughout the week and allow entry with a day-pass or membership program for leisure swimming and aquatic programs. However, public access is limited especially with competitive meets going on. The following slides will profile the most relevant facilities.

Facility Name	Location	Distance from Site (Miles)	Public Access	Bodies of Water	Competition Pool	Visiting Capacity	Diving	Leisure Pool
Central Aquatics Center at Kenyon University**	Gambier, OH	36.2	✓	2	1	1	0	0
James A. Steen Aquatic Center at Kenyon College**	Gambier, OH	36.2	✓	1	1	1	0	0
Boeing Green State University**	Boeing Green, OH	101	✓	2	22 lanes, 25 yards	-	1	1
Mason Municipal Aquatic Center	Mason, OH	101	✓	3	10 lanes, 50 meters	1,000	0	1
Central State Aquatic Center**	Delaware, OH	114	✓	2	8 lanes, 50 meters	1,000	1	1
Knox Natatorium	Cincinnati, OH	114	✓	1	8 lanes, 50 meters	400	0	0
Indiana University Natatorium**	Indianapolis, IN	113	✓	2	8 lanes, 50 meters	4,300	1	0
OHIO Aquatics Center	Cincinnati, OH	98	✓	2	10 lanes, 50 meters	2,300	1	1
<b>Totals/Range</b>		<b>100.7</b>	<b>0</b>			<b>1,500</b>	<b>4</b>	<b>4</b>

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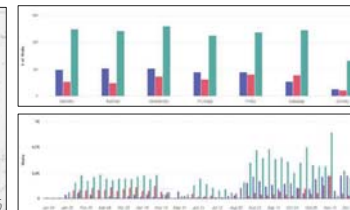


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### James A. Steen Aquatic Center Visitation

The majority of visitation to the James A. Aquatic Center at Kenyon College comes from long distance travelers across the country, which is due to the level of national meets held at this facility. In 2021, most visitation occurred in the late summer to fall months consistently throughout the week.

Visitor Origin by Distance from Site	Total Visits	Total Unique Customers	Avg. Visits per Customer
Local: Within 25 miles	12,800	2,800	12.71
Regional: Between 25 and 100 miles	28,700	4,700	6.11
Long Distance: Over 100 miles	15,500	3,100	5.00
<b>Total Visits</b>	<b>57,000</b>	<b>10,600</b>	<b>5.40</b>



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### Mason Municipal Aquatic Center

Location: Mason, OH

Opened: April 2022

Cost: \$20 million

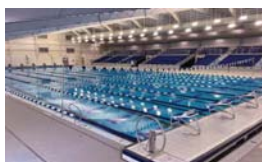
Capacity: 1,000

Features:

- Indoor 50-meter competition pool: 10 lanes, 50 meters or 20 lanes, 25 yards
- Heated leisure pool and splash pool also at the recreation center

Notes:

The Mason, Ohio's Park and Recreation Program officially opened the Mason Municipal Aquatic Center (MMAC) that is home to the Mason Mantas, a USA Swimming Gold Medal Club. The flexibility of the pool allows opportunities for Master swimming, water polo, and triathlon training. The new venue features an Omega timing system, a full video scoreboard and spectator seating for up to 1,000.



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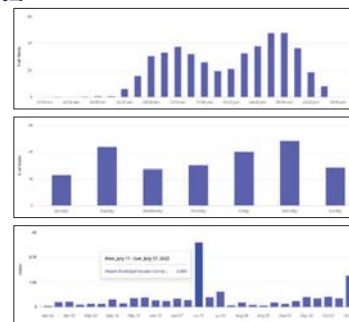
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### Mason Municipal Aquatic Center Visitation

Total visitation data for the Municipal Aquatic Center is limited since it recently opened in April 2022. However, the facility has seen strong visitation in recent months mainly pulling from areas within Ohio.



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### Indiana University Natatorium

Location: Indianapolis, IN

Opened: 1982

Cost: \$21 million (1982) \$20 million renovation (2016)

Capacity: 4,700

Features:

- Main competition pool: 8 racing lanes, 50 meters
- Additional 50-meter pool
- Diving well depth of over 17 feet
- 1-meter and 3-meter boards and five diving platforms of 1, 3, 5, 7.5, and 10 meters in height

Notes:

The IU Natatorium is the largest indoor aquatic facility in the United States with a seating capacity of 4,700 and has hosted events ranging from high school meets to national level meets such as the Olympic Trials. The two moveable bulkheads allow for long or short course events as well as hosting water polo and synchronized swimming. There are also six underwater windows for television and coaching analysis.

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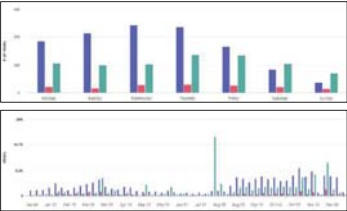
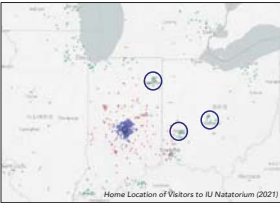
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Indiana University Natatorium Visitation

The Indiana University Natatorium hosts consistent events throughout the year. In 2021, there were over 311,000 visits to the facility with visitors from ma or cities throughout the Midwest such as Milwaukee, Chicago, Fort Wayne, Detroit, Dayton, Columbus and Cleveland.

Visitor Origins by Distance from Site	Indiana University Natatorium January 2021 - December 2021				Avg. Visits per Customer
	Total Visits	Est. Number of Visits	Percent of Total Visits	Est. Number of Customers	Percent of Total Customers
Locals - Within 25 Miles	11,482	11,482	3%	11,482	3%
Regional Markets - Within 25 and 75 Miles	11,482	11,482	3%	11,482	3%
Out of State - Within 75 and 100 Miles	11,482	11,482	3%	11,482	3%
Total Visits	311,000	311,000	100%	39,600	100%



Aquatics Market Implications

- Natatoriums are costly investments that are often found within high schools and universities.
- Columbus is home to multiple USA Swimming-affiliated clubs and is growing sport within the greater Columbus area. Columbus is home to multiple natatoriums and outdoor pools capable of hosting regional swim meets, but most facilities are associated with local high schools and Ohio State University. Since the pandemic, Columbus Academy and Upper Arlington have emerged as the busiest natatoriums in the area.
- The regional market includes university natatoriums and a new facility in Mason, OH that consistently host statewide and regional swim meets.



Aquatics Interviews

Interview: Dublin Sea Dragons

HS interviewed a director of the Dublin Sea Dragons to understand the local aquatics market. The interview indicated the following:

- The Dublin Sea Dragons are a year-round program that use all three pools within the city. In the summer, the team practices Monday through Friday at the outdoor pools. During the high school season, the team uses the whole indoor pool at the recreation center.
- During the high school season, space limitations lead to the club renting time in Northland and Marysville for 6 AM practices, which is roughly a 20-minute drive for most Dublin residents.
- The program's growth has been restricted by limited lane space. The program has hit a capacity of 300 swimmers and had to cut 50 participants because of the lack of available space.
- The most common places the club travels to are Mason and Cincinnati. The club also goes to Kenyon College, Dennison, Bowling Green and the Indiana University Natatorium.

08

Support Amenities:  
Hotel & Restaurant  
Analysis



Support Amenities



## Hotel Market Analysis

### Local Lodging Summary

STI, using data from Smith Travel Research, identified the closest hotels within a 10-mile radius of the project site at Darree Fields.

The local lodging supply mainly consists of Upper Midscale and Upscale properties at 33 and 26 percent, respectively.

This supply includes 50 hotel properties that total more than 5,300 rooms. The average age of the hotel supply is 18 years with recent developments continuing to focus on Upper Midscale and Upscale properties.

Lodging Summary - Dublin (within a 10-mile radius)						
Chain/Scale	Rooms	% of Total Rooms	Hotels	Rooms per Hotel	Avg Year Open / Renovated	Avg Age (Years)
Upper Upscale	594	11%	2	297	2014	8
Upscale	1,396	26%	11	127	2012	9
Upper Midscale	1,755	33%	18	98	2008	13
Midscale	382	7%	6	64	2000	21
Economy	1,072	20%	11	97	1994	27
Independent	114	2%	2	57	1991	30
<b>Total/Average</b>	<b>5,313</b>	<b>100%</b>	<b>50</b>	<b>123</b>	<b>2003</b>	<b>18</b>

Source: Smith Travel Research, CoStar, HotelierBooks, Hudson Strategic Partners

### Local Hotel Supply Analysis

STI identified the hotel competitive set in Dublin by conducting market research and interviewing local hoteliers. STI believes that the competitive set in the table above best reflects the sports lodging market in the area and its performance. There are 10 hotels in the competitive set that range from Upper Midscale to Upscale and from 100 rooms to 310 rooms. All of the hotels in the competitive set are within four miles from the project site at Darree Fields.

Dublin, OH Competitive Hotel Supply					
Property Name	City	Miles from Site	Rooms	Year Built / Renovated	Hotel Class
Holiday Inn Express Columbus Dublin	Dublin, OH	3	117	2019	Upper Midscale
Staybridge Suites Columbus - Dublin	Dublin, OH	3.1	111	2017	Upscale
Courtyard Columbus Dublin	Dublin, OH	3.3	147	2014	Upscale
Hilton Garden Inn Columbus Dublin	Dublin, OH	3.3	100	2014	Upscale
Hyatt Place Columbus Dublin	Dublin, OH	3.4	123	2007	Upscale
Marriott Columbus Northwest	Dublin, OH	3.4	310	2016	Upper Upscale
TownPlace Suites Columbus Dublin	Dublin, OH	3.4	105	2021	Upper Midscale
Drury Inn & Suites Columbus Northwest	Dublin, OH	3.4	146	2012	Upper Midscale
Embassy Suites by Hilton Columbus Dublin	Dublin, OH	3.5	284	2011	Upper Upscale
Hornet Suites by Hilton Columbus Dublin	Dublin, OH	3.6	129	2017	Upper Midscale
<b>Total / Average</b>		<b>10 hotels</b>	<b>1,784</b>	<b>2015</b>	

Source: CoStar, Smith Travel Research

### Local Hotel Supply Map

The adjacent map details the local hotel supply within less than four miles from the project.

In order to accomplish tournament functionality, it is important for major youth sports developments, such as the project, to have an adequate supply of nearby hotel rooms. Adequate hotel clusters help facilitate the site selection process.

The largest clusters of relevant hotel properties are located off of Forest Road, which is right by I-270 and U.S. Route 33, as well as the Tuttle area right off of I-270.

The following section details the hotel performance within the Dublin area.



### Competitive Set Performance

STI pulled data from Smith Travel Research (STI) to understand the performance of the competitive set from January 2014 through August 2022. The local competitive set generally has been performing well over the eight-year period. From 2014 to 2019, ADP had been steady with additional supply delivered into the market and occupancy levels slightly decreasing but overall stable. The market began to recover in 2021 and 2022, but the performance has yet to fully recover to pre-pandemic levels.

Historical Supply, Demand, Occupancy, ADR, and RevPar for Competitive Hotels (Dublin, Ohio)												
Year	Annual Avg Available Rooms	Available Room Nights	% Change	Room Nights Sold	% Change	% Occupancy	% Change	ADR	% Change	RevPar	% Change	
2014	1,546	564,290	-	384,397	-	68.1	-	\$115.51	-	\$78.68	-	
2015	1,546	564,290	0.0%	400,983	4.2%	71.0	4.2%	\$117.66	1.9%	\$83.52	6.2%	
2016	1,546	564,290	0.0%	406,090	1.4%	72.0	1.4%	\$116.60	-0.9%	\$83.91	0.5%	
2017	1,592	581,792	3.0%	416,951	2.7%	71.7	-0.3%	\$114.88	-1.5%	\$82.42	-1.8%	
2018	1,679	612,835	5.4%	422,401	1.3%	68.9	-3.9%	\$113.07	-1.6%	\$77.93	-5.4%	
2019	1,661	606,170	-1.1%	427,296	1.2%	70.5	2.3%	\$115.24	1.9%	\$81.23	4.2%	
2020	1,379	502,250	-17.0%	169,575	-60.3%	21.7	-52.2%	\$98.91	-14.2%	\$33.33	-60.0%	
2021	1,534	560,085	11.3%	242,328	42.9%	43.3	26.4%	\$109.31	10.5%	\$47.29	41.9%	
<b>2022 YTD (August)</b>	<b>1,589</b>	<b>581,267</b>	<b>3.4%</b>	<b>198,050</b>	<b>26.4%</b>	<b>51.9</b>	<b>24.2%</b>	<b>\$121.48</b>	<b>15.3%</b>	<b>\$73.46</b>	<b>41.2%</b>	

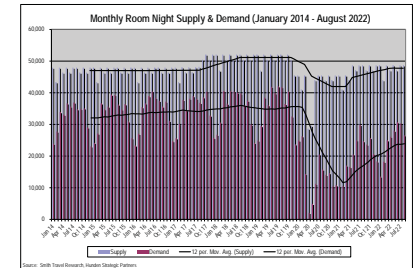
Source: Smith Travel Research, Hudson Strategic Partners

### Supply & Demand

The supply of room nights in the local competitive set has steadily increased leading up to the COVID-19 pandemic due to the delivery of new product. However, once the pandemic occurred in March 2020, hotels began to shut down.

Hotel room demand shows consistent seasonal trends with summer months experiencing significantly higher demand than winter months.

Demand followed a pattern until 2020 and has generally increased with supply increases, which suggests a healthy and balanced market. Demand has begun to recover but has not quite reached pre-pandemic levels.



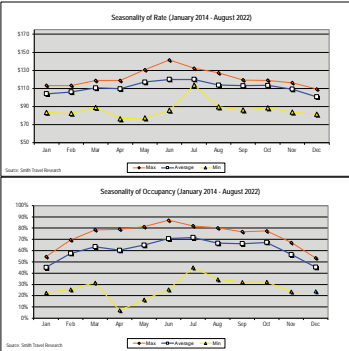
Source: Smith Travel Research, Hudson Strategic Partners



Seasonality
ADR & Occupancy

The adjacent tables detail the seasonal performance of the local competitive set since 2014. As shown, the competitive set experiences its highest rates during the summer months. The winter months are more affordable, demanding the lowest average historical rates, which is common in an area that experiences extreme seasonality.

Occupancy trends follow a similar pattern as rates, with with June, July and August being the highest demand periods.

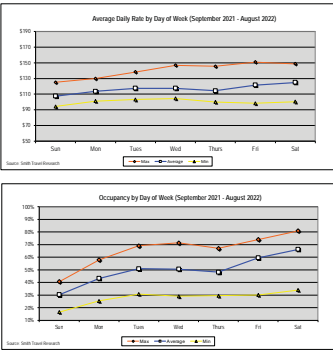


Day of Week
ADR & Occupancy

The adjacent tables detail the weekly performance of the local competitive set from September 2021 through August 2022.

Typically, group and corporate travel occurs from Sunday through Thursday, while leisure travel occupies Friday and Saturday. The highest rates in the competitive set are on weekends although they are not that much higher than the weekly rates.

On average, occupancy is greatest on Fridays and Saturdays, leading to a conclusion that leisure drives performance in the competitive set. Prior to the pandemic, corporate travel was a substantial demand driver during weekdays. However, corporate travel has not yet returned to the area in the same capacity where demand was stronger throughout the week prior the COVID-19 pandemic and restricted travel.



Heat Chart
ADR & Occupancy

The adjacent tables detail the weekly performance of the local competitive set by month from September 2021 through August 2022.

As shown, both rate and occupancy increase towards the weekends and early summer months, both times where leisure travelers tend to go on vacation. Throughout the year, Fridays and Saturdays recorded the highest average daily rate and strongest occupancy levels.

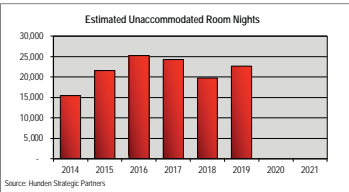
Table with 12 columns: Month, Sunday, Monday, Tuesday, Wednesday, Thursday, Friday, Saturday, and Aug. The table shows ADR by Day of Week by Month from September 2021 to August 2022. The data shows a clear seasonal trend with higher rates and occupancy in the summer months.

Unaccommodated Room Nights

Unaccommodated room nights are described as excess demand for hotel room nights produced by lodgers who are displaced because they are unable to book a room in the hotel of their choice due to it being sold out.

The adjacent tables detail the annual estimated unaccommodated room nights.

2016 and 2017 had the greatest amount of excess demand that could not be accommodated at nearly 25,000 and 24,500 room nights, respectively.



Interviews & Feedback
Hoteliers

HSP interviewed upper-level management at the Home2 Suites Dublin, Courtyard Dublin and Embassy Suites within the Dublin hospitality market to better understand demand drivers and overall performance within the market. The following key implications were drawn:

- The Home2 Suites in Dublin typically accommodates corporate travel throughout the week and group business on weekends given the room layouts and style of hotel (double queen rooms with pull out sleeper sofas). The majority of group business comes from sports with demand picking up in early spring through Irish fest at the end of July, where they are booked every weekend.
- The Courtyard in Dublin was primarily a corporate travel hotel prior to the COVID-19 pandemic; however, corporate travel has taken longer to recover and is still not at full operations. The hotel has shifted to more of a group and leisure-oriented hotel given the onsite amenities and room layouts, where half of the rooms are two queen beds and the other king rooms with sleeper sofas.
- The Embassy Suites in Dublin sees a 60 / 40 mix of group/leisure and corporate travel. Given the limited supply of tournament facilities in the area, the hotel has seen longer stays from Thursday to Sunday versus just the weekend since sports have to compete for field space or indoor space.
- The sports demand comes from a combination of Ohio residents and out-of-state visitors given the tournament schedules. The local hotels often see teams competing at facilities in Downtown Columbus wanting to stay at hotels in Dublin given the local infrastructure, group-friendly rates and safety aspect. However, even if teams do not stay at Dublin properties, hotels still see compression.
- Hotels are interested in a higher caliber of youth sports tournaments that can drive visitation during the slower winter months, which is more focused around hockey, basketball and volleyball indoor events.



Hotel Market Implications

HSP analyzed the current hospitality market conditions in the Dublin area and how a potential sports facility development would perform and complement the hotel market. Key takeaways are as follows:

- There is currently an adequate supply of hotel rooms to meet demand especially with a continual supply of new hotels coming to market each year. ADR has recovered to pre-pandemic levels, but occupancy is still significantly lower largely due to the lack of corporate travel.
- Youth sports has been a big demand driver in the spring, summer and fall months. Leisure travel is also at its highest in the summer months.
- Youth sports teams look for properties with significant double queen rooms at an affordable price.
- Additional outdoor youth sports components would create a higher caliber of tournaments that would apply more pressure to the hotels during peak season. Turf fields extend the calendar availability for outdoor sports tournaments, extending the need for hotel room nights into the slower, winter months that currently cannot support outdoor tournaments. The Project's indoor sports component also would help increase occupancy in these slower months by catering to basketball, volleyball and other winter sports, generate greater economic impact for the area.





# Retail & Restaurant Market Analysis

## Retail & Restaurant

### Implications

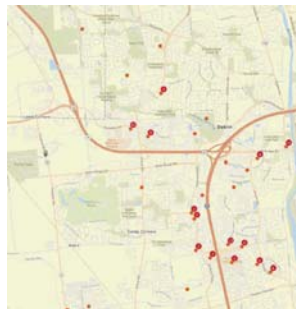
The major restaurant and retail clusters closest to Darree Fields are Dublin Green Shopping Center, Valley Road Retail Center and Perimeter Center.

Dublin Green Shopping Center is one of the newer developments in the area opening in 2019 with a Costco, Walgreens, and roughly six restaurants that range from fast food to casual dining options.

Valley Road Retail Center is a shopping center with a larger grocery store and an array of dining options that range from fast food to casual dining options.

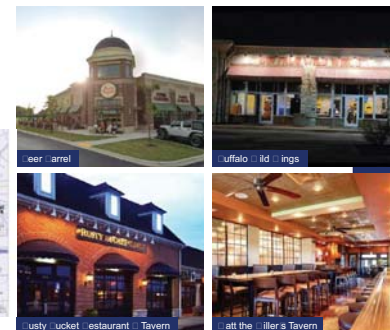
Perimeter Center is a shopping center across the street from Valley Road Retail Center. The Perimeter Center is anchored by Giant Eagle Supermarket and offers fast food options and casual sit-down chain restaurants as well.

The City of Dublin promotes an extensive list of retail and restaurant options such as the new mixed-use development known as Ridge Park that is about 5.5 miles from Darree Fields. However, the restaurants are not as group-friendly compared to the restaurants by the Project due to limited availability and higher-end establishments.



## Restaurant Implications

HSP selected a few retail restaurant offerings to highlight as they are group-friendly and supportive of the Project.



## Retail & Restaurant Market Implications

The following implications were drawn from HSP's retail and restaurant analysis:

- A cluster of retailers and restaurants creates critical mass, which makes a location more favorable to live and play.
- Retail restaurant nodes are an important factor for sports as they provide youth sports participants and attendees with an array of offerings before and after sports practices and tournaments.
- Dublin has numerous retail and restaurant clusters along U.S. Route 101, off of which the closest being Dublin Green Shopping Center to Darree Fields.
- A major youth sports development will facilitate future growth in retail and restaurant offerings closer to the Project. Currently, the Dublin Green Shopping Center is the closest with a limited supply that is catered toward group-friendly business, however, increased visitation to the area provided by the Project would result in higher demand for commercial development near the site.
- Youth sports facilities provide local restaurants and retail businesses with tremendous incremental spending throughout the year. An indoor and outdoor sports complex has the potential to provide local restaurants and retail with increased visitation throughout the calendar year.



## Visitor Origin

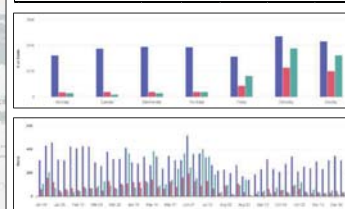
In 2021, TBC Bank Sports Complex attracted over 2.5 million visitors. Increased visitation beyond 75 miles between Friday and Sunday shows the success of tournament play at the facility. The facility was busiest between April and July, during the prime seasons for basketball, baseball and softball.

Home Location of Visitors to TBC Bank Sports Complex (2021)



Visitor Origin by Distance from Site	Total Visits Est. Number of Visits	Percent of Total Visits	Total Unique Customers Est. Number of Customers	Percent of Total Customers	Avg. Visits per Customer
Locals - Within 25 miles	1,000,000	42%	500,000	20%	5.0
Regional Distance - Between 25 and 75 miles	200,000	8%	100,000	4%	2.0
Long Distance - 75+ Miles (Out of State)	1,500,000	60%	750,000	36%	2.0
<b>Total Visits</b>	<b>2,500,000</b>	<b>100%</b>	<b>1,250,000</b>	<b>100%</b>	<b>2.0</b>

Source: Promix



## Rocky Top Sports World

Battleground, TN

Approximately 100,000

Approximately 100,000

Approximately 100,000

Approximately 100,000

Approximately 100,000

Approximately 100,000

Approximately 100,000

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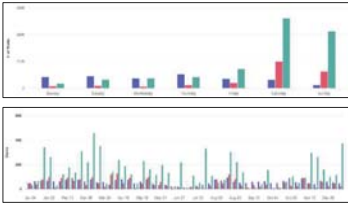
## Rocky Top Sports World - Origin of Visitation

Rocky Top Sports World leverages the tourism scene of Gatlinburg, attracting 59 percent of total visitation in 2021 from over 75 miles away from the facility. The facility draws visitation from all over the Midwest and South, including Columbus, Dayton and Cincinnati.



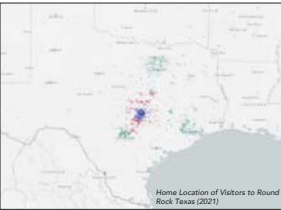
Rocky Top Sports World - Gatlinburg, TN						
January 2021 - December 2021						
Visitor Origins by Distance from Site	Total Visits		Total Unique Customers		Avg. Visits per Customer	
	Est. Number of Visits	Percent of Total Visits	Est. Number of Customers	Percent of Total Customers		
Locals - Within 25 miles	296,700	22%	30,300	7%	9.73	
Regional Distance - Between 25 and 75 miles	252,400	19%	90,400	21%	2.79	
Long Distance only - Over 75 miles	387,600	59%	217,900	52%	1.78	
Total Visits	1,236,700	100%	428,600	100%	1.00	

Source: Photo AI



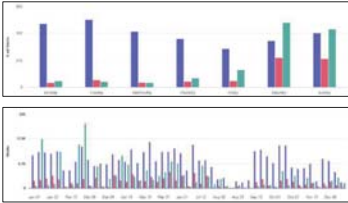
## Round Rock Texas Visitation

In 2021, Round Rock is located between many of Texas' major cities including Austin, Dallas, San Antonio and Houston and induced strong visitation across the state. The Sports Center is the city's indoor complex shows that a facility of the recommended size of the Project induces strong visitation for tournaments throughout the weekends during the year.



Round Rock Sports Center - Round Rock, TX						
January 2021 - December 2021						
Visitors Origin by Distance from Site		Total Visits		Total Unique Customers		Avg. Visits per Customer
		Est. Number of Visits	Percent of Total Visits	Est. Number of Unique Customers	Percent of Total Customers	
Locals - Within 25 miles		368,500	60%	58,100	41%	8.30
Regional Distance - Between 25 and 75 miles		86,700	14%	23,700	17%	3.66
Long Distance only - Over 75 miles		163,000	26%	60,900	42%	2.68
Total Visits		619,200	100%	142,600	100%	4.34

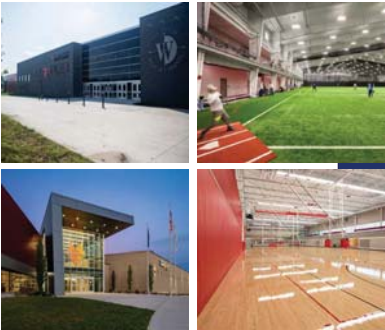
Source: Placer.ai



## Other Case Studies Funding Methods

**MidAmerican Energy Company Rectplex -** The facility cost roughly \$45 million and was funded through a public-private partnership. The combined funding comes from \$16.5 million in bonds that will be paid back through sales tax increases, an additional \$16.5 million in bonds that will be paid back through an increase of hotel tax, \$12.4 million of corporate pledges and donations. The rest of the funding was covered by grants, loans, and future tax revenues.

**Community First Champion Center -** The facility cost roughly \$30 million and is funded by an increase in local hotel tax. The Fox Cities Sports Development, Inc. (a subsidiary of the Fox Cities CVB) manages the hotel taxes generated by the Champion Center and on a quarterly basis, a percentage of the hotel taxes are dedicated to paying off bonds used to fund the project.



## Implications

- Major youth sports complexes draw in from all across the nation for major tournaments and cover hundreds of acres, have numerous fields and playing surfaces and have high-end supplemental amenities.
- It is critical to form partnerships with organizations to keep the facility rented out consistently and receive a stable stream of cash flows.
- The feasibility and success of these complexes hinges on the organizational structure, whether it be privately funded, city owned and operated, or set up as a non-profit organization.
- Indoor facilities must be flexible, be open to a variety of event types and uses, and always be creative with branding and exposure.
- The medium-sized facilities with playing surfaces under twelve per type, commonly attract local, state-wide, and regional audiences.
- Support amenities for the families that are travelling to watch their children play are crucial, including food and beverage, entertainment, and hotels and accommodations.



# 10

## Operational Standards & Management Strategy



## What is the Industry Doing?

- More cities are moving to independent entities (boards, authorities, local government corporations, etc.) to own and sustain their major event facilities. This move to an independent model occurs especially as facilities and complexes become larger and more important to the local economy. The larger the facility or complex, the more likely the move to an independent entity. This both protects the complex from funding issues in general governments and politics, and provides a competitive, mission-focused entity to oversee the long-term success of a public-private benefit enterprise.
- More cities are moving to private, contracted management regardless of ownership. It is nearly unheard of for a facility to move from private management back to public, but every year, additional cities move to private management to mitigate many of the issues noted above. With a move to private management, there is more accountability, ability to hire / fire, and a focus on key performance indicators (KPIs), such as revenue, expense, room nights, customer service, and others. HSP has interviewed many cities who have made the change to private management for youth sports facilities and witnessed positive results.
- Focus on Efficiency of Structure and Process. Cities have worked to treat sports complexes like the competitive businesses that they are, coordination amongst the sales organization, facilities, and hotels is critical. The most successful structures include weekly, monthly, quarterly, and annual coordination amongst sales entities at the buildings, hotels, and the DCO. To take it one step further, the most aggressive cities are combining the sales force at the building with the DCO to be one entity. In the case of some, the two sales staffs (building and DCO) are co-located in the same office to shorten the communication loop.
- Ensures that the Governance and Structure is Solid. Most strong structures include appointments to their boards from people who know the hospitality and event industry and who can ask the right questions of management and contractors. Political appointees without industry background are minimized. The funding streams are also protected for the facilities and DCO.



Governance

- Governance is defined as the system by which entities are directed and controlled. It is concerned with the structure and processes for decision making, accountability, control, and behavior at the top of an entity. Governance influences how an organization's objectives are set and achieved, how risk is monitored and addressed, and how performance is optimized.
- Governance is a system and process, and successful implementation of a good governance strategy requires strategic planning, risk management, and performance management. Organizations that lack good governance are rarely able to perform optimally. Governance is important in preserving and strengthening stakeholder confidence. Good governance allows the organization to create a culture and foundation of **high-performance** and **optimal operations**. Good governance is also key in ensuring that an organization is able to **rapidly respond and adapt** to a changing external environment.
- While good governance does not guarantee success, organizations with poor governance are almost always destined to perform poorly or fail over the long term.

it Management

PROS	CONS
<ul style="list-style-type: none"><li>▪ Long-term employees</li><li>▪ No management fees</li><li>▪ Can focus on priorities beyond profit</li><li>▪ Consistency</li></ul>	<ul style="list-style-type: none"><li>▪ Lack of experience results in less effective operations</li><li>▪ Employees do not have an incentive structure to inspire and motivate exceptional service; tough to attract aggressive, proactive employees</li><li>▪ Some employees just "put in their time"</li><li>▪ Bureaucracy and red-tape can cause delays</li><li>▪ Political pressures</li><li>▪ Duplication of efforts among facilities</li><li>▪ More reactive than proactive</li></ul>

Contracted Private Management

PROS	CONS
<ul style="list-style-type: none"><li>▪ Access to talent across their network, vendor relationships, etc.</li><li>▪ Competition drives improvement</li><li>▪ Incentives can spur high performance</li><li>▪ Experienced staff that understand how to maximize revenue and minimize expenses</li><li>▪ Can separate the main organization / city from tough decisions (personnel, payroll, etc.)</li></ul>	<ul style="list-style-type: none"><li>▪ Learning curve as new staff comes into facility</li><li>▪ Increased management fees, though should be tied to improved performance metrics</li></ul>

Tenant Lease Management Model

- Facilities such as Grand Park in Westfield, Indiana operate under the tenant lease management model. Under this model, the facility leases out space to anchor tenants and allows them to operate within the complex. Teams are free to use the facility for practices, games, tournaments etc., but are responsible for operating expenses and fees. Given that the tenants are in the business of sports, they are often well-equipped to produce and promote tournaments that generate revenue for the tenant and better cover expenses. These teams make lease payments to the facility, providing the facility with stable revenue sources.

Food & Beverage

As a subset of operations, catering / food & beverage service can be handled in a variety of ways including:

- In-House
- Exclusive
- Contracted Management

Catering and F&B are important aspects of any decision as they can provide a legitimate revenue stream for facilities. They are particularly important to contracted private management due to the incentives based on their bottom line. Private managers have a variety of methods and vendor relationships to help lower losses and increase performance to the bottom line.

Benefits & Compensation

- Employee benefits and compensation are vital in the creation of a high-performing and successful facility or program. Competition to recruit and retain the most experienced and proven staff is strong in the meetings and events industry, and talented professionals will often choose the facilities that offer the strongest compensation packages and state-of-the-art facilities.
- City managed facilities are often restricted from offering strong packages due to budget and compensation limits. This structure has also been a deterrent to candidates due to separate focuses amongst facilities and departments. Some of the most qualified candidates for leadership are being recruited by and working for the private management sector where they can earn higher salaries and overall compensation due to incentives pay.



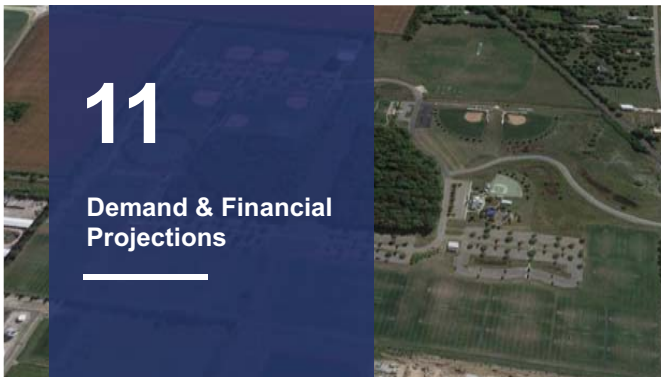
## Third-Party Management Implications

**Third-party private management structure benefits** include the following:

- Operating agreement between Manager and City (or quasi-public ownership entity):
  - Ownership partners maintain control through approval of operating and capital budgets
  - Ownership direction and supervision of policies
  - Renegotiated master service and vendor agreements with best practices programs and pricing
  - Human resources & professional development services tied to key performance indicators & efficiencies
  - Competitive venue management that includes operating, marketing, & hospitality services from a single group
  - Upgraded food & beverage service and offerings
  - Audio / visual innovation consulting & operating services & FF&E procurement
  - Transition of exemplary operating staff to Manager supervision under performance-based compensation – reduces heavy benefit loads related to government employees and reduces overall City staffing costs and increases venue performance

# 11

## Demand & Financial Projections



## Tournament Protections

The Project is projected to be completed over two phases. The first phase will focus on the outdoor components, including the multipurpose turf fields and the renovations to the grass fields. The second phase is projected to open in Year 3 and will focus on the indoor facility. Events highlighted in green are outdoor functions, while events highlighted in blue are indoor functions.

The sports complex is expected to host 18 events in Year 1 and 21 events in Year 2. Once the indoor facility is opened, the Project will host 51 events in Year 3 and stabilize at 74 events in Year 7.

The sports complex is expected to be utilized between 40 and 151 days per year for tournament and event activity. The majority of the event days are expected to be a result of multi-day events.

Specific Complex Region/Block & Division												
Area	1	2	3	4	5	6	7	8	9	10	11	12
Area 1 - 1st	1	1	1	1	1	1	1	1	1	1	1	1
Area 2 - 2nd	1	1	1	1	1	1	1	1	1	1	1	1
Area 3 - 3rd	1	1	1	1	1	1	1	1	1	1	1	1
Area 4 - 4th	1	1	1	1	1	1	1	1	1	1	1	1
Area 5 - 5th	1	1	1	1	1	1	1	1	1	1	1	1
Area 6 - 6th	1	1	1	1	1	1	1	1	1	1	1	1
Area 7 - 7th	1	1	1	1	1	1	1	1	1	1	1	1
Area 8 - 8th	1	1	1	1	1	1	1	1	1	1	1	1
Area 9 - 9th	1	1	1	1	1	1	1	1	1	1	1	1
Area 10 - 10th	1	1	1	1	1	1	1	1	1	1	1	1
Area 11 - 11th	1	1	1	1	1	1	1	1	1	1	1	1
Area 12 - 12th	1	1	1	1	1	1	1	1	1	1	1	1
Area 13 - 13th	1	1	1	1	1	1	1	1	1	1	1	1
Area 14 - 14th	1	1	1	1	1	1	1	1	1	1	1	1
Area 15 - 15th	1	1	1	1	1	1	1	1	1	1	1	1
Area 16 - 16th	1	1	1	1	1	1	1	1	1	1	1	1
Area 17 - 17th	1	1	1	1	1	1	1	1	1	1	1	1
Area 18 - 18th	1	1	1	1	1	1	1	1	1	1	1	1
Area 19 - 19th	1	1	1	1	1	1	1	1	1	1	1	1
Area 20 - 20th	1	1	1	1	1	1	1	1	1	1	1	1
Area 21 - 21st	1	1	1	1	1	1	1	1	1	1	1	1
Area 22 - 22nd	1	1	1	1	1	1	1	1	1	1	1	1
Area 23 - 23rd	1	1	1	1	1	1	1	1	1	1	1	1
Area 24 - 24th	1	1	1	1	1	1	1	1	1	1	1	1
Area 25 - 25th	1	1	1	1	1	1	1	1	1	1	1	1
Area 26 - 26th	1	1	1	1	1	1	1	1	1	1	1	1
Area 27 - 27th	1	1	1	1	1	1	1	1	1	1	1	1
Area 28 - 28th	1	1	1	1	1	1	1	1	1	1	1	1
Area 29 - 29th	1	1	1	1	1	1	1	1	1	1	1	1
Area 30 - 30th	1	1	1	1	1	1	1	1	1	1	1	1
Area 31 - 31st	1	1	1	1	1	1	1	1	1	1	1	1
Area 32 - 32nd	1	1	1	1	1	1	1	1	1	1	1	1
Area 33 - 33rd	1	1	1	1	1	1	1	1	1	1	1	1
Area 34 - 34th	1	1	1	1	1	1	1	1	1	1	1	1
Area 35 - 35th	1	1	1	1	1	1	1	1	1	1	1	1
Area 36 - 36th	1	1	1	1	1	1	1	1	1	1	1	1
Area 37 - 37th	1	1	1	1	1	1	1	1	1	1	1	1
Area 38 - 38th	1	1	1	1	1	1	1	1	1	1	1	1
Area 39 - 39th	1	1	1	1	1	1	1	1	1	1	1	1
Area 40 - 40th	1	1	1	1	1	1	1	1	1	1	1	1
Area 41 - 41st	1	1	1	1	1	1	1	1	1	1	1	1
Area 42 - 42nd	1	1	1	1	1	1	1	1	1	1	1	1
Area 43 - 43rd	1	1	1	1	1	1	1	1	1	1	1	1
Area 44 - 44th	1	1	1	1	1	1	1	1	1	1	1	1
Area 45 - 45th	1	1	1	1	1	1	1	1	1	1	1	1
Area 46 - 46th	1	1	1	1	1	1	1	1	1	1	1	1
Area 47 - 47th	1	1	1	1	1	1	1	1	1	1	1	1
Area 48 - 48th	1	1	1	1	1	1	1	1	1	1	1	1
Area 49 - 49th	1	1	1	1	1	1	1	1	1	1	1	1
Area 50 - 50th	1	1	1	1	1	1	1	1	1	1	1	1
Area 51 - 51st	1	1	1	1	1	1	1	1	1	1	1	1
Area 52 - 52nd	1	1	1	1	1	1	1	1	1	1	1	1
Area 53 - 53rd	1	1	1	1	1	1	1	1	1	1	1	1
Area 54 - 54th	1	1	1	1	1	1	1	1	1	1	1	1
Area 55 - 55th	1	1	1	1	1	1	1	1	1	1	1	1
Area 56 - 56th	1	1	1	1	1	1	1	1	1	1	1	1
Area 57 - 57th	1	1	1	1	1	1	1	1	1	1	1	1
Area 58 - 58th	1	1	1	1	1	1	1	1	1	1	1	1
Area 59 - 59th	1	1	1	1	1	1	1	1	1	1	1	1
Area 60 - 60th	1	1	1	1	1	1	1	1	1	1	1	1
Area 61 - 61st	1	1	1	1	1	1	1	1	1	1	1	1
Area 62 - 62nd	1	1	1	1	1	1	1	1	1	1	1	1
Area 63 - 63rd	1	1	1	1	1	1	1	1	1	1	1	1
Area 64 - 64th	1	1	1	1	1	1	1	1	1	1	1	1
Area 65 - 65th	1	1	1	1	1	1	1	1	1	1	1	1
Area 66 - 66th	1	1	1	1	1	1	1	1	1	1	1	1
Area 67 - 67th	1	1	1	1	1	1	1	1	1	1	1	1
Area 68 - 68th	1	1	1	1	1	1	1	1	1	1	1	1
Area 69 - 69th	1	1	1	1	1	1	1	1	1	1	1	1
Area 70 - 70th	1	1	1	1	1	1	1	1	1	1	1	1
Area 71 - 71st	1	1	1	1	1	1	1	1	1	1	1	1
Area 72 - 72nd	1	1	1	1	1	1	1	1	1	1	1	1
Area 73 - 73rd	1	1	1	1	1	1	1	1	1	1	1	1
Area 74 - 74th	1	1	1	1	1	1	1	1	1	1	1	1
Area 75 - 75th	1	1	1	1	1	1	1	1	1	1	1	1
Area 76 - 76th	1	1	1	1	1	1	1	1	1	1	1	1
Area 77 - 77th	1	1	1	1	1	1	1	1	1	1	1	1
Area 78 - 78th	1	1	1	1	1	1	1	1	1	1	1	1
Area 79 - 79th	1	1	1	1	1	1	1	1	1	1	1	1
Area 80 - 80th	1	1	1	1	1	1	1	1	1	1	1	1
Area 81 - 81st	1	1	1	1	1	1	1	1	1	1	1	1
Area 82 - 82nd	1	1	1	1	1	1	1	1	1	1	1	1
Area 83 - 83rd	1	1	1	1	1	1	1	1	1	1	1	1
Area 84 - 84th	1	1	1	1	1	1	1	1	1	1	1	1
Area 85 - 85th	1	1	1	1	1	1	1	1	1	1	1	1
Area 86 - 86th	1	1	1	1	1	1	1	1	1	1	1	1
Area 87 - 87th	1	1	1	1	1	1	1	1	1	1	1	1
Area 88 - 88th	1	1	1	1	1	1	1	1	1	1	1	1
Area 89 - 89th	1	1	1	1	1	1	1	1	1	1	1	1
Area 90 - 90th	1	1	1	1	1	1	1	1	1	1	1	1
Area 91 - 91st	1	1	1	1	1	1	1	1	1	1	1	1
Area 92 - 92nd	1	1	1	1	1	1	1	1	1	1	1	1
Area 93 - 93rd	1	1	1	1	1	1	1	1	1	1	1	1
Area 94 - 94th	1	1	1	1	1	1	1	1	1	1	1	1
Area 95 - 95th	1	1	1	1	1	1	1	1	1	1	1	1
Area 96 - 96th	1	1	1	1	1	1	1	1	1	1	1	1
Area 97 - 97th	1	1	1	1	1	1	1	1	1	1	1	1
Area 98 - 98th	1	1	1	1	1	1	1	1	1	1	1	1
Area 99 - 99th	1	1	1	1	1	1	1	1	1	1	1	1
Area 100 - 100th	1	1	1	1	1	1	1	1	1	1	1	1
Area 101 - 101st	1	1	1	1	1	1	1	1	1	1	1	1
Area 102 - 102nd	1	1	1	1	1	1	1	1	1	1	1	1
Area 103 - 103rd	1	1	1	1	1	1	1	1	1	1	1	1
Area 104 - 104th	1	1	1	1	1	1	1	1	1	1	1	1
Area 105 - 105th	1	1	1	1	1	1	1	1	1	1	1	1
Area 106 - 106th	1	1	1	1	1	1	1	1	1	1	1	1
Area 107 - 107th	1	1	1	1	1	1	1	1	1	1	1	1
Area 108 - 108th	1	1	1	1	1	1	1	1	1	1	1	1
Area 109 - 109th	1	1	1	1	1	1	1	1	1	1	1	1
Area 110 - 110th	1	1	1	1	1	1	1	1	1	1	1	1
Area 111 - 111st	1	1	1	1	1	1	1	1	1	1	1	1
Area 112 - 112nd	1	1	1	1	1	1	1	1	1	1	1	1
Area 113 - 113rd	1	1	1	1	1	1	1	1	1	1	1	1
Area 114 - 114th	1	1	1	1	1	1	1	1	1	1	1	1
Area 115 - 115th	1	1	1	1	1	1	1	1	1	1	1	1
Area 116 - 116th	1	1	1	1	1	1	1	1	1	1	1	1
Area 117 - 117th	1	1	1	1	1	1	1	1	1	1	1	1
Area 118 - 118th	1	1	1	1	1	1	1	1	1	1	1	1
Area 119 - 119th	1	1	1	1	1	1	1	1	1	1	1	1
Area 120 - 120th	1	1	1	1	1	1	1	1	1	1	1	1
Area 121 - 121st	1	1	1	1	1	1	1	1	1	1	1	1
Area 122 - 122nd	1	1	1	1	1	1	1	1	1	1	1	1
Area 123 - 123rd	1	1	1	1	1	1	1	1	1	1	1	1
Area 124 - 124th	1	1	1	1	1	1	1	1	1	1	1	1
Area 125 - 125th	1	1	1	1	1	1	1	1	1	1	1	1
Area 126 - 126th	1	1	1	1	1	1	1	1	1	1	1	1
Area 127 - 127th	1	1	1	1	1	1	1	1	1	1	1	1
Area 128 - 128th	1	1	1	1	1	1	1	1	1	1	1	1
Area 129 - 129th	1	1	1	1	1	1	1	1	1	1	1	1
Area 130 - 130th	1	1	1	1	1	1	1	1	1	1	1	1
Area 131 - 131st	1	1	1	1	1	1	1	1	1	1	1	1
Area 132 - 132nd	1	1	1	1	1	1	1	1	1	1	1	1
Area 133 - 133rd	1	1	1	1	1	1	1	1	1	1	1	1
Area 134 - 134th	1	1	1	1	1	1	1	1	1	1	1	1
Area 135 - 135th	1	1	1	1	1	1	1	1	1	1	1	1
Area 136 - 136th	1	1	1	1	1	1	1	1	1			

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## Attendance Projections

Rental hours during the week will play a key role in generating revenue for the facility. HSP projected the number of total rentable hours by surface type during weekdays and projected the total hours that each of these surfaces will be used.

At stabilization, HSP projects the rental utilization rate to be 70 percent for the multipurpose turf, 60 percent for grass fields, 60 percent for the softball diamonds and 65 percent for the court space.

Daily rentals account for the majority of attendance projections, followed by soccer tournaments. Once the indoor facility is stabilized in Year 7, HSP projects over 780,000 annual visitors to the Project.

[illegible]Source: [Harden Strategic Partners](#)

## Proforma

Company's Complete Projections & Performance												
	Q1	Q2	Q3	Q4	Q1	Q2	Q3	Q4	Q1	Q2	Q3	Q4
<b>Revenue (USD)</b>												
Product Revenue	1,200	1,300	1,400	1,500	1,300	1,400	1,500	1,600	1,400	1,500	1,600	1,700
Service Revenue	800	850	900	950	850	900	950	1,000	900	950	1,000	1,050
Licensing & Royalties	300	320	340	360	320	340	360	380	340	360	380	400
Other Revenue	100	110	120	130	110	120	130	140	120	130	140	150
<b>Total Revenue</b>	<b>2,400</b>	<b>2,580</b>	<b>2,760</b>	<b>2,940</b>	<b>2,570</b>	<b>2,760</b>	<b>2,940</b>	<b>3,120</b>	<b>2,760</b>	<b>2,940</b>	<b>3,120</b>	<b>3,300</b>
<b>Expenses (USD)</b>												
Cost of Goods Sold	600	650	700	750	650	700	750	800	700	750	800	850
Operating Expenses	1,000	1,050	1,100	1,150	1,050	1,100	1,150	1,200	1,100	1,150	1,200	1,250
Depreciation & Amortization	200	210	220	230	210	220	230	240	220	230	240	250
Research & Development	150	160	170	180	160	170	180	190	170	180	190	200
Marketing & Sales	120	130	140	150	130	140	150	160	140	150	160	170
Administrative & Other	80	85	90	95	85	90	95	100	85	90	95	100
<b>Total Expenses</b>	<b>3,050</b>	<b>3,200</b>	<b>3,350</b>	<b>3,500</b>	<b>3,150</b>	<b>3,300</b>	<b>3,450</b>	<b>3,600</b>	<b>3,250</b>	<b>3,400</b>	<b>3,550</b>	<b>3,700</b>
<b>Profit (USD)</b>												
Gross Profit	1,800	1,930	2,060	2,190	1,920	2,060	2,190	2,320	2,060	2,190	2,320	2,450
Operating Profit	1,570	1,660	1,760	1,860	1,520	1,660	1,760	1,920	1,660	1,760	1,920	2,050
Net Profit	1,370	1,450	1,530	1,610	1,320	1,450	1,530	1,690	1,460	1,530	1,690	1,800
<b>Key Ratios</b>												
Gross Margin	75%	75.2%	75.4%	75.5%	74.7%	75.2%	75.4%	75.6%	74.7%	75.2%	75.4%	75.6%
Operating Margin	65.4%	65.5%	65.6%	65.7%	65.0%	65.5%	65.6%	65.8%	65.0%	65.5%	65.6%	65.8%
Net Profit Margin	57.1%	57.3%	57.5%	57.6%	55.3%	57.3%	57.5%	57.7%	55.3%	57.3%	57.5%	57.7%
<b>Summary</b>												
Revenue Growth (YoY)	10%	12%	14%	16%	8%	10%	12%	14%	10%	12%	14%	16%
Profit Growth (YoY)	8%	10%	12%	14%	6%	8%	10%	12%	8%	10%	12%	14%
Operating Leverage	1.2x	1.3x	1.4x	1.5x	1.1x	1.2x	1.3x	1.4x	1.1x	1.2x	1.3x	1.4x
Return on Assets	15%	16%	17%	18%	14%	16%	17%	18%	14%	16%	17%	18%
Return on Equity	20%	21%	22%	23%	19%	21%	22%	23%	19%	21%	22%	23%
Debt-to-Equity Ratio	0.5x	0.5x	0.5x	0.5x	0.5x	0.5x	0.5x	0.5x	0.5x	0.5x	0.5x	0.5x
Current Ratio	1.5x	1.6x	1.7x	1.8x	1.4x	1.5x	1.6x	1.7x	1.4x	1.5x	1.6x	1.7x
Interest Coverage Ratio	3.0x	3.2x	3.4x	3.6x	2.8x	3.0x	3.2x	3.4x	2.8x	3.0x	3.2x	3.4x
Free Cash Flow (USD)												

Mariusz Skrzypek, Editor

HSP projects that the Project will operate at a loss of \$172,000 in Year 1. When the indoor facility opens in Year 3, HSP projects the Project will operate at a loss of \$302,000. By Year 6, HSP projects the Project to operate at a profit. Over time, sports complexes develop a consistent and stable tournament model, leading to increasing operating margins. The most revenue is expected to come from space rentals, followed by net concessions/catering revenues.

The expenses shown in blue reflect the expenses projected at the opening of the outdoor components of the Project. In Year 3, General and administrative expenses are projected to increase by \$25,000, utilities are projected to increase by \$350,000, repairs and maintenance are projected to increase by \$150,000 and advertising and other is expected to increase by \$20,000 (all expenses are adjusted for inflation).

## Dear & Dear Staffing

The adjacent table outlines the potential staffing summary for the Project and the estimated payroll cost before the indoor facility is opened.

There will likely be additional staffing needs of general staff, program coordinators and support staff

Position	Salary	Benefits (40%)
General Manager	\$70,000	\$28,000
Director of Operations	\$50,000	\$20,000
Marketing & Business Development	\$42,000	\$16,800
Sales Coordinator - Outdoor	\$40,000	\$16,000
Program Coordinator - Softball	\$35,000	\$14,000
Program Coordinator - Baseball	\$35,000	\$14,000
Program Coordinator - Soccer	\$35,000	\$14,000
Program Coordinator - Other	\$35,000	\$14,000
Facility Manager	\$35,000	\$14,000
Finance Manager	\$25,000	\$10,000
General Staff (Concessions, Maintenance, etc.)	\$27,500	\$11,000
General Staff (Concessions, Maintenance, etc.)	\$27,500	\$11,000
Admin Support - Outdoor	\$25,000	\$10,000
Janitorial (2 Staff Members)	\$50,000	\$20,000
<b>Total</b>	<b>\$542,000</b>	<b>\$216,800</b>
<b>Combined Total</b>		<b>\$758,800</b>

Source: HSP

Source: HSP



# Year 1 Total Year 2 Staffing Summary

The adjacent table outlines the potential staffing summary for the Project and the estimated payroll cost after the indoor facility is opened.

HSP projects higher salaries for existing employees and additional staffing needs for indoor programs, concessions, maintenance and janitorial services upon the opening of the indoor facility.

Facility Staffing Summary		
Position	Salary	Benefits (80%)
General Manager	\$82,250	\$32,900
Director of Operations	\$60,000	\$24,000
Marketing & Business Development	\$50,000	\$20,000
Sales Coordinator - Indoor	\$40,000	\$16,000
Sales Coordinator - Outdoor	\$40,000	\$16,000
Program Coordinator - Basketball	\$35,000	\$14,000
Program Coordinator - Volleyball	\$35,000	\$14,000
Program Coordinator - Baseball	\$35,000	\$14,000
Program Coordinator - Softball	\$35,000	\$14,000
Program Coordinator - Soccer	\$35,000	\$14,000
Program Coordinator - Other	\$35,000	\$14,000
Facility Manager	\$42,500	\$17,000
Finance Manager	\$42,500	\$17,000
General Staff (Concessions, Maintenance, etc.)	\$27,500	\$11,000
General Staff (Concessions, Maintenance, etc.)	\$27,500	\$11,000
General Staff (Concessions, Maintenance, etc.)	\$27,500	\$11,000
General Staff (Concessions, Maintenance, etc.)	\$27,500	\$11,000
Admin Support - Indoor	\$25,000	\$10,000
Admin Support - Outdoor	\$25,000	\$10,000
Janitorial (8 Staff Members)	\$125,000	\$50,000
Total	\$852,250	\$341,900
Combined Total		\$1,194,150

Source: HSP

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# Introduction to Impacts

HSP uses the IMPLAN input-output multiplier model, which determines the level of additional activity in the Dublin economy due to additional inputs. For example, for every dollar of direct new spending in Dublin, the IMPLAN model provides multipliers for the indirect and induced spending that will result.

The net new and recaptured direct spending discussed earlier in the chapter is considered to be the **Direct Impact**.

From the direct spending figures, further impact analyses will be completed.

**Indirect Impacts** are the supply of goods and services resulting from the initial direct spending. For example, a visitor's direct expenditure on a hotel room causes the hotel to purchase linens and other items from suppliers. The portion of these hotel purchases that are within the local economy is considered an indirect economic impact.

**Induced Impacts** embody the change in spending due to the personal expenditures by employees whose incomes are affected by direct and indirect spending. For example, a waitress at a restaurant may have more personal income as a result of the induced customer's visit. The amount of the increased income that the employee spends in the area is considered an induced impact.

**Fiscal Impacts** represent the incremental tax revenue collected by the City of Dublin due to the net new economic activity. The fiscal impact represents the government's share of total economic benefit. The most relevant tax streams that flows directly to the City of Dublin include income tax and hotel accommodations tax.

**Employment Impacts** include the incremental employment provided not only onsite, but due to the spending associated with it. For example, the direct, indirect and induced impacts generate spending, support new and ongoing businesses, and ultimately result in ongoing employment for citizens. HSP will show the number of ongoing jobs supported by the project and provide the resulting income generated.

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# Net New Earnings & Full-Time Equivalent Jobs

Jobs will be created onsite as well as offsite from the direct, indirect and induced spending. Over 30 years net new earnings within Dublin is expected total nearly \$1.4 billion, supporting an average of 794 new jobs over 30 years.

Net New Earnings & FTE Jobs from Direct, Indirect & Induced Spending (000s) - Sports Complex													
	Year 1	Year 2	Year 3	Year 4	Year 5	Year 6	Year 7	Year 8	Year 9	Year 10	Year 20	Year 30	Total
Net New Earnings													
From Direct	\$ 8,259	\$ 9,626	\$ 15,855	\$ 18,414	\$ 21,544	\$ 22,908	\$ 24,333	\$ 25,863	\$ 26,590	\$ 35,734	\$ 48,004	\$ 494,576	
From Indirect	\$ 2,472	\$ 2,942	\$ 4,729	\$ 5,493	\$ 6,425	\$ 6,829	\$ 7,252	\$ 7,470	\$ 7,694	\$ 7,925	\$ 10,650	\$ 14,313	\$ 278,545
From Induced	\$ 1,596	\$ 1,903	\$ 3,065	\$ 3,560	\$ 4,164	\$ 4,428	\$ 4,703	\$ 4,884	\$ 4,989	\$ 5,139	\$ 6,906	\$ 9,280	\$ 188,613
Total	\$ 12,328	\$ 14,469	\$ 23,650	\$ 27,466	\$ 32,134	\$ 34,165	\$ 36,288	\$ 37,377	\$ 38,498	\$ 39,653	\$ 52,291	\$ 71,618	\$ 1,392,694
Net New FTE Jobs													
From Direct	210	242	380	428	486	502	518	518	518	518	518	518	489
From Indirect	85	98	154	173	197	203	209	209	209	209	209	209	198
From Induced	46	53	83	94	106	110	113	113	113	113	113	113	107
Total	340	393	616	695	789	815	841	841	841	841	841	841	794

Source: Hudson Strategic Partners

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# Summary of Impacts

Over 30 years the Project is expected to generate more than \$3.2 billion in net new spending, \$1.39 billion in net new earnings and 841 net new full-time equivalent jobs.

Over 30 years, the City of Dublin will experience an additional \$40.6 million in income tax and hotel accommodations tax.

HSP assumed that two percent of the projects total labor and materials would be sourced from within Dublin.

30-Yr. Summary of Impacts - Sports Complex	
Net New Spending	(billions)
Direct	\$2,009
Indirect	\$779
Induced	\$1,656
Total	\$3,214
Net New Earnings	(billions)
From Direct	\$935
From Indirect	\$279
From Induced	\$183
Total	\$1,397
Net New FTE Jobs	Actual
From Direct	518
From Indirect	209
From Induced	113
Total	841
Capitable City Taxes	(billions)
Income Tax - City (2.0%)	\$27.9
Hotel Tax - City (0.7%)	\$12.7
Total	\$40.6
Capitable Local Total	\$40.6
Construction Impact	\$9.03
Total	\$49.6

Source: Hudson Strategic Partners

Construction Impacts - Outdoor Sports Complex	
Development Cost	(billions)
Labor (6%)	\$18,786
Materials (8%)	\$25,030
Total	\$43,816
% Labor in Dublin	2%
% Materials in Dublin	2%
Taxes General and (80%)	15%
Income Tax - City (2.0%)	1%
Job Years From Construction	11

Construction Impacts - Indoor Sports Complex	
Development Cost	(billions)
Labor (6%)	\$64,440
Materials (8%)	\$23,040
Total	\$87,480
% Labor in Dublin	2%
% Materials in Dublin	2%
Taxes General and (80%)	15%
Income Tax - City (2.0%)	1%
Job Years From Construction	12

Source: Hudson Strategic Partners

# SWOT Analysis

The following SWOT analysis details the strength, weaknesses, opportunities and threats related to the proposed youth sports facility in Dublin, Ohio.

STRENGTHS	OPPORTUNITIES	WEAKNESSES	THREATS
<ul style="list-style-type: none"><li>Growing population and strong local user base between DYA and club sports</li><li>Strategic location within the state of Ohio and the Midwest</li><li>No major competitive field sport or indoor facilities within Columbus</li></ul>	<ul style="list-style-type: none"><li>Youth sports complex, w/ indoor/outdoor components to serve variety of sports</li><li>Local facilities for recreation and quality of life</li><li>Long duration of play, daily and seasonally w/ synthetic turf &amp; lights</li><li>Private sector partnerships</li><li>Sports Tourism</li></ul>	<ul style="list-style-type: none"><li>Lack of quality indoor and outdoor facilities that has led to decreasing and lost business</li><li>Lack of turf and lighted spaces that restrict scheduling</li><li>Lack of development around Darree Fields</li></ul>	<ul style="list-style-type: none"><li>Other proposed, competing facilities with the Columbus market</li><li>Regional competition for tournaments at established facilities</li><li>Private indoor facilities in neighboring cities</li><li>Competing interests between club and recreational usage</li></ul>

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## How to Capitalize on Strengths & Mitigate Weaknesses

The following key headlines outline ways Dublin can both leverage their strengths and mitigate some of their weaknesses with the proposed youth sports complex.

### Strong Local/Regional Demand

Club teams and DUBLIN have experienced strong growth concurrent with the population growth. Indoor and outdoor clubs and organizations have expressed that the lack available court and field time has restricted growth of their programs. Dublin and its surrounding cities have a strong demand base that can fill court and field space throughout the week within a large sports complex.

### Weak Supply Within Columbus

Provide the community with a central, high quality facility for indoor and outdoor sports. DUBLIN and club teams are in need of additional court and field time and have been restricted by the usage of local school spaces. A regional facility in Columbus has the potential to recapture demand that currently leaves the market for tournaments and induce tournament visitation from within the MIDWEST.

### Project Phasing & Critical Mass

Youth sports complexes have seen increasing costs, leading to the need of project phasing. Phasing will help with initial costs and allow for performance evaluation, assisting in identifying long term opportunities as the market changes. Further development of Darree Fields to make it a regional sports hub will require supporting development for retail, restaurants and hotels.

## Headlines – Dublin Youth Sports

The following bullets summarize the key findings and headlines in order to assess the viability of any project and make informed recommendations, there are still key elements that must be considered:

- Site Needs.** General site parameters for a successful youth sports facility include availability of land for current and future development, accessibility, proximity to hotel/restaurant nodes and flat topography. Roughly 100+ acres are typically needed for an indoor facility, depending on future expansion and parking. For a large outdoor complex, field count dependent, usually over 100+ acres is needed.
- The Industry.** The youth sports industry, specifically facility development, has experienced tremendous growth over the last several years. The industry is driving spending and overnight stays for all types of municipalities around the country. While many industries that fall under the tourism umbrella were hurt by the COVID-19 pandemic, the youth sports industry has stayed consistent in terms of driving economic impact for municipalities.
- The Supply & Demand.** Dublin has the opportunity to be the first mover in the Columbus area for a multi-purpose turf complex and a mid-sized indoor facility. Local demand for indoor and outdoor space is currently not being accommodated, leading to restricted field/court times and overall growth of organizations. The lack of facilities has led to decreasing participation of Dublin-based programs and decreased participation in local tournaments from teams that travel elsewhere.
- Case Studies.** Flexibility is a major ingredient to the success of youth sports developments. The ability to host a diverse mix of sporting events, and potentially non-sporting events will enhance the chances of a facility's success. Key on-site amenities that complement a major youth sports complex include food and beverage offerings, lounge/play areas for participants and fans, community space and physical therapy/sports performance space.

## Recommendations Overview

## Dublin Youth Sports: Recommendations

Based on the analysis of the youth sports market in the Dublin area, the region and interviews with market experts, tournament organizers, and other stakeholders, HSP recommends the development of an indoor & outdoor complex.

Upon full build-out HSP recommends the following:

- 8 full-sized multi-purpose, lighted turf fields
- 14 grass multi-purpose fields (soccer, lacrosse, archery, Australian rules football)
- 5 grass softball diamonds
- 9 hardwood basketball courts (12 volleyball)

Phasing will help with initial costs and assist in identifying long-term opportunities as the market changes. Ultimately, HSP recommends turf and lighted multi-purpose fields to extend the available time of play throughout the season and to protect against the current issues weather presents for sports activity in Dublin. The highest potential for outdoor youth sports tourism in Dublin is within field sports. In order to attract regional/national tournaments for outdoor field sports, Darree Fields needs to compete with the number of fields found at regional competitors. With 9 indoor basketball courts, (12 volleyball courts) Dublin will have the ability to host indoor sports tournaments, which is currently lacking in the greater Columbus area.

Darree Fields Redevelopment Detailed Recommendations				
Feature	Unit	Phase I		Total Build Out
		High Priority	Future Priority	
Outdoor Components				
Field Sports				
Multi-Purpose Artificial Turf Fields (Lighted)	Fields	8	-	8
Grass Fields	Fields	14	-	14
Total	Fields	22	-	22
Diamond/Sports				
Softball	Diamonds	5	-	5
Total	Diamonds	5	-	5
Indoor Components				
Basketball (Hardball)	Courts	-	9 (12)	9 (12)
Total	Courts	-	9 (12)	9 (12)
Source: HSP Conceptual Design				

Darree Fields Current Build Out		
Feature	Unit	Total
Outdoor Components		
Field Sports		
Grass Fields	Fields	18
Total	Fields	18
Diamond/Sports		
Hardwood Softball	Diamonds	7
Baseball Softball	Diamonds	1
Total	Diamonds	8
Source: W&L Dublin		