

# Market and Economic Analysis for a Proposed New Major League Lacrosse Stadium and Multi-Field Sports Complex at Green Branch Park in Prince George's County, Maryland



**Prepared for:**



**Presented by:**



**Final Report  
December 2012**



December 21, 2012

Mr. Eric Johnson  
Maryland Stadium Authority  
333 W. Camden St., Suite 500  
Baltimore, MD 21201

Dear Mr. Johnson:

Crossroads Consulting Services LLC (Crossroads Consulting) is pleased to present this market and economic analysis to the Maryland Stadium Authority (MSA) regarding a proposed new Major League Lacrosse (MLL) stadium and multi-field sports complex at Green Branch Park in Prince George's County, Maryland (County). In accordance with our agreement, this report summarizes our research and analysis which is intended to assist the MSA and the County with their decisions regarding the potential development of the proposed new complex.

The information contained in the report is based on estimates, assumptions, and information developed from market research, industry knowledge, input from potential demand generators, as well as other factors including data provided by the MSA, the County, and other secondary sources. We have utilized sources that are deemed to be reliable but cannot guarantee their accuracy. All information provided to us by others was not audited or verified and was assumed to be correct. Because the procedures were limited, we express no opinion or assurances of any kind on the achievability of any projected information contained herein and this report should not be relied upon for that purpose. Furthermore, there will be differences between projected and actual results because events and circumstances frequently do not occur as expected, and those differences may be material. We have no responsibility to update this report for events and circumstances that occur after the date of this report. The accompanying report is restricted to internal use by the MSA and the County and may not be relied upon by any third party for any purpose including financing. Notwithstanding these limitations, it is understood that this document may be subject to public information laws and as such can be made available to the public upon request.

Although you have authorized reports to be sent electronically for your convenience, only the final hard copy report should be viewed as our work product.

We have enjoyed serving you on this engagement and look forward to providing you with continued service in the future.

Sincerely,

*Crossroads Consulting Services LLC*

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## Project Background

The Maryland-National Capital Park and Planning Commission (M-NCPPC) is a bi-county agency serving Prince George’s and Montgomery Counties in Maryland. The original purpose of the M-NCPPC was to practice “long-range planning and park acquisition and development.” Since its inception, the M-NCPPC’s responsibilities have expanded to include administration of Prince George’s County’s public recreation program. The M-NCPPC operates and maintains more than 27,000 acres of parkland throughout the County including land developed to provide parks, picnic areas, athletic fields, historic sites, community centers, and recreation facilities as well as undeveloped green buffers and stream valley parks. In addition, the M-NCPPC operates and maintains more than 35,000 acres of parkland in Montgomery County. The M-NCPPC also oversees certain aspects of operations at Prince George’s Stadium, which is home to the Class AA Bowie Baysox minor league baseball team.

The M-NCPPC has prepared a master plan for the proposed new Green Branch Athletic Complex regional park which is located just south of Prince George’s Stadium. Phase 1 of the complex is slated to include the three irrigated softball fields with bleacher seating; three irrigated combination soccer/football fields with bleacher seating; a non-irrigated informal field area that can accommodate two youth size soccer fields; a central concession/restroom pavilion; a 8,800 square foot play area; picnic pavilions; a loop pedestrian trail; and 495 parking spaces. Although none of the fields will be lighted, underground conduit for future lighting will be provided as part of the Phase 1 development. These program elements are planned to be built on approximately 65 acres of the 319-acre parcel. The State allocated a \$1 million grant towards the development or improvement of Green Branch Athletic Complex in 2012 contingent on the County providing and expending a matching amount.

### Phase 1 – Concept Plan



Source: M-NCPPC.





In March of 2010, the Bayhawks announced the new ownership group: Hometown Lacrosse, LLC led by Bayhawks president Brendan Kelly. The Bayhawks also announced that the team name would be changed to the Chesapeake Bayhawks in order to include all areas of the region from Baltimore to Virginia and Washington, D.C. to the Eastern Shore. Total attendance for the Bayhawks has increased from approximately 26,500 for the six home games in 2010 season to 66,700 for the seven home games in 2012. Although team ownership is satisfied with its current home in Annapolis and the relationship with the U.S. Naval Academy, developing a new MLL stadium as part of the Phase 2 development at the Green Branch Athletic Complex presents a unique opportunity for consideration.

### **Purpose of the Study**

Given this backdrop, Crossroads Consulting was retained to assess specific market and economic issues associated with potentially developing a proposed new MLL stadium and multi-field sports complex at the Green Branch Athletic Complex. While the driving force of the Phase 1 development is to better meet the community's recreational needs, Phase 2 is envisioned to provide program elements and related infrastructure that attract an MLL stadium as well as competitive athletic tournaments and other activities that generate economic and fiscal impacts to the County and the State. This study is intended to serve as a resource for the M-NCPPC and the MSA in their future planning decisions regarding this project.

### **Work Plan**

The work plan included qualitative and quantitative analyses that focused on the unique attributes of Prince George's County, market supply relative to demand for the proposed new MLL stadium and multi-field sports complex, operating strategies, and project economics. Specific research tasks completed include, but were not limited to:

- Surveyed/interviewed stakeholders such as area governments and related agencies, the Chesapeake Bayhawks, educational institutions, the convention/visitor industry, the business community and others to obtain their input on the project.
- Reviewed previous studies related to the project to obtain a thorough background of the project.
- Summarized historical and projected industry trends to provide perspective on the growth and changes in lacrosse as well as an overview of its participants and their preferences.
- Analyzed market attributes such as trends and projections in population, age distribution and income; employment base; accessibility; hotel supply; tourism/visitor statistics; climate/seasonality; as well as existing and planned facilities.
- Reviewed available information regarding historical sports activity occurring in Prince George's County including the type of events, the number of events, average and total attendance, seasonality, and location held.
- Surveyed/interviewed representatives from area scholastic and collegiate programs; State, regional and national sports organizations; event producers of various special athletic events; concert/entertainment promoters; and others to assess potential demand for the proposed MLL stadium/multi-field sports complex and required program elements.



- Analyzed data from a select number of competitive/comparable facilities.
- Commented on the proposed MLL stadium and multi-field sports complex's building program and its ability to address the needs of potential target markets including MLL and other activities that draw out-of-town attendees.
- Estimated potential usage/event activity as well as economic and fiscal benefits for both the proposed new MLL stadium and the multi-field sports complex.

## **Executive Summary**

### Overview of U.S. Lacrosse

Lacrosse has been one of the fastest growing sports in the U.S. The total number of lacrosse players, including youth, high school, collegiate, and professional/post-collegiate participants has grown from 254,000 in 2001 to 685,000 in 2011 which is an increase of 170%. Youth players have consistently comprised the largest number of players accounting for more than 361,000 or 53% of players in 2012. The number of men's and women's teams continues to increase at both the high school and collegiate levels.

There are two professional lacrosse leagues in the U.S. - National Lacrosse League (NLL) and MLL. NLL, which began in 1987 as a spinoff of the Major Indoor Lacrosse League, features six teams in the U.S. and three teams in Canada that play a 16-game season. In 2012, NLL total attendance was nearly 682,000 and average attendance per game was 9,470. As a point of reference, the Baltimore Thunder played at 1<sup>st</sup> Mariner Arena from 1987 to 1999 before becoming the Pittsburgh CrosseFire in 2000, the Washington Power in 2001 and the Colorado Mammoth in 2003.

MLL consisted of eight teams in 2012. MLL's goal is to expand to 16 teams in the next decade. Since its inception, MLL has fluctuated in both the number of teams and the number of home games played. Only four teams have been in existence since 2001 including the Bayhawks who have moved locations three times during that 12 year period. Four MLL teams folded after the 2008 season. In addition, the Toronto Nationals (which joined the league in 2009) relocated to Hamilton in 2011 and the Chicago Machine (which joined the league in 2006 and folded in 2010) relocated to Ohio for the 2012 season.

Because total attendance is directly impacted by both the number of teams and the number of games played in any given season, average attendance per game provides a solid measure of team performance. Average attendance per game for MLL has increased from nearly 3,900 in 2001 to 5,600 in 2012. Under the current ownership, the Bayhawks have increased their average attendance per game from 4,400 in 2010 to 9,500 in 2012.

## Market Analysis

The market analysis assessed various supply and demand factors that may influence the type and amount of event activity at the proposed new MLL stadium and multi-field sports complex. While there are several attributes that represent strengths in terms of the market potential associated with the proposed project including the area's tradition of lacrosse, demographics and geographic location/accessibility, there are several challenges associated with the proposed new MLL stadium in particular.

One of the major challenges is that the proposed 22,000-seat MLL stadium, which represents a significant capital construction cost, will only be used a limited number of times throughout the year and capacity is driven by a finite number of games and tournaments. The driving force of the stadium is for the Chesapeake Bayhawks. In 2012, the Bayhawks had the second highest total attendance in MLL. The team experienced a 17% increase in average attendance per game between 2011 and 2012. Given the new ownership group and their positive impact on the Bayhawks organization and brand, and their commitment to the organization, the upward trends in attendance are positive.

However, the league is still maturing and has experienced significant fluctuations in team base and attendance. Given the relatively limited number of teams, any major shift in performance, either positively or negatively, can have a significant impact on the overall success of the league. In general, the long-term stability of MLL presents a potential risk relative to viability of a MLL team serving as a tenant at the proposed new MLL stadium in Prince George's County.

In addition, the proposed stadium would face competition from other established professional sports teams and facilities in the Baltimore-Washington metro area. Further, many potential stadium events would represent a transfer of activity already occurring elsewhere in Maryland. Interviews also suggest that a 22,000-seat capacity stadium is larger than most user groups would need. Input from concert, family show and other special event promoters indicate there is limited demand for this type of activity at the proposed stadium.

In contrast, input from potential users suggests the ability to create a sports destination with the proposed multi-field sports complex that could accommodate a variety of sports at all levels of local youth and amateur athletics. The proposed multi-field sports complex would also provide an opportunity to develop and expand existing youth sports programs currently playing elsewhere. Youth sports have historically fared well during economic downturns whereas professional sports teams often struggle to maintain attendance.

Given the lack of similar facilities, nearly all of the potential activity at the MLL stadium and the multi-field sports complex would be incremental new to the County from an economic perspective. By contrast, only about 25% of the estimated event activity at the MLL stadium and 40% at the multi-field sports complex would be incremental new to the State since many of these events, such as Bayhawks games and youth/amateur sports tournaments, are occurring at other facilities in the State.

From a programming perspective, providing a high density of fields appears to be a solid plan and was supported by identified demand at local recreational, instructional, and competitive levels as well as for tournament activities. Providing lighted fields creates a longer day for use by all groups and extends the playing season in the Spring and Fall. Quality, lighted, well-maintained fields are very marketable and typically dictate a higher price for use. Maintaining “tournament quality” fields will be important in terms of the complex’s marketability and, as such, usage for recreational/instructional purposes should be relatively limited.

### Comparable Facilities Analysis

#### *MLL Stadiums*

None of the eight stadiums that currently host MLL teams are lacrosse-specific. Capacities of existing MLL stadiums range from 6,000 to 76,100. There are five teams playing in college-owned venues, one playing in an NFL stadium, and two playing in city-owned venues. All but one stadium are privately operated. Most of the profiled stadiums have undergone extensive improvements and upgrades to provide modern stadium amenities. Seven of the eight stadiums have an artificial field surface. Many MLL teams have played in multiple stadiums during their existence.

#### *Multi-Field Sports Complexes*

There are many other communities nationally that currently have multi-field sports complexes and others seeking to construct these types of facilities. There is significant competition among high-quality facilities. In order to maximize competitiveness, all aspects of the tournament industry will need to be considered.

Management at comparable sports complexes expressed the importance of developing a mission statement, booking priorities, operating strategies and funding sources that reflect the facility’s primary objective to drive sport tourism and related economic impact. There is a balance between soliciting tournament activity that generates economic impact and serving area residents. Successful complexes have an established partnership with a limited number of primary users (e.g., elite level local sports organizations) that exclusively book the majority of field time outside of tournament activity in order to maximize weekday usage and revenue.

Regardless of the final program and operating model, it is critical that any new facility in Prince George’s County is operated by personnel who specialize in marketing/management/programming of similar facilities. The management team should have established contacts and strong relationships with State/regional/national sports organizations including Maryland-based tournament promoters, national governing bodies for lacrosse, rugby, and soccer, intercollegiate conferences as well as area collegiate/scholastic/recreational sports entities in order to maximize marketability and usage.

Event Activity

The economic analysis is based on several factors including a hypothetical estimate of utilization that was developed from the research presented herein including input from the client group, market research, industry trends, historical attendance for the Bayhawks and other MLL teams, input from potential demand generators, the proposed building programs, information on comparable facilities as well as other research.

Event activity at new facilities typically experiences a “ramp up” period to a stabilized level of activity which occurs for several reasons. For instance, some groups that book their event several years in advance may not want to risk that a facility’s construction is delayed and not completed in time for their event. In addition, some groups may choose to let management “fine tune” its operations before meeting in a new facility. In addition, event promoters noted that attendance at many larger tournaments takes time to grow and mature in a new facility and geographic location. The overall utilization at any facility is typically dependent on a number of factors (e.g., market size; accessibility; nearby amenities; size, configuration and quality of the facilities offered; effectiveness of the management team in booking the facility; date availability; cost, etc.) and is rarely consistent. As such, estimated utilization shown in this report represents a stabilized year of operations.

*MLL Stadium*

The table below shows the estimated event activity at the proposed new MLL stadium which ranges from 16 to 18 events and 138,000 to 152,000 in total attendance. Based on market research, it is assumed that nearly all of the activity would be incremental new to the County whereas approximately 25% is assumed to be incremental new to the State. This incremental activity reflects new events as well as increased attendance at events currently taking place in other locations throughout Maryland with a new stadium.

<b>Estimated Event Activity - Proposed New MLL Stadium in Prince George's County</b>			
	<b>Number of Events</b>		
<b>Event Type</b>	<b>Range</b>		
MLL (Regular Season)	8	-	8
Other Sporting Events	2	-	3
Concerts/Festivals	1	-	1
Other Community Events	5	-	6
<b>Total</b>	<b>16</b>	<b>-</b>	<b>18</b>
	<b>Average Attendance</b>		
<b>Event Type</b>	<b>Range</b>		
MLL (Regular Season)	11,000	-	11,500
Other Sporting Events	5,000	-	5,000
Concerts/Festivals	15,000	-	15,000
Other Community Events	5,000	-	5,000
	<b>Total Attendance</b>		
<b>Event Type</b>	<b>Range</b>		
MLL (Regular Season)	88,000	-	92,000
Other Sporting Events	10,000	-	15,000
Concerts/Festivals	15,000	-	15,000
Other Community Events	25,000	-	30,000
<b>Total</b>	<b>138,000</b>	<b>-</b>	<b>152,000</b>



*Multi-Field Sports Complex*

Estimated event activity at the proposed new multi-field sports complex ranges from 18 to 20 tournaments and 306,000 to 345,000 in total attendance. Based on market research, it is assumed that nearly all of the activity would be incremental new to the County whereas approximately 40% is assumed to be incremental new to the State. This incremental activity reflects new events as well as increased attendance at events currently taking place in other locations throughout Maryland with a new multi-field sports complex.

<b>Estimate of Event Activity - Proposed New Multi-Field Sports Complex in Prince George's County</b>			
<b>Category</b>	<b>Range</b>		
<b>Season</b>	March 1 - November 30		
<b>Tournament Activity</b>			
Total Events	18	-	20
Total Event Days	36	-	40
Number of Participants	36,000	-	40,000
Number of Spectators	90,000	-	100,000
Average Length of Stay (Days)	2.0	-	2.0
Total Attendee Days	252,000	-	280,000
 Room Nights	 50,400	 -	 56,000
<b>League Activity</b>			
Total Participant Days	54,000	-	64,800
<b>Grand Total Attendee Days</b>	<b>306,000</b>	<b>-</b>	<b>344,800</b>

Tournaments include multi-day youth and amateur competitions in a variety of sports such as lacrosse, soccer, rugby, ultimate Frisbee and field hockey. These events may include teams from throughout Maryland, the surrounding region and/or national level competitions. League activity includes elite (or premier) club sport play for youth and amateurs in various sports such as lacrosse, soccer, rugby, ultimate Frisbee and field hockey. League activity at the proposed multi-field sports complex is not envisioned to include lower level play.

Economic and Fiscal Impact Analysis

Based on market research, the economic analysis focused on quantifying incremental new event activity and economic and fiscal impacts that could potentially be generated by the on-going operations of the proposed MLL stadium and multi-field sports complex. Economic benefits are measured in terms of spending, jobs and earnings. Fiscal benefits include both County level taxes (e.g., admissions and amusement, hotel/motel, local personal income) and State level taxes (e.g., corporate, personal, sales and use).

Although not quantified in this analysis, construction costs associated with development of the proposed MLL stadium and multi-field sports complex would provide additional economic and fiscal impacts to the County and State during the construction period.



Qualitative benefits associated with the proposed new MLL stadium and multi-field sports complex include enhancing the County’s appeal as a sports destination; receiving increased State, regional and national media exposure; providing a first-class stadium and complex for area residents and out-of-town attendees that complements other existing venues; enhancing the overall quality of life and livability of the area; capitalizing on existing and planned tourism efforts; serving as a catalyst for other potential development initiatives; as well as providing venues to retain and expand existing sports programs as well as develop new ones.

*MLL Stadium*

On-going activities at the proposed new MLL stadium are estimated to generate between \$7.4 million and \$8.1 million annually in incremental new direct spending to the County of which approximately \$2.0 million to \$2.2 million would be incremental new to the State.

Proposed New MLL Stadium in Prince George's County						
Estimated Annual Incremental Economic Benefits From On-Going Operations						
Category	Prince George's County			State of Maryland		
	Range			Range		
<b>Spending</b>						
Direct Spending	\$7,426,000	-	\$8,108,000	\$2,029,000	-	\$2,249,000
Indirect/Induced Spending	\$4,852,000	-	\$5,284,000	\$1,358,000	-	\$1,496,000
Total Spending	\$12,278,000	-	\$13,392,000	\$3,387,000	-	\$3,745,000
<b>Total Jobs</b>	170	-	180	50	-	50
<b>Total Earnings</b>	\$4,431,000	-	\$4,833,000	\$1,213,000	-	\$1,343,000

Note: State amounts are included in County amounts.

Annual tax revenues related to on-going operations of the proposed new MLL stadium are estimated to range from \$298,000 to \$321,000 at the County level and \$149,000 to \$167,000 at the State level.

Proposed New MLL Stadium in Prince George's County			
Estimated Incremental Tax Revenues From On-Going Operations			
Municipality/Tax	Range		
<b>Prince George's County</b>			
Admissions & Amusement Tax	\$233,000	-	\$245,000
Local Personal Income Tax	47,000	-	51,000
Hotel Occupancy Tax	18,000	-	25,000
Total	\$298,000	-	\$321,000
<b>State of Maryland</b>			
Sales and Use Tax	\$97,000	-	\$109,000
Personal Income Tax	42,000	-	47,000
Corporate Income Tax	10,000	-	11,000
Total	\$149,000	-	\$167,000
<b>GRAND TOTAL</b>	<b>\$447,000</b>	-	<b>\$488,000</b>

*Multi-Field Sports Complex*

On-going activities at the proposed new multi-field sports complex are estimated to generate between \$17.4 million and \$19.3 million annually in incremental new direct spending to the County of which approximately \$8.9 million to \$9.9 million would be incremental new to the State.

Proposed New Multi-Field Sports Complex in Prince George's County						
Estimated Annual Incremental Economic Benefits From On-Going Operations						
Category	Prince George's County			State of Maryland		
	Range			Range		
<b>Spending</b>						
Direct Spending	\$17,359,000	-	\$19,333,000	\$8,923,000	-	\$9,928,000
Indirect/Induced Spending	\$10,793,000	-	\$12,021,000	\$5,549,000	-	\$6,174,000
Total Spending	\$28,152,000	-	\$31,354,000	\$14,472,000	-	\$16,102,000
<b>Total Jobs</b>						
	320	-	360	170	-	180
<b>Total Earnings</b>	\$10,121,000	-	\$11,271,000	\$5,208,000	-	\$5,796,000

Note: State amounts are included in County amounts.

Annual tax revenues related to on-going operations of the proposed multi-field sports complex are estimated to range from \$437,000 to \$488,000 at the County level and \$790,000 to \$880,000 at the State level.

Proposed New Multi-Field Sports Complex in Prince George's County		
Estimated Incremental Tax Revenues From On-Going Operations		
Municipality/Tax	Range	
<b>Prince George's County</b>		
Hotel Occupancy Tax	\$284,000	- \$315,000
Local Personal Income Tax	108,000	- 120,000
Admissions & Amusements	45,000	- 53,000
Total	<u>\$437,000</u>	<u>- \$488,000</u>
<b>State of Maryland</b>		
Sales and Use Tax	\$565,000	- \$629,000
Personal Income Tax	181,000	- 202,000
Corporate Income Tax	44,000	- 49,000
Total	<u>\$790,000</u>	<u>- \$880,000</u>
<b>GRAND TOTAL</b>	<b>\$1,227,000</b>	<b>- \$1,368,000</b>

Overall Summary

Market research suggests relatively limited demand for the proposed new 22,000-seat MLL stadium which is further supported by the fact that no MLL team currently plays in a lacrosse-specific stadium. Although the Bayhawks are envisioned to serve as the primary tenant, the ability to consistently attract other sports and entertainment activity to this size venue appears challenging. As such, any business model would be very dependent on the long-term success of the MLL team. In addition, although the majority of estimated activity at the proposed new MLL stadium would be incremental new to Prince George's County, it would primarily represent a transfer of existing activity and related economic and fiscal impacts at the State level.

By contrast, there appears to be strong market demand for the proposed multi-field sports complex, particularly given the lack of a comparable complex in the County and the relatively limited date and space availability at other existing venues in Maryland. The proposed multi-field sports complex could serve a variety of demand generators including various levels of competitions/tournaments for multiple sports. As with the proposed MLL stadium, all of this activity would be incremental new to the County while only a portion would be net new to the State. In addition, the type and amount of event activity estimated to occur at the proposed multi-field sports complex would generate significant economic and fiscal benefits to both the County and the State.

A natural question is whether the County should consider constructing a smaller MLL stadium. Although a stadium with a seating capacity of between 12,000 and 14,000 could likely adequately accommodate the Bayhawks for the foreseeable future, the existing supply of facilities in the State and input from potential demand generators suggest that the marketability for other events would still be relatively limited and would not likely justify the construction cost from an economic perspective.

From a long-term planning perspective, the County may want to consider the merits of constructing a smaller, first-class outdoor competitive stadium that would complement the multi-field sports complex. Offering a smaller championship stadium could enhance the complex's marketability and competitiveness for hosting certain competitions/tournaments. Such a facility could offer a relatively limited number of permanent seats that could be augmented by temporary seats on an as-needed basis or expanded in the future based on market demand.

#### Potential Next Steps

A market/economic analysis is an initial step in any planning process. Should the M-NCPPC and State decide to move forward with the project, typical next steps in the development planning process would include refining the program elements and development schedule; refining development cost estimates; identifying an operating strategy including any potential shared resources that may result in cost savings; and approaching potential public and private sector funding partners.

This section summarizes key findings outlined in the report. Because the information presented in the executive summary is extracted from the more detailed analysis, it is important for the reader to review the report in its entirety in order to gain a better understanding of the research, methodology and assumptions used. The remainder of this report summarizes our key findings related to the market and economic analysis.

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## Overview of U.S. Lacrosse

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Understanding the history of U.S. lacrosse and trends at multiple levels provides a frame of reference for assessing potential demand for the proposed new MLL stadium/multi-field sports complex. As such, this section provides an overview of the governing body of lacrosse as well as trends in youth participation and at MLL games.

### US Lacrosse

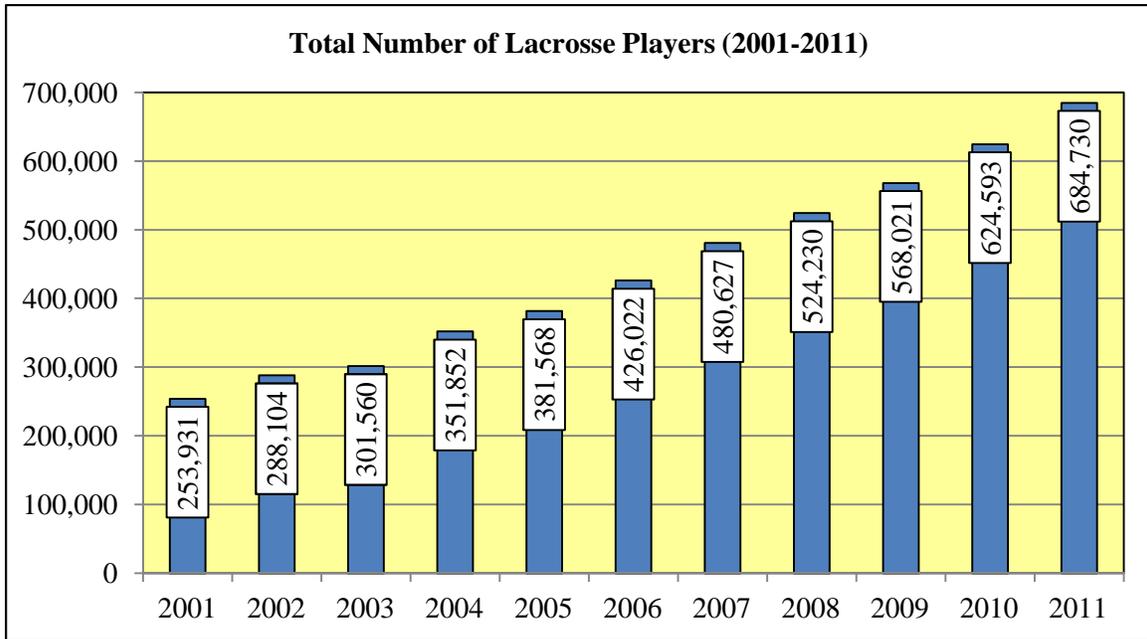
Founded in 1998, US Lacrosse is a 501(c)3 organization that serves as the national governing body of men's, women's, and youth lacrosse. US Lacrosse is the result of a three-year strategic initiative that focused on creating a unified national structure to more effectively support the growth and development of lacrosse. Headquartered in Baltimore, US Lacrosse provides a leadership role and offers programs and services to inspire participation while protecting the integrity of the sport. US Lacrosse also has a network of 64 regional chapters throughout the country that help develop and promote the game at the grassroots level. Membership is comprised of approximately 400,000 lacrosse players, coaches, officials, and others. In 1997, Maryland became home to the Lacrosse Museum and National Hall of Fame.

US Lacrosse works in collaboration with both the National Collegiate Athletic Association (NCAA) and the National Federation of State High School Associations (NFHS) to oversee the game. The NCAA and NFHS activity in lacrosse is almost exclusively focused on rules, with the additional NCAA focus on staging a post-season tournament. US Lacrosse is essentially responsible for everything else related to the development of and service to the sport as its national governing body including the certification and training of coaches and officials, sports science and safety research, and the expansion of the sport nationwide through its New Start Program. The Sports Science & Safety Committee functions as an advisory group to US Lacrosse as well as players and coaches throughout the world. Its goal is to utilize sports medicine and safety knowledge to objectively advise the lacrosse community on factors that may enhance the safety and quality of experience in the sport of lacrosse at all levels.

Although the majority of the funding for US Lacrosse comes from membership dues, US Lacrosse is continually seeking national sponsors to help raise awareness of the sport. In 2011, Champion Activewear, Marriott International, Nationwide, Sports Authority and US Bank were a few of the national premier sponsors that made an investment.

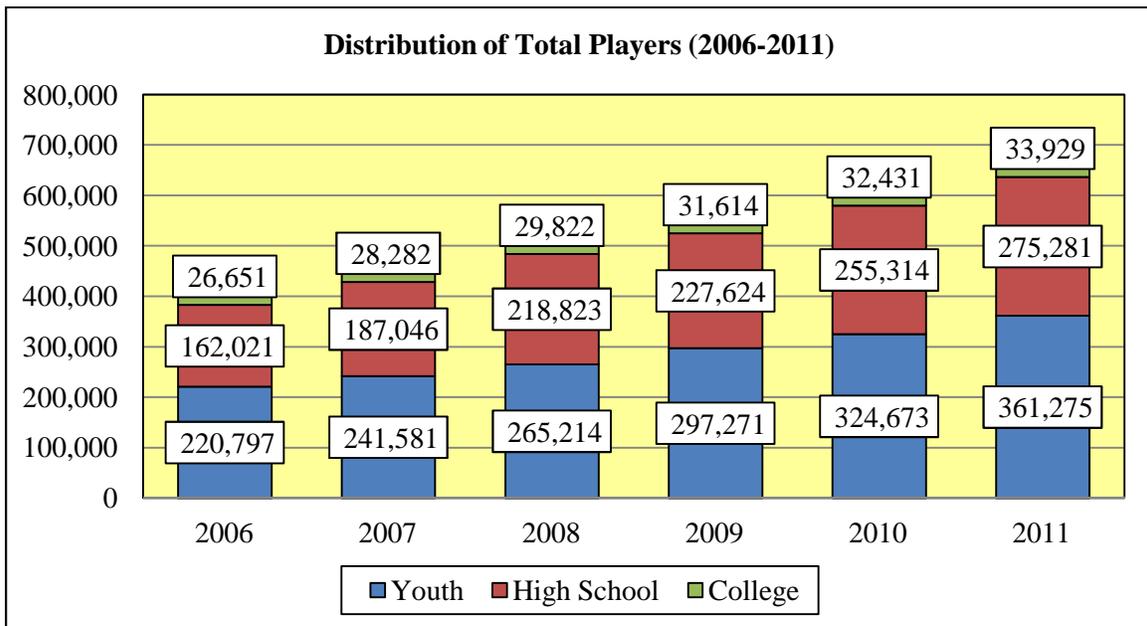
For over a decade, lacrosse has been one of the fastest-growing team sports in the country. US Lacrosse player participation spans youth, high school, collegiate and professional/post-collegiate levels. In 2011, more than 680,000 players participated in lacrosse on organized teams, an increase of more than 60,000 players from the previous year. This was the largest one-year increase recorded since 2001. According data from US Lacrosse, the top five states with the most lacrosse players are Maryland, New York, New Jersey, Massachusetts and Virginia.

The following graph, which includes youth, high school, collegiate and professional/post-collegiate levels, illustrates the sport's continued growth between 2001 and 2011.



Source: US Lacrosse.

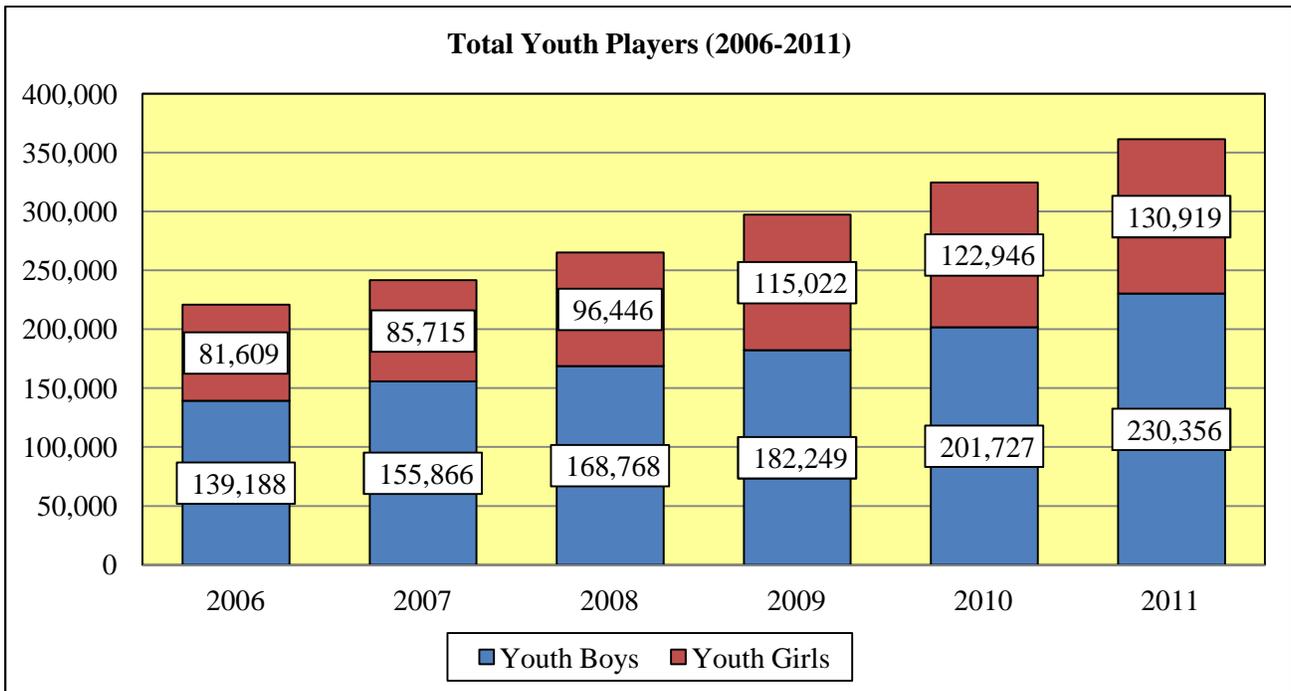
Between 2006 and 2011, the high school level has seen the greatest growth (70%), followed by youth (64%) and collegiate levels (27%).



Note: The above only includes youth, high school and collegiate players as detailed data was not available for professional/post-collegiate levels. As such, the total number of players differs by 14,245 from the previous graph.  
 Source: US Lacrosse.

## Youth Lacrosse

Between 2006 and 2011, approximately 63% of youth players were boys. However, the popularity of the sport among both youth boys and girls is growing at similar rates - 65% and 60%, respectively.



Source: US Lacrosse.

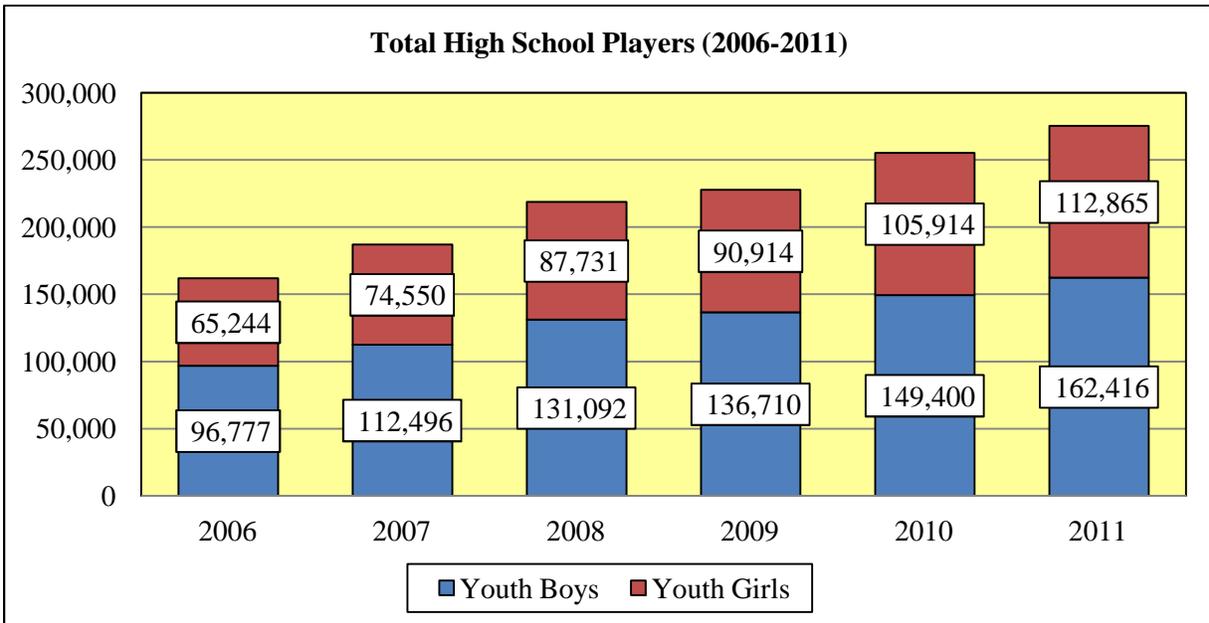
## High School Lacrosse

According to the NFHS, lacrosse has been the fastest growing team sport among NFHS member schools for both boys and girls. Between 2006 and 2011, the number of schools sponsoring lacrosse for boys and girls has increased by 57% and 48%, respectively. Maryland had six boys' and five girls' high school teams named in *Lacrosse Magazine's* 2011 season-ending high school top 25.

NHFS Growth Rates							
Boys' Sports	2006	2011	Growth Rate	Girls' Sports			
				2006	2011	Growth Rate	
Lacrosse	1,395	2,192	57%	Lacrosse	1,349	1,999	48%
Bowling	1,954	2,454	26%	Bowling	1,871	2,436	30%
Volleyball	1,726	2,078	20%	Volleyball	445	578	30%
Water Polo	658	768	17%	Water Polo	2,308	2,598	13%
Swimming	6,224	6,899	11%	Swimming	678	762	12%

Source: US Lacrosse.

Between 2006 and 2011, approximately 60% of high school players were boys. However, player participation among high school girls grew at a faster rate (73%) than that of high school boys (68%) during this same five year period.



Source: US Lacrosse

### Collegiate Lacrosse

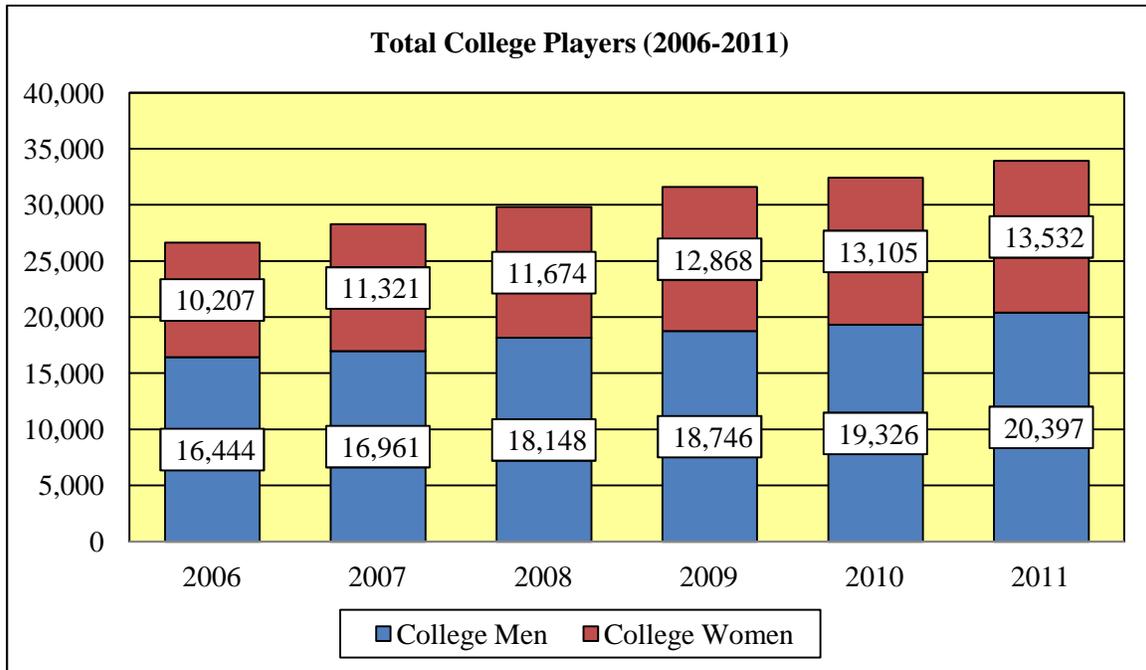
Similar to high school, lacrosse has also been the fastest growing team sport among NCAA institutions for both men and women. Colleges and universities throughout the U.S. are adding both men's and women's varsity programs. As a point of reference, thirty new collegiate varsity programs began play in 2012 and another 48 are set to begin in 2013. The addition of eight new women's Division I programs will result in a total of 100 teams at that level.

Between 2006 and 2011, the number of schools sponsoring lacrosse for men and women has increased by 26% and 32%, respectively.

NCAA Growth Rates							
		Growth				Growth	
Men's Sports	2006	2011	Rate	Women's Sports	2006	2011	Rate
Lacrosse	222	280	26%	Lacrosse	271	357	32%
Volleyball	82	95	16%	Ice Hockey	75	87	16%
Indoor Track	567	616	9%	Golf	504	575	14%
Cross Country	879	952	8%	Indoor Track	630	694	10%
Swimming	381	410	8%	Cross Country	958	1,026	7%

Source: US Lacrosse.

Over the past five years, lacrosse participation among college men and women has increased by 24% and 33%, respectively. In 2011, there were nearly 34,000 collegiate participants of which 60% were men. Participants include varsity, junior college and club players.



Source: US Lacrosse.

In the United States, lacrosse became popular on college campuses in the late 1800s, beginning with New York University in 1877. Maryland schools have had a long tradition in lacrosse. The University of Maryland fielded its first team in 1910. In 1926, the first women's lacrosse team in the country was established at the Bryn Mawr School in Baltimore. Lacrosse made its Olympic debut in 1904, with the Johns Hopkins University team representing the United States at the summer games in 1928 and 1932. That school has remained a lacrosse powerhouse - winning the NCAA Division I Men's Lacrosse championship nine times since 1971, most recently in 2007. Other Maryland college lacrosse teams have also performed well including the University of Maryland-College Park, University of Maryland Baltimore, Towson University, Loyola University and Salisbury University. In 2012, Loyola University Maryland's Greyhounds defeated the University of Maryland-College Park's Terps to win the NCAA Division I Men's Lacrosse championship. In addition, Salisbury University won its second straight Division III title in 2012. The University of Maryland-College Park has also won 10 Division I Women's Lacrosse Championships, most recently in 2010, and Salisbury University won the Division III title in 2010.

Maryland also hosts competitive lacrosse events. The MLL Championship Weekend was held in Annapolis at Navy-Marine Corps Memorial Stadium in 2009, 2010, and 2011. In addition, the NCAA Men's Lacrosse Championship was held at M&T Bank Stadium in Baltimore five of the past ten years including 2010 and 2011. M&T Bank Stadium will host this tournament again in 2014.

The annual NCAA Men's and Women's Lacrosse Championship tournaments determine the top lacrosse team in the NCAA Division I, Division II, and Division III. The following table illustrates total attendance at the NCAA Men's Lacrosse Championship tournament for the last six years. Attendance at the Division I Finals has ranged from 30,800 in 2012 to 49,000 in 2008.

Total Attendance at NCAA Men's Lacrosse Championship Tournament (2007-2012)						
Year	Stadium	Capacity	Location	Champion	Total Attendance	% Change
2007	M&T Bank Stadium	71,008	Baltimore, MD	Johns Hopkins	123,225	
2008	Gillette Stadium	68,756	Foxborough, MA	Syracuse	121,511	-1%
2009	Gillette Stadium	68,756	Foxborough, MA	Syracuse	102,601	-16%
2010	M&T Bank Stadium	71,008	Baltimore, MD	Duke	102,219	0%
2011	M&T Bank Stadium	71,008	Baltimore, MD	Virginia	98,786	-3%
2012	Gillette Stadium	68,756	Foxborough, MA	Loyola	79,595	-19%
<b>Average</b>					<b>104,700</b>	<b>-35%</b>

Note: Total attendance includes Division I Semifinals and Finals as well as Division II and III Finals.

Sources: NCAA; secondary research.

Total attendance at NCAA Men's Lacrosse Championship tournament has been steadily declining. This year's championship weekend at Gillette Stadium drew the smallest crowd (79,595) since the Division I semifinals and final and Division II and III finals were moved to professional stadiums in 2003. The NCAA is currently exploring various options to better showcase this event including moving the Final Four a week after the Semifinals, hosting the event at 40,000 to 50,000-seat venues, and potentially moving back to collegiate facilities.

The annual NCAA Division I Women's Lacrosse Championship tournament is typically held at smaller venues on college campuses. During the profiled period, total attendance increased in 2009 and 2010 (when Maryland won the title at Johnny Unitas Stadium in Towson) but then decreased in 2011 and 2012. Attendance at the Finals has ranged from 6,125 in 2008 to 9,782 in 2010.

Total Attendance at NCAA Women's Lacrosse Championship Tournament (2008-2012)						
Year	Stadium	Capacity	Location	Champion	Total Attendance	% Change
2008	Johnny Unitas Stadium	11,200	Towson, MD	Northwestern	12,425	
2009	Johnny Unitas Stadium	11,200	Towson, MD	Northwestern	14,064	13%
2010	Johnny Unitas Stadium	11,200	Towson, MD	Maryland	18,564	32%
2011	Kenneth P. LaValle Stadium	8,132	Stony Brook, NY	Northwestern	15,469	-17%
2012	Kenneth P. LaValle Stadium	8,132	Stony Brook, NY	Northwestern	14,856	-4%
<b>Average</b>					<b>15,100</b>	<b>20%</b>

Note: Total attendance includes Division I Semifinals and Finals.

Sources: NCAA; secondary research.

### Post-Collegiate Lacrosse

There are several avenues for former high school and collegiate lacrosse players of all ages to continue to play at the post-collegiate level. For men, there are over a dozen adult leagues including the American Lacrosse League which consists of more than 50 teams from Maine to Virginia. For older players, there are Masters, Grandmasters and Supermasters divisions. In addition, there are several tournaments held around the country for all levels of play. There are over 100 organized women's post-collegiate club teams that play in both the local/regional leagues as well as tournaments throughout the year.

## International

In 2008, the Federation of International Lacrosse (FIL) was formed to be the new governing body for men's and women's lacrosse at the international level. The FIL was formed in order to merge the International Federation of Women's Lacrosse Associations (IFWLA) and the International Lacrosse Federation (ILF). The IFWLA previously sponsored the women's world championships and the ILF had sponsored the men's.

In addition to governing all aspects of the U.S. men's and women's national teams, US Lacrosse plays a leading role in supporting men's and women's lacrosse development internationally. World Championships are held every four years through the FIL at the senior and U19 level for both men and women. The U.S. has been dominant on the world stage, winning a total of 24 world championships since 1974.

## **Professional Lacrosse**

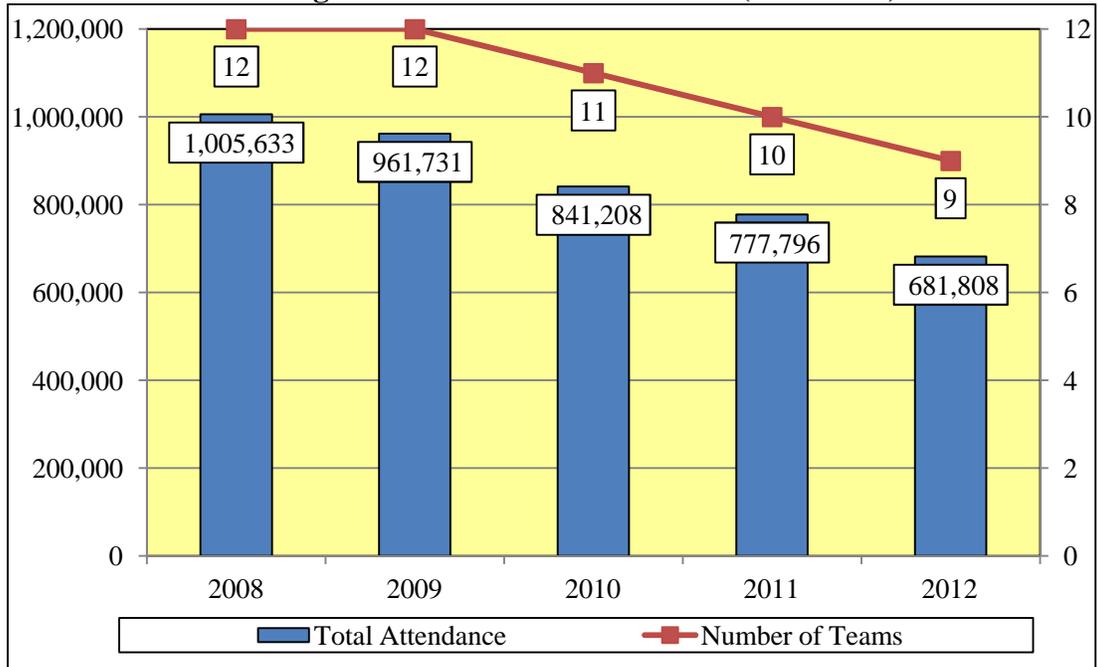
### National Lacrosse League

The NLL is an indoor league that began in 1987 as a spinoff of the Major Indoor Lacrosse League. The NLL features six teams in the U.S. and three teams in Canada that play a 16-game season which runs from January through April and is followed by the playoffs in May.

In 2012, the nine NLL teams consisted of Buffalo, Calgary, Colorado, Edmonton, Minnesota, Philadelphia, Rochester, Toronto and Washington State. The Baltimore Thunder played at 1<sup>st</sup> Mariner Arena from 1987 to 1999 before becoming the Pittsburgh CrosseFire in 2000, the Washington Power in 2001 and the Colorado Mammoth in 2003.

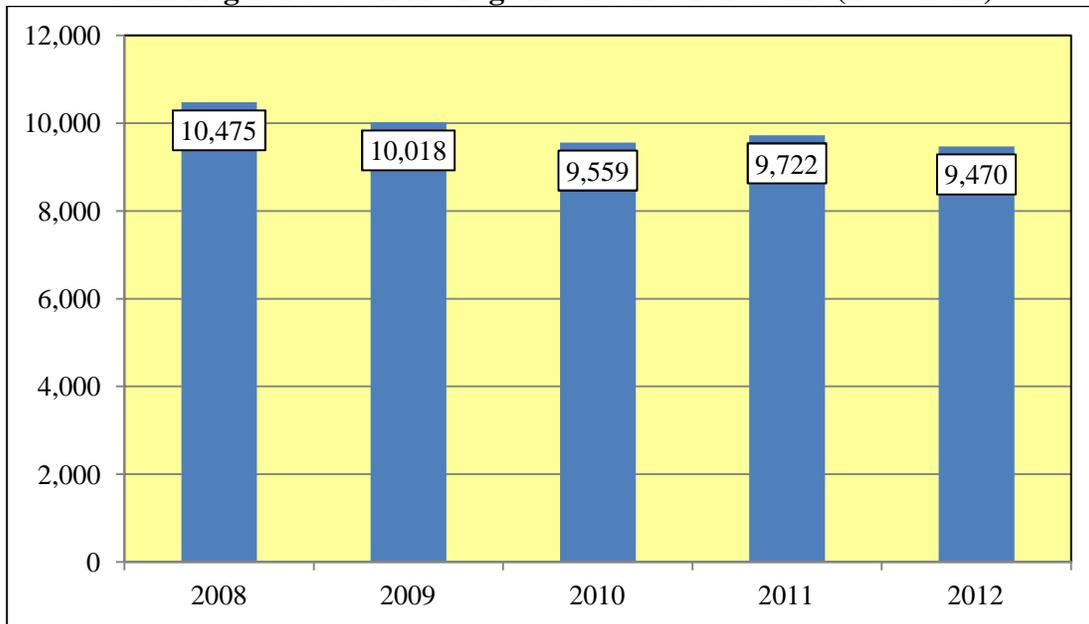
The graphs on the next page illustrate trends in total attendance and attendance per game in the NLL for the last five years. Total attendance has decreased each of the last four years which correlates to the decrease in the number of teams from 12 in 2008 and 2009 to nine (9) in 2012. Average attendance per game, which mitigates the number of teams in a league and the number of games played, has decreased three of the last four years.

**NLL Regular Season Total Attendance (2008-2012)**



Sources: NLL; *Sports Business Daily*.

**NLL Regular Season Average Attendance Per Game (2008-2012)**



Sources: NLL; *Sports Business Daily*.



Major League Lacrosse

MLL is an outdoor professional lacrosse league that began play in 2001 with six teams including the Baltimore Bayhawks, Boston Cannons, Bridgeport Barrage, Long Island Lizards, New Jersey Pride, and Rochester Rattlers. One of MLL’s goals was to capitalize on the growing demand for world-class field lacrosse driven by dramatic growth in the U.S. lacrosse market. Marketed as exciting, affordable, family-friendly entertainment, there are currently eight teams across the U.S. and Canada playing in the MLL.

The Boston Cannons, Long Island Lizards, and Chesapeake Bayhawks (formerly Baltimore and Washington) have been members of the League since its inception in 2001. In 2006, the Denver Outlaws were added as part of the League’s western expansion. The Hamilton Nationals (formerly Toronto) joined MLL in 2009 as the League’s first international team. In 2012, the Charlotte Hounds and Ohio Machine joined the League.

MLL has approximately 230 lacrosse players which are from some of the top academic institutions including Johns Hopkins, Virginia, Princeton, Syracuse, and Duke. The 2012 MLL season consisted of a total of 56 regular season games (eight teams playing seven home games) that ran from April to August. In addition, the League hosts special events such as the MLL Collegiate Draft, MLL All-Star Game, and the MLL Championship Weekend. The MLL Championships were held in Annapolis, Maryland in 2009, 2010, and 2011.

*General Demographics of MLL*

Lacrosse is the fastest growing team sport in the U.S. and generally attracts an upscale demographic.

The adjacent table summarizes the general characteristics of the MLL fan base. The majority of the fans (72%) are male. Nearly one-half (49%) of fans are between the ages of 18-34 with a median age of 31 years old. Approximately 86% of fans have a household income of more than \$115,000. In addition, approximately 86% of MLL fans are college graduates.

<b>General Demographics of MLL</b>	
<b>Category</b>	<b>Fans</b>
<b>Gender</b>	
Male	72%
Female	28%
<b>Age</b>	
17 and Under	37%
18-34 Years Old	49%
35+ Years Old	13%
<b>Median Age</b>	31
<b>Income</b>	
Less than \$115K	14%
\$115K-\$165K	45%
\$165K-\$240K	27%
\$240K +	14%
<b>Education</b>	
College	86%
No College	14%

Source: MLL.



### *Business Operations*

MLL is structured as a single entity in an attempt to avoid some of the financial and competitive pitfalls that traditional franchise Leagues have faced. The single-entity structure enables MLL to control escalating player costs, gain economies of scale, maintain league-wide financial control, and implement league-wide integrated marketing programs. In this structure, team operators maintain 100% of the revenues from ticket sales, local sponsorship, game day merchandise sales (less royalties), concessions, and parking and in turn are responsible for all expenses incurred with operating the team and managing home games. Teams are also responsible for contributing to the total MLL expense of player salaries and worker's compensation coverage. Team operators benefit from decisions made and sponsorships signed at the League level. For example, the League's agreement with ESPN2 has resulted in increased national exposure of the sport and the League, which results in more merchandise and tickets sold at the local level.

In MLL, the players sign contracts directly with the League (instead of with an individual team) and are placed in the League Player Pool for selection by the teams. Teams draft, trade, and waive players according to MLL rules and operate under a salary cap. In 2011, the average MLL player salary was \$9,211 with a League minimum of \$6,000 and a maximum of \$15,000.

### *Broadcast Partners*

ESPN2 was the national television home of Major League Lacrosse from 2003 through 2011. MLL partnered with CBS Sports Network for the 2012 season. CBS Sports Network aired a total of 14 live national games in addition to all 18 episodes of *Inside the MLL*, the league's 30-minute magazine show. CBS Sports Network is available to more than 99 million homes in the U.S. through the leading cable and satellite providers.

### *Corporate Partners*

Sponsorship partners are an important factor in the financial viability of the League. The following lists current MLL corporate partners:

#### Anchor Level Partners

- Bud Light/ Anheuser-Busch
- Coke Zero
- Warrior Lacrosse

#### Official Partners

- Body By Jake Global
- Brine
- Cascade
- EFX
- Ford
- Great Atlantic Lacrosse Company
- New Balance
- POWERADE

Sponsors have provided the MLL with not only cash commitments but items and equipment necessary for play. As a point of reference, the value of these sponsorships was estimated to be nearly \$2.3 million in 2010. The League intends to increase Top-Tier Sponsors in the coming years which would be given exclusive sponsorship of a specific team's jersey. The price of these sponsorships is estimated to average \$400,000 per year.

### *MLL Team History and Future Expansion Plans*

The MLL has experienced many changes in the number of teams since its inception including:

- *Philadelphia Barrage* – joined in 2001 and folded in 2008
- *New Jersey Pride* – joined in 2001 and folded in 2008
- *Los Angeles Riptide* – joined in 2006 and folded in 2008
- *San Francisco Dragons* – joined in 2006 and folded in 2008
- *Toronto Nationals* joined in 2009 and relocated to Hamilton in 2011
- *Chicago Machine* joined in 2006 and folded in 2010 and subsequently relocated to Ohio for the 2012 season

As previously mentioned, the MLL expanded to eight teams in 2012 with the addition of the Ohio Machine and the Charlotte Hounds. The League's expansion initiative has a goal of 16 teams in the next decade. Target markets include Atlanta, Chicago, Dallas, Houston, Indianapolis, Miami, Minneapolis, Nashville, Orlando, Philadelphia, Pittsburgh, Portland, Salt Lake City, San Francisco, Seattle and Southern California. No new teams are currently slated for the 2013 season.

The cost of a new MLL expansion team is \$1.5 million. The MLL does not solicit expansion teams through a bid process. Instead, the MLL has certain criteria for expansion including the strength of the ownership group, market demographics, and the availability of a suitable stadium. The League generally seeks locations and stadiums that will minimize competition with other professional sports team which could potentially negatively impact fan loyalty.

As shown in the following table, the Chesapeake Bayhawks play in the Baltimore Metropolitan Statistical Area (MSA) which ranks third in MSA population and second in median household income among current MLL markets.

Select Market Characteristics - 2012 MLL Teams								
Team	Location	Year Joined	MSA		DMA		Median Household	
			Population	Rank	Population	Rank	Income	Rank
Long Island Lizards	Hempstead, NY	2001	18,919,649	1	7,493,530	1	\$63,263	3
Boston Cannons	Allston, MA	2001	4,559,372	2	2,410,180	2	\$69,784	1
<b>Chesapeake Bayhawks</b>	<b>Annapolis, MD</b>	<b>2001</b>	<b>2,714,546</b>	<b>3</b>	<b>1,093,170</b>	<b>5</b>	<b>\$65,817</b>	<b>2</b>
Denver Outlaws	Denver, CO	2006	2,554,569	4	1,539,380	3	\$59,919	4
Ohio Machine	Delaware, OH	2012	1,840,584	5	904,030	6	\$52,324	5
Charlotte Hounds	Charlotte, NC	2012	1,763,969	6	1,147,910	4	\$52,321	6
Rochester Rattlers	Rochester, NY	2001	1,054,723	7	392,190	7	\$51,424	7
Hamilton Nationals	Hamilton, ONT	2011	742,600	8	n/a		n/a	
<b>Average</b>			<b>4,268,800</b>		<b>2,140,100</b>		<b>\$59,300</b>	
<b>Median</b>			<b>2,198,000</b>		<b>1,148,000</b>		<b>\$60,000</b>	

Notes: Sorted in descending order by MSA market population. n/a denotes not available.

MSA denotes Metropolitan Statistical Area and DMA denotes Designated Market Area which is commonly referred to as the media market.

Sources: U.S. Census Bureau, Statistics Canada, Nielsen Media Research, Inc.

## Stadiums

With the exception of Sports Authority Field at Mile High in Denver which has a capacity of 76,125, MLL stadiums average 18,600 seats.

Overview of MLL Stadiums			
Team	Stadium	Location	Capacity
Denver Outlaws	Sports Authority Field at Mile High	Denver, CO	76,125
Chesapeake Bayhawks	Navy-Marine Corps Memorial Stadium	Annapolis, MD	34,000
Boston Cannons	Harvard Stadium	Allston, MA	30,323
Charlotte Hounds	American Legion Memorial Stadium	Charlotte, NC	24,000
Rochester Rattlers	Sahlen's Stadium	Rochester, NY	13,768
Long Island Lizards	James M. Shuart Stadium	Hempstead, NY	13,000
Ohio Machine	Selby Stadium	Delaware, OH	9,100
Hamilton Nationals	Ron Joyce Stadium	Hamilton, ONT	6,000
<b>Average</b>			<b>25,800</b>
<b>Average Excluding Sports Authority Field</b>			<b>18,600</b>

Source: Individual facilities; secondary research.

MLL games are primarily played in midsize, more intimate stadiums in order to bring the fans closer to the action. MLL believes that the size of the stadium plays a key role in enhancing the ambience and excitement for fans. As such, MLL would like all of its teams to play in venues that are well-suited to the game of lacrosse. Other desired stadium attributes include good sightlines, ample parking, modern audio and video technologies, first-class concessions, and other fan-friendly amenities. MLL considers another benefit of the smaller stadium plan to be cost citing that an MLL team's average stadium rental fee is significantly less than what other professional sports teams pay.

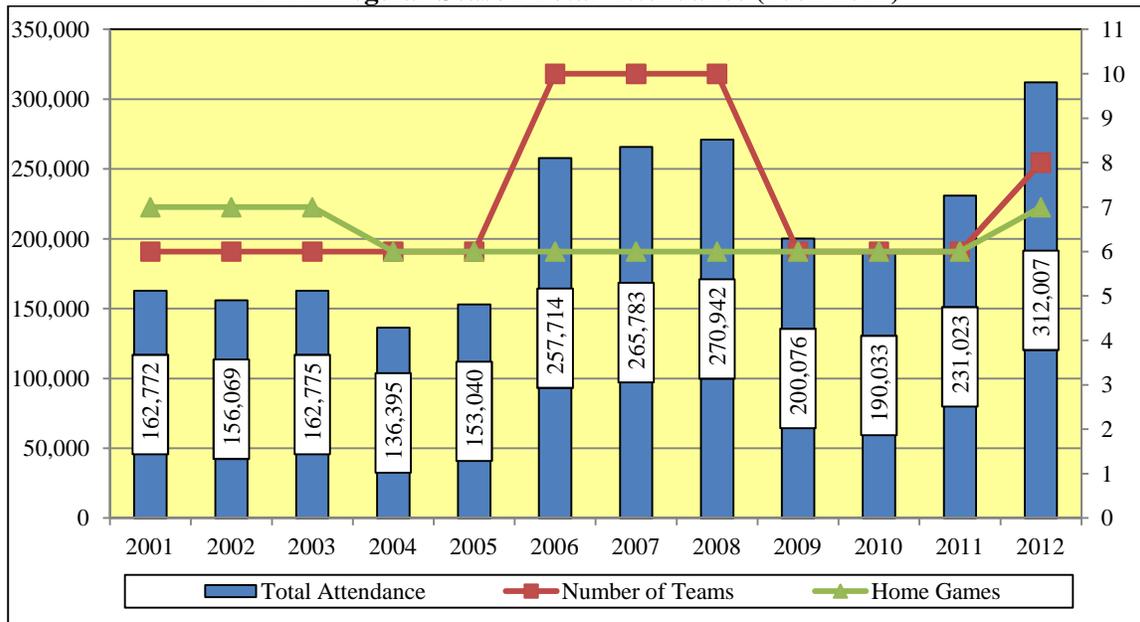
## Historical Attendance

Nearly 2.5 million fans have attended MLL regular season games since its inception in 2001. Between 2001 and 2012, MLL regular season total attendance has ranged from 136,395 in 2004 to 312,007 in 2012.

Total attendance is dependent on a variety of factors including, but not limited to, the number of teams in the league, the number of games played each season, and notable players. MLL consisted of six teams between 2001 and 2005 before increasing to 10 teams for the 2006, 2007, and 2008 seasons and then contracting back to six teams in 2009, 2010 and 2011. MLL played seven home games for its first three seasons before decreasing to six home games from 2004 until 2011. As noted previously, the 2012 regular season consisted of eight teams that each played seven home games.

MLL regular season total attendance increased by 68% in 2006, which was primarily attributable to the addition of four new teams. MLL then experienced a 26% decrease in total attendance with the contraction to six teams in 2009. MLL realized a 22% increase in total attendance in 2011 which was primarily driven by a new team in Rochester which drew total attendance of 25,842 as well as a significant increase in total attendance by the Chesapeake Bayhawks (48,968 in 2011 vs. 26,474 in 2010). In 2012, MLL total attendance increased by 35% with the addition of two teams and increase in the number of home games.

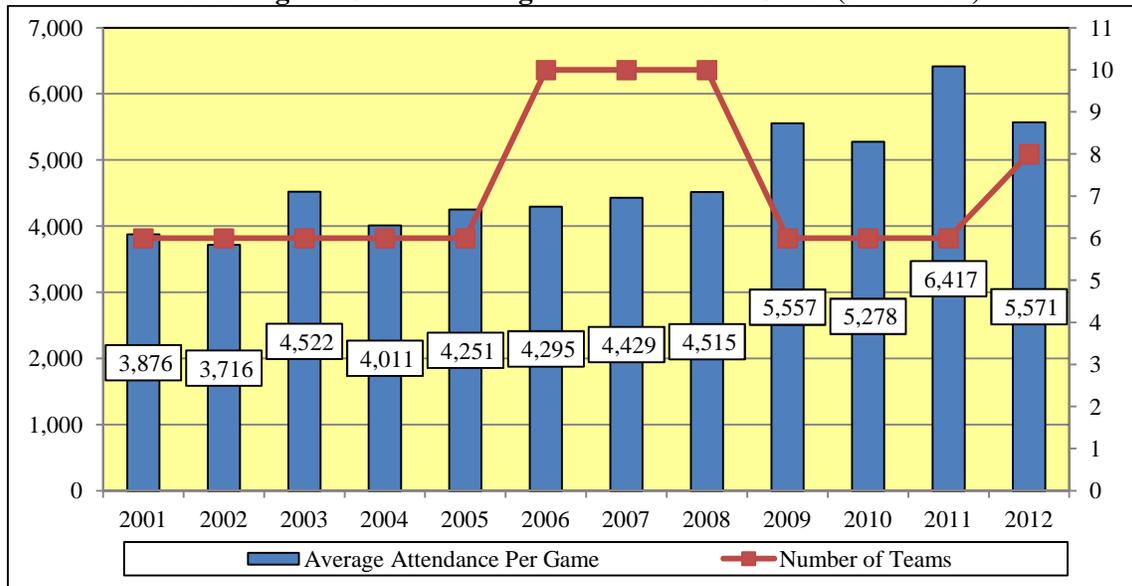
**MLL Regular Season Total Attendance (2001-2012)**



Source: MLL.

MLL regular season average attendance per game has ranged from a low of 3,716 in 2002 to a high of 6,417 in 2011. When the Denver Outlaws joined MLL in 2006, the team averaged more than 11,600 per game. Despite this significant boost, MLL average attendance per game only experienced a minimal increase between 2005 and 2006. MLL realized the largest increase in average attendance per game (22%) in 2003, 2009 and 2011. Average attendance per game decreased by 13% in 2012.

**MLL Regular Season Average Attendance Per Game (2001-2012)**



Source: MLL.

## Summary

Lacrosse has been one of the fastest growing sports in the U.S. The total number of lacrosse players, including youth, high school, collegiate, and professional/post-collegiate participants, has increased by 170% since 2001.

Despite its popularity at the participation level, total attendance at the NCAA Men's Lacrosse Championship Tournament (which includes Division I, II, and III) has been declining since 2007 which the NCAA plans to address in the near future through changes in the tournament schedule/dates and/or venue type and size. Total attendance at the NCAA Women's Division I Lacrosse Championship Tournament (including the Semifinals and Final) has averaged 15,100 over the last five years.

Relative to professional lacrosse, total attendance for the indoor NLL has steadily declined between 2008 and 2012 which is directly related to the corresponding decrease in the number of teams. During that same five-year period, average attendance per game has fluctuated between 9,470 in 2012 and 10,475 in 2008.

MLL research indicates that its fans are primarily males between the ages of 18 and 34 years old who are college educated and have an average household income of more than \$115,000. MLL is structured as a single entity in order to better control escalating player costs, gain economies of scale, maintain league-side financial control and implement league-wide integrated marketing programs. This structure is similar to that used by Major League Soccer (MLS).

Since its inception, MLL has fluctuated in both the number of teams and the number of home games played. Only four teams have been in existence since 2001 including the Bayhawks who have moved locations three times during that 12 year period. MLL teams in Philadelphia, Piscataway (NJ), Los Angeles and San Francisco all folded after the 2008 season – all of which rank among the 11 largest markets in the country. Two other teams relocated to different markets. As mentioned, MLL added teams in Charlotte, North Carolina and Delaware, Ohio for a total of eight in 2012. MLL's goal is to expand to 16 teams in the next decade.

Because total attendance is directly impacted by both the number of teams and the number of games played in any given season, average attendance per game provides a solid measure of team performance. From a macro level, average attendance per game for MLL has increased from approximately 3,900 in 2001 to 5,600 in 2012. Between 2011 and 2012, average attendance per game for MLL decreased by 13% from 6,400 to 5,600. Under the current ownership, the Bayhawks have increased their average attendance per game from 4,400 in 2010 to 9,500 in 2012.

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## Market Analysis

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### Market Overview

It is important to understand the market in which the proposed new MLL stadium and multi-field sports complex would operate. As such, this section of the report profiles select market characteristics including demographic/economic data, area employment, accessibility, hotel supply, area attractions, climate and the existing supply of competitive facilities.

#### Demographic/Economic Data

Demographic and economic indicators are pertinent to estimating potential demand for several reasons. As previously mentioned, the MLL Bayhawks are anticipated to be the primary sports tenant at the proposed new stadium. Other potential event activity at the proposed new stadium and multi-field sports complex includes various other levels of professional, amateur and youth soccer events/tournaments as well as other sports and entertainment events concerts/festivals and community events.

Depending on the scope (e.g., local, State, regional, national) and nature of the event (e.g., recreational league play, instructional lessons, competitive tournaments), these facilities are anticipated to draw both area residents and out-of-town attendees.

MLL and the Bayhawks have conducted market research on the demographic composition of their fan base. As such, it is helpful to understand how the market area relates to these specific characteristics. In addition, event promoters/producers for certain events focus on population, age, ethnicity and income characteristics when selecting markets to host their events while others place more emphasis on accessibility, the type and quality of facilities provided, and surrounding infrastructure (e.g., hotels, restaurants, attractions, retail, etc.). Typically all event promoters/producers consider the cost to utilize the facility as an important factor in their decision-making.

#### *Population*

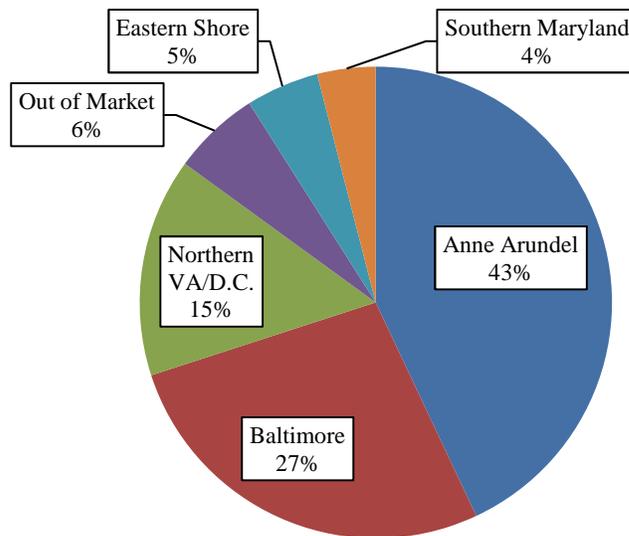
Population serves as a base from which events at the proposed new MLL stadium and multi-field sports complex can draw attendance and other forms of support. While many local, civic based events tend to attract attendees from a relatively close proximity (e.g., Prince George's County), larger sports and entertainment events typically draw attendance from a broader market area (e.g., Baltimore and Washington metro areas). Certain events that may be regional, national and international in scope can draw participants and spectators from an even larger market area.

The Office of Management and Budget (OMB) defines a Core Based Statistical Area (CBSA) as a geographic region that is defined by a significant population center plus its surrounding communities that exhibits a high degree of social and economic assimilation with that center. Metropolitan CBSAs have an urban core of at least 50,000.

Prince George’s County is located in the Washington-Arlington-Alexandria, DC-VA-MD-WV CBSA (Washington Metro area) which also includes Calvert, Charles, Frederick, and Montgomery counties in Maryland; the District of Columbia; Arlington, Clarke, Fairfax, Fauquier, Loudoun, Prince William, Spotsylvania, Stafford and Warren counties and Alexandria City, Fairfax City, Falls Church City, Fredericksburg City, Manassas City, Manassas Park City in Virginia; as well as Jefferson County in West Virginia. Prince George’s County also borders Anne Arundel and Howard counties that are part of the Baltimore-Towson CBSA (Baltimore Metro area) along with Baltimore City and Baltimore, Carroll, Harford, and Queen Anne’s counties.

As shown below, approximately 43% of Bayhawks season ticket holders live in Anne Arundel County followed by 27% in Baltimore and 15% in Northern Virginia/Washington, D.C.

**Bayhawks 2011/2012 Season Ticket Holder Demographics**

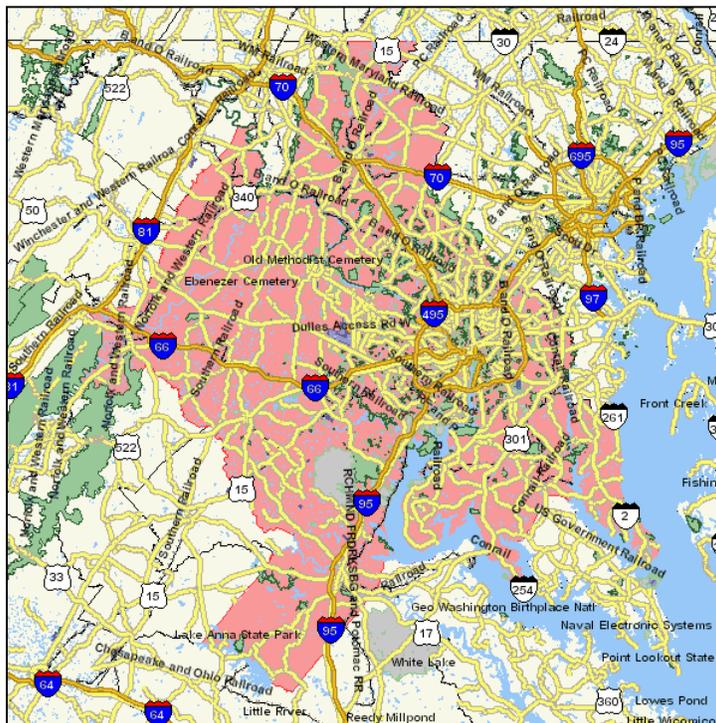


Source: Chesapeake Bayhawks.

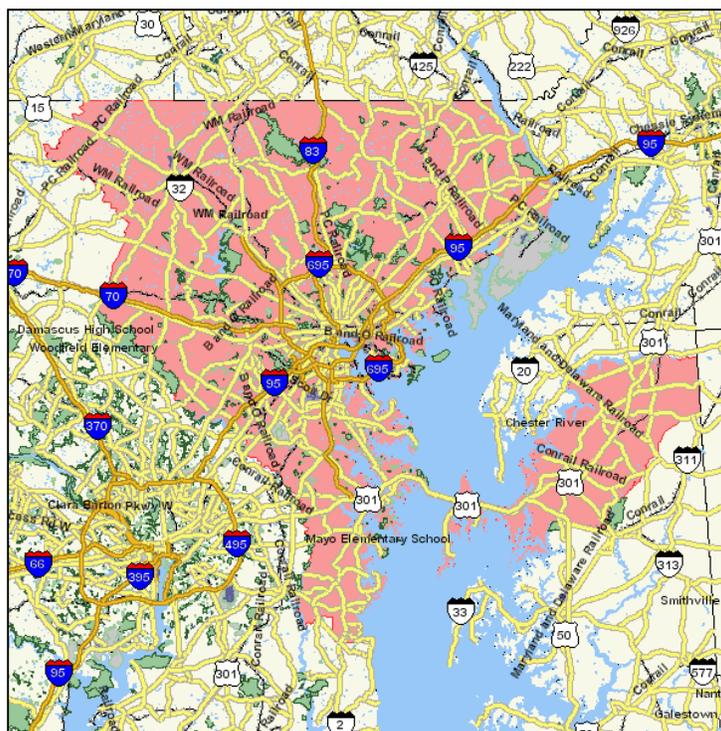
Given the popularity of lacrosse in the region and the fact that the Bayhawks have played their home games in Baltimore, Washington, D.C., Fairfax, and now Annapolis, the team has created a diverse geographic fan base.

Based on the geographic location of Prince George’s County and the fan demographic of the Bayhawks, this section of the report profiles select market characteristics for both the Washington and Baltimore Metro areas which are graphically depicted on the next page.

### Washington Metro area



### Baltimore Metro area



As shown in the table below, there are more than 8.4 million people in the Baltimore and Washington Metro areas combined. Population in Prince George’s County is projected to increase by a total of 2.4% over the next five years compared to 2.0% in the Baltimore Metro area and 6.1% in the Washington Metro area.

<b>Trends in Population</b>			
<b>Data</b>	<b>Prince George's County</b>	<b>Baltimore Metro Area</b>	<b>Washington Metro Area</b>
2000 Census	801,515	2,552,994	4,796,183
2012 Estimate	870,792	2,729,307	5,708,580
2017 Projection	891,553	2,783,196	6,058,276
Growth 2000-2012	8.6%	6.9%	19.0%
Growth 2012-2017	2.4%	2.0%	6.1%
Average Annual Growth 2000-2012	0.7%	0.6%	1.6%
Average Annual Growth 2012-2017	0.5%	0.4%	1.2%

Source: Claritas.

### *Age Distribution*

Analysis by age group is helpful since certain events at stadiums/multi-field sports complexes are targeted towards consumers who fall within specific age categories. As shown in the following table, the age distribution for the estimated 2012 population figures is relatively consistent among the three profiled geographic areas. MLL and competitive youth/amateur sporting competitions/tournaments typically target and appeal to a relatively young demographic. Approximately 25% of the population in each of the profiled areas is under the age of 18 years old and between the ages of 18 and 34 years old.

<b>2012 Estimated Population by Age</b>						
<b>Age Category</b>	<b>Prince George's County</b>		<b>Baltimore Metro Area</b>		<b>Washington Metro Area</b>	
	<b>Number</b>	<b>%</b>	<b>Number</b>	<b>%</b>	<b>Number</b>	<b>%</b>
Under 10 Years Old	121,439	13.9%	350,378	12.8%	801,160	14.0%
10 - 14 Years Old	56,694	6.5%	171,778	6.3%	374,052	6.6%
15 - 17 Years Old	40,351	4.6%	120,395	4.4%	245,633	4.3%
18 - 34 Years Old	212,866	24.4%	629,985	23.1%	1,306,568	22.9%
35 - 54 Years Old	260,410	29.9%	797,748	29.2%	1,767,375	31.0%
55+ Years Old	179,032	20.6%	659,023	24.1%	1,213,792	21.3%
2012 Estimated Median Age	35.3		37.5		36.4	

Source: Claritas.

### Income

Income offers a broad measurement of spending potential for a specific population because it indicates the general ability of individuals or households to purchase a variety of goods and services including participation in, travel to, and admission to sports, cultural and entertainment events.

As shown in the table below, the estimated 2012 median household income for the Washington Metro area (\$80,930) is higher than both Prince George’s County (\$67,886) and the Baltimore Metro area (\$63,433). Approximately 38% of households in the Washington Metro area have household income levels of at least \$100,000 compared to 28% in both Prince George’s County and the Baltimore Metro area.

2012 Estimated Households by Household Income						
Income Category	Prince George's County		Baltimore Metro Area		Washington Metro Area	
	Number	%	Number	%	Number	%
Less than \$25,000	37,413	12.2%	184,977	17.7%	234,023	11.0%
\$25,000 to \$34,999	24,748	8.1%	90,732	8.7%	130,687	6.2%
\$35,000 to \$49,999	44,000	14.4%	138,623	13.3%	235,111	11.1%
\$50,000 to \$74,999	65,787	21.5%	202,145	19.3%	383,943	18.1%
\$75,000 to \$99,999	49,895	16.3%	151,367	14.5%	331,736	15.6%
\$100,000 to \$149,999	57,681	18.8%	168,795	16.1%	429,522	20.2%
\$150,000 or more	26,932	8.8%	109,254	10.4%	379,880	17.9%
2012 Estimated Median Household Income	\$67,886		\$63,433		\$80,930	
2012 Estimated Average Household Income	\$81,024		\$81,311		\$103,768	
2012 Estimated Per Capita Income	\$28,965		\$31,937		\$39,197	

Source: Claritas.

### Ethnicity

As shown in the table that follows, approximately 59% of the population in the Baltimore Metro area and 47% in the Washington Metro area is White which is a strong demographic for lacrosse. Approximately 64% of the population in Prince George’s County is Black/African American compared to nearly 29% in the Baltimore Metro area and 25% in the Washington Metro area. In addition, approximately 16% of the population in Prince George’s County is Hispanic.

2012 Estimated Population by Single Race Classification						
Race	Prince George's County		Baltimore Metro Area		Washington Metro Area	
	Number	%	Number	%	Number	%
White	116,356	13.4%	1,607,103	58.9%	2,701,757	47.3%
Black/African American	555,046	63.7%	781,597	28.6%	1,435,715	25.2%
Hispanic or Latino	141,421	16.2%	136,236	5.0%	835,870	14.6%
Asian	35,396	4.1%	131,552	4.8%	550,205	9.6%
Multiple Races	17,876	2.1%	60,202	2.2%	153,152	2.7%
Other Race	2,242	0.3%	4,573	0.2%	16,237	0.3%
American Indian and Alaska Native	2,124	0.2%	6,822	0.2%	12,326	0.2%
Native Hawaiian and Other Pacific Islander	331	0.0%	1,222	0.0%	3,318	0.1%
<b>Total</b>	<b>870,792</b>	<b>100.0%</b>	<b>2,729,307</b>	<b>99.9%</b>	<b>5,708,580</b>	<b>100.0%</b>

Source: Claritas.

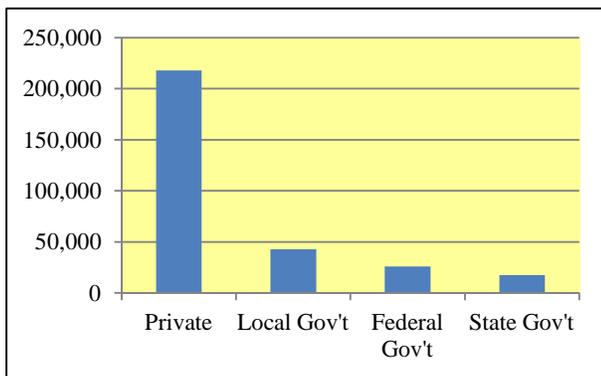
Sports organizations throughout the country continue to place strong emphasis on incorporating diversity and inclusion at all levels in order to increase exposure, market reach and participation. Expanding efforts to establish greater socio-economic, racial and geographic participant diversity is a strategic objective of US Lacrosse which has created various programs to introduce and expand the sport of lacrosse in nontraditional and underserved communities.

### Area Employment Base

A broad workforce distribution helps lessen a community’s dependency on support from any one single industry segment. Industry diversification also helps a local economy withstand economic downturns due to dependency upon one industry; should one industry fail, there are others upon which the local economy can rely.

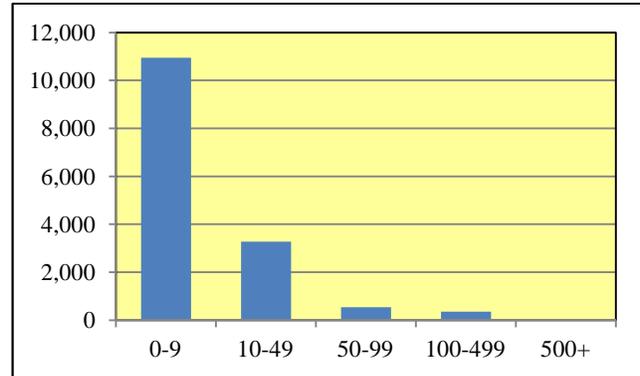
Approximately 15,800 businesses in the County employ nearly 304,000 workers. More than 70% of employment in the County is generated by the private sector, more specifically by trade, transportation and utilities as well as professional and business services industries. The vast majority of businesses have less than 50 employees.

**Distribution of Employment by Industry**



Source: Maryland Department of Business & Economic Development.

**Distribution of Employment by Size**



Source: Maryland Department of Business & Economic Development.

The U.S. Bureau of Labor Statistics (BLS) reported that the unemployment rate for Prince George’s County was 7.2% in June 2012 which was consistent with the State of Maryland (7.2%) and lower than the Baltimore Metro area (7.8%) and the U.S. (8.4%). The unemployment rate was 5.7% in the Washington Metro area.

As shown in the following table, major employers in Prince George’s County include the University System of Maryland, Joint Base Andrews Naval Air Facility Washington, U.S. Internal Revenue Service, U.S. Census Bureau, United Parcel Service (UPS), Giant Food, NASA – Goddard Space Flight Center, Verizon, Prince George’s Community College, Dimensions Healthcare Systems and Gaylord National Resort and Convention Center.

<b>Major Employers in Prince George's County (December 2011)</b>	
<b>Employer</b>	<b>Employees</b>
University System of Maryland	16,938
Joint Base Andrews Naval Air Facility Washington	8,057
U.S. Internal Revenue Service	5,539
U.S. Census Bureau	4,414
United Parcel Service (UPS)	4,220
Giant Food	3,600
NASA - Goddard Space Flight Center	3,171
Verizon	2,738
Prince George's Community College	2,676
Dimensions Healthcare System	2,500
Gaylord National Resort and Convention Center	2,000
Shoppers Food Warehouse	1,975
U.S. Department of Agriculture	1,850
National Maritime Intelligence Center	1,724
Safeway	1,605

Notes: Sorted in descending order by total jobs.

Includes employers with at least 1,500 employees.

Source: Maryland Department of Business and Economic Development.

This local business environment is further augmented by the presence of major employers throughout the Baltimore-Washington Metro area.

Significant financial investments have and are continuing to be made in the County. The Brickyard Station Business Park, Woodmore Towne Centre and National Harbor are recent mixed-used developments. Other planned development initiatives in the County include, but are not limited to: Karington, Konterra Town Center East, Westphalia Mixed-Use Project, M Square: University of Maryland Research Park and the New Carrollton Metro Station Redevelopment.

### Accessibility

Accessibility, particularly via highway, is typically an important factor to the overall success of sports complexes, particularly in suburban settings. In addition, the location and accessibility of a facility relative to the population base can impact its marketability for certain types of events.

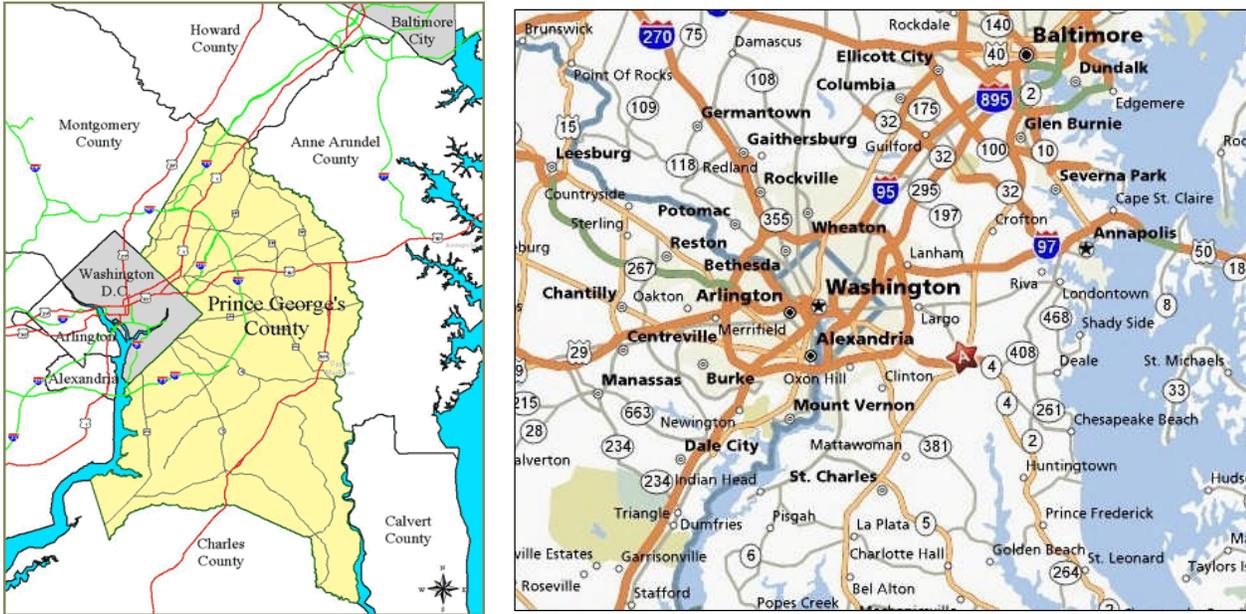
### *Highway*

Prince George's County wraps around the eastern boundary of Washington, D.C. and is accessible to the greater metropolitan area via the following major roadways:

- Interstate 95/495 (Capital Beltway)
- US Route 50 (John Hanson Highway)
- US 1 (Baltimore Avenue)
- Route 295 (Baltimore/Washington Parkway)
- US Route 301 (Crain Highway)

As shown in the maps below, Prince George’s County is located along the I-95 corridor and has excellent accessibility to other State and regional locations. Prince George’s County is proximate to Baltimore and Washington, D.C. and within 200 miles of New York, Philadelphia, and Richmond.

### Area Maps Showing Highway Accessibility



### Air

Air access can be a consideration for attracting certain regional and national events to the proposed stadium/multi-field sports complex. Three major airports are within 50 miles of Prince George’s County. There are also several regional/commuter airports nearby.

The Federal Aviation Administration (FAA) defines enplanements as domestic, territorial and international passengers who board an aircraft in scheduled and non-scheduled service of aircraft. As shown in the following table, the number of passenger enplanements at BWI has increased each of the last three years.

Passenger Enplanements at Area Airports						
Airport	Reagan Washington National Airport		Baltimore Washington International Airport		Washington Dulles International Airport	
Year	Number	% Change	Number	% Change	Number	% Change
2007	9,038,100		10,487,800		11,789,441	
2008	8,704,500	-3.7%	10,215,200	-2.6%	11,348,775	-3.7%
2009	8,490,300	-2.5%	10,339,000	1.2%	11,132,098	-1.9%
2010	8,736,800	2.9%	10,848,600	4.9%	11,276,481	1.3%
2011	9,053,000	3.6%	11,067,300	2.0%	11,043,800	-2.1%
<b>Average</b>	<b>8,805,000</b>		<b>10,592,000</b>		<b>11,318,000</b>	
<b>5-Year Change</b>	<b>0.2%</b>		<b>5.5%</b>		<b>-6.3%</b>	

Source: Federal Aviation Administration.

## Hotel Supply

The diversity and supply of available hotel rooms proximate to the proposed new stadium and multi-field sports complex can be an important factor in attracting certain events, accommodating participants and spectators, generating room nights, and increasing hotel/motel tax collections.

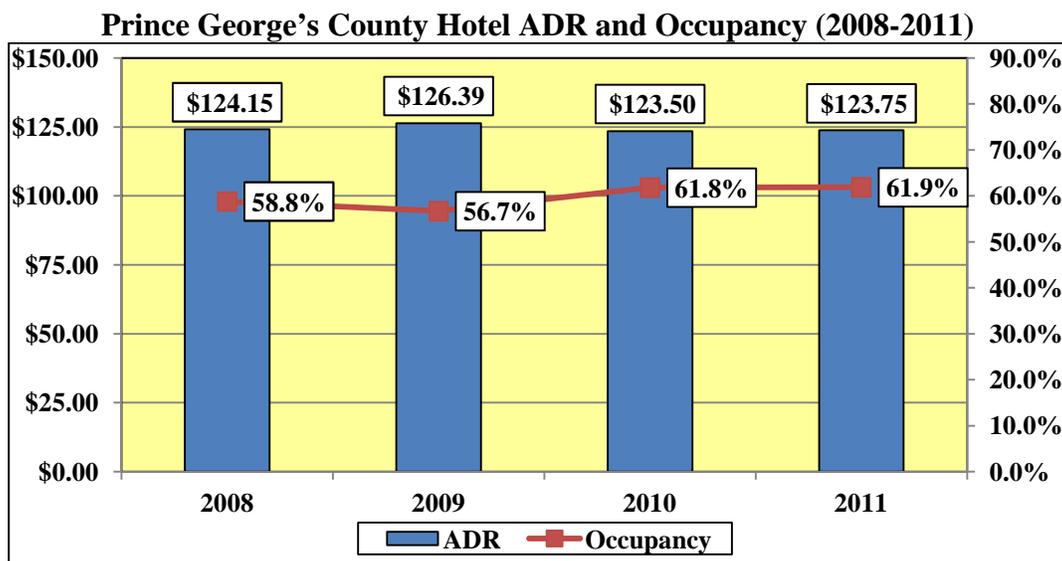
According to the Prince George's County Convention and Visitor's Bureau, there are more than 10,200 hotel rooms in approximately 80 properties in the County. With nearly 2,000 hotel rooms, the Gaylord National Resort and Convention Center accounts for nearly 20% of the total room inventory.

Prince George's County Hotel Supply	
Property	Guest Rooms
Gaylord National Resort and Convention Center	1,996
Marriott Greenbelt	284
Marriott CC University of Maryland Hotel	237
Holiday Inn Washington College Park	220
Sheraton Washington North	207
Holiday Inn Laurel West	207
Holiday Inn Washington DC Greenbelt	206
Metro Points Hotel	197
Westin Washington National Harbor	195
The Colony South	195
Clarion Oxon Hill	194
aloft Hotel Washington National Harbor	190
Comfort Inn Hotel and Conference Center	186
Radisson Hotel Largo Washington DC	184
Comfort Inn Capitol Heights	181
Quality Inn & Suites College Park	169
Comfort Inn Beltsville	169
Best Western Beltway	169
Residence Inn National Harbor	162

Note: Includes hotels with more than 160 rooms.

Source: Prince George's County CVB.

The graph below summarizes the average daily rate (ADR) and occupancy for hotels in Prince George's County from 2008 to 2011, the latest year for which yearly statistics are available. As shown, the County's ADR remained relatively stable between 2008 and 2011. Occupancy experienced a five point increase between 2009 and 2010 which it maintained in 2011.



Sources: Smith Travel Report; Prince George's CVB.

### Area Attractions

When attendees are not at event-related functions, the available cultural and entertainment options are another factor event producers consider when selecting a destination for their event. In addition, event attendees consider attractions when deciding whether to bring the family and/or friends along to their event as well as in determining their length of stay.

Prince George's County is home to several attractions including the NASA/Goddard Space Flight Center, Six Flags America, the National Wildlife Visitor Center, and National Harbor which offers 70 shops and restaurants right on the Potomac River. The County is home to multiple sports teams at all levels of competition as well as the Clarice Smith Performing Arts Center. The County's proximity and accessibility to the nation's capital and its variety of historical, cultural and sports/entertainment options also make it a popular destination for leisure travelers.

### Tourism

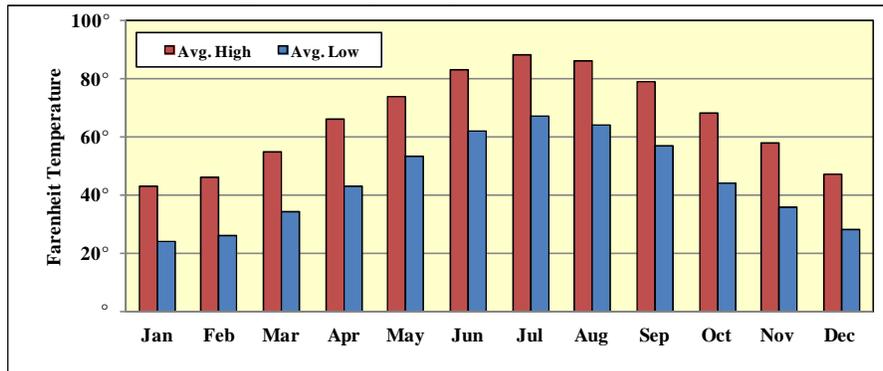
Tourism can represent a significant economic generator for an economy. Attracting spending on items such as lodging, retail, eating/drinking and entertainment/recreational establishments from visitors can supplement local resident spending at area businesses and increase tax revenues for both local and State governments generated by out-of-town visitors. Development of the proposed new MLL stadium/multi-field sports complex could serve to enhance economic impact to the State by attracting new visitor streams and capturing additional spending from existing visitors.

Based on data from the Maryland Office of Tourism Development, there were approximately 16.1 million overnight trips and just over 16.1 million day trips totaling more than 32.2 million person-trips to the State in 2010. This represents a 10.7% increase from 2009 compared to a 9.8% increase for the U.S. The Capital Region, which includes Prince George's, Frederick and Montgomery Counties, ranked third as a destination in the State attracting approximately 5.12 million person trips. The average travel party size of visitors to the State was 2.1 with length of stay averaging 1.3 nights. Approximately 79% of visitors to the State traveled for pleasure compared to 21% for business. In aggregate, visitors spent \$13.7 billion in Maryland in 2009.

### Climate

Climate can play a factor in the marketability of outdoor venues including stadiums and multi-field sports complexes. As shown in the following graph, weather in Prince George's County is relatively moderate approximately nine months of the year which makes it attractive for outdoor events. In addition, offering fields with an artificial turf surface will mitigate potential bad weather and increase the facility's overall marketability.

**Average Monthly Temperature in Fahrenheit**



Source: rssWeather.com.

### Area Outdoor Sports Facilities

The supply of existing and planned facilities in the area and the extent to which they meet the needs of target market segments are important considerations when evaluating potential demand opportunities for any new facility. Facility size, program elements and supporting infrastructure, geographic location, configuration, age, market focus and date availability are factors that impact how competitive area facilities may be to the proposed new MLL stadium/multi-field sports complex in Prince George’s County.

### Area Sports Stadiums

There are several stadiums located in or proximate to Prince George’s County that offer a seating capacity of between 5,000 and 35,000. From strictly a supply perspective, there is a gap in stadium size between Johnny Unitas Stadium (6,000) and the Navy-Marine Corps Memorial Stadium (34,000). Most of the profiled stadiums are utilized by collegiate or professional sports programs, which typically limits scheduling and date availability for other external users. In addition, only the Maryland Soccer Plex offers a critical mass of fields (24) that could adequately accommodate large competitive sports tournaments at one location.

Area Outdoor Sports Stadiums			
Stadium	Location	Capacity	Primary User(s)
Navy-Marine Corps Memorial Stadium	Annapolis	34,000	U.S. Naval Academy; Bayhawks
Johnny Unitas Stadium	Towson	11,000	Towson University
Prince George’s Stadium	Bowie	10,000	Bowie Baysox
Hughes Stadium	Baltimore	10,000	Morgan State University
Homewood Field	Baltimore	8,500	Johns Hopkins University
Regency Furniture Stadium	Waldorf	8,000	Southern Maryland Blue Crabs
Ludwig Field	College Park	6,500	University of Maryland
Maryland Soccer Plex	Germantown	3,200	Various Events/Tournaments
Bulldog Stadium	Bowie	6,000	Bowie State University
Ridley Athletic Complex	Baltimore	6,000	Loyola University
Marvin F. Wilson Stadium	Landover	5,500	Various Events/Tournaments

Notes: Sorted in descending order by capacity.

List includes area stadiums that offer a capacity of between 5,000 and 35,000.

Sources: Management at individual facilities; other secondary research.

The greater Maryland/Washington area is also home to several larger stadiums including FedEx Field, M&T Bank Stadium, Capital One Field at Byrd Stadium, Oriole Park at Camden Yards, RFK Stadium, and Nationals Park that are used by professional and collegiate sports teams as well as other sports and entertainment events. In addition, the Merriweather Post Pavilion in Columbia and the Jiffy Lube Live in Bristow, Virginia offer a total seating capacity of approximately 25,000 and 19,000, respectively, through a combination of fixed seats and lawn areas.

### Local Fields/Sports Complexes

The M-NCPPC, City of Bowie, and the Board of Education all own local playing fields. The City of Bowie has an established allocation process to prioritize the booking process and volume. Weight is placed on those groups that are non-profit, youth-focused and are residents of the City of Bowie. M-NCPPC has a booking allocation process that prioritizes non-profit groups that are based in Prince George's and Montgomery County. The City of Bowie books Mitchellville, which is owned by the Board of Education. The City has a lease on the fields and handles the scheduling/permitting of M-NCPPC fields that are not regional parks and are located in Bowie.

According to M-NCPPC representatives, there are 23 lighted and 68 unlighted fields available for soccer/football usage in Prince George's County. Although not all of these fields are regulation sized, they are able to host field sports at some level. The majority of fields are located at neighborhood or community parks. Only 13 facilities offer two fields – the remainder are stand-alone fields. The City of Bowie currently has one artificial surface field and is expected to complete construction on a second artificial surface field in 2013.

As stated earlier, Phase 1 of the Green Branch Athletic Complex regional park is anticipated to include three irrigated softball fields with bleacher seating, three irrigated combination soccer/football fields with bleacher seating; a non-irrigated informal field area that can accommodate two youth size soccer fields; a central concession/restroom pavilion; 495 parking spaces and other recreational amenities. None of the fields will be lighted initially although the required infrastructure to do so later will be in place.

The City of Bowie manages eight parks that offer a total of 22 multi-purpose fields including Allen Pond Park; Buckingham Park; Church Road Park; Glen Allen Park; Kenhill Center; Mitchellville; Popes Creek; and Whitmarsh Park. Mitchellville offers the largest density with seven fields. Not all of the fields are regulation size.

Several area elementary, middle, and high schools offer fields which are scheduled directly through Prince George's County Public Schools.

Bowie State University (BSU) recently converted its football field to an artificial field surface. Home to the BSU football team, the newly surfaced field opened in 2010. The project was financed by a \$1 million grant from the Maryland General Assembly. According to BSU officials the field is primarily used for BSU football and related camps and clinics. The site is available for outside rentals but is rarely utilized for non-BSU activities.

Prince George's Community College (PGCC) has two fields on its campus. A recently installed Bermuda grass field serves as the college's primary game field while the non-Bermuda, natural grass field is used for practices. The Bermuda grass field is heavily utilized by the PGCC men's and women's soccer programs as well as outside rentals such as the Developmental Academy of MLS's D.C. United.

The Prince George's Sports and Learning Complex in Landover is a multi-purpose, community facility that has a Computer Center and Children's Center as well as sports-focused facilities. The indoor sports facilities include a 20,000 square foot Fitness Center; a Field House with a 200-meter, six-lane, oval indoor track with seating for 3,500; an Aquatic Center with a 50-meter, Olympic-size pool and diving area as well as wet classrooms and seating for 900; and a 25,000 square foot Gymnastics Center with seating for 900. The Complex's outdoor facilities include a lighted, 400-meter, eight-lane outdoor track; a regulation field that can host soccer, lacrosse, and football; a support building with meeting space, locker rooms, and a concessions area. The stadium has permanent seating for 5,500. The Festival Field, a 500-square-foot grassy area, and the Upper Field host various community festivals, corporate events and family reunions.

### Regional Sports Complexes

#### *Carsins Run Turf Farm*

Located in Aberdeen, the Carsins Run Turf Farm is an eight-field natural grass turf complex. The park, which is privately owned, hosts soccer and lacrosse tournaments. The Cedar Lane Sports Foundation utilizes Carsins Run as additional fields for their major tournaments.

#### *Cedar Lane Regional Park*

Located in Bel Air, Cedar Lane Regional Park is owned by Harford County and managed by the Cedar Lane Sports Foundation in conjunction with the Harford County Parks and Recreation Department. The facility contains 13 total fields - 12 are natural grass and one is a synthetic surface with lights. Ten of the fields are regulation size and three are jumbo fields. There is also a baseball diamond that can be converted to full or small-sided games.

Opened in 2008, Harford County funded the \$3.7 million cost for the fields and parking lots. The lighted, synthetic field was not part of the park's original construction. The County paid \$800,000 to install the artificial surface and the Cedar Lane Sports Foundation funded the lighting which cost \$150,000. In 2012, seating for 700 spectators was added to the synthetic field.

The Cedar Lane Sports Foundation and Greater Bel Air Community Foundation are currently raising funds to build a \$200,000 events center that is anticipated to include a concession stand, water stands, and other support amenities for the fields.

In 2012, the park is scheduled to host various lacrosse, soccer, field hockey and football activities including the MSYSA State Cup over two weekends in April and 15 other weekend tournaments. A new minor league professional soccer team, the Baltimore Bohemians, began play at Cedar Lane in 2012. The Bohemians are part of the United Soccer Leagues Premier Development League. Cedar Lane Regional Park attracted 282,580 visitors in 2011.



### *Lucido Fields at Covenant Park*

Located in Ellicott City, Maryland, the eight-field complex has three artificial surface fields and five natural grass fields. The fields are owned and operated by the Soccer Association of Columbia – Howard County. The complex opened in 2004 at a cost of approximately \$5.5 million.

### *Maryland SoccerPlex*

Opened in 2000, the Maryland SoccerPlex has a total of 24 fields including 19 natural grass fields, three artificial surface fields, eight indoor surfaces, and the Championship Stadium which has 3,200 permanent seats on one side and natural grass. The stadium can be expanded with temporary seats on an as-needed basis. Located in Germantown, the SoccerPlex was created through a public-private partnership between the M-NCPPC and the Maryland Soccer Foundation (MSF). The MSF is responsible for the operations, management, and scheduling of the complex.

On-site is the Discovery Sports Center, a multi-sport indoor facility that has two synthetic turf fields with netting for indoor soccer, lacrosse, field hockey, baseball, and rugby from November through February. From March to November, the Center is converted to eight basketball or volleyball courts. There are also locker rooms, restrooms, meeting/conference space, an arcade, and a café.

The MSF created and manages the club soccer and league program called the Soccer Association of Montgomery (SAM). All games of SAM are played at the SoccerPlex. Programs are available for youth as young as three years old to Premier teams. There are also camps, clinics, and tournaments available through SAM at the SoccerPlex. There are multiple other soccer clubs that utilize the SoccerPlex including: Montgomery Soccer Inc.; Bethesda Soccer Club; Damascus Soccer Club; Potomac Soccer Association; Catholic Youth Organization; Seneca Soccer Association; Seneca Sports; Olney Soccer Club; and Washington International Soccer League.

In 2012, the Maryland SoccerPlex is scheduled to host 21 total soccer and lacrosse tournaments. The Discovery Center also holds basketball and volleyball tournaments indoors throughout the year. The complex typically attracts more than 600,000 users annually.

### Potential Demand Generators

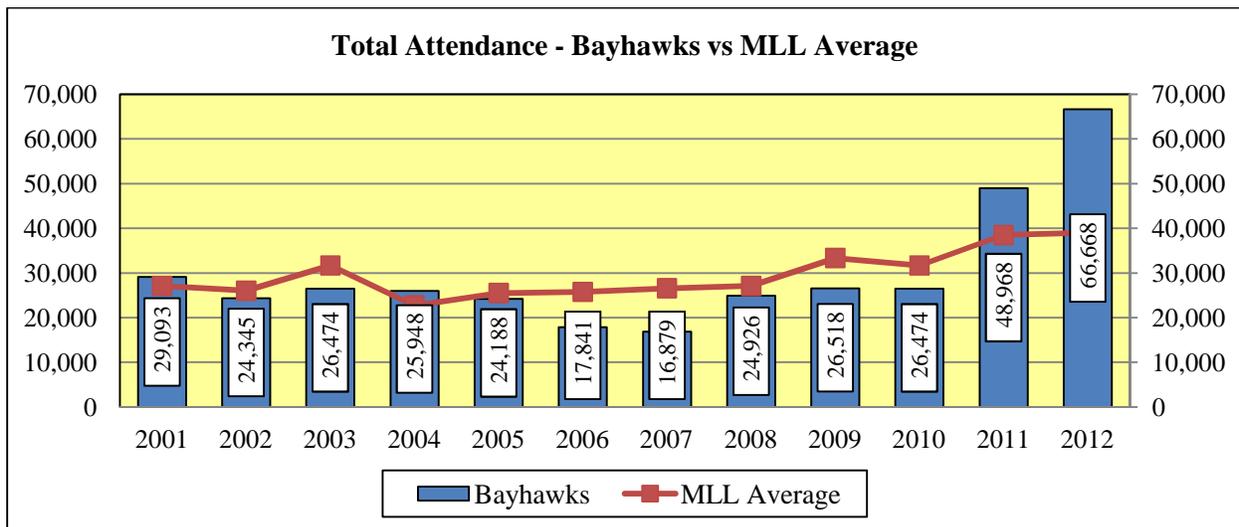
In order to assist the County and the MSA assess demand for the proposed new MLL stadium/multi-field sports complex, direct input was obtained from representatives that host various outdoor sports and entertainment events that could potentially use the proposed new MLL stadium/multi-field sports complex including, but not limited to, lacrosse, soccer, rugby, cricket, ultimate Frisbee, and concert/entertainment acts. Interviews were conducted with individuals from private club programs, community-based youth programs, tournament promoters, national governing bodies, national sports sanctioning organizations, concert and family show promoters, and universities to gauge their interest in hosting events at the proposed new MLL stadium/multi-field sports complex as well as to understand their program requirements and event characteristics. This section provides a brief description of the potential user groups that were surveyed as well as a summary of their relative interest in hosting events at the proposed new MLL stadium/multi-field sports complex in Prince George’s County. Input is segregated by sport although some tournament producers promote multiple sports.

#### Lacrosse

##### *MLL Chesapeake Bayhawks*

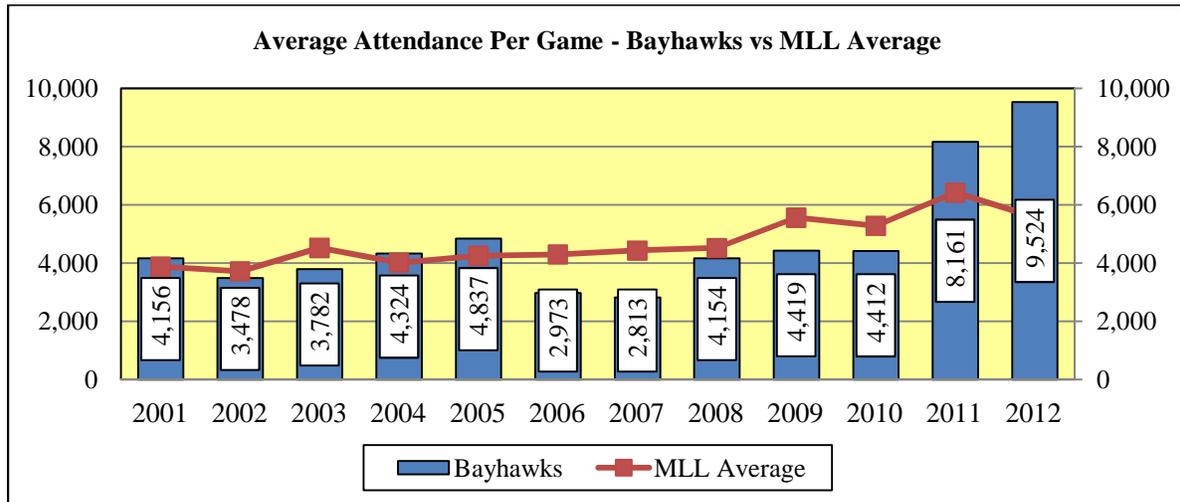
The Bayhawks were one of the six original teams when the MLL formed in 2001. The Bayhawks have won four MLL Championships (including 2012) and four division titles and are one of the winningest MLL teams. Over the years, the team has transitioned from the Baltimore Bayhawks to the Washington Bayhawks to the Chesapeake Bayhawks which the new ownership group changed in 2010 to be more reflective of the region.

The graphs that follow compare attendance at Bayhawks games to the MLL average. Between 2001 and 2012, total attendance at Bayhawks games averaged nearly 29,900 which was consistent with the MLL average (29,600) during the same period. Bayhawks total attendance ranged from a low of 16,879 in 2007 to a high of 66,668 in 2012. The team’s total attendance was at or above the MLL average in 2001, 2004, 2011 and 2012. In 2011, total attendance at Bayhawks games increased by 85% which was followed by another increase of 36% in 2012.



Source: MLL.

Average attendance per game has fluctuated from a low of 2,813 in 2007 to a high of 9,524 in 2012. During the last 12 years, the Bayhawks have averaged nearly 4,750 fans per game which is comparable to the MLL average of 4,700. The Bayhawks average attendance per game was higher than the MLL average five of the 12 years. In 2011, Bayhawks average attendance per game increased by 85% in 2011 and 17% in 2012 when MLL played seven games.



Source: MLL.

The following table compares the Bayhawks total attendance to other MLL teams over the last five years. The Outlaws, Cannons and Bayhawks have consistently led the league in total attendance. Although total attendance has fluctuated over the past five years, MLL teams reached a record high of 312,000 in 2012. Over the last five years, the Denver Outlaws have led the league in attendance with an average of more than 64,800 followed by the Boston Cannons (55,140)

MLL - Comparison of Total Attendance (2008-2012)						
Team	2008	2009	2010	2011	2012	Average
Boston Cannons	58,191	48,478	49,540	51,971	67,534	55,143
<b>Chesapeake Bayhawks</b>	<b>24,926</b>	<b>26,518</b>	<b>26,474</b>	<b>48,968</b>	<b>66,668</b>	<b>38,711</b>
Denver Outlaws	65,118	60,764	64,669	73,989	59,471	64,802
Charlotte Hounds					39,988	39,988
Rochester Rattlers	20,430			25,842	25,548	23,940
Ohio Machine					24,876	24,876
Long Island Lizards	21,330	25,822	18,786	22,966	17,147	21,210
Hamilton Nationals		23,080	16,379	7,287	10,775	14,380
Chicago Machine	13,116	15,414	14,185			14,238
Los Angeles Riptide	21,885					21,885
Philadelphia Barrage	17,573					17,573
San Francisco Dragons	16,851					16,851
New Jersey Pride	11,522					11,522
<b>Total Attendance</b>	<b>270,942</b>	<b>200,076</b>	<b>190,033</b>	<b>231,023</b>	<b>312,007</b>	<b>240,816</b>
<b>Avg/Team</b>	<b>27,094</b>	<b>33,346</b>	<b>31,672</b>	<b>38,504</b>	<b>39,001</b>	<b>33,923</b>

Notes: Sorted in descending order by 2012 attendance.

In 2008, the Philadelphia Barrage played as road team with games in Cary (NC), Dallas, Portland, St. Louis, Virginia Beach.

In 2010, the Chicago Machine played as a road team with games in Albany, Cary (NC), Columbus, Pittsburgh, Rochester, Virginia Beach.

Source: MLL.

Although the Bayhawks average attendance per game was below the MLL average from 2008 to 2010, it was significantly higher than the league average in both 2011 and 2012. There is a relatively large disparity in average attendance per game among teams. Hamilton's total attendance for the entire 2012 season (10,775) was just above what both Boston Cannons and the Chesapeake Bayhawks average per game.

MLL - Comparison of Average Attendance Per Game (2008-2012)						
Team	2008	2009	2010	2011	2012	Average
Boston Cannons	9,699	8,080	8,257	8,662	9,648	8,869
<b>Chesapeake Bayhawks</b>	<b>4,154</b>	<b>4,420</b>	<b>4,412</b>	<b>8,161</b>	<b>9,524</b>	<b>6,134</b>
Denver Outlaws	10,853	10,127	10,778	12,332	8,496	10,517
Charlotte Hounds					5,713	5,713
Rochester Rattlers	3,405			4,307	3,650	3,787
Ohio Machine					3,554	3,554
Long Island Lizards	3,555	4,304	3,131	3,828	2,450	3,454
Hamilton Nationals		3,847	2,730	1,215	1,539	2,333
Chicago Machine	2,186	2,569	2,364			2,373
Los Angeles Riptide	3,648					3,648
Philadelphia Barrage	2,929					2,929
San Francisco Dragons	2,809					2,809
New Jersey Pride	1,920					1,920
<b>Average/Team</b>	<b>4,515</b>	<b>5,557</b>	<b>5,278</b>	<b>6,417</b>	<b>5,572</b>	<b>5,468</b>
<b>Maximum</b>	<b>10,853</b>	<b>10,127</b>	<b>10,778</b>	<b>12,332</b>	<b>9,648</b>	<b>10,517</b>
<b>Minimum</b>	<b>1,920</b>	<b>2,569</b>	<b>2,364</b>	<b>1,215</b>	<b>1,539</b>	<b>1,920</b>

Notes: Sorted in descending order by 2012 attendance.

In 2008, the Philadelphia Barrage played as road team with games in Cary (NC), Dallas, Portland, St. Louis, Virginia Beach.

In 2010, the Chicago Machine played as a road team with games in Albany, Cary (NC), Columbus, Pittsburgh, Rochester, Virginia Beach.

Source: MLL.

The Bayhawks averaged more than 9,500 fans per game in 2012 which was approximately 28% of the capacity (34,000) at Navy-Marine Corps Memorial Stadium. MLL teams averaged 22% of stadium capacity in 2012.

2012 Average Attendance Per Game as a % of Stadium Capacity			
Team	Average Attendance Per Game	Stadium Capacity	Percent Capacity
Boston Cannons	9,648	30,323	32%
<b>Chesapeake Bayhawks</b>	<b>9,524</b>	<b>34,000</b>	<b>28%</b>
Denver Outlaws	8,496	76,125	11%
Charlotte Hounds	5,713	24,000	24%
Rochester Rattlers	3,650	13,768	27%
Ohio Machine	3,554	9,100	39%
Long Island Lizards	2,450	13,000	19%
Hamilton Nationals	1,539	6,000	26%
<b>Average</b>	<b>5,572</b>	<b>25,790</b>	<b>22%</b>
<b>Average Excluding Denver</b>	<b>5,206</b>	<b>19,498</b>	<b>27%</b>

Source: MLL; management at individual teams and stadiums.

In summary, although satisfied with their current home in Annapolis and the relationship with the U.S. Naval Academy, Bayhawks officials indicated that a new lacrosse-specific stadium in Prince George's County would allow them to further diversify and increase their fan base. In addition, the proposed adjacent multi-field sports complex would allow them the opportunity to increase their grassroots marketing efforts with area youth.

#### *US Lacrosse*

US Lacrosse officials indicated that it is very challenging to find multiple, quality fields on a regional and national basis. Ideally, the complex would have 12-16 fields in quadrants of four fields. To achieve maximum usage for lacrosse events artificial turf surfaces is a requirement. To extend the use for youth athletic practices on weekdays lighting would be crucial.

US Lacrosse has been actively pursuing a new location in the Baltimore, Maryland area for a new Headquarters, Hall of Fame, and small capacity venue. The venue would be approximately 2,500 seats and used for National Team Training, creating of training videos for players and coaches, and potentially for college games and exhibition games.

A key to success, as suggested by US Lacrosse officials, is balance in bookings. As a multi-sport athletic facility it is important for all sports to feel welcome and have the ability to book their events irrespective of the sport being soccer, lacrosse, field hockey, etc. Soccer has a tremendous number of players and while lacrosse is growing rapidly the competition for field space can become dominated by soccer needs. US Lacrosse officials indicated a high likelihood of bringing one national event annually to the athletic field complex.

#### *National Collegiate Athletic Association*

The National Collegiate Athletic Association (NCAA) is the governing body for athletic programs for colleges and universities in the United States. Headquartered in Indianapolis, Indiana, the NCAA manages the championships for Division I, II, and III men's and women's sports.

As stated previously, the NCAA has hosted the Men's and Women's Lacrosse Championships in Maryland several times in recent years. The NCAA Women's Lacrosse Championship was held at Towson University in 2008 through 2010, and also has been held over the past twenty years at Navy, Loyola, Johns Hopkins, UMBC, and University of Maryland. The NCAA Men's Lacrosse Championship has been held at Johns Hopkins, University of Maryland, and most recently in Baltimore at M&T Bank Stadium in 2007, 2010, and 2011. The Men's and Women's Soccer Championships have not been held in Maryland.

The NCAA Men's Lacrosse Championship hosts all three Divisions in one location and has a recent history of playing in NFL-sized stadiums including, most recently, Gillette Stadium in Foxborough, Massachusetts, and M&T Bank Stadium in Baltimore. Men's lacrosse can be played on an artificial surface field. The NCAA Women's Lacrosse Championship game averages approximately 7,500 spectators and can be played on an artificial surface field.

Auxiliary fields are a key to successfully hosting a NCAA Championship. There are many activities that are part of a NCAA Championship including a Fan Fest, youth clinics, and tournaments. For both soccer and lacrosse championships, it is highly encouraged to not embed permanent lines on any playing surface. The fields should have clean lines for that specific sport and have paintable, washable lines.

All bids for NCAA Championships must be submitted by a NCAA member institution or conference. One of the potential challenges, cited by the NCAA, may be that Maryland-area NCAA universities would likely prefer to keep a Championship on their campus or with an established venue that they have successfully hosted with previously. It may be possible to bid on Men's Lacrosse quarterfinal games which would result in four games over the course of two days.

NCAA officials indicated that while it is permissible to play the Men's and Women's Soccer Championships on an artificial surface it would be difficult to imagine the Soccer Committees selecting an artificial surface for the Championships. A natural grass field is highly preferable for soccer. Additionally, the Championships are held in mid-December creating a potential for inclement weather situations. For both the Men's and Women's Soccer Championships there is an average attendance of 8,000 with the NCAA citing an ideal stadium size of 12,000.

#### *Atlantic Coast Conference*

The Atlantic Coast Conference (ACC) is a collegiate athletic conference which is currently comprised of the following 12 universities: Boston College; Clemson University; Duke University; Florida State University; Georgia Institute of Technology; University of Maryland-College Park; University of Miami; University of North Carolina; North Carolina State University; University of Virginia; Virginia Tech; and Wake Forest University. However, the University of Maryland's Board of Regents unanimously approved the shift from the ACC to the Big Ten Conference. The ACC hosts 25 Championships annually in various sports including men's and women's lacrosse.

ACC officials were interested in the stadium concept for their men's and women's lacrosse championships. The men's and women's championships have recently been held at separate locations but there is history of the championships being played at one location. One appeal of the stadium is the built-in attention to lacrosse created by the Chesapeake Bayhawks playing at the stadium and creating a fan base for lacrosse events.

There is concern about the artificial surface as their lacrosse coaches tend to prefer a natural grass surface. However, with the proposed stadium being the home field for a MLL professional team, ACC officials believe that there may be interest from their coaches to play on a professional-level, quality, artificial surface field. ACC officials noted the proposed stadium size as a concern noting that the preferred capacity for their events is typically in the 10,000 to 12,000-seat range.

A key to a successful bid for an ACC Championship event is having a modern stadium with current technology. Items that must be in a stadium facility include a video board, score board, internet access with strong signals, four locker rooms, and television accommodations.

If an ACC Lacrosse Championship went to the proposed complex, it would be on a 2+ year rotation. The ACC does not require a host institution, as NCAA Championships do, as the ACC staff promotes the event and handles all event details. ACC Soccer Championships have played the SoccerPlex in Germantown on multiple occasions but their coaches prefer natural grass and do not anticipate a move to artificial surface fields.



### *Bowie State University*

Bowie State University (BSU), a member of the NCAA's Division II, and the Central Intercollegiate Athletic Association conference, offers 13 men's and women's sports. Those sports include football, basketball, indoor and outdoor track and field, cross country, bowling, softball, tennis, and volleyball. BSU does not offer soccer or lacrosse. BSU football plays at their on-campus field that is artificial turf and has seating for nearly 3,000 and is expandable with temporary seating. BSU's football field currently does not have lights and is looking to add lights in the near future. The football field meets the needs of their athletics program and officials do not anticipate the need for off-site fields at this time. The only circumstance that BSU officials cited was if their homecoming game exceeded their on-campus football field capacity and they were able to fill 10,000+ seats.

### *Prince George's Community College*

Prince George's Community College (PGCC), a member of the National Junior College Athletic Association (NJCAA), hosts 10 varsity sports including men's and women's soccer.

PGCC recently installed a Bermuda natural grass field on their Largo campus. The field becomes dormant in mid-October and is not fully playable until May 1<sup>st</sup>. Due to the delicate conditions of a Bermuda grass field there is a need for alternative field options for part of the year. There are other users of the PGCC primary field including DC United's Development Squad on Saturdays from March to April, the Maryland State Youth Soccer Association's Olympic Development Program, and summer camps and clinics. However, PGCC carefully schedules usage so that the field is in prime shape for August 1<sup>st</sup> when their soccer programs begin.

PGCC officials could consistently use one field during certain parts of the year if the proposed multi-field sports complex is affordable and available during specific, desired time slots. There are two seasons for men's and women's soccer: 1) Fall season that begins August 1<sup>st</sup> and is finished mid-November; and 2) Scrimmage season that begins March 1<sup>st</sup> and runs through the end of April. Since the Bermuda grass field is essentially offline for four weeks in the Fall, PGCC may be interested in holding their men's and women's soccer practices at the new multi-field sports complex. Practices would occur on one field for four hours total on three days. Additionally, there would be two game days per week utilizing one field for a total of four hours each day.

The scrimmage season begins on March 1<sup>st</sup> and runs through the end of April. PGCC officials could see the men's and women's soccer programs playing their practices/scrimmages three days per week for four hours per day on one field.

PGCC hosted the NJCAA Women's Soccer Championship in 2010 and due to weather conditions had to move the tournament to Anne Arundel Community College. PGCC officials would bid on both the men's and women's NJCAA Men's and Women's Soccer Championships and could envision each receiving the bid for two consecutive years with the men's tournament one year and the women's tournament the next year, then a year off, then repeating the rotation.



The Championship has 12 teams that play a Monday through Saturday schedule. On Monday-Wednesday, there are eight total games with four games being played on two fields. Thursday is a rest day. The semifinals are held on Friday with a total of two games each being played on their own field for a total of two fields needed. The Championship game is held on Saturday.

Unless a Maryland team qualifies for the Championship all 12 teams are from out-of-state. Each team carries a roster of 24 players and the traveling party has six coaches and four staff members. Two or three of the teams carry a cheerleading squad of 12 members. Spectators generally average 250 for the playoffs and 1,000 to 5,000 for the semifinals and the Championship game. The range is large with larger crowds seen in smaller communities and smaller crowds in larger communities. For instance, Herkimer, New York, a regular host of the NJCAA Soccer Championships, is a smaller community and they average 5,000 for the semifinals and finals while there were 1,000 fans in Florida recently for the Women's Soccer Championship.

The NJCAA Soccer Championship would utilize regular fields during the playoff rounds and would look to utilize a stadium for the semifinals and finals were it a smaller capacity, ideally, 5,000 seat capacity. The complex would need to have the ability to ticket events, have controlled access, a minimum of three locker rooms for teams and referees, concession stands, press facilities, and Wi-Fi access. The Championship can be played on artificial turf.

In 2010 when PGCC hosted the NJCAA Division III Women's Soccer Championship they utilized the Gaylord Hotel property for 120 rooms for five days and 70 rooms for three days. They also utilized the Days Inn in Laurel for overflow using 20 rooms for seven days. Additional rooms were used as well but not tracked.

#### *Prince George's County Public Schools*

While lacrosse is not a sport currently offered in the Prince George's County Public School (PGCPS) system, there is boys and girls soccer at all of their high schools. Sports programs are not offered in the middle schools. Officials indicated that they are looking to institute girls' varsity and junior varsity lacrosse at all of their 22 high schools in three years and in five years for the boys programs.

The high school programs will need additional field space to accommodate these programs. PGCPS high schools all have a multi-purpose field that is used by football and soccer, but field space will become challenging with the addition of lacrosse. Only three high school fields are lighted. PGCPS currently also utilize middle school fields based on availability. PGCPS envisions the need to use the proposed facility for afternoon practices for lacrosse and potentially soccer as well.

The stadium component may be of interest if it is reasonably priced. PGCPS is considering the creation of "games of the week" and the stadium may lend itself well to football games given the lights and the capacity. These games may be double-headers that could possibly occur on Thursdays, Fridays, and Saturdays.



### *Elite Tournaments*

Established in 2000 and based in Mount Airy, Maryland, Elite Tournaments is a leading promoter of soccer, lacrosse, and field hockey tournaments in the mid-Atlantic region with rapid expansion nationally in recent years. They currently promote tournaments in 14 states including Maryland, Washington, Texas, Kansas, Arizona, Kentucky, North Carolina, Ohio, Pennsylvania, Delaware, and Virginia. The company has promoted more than 150 youth soccer events at all levels including clubs, colleges, international, and professional organizations. Elite managed 18 tournaments in 2011 and 42 in 2012.

In 2011, Elite signed a partnership agreement with the National Soccer Coaches Association of America (NSCAA) to stage elite showcase tournaments and coaching education events across the United States. Elite is developing and managing 12 elite showcase tournaments for the NSCAA that will connect collegiate soccer coaches with youth soccer players. Additionally, there will be coaching educational courses for team coaches involved. This partnership is a part of the reason for Elite's recent increase in the numbers of events that they produce.

Elite organizes many large-scale tournaments in Maryland including the Columbia Invitational which is held over Memorial Day Weekend. This tournament typically has over 600 teams accounting for a total of 10,800 players and 32,400 spectators. The Columbia Invitational is so large that the tournament utilizes fields in five different counties in Maryland. The economic impact of this one tournament is calculated at \$4 million to the area.

In addition to the Columbia Invitational, Elite also produces the OBGC Capital Cup, SAC Columbus Day Tournament, Columbia Fall Classic Weekends, Baltimore College Showcase, and Southern Maryland Classic among others. Elite typically hosts 95% of their Maryland events in Montgomery County and Howard County due to their location on the 95 corridor and their parks/complexes with multiple fields. However, a single complex with 10 lighted fields with artificial turf could change that dynamic. Based on the density of fields in one single location, the artificial turf surface, and the lighting, Elite officials expressed interest in holding 12 tournaments at the proposed multi-field sports complex from Spring through Fall. Tournaments are held on Saturdays and Sundays and Elite would require a minimum of eight fields, with 10 fields being sufficient and 12 fields being ideal. A 22,000-seat stadium would not likely be utilized by Elite Tournaments for their events.

Elite currently does not promote tournaments at the Maryland SoccerPlex due to the cost structure and that the fields are not usable after heavy rains.

Elite cited the ability to use its own housing service as an important consideration when selecting a tournament location. Sufficient parking and facility cost structure were also mentioned as key factors in the site selection process. Additional desired design elements include a tournament office with Wi-Fi and office space for referees.



### *Aloha Tournaments*

Aloha Tournaments is a Phoenix, Maryland-based tournament promotion company that was founded in 1999. The company is promoting 19 tournaments in 2012 across the country including Maryland, Massachusetts, Nevada, Georgia, Alabama, North Carolina, and Ohio with the majority of their events in the mid-Atlantic. In 2011, over 35,000 lacrosse players participated in Aloha Tournaments that brought more than 30,000 spectators. Aloha promotes large-scale lacrosse tournaments with 400+ teams as well as field hockey events.

Aloha utilizes the infield of the Maryland State Fairgrounds in Timonium for many of their tournaments including their Warrior Lax Splash, Warrior Lava Lax, and Brine Summer Sizzle Tournaments. Six years ago, Aloha struck a deal with the Maryland State Fairgrounds to maintain the infield grass. Aloha also utilizes the Maryland Polo Fields in Jarrettsville for two of their tournaments and Cedar Lane for tournaments and Club programs. A total of 11 of Aloha Tournaments are held in Maryland with tournaments occurring in June, July, October and November. Aloha also manages the Breakers Lacrosse Club which has 150 middle school and high school players participating.

Officials with Aloha expressed interest in potentially utilizing the proposed field complex to host existing tournaments as well as new tournaments that could be created. Key criteria for the complex to host tournament activity include attention to flow so that participants and spectators funnel through a Fan Zone area with vendors, sponsors, and entertainment, the importance of civic leaders being involved, ability for the complex to accommodate different sports including lacrosse, field hockey, rugby, soccer, affordability, parking to handle heavy tournament traffic, spectator seating, and adequate restrooms. Although Aloha officials indicated a preference for natural grass fields, they cited the need for artificial fields to be in the mix.

### *Hogan Lacrosse*

Matt Hogan, the owner of Hogan Lacrosse, organizes and promotes lacrosse tournaments and operates the Annapolis Hawks Lacrosse Club. Hogan Lacrosse promotes five large-scale tournaments annually in addition to skills clinics and camps in Maryland and Pennsylvania.

Hogan Lacrosse officials indicated an interest in utilizing the proposed field complex for two tournaments. The Summer Exposure Lacrosse Tournament currently utilizes 36 fields in Maryland including Bell Branch Park and Crofton Complex in Gambrills, Broadneck High School and Park in Annapolis, Davidsonville Park in Davidsonville, and South River High School in Edgewater.

Summer Exposure is held annually in mid-June over the course of two days. Summer Exposure has a total of 270 teams that carry an average of 23 players on each team for a total number of players of 6,210. Of the 270 teams, 145 teams are from Maryland, 10 are from Canada, and the remaining 115 are from states other than Maryland.

The Fall Brawl is held annually in November at Chesapeake High School in Pasadena, Maryland. The tournament is a two-day event that uses a total of nine fields. There are 50 teams representing 1,150 players. Approximately 10% utilize hotel rooms equating to 260 hotel rooms over two nights and the majority not needing housing options.



Hogan Lacrosse officials indicated that they are looking for a permanent home field for their Annapolis Hawks Lacrosse Club teams which currently utilize fields throughout Anne Arundel County. The club program has nine teams that have tryouts and practices from March through November. The teams have weekly practices on weekdays and skills sessions and tryouts on weekends.

Hogan Lacrosse officials cited the following as important factors for a tournament site: quality fields that are Bermuda, fescue, or artificial surface; safety netting behind the goals; ample parking; and sufficient restrooms to handle the size of the event. A strong management team that provides the needed services and also allows the tournament promoter flexibility makes a site more appealing.

#### *Prince George's Pride Lacrosse*

The Prince George's Pride Lacrosse program is a non-profit organization dedicated to providing boys and girls between the ages of six and 15 years old the chance to learn and play lacrosse. They play organized games in league play. Currently, the Prince George's Pride has five teams – four of which play a competitive schedule. The Pride is an independent organization.

Officials indicated that Bowie would be too far of a drive for parents/children to travel for weekly practices. Games are primarily played in Bowie on the Mitchellville grass fields. Representatives indicated that it would be unlikely that they would use either the proposed MLL stadium or the multi-field sports complex for their events.

#### *Bowie Boys and Girls Club – Girls Lacrosse*

The Bowie Boys and Girls Club (BBGC) runs the primary instructional lacrosse organization in the Bowie and Prince George's County area outside of the private club programs. There are 110 participants during the spring season and approximately 130 to 150 participants during the summer and fall seasons. During the winter months they shift to indoor play. Approximately half of the players are from Prince George's County with the remainder coming from Anne Arundel, Calvert, and Charles Counties. The BBGC plays in the Anne Arundel County lacrosse league.

The program practices and conducts instructional clinics at the Mitchellville fields. However, games are only played in Anne Arundel County due to the fact that the turf field in Bowie is not lined for girls' lacrosse. During the Fall season, there are only three programs offering girls lacrosse and BBGC is the only non-profit club.

The BBGC girls' lacrosse program is interested in utilizing the proposed field complex. Costs, however, are a primary concern for the volunteer-run, non-profit organization. If the fields were affordable for their program, the BBGC girls' lacrosse program would anticipate using the fields on a regular basis for their spring, summer and fall programs.

## Soccer

### *US Youth Soccer*

US Youth Soccer had more than three million registered players between the ages of 5 and 19 years old in 2011 including more than 66,000 in Maryland. US Youth Soccer has multiple entities including US Youth Soccer Presidents Cup; Soccer Across America; TOPSoccer; Kohl's US Youth Soccer American Cup; Youth Soccer Month; US Youth Soccer Olympic Development Program; US Youth Soccer National League; and US Youth Soccer National Championship Series.

US Youth Soccer would embrace a multi-field complex in a highly densely populated area such as Bowie and Prince George's County due to constant demand for field space for their programs. Artificial turf would create more usage opportunities and lighting would be critical to extending usage.

While ten fields is a large number for local use, it does not support the growing needs of national level tournaments. The ideal number of fields for national tournaments is 16 to 20. As an example, the Overland Park Soccer Complex in Kansas is a unique facility with 12 artificial turf fields and in an area that is highly developed with hotels, malls, restaurants, and family friendly entertainment options. However, even with their 12 artificial turf, lighted fields with excellent participant and spectator amenities US Youth Soccer has outgrown the Complex.

Critical issues that US Youth Soccer considers when booking events are the number of fields, hotel inventory, and restaurant inventory. Hotels and restaurants need to be within a 30 minute drive of the complex. US Youth Soccer's national tournaments also host meetings for their officials requiring meeting space and a full-service hotel.

### *US Club Soccer*

US Club Soccer is a non-profit organization that supports the development of competitive soccer clubs and is a National Affiliate with the USSF. Founded in 2000, it has over 2,300 members in 49 states. US Club Soccer has a partnership with MLS to develop youth players and competitions. In 2004, it partnered with Disney's Wide World of Sports Complex to launch the Champions Cup.

US Club Soccer has a program called id2 which is US Club Soccer's national identification and development program that provides an opportunity for the country's top youth talent to be identified and developed for possible inclusion in the U.S. Soccer's National Team programs.

The playing surface of fields is of particular concern to US Club Soccer. They prefer to play summer events on natural grass rather than an artificial playing surface. In their experience, artificial turf and its rubber pellets can heat to extremely high degrees creating an uncomfortable situation for their players. However, they do play on artificial surface fields in the Fall from September through November.

US Club Soccer manages approximately 40 events annually, 10 to 15 of which are located on the East Coast. US Club Soccer officials indicated interest in the field complex was it to be constructed for some of their tournaments. A challenge for them would be determining the levels of support by local soccer clubs that are US Club Soccer members. Officials indicated that they could potentially host two tournaments annually at the proposed complex.



US Club Soccer has a bid process for awarding their events. In addition to the support of local clubs, criteria in their decision making includes: density of their club programs in an area; rental costs of the complex; quality of the fields; management of complex; and amenities of the complex including parking, restrooms, and office space.

#### *Maryland State Youth Soccer Association*

With 58,000 members, the Maryland State Youth Soccer Association (MSYSA) is the largest association for youth soccer in the State of Maryland. Membership has been growing with an increase of 4,000 members in the past two years. Membership is open for children as young as seven years old to a maximum of 19 years old.

MSYSA hosts many large scale tournaments including the Maryland State Cup, the Region I Championship, and the President's Cup. In affiliation with US Youth Soccer, MSYSA also runs the Olympic Development Program (ODP) which is a national identification and development program for high-level players. In the State of Maryland, there are 300 players that are accepted into the ODP.

MSYSA hosts many of its tournaments and practices at the SoccerPlex in Germantown and Cedar Lane Regional Park in Bel Air. Both of these complexes have multiple fields, some of which offer lights. The MSYSA is looking for guaranteed dates and times for their practices and events.

With such a large youth soccer movement in the State of Maryland, there is a significant need for more quality fields that are affordable. One of the challenges in Maryland for soccer is the new competition for field space with lacrosse teams, especially in the spring. Having an artificial turf playing surface and lights is conducive for MSYSA training and practices on a daily basis, however, the State Cup and Region I tournament must be played on natural grass.

The MSYSA would consider utilizing the stadium for its opening ceremonies for the Region I tournament but only if they could utilize 22 natural grass fields in the Bowie area for tournament play.

The MSYSA is supportive of the creation of new fields for club soccer use. MSYSA officials indicated that a minimum of eight fields is required and that 10 to 12 fields are ideal. Artificial turf and lights are imperative to maximize usage of the fields and extend the playing day.

#### *Maryland Public Secondary School Athletic Association*

The Maryland Public Secondary School Athletic Association (MPSSAA) is responsible for the promotion, direction, and regulation of interscholastic athletics of the public high schools as well as ensuring a safe and educationally balanced program. The MPSSAA was founded in 1946 and is comprised of 195 public high schools with over 114,000 student-athletes that participate in 24 sports.

The MPSSAA hosts its State championships at a variety of venues including M&T Bank Stadium; Cole Field House; Comcast Center; UMBC RAC Arena and Stadium; Washington College; UMCP's Ritchie Coliseum, Golf Course, Natatorium, and Softball Stadium; Hughes Stadium at Morgan State; Ripken Stadium; and PG Sports & Learning Complex. The MPSSAA's girls' and boys' soccer and lacrosse Championships are held at University of Maryland Baltimore County's Stadium.

MPSSAA representatives indicated that they strive to provide the best facilities in the State for their championships. Important factors in their booking decisions include accessible parking, a minimum of four locker rooms for teams and officials, training rooms for student-athletes, concessions for their spectators, central location within the State, and the highest quality venue available.

MPSSAA would consider the proposed multi-field sports complex for their boys and girls soccer Championships. The complex would need to have two or three fields that each had a seating capacity of 2,000 for their semifinal games and would likely host their finals at the stadium if it had a capacity of 5,000 or greater. The fields would need to have controlled access for paying spectators, lighting, restrooms, concessions, and ticket windows. Without a controlled access the MPSSAA cannot play their Championships there as the gate pays for a significant portion of their events. Access to hotels and restaurants is not a consideration when awarding their Championships to sites.

The MPSSAA fields four classes for both boys and girls creating 16 games for the semifinals on one long weekend. Eight semifinal games would be played on Friday and eight games would be played on Saturday. For the finals, two games would be played on Thursday, two games on Friday, and four on Saturday.

MPSSAA would not consider moving its lacrosse Championships to the proposed complex because they think the northern part of Maryland has a longer tradition of lacrosse at their schools.

#### *Maryland Interscholastic Athletic Association and Interscholastic Athletic Association of Maryland*

The Maryland Interscholastic Athletic Association (MIAA) and the Interscholastic Athletic Association of Maryland (IAAM) are independent organizations that govern athletics at private and parochial schools. The MIAA is comprised of 27 private high schools with a combined enrollment of over 20,000. The IAAM consists of 31 private and parochial schools. The MIAA has been concerned with finding quality fields on a consistent basis for their championship games and their high profile regular season games including football, soccer, and lacrosse. The MIAA has been in negotiations with Baltimore County regarding the construction of a stadium complex that would include a 6,000-seat stadium and 2,000 parking spaces. The IAAM is involved with these negotiations for their venue needs. The complex would encompass 42 acres and allow the MIAA and IAAM to have a guaranteed location for their championship events and high profile regular season games. The MIAA and IAAM are privately funded and do not have State funding. At this time of this report, this project is on hold due to financial concerns.

Currently, the MIAA plays their championships at a variety of venues throughout the Baltimore Metro region. Lacrosse and football are played at Towson University and soccer is played at UMBC for their A and B Conferences and Calvert Hall for their C Conference.

The stadium portion of the proposed complex is of interest to the MIAA while the athletic field complex is not needed. MIAA officials indicated that an artificial turf surface would be ideal. While they would consider lacrosse or football for the stadium they have the most difficult time finding a location for their soccer championships.

The MIAA has member schools in six counties and Baltimore City but does not have any member schools located in Prince George's County. Officials indicated that the distance to Bowie is of concern as the majority of their member schools are located in the Baltimore Metro area. The gate receipts from attendance are important because they are private schools and do not receive State funding for their programs and Championships. It would not be known if attendance would be as strong for their championships due to the distance from their core schools and base.

MIAA officials cited venue costs and professional, first-class facilities as important factors when considering championship venues.

The IAAM plays their field hockey championships at Bryn Mawr and Goucher College in Baltimore, their soccer championships at Gerstell Academy in Finksburg, and lacrosse championships at Stevenson University in Owings Mills. There is only one member school that is located in the Prince George's County area of the state.

IAAM officials did not feel that they would be in a position to host events at the proposed MLL stadium or athletic field complex. Reasons cited include the complex location with respect to the locations of their member schools, needing a stadium capacity no greater than 2,000 seats, trying to stage IAAM championship games at their member school facilities, and anticipated venue costs.

#### *Freestate Soccer Alliance*

Freestate Soccer Alliance is a club soccer program with 501(c)(3), non-profit status. Based in Bowie, Freestate provides education and instruction for soccer players from the community. They participate in local, state, regional, and national competitions. There are 35 teams and approximately 500 players. Freestate offers programs from U-9 up to U-19.

Freestate officials stated that quality field space is at a premium in the Bowie area. They indicated that one of the artificial surface fields in Bowie is committed to another program which creates an even greater demand for field space for Freestate beginning in the Fall of 2012. They would likely utilize the field complex for 11 months to host practices, summer programs, select club games, and two tournaments. The two tournaments occur in March. Each tournament has approximately 165 teams per weekend drawing approximately 2,475 players and 7,435 spectators, 30% of which are estimated to come from outside of Maryland. Freestate is also exploring the merits of adding another tournament weekend.

While natural grass fields, particularly Bermuda grass, are preferred, Freestate can utilize artificial surface fields. Officials listed the following as key criteria when considering the layout of the complex: a wide enough field to accommodate short-sided play is important for maximizing field space; a designated warm-up space (which can be behind the goals or between fields); and proper drainage for the fields so that play can occur during inclement weather conditions. Other items for consideration cited include sufficient parking; indoor bathrooms that are air-conditioned and heated; covered seating for spectators; and multiple, moveable goals for practices.

## Rugby

### *USA Rugby*

USA Rugby is the national governing body for rugby in the United States. They are members of the United States Olympic Committee and the International Rugby Board (IRB). USA Rugby is responsible for the development of girls, boys, high school, collegiate, and club rugby programs. They are also responsible for the rugby coaches, referees, administrators, and its national teams in the U.S.

USA Rugby has realized growth in membership with over 100,000 members in 2012. The East Coast has always been a strong area for participation for USA Rugby with the South and Colorado experiencing strong growth in recent years. The IRB only allows for international matches to be played on natural grass fields and marquee events in the U.S. are a good fit with MLS-type stadiums. However, USA Rugby officials indicated that they are trying to grow their events on artificial surface fields. Head injuries are of concern to USA Rugby so a quality field surface is of importance.

USA Rugby officials indicated that the location of the proposed complex fits well with their membership base. Three events were cited as possible fits with the proposed complex including the College Seven's Championship, Men's Club Playoffs, and the Women's Club Playoffs and Championship.

The ability to line the field for rugby-specific events is important. Consideration would need to be made for the inserts for rugby goal posts which should be addressed at construction. Affordability of fields and hotels, scoreboards at each field, restrooms, quality locker rooms, office space for staff and officials, area for team tents, and shaded seating areas were also mentioned as key criteria when selecting sites to host USA Rugby events.

### *Potomac Rugby Union*

The Potomac Rugby Union (PRU) is the governing body for all rugby in northern Virginia, DC, Maryland, and parts of Pennsylvania. The PRU is the local area union, the smallest subdivision of the national governing body. The Mid-Atlantic Rugby Football Union (MARFU) is one of seven territorial unions of USA Rugby. MARFU comprises the PRU, Virginia Rugby Union, and Eastern Penn Rugby Union.

The PRU is responsible for competitions at all levels, all-star teams, assisting clubs with administrative matters, running coaching and player clinics, and disciplinary matters. Clubs must be member clubs to participate in competitions. There are eight different gender and age groups – senior men, senior women, college men, college women, high school boys, high school girls, youth, and old boys/girls.

There are 310 clubs representing over 17,000 players in the PRU. The single biggest issue that the PRU contends with is access to fields. The majority of the clubs are located in the Ellicott City and Baltimore area. In Prince George's County there is only one club with one men's team comprised of approximately 20 players. Montgomery County has a more robust club program with six teams.



The college teams do not need access to off-campus fields as they have access to on-campus fields as well as university support financially. The critical shortage of fields is for youth, men's, and women's clubs for practices as well as tournaments. Individual clubs organize their own tournaments generally hosting one to two per year on a low range and three to four per year on a high range. The PRU promotes its own U19 High School Tournament annually.

PRU clubs currently use three to four lighted fields in Montgomery County for weeknight practices. Both the men's and women's teams practice two nights per week for a total usage of four weekday nights. Games are played on Saturdays in September through November with as many as 50 matches being played each weekend by PRU member club teams. Seasonal playoffs are played in March through April. There is a robust summer Seven's league that is played for three months.

PRU officials indicated that there is great demand for quality and guaranteed field space for both practices and games. A possible three fields could be used on weeknights for practices and three fields for Saturday games. Saturday usage would be envisioned to host four games that would begin at 10:00am and finish at 5:00pm. Usage would be 10-15 weekends in the summer, every weekend in September through November, and every weekend March through April.

### Cricket

#### *United States of America Cricket Association*

The United States of America Cricket Association (USACA) is the governing body for the sport of cricket in the US. It is a member of the international governing body International Cricket Council (ICC). There are approximately 50,000 cricket players in the United States. There are eight regions in the USACA with Maryland being part of the Atlantic Region along with New Jersey, DC, and Delaware.

The United States of America Cricket Association (USACA) has partnered with New Zealand Cricket to form a joint venture Cricket Holdings America (CHA) to begin a professional Twenty20 Cricket League. The Twenty20 (T20) format of cricket is played over the course of three hours and is the fastest growing format of cricket globally. The CHA has retained two consultants to help them identify eight cities for franchises.

Factors for determining franchise cities include financial support from private, public, non-profit, and philanthropic sources, support from governmental officials, local fan support, and stadiums that can accommodate 5,000 to 10,000 spectators that have corporate, media, and broadcast amenities. The construction of new, cricket-specific stadiums is ideal but temporary stadiums will be accommodated.

The only ICC-sanctioned cricket facility in the US is located in Ft. Lauderdale in Broward County, Florida.



### *United States Youth Cricket Association*

The United States Youth Cricket Association (USYCA) provides free cricket equipment and training to public schools for use in their physical education classes. The USYCA is a 501(c)3 that is funded through private donations. There are 800 schools that have received free equipment and been provided training. There is a pilot program in the Bowie school system at Whitehall Elementary School.

### *Washington Cricket League*

The Washington Cricket League (WCL) was formed in 1974 and currently has 2,500 registered players with 1,500 of them being active players. The WCL currently plays on 13 elementary school fields around Washington, D.C. and Maryland.

The WCL plays their season from early April through September with games being held every weekend. There are approximately 6 teams in the Bowie area as part of the 36 team WCL. Each team carries between 15 and 20 players with 11 players competing on the field at one time.

WCL member teams participate in regular season games, WCL Championships, and the WCL All-Star Game. The WCL would be very interested in a minimum of two playing fields with three fields being ideal for weekend game play. Four games, if a Twenty20 format, would be played per field on a weekend day over the course of 12 hours. If the game is a Forty-Over format then two games would be played with an average game time of seven hours. A total of 16 playoff games are held in two divisions and there are two Championships, one each in each of the two divisions. Additionally, teams practice one to two times per week.

The average spectator attendance at weekend regular season games is approximately 200 to 300 people according to WCL officials. Spectator attendance at playoff games is 500 people per game and the finals typically attract 1,500 spectators.

For tournaments, the WCL has used Adelphi Park in Washington D.C. but the fields are not high quality fields. The finals have been played in Hyattsville, Maryland at Chillum Community Park.

### *Washington Metro Cricket Board*

The Washington Metro Cricket Board (WMCB) has 18 teams and approximately 400 members. The WMCB plays their season from April through October. Each team plays 20-24 games over the course of the season. Games are played on Saturdays and Sundays with practices during the week. The WMCB club teams practice and play games at the Glass Manor Elementary School in Oxen Mills, at Pimlico, and at a location in Virginia. Access to practice and game fields is a constant challenge for the WMCB.

Cricket can be played on an artificial surface field. WMCB officials indicated that they would be interested in their teams having access to the proposed complex for both practices and games. If a cricket-specific stadium were constructed it would be only the second one in the U.S. with the only one currently located in Lauderhill, Florida.

## Other Sports

### *Washington Area Frisbee Club*

The Washington Area Frisbee Club (WAFC) has 2,800 members and is focused on promoting flying disc sports in the Washington, D.C. Metropolitan Area. The WAFC sponsors recreational leagues, tournaments, and educational demonstrations. WAFC has teams at all levels and age groups including middle school, high school, college, and adult teams. The league plays year-round and promotes three major tournaments annually.

Currently, the WAFC plays on National Park Service open land, at high schools in Arlington County and Washington, D.C., and in Montgomery County at elementary and middle schools. Their top priority for booking fields/green space is the ability to be permitted and have a guaranteed slot. Disc clubs can play on artificial turf and officials indicated that they prefer it due to the ability to complete games/tournaments during inclement weather situations.

WAFC hosts three major tournaments annually: Fools Fest; Chesapeake Open; and Chesapeake Invitational. Fools Fest plays at Pratt Park in Fredericksburg, Virginia while the Chesapeake Open and Chesapeake Invitational both utilize the Capitol Polo Grounds in Poolesville, Montgomery County, Maryland. All three tournaments use nine soccer-sized fields which is the equivalent of 18 flying disc fields.

WAFC officials indicated that their members would not be able to practice or play league games in Bowie due to travel times for their members. They indicated that there is a possible opportunity to move one or more of their tournaments to the proposed athletic fields. The appeal is the artificial surface, lighting, and the ability to have guaranteed fields with up-to-date amenities.

To support WAFC tournaments, a site would need to be able to host beer gardens as flying disc tournaments are a social event. In addition, bathrooms, concessions, access to water, an area to sell merchandise, access to cones, and fields lined for their sport are also necessary for these tournaments.

### *USA Ultimate*

USA Ultimate is the national governing body for what is known as Ultimate Frisbee™ or the sport of flying discs. USA Ultimate currently has 40,000 members in the divisions of youth, college, and adult. Membership in 2004 was at 19,234 representing a growth of over 50% in the past nine years. The greatest area of growth in recent years has been in the youth and college divisions. The East Coast, particularly the Metro D.C. and Maryland area, represents a large density of USA Ultimate's members.

USA Ultimate hosts championships in Division I College, Division III College, High School Regionals, High School States, US Open, Youth Club, Grand Masters and Women's Masters, and Adult Club. USA Ultimate officials indicated strong interest in bringing tournaments to the stadium and field complex. Eleven fields are needed to host these three tournaments and would need to be a consideration. If there were 11 fields as well as the stadium, artificial turf, and lighting there is strong interest due to the popularity of the sport in the Maryland / Metro D.C. area.

Fields must be football sized fields to accommodate USA Ultimate national and international events. This differs from local clubs that can fit two playing fields into one soccer sized field. A 7,500-seat stadium would be ideal for hosting “showcase games” throughout the tournaments. USA Ultimate events are bid on by local clubs and their communities and awarded by the national governing body.

The three tournaments cited include the US Open which is an elite-level, international tournament that brings in 24 teams and 700 athletes over the July 4<sup>th</sup> weekend. There is a collegiate championship held annually over the Memorial Day weekend with coverage on CBS Television. The Youth Nationals are held in August annually.

### Other Potential Uses

#### *Concert Promoters*

The Maryland and Metro D.C. area has many quality venues for hosting concert activity. The Jiffy Lube Amphitheater in Bristow, Virginia, Verizon Center in D.C., Merriweather Post Pavilion in Columbia, Maryland, and the 1<sup>st</sup> Mariner Arena in Baltimore were all cited as turnkey venues able to easily accommodate a touring concert.

While concert promoters could not rule out hosting an occasional concert at the stadium every few years, they indicated that regular concert activity at the proposed MLL stadium would be unlikely. Two primary reasons were stated for the unlikelihood of concerts playing the proposed stadium. First, Maryland charges an admissions and amusement tax that is not imposed in Virginia or Washington, D.C. which makes the financial deal for the promoter and the artist more challenging. Second, stadiums are generally not turnkey. As such, the associated costs for surface coverings, stage rental and set-up, and seat rental set-up makes it cost prohibitive. With 22,000 seats, the venue does not provide the upside potential to balance out the production costs.

#### *World Wrestling Entertainment*

World Wrestling Entertainment (WWE) is one of the largest family show entertainment companies globally. WWE holds virtually all of their shows indoors but they host their annual Wrestlemania event in outdoor stadiums. In recent years, WWE plays their Wrestlemania events at NFL stadiums. WWE officials indicated that they would consider an outdoor play in the proposed MLL stadium but that a 22,000 capacity is too small for their current outdoor needs.

#### *Feld Motor Sports*

Feld Motor Sports is one of the largest promoters of motorsports in the United States. Properties that they own include AMA Supercross, Freestyle Motocross, and Monster Jam. They currently play M&T Bank Stadium and 1<sup>st</sup> Mariner Arena in Baltimore and Verizon Wireless Arena in DC. For their AMA Supercross property the proposed 22,000 seat stadium is too small with the average venue capacity that they currently play being 50,000 seats. For Monster Jam, Feld officials indicated that a play in Bowie would dilute the attendance at their Baltimore and DC shows, affect their long-standing venue relationships, and if they are going outdoors with a weather risk they need upside potential with a larger capacity. They do not currently see their shows playing in the proposed MLL stadium.

### Summary of Input from Potential Demand Generators

The following table summarizes the relative level of interest expressed by potential demand generators for the proposed new MLL stadium and multi-field sports complex which was used to develop estimates of usage for sports-related activities.

Summary of Input from Potential Users		
Potential User Category	Proposed MLL Stadium	Proposed Multi-Field Sports Complex
Chesapeake Bayhawks	High	High
Dave Cottle Tournaments	High	High
USA Rugby	High	High
US Lacrosse	Moderate	High
NCAA	Moderate	Moderate
Atlantic Coast Conference	Moderate	Moderate
National Junior College Athletic Assoc.	Moderate	Moderate
Prince George's County Public Schools	Moderate	High
MPSSAA	Moderate	Moderate
MIAA	Low	Low
IAAM	Low	Low
Prince George's Community College	Low	High
Bowie State University	Low	Low
Elite Tournaments	Low	High
Aloha Tournaments	Low	Moderate
Hogan Lacrosse	Low	High
MSYSA	Moderate	Moderate
Freesate Soccer Alliance	Low	High
US Club Soccer	Low	Moderate
US Youth Soccer	Low	Low
Washington Area Frisbee Club	Low	Moderate
USA Ultimate	Low	Moderate
Bowie Boys and Girls Club	Low	High
Annapolis Hawks Lacrosse Club	Low	High
Maryland Winter League	Low	High
USA Cricket Association	Low	Low
Washington Cricket League	Low	High
Washington Metro Cricket Board	Low	High
Potomac Rugby Union	Low	High
Family Show National Tours	Low	Low
Concert Promoters	Low	Low

Note: Rugby and Cricket fields would need to be specifically designed to accommodate these sports.

Other than to serve as the home of the MLL Bayhawks, market research suggests relatively limited demand for the proposed new 22,000-seat MLL stadium. The ability to consistently attract other sports and entertainment activity requiring that size stadium appears challenging. In addition, no MLL team currently plays in a lacrosse-specific stadium.

By contrast, there appears to be strong market demand for the proposed multi-field sports complex, particularly given the lack of a comparable complex in the County and the relatively limited date and space availability at other existing venues in Maryland. The proposed multi-field sports complex could serve a diverse set of demand generators including various levels of competitions/tournaments for multiple sports. Market research suggests that the complex should include a minimum of 12 fields with the potential to expand up to 16 to 18 fields in order to maximize long-term marketability. Based on input from potential demand generators, the following summarizes programmatic and operational factors considered to be important when selecting a site location:

- Developing a mission statement and booking priority system
- Offering a critical mass of fields at the same location
- Providing lighted fields with an artificial surface provides opportunities for use irrespective of weather
- Maintaining fields at a tournament-level quality
- Providing patron amenities including quality restrooms, concessions stands, and Wi-Fi service
- Providing a secured perimeter that only allows ticketed spectators at designated fields
- Providing ample on-site parking and appropriate parking management to accommodate heavy tournament traffic and flow
- Ability to create on-field lines for their specific sport
- Having the on-site equipment to accommodate daily usage and tournament needs – e.g., moveable soccer goals, netting behind goals for lacrosse, flags and cones, etc.
- Providing appropriate on-site storage for equipment
- Providing locker rooms for teams and officials and office space for tournament coordinators
- Planning for open space for team gathering areas and warm-ups for tournament participants
- Utilizing a professional management team
- Community support of events including the business community, hotel and restaurant industry, and area governmental officials

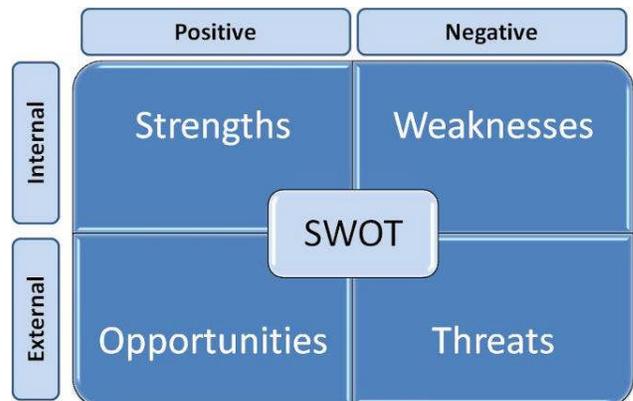
These elements should be evaluated as part of any potential development strategy in order to maximize marketability.

## Summary of Market Findings

### SWOT Analysis

A SWOT analysis outlines the key internal and external factors, both positive and negative, impacting a project or concept.

Given these success factors as well as the primary and secondary research conducted for this analysis, the following graphic summarizes market-related strengths, weaknesses, opportunities and threats associated with the proposed new MLL stadium/multi-field sports complex.



## SWOT ANALYSIS

### Strengths

- Strong tradition of lacrosse in the State and region
- Population base, age and income attributes of Baltimore-Washington Metro areas
- Geographic location within the region
- County-owned land may reduce project costs
- Existing Bayhawks fan base in the Baltimore-Washington Metro area
- MLL is generally an affluent fan base
- Local team ownership that has connections/relationships at all levels of lacrosse
- Accessibility and affordability of the destination
- Proximity to restaurants
- Established State marketing agencies

### Weaknesses

- Proposed seating capacity for the lacrosse stadium relative to potential market demand
- Traffic considerations
- Limited parking
- Lack of proximate hotels to accommodate larger events
- Field surface needs vary among user groups
- Many events at the proposed lacrosse stadium represent a transfer of existing activity already occurring in the State generating minimal incremental new economic and fiscal impacts
- Lacrosse stadium will only be used a limited number of times throughout the year
- Limited entertainment options within the immediate area

### Opportunities

- Lacrosse is one of the fastest growing sports in the U.S. at all levels
- Youth sports have historically fared well during economic downturns
- Ability to develop and expand existing youth sports programs currently playing elsewhere
- Providing a critical mass of lighted fields at a single location with artificial playing surface is considered extremely marketable by multiple sports at various levels
- Potential demand generators expressed interest in hosting events at multi-field sports complex
- Multi-field sports complex would provide first-class space for all levels of local youth/amateur athletics to grow and prosper
- Fosters a sense of community identity, spirit, pride, and culture
- Ability to create a sport destination
- Media coverage generated from hosting larger tournaments
- Potential incremental new economic and fiscal impacts to the County and State from the multi-field sports complex
- May lead to more immediate development of hotels in Bowie and Prince George's County

### Threats

- Long-term stability of MLL
- Potential operating deficit depending on operating/business model
- Tournament promoters typically retain the bulk of event revenues
- Amount of useable acreage relative to requirements for desired field location and configuration
- Competition from area professional sports teams such as the Baysox which have overlapping seasons
- Experienced management must be in place for effective programming
- Successful integration of lacrosse complex with other elements of the regional park
- Expectations/priorities may conflict between residents and other users
- Marketability may be hindered by the admissions/amusement taxes in Maryland
- Maintaining 'tournament' quality of facility when using it for recreational, instructional, and competitive uses
- Established competitive sports/entertainment facilities in the Baltimore-Washington metro area

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## Comparable Facilities Analysis

Analyzing comparable facilities can offer a frame of reference as to what the proposed new MLL stadium/multi-field sports complex in Prince George’s County may be able to attract in terms of number of events and attendance. Crossroads compiled and analyzed data on comparable facilities relative to ownership/management structure, building program elements, event activity and other operating strategies. Although not all facilities profiled in this section are directly comparable to either the proposed new MLL stadium or the multi-field sports complex, they can still offer a frame of reference in some areas of operation. This section summarizes the building program elements, primary uses and general operating characteristics for these profiled stadiums based on data obtained from direct interviews with management as well as secondary sources.

### MLL Stadiums

#### Overview of MLL Stadiums

The following table profiles the owners and operators for the stadiums that currently host MLL teams. Five of the eight MLL stadiums (63%) are owned and operated by universities. Two facilities are city-owned and one is owned by a stadium district. Seven of the eight stadiums are privately managed and have artificial surface fields. American Legion Memorial Stadium in Charlotte is managed by a public entity and offers natural grass. Seating capacities vary significantly from a low of 6,000 on a Canadian university campus to a high of 76,000 in an American NFL stadium.

Owner/Operator of MLL Stadiums					
Team	Stadium	Capacity	Playing Surface	Owner	Operator
Boston Cannons	Harvard Stadium	30,323	FieldTurf	Harvard University	Harvard University
Charlotte Hounds	American Legion Memorial Stadium	24,000	Natural Grass	City of Charlotte	Mecklenburg Park & Recreation
Chesapeake Bayhawks	Navy-Marine Corps Memorial Stadium	34,000	FieldTurf	U.S. Naval Academy	U.S. Naval Academy
Denver Outlaws	Sports Authority Field at Mile High	76,125	GrassMaster	Denver Metropolitan Football Stadium District	Stadium Management Company
Hamilton Nationals	Ron Joyce Stadium	6,000	Artificial Turf	McMaster University	McMaster University
Long Island Lizards	James M. Shuart Stadium	13,000	FieldTurf	Hofstra University	Hofstra University
Ohio Machine	Selby Stadium	9,100	OmniGrass	Ohio Wesleyan University	Ohio Wesleyan University
Rochester Rattlers	Sahlen's Stadium	13,768	FieldTurf	City of Rochester	Rochester Soccer Corp.

Source: Individual facilities; secondary research.

#### Profile of MLL Stadiums



*Harvard Stadium – Boston, Massachusetts*

The Boston Cannons have played their games at Harvard Stadium since 2007. The Boston Cannons previously played at Cawley Memorial Stadium in Lowell and Boston University’s Nickerson Field. The stadium is owned and operated by Harvard University. Built in 1903, Harvard Stadium is the oldest stadium in the country and is home to Harvard University football as well as men’s and women’s lacrosse. The stadium was originally constructed for \$310,000 but has undergone extensive remodels over the years, most recently adding artificial turf, permanent lighting, and a removable all-weather bubble. Harvard Stadium has a seating capacity of 30,323 in its horseshoe design. The facility offers parking on adjacent fields and lots and is accessible via public transportation.



*American Legion Memorial Stadium – Charlotte, North Carolina*

The Charlotte Hounds play at the 24,000-seat American Legion Memorial Stadium. The stadium was constructed in 1936 with federal and city money. Owned by the City of Charlotte and operated by the Mecklenburg Parks and Recreation Department, the stadium has a natural grass playing surface. It has hosted collegiate football, high school soccer, football, rugby, and lacrosse, band competitions, and concerts since its opening. From 1937 to 2000, the facility hosted the Shrine Bowl which is a match-up between the top high school football players in North Carolina and South Carolina.



*Navy-Marine Corps Memorial Stadium – Annapolis, Maryland*

The Chesapeake Bayhawks play at the 34,000-seat Navy-Marine Corps Memorial Stadium on the campus of the U.S. Naval Academy. The stadium opened in 1959 and is owned and operated by the U.S. Naval Academy. The original construction cost of \$3 million was raised through private donations. The stadium underwent a \$40 million renovation which was completed in 2004. The stadium has an artificial playing surface, two video scoreboards, luxury suites, a banquet facility, an area for party tents, and media spaces. The stadium is home to the Naval Academy's football and lacrosse programs. The stadium has also hosted the NCAA Women's Lacrosse Championship, the Women's Lacrosse World Cup, and the Good Samaritan High School All-Star Football game.

Prior to moving to the Navy-Marine Corps Memorial Stadium, the Bayhawks previously played at Homewood Field on the campus of Johns Hopkins University, M&T Bank Stadium, and Johnny Unitas Stadium on the campus of Towson University.



*Sports Authority Field at Mile High – Denver, Colorado*

The Denver Outlaws play at Sports Authority Field at Mile High which is also home to the National Football League's Denver Broncos. The stadium is owned by the Denver Metropolitan Football Stadium District and operated by Stadium Management Company, LLC, a subsidiary of the Denver Broncos Football Club.

Sports Authority Field at Mile High was constructed for \$400.7 million in 2001. In 2005, the stadium hosted MLL's 2005 All-Star Game. The stadium has also hosted college football, high school football state championships, marching band competitions, the 2008 Democratic National Convention, and various concerts including U2 and Metallica. The facility briefly served as the home of the MLS Colorado Rapids.



*Ron Joyce Stadium – Hamilton, Ontario*

The Hamilton Nationals play at Les Prince Field at Ron Joyce Stadium. The 6,000-seat stadium is located on the campus of McMaster University which owns and operates the facility. Opened in 2006, the facility's construction cost was US \$42 million. The stadium can expand its capacity to 12,000 with temporary seating. Parking is located below the stadium grounds. The facility features a press box, television and radio broadcasts facilities, multi-purpose rooms and locker rooms. The playing surface is artificial turf. The stadium is home to the McMaster University football, soccer, and rugby as well as the host for local elementary and high school teams. The Hamilton Tiger-Cats of the Canadian Football League utilize the stadium for spring and summer training.



*James M. Shuart Stadium – Hempstead, New York*

In 2012, the Long Island Lizards played their home games at the James M. Shuart Stadium on the campus of Hofstra University. During their first season of play in 2001, the Lizards played at both Shuart Stadium and Citibank Park (previously EAB Park). In 2002, the team played at Shuart Stadium (previously Hofstra Stadium) before it moved to the Mitchel Athletic Complex from 2003 to 2008. From 2009 to 2011, the team played at Shuart Stadium with some games at Stony Brook University.

Hofstra University owns and operates the 13,000-seat stadium which has an artificial turf playing surface. The facility is home to Hofstra University's football and lacrosse programs. Originally constructed in 1963, the stadium underwent a major renovation in 1996 which included new lighting, an Athletic Department office building, a press level and club suite level, two entrance plazas, a new facade and pavilion, concession and souvenir areas, locker rooms, and scoreboard.

Shuart Stadium has hosted NCAA Division I Men's Lacrosse Quarterfinals, NCAA Women's Lacrosse Championship first rounds, Long Island All-Star Football Game, Long Island high school and New York state championships games, and served as home for the Long Island Rough Riders of professional soccer's A-League.



*Selby Stadium – Delaware, Ohio*

The Ohio Machine plays their games at the 9,100-seat Selby Stadium which is located on the campus of Ohio Wesleyan University. Originally constructed in 1929 at a cost of \$160,000, Selby Stadium has undergone extensive renovations including the installation of artificial turf, lighting, two-level press box, refurbished locker rooms, video board, and sound system. The stadium is owned and operated by Ohio Wesleyan University.

Selby Stadium is the fourth-largest, college-owned stadium in NCAA Division III and features a track that surrounds the field. It is home of Ohio Wesleyan's football, men's and women's track & field, men's and women's lacrosse, and field hockey programs.



*Sahlen's Stadium – Rochester, New York*

The Rochester Rattlers play at Sahlen's Stadium in Rochester, New York. Opened in 2006, the stadium has a seating capacity of 13,768. The facility's construction cost was \$35 million which was jointly funded by the State of New York, the City of Rochester, and USL Pro League Soccer's Rochester Rhinos' ownership.

The stadium was originally constructed as a soccer-specific stadium to accommodate the Rochester Rhinos. The stadium's name has had multiple naming rights agreements since opening including PAETEC Park, Rochester Rhinos Stadium, Marina Auto Stadium, and its current name of Sahlen's Stadium.

Since joining the MLL in 2001, the Rattlers have played at Frontier Field and Bishop Kearney Field before moving to this stadium in 2006 when it opened. Sahlen's Stadium is home to the Rochester Rhinos of USL Pro League Soccer and Western New York Flash of the Women's Premier Soccer League and hosts other events such as concerts.

## Comparable Multi-Field Sports Complexes

The following profile comparable complexes to that proposed in Prince George's County.



*Mesa Soccer Complex – Greer, South Carolina*

Located in Greer, South Carolina, the Mesa Soccer Complex has 16 multi-purpose, rectangular fields, playgrounds, restrooms, concession areas, a picnic shelter, and parking for 1,250 cars. The complex originally opened in 1995 with 10 fields that were developed and owned by an area soccer club program. In 2007, the Greenville County Recreational District (GCRD) developed adjacent land and added six additional fields to the complex. The Carolina Elite Soccer Academy (CESA) currently owns the original ten fields while the GCRD owns the other six fields. The complex is maintained by the GCRD and operated by CESA, with input from the GCRD.

All 16 fields are lighted and have a Bermuda, natural grass playing surface. The six fields developed by the GCRD were opened in 2007 and funded by a hospitality tax. The construction cost for the development of the fields, field lighting, additional parking, additional bathroom and concessions area, and a playground was \$3.5 million.

CESA is the largest soccer club in the area with over 4,000 participants. CESA has four full-time staff that manages the soccer operations of the club, schedules the fields, and oversees a minimum of four tournaments per year. The GCRD is a special purpose district within Greenville County that was created in 1967 and owns and maintains 55 parks in the County that accounts for over 800 square miles. GCRD officials indicated that CESA has a professional model that serves the citizens of the County and that CESA are experts at running tournaments while the GCRD are experts on maintaining parks and recreation facilities.

In 2006, Greenville County created the Tourism, Recreation, and Athletics Coalition (TRAC) to drive tourism into the county. The 20-year hospitality tax of 2% on every \$1.00 spent on prepared food was funneled specifically into park creation or renovations with every dollar spent needing to support an aspect of sports tourism. In 2007, the GCRD created a full-time position of a sports tourism professional that works closely with CESA and the local area convention and visitors bureau. The GCRD, with 90 full-time employees, also manages and maintains water parks, an ice rink, camp and retreat center, and an equestrian park.

CESA promotes four annual soccer tournaments and one regional tournament approximately every two years. These tournaments are large economic drivers for the county and support the TRAC strategic plan. In 2011, the four tournaments brought in 975 teams, 16,589 players, and total estimated visitors of 66,356, approximately 39% of which were from outside the County.

Primary usage of the fields includes CESA league season play, premier level training, and camps during the Spring and Fall. CESA hosts two of their tournaments in the Spring and two in the Fall. Each of the tournaments requires the use of additional fields as 25+ total fields are utilized. The fields are put into rotational use from June through early September to rest the natural grass and allow it to repair and grow. From November to February the fields are not played on while the grass is dormant.

GCRD officials indicated that the complex has not been able to host a few tournaments due to a lack of a 3-4,000 capacity stadium field. The Mesa Complex does not offer seating at any of the fields and they are considering the construction of spectator seating at some of the fields. Officials also indicated that they will be constructing shade shelters in the near future. The GCRD has considered converting some of the fields to artificial surface but the cost has been prohibitive and they are continuing to evaluate this option.



*Georgia Soccer Park – East Point, Georgia*

The Georgia Soccer Park (GSP) opened in 2006 with five natural grass fields and added a sixth grass field in 2009. The GSP is owned and operated by the Georgia Soccer Development Foundation (GSDF), a non-profit organization. The GSDF's goal is to become a 16-field complex that includes permanent restrooms and concession operations, a study hall / office building, and a small capacity stadium.

The park was developed after a 10 year campaign by the Foundation and its founding partners. The original five-field complex was constructed at a cost of \$2.5 million. In 2009, the addition of the sixth field and more parking was completed at a total cost of \$250,000. The Georgia State Soccer Association (GSSA) and the Concorde Fire Soccer Club were integral partners in acquiring and developing the land. The GSSA helped to fund a portion of the land acquisition with funds it had from the successful 1996 Olympic Games.

The GSP has three program partners that paid an upfront \$250,000 fee to have priority booking on the fields but also are responsible for any operating shortfalls. The Concorde Fire Soccer Club has a 60% program partner interest and the Atlanta Flying Disc Club and Atlanta District Amateur Soccer League both have a 20% interest. The sixth field was added with the investment by the Flying Disc Club. Upon full payment by the Atlanta District Amateur Soccer League the GSP is looking to add another field.

The park is open by reservation only and pick-up play is not allowed. Other tenant users of the GSP include: Soccer in the Streets; Liga de el Sueno; The Luke Project Sports; USA Ultimate; Clan Na NGael Gaelic Football; America Scores/Atlanta; and Woodward Academy Athletics.

Peak usage of the complex is on weekends with tournaments and Sunday league play by Liga de el Sueno who use four fields approximately 50 weeks of the year. From May through mid-August, the Disc Club uses all fields for several hours on weekdays and hosts five tournaments during the summer months. Ultimate disc frisbee can be played on half the size of an international soccer field layout thus turning the GSP's six fields into 12 for play. Concorde Soccer stages five tournaments annually and

uses the fields heavily from September through April. The GSP is also one of the field complexes used for the Georgia State Soccer Atlanta Cup.

According to GSP officials, the park is scheduled to host 37 weekend tournaments in addition to weekly league and after-school programs in 2012. The facility averages 100,000 users annually. On average, 2,000 to 4,000 people utilize the park on a weekly basis which sometimes reaches a weekly usage rate of 7,000. The GSP is a ten-minute drive from the Atlanta Airport allowing easy travel for national tournaments and access to hotels.

The GSP has one full-time employee as well as one full-time contract labor position and one part-time maintenance position. Fundraising is a major priority of the GSDF to build out the remainder of the complex. The park does not have permanent restrooms, concessions, or shelters for protection from lighting and inclement weather. Shelters are important for the complex to be able to host summer camps.



*Kirkwood Soccer Complex – New Castle, Delaware*

The Kirkwood Soccer Complex is a 15-field and indoor soccer complex that originally opened in 1992. The land is owned by the County of New Castle and is leased to the Kirkwood Soccer Club. The complex is home to the 3,000 member, 130 team Kirkwood Soccer Club, high school soccer, collegiate soccer, tournaments, camps, and clinics.

The Kirkwood Soccer Club is in year 10 of a 50-year lease with the County to operate and maintain the complex and the agreement calls for a \$1.00 per year lease payment. The development of the original fields and the indoor field arena was the responsibility of the Kirkwood Soccer Club and was achieved through US Soccer Federation grants and private fundraising. The project cost was \$750,000. In 2005, the complex added its 15<sup>th</sup> field, an artificial surface field, and paved the parking lots at a cost of \$600,000.

Of the 15 fields at the complex, one is artificial surface, three Bermuda grass, and 11 fescue grass. The combination of an artificial surface field and the two different types of natural grass fields allows the complex to maximize usage while maintaining quality fields for soccer play. The complex does not play on its natural grass fields from December to April and there is scheduled and consistent reseeding and maintenance on the grass fields. The artificial surface field is maintained on a weekly basis. The complex does host a girls' lacrosse tournament but has not booked a boys' lacrosse tournament due to the potential of extensive wear and tear.

Although none of the fields have permanent lighting, portable lighting is brought in to light the artificial surface field during the Fall, Winter, and Spring. The 10,000 square foot field arena houses an indoor playing surface, offices, small bleachers, snack bar, and restrooms.

Through its arrangement with the County, the complex is the home to county soccer leagues after club practices have finished on the outdoor fields and grants right to the county for the use of the indoor arena. It hosts six high schools soccer game day activities with eight games being played, per team, over the course of 10 weeks in the Fall (boys) and the Spring (girls).

Wilmington University utilized the complex through 2011 as their practice and game day facility for women's lacrosse and men's and women's soccer programs. Wilmington University is constructing their own fields for their programs and will begin play this Fall. It is anticipated that the men's and women's soccer programs from Delaware Technical College will use the complex for its practices and games.

The Kirkwood Soccer Club has approximately 30 of their teams training at the complex weekly. Peak usage for the fields is 4:00pm – 7:00pm on weeknights.

On average, eight tournaments are hosted annually with four promoted by the Kirkwood Soccer Club and four being outside rentals by independent tournament promoters. The soccer club recently contracted with private tournament promoters to host their four tournaments. Previously the complex staff hosted the tournaments themselves. The four tournaments that the soccer club promotes average 120 teams with 60% of the teams being from out-of-state. As these are youth tournaments the age range is 9-18 years old. Two of the tournaments are boys' tournaments and two are girls' tournaments. The economic impact of these tournaments to the County is estimated at \$3.5 million annually. In 2013, the complex is hosting a national level US Youth Soccer event for five days and 7,000 room nights have been booked which will generate significant economic impact.

Five full-time employees manage all aspects of both the complex and the soccer club including an executive director, office manager, director of coaching and two groundskeepers. Four part-time grounds crew staff are hired on a seasonal basis. The concession stand and other services are mainly staffed by volunteers.

The Soccer Club is a non-profit, 501(c) 3 organization. The complex runs with an approximate budget of \$1 million annually. As a non-profit organization the management is focused on break-even operations and achieves that on a regular basis. Approximately one-third of their operating budget comes from tournament fees/rentals. The main expenses to their budget are liability insurance and workman's compensation.



*Manchester Meadows – Rock Hill, South Carolina*

Manchester Meadows is an eight-field complex with six natural grass fields and two synthetic surface fields that opened in 2006. All eight fields are lighted and the synthetic fields each have seating for 750. Located on 70-acres the complex also has open park land, walking trails, playground, two pavilions, and a building with offices, restrooms, concessions, and a 150-person capacity meeting room. There are 720 on-site parking spaces. The complex is owned and operated by the City of Rock Hill.



The complex was constructed on land that had been a waste water treatment facility. The facility closed over 20 years ago and the land was dormant. The City of Rock Hill paid \$13.5 million to develop the eight fields and additional access roads. The contributions towards construction costs were broken down as follows: 5% from a federal grant; 1% from a state grant; 1% from the City accommodation tax; \$100,000 from the City's general fund; and the remainder was bonded through utilizing 10% of a 2% hospitality tax on prepared food in the City.

There are seven full-time staff dedicated to the management of Manchester Meadows including a park supervisor, an office administrator and five maintenance/custodial staff. There are three part-time equivalent positions that are handled by six individuals allowing for evening and weekend coverage for trash removal, moving goals, general field maintenance, and custodial. Additionally, there are two sports programmers that work with Manchester Meadows as well as other City recreation facilities.

The complex has a directive by the City that requires the operation to have tourism as part of its booking policy. The City made sports tourism a priority over 20 years ago and also owns and operates a recently-opened velodrome, additional multi-field parks, and baseball/softball parks. What is traditionally called a "Parks and Recreation" department in many municipalities is called "Parks, Recreation & Tourism" in Rock Hill.

The complex has an approximate budget of \$500,000 for expenses and \$100,000 in revenue. Based on the emphasis on tourism the complex is expected to show its economic impact which was most recently calculated at \$8.5 million in direct economic impact. In 2011, there were 265,720 users of the complex with approximately 135,415, or 51%, coming from outside of York County.

Booking priorities are as follows for Manchester Meadows: 1) City of Rock Hill youth programs; 2) tournaments that drive economic activity to the City; and 3) Discoveries Soccer Club related activities.

The City struck a partner agreement with the Discoveries Soccer Club. The Club receives one field per night during the week, is not charged for lights, receives two free weekends annually to promote tournaments, there is no charge for use of the conference room or pavilions for meetings, and is not charged for hosting camps. The Club pays \$11,000 per year annually but also pays all bid fees for tournaments.

This was a strategic alliance to meet the goal of providing economic impact generating sports tourism to the City. As only member clubs or state associations can host a US Youth Soccer tournament, this allows the facility to attract the business through the Discoveries Soccer Club's bids. Manchester Meadows hosted the 2012 US Youth Soccer National Championships. Discoveries paid \$15,000 in bid fees for the tournament.

Rock Hill, South Carolina is located 20 miles south of Charlotte, North Carolina and Manchester Meadows is located near a major shopping mall and hotels. According to Manchester Meadows officials, during the economic downturn from 2008-2010, two new hotels were built in Rock Hill in large part due to the business generated by the multi-field sports complex.

Field and scoreboard sponsorships are sold through the City with four grass fields having sponsors and both synthetic surface field scoreboards being sponsored by Coca-Cola. The Coca-Cola scoreboard agreement is worth \$150,000 over ten years to the complex and the four field sponsors are worth \$40,000 over five years. The rental of the pavilion is a strong revenue stream for the complex with 28 rentals of the 150-person capacity Lake Pavilion in 22 available days in June 2012. Concessions are run by a Parks, Recreation & Tourism concession manager that is responsible for Manchester Meadows and all the other City parks and facilities. This is a small revenue stream for the complex.

The six grass fields are completely shut down for use from mid-December through February 1<sup>st</sup> and limited use is allowed in the month of February. Full operations resume in March through November. There is heavy maintenance in June and July.

The City has league play and programs running from 5:00pm – 10:00pm Monday through Thursday on all eight fields from September through May, except during its shut down period from mid-December through February 1<sup>st</sup>. Generally, seven fields are used by the City and the eighth is used by Discoveries Soccer Club. Weekends are reserved for tournament play. Summers are active with Club activity, adult league two nights of the week, camps, and tournaments.



*Overland Park Soccer Complex – Overland Park, Kansas*

The Overland Park Soccer Complex (OPSC) opened in 2009 and is owned and operated by the City of Overland Park. The Complex offers 12 fields with each field having an artificial turf playing surface and lighted. The complex has a main tenant with the Blue Valley Soccer Club (BVSC) and hosts weekend tournaments, camps, and clinics primarily in soccer and lacrosse.

The City of Overland Park issued bonds to fund the construction of the 96-acre complex. Bonds were issued on a 20 year term for \$60 million and are being paid through a hotel tax increase of 3% and a portion of a State alcohol tax that is designated to the city and the city earmarked to this project. The soccer complex itself was a \$36 million project. The remaining dollars were designated to the construction of three golf holes for an adjacent golf facility that was affected by the soccer complex project. The soccer complex was constructed in three phases: 1) clearing the site and removing debris; 2) construction of the fields; and 3) the construction of on-site buildings including the “Fieldhouse” complex and concession/restrooms facilities. Each phase was approximately \$12 million each.

As the City studied the project during its planning stages City officials met with local area soccer clubs to gauge interest in the complex and to determine demand. During those conversations with community sports leaders the City sought partners that would guarantee booked field time. BVSC, the largest club in the Overland Park area, and the City negotiated an arrangement where BVSC had the rights to nine of the 12 fields for practices on weekdays from Monday through Thursday. Additionally, BVSC signed a 10 year lease agreement for office space in the Fieldhouse.



BVSC has approximately 140 teams in their Club system. BVSC recently merged with another local soccer club and BVSC negotiated with the Complex officials the rights to ten fields on Monday through Thursday for practice. The Club allocates the field usage and the complex staff is not engaged in that process.

The complex usage is broken down into two seasons with August-December 1st being the Fall season and March-June being the Spring season. The primary daily usage of the complex is from 4:30pm until 9:30pm. These are the hours that BVSC holds its team practices on Monday through Thursday. It is also the time that is heavily used due to school hours for youth and work hours for adults. Summer months not only have BVSC practice time but also camps and clinics. Peak months for usage include March through November. Months in less demand include December, January, and February.

The remaining two fields were marketed to other local area sports groups. The goal for the complex was to identify users that would be consistent in their rental of field space. When an organization made a commitment to the Fall season then they had the first right of refusal for the Spring season. The Heartland Soccer Association and BVSC are the two primary users of the complex.

The OPSC has two full-time complex staff members and 12 to 14 part-time staff. Full-time staff is responsible for all aspects of running the complex for the City including scheduling, field maintenance, and grounds maintenance, concessions operations, etc. Part-time staff covers evening and weekends responsibilities mostly focused on being the contact for organizations renting the Complex for anything Complex related. Additionally, there is one concessions Assistant Supervisor and four concessions attendants as well as cashiers and these positions are all part-time. Complex officials indicated that being owned and operated by the City offered two distinct advantages: 1) it allows the venue to stay neutral when booking fields and tournaments; and 2) the City is able to bring additional services to the Complex including snowplowing, irrigation system maintenance, and mowing of non-field surface grounds.

In 2012, the complex is anticipated to host 37 total weekend events of which 14 are Spring and Fall League play for the BVSC, two are ultimate Frisbee tournaments, and one is a lacrosse tournament. Total tournaments scheduled are 18 plus four Showcase events. BVSC League play would be bumped from scheduling if there were an interested tournament depending on the size of the tournament and hotel usage and the impact on local, community players. Complex officials cited this as being a fine line and heavily contemplated prior to bumping BVSC League play. Currently, they are not looking to bring in additional tournaments as the budget is viewed as acceptable and local play is important to City leaders.

In 2010 and 2011, the soccer complex averaged approximately \$1.2 million in total revenue and \$1.0 million in total expenses generating net revenue of approximately \$200,000. The complex budget is not responsible for bond debt.

In 2011, the complex hosted 21 tournaments and 14 weeks of Club league play. League play and tournament play brought over 825,000 players and spectators. When weeknight practices are included, the number rises to 950,000. Sixteen (16) of the 21 tournaments hosted in 2011 are held annually. Nine of these 16 tournaments are at capacity and utilize additional sites. Tournaments range in size from 130-300 teams with 25% to 35% of those participants staying in Overland Park hotels.

The original pro forma for the complex projected that operating costs would be funded by field rental and tournament fees which was achieved in 2010. The complex realized an increase in electrical costs in 2011 and although field rental fields did not cover operational expenses, this revenue stream combined with field house lease payments and concession revenues resulted in net revenue.

The warranty for the turf expires in 2017. Based on the need to cover increased operational costs and creating a capital fund for turf replacement, the complex staff expects to raise rental fee rates minimally.

The 16,000-SF field house houses the complex staff, BVSC operations, a company that specializes in strength and speed training for athletes, a referee's lounge with restrooms and showers for both men and women officials, tournament and referee offices, a lobby, and storage. There are three cafés/concession areas on-site that have free Wi-Fi and a video display system used to provide updates during tournaments.

Each field has an artificial turf playing surface and irrigation systems to balance the heat that can build up during high temperatures and maximize field usage during summer, prime daytime hours. The system is capable of reducing the playing surface temperatures by 20 degrees but it was indicated that the temperatures are still very hot and usage is scheduled around peak times of heat by field users. The fields are in three pods with concession and restroom facilities in each pod.

Eleven of the fields are 115 yards by 70 yards with The Championship field measuring 120 yards by 75 yards. Lighting has not been a complaint of local residents as the lighting system was designed to illuminate the playing surface and approximately a 6 foot radius around each field. Also, there is a high school and baseball field in the area that residents are accustomed to being adjacent to.

There is a bleacher system with three rows at each field accounting providing seating for 40 people at each field. The grandstand at the Championship Field seats 800. While a 5,000-seat stadium would allow them to market to events such as NAIA and Big 12 collegiate events, they do not anticipate utilizing such a facility on a regular basis. If needed, the complex would look to create a temporary stadium through temporary seating.

There are 1,100 parking spaces that are free-of-charge. Although it was suggested that the City design lots to accommodate 75 cars/field, officials chose to go with 95 cars/field as their guideline. Although the complex rarely has issues with parking, management indicated that 1,300 to 1,400 parking spaces would be ideal for larger tournaments and overlap between field usage.



*Reach 11 Sports Complex – Phoenix, Arizona*

The Reach 11 Sports Complex is the largest soccer complex of its kind in Arizona and is one of the largest in the western United States. It is the frequent home of national level soccer, field hockey, lacrosse, and rugby tournaments. The complex has 18 regulation soccer fields that are all lighted. The complex is operated by the City of Phoenix's Parks and Recreation Department and located on the federal government's Bureau of Reclamation land.



Reach 11 opened Phase I in 2007. Referred to as the East Section, Phase I included nine natural grass fields, one synthetic field, and 1,200 paved, lighted parking spaces. Phase I also included a restroom building, playground, shaded picnic area, and four baseball fields. The cost to build out Phase I was approximately \$12 million. Funding for Phase I construction was through Proposition 101 that was passed by voters in 1999. Proposition 101 was also referred to as the Phoenix Parks and Preserve Initiative and taxed one penny on every \$10 purchase within City limits. Over the 10 year life of Proposition 101 it created a fund of \$256 million.

Phase II, referred to as the West Section, opened in 2009 and includes eight natural grass fields, restroom building, concessions facility, and paved, lighted parking for 1,000 vehicles. The West Section was approximately \$10 million in construction costs and was paid for via the Parks Department Capital Improvement Plan.

The complex was created specifically as a tournament facility and not for practices by local soccer and sports clubs. If a practice is held when a tournament is not being staged it can only be booked onto the one synthetic surface field. Clubs, however, are encouraged to host their invitational tournaments at the complex.

Booking priority is based on a series of questions related to the event's economic impact potential to the City of Phoenix. Amongst those questions are: how many teams will be participating; how many hotel rooms are being utilized; how many fields will be used; and ability to sign a multi-year contract. The park manager collects this data when there are multiple requests for the same time period and the Parks and Recreation Director ultimately decides which event will be booked based on economic impact potential.

The Bureau of Reclamation has provisions on the land that the City and Reach 11 management must comply with. These provisions include not being able to charge for parking, there can be no fee to enter the complex, and permanent signage is not allowed. The complex can charge at their fenced synthetic surface field but anyone is allowed to stand outside the fence and watch the event. Tournaments are allowed to bring in their own temporary signage.

Reach 11 Sports Complex is managed with eight full-time employees and ten part-time staff including one park manager, one recreation coordinator, one grounds foreman, and five groundskeepers. The complex began with a staff of 13 full-time employees and 15 part-time staff in 2007 but significant reductions in city budgets required the elimination of staff in spite of increased event activity.

The complex has an annual budget of approximately \$1 million with annual revenue ranging from \$90,000 to \$120,000. Revenues are derived from tournament fees, vendor fees, youth reservations, and the four youth baseball fields. All revenues earned, as dictated by the Bureau of Reclamation, must go directly back into the Reach 11 Sports Complex via a special, reserved fund.

The complex has approximately one million users annually that resulted in an additional \$120 million in sales within the City of Phoenix boundaries and \$2.9 million in tax revenue to the City of Phoenix. Of those one million users approximately 80% are from out-of-State.

From September 2011 to May 2012, the complex hosted 30 tournaments. Complex officials indicated that 10 of their tournaments are major, national-level tournaments, 12-15 are regional tournaments, and the remainder are local.

The primary season is from September to May. With having natural grass fields there is downtime for the complex from early October to late November for over seeding and maintenance and the grass fields are completely closed during the June, July and August. If there is a major tournament opportunity, the complex will adjust its summer schedule to accommodate the event.

Reach 11 has secured multi-year agreements with USA Field Hockey, US Lacrosse, US Soccer, National Intramural Recreational Sports and has also hosted training sessions for MLS's Kansas City Wizards, Chivas USA, and the Columbus Crew.

Phase III is currently in the planning stage. The complex is unable to host collegiate championship events due to the lack of a stadium facility. Complex officials are exploring the addition of a 10,000-seat stadium that has a press box, locker rooms, and is of championship quality.



*Striker Park – Richmond, Virginia*

The Richmond Strikers Soccer Club (RSSC) owns and operates the 11-field Striker Park in Glen Allen, Virginia. The Soccer Club has strategic partnerships for the use of three additional field complexes with the Soccer Club maintaining one of those complexes. There are 4,000 youth and adult members of the RSSC.

The RSSC purchased and developed the 42-acre Striker Park in the early 1980's. It was the first soccer specific complex on the East Coast at the time. It has 10 Bermuda grass, irrigated fields and one artificial surface field with lighting. The complex has 850 parking spaces. None of the fields have permanent seating.

They also utilize the West Creek Fields, Capital Park, and Longdale Fields complexes. The West Creek Fields complex has 10 natural grass fields and no lighting. There are 1,200 parking spaces that RSSC has full access to on-site but they can also access another 1,800. The parking lots and fields are located on 38-acres of a 234-acre complex. The West Creek Business Park site is privately owned by a business that was going to develop it for a major manufacturing plant. When those plans fell through an agreement was reached with RSSC to develop the fields. RSSC leases the fields exclusively and is responsible for their maintenance.

Capital Park, formerly the CASL Fields, was developed in the mid-1980's on land owned and maintained by the Henrico County School Board. There are five natural grass fields and two are lighted. Construction of the fields was funded by the RSSC. The RSSC has exclusive rights to the fields but allow the adjacent elementary school soccer team to utilize the fields.



The focus of the Longdale Fields is for the RSSC's youth development programs. It has 3-acres of field space that is parceled into squares, or training grids, to accommodate younger players in the RSSC's 8-12 year old programs. When not in grids there are three 55x80 fields with smaller goals. There are two acres of parking and a clubhouse.

Additionally, the RSSC is the biggest user of a 12-field artificial surface field complex for their tournaments only. The complex was originally named Sports Quest and was developed by a private company two years ago. The company went out of business and the complex recently went to public auction. The complex was purchased by Shaw Industries, the manufacturer of artificial field surface field materials, and was rebranded as River City Sports. There are plans to add five synthetic turf fields for a total of 17 fields.

There are 13 full-time employees with the RSSC including one executive director, two tournament directors, one recreation league administrator, and three groundskeepers for a total of seven managing the fields and programming. Six of the 13 positions are dedicated to coaching and one is a travel administrator for their travel, competitive teams.

The RSSC promotes three major tournaments with the Jefferson Cup being one of the largest soccer tournaments in the country. The Jefferson Cup was started 22 years ago and is held the first two weeks of March. There are 918 teams over the course of three weekends. Sixty-five (65) fields are used of which 30 are RSSC fields and 35 are County wide fields. The Jefferson Cup has 13,500 players and 20,250 spectators of which 98% are from outside of a 50 mile radius. The economic impact for the tournament is estimated at \$15 million. Approximately 22,000 hotel rooms are booked for the tournament.

The RSSC hosts a November tournament called the Capital Fall Classic that covers two weekends and attracts 350 teams with approximately 175 teams competing each weekend. The tournament has an estimated economic impact of \$2 million with 65% of participants traveling from outside a 50-mile radius.

There are two other club soccer programs in the Richmond area that contract with RSSC to manage their tournaments annually. The RSSC is recognized as professional managers of large, successful tournaments.

The RSSC does not offer rental of their fields at Striker Park or Capital Park to outside groups. The only two exceptions are the elementary school at Capital Park and US Club Soccer which occasionally utilize some fields at West Creek. RSSC has contemplated diversifying into the lacrosse and field hockey field rental and tournament business but have not taken that step as of yet.

Striker Park and the West Creek Fields each have natural grass fields, with Striker Park having one artificial surface field. As such, the fields are rotated with their usage in the summer for two months so that the fields can be maintained properly and kept in the best condition possible. The grass fields are also closed down for play from mid-November to the beginning of March. RSSC teams shift to non-RSSC owned indoor complexes for their winter training.

## Summary –Multi-Field Sports Complexes

The following summarizes common themes/lessons learned from the profiled comparable multi-field sports complexes:

- The mission of the complex is clear, concise, and conveyed to both potential event users and the community.
- There is a balance between soliciting tournament activity that generates economic impact and serving area residents.
- There is a booking priority system in place for determining which tournaments will be booked to maximize economic impact.
- There is a full-time, dedicated staff of experienced professionals that manage and market the complex and understand the unique needs of tournament promoters and local sports organizations.
- Tournament activity occurs most weekends.
- There is an established partnership with a limited number of primary users (e.g., local sports organizations) that exclusively book the majority of field time outside of tournament activity in order to maximize weekday usage and revenue.
- There is a focus on being a well-designed complex to effectively meet the needs of their target users (e.g., tournament promoters) and community sports organizations. Maintaining high-quality, tournament-level fields is an operating priority.
- Each complex has a critical mass of fields to accommodate sports competitions/tournaments.
- The complex design incorporates the specific needs of tournament players and attendees including warm-up areas, quality restroom facilities, concessions, technology needs, officials and staff office space, netting systems for lacrosse, and playgrounds.
- Booking priorities, operating strategies, and funding sources at several of the profiled multi-field sports complexes reflects their primary objective to drive sport tourism and related economic impact.

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## Economic Analysis

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One objective of this study is to estimate the economic and fiscal impacts associated with operations of the proposed new MLL stadium and multi-field sports complex to the local economy. Tangible and intangible benefits associated with the proposed new MLL stadium/multi-field sports complex include, but are not limited to, the following

- Enhancing the County's appeal as a sports destination
- Receiving increased State, regional and national media exposure
- Providing a first-class stadium and complex for area residents and out-of-town attendees that complements other existing venues
- Enhancing the overall quality of life and livability of the area
- Capitalizing on existing and planned tourism efforts
- Serving as a catalyst for other potential development initiatives
- Providing venues to retain and expand existing sports programs as well as develop new ones
- Generating additional economic activity in terms of spending, jobs, and earnings
- Generating additional fiscal revenues for local and State governments

Each of these benefits is important in assessing the overall impact of the proposed new stadium and multi-field sports complex to the County. While the value of most of these benefits is difficult to measure, the estimated economic activity generated can be quantified. This analysis quantifies the direct, indirect and induced benefits associated with operations of the proposed stadium and multi-field sports complex including the associated tax revenues. Although the majority of the events that could potentially be held at the proposed new stadium and multi-field sports complex represent incremental new activity to the County, many events (e.g., Chesapeake Bayhawks games) are currently held at other facilities in the State.

### General Methodology Overview

An assessment of the economic benefits that could occur in the County and State as a result of the proposed new stadium and multi-field sports complex can be approached in several ways. The approach used in this analysis considers estimated gross facility revenues (e.g., ticket sales, field rental, premium seating, food/beverage, merchandise, parking, and advertising as well as spending by participants and spectators outside the complex on items such as hotels/lodging, restaurants, retail, entertainment/recreation and transportation as the initial measure of economic activity in the marketplace. Once the amount for direct spending is quantified, a calculated multiplier is applied to generate the indirect and induced effects. The sum of direct, indirect and induced effects equals total economic impact which is expressed in terms of spending (output), employment (jobs), and personal earnings.

This analysis also estimates the fiscal impacts generated from on-going operations of the proposed new stadium and multi-field sports complex including admissions and amusement tax, corporate income tax, hotel occupancy tax, personal income tax, and sales and use tax.



All amounts depicted in this analysis are presented in current dollars, reflect a stabilized year of operations and assume taxes continue at their current rates.

**Methodology – Economic Impact Analysis**

Regional input-output models are typically used by economists as a tool to understand the flow of goods and services among regions and measure the complex interactions among them given an initial spending estimate.

Direct Spending

Estimating direct spending is the first step in calculating economic impact. Direct spending represents the initial change in spending that occurs as a direct result of operations of the proposed new MLL stadium and multi-field sports complex. Direct spending occurs both inside and outside of the MLL stadium and multi-field sports complex. In addition, adjustments are made to account for leakage (spending that occurs outside of the local and State economies) and displacement (spending that would have occurred elsewhere in the local economies without the presence of the proposed new MLL stadium and multi-field sports complex) in order to reflect incremental new spending to the local and State economies.

## Indirect and Induced Impacts

The economic activity generated by operations of the proposed new MLL stadium and multi-field sports complex affects more than just the facilities. In preparation for new spending in the economy, several other economic sectors are impacted and jobs are created. Indirect effects reflect the re-spending of the initial or direct expenditures or the business-to-business transactions required to satisfy the direct effect. Induced effects reflect changes in local spending on goods and services that result from income changes in the directly and indirectly affected industry sectors. The model generates estimates of these impacts through a series of relationships using local-level average wages, prices and transportation data, taking into account commute patterns and the relative interdependence of the economy on outside regions for goods and services.

## Multiplier Effect

In an effort to quantify the inputs needed to produce the total output, economists have developed multiplier models. The estimation of multipliers relies on input-output models, a technique for quantifying interactions between firms, industries and social institutions within a local economy. This analysis uses IMPLAN software and databases which are developed under exclusive rights by the Minnesota IMPLAN Group, Inc. IMPLAN, which stands for *Impact Analysis for Planning*, is a computer software package that consists of procedures for estimating local input-output models and associated databases. The IMPLAN software package allows the estimation of the multiplier effects of changes in final demand for one industry on all other industries within a defined economic area. Its proprietary methodology includes a matrix of production and distribution data among all counties in the U.S. As such, the advantages of this model are that it is sensitive to both location and type of spending and has the ability to provide indirect/induced spending, employment and earnings information by specific industry category while taking into account the leakages associated with the purchase of certain goods and services outside the economy under consideration.

Once the direct spending amounts are assigned to a logical category, the IMPLAN model estimates the economic multiplier effects for each type of direct new spending attracted to or retained in the County resulting from operations of the proposed new stadium and multi-field sports complex.

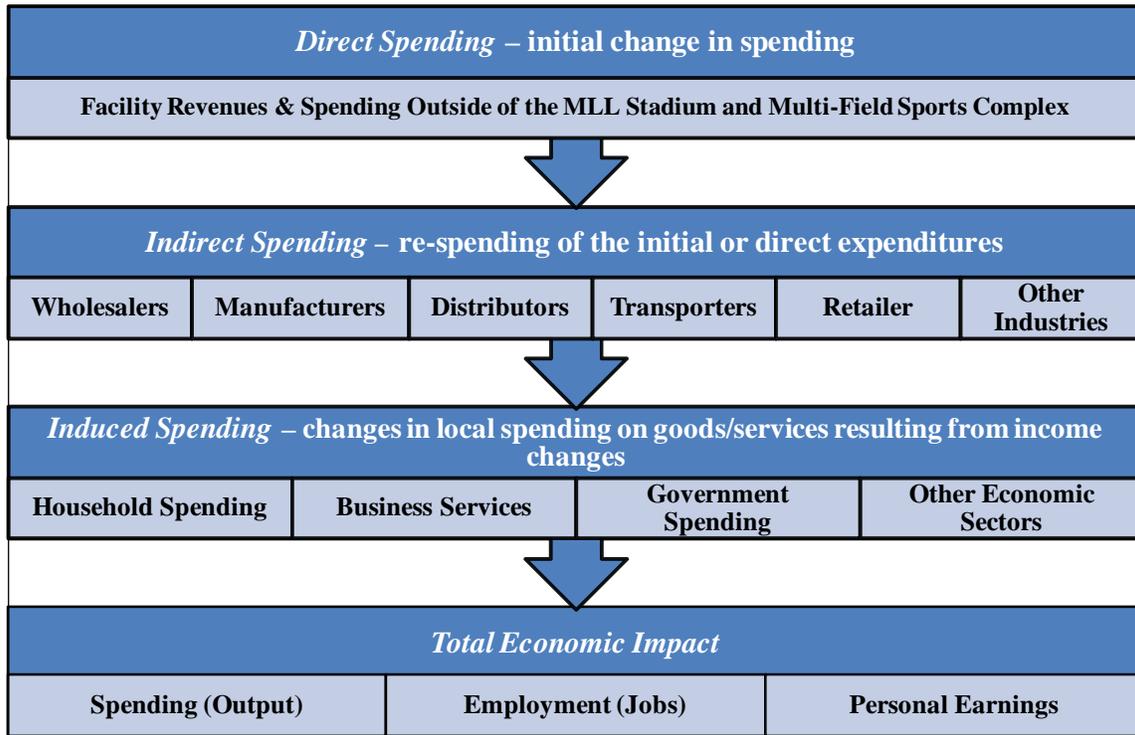
## Total Economic Impact

The calculated multiplier effect is then added to the direct impact to quantify the total economic impact in terms of spending, employment and earnings which are defined below:

- *Spending (output)* represents the total direct and indirect/induced spending effects generated by the proposed MLL stadium and multi-field sports complex. This calculation measures the total dollar change in spending (output) that occurs in the local economy for each dollar of output delivered to final demand.
- *Employment (jobs)* represents the number of full and part-time jobs supported by the proposed MLL stadium and multi-field sports complex. The employment multiplier measures the total change in the number of jobs supported in the local economy for each additional \$1.0 million of output delivered to final demand.

- *Personal Earnings* represent the wages and salaries earned by employees of businesses associated with or impacted by the proposed MLL stadium and multi-field sports complex. In other words, the multiplier measures the total dollar change in earnings of households employed by the affected industries for each additional dollar of output delivered to final demand.

The following graphic illustrates the multiplier effects for calculating total economic impact.



### Methodology - Fiscal Impact Analysis

The estimated spending generated from operations of the proposed new MLL stadium and multi-field sports complex also creates tax revenues for the County and the State. Experience in other markets suggests that while a significant portion of the direct spending likely occurs near the project, additional spending occurs in other surrounding economies. Major tax sources impacted by facility operations were identified and taxable amounts to apply to each respective tax rate were estimated. Although other taxes may also be positively impacted, this analysis estimated the revenues generated from the following taxes based on the direct and indirect/induced spending amounts previously defined:

#### Prince George’s County

- Admissions and amusement tax
- Hotel/motel tax
- Local personal income tax

#### State of Maryland

- Corporate income tax
- Personal income tax
- Sales and use tax

### Summary of Estimated Annual Incremental Economic Benefits

The tables below summarize the estimated economic benefits from the on-going activities of the proposed new MLL stadium and multi-field sports complex as measured by spending, jobs and earnings.

On-going activities at the proposed new MLL stadium are estimated to generate between \$7.4 million and \$8.1 million annually in incremental new direct spending to the County of which approximately \$2.0 million to \$2.2 million would be incremental new to the State.

Proposed New MLL Stadium in Prince George's County						
Estimated Annual Incremental Economic Benefits From On-Going Operations						
Category	Prince George's County			State of Maryland		
	Range			Range		
<b>Spending</b>						
Direct Spending	\$7,426,000	-	\$8,108,000	\$2,029,000	-	\$2,249,000
Indirect/Induced Spending	\$4,852,000	-	\$5,284,000	\$1,358,000	-	\$1,496,000
Total Spending	\$12,278,000	-	\$13,392,000	\$3,387,000	-	\$3,745,000
<b>Total Jobs</b>	170	-	180	50	-	50
<b>Total Earnings</b>	\$4,431,000	-	\$4,833,000	\$1,213,000	-	\$1,343,000

On-going activities at the proposed new multi-field sports complex are estimated to generate between \$17.4 million and \$19.3 million annually in incremental new direct spending to the County of which approximately \$8.9 million to \$9.9 million would be incremental new to the State.

Proposed New Multi-Field Sports Complex in Prince George's County						
Estimated Annual Incremental Economic Benefits From On-Going Operations						
Category	Prince George's County			State of Maryland		
	Range			Range		
<b>Spending</b>						
Direct Spending	\$17,359,000	-	\$19,333,000	\$8,923,000	-	\$9,928,000
Indirect/Induced Spending	\$10,793,000	-	\$12,021,000	\$5,549,000	-	\$6,174,000
Total Spending	\$28,152,000	-	\$31,354,000	\$14,472,000	-	\$16,102,000
<b>Total Jobs</b>	320	-	360	170	-	180
<b>Total Earnings</b>	\$10,121,000	-	\$11,271,000	\$5,208,000	-	\$5,796,000

The following section provides a description of the assumptions used in this analysis.

## General Assumptions

Based on input from the client group, several assumptions were used to develop estimates of event activity, financial operations and economic/fiscal impacts for the proposed new MLL stadium and multi-field sports complex. It should be noted that these assumptions are preliminary and will be further refined as decisions related to the building programs and other operating characteristics continue to evolve.

The analysis performed was limited in nature and, as such, Crossroads Consulting does not express an opinion or any other form of assurance on the information presented in this report. As with all estimates of this type, we cannot guarantee the results nor is any warranty intended that they can be achieved. The estimates are based on the anticipated size, quality and efficiency of the proposed new MLL stadium and multi-field sports complex. Since these estimates and assumptions are based on circumstances that have not yet transpired, they are subject to variation. Further, there will usually be differences between estimated and actual results because events and circumstances frequently do not occur as expected, and those differences may be material.

- The proposed new MLL stadium and multi-field sports complex are built at the Green Branch Park in Prince George's County.
- The preliminary building program outlined in this report for the proposed MLL stadium and multi-field sports complex under consideration is built as is the required amenities to support the facilities.
- Proposed stadium and multi-field sports complex are designed specifically to accommodate the unique aspects of the tournament industry as well as local user groups.
- The proposed new MLL stadium and multi-field sports complex are owned by the County and managed by personnel that specializes in marketing/management/programming of similar facilities and has established contacts and strong relationships with State/regional/national event promoters/producers from various sports organizations (e.g., US Lacrosse) as well as area collegiate/scholastic/recreational sports entities in order to maximize marketability and usage.
- The proposed new stadium and multi-field sports complex are aggressively marketed by established tourism and sports marketing agencies in the County and State in addition to facility and team marketing efforts.
- A high level of quality customer service is provided.
- The site is adequate in terms of visibility, ingress and egress, parking, safety and other similar issues.
- Sufficient supporting infrastructure is located nearby to support stadium and multi-field sports complex activities (i.e., hotel rooms, restaurants, retail, entertainment, etc.)
- No other similar competitive/comparable facilities are built in the region.

### Attendance Assumptions

The economic and fiscal impacts analysis is based on several factors including a hypothetical estimate of utilization that was developed from the research previously summarized including input from the client group, market research, industry trends, historical attendance for the Bayhawks and other MLL teams, input from potential demand generators, the proposed building programs, information on comparable facilities as well as other research.

Event activity at new facilities typically experiences a “ramp up” period to a stabilized level of activity which occurs for several reasons. For instance, some groups that book their event several years in advance may not want to risk that a facility’s construction is delayed and not completed in time for their event. In addition, some groups may choose to let management “fine tune” its operations before meeting in a new facility. In addition, event promoters noted that attendance at many larger tournaments takes time to grow and mature in a new facility and geographic location. However, it is important to recognize that the overall utilization at any facility is typically dependent on a number of factors (e.g., market size; accessibility; nearby amenities; size, configuration and quality of the facilities offered; effectiveness of the management team in booking the facility; date availability; cost, etc.) and is rarely consistent. As such, estimated utilization represents a stabilized year of operations.

#### *MLL Stadium*

The table below shows the estimated event activity at the proposed new 22,000-seat MLL stadium which ranges from 16 to 18 events and 138,000 to 152,000 in total attendance. Based on market research, it is assumed that nearly all of the activity would be incremental new to the County whereas approximately 25% is assumed to be incremental new to the State. This incremental activity reflects new events as well as increased attendance at events currently taking place in other locations throughout Maryland with a new stadium.

<b>Estimated Event Activity - Proposed New MLL Stadium in Prince George's County</b>			
<b>Number of Events</b>			
<b>Event Type</b>	<b>Range</b>		
MLL (Regular Season)	8	-	8
Other Sporting Events	2	-	3
Concerts/Festivals	1	-	1
Other Community Events	5	-	6
<b>Total</b>	<b>16</b>	<b>-</b>	<b>18</b>
<b>Average Attendance</b>			
<b>Event Type</b>	<b>Range</b>		
MLL (Regular Season)	11,000	-	11,500
Other Sporting Events	5,000	-	5,000
Concerts/Festivals	15,000	-	15,000
Other Community Events	5,000	-	5,000
<b>Total Attendance</b>			
<b>Event Type</b>	<b>Range</b>		
MLL (Regular Season)	88,000	-	92,000
Other Sporting Events	10,000	-	15,000
Concerts/Festivals	15,000	-	15,000
Other Community Events	25,000	-	30,000
<b>Total</b>	<b>138,000</b>	<b>-</b>	<b>152,000</b>

Event types used in the analysis are defined as follows:

- MLL represents regular season Bayhawks games, no playoff activity is assumed.
- Other sporting events may include lacrosse, soccer, rugby, field hockey, and ultimate Frisbee competitions/tournaments at all levels.
- Concerts/festivals include traditional touring acts as well as ethnic/music/food festivals, some may be multi-day in nature, which are common in outdoor stadiums.
- Other community events include activities such as graduations, band competitions, car/motorcycle/recreational vehicle shows, family reunions and fundraising events such as a charity walk. In addition, although it is anticipated that the proposed stadium may host a variety of other events throughout the year such as meetings, seminars, banquets, receptions, weddings and holiday parties that may utilize space within the venue such as club/lounge areas, this activity is not reflected in the estimated utilization.

### *Multi-Field Sports Complex*

The table below shows the estimated event activity at the proposed new multi-field sports complex which ranges from 18 to 20 tournaments and 306,000 to 345,000 in total attendance. Based on market research, it is assumed that nearly all of the activity would be incremental new to the County whereas approximately 40% is assumed to be incremental new to the State. This incremental activity reflects new events as well as increased attendance at events currently taking place in other locations throughout Maryland with a new multi-field sports complex.

<b>Estimate of Event Activity - Proposed New Multi-Field Sports Complex in Prince George's County</b>			
<b>Category</b>	<b>Range</b>		
<b>Season</b>	March 1 - November 30		
<b>Tournament Activity</b>			
Total Events	18	-	20
Total Event Days	36	-	40
Number of Participants	36,000	-	40,000
Number of Spectators	90,000	-	100,000
Average Length of Stay (Days)	2.0	-	2.0
Total Attendee Days	252,000	-	280,000
Room Nights	50,400	-	56,000
<b>League Activity</b>			
Total Participant Days	54,000	-	64,800
<b>Grand Total Attendee Days</b>	<b>306,000</b>	<b>-</b>	<b>344,800</b>

Event types used in the analysis are defined as follows:

- Tournaments include multi-day youth and amateur competitions in a variety of sports such as lacrosse, soccer, rugby, ultimate Frisbee and field hockey. These events may include teams from throughout Maryland, the surrounding region and/or national level competitions.
- League activity includes elite (or premier) club sport play for youth and amateurs in various sports such as lacrosse, soccer, rugby, ultimate Frisbee and field hockey. League activity at the proposed multi-field sports complex is not envisioned to include recreational play on a regular basis.

### Direct Spending

As mentioned previously, the first step in calculating economic impact is estimating the direct spending generated in the area. Direct spending relates to revenues generated from on-going operations of the proposed new MLL stadium and multi-field sports complex as well as attendee spending outside of the facilities. Adjustments were made in order to account for leakage and displacement and better reflect net new spending.

*Gross Incremental Operating Revenues* – Based on the estimated event activity at the proposed MLL stadium presented previously, annual incremental gross operating revenues are estimated to range from approximately \$4.6 million to \$4.9 million in the County of which \$1.4 million would be net new to the State. Annual incremental gross operating revenues at the proposed multi-field sports complex are estimated to range from \$1.5 million to \$1.7 million in the County of which approximately \$540,000 to \$615,000 would be net new to the State.

*Attendee Spending Outside the Facilities* - This category reflects the spending patterns of attendees outside the MLL stadium and multi-field sports complex before and after events. Based on the estimated mix of event activity, attendees were categorized as high impact attendees (which generate hotel room nights) and low impact and assigned different spending amounts based on data provided by secondary sources. These spending amounts were then allocated among various categories including lodging, eating and drinking places, retail, entertainment/recreation and transportation. For purposes of this analysis, a spending amount of \$100 per day for high impact attendees and \$25 per day for low impact attendees are utilized. The estimated spending amounts and the allocation among specific categories are based on various primary and secondary sources including, but not limited to, Maryland Office of Sports Marketing, Maryland Office of Tourism as well as national surveys of sporting event attendees. Based on these and other assumptions, incremental new direct attendee spending outside the proposed new MLL stadium is estimated to range from approximately \$2.8 million to \$3.2 million at the County level of which \$660,000 to \$825,000 would be net new to the State. Incremental new direct attendee spending at the proposed multi-field sports complex is estimated to range from \$15.9 million to \$17.7 million in the County of which \$8.4 million to \$9.3 million would be new to the State.



### *Summary of Direct Spending*

Based on these assumptions, the incremental new direct spending related to on-going operations and attendee spending outside the proposed MLL stadium and multi-field sports complex is estimated to range between \$24.8 million and \$27.4 million in the County. The portion of direct spending estimated to be incremental new to the State ranges from \$11.0 million to \$12.2 million.

These spending amounts are considered direct spending and, therefore, serve as the basis for the multiplier analysis. Direct spending amounts were assigned logical industry categories and relevant multipliers were applied to these amounts in order to calculate estimates for total spending, jobs and earnings.

### Indirect/Induced Spending

The IMPLAN model is used to generate the indirect and induced impacts spawned from the estimated economic activities within the area. The indirect impacts represent inter-industry trade from business to business. Likewise, the induced impacts represent the economic activity spurred by the household trade that occurs when employees make consumer purchases with their incomes. According to the IMPLAN model, incremental new direct spending spurred by the proposed stadium and multi-field sports complex is estimated to generate between \$15.6 million to \$17.3 million annually in indirect/induced spending in the County. The portion of indirect/induced spending estimated to be incremental new to the State ranges from \$6.9 million to \$7.7 million.

### Total Spending

Outputs from the IMPLAN model indicate that total (i.e., direct, indirect and induced) spending generated from the proposed stadium and multi-field sports complex is estimated to range from \$40.4 million to \$44.7 million annually in the County. The portion of total spending estimated to be incremental new to the State ranges from \$17.9 million to \$19.8 million. Dividing the total impacts by the direct impacts yields an economic multiplier of approximately 1.6. Thus, every dollar of direct spending is estimated to generate \$1.60 in total economic activity.

### Total Jobs

The IMPLAN model calculates the number of jobs per \$1.0 million in direct spending. As such, the economic activity associated with the on-going operations of the proposed new stadium and multi-field sports complex is estimated to generate between 490 to 540 incremental new jobs in the County of which approximately 220 to 230 would be incremental new to the State. These jobs would be created in many sectors of the economy, which both directly and indirectly support the increased level of business activity in the area.

### Total Earnings

Outputs from the IMPLAN model indicate that incremental new earnings generated from the on-going operations of the proposed new stadium and multi-field sports complex are estimated to range from \$14.6 million to \$16.1 million in the County of which \$6.4 million to \$7.1 million would be incremental new to the State.

### Summary of Estimated Annual Incremental Fiscal Benefits (Tax Revenues)

The tables below summarize the estimated fiscal benefits from the on-going activities of the proposed new MLL stadium and multi-field sports complex for the County and the State.

Annual tax revenues related to on-going operations of the proposed new MLL stadium are estimated to range from \$298,000 to \$321,000 at the County level and \$149,000 to \$167,000 at the State level.

<b>Proposed New MLL Stadium in Prince George's County</b>			
<b>Estimated Incremental Tax Revenues From On-Going Operations</b>			
<b>Municipality/Tax</b>	<b>Range</b>		
<b>Prince George's County</b>			
Admissions & Amusement Tax	\$233,000	-	\$245,000
Local Personal Income Tax	47,000	-	51,000
Hotel Occupancy Tax	18,000	-	25,000
Total	<u>\$298,000</u>	-	<u>\$321,000</u>
<b>State of Maryland</b>			
Sales and Use Tax	\$97,000	-	\$109,000
Personal Income Tax	42,000	-	47,000
Corporate Income Tax	10,000	-	11,000
Total	<u>\$149,000</u>	-	<u>\$167,000</u>
<b>GRAND TOTAL</b>	<b>\$447,000</b>	<b>-</b>	<b>\$488,000</b>

Annual tax revenues related to on-going operations of the proposed new multi-field sports complex are estimated to range from \$437,000 to \$488,000 at the County level and \$790,000 to \$880,000 at the State level.

<b>Proposed New Multi-Field Sports Complex in Prince George's County</b>			
<b>Estimated Incremental Tax Revenues From On-Going Operations</b>			
<b>Municipality/Tax</b>	<b>Range</b>		
<b>Prince George's County</b>			
Hotel Occupancy Tax	\$284,000	-	\$315,000
Local Personal Income Tax	108,000	-	120,000
Admissions & Amusements	45,000	-	53,000
Total	<u>\$437,000</u>	-	<u>\$488,000</u>
<b>State of Maryland</b>			
Sales and Use Tax	\$565,000	-	\$629,000
Personal Income Tax	181,000	-	202,000
Corporate Income Tax	44,000	-	49,000
Total	<u>\$790,000</u>	-	<u>\$880,000</u>
<b>GRAND TOTAL</b>	<b>\$1,227,000</b>	<b>-</b>	<b>\$1,368,000</b>

The pages that follow outline key assumptions used to estimate the incremental new fiscal benefits associated with the on-going operations of the proposed new MLL stadium and multi-field sports complex.

### Prince George's County Taxes

*Admissions and Amusement Tax* - The admissions and amusement tax is a local tax collected by the State Comptroller's Office for local municipalities. The entire amount of the tax collected, less administrative expenses, is returned to the municipalities and counties imposing the local tax. The tax is generally levied on the admission or amusement cost for activities such as movies, amusements, athletic events, concerts, golf and the sale of refreshments at a nightclub or other similar entertainment venue. The tax on admissions differs among local municipalities in Maryland. Prince George's County applies a 5% tax on movies on the historic register and single-screen movie theatres and a 10% tax on the admission or amusement cost for all other activities such as movies, athletic events, concerts and rental of athletic facilities. If the gross receipts from the activity is also subject to the sales and use tax, the admissions and amusement tax is limited to 5%. For purposes of this analysis, the amusement and admissions tax is based on applying a 10% tax rate to estimated incremental new gross ticket sales/facility rental at the proposed MLL stadium and incremental new field rental at the proposed multi-field sports complex.

*Local Personal Income Tax* – Prince George's County imposes a local personal income tax of 3.2% which is applied to adjusted gross income and it applies to the taxable income of residents and nonresidents who derive income from a County source. For purposes of this analysis and based on information provided by the Comptroller of Maryland, an overall effective tax rate of 2.1% is calculated based on the federal adjusted gross income and the total personal income tax paid to the County for calendar year 2010. This effective tax rate is applied to total earnings estimated to be generated by the proposed MLL stadium and multi-field sports complex operations. Because local income tax is based on where you live, not where you work, this analysis assumed that approximately 50% of personal income taxes generated from complex operations occur in the County.

*Hotel/Motel Tax* – Prince George's County imposes a tax on accommodations at a rate of 5.0%. Proceeds from this tax are collected by the County, of which a portion is distributed to the municipality where the tax was collected and to the Board of Education. For purposes of this analysis, the 5.0% hotel/motel tax is applied to incremental new direct hotel spending estimated to be generated by the proposed MLL stadium and sport complex operations.

### State of Maryland

Combined, the sales and use tax, personal income tax, and corporate income tax generate the majority of the State's tax proceeds from all sources. While other taxes may be positively impacted by operations of the proposed stadium and multi-field sports complex, they are not quantified in this analysis.

In general terms, all State tax proceeds are collected in the State's General Fund and then allocated to variety of program areas, such as education, transportation, public safety, and others. As such, individual revenue sources, such as sales and use tax, are not designated to fund specific programs. As a result of this process, municipalities and counties may benefit from a variety of State and locally administered programs. For purposes of this analysis, only collections have been quantified, without regard as to how these funds are ultimately spent through the individual State departments/funds.

The following describes the primary State-level taxes quantified in this analysis based on information obtained from the State of Maryland Comptroller.

*Sales and Use Tax* – The State of Maryland collects a sales and use tax from sales and leases of tangible personal property and services throughout the State. Sales and use tax is uniform throughout the State at 6.0%. This tax source is the State's second largest source of general fund revenue. The sales and use tax rate for the sale of alcoholic beverages was recently increased to 9.0%. However, for purposes of this analysis, the 6.0% tax rate is applied to estimated taxable direct and indirect/induced spending at the State level generated from stadium and multi-field sports complex operations which represents a conservative estimate relative to the sale of alcoholic beverages.

*Personal Income Tax* – The State of Maryland imposes a personal income tax assessed against personal income earned in the State. The State income tax is a graduated rate ranging from 2.0% to 6.25% of taxable income. Non-residents are subject to a special nonresident tax rate of 1.25% in addition to the State income tax rate. This tax source is the State's largest single source of general fund revenue. For purposes of this analysis and based on information provided by the Comptroller of Maryland, an effective tax rate of 3.48% was calculated based on the federal adjusted gross income and the total personal income tax paid to the State in 2010 (the most recent year for which data was available). This effective tax rate was applied to total State-level earnings estimated to be generated by operations of the proposed stadium and multi-field sports complex.

*Corporate Income Tax* – A corporate income tax of 8.25% of corporate federal taxable income adjusted by State modifications is also levied by the State of Maryland on corporations. For purposes of this analysis and based on information provided by the Comptroller of Maryland, an effective tax rate of 0.30% was calculated based on the Gross State Product and the total corporate income tax paid to the State in 2010. This effective tax rate was applied to total State-level spending estimated to be generated by operations of the proposed MLL stadium and multi-field sports complex.

### *Construction Impacts*

Although not quantified in this analysis, construction costs associated with development of the proposed MLL stadium and multi-field sports complex would provide additional economic and fiscal impacts to the County and State during the construction period.

## MLL Special Events

Although MLL All-Star and Championship playoff games are not shown in the utilization estimates for the proposed new MLL stadium, these events provide an opportunity to produce additional economic and fiscal benefits on a sporadic basis.

### *MLL All-Star Game*

The MLL All-Star Game, which typically occurs annually in late June or early July, has averaged 10,200 fans over the last five years.

MLL All-Star Game					
Year	Stadium	Location	Stadium Capacity	Attendance	% Capacity
2008	INVESCO Field at Mile High	Denver, CO	76,125	10,124	13%
2009	INVESCO Field at Mile High	Denver, CO	76,125	10,123	13%
2010	Harvard Stadium	Boston, MA	30,323	11,771	39%
2011	Harvard Stadium	Boston, MA	30,323	11,186	37%
2012	FAU Stadium	Boca Raton, FL	30,000	7,854	26%
<b>Average</b>			<b>48,600</b>	<b>10,200</b>	<b>21%</b>

Note: INVESCO Field is now known as Sports Authority Field at Mile High.

Source: MLL.

The 2013 MLL All-Star Game will be held on July 13, 2013 at the American Legion Memorial Stadium in Charlotte, North Carolina. The stadium is home to the Charlotte Hounds, a 2012 MLL expansion team. This will mark the first time MLL will host a league special event in Charlotte.

The 2013 MLL All-Star Game will revisit the 2011 format in which two ultimate fans will get to play General Manager and pick their fantasy All-Star teams on Friday night of All-Star weekend. They will serve as honorary captains and take part in all team activities during the course of the weekend. In 2013, the MLL All-Star Youth Tournament will be held in conjunction with the All-Star weekend's events. Youth teams from around the country will have an opportunity to compete in a jamboree style tournament taking place the Saturday and Sunday of All-Star weekend. They will also be able to take part in the pre-event festivities Friday night which include special All-Star player clinics and viewing the selection process of the teams by the winners of the Ultimate Fan Fantasy Contest.

### *MLL Championship Weekend*

MLL Championship Weekend is held in August. The Bayhawks are one of the winning franchises in MLL. The team has appeared in six championship games since the League's inception and won in 2002, 2005, 2010 and 2012. As shown in the following table, attendance at MLL championship games has averaged 6,900 per game over the last five years.

MLL Championship Game Attendance					
Year	Stadium	Location	Stadium Capacity	Attendance	% Capacity
2008	Harvard Stadium	Boston, MA	30,323	8,481	28%
2009	Navy-Marine Corps Memorial Stadium	Annapolis, MD	34,000	7,003	21%
2010	Navy-Marine Corps Memorial Stadium	Annapolis, MD	34,000	6,445	19%
2011	Navy-Marine Corps Memorial Stadium	Annapolis, MD	34,000	5,027	15%
2012	Harvard Stadium	Boston, MA	30,323	7,384	24%
<b>Average</b>			<b>32,500</b>	<b>6,900</b>	<b>21%</b>

Source: MLL.

## Summary

Market research suggests relatively limited demand for the proposed new 22,000-seat MLL stadium which is further supported by the fact that no MLL team currently plays in a lacrosse-specific stadium. Although the Bayhawks are envisioned to serve as the primary tenant, the ability to consistently attract other sports and entertainment activity to this size venue appears challenging. As such, any business model would be very dependent on the long-term success of the MLL team as well as the league itself. In addition, although the majority of estimated activity at the proposed new MLL stadium would be incremental new to Prince George's County, it would primarily represent a transfer of existing activity and related economic and fiscal impacts at the State level.

By contrast, there appears to be strong market demand for the proposed multi-field sports complex, particularly given the lack of a comparable complex in the County and the relatively limited date and space availability at other existing venues in Maryland. The proposed multi-field sports complex could serve a variety of demand generators including various levels of competitions/tournaments for multiple sports. As with the proposed MLL stadium, all of this activity would be incremental new to the County while only a portion would be net new to the State. In addition, the type and amount of event activity estimated to occur at the proposed multi-field sports complex would generate significant economic and fiscal benefits to both the County and the State.

A natural question is whether the County should consider constructing a smaller MLL stadium. Although a stadium with a seating capacity of between 12,000 and 14,000 could likely adequately accommodate the Bayhawks for the foreseeable future, the existing supply of facilities in the State and input from potential demand generators suggest that the marketability for other events would still be relatively limited and would not likely justify the construction cost from an economic perspective.

From a long-term planning perspective, the County may want to consider the merits of constructing a smaller, first-class outdoor competitive stadium that would complement the multi-field sports complex. Offering a smaller championship stadium could enhance the complex's marketability and competitiveness for hosting certain competitions/tournaments. Such a facility could offer a relatively limited number of permanent seats that could be augmented by temporary seats on an as-needed basis or expanded in the future based on market demand.

## Potential Next Steps

Should the County decide to move forward with the project, typical next steps in the development planning process would include refining the program elements and development schedule; estimating development costs; preparing a conceptual site plan, identifying an operating strategy for the facilities; and approaching potential public and private sector funding partners.