

# **Economic Analysis and Preliminary Site Planning Study for the Proposed Relocation of the Washington Redskins' Team Headquarters/Training Facility**



**Prepared for:**



**Presented by:**



&

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**Final Report  
June 2012**

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June 6, 2012

Mr. Gary McGuigan  
Project Executive  
Maryland Stadium Authority  
333 W. Camden St., Suite 500  
Baltimore, MD 21201

Dear Mr. McGuigan:

Crossroads Consulting Services LLC, in association with Populous, has completed its economic analysis and preliminary site planning study related to the proposed relocation of the Washington Redskins' team headquarters/training facility to Prince George's County, Maryland. In accordance with our agreement, this report summarizes our research and analysis.

The information contained in the report is based on estimates, assumptions, and information developed from market research, knowledge of the sports and entertainment industries, as well as other factors including data provided by the Maryland Stadium Authority, Prince George's County, Washington Redskins' management as well as 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 Maryland Stadium Authority and Prince George's 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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## Introduction and Executive Summary

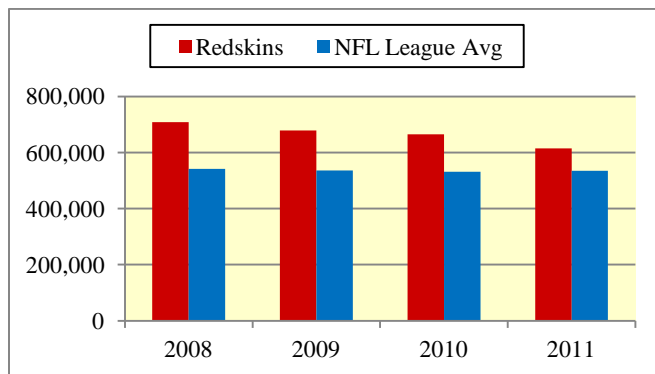
### Project Background

Redskins Park, the year-round headquarters for the National Football League (NFL) Washington Redskins (Redskins), is located on a 162-acre parcel of land in Ashburn, Virginia. Completed in 1991, the existing complex features four football fields (i.e., three grass and one artificial), strength training and sports medicine facilities, offices and meeting rooms for players, coaches and front office staff, and accommodations for print and broadcast media. The team recently constructed a practice bubble which is the first indoor practice facility for the Redskins in franchise history. Redskins Park also hosts the team's training camp each summer where the public can attend complimentary open practice sessions.

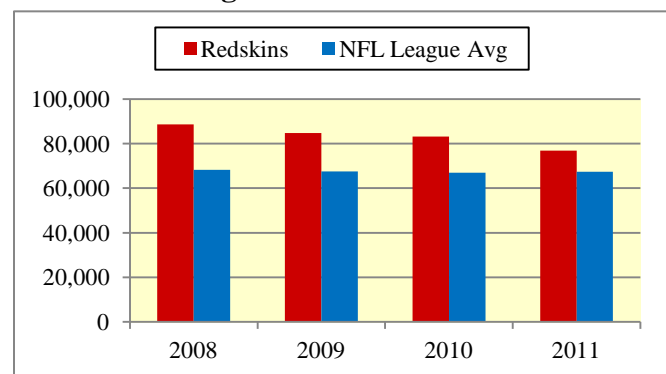
The Redskins play their home games at FedEx Field in Landover, Maryland under a 30-year lease with Prince George's County that expires Aug. 31, 2027. Opened in 1997, the stadium was privately financed by the team. The State of Maryland contributed approximately \$71 million in infrastructure improvements. Prior to the 2011 season, FedEx Field reduced its seating capacity from approximately 91,700 to 82,000 by removing upper deck seats at both end zones. The stadium offers 244 suites and 15,000 club seats. In addition to Redskins games, the facility hosts a variety of special events during the off-season including concerts and soccer matches.

The Redskins have won five NFL Championships (two pre-merger and three Super Bowls). The franchise has captured 10 NFL divisional titles and six NFL conference championships. According to *Forbes Magazine*, the Redskins were valued at approximately \$1.56 billion which ranked second highest in the NFL behind the Dallas Cowboys. The Redskins have consistently been among the NFL leaders in terms of attendance.

**Season Attendance**



**Average Per Game Attendance**



Note: 2011 attendance figures reflect smaller seating capacity at FedEx Field.

Source: NFL.

Currently, Redskins employees are split between its headquarters facility in Ashburn, Virginia and FedEx Field which are approximately 50 miles apart. Its aging headquarters has prompted the team to explore alternative options which include, but are not limited to, remaining in Loudoun County at a new or substantially improved facility or relocating to a new facility in another location. However, if the team considers moving its headquarters from Virginia before its lease at FedEx Field expires in 2027, it must negotiate with Prince George's County first about possibly moving to the County before initiating a move elsewhere. It is our understanding that the two entities would like to explore the merits of the Redskins relocating its team headquarters to Prince George's County.

## **Purpose of the Study**

Given this backdrop, Crossroads Consulting Services LLC (Crossroads), in association with Populous, was retained to prepare an economic analysis and preliminary site planning study related to the proposed relocation of the Washington Redskins' team headquarters/training facility to Prince George's County, Maryland. The potential site under consideration is part of a 250-acre parcel, including 219 acres of undeveloped County-owned land that is adjacent to a Maryland Area Regional Commuter (MARC) Station and Bowie State University (Bowie State). The Maryland-National Capital Park and Planning Commission (M-NCPPC) has developed a master plan for this site which is thoroughly detailed in the *2010 Approved Bowie State MARC Station Sector Plan and Sectional Map*.

The primary purpose of this analysis is to assess the overall viability of the proposed headquarters/training facility relocation from an economic perspective, provide general observations about the proposed site's ability to accommodate the required facilities and amenities, as well as to develop a conceptual site plan diagram for the project.

No detailed architectural-related services such as an environmental assessment, noise analysis, traffic study, conceptual site and facility design, or preliminary cost estimate of the conceptual design are provided as part of this initial study effort.

## **Work Plan**

Specific research tasks conducted for this analysis include, but were not limited to:

- Conducted meetings with client representatives and stakeholders to obtain an understanding of the background, history and key issues related to the study as well as their perspectives on the benefits, challenges, and opportunities associated with the proposed project.
- Obtained and analyzed historical data regarding the Washington Redskins' team and training facility operations.
- Reviewed select data from comparable NFL team operations.
- Estimated the economic and fiscal impacts associated with relocation of the Redskins' team headquarters, training facility and training camp based on primary and secondary research.
- Developed an outline of program requirements.
- Prepared conceptual site diagram concepts.
- Summarized our research, analysis and findings in a written document.

## Executive Summary

The methodology used to assess the overall viability of the proposed relocation of the Washington Redskins' team headquarters/training facility from Loudoun County, Virginia to Prince George's County, Maryland from an economic perspective is generally similar to that of any major corporate relocation. However, the total annual payroll of the organization (approximately \$120 million based on information provided by the team), particularly relative to the number of employees, as well as the significant amount of media exposure and prestige associated with this specific entity are unique.

### Economic and Fiscal Impact Analysis – Ongoing Operations of the Headquarters/Training Facility

The Washington Redskins employ approximately 210 total players, coaches, trainers and front office staff (e.g., owner, general manager, vice presidents, director of player personnel, etc.), approximately 120 of which are currently based at the existing headquarters in Ashburn with the remaining employees working at FedEx Field in Landover. The proposed relocation of team operations to Prince George's County, and particularly the incremental influx of salaries associated with players and front office personnel would spur additional spending, jobs, earnings and tax revenues in the County and the State. Because FedEx Field is located in Prince George's County, this analysis does not estimate any economic or fiscal benefits associated with stadium operations. In addition, adjustments are made to estimated total team salaries to account for the fact that some employees already reside in the County and/or the State.

The following table summarizes the estimated incremental new economic and fiscal impacts generated from the relocation of the team's headquarters/training facility to Prince George's County. Because some team personnel who do not currently reside in Maryland may choose not to move to the State if the team relocates, a sensitivity analysis was conducted for three scenarios that assume different percentages of incremental new team-related compensation that would transfer to Maryland:

<b>Summary of Annual Economic and Fiscal Impacts – Ongoing Operations</b>			
<b>Category</b>	<b>Scenario 1</b>	<b>Scenario 2</b>	<b>Scenario 3</b>
<b>Economic Benefits</b>			
Direct Spending	\$45.5 million	\$39.8 million	\$34.1 million
Indirect/Induced Spending	\$25.9 million	\$22.7 million	\$19.4 million
Total Spending	\$71.4 million	\$62.5 million	\$53.6 million
Total Jobs	870	760	650
Total Earnings	\$67.3 million	\$58.9 million	\$50.5 million
<b>Fiscal Benefits</b>			
State Personal Income Tax	\$4.8 million	\$4.2 million	\$3.6 million
State Sales and Use Tax	\$856,000	\$752,000	\$643,000
Local Personal Income Tax	\$995,000	\$870,000	\$746,000
Local Property Tax	TBD	TBD	TBD
Total Fiscal Benefits	\$6.7 million	\$5.8 million	\$5.0 million

**Major assumptions:**

- Scenario 1 assumes that 90% of players' salaries and 50% of non-player salaries transfer to Maryland.
- Scenario 2 assumes that 80% of players' salaries and 40% of non-player salaries transfer to Maryland.
- Scenario 3 assumes that 70% of players' salaries and 30% of non-player salaries transfer to Maryland.
- All scenarios assume that 40% of team personnel moving to Maryland will reside in Prince George's County.
- TBD denotes "to be determined".
- Amounts are in current dollars and reflect a single year of operation.

Research indicates that the range of construction costs for NFL team headquarters/training facilities varies significantly based on factors such as age, program elements and geographic location. Given the preliminary nature of this analysis, construction costs associated with development of the proposed new headquarters/training facility have not been quantified. As such, the County and State will likely realize additional economic and fiscal impacts associated with the project. For instance, property taxes were not estimated in this report. However, although no estimate has been prepared for the potential assessed value of the land and improvements associated with this project, approximately \$14,310 in real property taxes could be generated per \$1 million of assessed value, of which approximately \$9,600 (or 67%) would flow directly to Prince George's County based on current tax rates. As a point of reference, a property with an assessed value of \$50 million would generate approximately \$715,500 in total real property taxes of which \$480,000 would flow directly to the County as a portion of property tax collections are allocated to other entities and/or specific uses. The County could also realize benefits from personal property taxes that are imposed on the assessed value of business owned personal property (e.g., equipment in the building). Finally, the County and State will also realize economic and fiscal benefits during the construction period.

#### Economic and Fiscal Impact Analysis – Training Camp

In addition to the previously stated economic and fiscal impacts associated with the ongoing operations of the proposed new headquarters/training facility, a secondary benefit to the County and the State would result from the operations of the team's training camp which is currently held at Redskins Park in Ashburn, Virginia. Team representatives indicated that training camp, which is free for the public to attend, typically draws between 100,000 and 110,000 fans each year, including approximately 15,000 during the Redskins' Fan Appreciation Day. The incremental new direct spending associated with training camp was estimated to range from \$2.0 million to \$2.2 million annually which could generate between \$3.1 million and \$3.4 million in total spending, support between 30 and 40 total jobs, and create between \$1.2 million and \$1.3 million in total personal earnings annually. Furthermore, preliminary estimates suggest that training camp activities could generate approximately \$225,000 in fiscal impacts annual, the majority of which would occur at the State level from sales and use tax and personal income tax collections.

#### Relative Advantages/Disadvantages of the Proposed Project

Relative advantages of the proposed team's relocation include creating significant economic impacts in terms of spending, jobs and earnings as well as fiscal impacts to the County and State. This proposed facility would provide enhanced local and State image through increased media exposure and broaden market reach to new visitors. The team headquarters/training facility could complement current plans for the site as outlined in the Bowie State MARC Station Sector Plan and potentially accelerate certain elements of the proposed development plan. In addition, the proposed project provides an opportunity to foster synergies/relationships with Bowie State such as providing venue for internships or other educational partnerships.

By contrast, the proposed team headquarters/training facility may be perceived as interfering with existing plans for the site outlined in the proposed Bowie State MARC Station Sector Plan. In addition, vehicular access to the site would need to be improved given anticipated additional traffic flow.



Furthermore, some players who choose to relocate to Maryland may not choose to live in Prince George's County given the proximity of the proposed site to other counties resulting in less personal income tax revenues at the County level.

### Site Plan Options

In addition to the economic analysis, Populous prepared a preliminary site study that explored various physical planning considerations for the proposed new Redskins' headquarters/training facility, including, but not limited to, a summary of physical planning considerations related to the proposed site, an outline of preliminary program requirements for the new facility, high-level data on comparable facilities as well as conceptual site diagram concepts. Based on input from the team, the proposed development is anticipated to include four outdoor practice fields, one indoor practice field, a training facility, and 285 parking spaces which would require approximately 15 acres. As shown in the following graphics, this preliminary building program physically fits on the proposed site in more than one configuration:

**Site Option 1**



**Site Option 2**



Source: Populous.

The two preliminary conceptual drawings shown above do impact the locations for the proposed University Laboratory School Site and two outdoor athletic fields outlined in the current site plan of the Bowie State MARC Station Sector Plan. However, it appears that the overall site plan could be modified in order to accommodate all elements outlined in the current Bowie State MARC Station Sector Plan as well as the proposed new Redskins' headquarters/training facility.

### Summary

Performing an economic analysis and preliminary site planning study is an initial step in the overall planning and decision-making process. Our research and analysis indicates that the potential relocation of the Washington Redskins' team headquarters/training facility would generate significant quantitative and qualitative benefits to both the County and the State making it a viable development project to further evaluate. The project provides a unique opportunity to relocate a high profile organization, ranked by *Forbes Magazine* as the second most valuable NFL franchise among the 32 teams, to Prince George's County as well as to assist in meeting and potentially accelerating broader planning and



development objectives including those outlined in the Bowie State MARC Station Sector Plan. The proposed project's compatibility with the Bowie State MARC Station Sector Plan was also noted in the ULI Technical Assistance Panel (TAP) Report conducted in October 2011 for the Bowie State MARC Station Development Board.

Next steps include obtaining political consensus on the project's merit; conducting more detailed site and architectural planning studies that further refine the building program, site plan location and integration within the broader development; developing preliminary construction and project costs; outlining the potential operating terms and structure of any public-private partnership; and identifying a potential financing strategy.

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 the key findings from our research and analysis.

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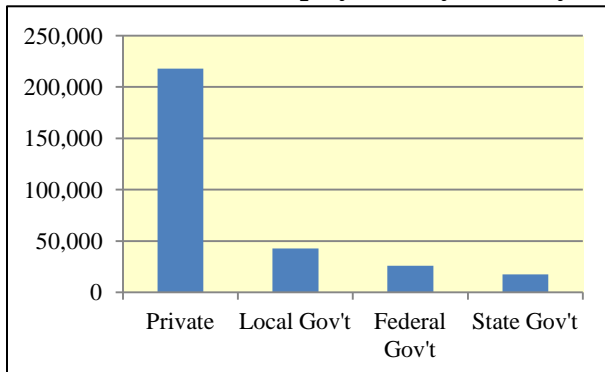
## Economic Analysis

### Overview of Prince George's County

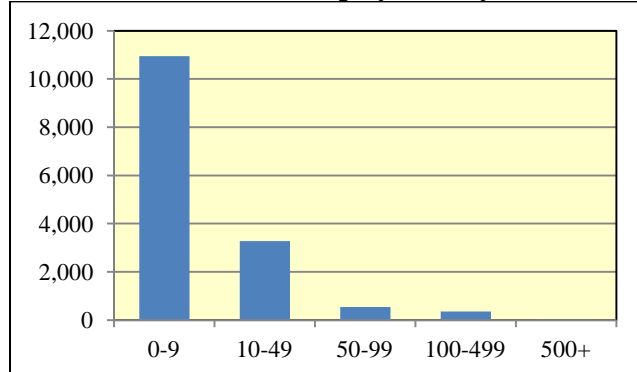
Prince George's County, which wraps around the eastern boundary of Washington, D.C., has a population of more than 863,000 people and a median household income of nearly \$70,000. Population increased by nearly 8% between 2000 and 2010, which was less than that for the State (9%). The median age is approximately 35 years old.

Approximately 15,800 businesses in the County employ nearly 304,000 workers. Major employers 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, Dimensions Healthcare Systems and Gaylord National Resort. 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**



**Distribution of Employment by Size**



Source: Maryland Department of Business & Economic Development.

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.

### Proposed Site Location

The potential site under consideration is part of a 250-acre parcel, including 219 acres of undeveloped County-owned land, that is bordered by the Patuxent Research Refuge to the north, the Potomac Electric Power Company (PEPCO) easement to the west, the City of Bowie border to the south and the Patuxent River to the east. The specific site location for the proposed new Redskins' headquarters is adjacent to a MARC Station and Bowie State.

This broader site, referred to as the Bowie State MARC Station area, has been incorporated in master plans for the Bowie area and Prince George's County. The *2010 Approved Bowie State MARC Station Sector Plan and Sectional Map Amendment*, which was prepared by the M-NCPPC, was connected to the growth of the City of Bowie, the development at Bowie State, and the establishment of the Patuxent Research Refuge.

Bowie State is an integral part of the overall development plan. Founded in 1865, Bowie State is a member institution of the University System of Maryland dedicated to the advancement of knowledge through teaching, research, and service. It is the oldest Historically Black College/University in Maryland and one of the ten oldest in the country. More than 5,600 students were enrolled at Bowie State in Fall 2011. In addition to its 23 undergraduate majors, Bowie State offers more than 30 master's, doctoral and advanced certification programs with a specific focus on science, technology, business, education and related disciplines. Several new facilities have been built on Bowie State's campus over the last ten years including the \$21 million Center for Business and Graduate Studies (2007) and the \$11.8 million Computer Science Building (2002). In addition, a \$71 million Fine and Performing Arts Center opened in January 2012.

Relative to athletics, Bowie State hosts five fall sports (including football, women's bowling, volleyball and men's and women's cross country) four winter sports (including men's and women's basketball and indoor track) and four spring sports (including softball, women's tennis as well as men's and women's outdoor track). Bowie State has a variety of facilities used in the course of intercollegiate athletic competition.

Opened in 1973, the Leonidas James Physical Education Complex, home to the Athletic Department offices, accommodates students enrolled in physical education courses, as well as indoor intramural sports and intercollegiate athletic activities of Bowie State. This facility features a triple-court gymnasium and exercise room, eight racquetball /handball courts, and an eight-lane, 25-yard swimming pool. The A.C. Jordan Arena can accommodate 2,200 spectators.

The Bowie State MARC Station Sector Plan focuses new development on a 119-acre portion of the site that is envisioned to consist of a new "community center". The overall vision for the plan is *"a close-knit community consisting of many diverse residential neighborhoods, an expanded and improved world class educational institution at Bowie State, and high-quality office and research facilities, all oriented around a vibrant and active community center."*

Goals of the Bowie State MARC Station Sector Plan include:

- Promoting a sustainable and economically viable development pattern
- Preserving and enhancing the natural environment and creating a model green Community Center
- Providing a safe, affordable and accessible multi-modal transportation system
- Creating a sense of place

The market assessment conducted as part of the master plan process concluded that three market forces will drive potential demand for the project:

- The current and future demand driven by Bowie State
- Local-serving retail and commercial demand within a one- to three-mile radius
- The potential to leverage the MARC Station as a mass transit opportunity to bring people to the area

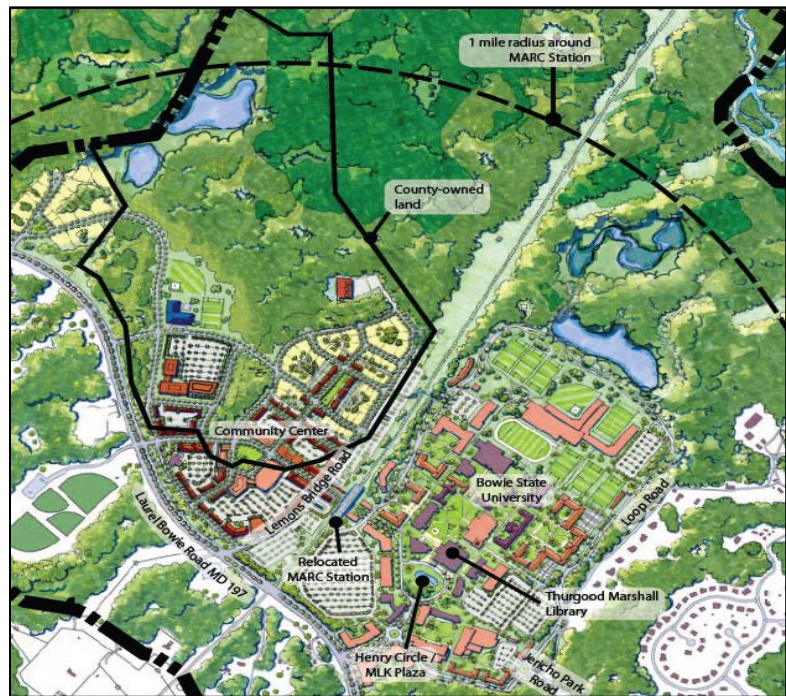
As shown in the graphic that follows, the development program consists of three primary areas:

- Office and Research Campus – office and potential larger footprint institutional uses
- Village Center – mixed use, pedestrian and transit-oriented “core”
- North Village – residential – single family attached and detached

**Site Plan**



**Site Area Relative to Bowie State**



Detailed elements of the proposed development program include:

- 200,000 SF of university flexible space (e.g., classrooms, academic offices, laboratories, etc.)
- 157,500 SF for university graduate and student family housing
- 221,000 SF of multifamily residential
- 75,000 SF university convocation center
- 10,000 SF laboratory school
- 65,000 SF university fitness center
- 55,000 SF of retail including a 20,000 SF grocery store



- 195,000 SF of office space
- 12 live-work townhouses
- 106,250 SF for age qualified/assisted living facility
- 184 townhouses
- 136 small and 87 large single-family lots

Transportation to the site includes Metrobus service, the Bowie State MARC Station, and the following roadways: MD 197 (Laurel-Bowie Road), Race Track Road, Jericho Park Road, as well as Lemon's Bridge Road, Old Jericho Park Road, and Old Laurel-Bowie Road.

The Bowie State MARC Station Development Board was established in February 2011 to help implement the recommendations outlined in the *2010 Approved Bowie State MARC Station Sector Plan and Sectional Map Amendment*. This Board consists of 13 members who are appointed by the Prince George's County Council. Primary responsibilities include crafting recommendations for the future of the County-owned land, refining the development and phasing program proposed by the approved sector plan, and identifying potential funding sources and implementation strategies. The Board's efforts will also support the preparation of a Request for Developer Interest and/or Qualifications.

To assist in formulating its recommendations and assessing the overall economic feasibility of the sector plan's proposed development program, the Board engaged a TAP report from the Urban Land Institute (ULI), Washington District Council. The Board asked the TAP to address several specific questions relative to the development program for the Center, supporting infrastructure, and potential public-private partnerships.

The findings in the ULI TAP Report dated October 17-18, 2011 suggested that the site could be developed with businesses that complement Bowie State programs rather than a transit-oriented development with offices, stores and housing that was initially envisioned by the M-NCPPC. In other words, this site area has an opportunity to serve as a university-oriented regional asset served by transit where Bowie State would be the primary driver of the development project rather than the Bowie MARC station. The ULI panel cited that the bulk of new residential demand, particularly in the short-term, will need to come from enrollment growth at the University which may be better accommodated on the University's land rather than at the proposed site. The study mentioned that there appears to be some limited demand for multi-family and urban-style townhome/starter home product on the site area. This type of development is a good starting point to build interest and help "prove-up" the market within the next five to ten years. Furthermore, the ULI panel did not see significant potential for retail use, except possibly for a restaurant associated with a future hotel.

The ULI planners indicated that a strong partnership is needed between Bowie State, the County and others to identify a "second anchor" tenant which should complement and strengthen Bowie State and generate more demand for the type of retail and housing envisioned in the proposed sector plan. Potential options outlined in the report included a lab school/learning center; conference center/spa/hotel; environmental research facility; and the Washington Redskins' training facility. More specifically, the ULI report cited that the Washington Redskins' training facility would be a viable use for the study area because it would raise the profile of the area and potentially attract more development.

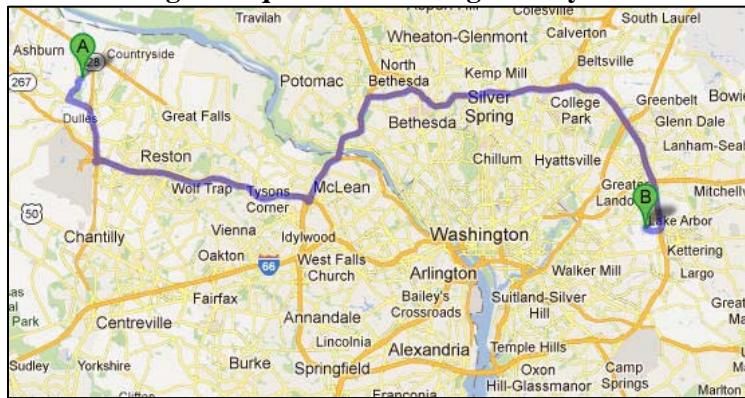


The report stated that this type of facility would provide a complementary use to Bowie State by providing potential practicum and career opportunities for its students as well as additional recreational opportunities if these facilities could be used by students, faculty, and staff. The study also outlined several planning and design considerations, including not relocating the MARC Station from its current location, as well as potential development and implementation strategies.

### Trends in NFL Team Headquarters/Training Facilities

As mentioned previously, two of the driving forces associated with the Redskins' decision to explore alternative locations for its headquarters are its aging facility and the 50-mile distance between its headquarters facility and home field. As a point of reference, the maps that follow illustrate the difference in driving distance between FedEx Field and the existing site of Redskins' headquarters/training facility in Ashburn, Virginia compared to the proposed site in Prince George's County.

**Map - Redskins' Existing Headquarters/Training Facility to FedEx Field (50 miles)**



**Map – Proposed Site in Prince George's County to FedEx Field (15 miles)**



The following table lists the location of each NFL team's headquarters, training camp, and stadium. As shown, the Redskins' headquarters is located the furthest from their stadium relative to other NFL teams. The average distance for all teams is 13 miles. In addition, 17 of 32 teams (53%) conduct their training camp at the team headquarters/training facility. Recent changes relative to the work rules in the 2011 NFL Collective Bargaining Agreement, such as limiting the total number of hours a player can be on the field per day in training camp, suggest that more teams may seek to consolidate their team headquarters/training facility and training camp.

## Summary of NFL Team Headquarters, Training Camp and Stadium Locations

Team	Team Headquarters (HQ)	Training Camp		Stadium		Distance to HQ
		Site	Location	Name	Location	
Arizona Cardinals	Tempe, AZ	Northern Arizona University	Flagstaff, AZ	University of Phoenix Stadium	Glendale, AZ	31
Atlanta Falcons	Flowery Branch, GA	Atlanta Falcons Training Facility	Flowery Branch, GA	Georgia Dome	Atlanta, GA	45
Baltimore Ravens	Owings Mills, MD	Baltimore Ravens Training Facility	Owings Mills, MD	M&T Bank Stadium	Baltimore, MD	20
Buffalo Bills	Orchard Park, NY	St. John Fisher College	Pittsford, NY	Ralph Wilson Stadium	Orchard Park, NY	0
Carolina Panthers	Charlotte, NC	Wofford College	Spartanburg, SC	Bank of America Stadium	Charlotte, NC	0
Chicago Bears	Lake Forest, IL	Olivet Nazarene University	Bourbonnais, IL	Soldier Field	Chicago, IL	37
Cincinnati Bengals	Cincinnati, OH	Georgetown College	Georgetown, KY	Paul Brown Stadium	Cincinnati, OH	0
Cleveland Browns	Berea, OH	Cleveland Browns Training Facility	Berea, OH	Cleveland Browns Stadium	Cleveland, OH	16
Dallas Cowboys	Irving, TX	Alamodome	San Antonio, TX	Cowboys Stadium	Arlington, TX	20
Denver Broncos	Englewood, CO	and Oxnard River Ridge	Oxnard, CA	Sports Authority at Mile High	Denver, CO	18
Detroit Lions	Allen Park, MI	Paul D. Bowlen Memorial Broncos Centre	Englewood, CO	Ford Field	Detroit, MI	12
Green Bay Packers	Green Bay, WI	Detroit Lions Training Facility	Allen Park, MI	Lambeau Field	Green Bay, WI	0
Houston Texans	Houston, TX	St. Norbert College	De Pere, WI	Reliant Stadium	Houston, TX	0
Indianapolis Colts	Indianapolis, IN	Methodist Training Center	Houston, TX	Lucas Oil Stadium	Indianapolis, IN	11
Jacksonville Jaguars	Jacksonville, FL	Anderson University	Anderson, IN	EverBank Field	Jacksonville, FL	0
Kansas City Chiefs	Kansas City, MO	EverBank Field	Jacksonville, FL	Arrowhead Stadium	Kansas City, MO	0
Miami Dolphins	Davie, FL	Missouri Western State University	St. Joseph, MO	Sun Life Stadium	Miami Gardens, FL	10
Minnesota Vikings	Eden Prairie, MN	Miami Dolphins Training Facility	Davie, FL	Mall of America Field at Hubert H. Humphrey Metrodome	Minneapolis, MN	17
New England Patriots	Foxborough, MA	Minnesota State University, Mankato	Mankato, MN	Gillette Stadium	Foxborough, MA	0
New Orleans Saints	Metairie, LA	Gillette Stadium	Foxboro, MA	Mercedes-Benz Superdome	New Orleans, LA	7
New York Giants	East Rutherford, NJ	New Orleans Saints Training Facility	Metairie, LA	Met Life Field	East Rutherford, NJ	3
New York Jets	Florham Park, NJ	University at Albany	Albany, NY	Met Life Field	East Rutherford, NJ	30
Oakland Raiders	Alameda, CA	SUNY Cortland	Cortland, NY	Oakland-Alameda County Coliseum	Oakland, CA	5
Philadelphia Eagles	Philadelphia, PA	Napa Valley Marriott	Napa Valley, CA	Lincoln Financial Field	Philadelphia, PA	0
Pittsburgh Steelers	Pittsburgh, PA	Lehigh University	Bethlehem, PA	Heinz Field	Pittsburgh, PA	1
San Diego Chargers	San Diego, CA	Saint Vincent College	Latrobe, PA	Qualcomm Stadium	San Diego, CA	4
San Francisco 49ers	Santa Clara, CA	Chargers Park	San Diego, CA	Candlestick Park	San Francisco, CA	39
Seattle Seahawks	Renton, WA	Marie P. DeBartolo Sports Center	Santa Clara, CA	CenturyLink Field	Seattle, WA	13
St. Louis Rams	Earth City, MO	Virginia Mason Athletic Center	Renton, WA	Edward Jones Dome	St. Louis, MO	20
Tampa Bay Buccaneers	Tampa, FL	Russell Training Center	Earth City, MO	Raymond James Stadium	Tampa, FL	0
Tennessee Titans	Nashville, TN	One Buccaneer Place	Tampa, FL	LP Field	Nashville, TN	5
Washington Redskins	Ashburn, VA	Baptist Sports Park	Nashville, TN	FedEx Field	Landover, MD	50
		Redskins Park	Ashburn, VA			

Notes:

Sorted in alphabetical order by team.

17 of 32 NFL teams have training camp at their team headquarters which are shown in italics.

Some training camp locations shown above were impacted by the 2011 NFL lockout.

Distances shown between team headquarters and stadium are approximate.

Sources:

NFL.com; Sports Business Journal Resource Guide & Fact Book; individual team websites; other secondary research.

## Select Case Studies

Representatives from the Redskins indicated that they would like to pattern any new team headquarters/training facility after those that the Tampa Bay Bucs and New York Jets currently utilize. Details related to the Redskins' desired building program requirements are included later in this report. As such, this section summarizes key aspects of those two facilities as well as the Ravens' facility which is located in Owings Mills.



**One Buc Place - Tampa Bay Buccaneers**

The Buccaneers' team headquarters, known as One Buc Place, opened in August 2006 and is located across the street from Raymond James Stadium where the team has played its home games since 1998. One Buc Place encompasses 33 acres and has three, full-length grass practice fields, a 145,000 SF facility with a fully-equipped kitchen and dining room, theater-style auditorium, offices, meeting rooms, press conference studio, and hydrotherapy room with multiple pools, as well as a 10,000 SF weight room and 7,000 SF locker room. One of the advantages to the facility's design is that there are separate entrances for visitors and football personnel.

The key design element is a five-story glass and steel football at the facility's entrance. The lobby area also includes an exhibit area called "Moment of Victory" that houses life-size statues of several important figures from the Bucs 2002 Championship season including players and then head coach Jon Gruden.

One Buc Place was privately funded by the team at an estimated cost of between \$30 and \$35 million. The team purchased an 80-acre parcel of land (which used to house a shopping mall) where it later built the Bucs' practice facility and associated parking. Although approximately \$13 million for a practice facility was included in the original bond issue as part of the stadium construction project in the 1990s, the team and the Tampa Sports Authority could not come to an agreement on terms including land ownership. By owning the land, the team would be able to recoup the appreciation if/when they sold the team and/or the land.

For much of the team's existence, the Bucs held training camp on the University of Tampa campus, then at the expansive and better-equipped Disney's Wide World of Sports Complex near Orlando from 2002 to 2008. In 2009, the team began holding training camp at One Bucs Place.

Opened in 1998, Raymond James Stadium is owned and managed by the Tampa Sports Authority. The stadium has a total capacity of nearly 66,000 which can be expanded to 75,000 for special events such as the Super Bowl. The \$168.5 million stadium was paid for by voter referendum. The majority of funds came from State sales tax and a community investment tax and the remainder (approximately 8%) was funded by a half-penny rebate and tourist development tax.



### **Atlantic Health Jets Training Center - New York Jets**

The New York Jets team headquarters and Atlantic Health Jets Training Center are located on a 27-acre site at the Green at Florham Park which is a 268-acre master planned development located on the site of the former ExxonMobil Research Center. In addition to the team's headquarters and Atlantic Health Jets Training Center, the broader master plan for the Green at Florham Park calls for a 325,000 SF office building to house BASF's North American headquarters; three additional Class A office buildings ranging in size from 100,000 SF to 300,000 SF; a 250-room hotel with a 75,000 SF full-service sports club and high end spa, as well as a 425-unit active adult residential community.

Completed in 2008 at an estimated cost of \$75 million, the 120,000 SF state-of-the-art training, teaching, and medical facility, contains corporate offices, training rooms, a 5,500 SF locker room, an 11,000 SF weight room, media facilities as well as one full size indoor practice field and four outdoor practice fields (one artificial and three natural grass). There are 10 classrooms for the players in addition to two individual study rooms and a 160-seat auditorium. The building is fully networked with state-of-the-art video technology for coaching playback and analysis, high-definition videoconferencing and television broadcasts. Similar to One Buc Place, there are two main entrances at the facility – one for football personnel and one for business people and visitors. In addition, there are two dining halls that are serviced by a full kitchen. There is also a terrace that overlooks the outdoor training camp field which can be used as a business entertainment area. The facility has 320 parking spaces as well as 8,000 SF of storage space. The team funded the facility and the naming rights agreement with Atlantic Health is for a 12-year term.

In 2009, the Jets moved their training camp to SUNY Cortland. In order to host the Jets summer camp, SUNY Cortland made several capital improvements to its facilities, part of which was funded by New York State's Empire State Development. Sources estimate that the team's training camp drew 34,000 fans and generated \$4.3 million in economic impact in 2009 and attracted 41,000 spectators that produced \$4.7 million in economic activity in 2010.

Although the team held its training camp at Atlantic Health Training Center in 2011 because of the NFL lockout, the Jets plan to return to Cortland for training camp in 2012 and 2013 fulfilling the terms of their agreement with SUNY Cortland.

Opened in 2010 at an estimated cost of \$1.6 billion, MetLife Stadium is home to the New York Jets and New York Giants. The stadium, which was privately financed by the team, has a seating capacity of 82,500 for football and 90,000 for non-football major events. MetLife Stadium has 222 suites, 10,000 club seats, four clubs, and more than 28,000 parking spaces. In its first year, the stadium hosted 20 NFL games, nine concerts, three college football games, three international soccer matches, and an NCAA lacrosse event. More than two million fans are expected to attend events at the stadium each year. The facility will host Super Bowl XLVIII in 2014.





### **Baltimore Ravens**

The Baltimore Ravens' 200,000 SF training facility features a brick and stone exterior. Located on 32 acres, the team headquarters, outdoor practice fields and field house were completed in October 2004 at a cost of \$31 million which was financed by the team. The field house is 90,000 SF and includes a strength-training area and a full-size indoor practice field. The facility includes a full-service kitchen, cafeteria, player support functions, basketball and racquetball courts and TV studio, plus state-of-the-art requirements for NFL training. There are executive offices, meeting rooms, media areas, three outdoor fields in addition to the field house. Approximately 200 Ravens employees are housed at the Owings Mills headquarters. The ticket office and stadium staff remain at M&T Bank Stadium.

Prior to 2011, the Baltimore Ravens held training camp at McDaniel College in Westminster, Maryland. Last summer, the Ravens held training camp at its Owings Mills facility, a decision that was necessitated by the NFL lockout. In addition, the team recently announced that it will host future training camps at its Owings Mills facility for logistical reasons. From a football perspective, the Ravens cited that hosting training camp at its facility was more conducive to maximizing practice time, particularly in bad weather. The team's state-of-the-art weight room, conditioning machines and medical/training areas are also better. In addition, the team indicated that they had outgrown the Best Western Hotel in Westminster both physically and technologically.

The team's agreement with Baltimore County only allows for a limited number of fans to watch practice at the Owings Mills facility based on the available parking spots and the surrounding road infrastructure which cannot handle the volume of traffic that training camp generates. However, team officials have commented that they are exploring ways to make the team more accessible during training camp by perhaps holding practices at different locations such as M&T Bank Stadium and/or Navy-Marine Corps Memorial Stadium in Annapolis. Westminster officials estimated that training camp, which drew approximately 100,000 fans annually, generated more than \$2 million in economic impact.

Completed in 1998 at an estimated cost of \$220 million, M&T Bank Stadium is located in downtown Baltimore adjacent to Oriole Park at Camden Yards. The stadium is funded through a combination of proceeds generated from the sale of tax-exempt revenue bonds, debt service paid by lottery proceeds and the Ravens. The State of Maryland owns and operates the stadium through the MSA. M&T Bank Stadium has a seating capacity of approximately 72,000 and contains 108 suites and approximately 8,000 club seats. Approximately 4,800 on-site parking spaces are shared between the two stadiums.

## **Economic and Fiscal Impact Estimates**

This section of the report outlines the potential incremental new economic and fiscal benefits associated with the proposed relocation of the Redskins' headquarters/training facility to Prince George's County.

### General Methodology Overview

The methodology used to assess the overall viability of the proposed relocation of the Washington Redskins' team headquarters/training facility from Loudoun County, Virginia to Prince George's County, Maryland from an economic perspective is generally similar to that of any major corporate relocation. However, the total annual payroll of the organization (approximately \$120 million based on information provided by the team), particularly relative to the number of employees, as well as the significant amount of media exposure and prestige associated with this specific entity are unique.

The team employs approximately 210 total players, coaches, trainers, and front office staff, approximately 120 of which are currently based at the existing headquarters in Ashburn with the remaining people working at FedEx Field in Landover. The proposed relocation of all operations to Prince George's County, and particularly the incremental influx of players and front office salaries, would spur additional spending, earnings and employment in the County and the State. Because FedEx Field is located in Prince George's County, this analysis does not estimate any economic or fiscal benefits associated with stadium operations. In addition, adjustments are made to total team salaries to account for the fact that some employees already reside in the County and/or the State.

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. As such, 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 the team's relocated operations.

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 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.

In order to quantify total output, 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 local area and the State resulting from incremental new team operations.

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 relocation of the team's headquarters/training facility. 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 relocation of the team's headquarters/training facility.
- *Personal Earnings* represent the wages and salaries earned by employees of businesses associated with or impacted by relocation of the team's headquarters/training facility.

Again, this analysis makes adjustments to reflect impacts that are estimated to be incremental new to the County and the State. In addition, this analysis does not specifically account for any potential substitution effect which relates to the fact that some portion of spending generated by the team's relocation may have otherwise taken place on some other activity in the County and State.

The estimated spending generated from the team's relocation also creates incremental new tax revenues for the County and the State. Although other taxes may also be positively impacted by the team's relocation, this analysis estimates the incremental new revenues generated from State sales and use tax and personal income tax as well as local personal income tax. As an example, team personnel who purchase homes would generate additional property taxes at the County level. Furthermore, it is assumed that all tax rates remain at their current levels.

#### Relocation of Redskins' Headquarters/Training Facility

The table that follows summarizes the estimated incremental new economic and fiscal impacts generated by relocation of the team's headquarters/training facility to Prince George's County for three different scenarios. It is important to recognize that as the player salary cap and other front office salaries increase, so will the associated economic and fiscal benefits.

Summary of Estimated Incremental Economic and Fiscal Impacts Redskins' Headquarters/Training Facility Relocation			
Category	Sensitivity Analysis Range		
	Scenario 1	Scenario 2	Scenario 3
<b>Economic Impacts</b>			
Spending			
Direct	\$45,480,000	\$39,805,000	\$34,130,000
Indirect/Induced	25,890,000	22,659,000	19,430,000
Total	\$71,370,000	\$62,464,000	\$53,560,000
Total Jobs	870	760	650
Total Earnings	\$67,338,000	\$58,936,000	\$50,534,000
<b>Fiscal Impacts</b>			
State Personal Income Tax	\$4,822,000	\$4,220,000	\$3,619,000
State Sales and Use Tax	856,000	752,000	643,000
Subtotal	\$5,678,000	\$4,972,000	\$4,262,000
Local Personal Income Tax	\$995,000	\$870,000	\$746,000
Local Property Tax	TBD	TBD	TBD
<b>Total Fiscal Benefits</b>	<b>\$6,673,000</b>	<b>\$5,842,000</b>	<b>\$5,008,000</b>

Notes: TBD denotes "to be determined".

Amounts are in current dollars and reflect a single year of operation.

The following summarizes key assumptions used to derive these estimates of economic and fiscal benefits.

#### *Estimated Annual Economic Impacts*

For purposes of this analysis, direct spending relates to the incremental new team salaries assumed to be spent in the County and the State. As mentioned previously, spending associated with FedEx Field operations (e.g., ticket sales, food/beverage and merchandise sales, parking, etc.) is not included in this analysis since it is already occurring in the local and State economies.

Based on information provided by the Redskins, total annual player payroll is estimated to be \$120 million and total annual non-player payroll is estimated to be \$40 million. Maryland personal income tax is based on where you live, not where you work. Currently, the majority of players, coaches, trainers and front office staff reside in Virginia, many within close proximity to Redskins Park. If the team moves its headquarters/training facility to Prince George's County, Redskins' representatives indicated that most players and front office personnel would likely move closer to the new facility given the amount of time they spend there, particularly during the season. This general propensity for personnel to reside relatively close to the team's headquarters/training facility, mostly during the season, was also mentioned in conversations with representatives from other NFL teams. For purposes of this analysis, it is assumed that all team personnel who relocate to Maryland will qualify as residents, generally defined as individuals domiciling in Maryland or maintaining a place of abode in Maryland for more than six months and being physically present in the State for 183 days or more during the taxable year.

Qualifying as a resident is a key assumption in the analysis. Professional athletes are taxed based on "duty days" they spend in each state. Nonresident professional athletes are required to allocate their income from Maryland sources based on a formula related to "duty days" which means all days during the taxable year from the beginning of the professional athletic team's official pre-season training period through the last game in which the team competes or is scheduled to compete. Duty days include days on which a member of a professional athletic team renders a service (e.g., conducting training and

rehabilitation activities at the team facility) as well as game days, practice days, days spent at team meetings, promotional caravans and pre-season training camps, as well as days served with the team through all post-season games. The number of duty days may vary in any given year based on the transition of players among teams, injuries, suspensions, etc. However, although nonresident professional athletes are subject to tax on their income derived from compensation for services rendered in Maryland, residents of Virginia, Pennsylvania, West Virginia and Washington D.C. who only earn wages in Maryland are exempt from income and withholding tax under a reciprocal tax agreement.

Based on team personnel requirements during minicamp, preseason training camp, regular season, and postseason including any game days, practice days, days spent at team meetings, rehabilitation activities conducted at team facilities, promotional caravans, etc., it appears reasonable to assume that team personnel who live in Maryland will meet the residency criteria.

Because some team personnel who do not currently reside in Maryland may choose not to move to the State if the team relocates, a sensitivity analysis was conducted for three scenarios that assume the following percentages of *incremental* new compensation is spent in Maryland:

Summary of Assumptions - Sensitivity Analysis		
Category	% of Incremental New Compensation to Maryland	
	Players	Non-Players
Scenario 1	90%	50%
Scenario 2	80%	40%
Scenario 3	70%	30%

Note: Non-player staff includes front office staff personnel such as the owner, general manager, vice presidents, director of player personnel as well as coaches, trainers, etc.

Given the proximity of the proposed site to other counties such as Anne Arundel, Howard and Montgomery, some team personnel who relocate to Maryland may not choose to live in Prince George's County. For instance, the local personal income tax rate in Anne Arundel County is 2.49% compared to 3.2% in Prince George's County. Based on information from the Maryland Department of Labor, Licensing and Regulation, this analysis assumes that 40% of compensation associated with team personnel who relocate to Maryland will be incremental new to Prince George's County.

In each of the three scenarios, players' salaries were adjusted to account for days during the season that players work outside of Maryland which is not subject to local or State personal income tax. In addition, the analysis assumes that only 40% of the adjusted incremental gross personnel income is spent in the State. This takes into account purchases and payments made to businesses outside Maryland on items such as mortgage payments, insurance, etc.

Based on these assumptions, direct spending related to the team's relocation was estimated to range from \$34.1 million to \$45.5 million annually. Direct spending amounts were assigned logical industry categories and relevant multipliers were then applied to these amounts in order to calculate estimates for total spending, jobs and earnings. Outputs from the IMPLAN model indicate that total (i.e., direct, indirect and induced) spending related to the team's relocation was estimated to range from \$53.6 million to \$71.4 million annually. Dividing the total impacts by the direct impacts yields an economic multiplier of approximately 1.6. Thus, every dollar of direct spending generated \$1.60 in total economic activity.

Based on the IMPLAN model, the economic activity associated with the team's relocation was estimated to support between 650 and 870 total jobs and create between \$50.5 million and \$67.3 million in personal earnings annually.

### *Estimated Annual Fiscal Impacts*

This section outlines key assumptions used to estimate the fiscal benefits associated with the potential relocation of the team's headquarters/training facility. Approximately 85% of the estimated fiscal benefits shown in this analysis occur at the State level. No tax incentives to the private sector are assumed as part of this analysis.

*State Personal Income Tax* – The State 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. Residents of Virginia, Pennsylvania, West Virginia and Washington D.C. who only earn wages in Maryland are exempt from income and withholding tax under a reciprocal tax agreement. Other non-residents are subject to a special nonresident tax rate of 1.25% in addition to the State income tax rate. Tax credits may be available to non-residents who are required to pay income tax in their resident state. Based on information provided by the Comptroller of Maryland, the estimated incremental new taxable personal income generated from team salaries in the State was multiplied by an effective tax rate of 5.5%. Based on these assumptions, State personal income tax associated with the team's relocation was estimated to range from \$3.6 million to \$4.8 million annually.

*State Sales and Use Tax* - The State collects a 6% sales and use tax from sales and leases of tangible personal property and services throughout the State. The sales and use tax rate for the sale of alcoholic beverages is 9%. Based on 2010 taxable sales as a percentage of Maryland's gross state product, this analysis assumes that 20% of total spending is subject to the 6% State sales and use tax which is estimated to generate between \$643,000 and \$856,000 annually and represents a conservative estimate relative to the sale of alcoholic beverages.

*Local Personal Income Tax* – Prince George's County imposes a local personal income tax of 3.2% which is calculated as a percentage of taxable income. Based on information provided by the Comptroller of Maryland, the estimated incremental new taxable personal income generated from team salaries in the County was multiplied by the current tax rate of 3.2%. Based on these assumptions, local personal income tax associated with the team's relocation was estimated to range from \$746,000 to \$995,000 annually.

*Local Property Tax* – All real property located within Prince George's County is subject to taxation, except that which is specifically exempt. Each property is reassessed every three years by the State Department of Assessments and Taxation (SDAT). The property assessment used by Prince George's County represents 100% of full cash value. The real property tax is levied annually on all taxable land and improvements. The tax rate is currently \$1.431 per \$100 of assessed value which includes the following assessments per \$100 of assessed value:

- County rate of \$0.96
- State rate of \$0.1120
- Parks and Planning rate of \$0.2790
- Stormwater/Chesapeake Bay Water Quality rate of \$0.0540
- Washington Suburban Transit Commission rate of \$0.0260

Although no estimate has been prepared for the potential assessed value of the land and improvements associated with this project, approximately \$14,310 in real property taxes could be generated per \$1 million of assessed value, of which approximately \$9,600 (or 67%) would flow directly to the County. As a point of reference, a property with an assessed value of \$50 million would generate approximately \$715,500 in total real property taxes of which \$480,000 would flow directly to the County.

In addition, the County imposes a personal property tax rate of \$2.40 per \$100 assessed value of business owned personal property (e.g., equipment in the building). Although not estimated as part of this analysis, personal property taxes would generate additional benefits to the County.

### *Construction Impacts*

Although not quantified in this analysis, construction costs associated with development of the headquarters/training facility would provide additional economic and fiscal impacts to the County and State during the construction period.

### Training Camp

In addition to the previously stated economic and fiscal impacts associated with the ongoing operations of the proposed new headquarters/training facility, a secondary benefit would result from the operations of the team's training camp which is currently held at Redskins Park in Ashburn, Virginia. The table that follows summarizes the incremental new economic impacts estimated to be generated from hosting the Redskins' training camp at the proposed site location in Prince George's County.

Summary of Estimated Incremental Economic Impacts Redskins' Training Camp in Prince George's County			
Category	Range		
Attendance	100,000	-	110,000
Spending			
Direct	\$2,000,000	-	\$2,200,000
Indirect/Induced	1,109,000	-	1,221,000
Total	\$3,109,000	-	\$3,421,000
Total Jobs	30	-	40
Total Earnings	\$1,204,000	-	\$1,324,000

Note: Amounts are in current dollars and reflect a stabilized year of operation.

Team representatives indicated that training camp, which is free for the public to attend, typically draws between 100,000 and 110,000 fans each year, including approximately 15,000 at the Redskins' Fan Appreciation Day. This analysis assumes similar training camp attendance and an average daily spending amount of \$20 per person on items such as food & beverage, merchandise and transportation. Based on these assumptions, incremental new direct spending associated with training camp was estimated to range from \$2.0 million to \$2.2 million annually. Based in the IMPLAN model, this direct spending was estimated to generate between \$3.1 million and \$3.4 million in total spending which can support between 30 and 40 total jobs and create between \$1.2 million and \$1.3 million in total personal earnings annually.

Furthermore, preliminary estimates suggest that training camp could generate approximately \$225,000 annually in fiscal impacts, the majority of which would occur at the State level from sales and use tax and personal income tax collections.

## Summary

Based on this analysis, the following table summarizes relative advantages and disadvantages associated with the proposed relocation of the Redskins' headquarters/training facility:

Relative Advantages	Relative Disadvantages
<ul style="list-style-type: none"> <li>• Creates significant economic impacts in terms of spending, jobs and earnings as well as fiscal impacts to the County and State annually</li> <li>• Complements and potentially accelerates elements of the proposed Bowie State MARC Station Sector Plan for the site</li> <li>• Enhances local and State image through increased media exposure</li> <li>• Broadens market reach to new visitors</li> <li>• Fosters synergies/relationships with Bowie State such as providing venue for internships or other educational partnerships</li> <li>• Proposed facilities could have alternative re-use options in the long-term</li> <li>• Site can accommodate program and allows for future expansion</li> <li>• Results in cost savings to the team given proximity to FedEx Field</li> </ul>	<ul style="list-style-type: none"> <li>• Given the site location relatively proximate to the County line, a portion of players, coaches, trainers and front office personnel will likely choose to live outside of Prince George's County resulting in less potential personal income tax collections</li> <li>• Vehicular access will need to be improved given anticipated additional traffic flow</li> <li>• Perception that this development will interfere with existing plans for the site outlined in the current Bowie State MARC Station Sector Plan</li> </ul>

Performing an economic analysis and preliminary site planning study is an initial step in the overall planning and decision-making process. Our research and analysis indicates that the potential relocation of the Washington Redskins' team headquarters/training facility would generate significant quantitative and qualitative benefits to both the County and the State making it a viable development project to further evaluate. The project provides a unique opportunity to relocate a high profile organization, ranked by *Forbes Magazine* as the second most valuable NFL franchise among the 32 teams, to Prince George's County as well as to assist in meeting and potentially accelerating broader planning and development objectives including those outlined in the Bowie State MARC Station Sector Plan. The proposed project's compatibility with the Bowie State MARC Station Sector Plan was also noted in the ULI TAP Report conducted in October 2011.

## Preliminary Site Plan Study

The next section of the report is a preliminary site planning analysis prepared by Populous including, but not limited to, a summary of physical planning considerations related to the proposed site, an outline of preliminary program requirements for the new facility, high-level data on comparable facilities as a point of reference as well as conceptual site diagram concepts.



## **Next Steps**

Next steps in the development planning process include, but are not limited to, the following:

- Obtaining political consensus on the project's merit.
- Conducting more detailed site and architectural planning studies that further refine the building program, site plan location and integration within the broader development.
- Developing preliminary construction and project costs.
- Outlining the potential operating terms and structure of any public-private partnership.
- Identifying a potential financing strategy.

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## Introduction

This study explores physical planning considerations for a new Washington Redskins corporate headquarters and training facility in northeastern Prince George's County, Maryland. The planning area for the study, identified by the County, is located within the Bowie State MARC Station Sector Plan.



Anchored by the Bowie State MARC Station and Bowie State University, the study area is comprised of 243.4 acres within the Sector Plan, including 219 acres of land currently owned by the county. The Sector Plan proposes a new 119-acre Community Center, concentrating future mixed use development in the heart of the plan. A new Redskins corporate headquarters is considered complementary to the character and framework of the current plan. Approximately 15 acres of planned uses, within the community center, are needed for the new headquarters site.



The planning process, described by the following exhibits, identifies the Redskins development program, considers comparable benchmark facilities, analyzes the study area in order to identify the most advantageous site location, identifies physical characteristics of the proposed site, and depicts options for site configuration and development.

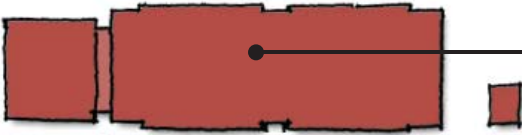






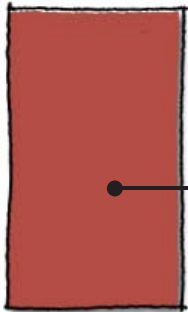


Practice Fields  
 - 1 Synthetic  
 - 3 Natural Grass

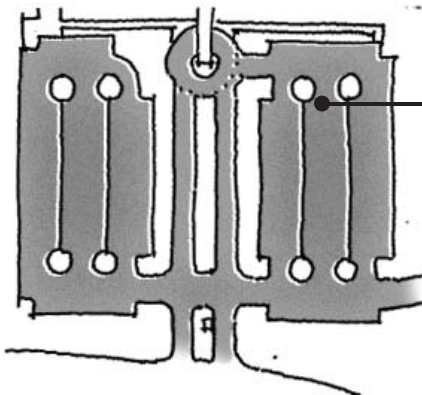


Training Building  
 - 146,600 Square Feet

\* Revenue and Other Public Spaces such as Pre-Function Space, Hall of Fame, VVIP/ Sponsor Lounge, Upgrades to Kitchen/ Commissary and Storage are not included in the above total.



Indoor Practice Field  
 - 96,250 Square Feet



Parking  
 - 150 Team/Administration Spaces  
 - 135 Player Spaces

## NFL Training Facility Specific Program Information:

### Main Entrance/Lobby Area

A. Lobby, Reception, Public Restrooms, Family Restroom	1,850 square feet	
Subtotal		1,850 square feet

### Team Administration

A. Coaches Offices (15)	10,000 square feet	
B. Conference Rooms (6)	2,500 square feet	
C. Football Operations	6,500 square feet	
D. Support	1,000 square feet	
E. Video	4,000 square feet	
Subtotal		24,000 square feet

### Team Facilities

A. Player Space	15,000 square feet	
B. Team Meeting Rooms	13,500 square feet	
C. Coaches Lockers	3,000 square feet	
D. Equipment Room	6,000 square feet	
E. Athletic Training	12,500 square feet	
F. Strength Training	14,500 square feet	
G. Media Facilities	2,500 square feet	
H. Dining Facilities (includes Kitchen)	14,500 square feet	
I. Staff Lockers	1,750 square feet	
Subtotal		83,250 square feet

### Business Operations and Support Facilities

A. Business Operations	36,500 square feet	
B. Support	1,000 square feet	
Subtotal		37,500 square feet

### Revenue and Other Public Spaces

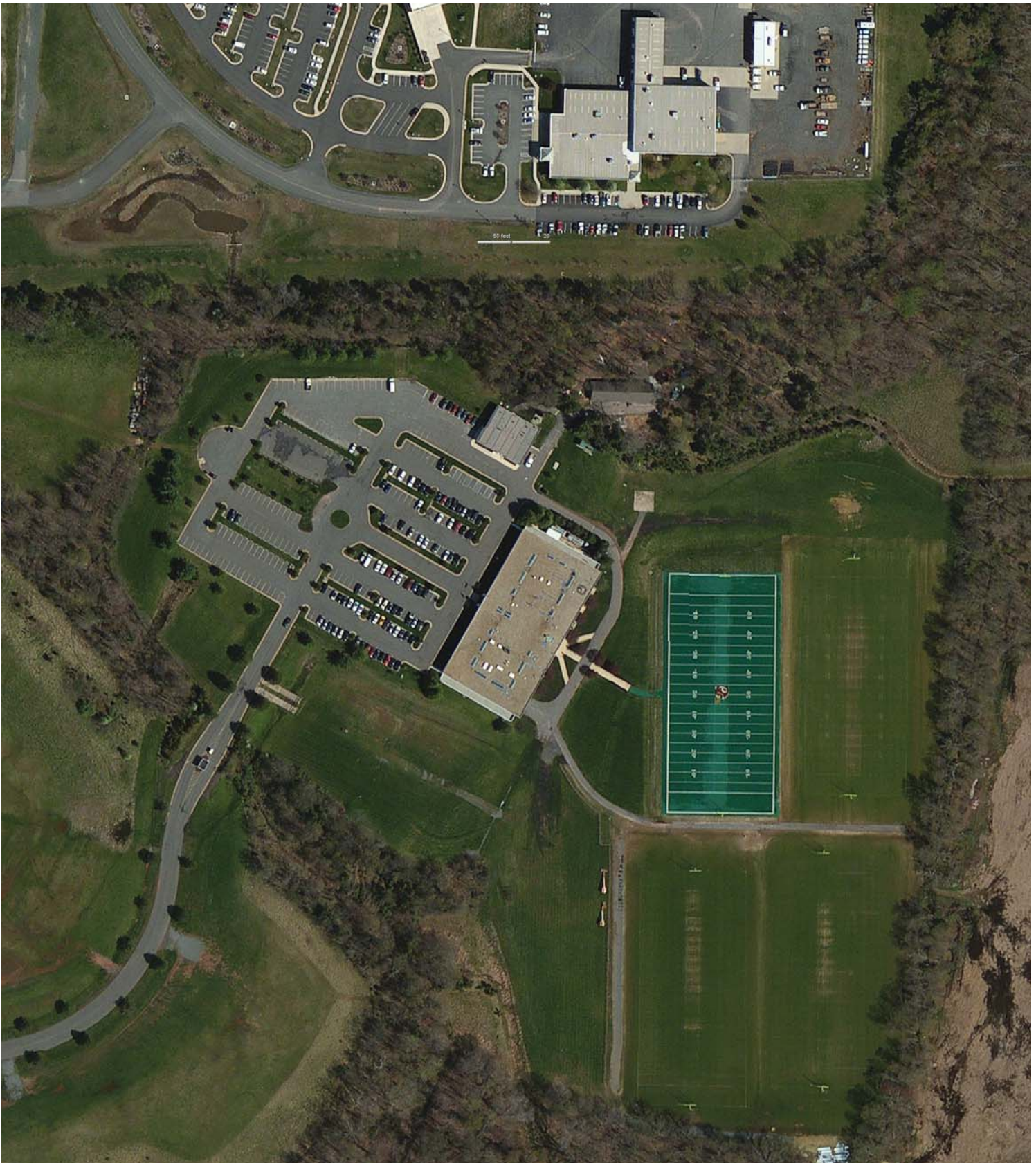
A. Pre-Function Space	TBD	
B. Hall of Fame	TBD	
C. VVIP / Sponsor Lounge	TBD	
D. Upgrades to Kitchen / Commissary	TBD	
E. Storage	TBD	
Subtotal		TBD

### Ancillary Facilities

A. Indoor Practice Facility (100 yd)	92,000 square feet	
B. Separate Storage Building	4,000 square feet	
C. Guard Building at Site Entrance	250 square feet	
Subtotal		96,250 square feet

Total (Excluding Revenue and Other Public Spaces) 242,850 square feet





## Program

- 162 Acres
- 70,000 Square Feet
- 3 Natural Grass Fields, 1 Artificial Surface Field & One Practice Bubble (Under Construction)
- +/- 280 Parking Spaces





## Program

- Completed 2006
- 33 Acres
- 141,000 Square Feet
- 3 Natural Grass Fields
- Discreet Weight Room
- No Indoor Practice Field
- +/- 320 Parking Spaces





## Program

- Completed 2009
- 27 Acres
- 120,000 Square Feet
- 3 Natural Grass Fields, 1 Artificial Surface Field & 1 Indoor Practice Field (Not included in above square footage)
- Indoor Practice Facility

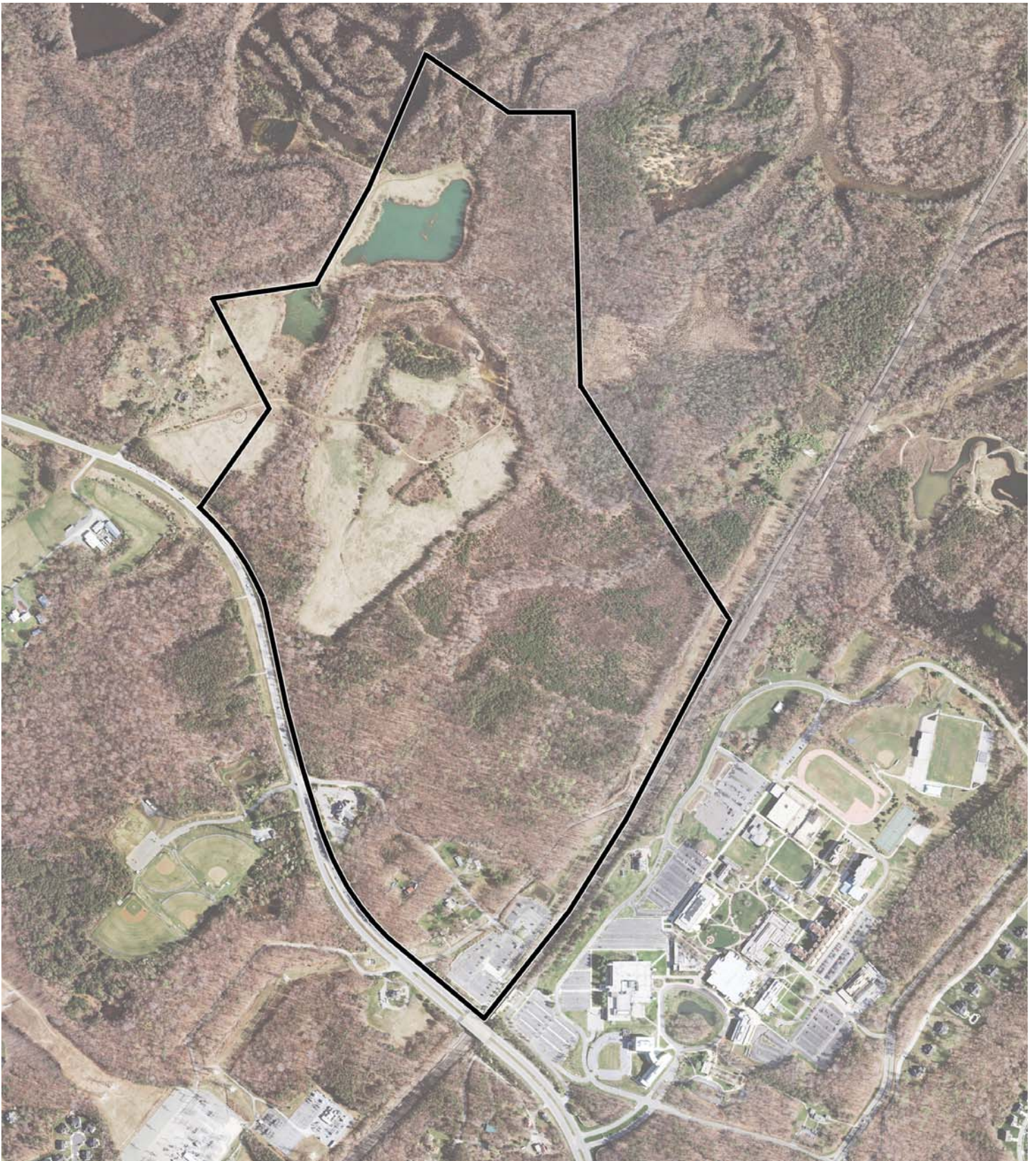




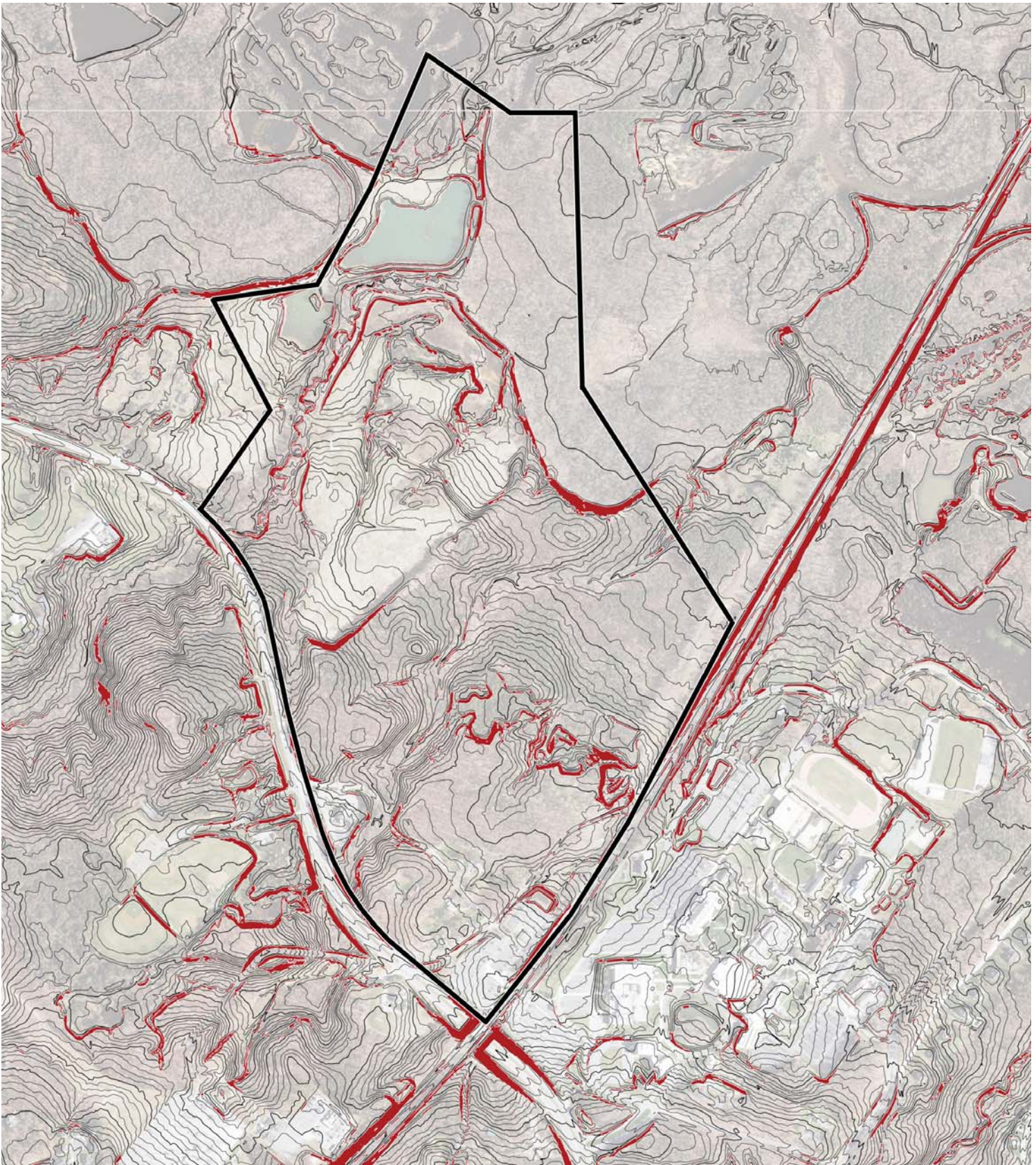
## Analysis

- The study area is comprised of approximately 243.4 acres within the Sector Plan, including 219 acres of land currently owned by the County







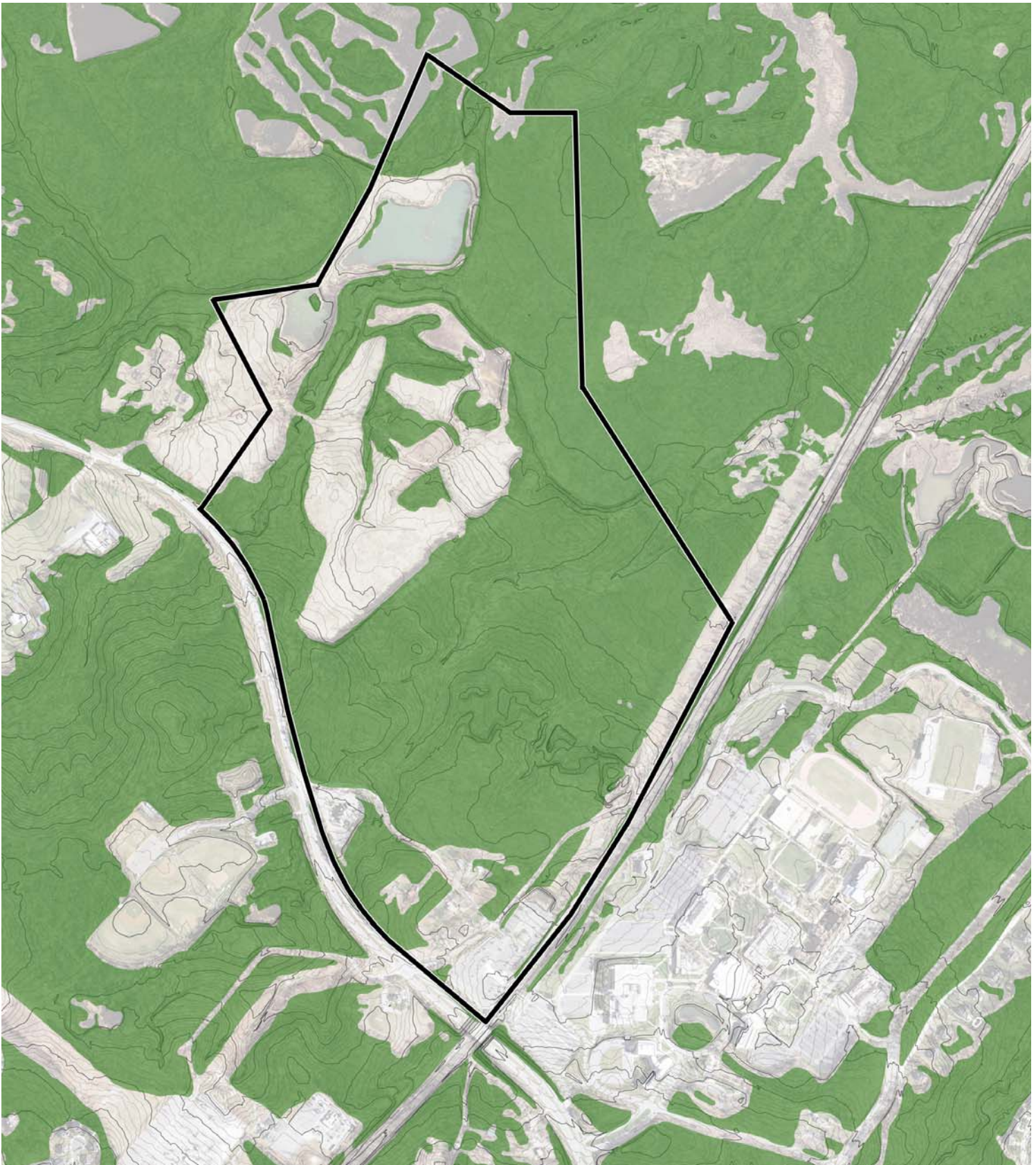


Analysis

- Slopes shown in red are greater than 25% and considered undevelopable



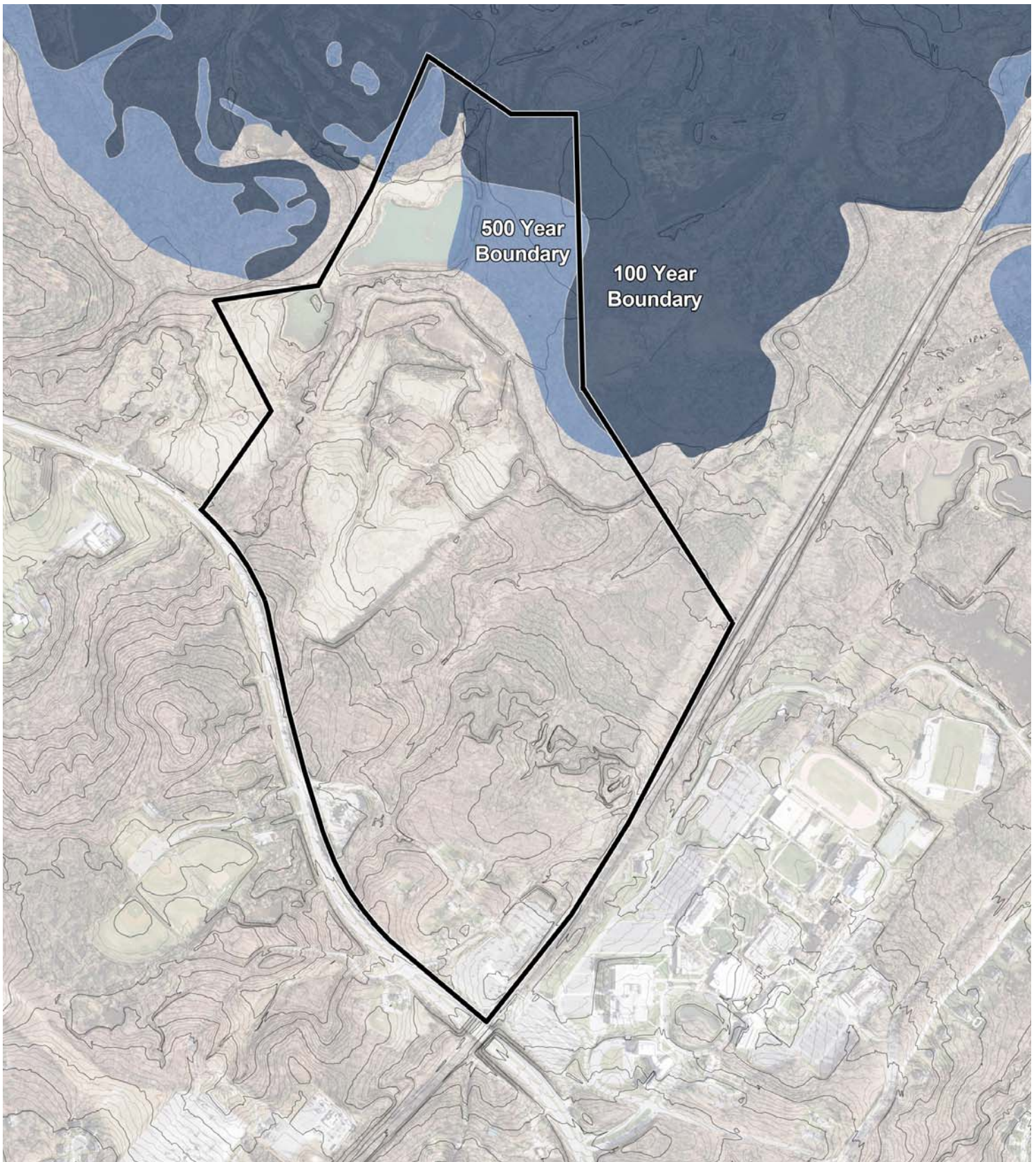




Analysis

- A Signif cant part of the study area has been clear cut

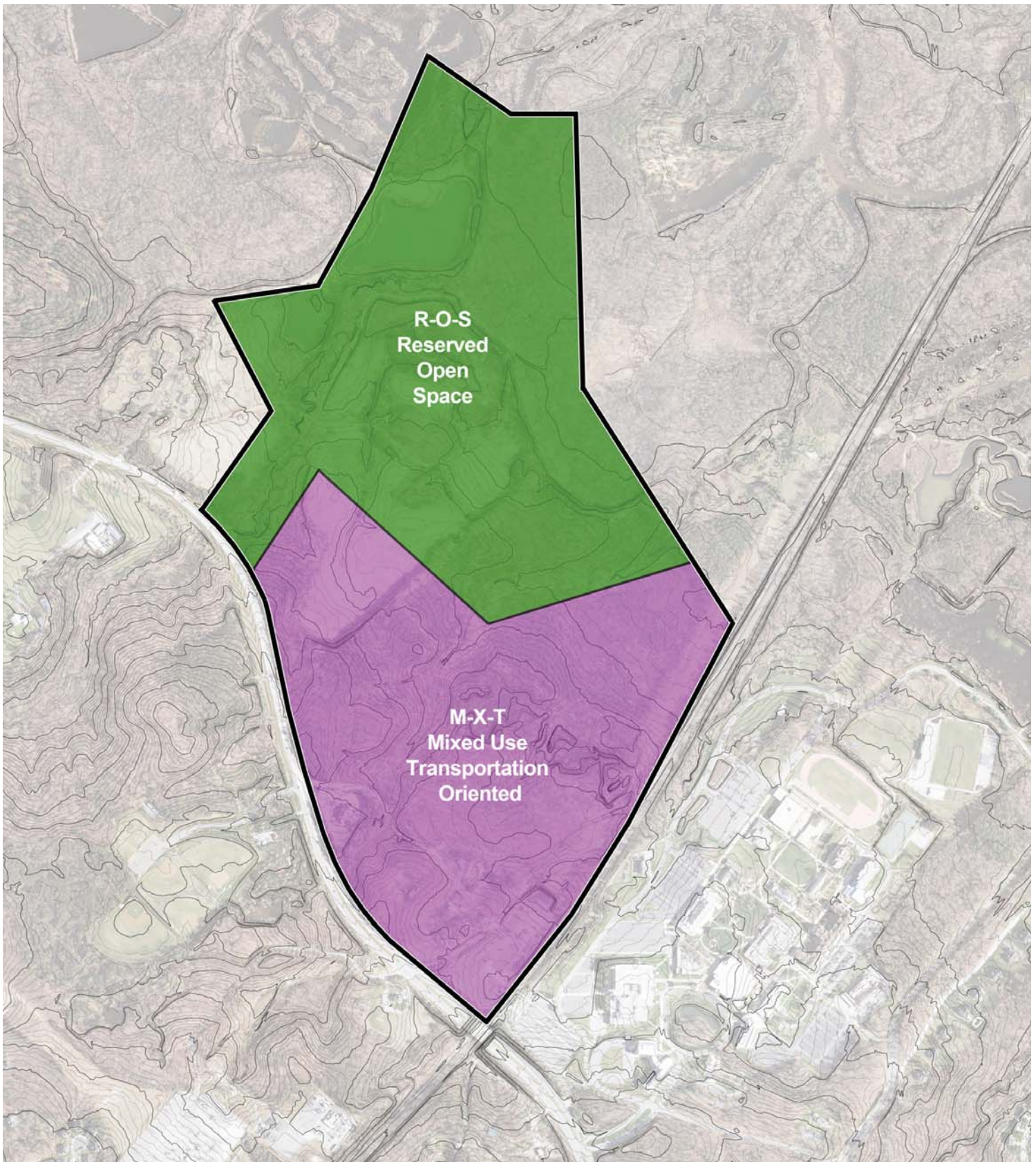




## Analysis

- The study area contains areas of the 100 and 500 year flood plain.

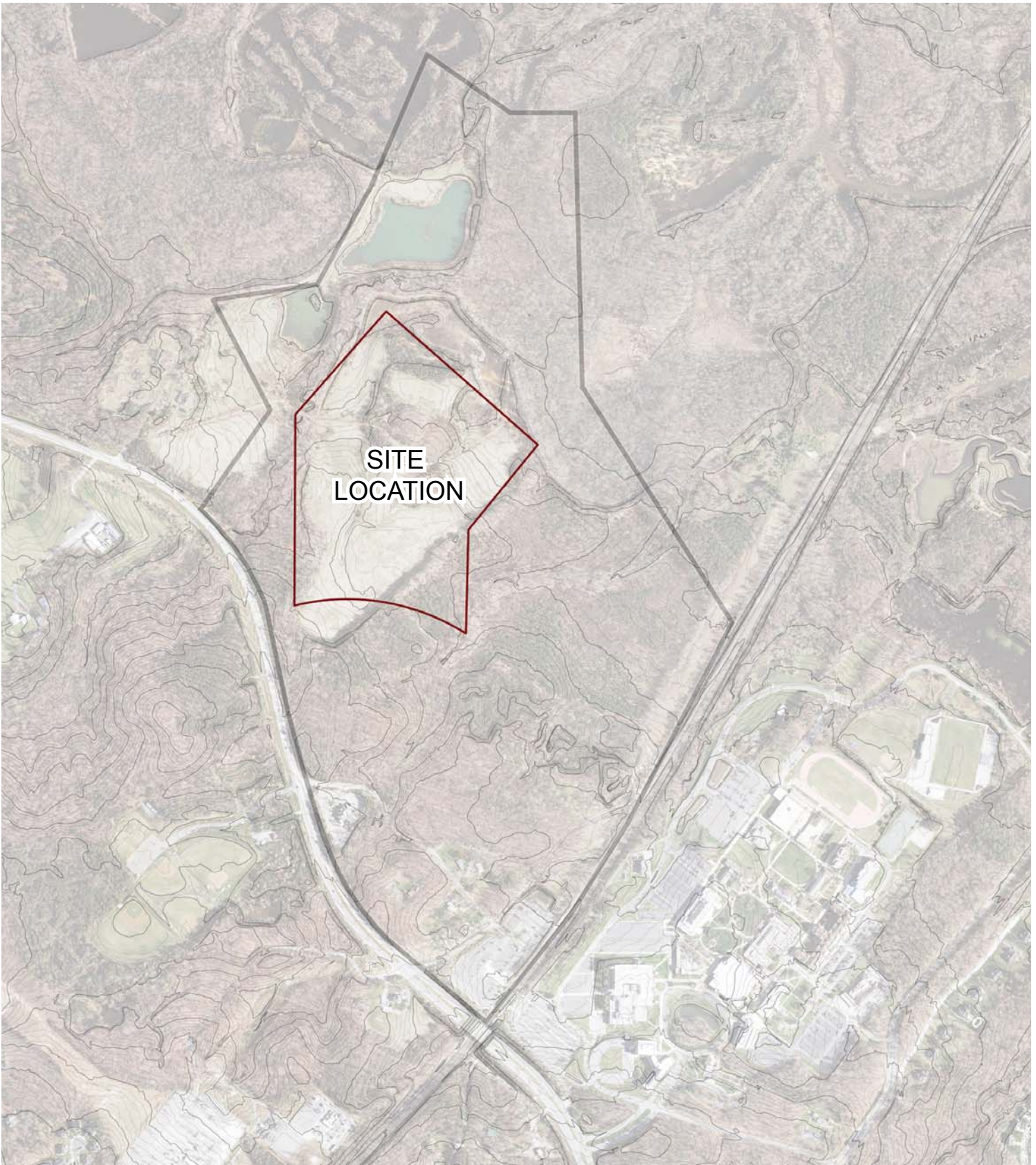




## Analysis

- The study area has two zoning classifications, M-X-T: Mixed Use Transportation Oriented and R-O-S: Reserved Open Space. According to County authorities, part of the R-O-S area is available for the potential Redskins project



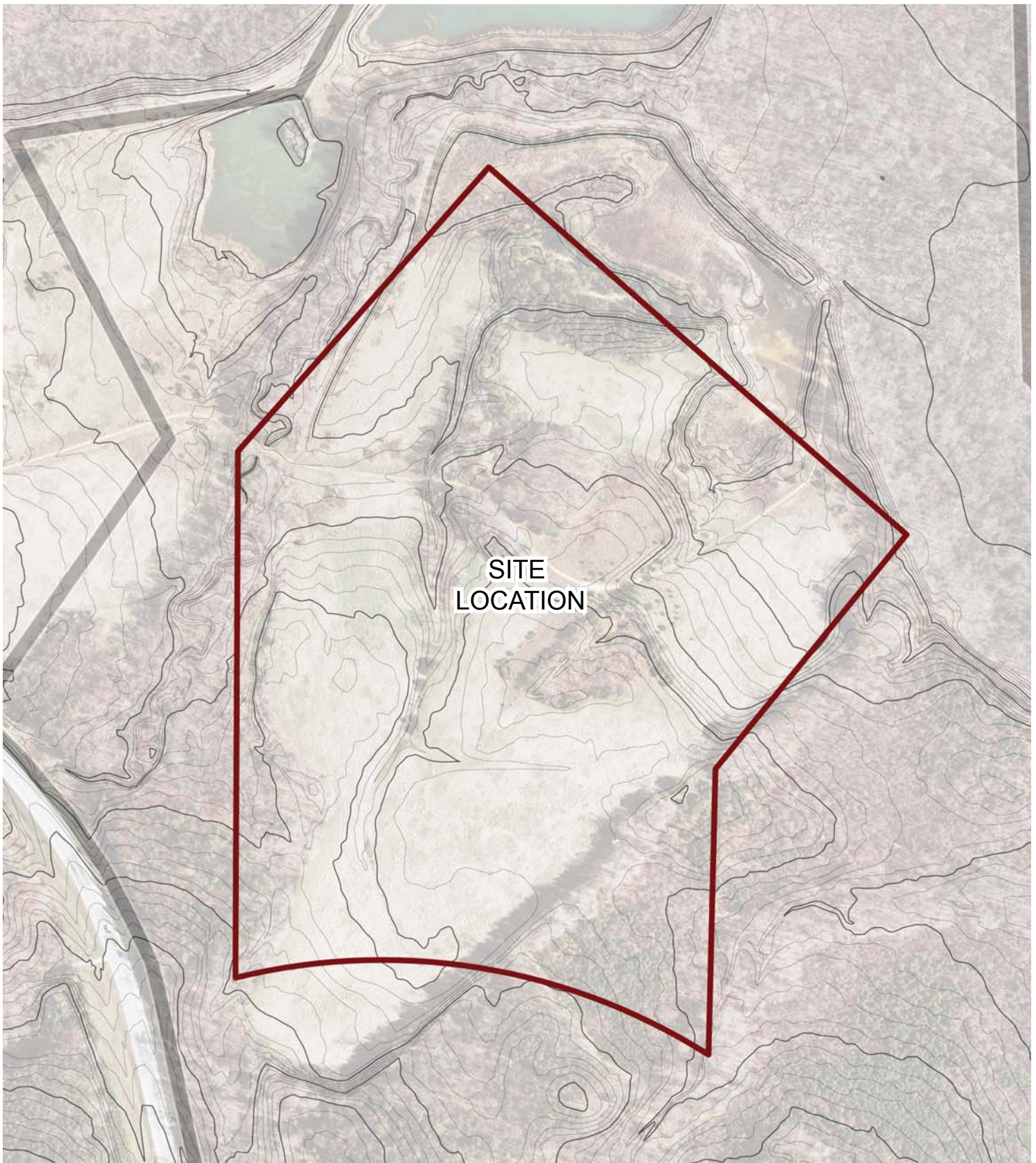


Analysis

- This site is seen as the most advantageous for the Redskins development program.







## Analysis

- This site location is seen as the most advantageous for the Redskins development program.



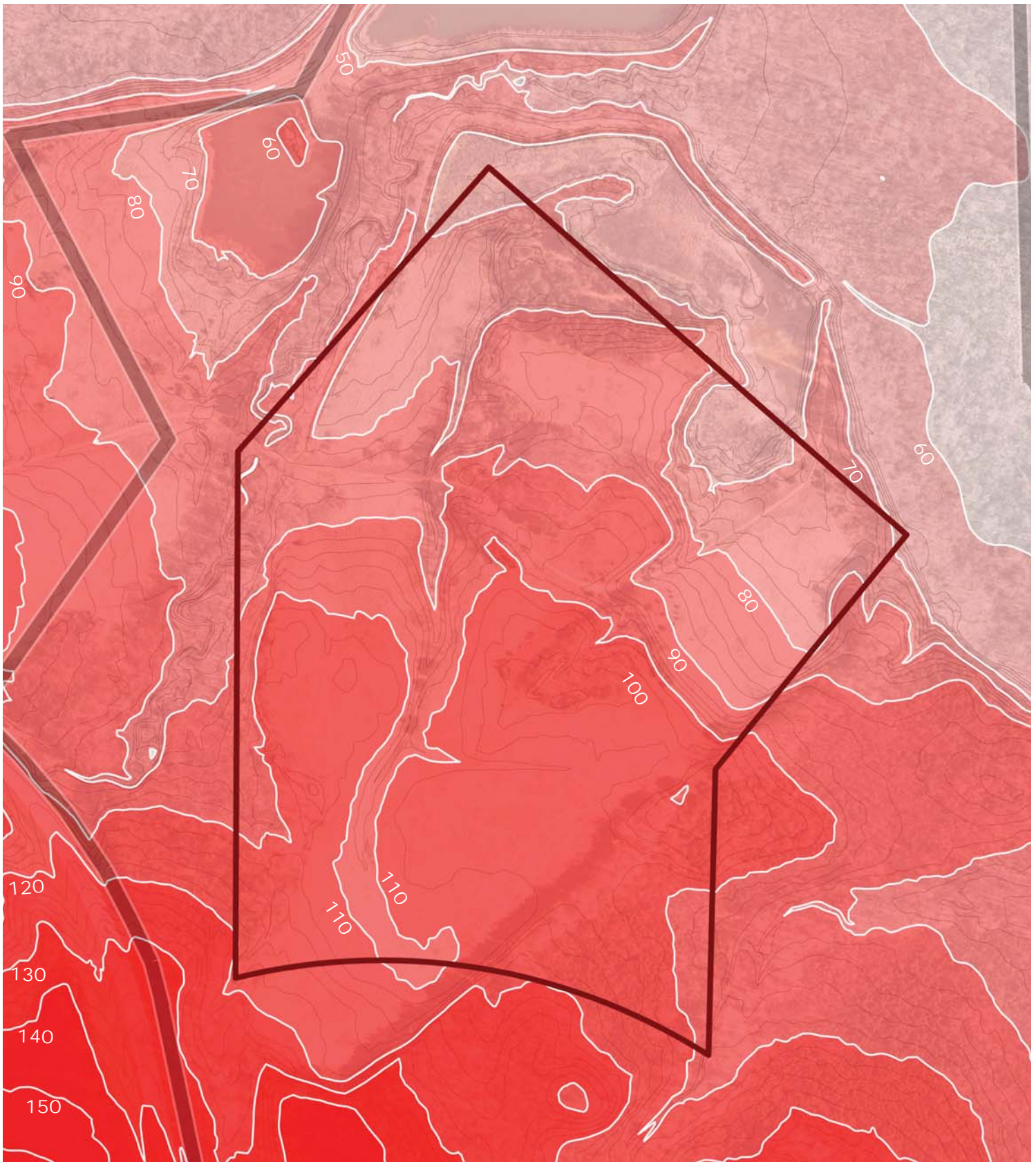


Analysis

- The natural tree line provides a visual screen for the Redskins playing f elds



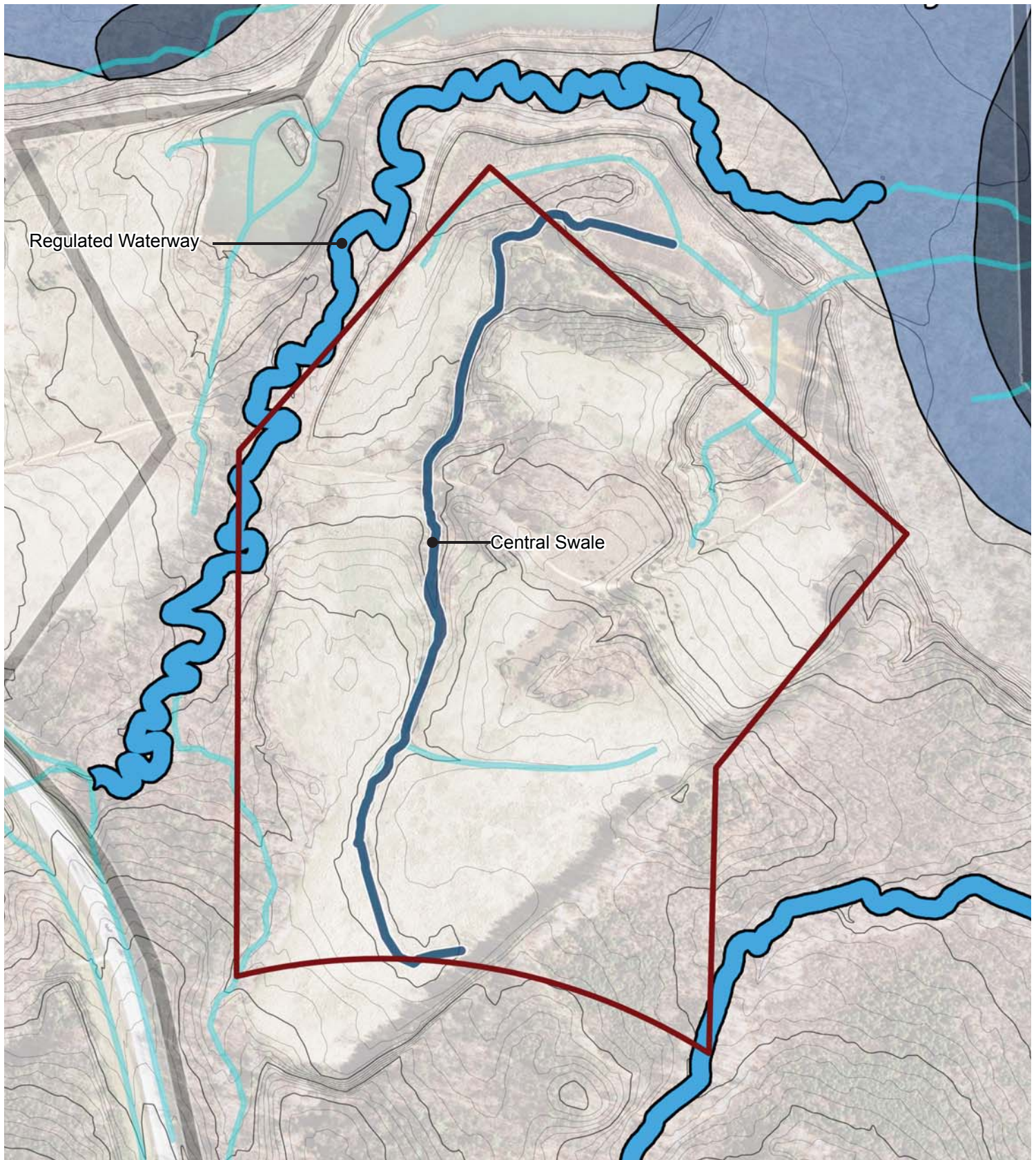




## Analysis

- Topography is least rugged in the proposed site area and can be manipulated to accommodate the Redskins program. Significant earthwork will be required.

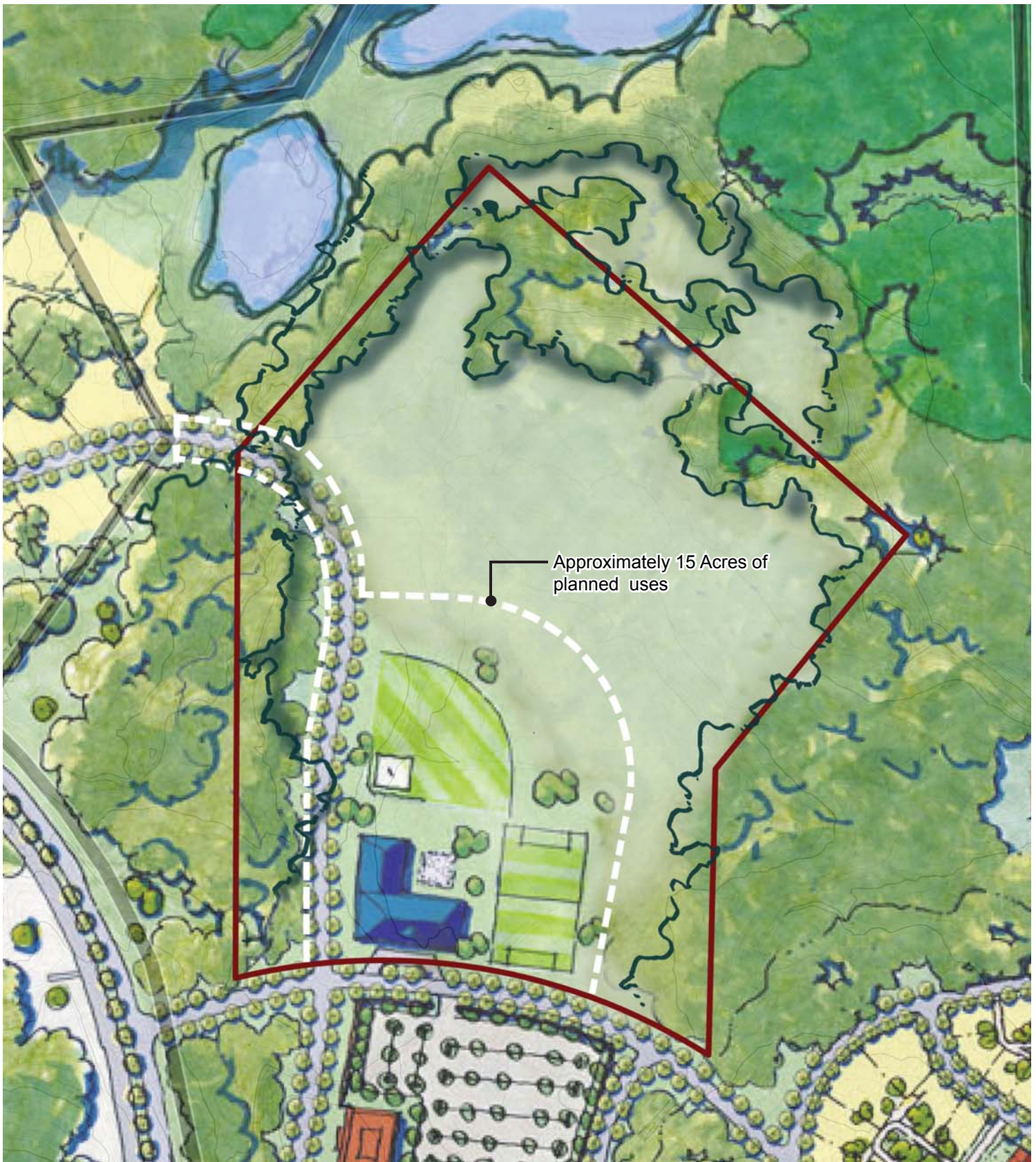




## Analysis

- There are two waterways on the site. The western stream is a regulated waterway.

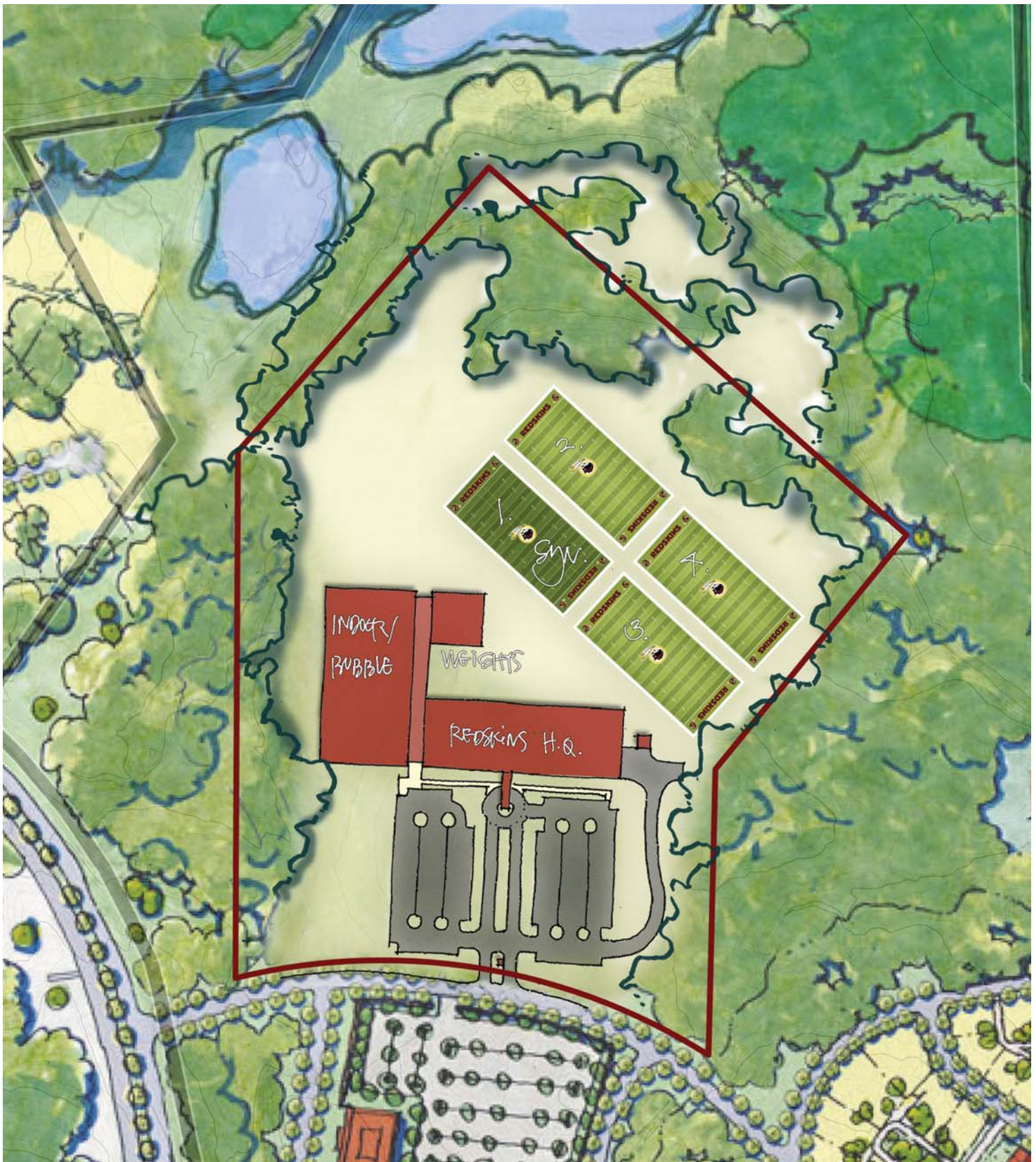




## Analysis

- Location takes advantage of street framework described in the Plan, but some displacement of proposed land uses will occur including the proposed University Laboratory School Site and two outdoor athletic fields.
- Approximately 15 acres of planned uses, within the community center, are needed for the new headquarters site.

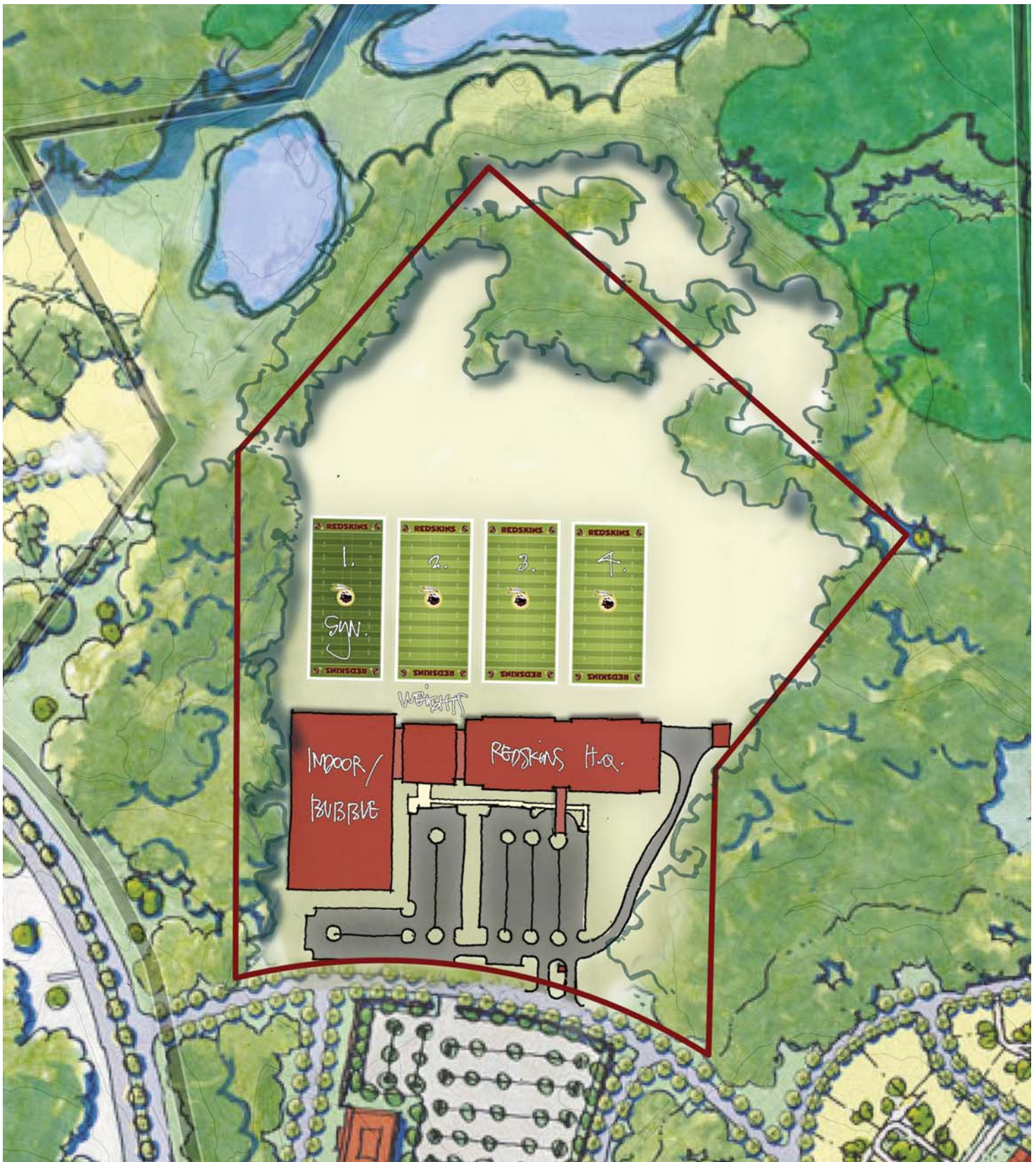




## Analysis

- Headquarters Building, discreet weight room, Indoor Practice Facility, Playing Fields in same orientation as FedEx Field.





## Analysis

- Headquarters Building, discreet weight room, Indoor Practice Facility, Playing Fields in north-south orientation, slightly more compact project footprint.





Summary

- The study area can accommodate a new Redskins headquarters and training facility in more than one configuration.

