

MARKET AND ECONOMIC ANALYSIS FOR A PROPOSED NEW SPORTS TOURISM FACILITY IN NORTHWEST BALTIMORE COUNTY, MARYLAND

PRESENTED TO: MARYLAND STADIUM AUTHORITY

FINAL REPORT – DECEMBER 2025



Report Letter

December 2025

Mr. Al Tyler, Vice President
Maryland Stadium Authority - Capital Projects Development Group
The Warehouse at Camden Yards - South Warehouse
351 West Camden Street - Suite 300
Baltimore, Maryland 21201

Dear Mr. Tyler:

Crossroads Consulting Services LLC is pleased to present the results of our feasibility study regarding the proposed new sports tourism facility in northwest Baltimore County, specifically at Reisterstown Regional Park. This report outlines our comprehensive research, analysis, and the key conclusions derived from this engagement.

In accordance with the terms of our engagement letter, the accompanying report is restricted to internal use by the Maryland Stadium Authority 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.

The findings contained in the report reflect analysis of information provided by primary and secondary sources that are assumed to be correct. 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. We have no obligation, unless subsequently engaged, to update our report or revise the information contained therein to reflect events and transactions occurring after the date of this report.

We have enjoyed serving you on this engagement and look forward to the opportunity to provide you with continued services.

Sincerely,

Crossroads Consulting Services LLC

Table of Contents

1.	INTRODUCTION	4
2.	MARKET ANALYSIS	9
3.	MARKET FINDINGS	56
4.	ECONOMIC IMPACT ANALYSIS	68
5.	LIMITING CONDITIONS & ASSUMPTIONS	82



Introduction



Introduction

Communities throughout the U.S. have recognized the economic and fiscal benefits associated with developing and operating various public assembly venues. In recent years, multiple indoor and outdoor sports complexes have been built throughout the country due, in part, to the ability of these facilities to drive economic activity at area businesses and increase tax revenues at both the local and state levels.

To maximize resources, communities are increasingly seeking opportunities that better respond to the anticipated long-term needs of their residents and generate overnight visitor demand. As such, some communities have chosen to pursue sports complexes to capitalize on existing assets and enhance market opportunities by targeting a diverse set of demand generators.

In 2019, Baltimore County (“County”) developed the Baltimore County Strategic Tourism Report, which prioritized the need for a sports tourism facility. Consistent with this strategic planning effort, the Maryland Stadium Authority (“MSA”) retained Crossroads Consulting Services LLC (“Crossroads” or “Crossroads Consulting”) to conduct an independent market and economic analysis assessing the overall viability of developing a new sports tourism facility in the County at Reisterstown Regional Park (also referred to as “Park” throughout this report). Reisterstown Regional Park is home to the Reisterstown Sportsplex (“Sportsplex”) and multiple outdoor fields. The development of a sports tourism facility could include enhancements to the existing indoor ice hockey rink, indoor soccer/lacrosse turf field, and outdoor playing fields and/or developing new facilities on the property.

The conclusions outlined in this study are only one factor that the County and MSA should consider in their strategic planning efforts. The research and analysis contained in this report are intended to allow the County and MSA to draw informed conclusions regarding the potential viability associated with future development of a proposed new sports tourism facility.



Introduction (cont'd)

The existing Reisterstown Regional Park offers three outdoor lighted rectangular fields and four lighted diamond fields with backstops, dugouts, and fences. Primary uses of the outdoor fields include soccer, baseball, softball, field hockey, flag football, lacrosse, and other programs hosted by organizations including, but not limited to, the Reisterstown Recreation Council, Hereford Zone Recreation Council, Towson Recreation Council, Baltimore Blast, Pikesville Recreation Council, and Lutherville-Timonium Recreation Council. In addition, the Park includes reservable picnic pavilions, a comfort station, and a storage building.

Located within the Park, the Sportsplex offers an NHL-sized ice rink for skating and hockey activities, and an artificial turf field for indoor soccer, lacrosse, and other activities. The Sportsplex is highly utilized and regularly hosts a variety of events, including hockey programs, Learn to Skate, public skating, etc. Contracted ice time is used by organizations such as Stevenson University, St. Timothy's School, Loyola University Maryland, and other local organizations. The facility also hosts community events like birthday parties and group gatherings. Given that the facility only has one ice sheet, it has not historically hosted a significant number of large-scale tournaments.

Reisterstown Regional Park is owned and operated by the County. While the County operates the outdoor fields, it leases operations and management of the Sportsplex to the Baltimore County Revenue Authority ("Revenue Authority") which includes full control of booking the indoor ice rink. Based on the existing agreement, the Revenue Authority must provide the indoor turf field surface to the County's Department of Recreation and Parks between 8:00 am and 10:00 pm daily, free of charge. The County's Department of Recreation and Parks cannot market to nor allow time to be reserved by groups or individuals that are not affiliated with a local recreation council.



Introduction (cont'd)

For informational purposes, the tables on this page provide a high-level summary of historical usage at the Sportsplex and outdoor fields based on available information provided by facility management. Crossroads did not independently verify or audit these figures; it was assumed that the data received is accurate and complete.

As shown, the ice rink is used for diverse community programming, and the outdoor and indoor fields are predominately used by local organizations.

Summary of Usage - Reisterstown Sportsplex Ice Sheet		
Program	2024	2025
Public Skating Usage - Admissions	2,210	2,210
Learn to Skate Usage - # of Skaters	785	977
Adult Hockey Usage - Games	535	535
Contract Ice Usage - Hours	1,600	1,600
Drop In Hockey Usage - Admissions	410	410
Party Room Usage - Rentals	77	12

Source: Facility management.



Reisterstown Regional Park - Outdoor and Indoor Fields - General Annual Usage				
Program	Start date	End date	Facility	Days/Hours
Winter				
Reisterstown Indoor soccer	December	March	Indoor Turf	Monday, Thursday, Friday, Saturday
Reisterstown Field Hockey	January	February	Indoor Turf	Wednesday Nights
Reisterstown Travel Soccer	December	March	Indoor Turf	Sundays
Reisterstown Adult Soccer	Year round		Indoor Turf	Sundays
Reisterstown Adult Soccer	Year round		Indoor Turf	Sundays
Owings Mills Softball	December	March	Indoor Turf	Tuesday nights
Turner Station Flag Football	December	March	Indoor Turf	Sundays
Reisterstown Baseball	January	March	Indoor Turf	Sundays
Reisterstown Travel soccer	December	March	Outside Turf	Tuesday & Thursdays
Reisterstown Lacrosse	December	February	Indoor Turf	Tuesday
Spring				
Reisterstown Lacrosse	March	May	Outside Turf	Tuesday, Wednesday, Thursday
Reisterstown Travel soccer	March	June	Outside Turf	Monday
Reisterstown Travel soccer	March	June	Outside Turf	Thursdays
Reisterstown Travel soccer	March	June	Outside Turf	Fridays
Reisterstown Travel soccer	March	June	Outside Turf	Saturdays
Reisterstown Soccer	March	June	Grass Field 2	Monday - Friday
Reisterstown Soccer	March	June	Grass Field 2	Saturdays
Reisterstown Soccer	March	June	Grass Field 3	Monday, Wednesday, Friday
Reisterstown Soccer	March	June	Grass Field 3	Saturday, Sunday
Reisterstown Baseball	April	June	Ball Diamonds	Wednesday Nights
Reisterstown Baseball	April	June	Ball Diamonds	Saturdays
Pikesville Adult Softball	May	July	Ball Diamonds	Sunday
Summer				
Reisterstown Travel soccer	June	June	Outside turf	Tuesday & Thursdays
Reisterstown Travel soccer	July	July	Outside Turf	Monday -Thursday
Reisterstown Field Hockey	June	June	Outside Turf	Mondays
Fall				
Hereford Football	August	November	Outside Turf	Tuesday, Wednesday, Thursday
Hereford Football	August	November	Outside Grass	Tuesday, Wednesday, Thursday
Reisterstown Travel Soccer & Reisterstown Youth Football	August	November	Outside Turf	Monday, Friday
LTRC Adult Softball	August	November	Ball Diamonds	Monday
Pikesville Adult Softball	August	September	Ball Diamonds	Sunday
Owings Mills Girls Softball	October	November	Indoor Turf	Thursdays

Source: Facility management.

Introduction (cont'd)

In 2025, MSA engaged Crossroads Consulting to conduct a market and economic analysis for a proposed new sports tourism facility at Reisterstown Regional Park in Baltimore County, Maryland. The primary purpose of this study is to assess the overall viability of enhancing the existing assets at Reisterstown Regional Park and/or developing new facilities on the property to generate sports tourism from a market and economic impact perspective.

Tasks completed as part of this study effort included, but were not limited to, the following:

- Conducted an on-site kickoff meeting with appropriate client representatives to develop an understanding of the study's background and key issues; confirmed scope and objectives; reviewed past Baltimore County tourism studies and existing data; and discussed potential facility program elements and project schedule.
- Reviewed past operations at Reisterstown Regional Park, including usage, rental rates, and financial performance.
- Analyzed local market conditions, including population trends, demographics, employment, transportation, hotels, amenities, and planned developments impacting demand for the enhanced and/or new sports tourism facilities.
- Profiled existing and planned sports facilities locally and regionally to identify potential supply gaps.
- Summarized regional and national sports participation trends.
- Profiled comparable sports tourism facilities.
- Obtained feedback from current and potential user groups related to the strengths, challenges and opportunities for enhanced/new facilities.
- Summarized market demand for sports tourism facilities at Reisterstown Regional Park.
- Estimated the economic impacts in terms of output, employment and labor income associated with potential improved and/or new sports tourism facilities based on the research and analysis described in the previous tasks.
- Estimated the tax revenues associated with the potential improvements and/or new sports tourism facilities to local and State governments.
- Summarized findings in a written report.

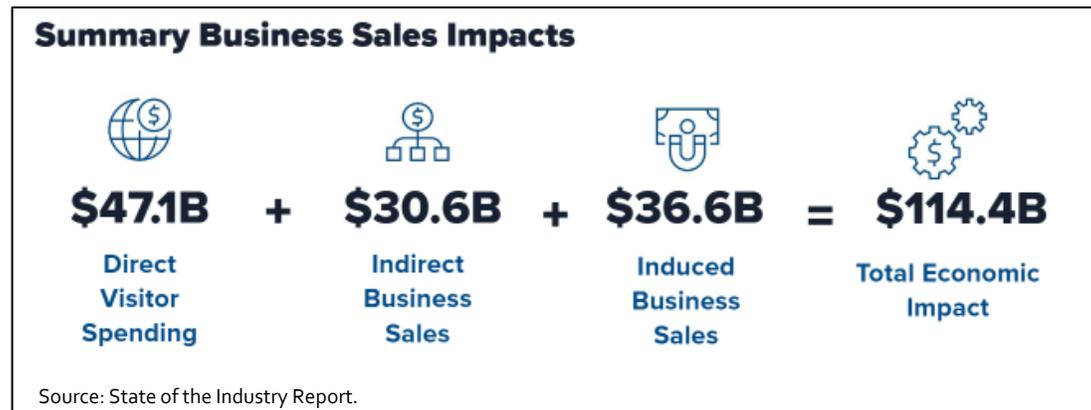
Market Analysis



Overview

Sports tourism is one of the fastest growing sectors in the tourism industry. As such, many sports tourism-focused facilities are being developed nationwide to attract visitors and related economic benefits.

The Sports Events and Tourism Association (“Sports ETA”) produces an annual State of the Industry Report, which tracks sports tourism spending patterns and reports survey-based insights from its destination members. According to the most recent report published in 2025, which reported on 2024, spectator sports tourism generated \$47.1 billion in direct spending, supporting a total economic impact of \$114.4 billion and 664,860 full-time and part-time jobs across the country. It also contributed \$8.5 billion in state and local tax revenues. The data shows that 109.7 million non-local attendees traveled 50 miles or more to attend sporting events in 2024, with 63.5 million staying overnight.



To assist in assessing the merits of developing a new sports tourism facility at Reisterstown Regional Park, this section includes analysis of the following:

- Demographic and socioeconomic data
- Tapestry segmentation
- Area employment
- Transportation access
- Hotel supply
- Area amenities
- Climate characteristics
- Supply of local and regional sports facilities
- Comparable facilities
- Sports participation trends
- Stakeholder and user group feedback

Demographic and Socioeconomic Data

Demographic and socioeconomic trends play a critical role in assessing the market potential for sports activity participants and event organizers. Potential new sports tourism facilities are expected to accommodate a diverse range of events, attracting both residents and visitors from broader regional and potentially national markets.

Sporting event organizers typically evaluate several key factors when selecting host locations, including accessibility, market demographics, and the quality of facility infrastructure. The presence of established youth and amateur sports organizations, commonly involved in tournaments, further enhances the appeal of a given location. In addition, variables such as population size, age distribution, and household income levels are often considered when evaluating host market viability.

Recreational leagues and general sports programming tend to draw participants from within the immediate area, while elite teams are typically willing to travel up to an hour for practices and competitions. Industry data suggests that large-scale tournaments can attract attendees from broader geographies, with many drive-in visitors originating from within a five-hour drive-time radius.

Accordingly, this section presents demographic and socioeconomic profiles for Reisterstown and Baltimore County, as well as 60-, 180- and 300-minute drive times from Reisterstown Regional Park. Comparative data for the State of Maryland and the United States is also provided.

The ensuing analysis offers insight into the demographic and economic characteristics of these defined geographic areas. While these profiles are not direct predictors of demand, they provide valuable context regarding the environment in which the potential enhanced and/or new sports tourism facilities would operate.

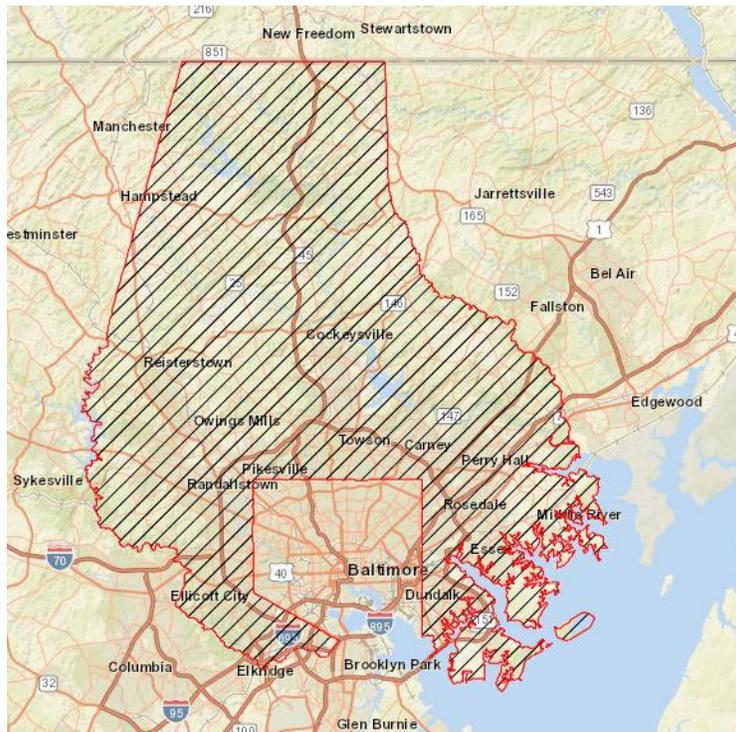


Demographic and Socioeconomic Data (cont'd)

The maps below illustrate the geographic footprint of the County as well as 60-, 180- and 300-minute drive times.

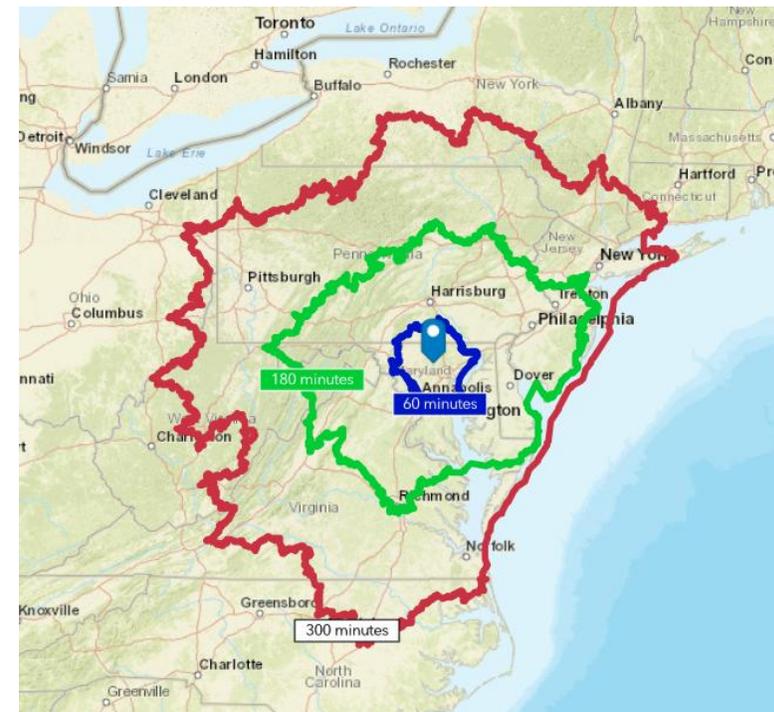
Baltimore County generally surrounds the City of Baltimore and extends north to the Pennsylvania border. Geographically, the County lies north of the Chesapeake Bay. The 60-minute drive time reaches into Washington, D.C. and north to southern portions of Pennsylvania. The 180-minute drive expands further into Virginia, New Jersey, Delaware, and Pennsylvania. The 300-minute drive captures a broad area including, but not limited to, portions of New York, North Carolina and West Virginia.

Map of the County



Source: Esri

60, 180, 300-minute Map



Source: Esri.

Demographic and Socioeconomic Data (cont'd)

Population

Population serves as the foundation from which the proposed new sports tourism facility could draw participation, attendance, and other forms of support.

As shown in the table below, the population within the County in 2025 is 854,750. The population within a 60-minute drive time is approximately five times greater, at 4.2 million, while the 180-minute and 300-minute drive times are significantly larger at 23.8 million and 55.4 million, respectively. Although a modest population increase is projected between 2025 and 2030 within the 60-, 180-, and 300-minute drive times, this growth is expected to occur at a slightly slower rate than that of the U.S.

Population Summary							
Population Summary	Reisterstown	Baltimore County	60-Min Drive Time	180-Min Drive Time	300-Min Drive Time	State of Maryland	U.S.
2010 Total Population	25,968	805,029	3,898,737	21,762,800	51,983,203	5,773,552	308,745,538
2020 Total Population	26,822	854,535	4,169,710	23,321,142	54,846,794	6,177,224	331,449,281
2025 Total Population	26,510	854,750	4,216,511	23,808,870	55,369,637	6,270,068	339,887,819
2030 Total Population	26,460	857,977	4,271,660	24,225,580	55,874,673	6,367,035	347,149,422
2010-2020 Annual Rate	0.33%	0.61%	0.70%	0.72%	0.55%	0.70%	0.74%
2020-2025 Annual Rate	-0.23%	0.01%	0.22%	0.42%	0.19%	0.30%	0.51%
2025-2030 Annual Growth Rate (Projected)	-0.04%	0.08%	0.26%	0.35%	0.18%	0.31%	0.42%

Source: Esri.

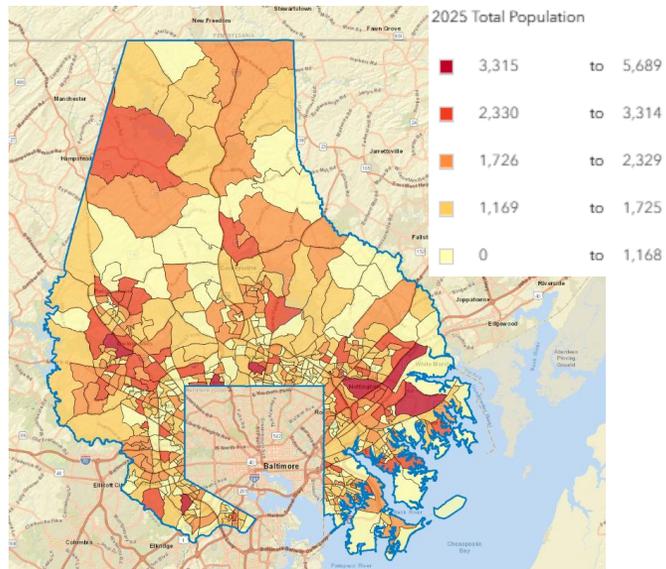


Demographic and Socioeconomic Data (cont'd)

Population (cont'd)

To provide more detailed insights of the population in the profiled markets, the following maps illustrate the population density within the County as well as the 60- and 300-minute drive times.

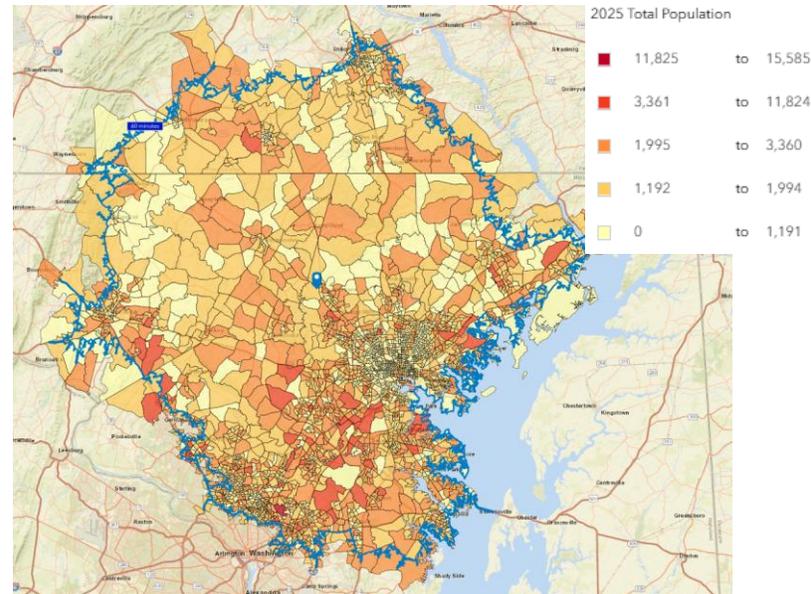
Baltimore County Population Density



Source: Esri.

The County's highest population density is located near the City of Baltimore, with less populated areas to the north.

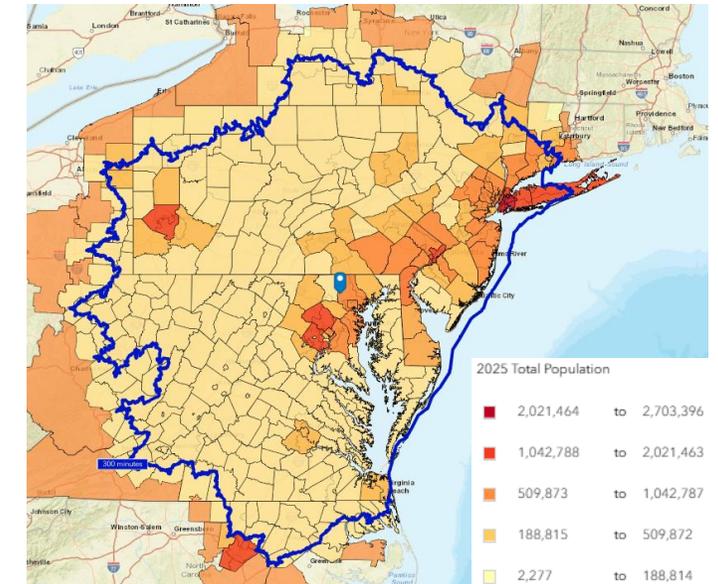
60-Minute Drive Time Population Density



Source: Esri.

The highest concentration of population within the 60-minute drive time is primarily located to the south in the City of Baltimore and in and around Washington, D.C.

300-Minute Drive Time Population Density



Source: Esri.

As mentioned previously, the 300-minute drive time encompasses several large markets in Virginia, New Jersey, Pennsylvania and New York.

Demographic and Socioeconomic Data (cont'd)

Age Distribution

The distribution of the population by age is important to understand as different events are often targeted to participants within specific age groups. Individuals under 18 years of age are a key target market for participants in sports tournaments/competitions that generate sports tourism. As shown below, the population under the age of 18 ranges from approximately 20% to 22% within the profiled areas, which is consistent with that of the U.S.

Age Distribution							
2025 Population by Age	Reisterstown	Baltimore County	60-Min Drive Time	180-Min Drive Time	300-Min Drive Time	State of Maryland	U.S.
Age 14 and Under	18.1%	16.9%	17.6%	16.9%	16.6%	17.4%	17.2%
Age 15 - 24	13.0%	13.2%	12.9%	12.9%	12.7%	12.6%	13.2%
Age 25 - 34	13.8%	12.7%	13.7%	13.7%	13.9%	13.5%	13.6%
Age 35 - 44	14.3%	13.4%	14.0%	13.4%	13.4%	13.7%	13.2%
Age 45 - 54	12.2%	11.6%	11.9%	12.0%	12.0%	12.1%	12.0%
Age 55 - 64	12.1%	12.1%	12.2%	12.4%	12.6%	12.6%	12.1%
Age 65 - 74	9.8%	11.1%	10.2%	10.5%	10.7%	10.4%	10.7%
Age 75 - 84	5.2%	6.4%	5.7%	6.0%	6.1%	5.8%	6.1%
Age 85+	1.5%	2.5%	1.9%	2.1%	2.2%	1.9%	2.0%
Age 18+	77.6%	79.4%	78.8%	79.4%	80.0%	78.9%	79.2%
Age < 18	22.4%	20.6%	21.2%	20.6%	20.0%	21.1%	20.8%
2025 Median Age	38.5	40.3	39.1	39.7	40.1	39.8	39.6

Source: Esri.

Income Distribution

Household income levels are an indicator of spending potential and the ability for households to purchase goods and services including sporting event participation or attendance. Median and average household income levels for the County and the profiled drive time areas are above that for the U.S. The projected growth rate for Reisterstown slightly exceeds the national average, while income levels in the other profiled areas are generally in line with the U.S.

ESRI's Spending Potential Index ("SPI") represents the amount spent in an area relative to a national average of 100. All profiled areas outside of Reisterstown have a higher Entertainment/Recreation SPI than the U.S.

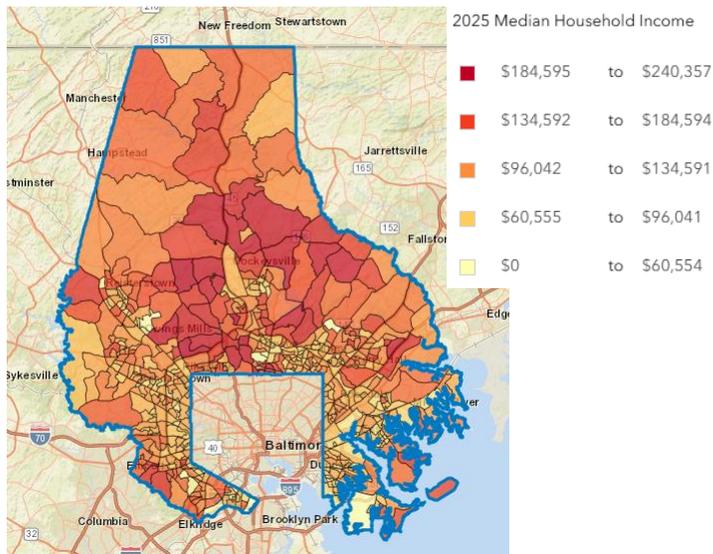
Household Income Distribution							
2025 Household Income Distribution	Reisterstown	Baltimore County	60-Min Drive Time	180-Min Drive Time	300-Min Drive Time	State of Maryland	U.S.
Less than \$15,000	8.6%	7.3%	7.5%	7.3%	8.3%	7.4%	8.3%
\$15,000 to \$24,999	5.5%	4.2%	3.9%	4.6%	5.4%	3.8%	5.9%
\$25,000 to \$34,999	5.9%	5.4%	4.7%	5.1%	5.5%	4.5%	6.3%
\$35,000 to \$49,999	9.9%	8.5%	7.8%	8.1%	8.6%	7.4%	9.8%
\$50,000 to \$74,999	15.6%	16.0%	13.8%	14.0%	13.9%	13.4%	15.6%
\$75,000 to \$99,999	10.5%	12.0%	11.6%	12.0%	11.7%	11.7%	12.5%
\$100,000 to \$149,999	18.7%	20.3%	19.0%	18.3%	17.4%	19.1%	17.8%
\$150,000 to \$199,999	11.2%	10.4%	11.9%	11.6%	10.7%	12.1%	9.8%
\$200,000+	14.1%	15.8%	19.8%	19.1%	18.6%	20.7%	14.0%
2025 Median Household Income	\$84,231	\$91,466	\$101,239	\$97,221	\$91,499	\$103,503	\$81,624
2030 Median Household Income	\$100,103	\$102,785	\$112,013	\$108,418	\$103,345	\$114,930	\$92,476
2025-2030 Annual Growth Rate (Projected)	3.8%	2.5%	2.1%	2.3%	2.6%	2.2%	2.7%
2025 Average Household Income	\$109,056	\$121,669	\$133,033	\$133,659	\$132,425	\$137,511	\$116,179
2030 Average Household Income	\$122,139	\$134,369	\$146,512	\$146,602	\$145,418	\$151,003	\$128,612
2025-2030 Annual Growth Rate (Projected)	2.4%	2.1%	2.0%	1.9%	2.0%	2.0%	2.1%
2025 Entertainment/Recreation SPI	93	104	113	115	113	117	100

Demographic and Socioeconomic Data (cont'd)

Income Distribution (cont'd)

For informational purposes, the following maps illustrate the median household income within the County as well as the 60- and 300-minute drive times.

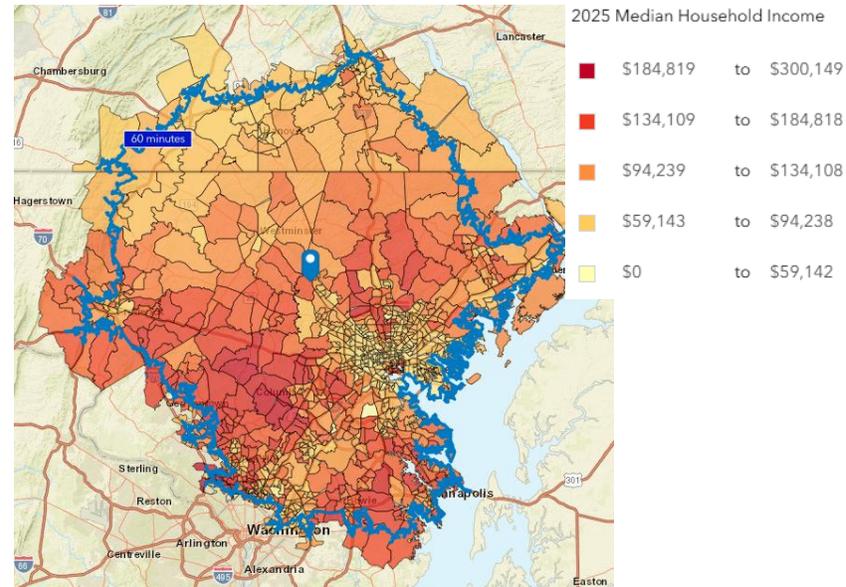
**2025 Median Household Income
Baltimore County**



Source: Esri.

The median household income in the County is highest in the central area.

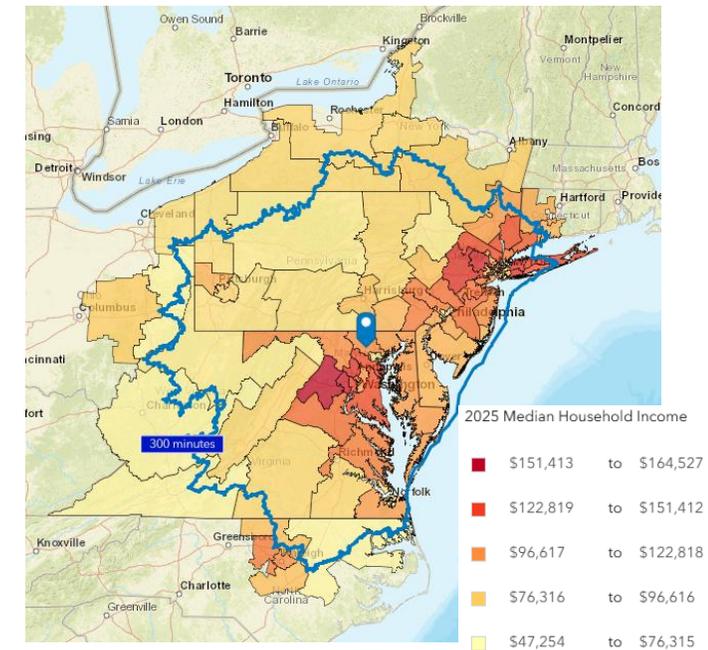
**2025 Median Household Income
60-Minute Drive Time**



Source: Esri.

Within the 60-minute drive time the highest median household incomes are in the southwestern portions of the region.

**2025 Median Household Income
300-Minute Drive Time**



Source: Esri.

There are multiple locations with high median household income within the 300-minute drive time, mostly along the East Coast.

Tapestry Segmentation

According to Esri, tapestry segmentation classifies neighborhoods into 67 segments on both demographics and socioeconomic attributes. They summarize lifestyle choices as well as what people buy and how people spend free time. The top tapestry segments for the County include Dreambelt, Savvy Suburbanites, and Kids and Kin. The following provides a brief description of each of these three tapestry segments as defined by Esri.

Dreambelt (11.5% of 2025 Households): These suburban neighborhoods are predominantly located in the West, often outside the principal cities of major metropolitan areas. About half of the population is between 35 and 74, and most households consist of married or cohabiting couples. Most households earn middle-tier incomes, and labor force participation is high. This segment has a high concentration of employment in public administration, construction, health care, and retail trade sectors. Neighborhoods consist mainly of single-family homes built between 1950 and 1990, offering ample parking space, often for three or more vehicles. A significant portion of the population commutes alone by car. Rental rates and home prices are substantial, with more than half of the properties for purchase valued between \$300,000 and \$500,000.

Savvy Suburbanites (10% of 2025 Households): These neighborhoods tend to be concentrated in New England and the Mid-Atlantic. Some couples have children who have grown up and left the house, and around a quarter still have kids at home. Residents work in professional fields such as management and finance. The combined wages of both spouses position these families solidly in the middle to upper income tiers. Investments, retirement income, and valuable properties also contribute to the high net worth of households commonly found in these neighborhoods. Residents in this segment gravitate toward suburban communities, which include both newly developed and well-established areas, within major metropolitan areas. Nearly all homes are single-family and owner-occupied, with very few rental properties available, and most homes were built between 1970 and 2000.

Kids and Kin (6.5% of 2025 Households): Neighborhoods in this segment are largely found in and around metropolitan areas with populations exceeding half a million. Householders are generally under the age of 54 and may have adult children living with parents at home. The majority of the population aged 25 and above have a high school diploma, an associate degree, or some college education. Jobs are often in the health care, retail, food, manufacturing, and transportation sectors; there is a high level of female labor force participation. Residents live in older homes, usually as renters, with a notable presence of town homes and smaller low-rise rental buildings. On average, homes are modestly priced and affordable for most households. Suburban residents rely on vehicles to get to work, while those in and near cities use public transportation.



Employment Base

The composition of an area’s employment by industry can be a factor in attracting certain events and/or seeking advertising and sponsorship opportunities at the potential enhanced and/or new sports tourism facilities. A balanced distribution of the workforce is advantageous, as it prevents overreliance on any single industry segment. Additionally, a diverse local economy is better insulated from economic downturns.

In 2025, there are approximately 453,400 total jobs in the County, dominated by the Services industry, followed by Retail Trade and Public Administration. The Services industry is generally well-equipped to accommodate both residents and visitors.

Baltimore County 2025 Employed Population 16+ by Industry		
Industry	Total Jobs	% of Total
Services	243,904	53.8%
Retail Trade	43,975	9.7%
Public Administration	38,988	8.6%
Finance/Insurance/Real Estate	33,548	7.4%
Transportation/Utilities	26,295	5.8%
Construction	25,841	5.7%
Manufacturing	24,481	5.4%
Wholesale Trade	7,707	1.7%
Information	7,254	1.6%
Agriculture/Mining	1,360	0.3%
Total	453,354	100%

Note: Sorted in descending order by total number of jobs.

Source: Esri.

The table below summarizes the top 15 employers in the County in 2024, the most recent data available at the time of this report. As shown, Baltimore County Public Schools and the Social Security Administration/CMS are the largest employers with 15,778 and 11,879 employees, respectively.

Baltimore County - 2024 Top 15 Employers	
Employer	Employees
Baltimore County Public Schools	15,778
Social Security Administration/CMS	11,879
Amazon	9,000
Baltimore County Government	7,580
University System of Maryland	5,698
Medstar Franklin Square Hospital	4,747
Center for Medicare & Medicaid Services	4,282
Greater Baltimore Medical Center	3,289
BD Life Science, Diagnostic Systems	2,950
Community College of Baltimore County	2,444
University of Maryland St. Josephs Medical Center	2,366
Sheppard Pratt Health System	2,250
T. Rowe Price Associates, Inc	2,183
McCormick & Company, Inc	2,093
Centric Business Systems, Inc	1,964
Total	78,503

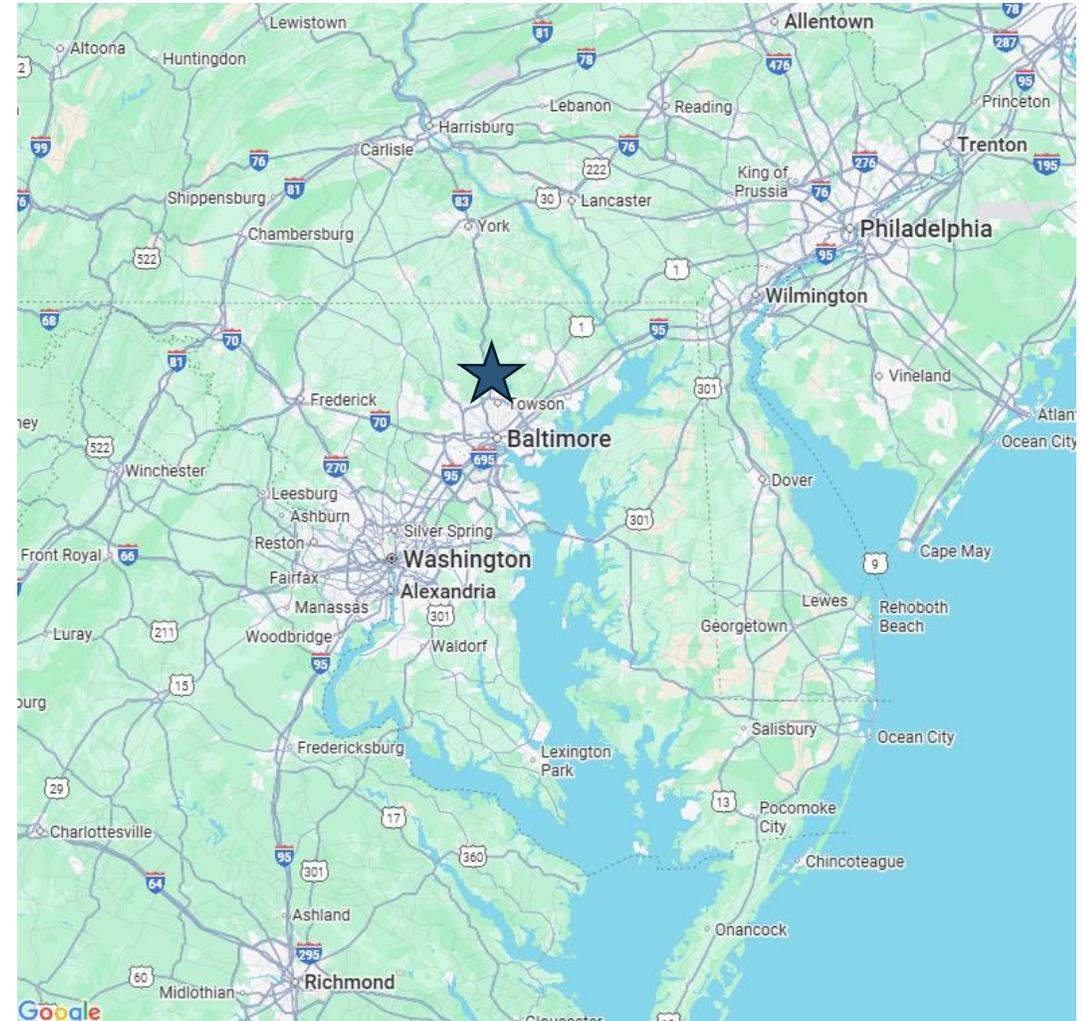
Source: Baltimore County Department of Economic Development.

Transportation Access

The ease of access to a venue for attendees is a consideration that event planners and organizers take into account when selecting a destination to host their events. In addition, the location and accessibility of a facility, relative to the population base, can impact its marketability for events.

Reisterstown Regional Park is well positioned to serve visitors traveling from across Maryland and neighboring states. It sits just east of Interstate 795, which connects directly to the Baltimore Beltway (I-695) and provides access to the broader interstate network, including I-95, I-70, and I-83. These major corridors link the region to Pennsylvania, Delaware, Washington, D.C., Northern Virginia, and West Virginia, making the Park accessible for non-local tournament participants and spectators. Locally, Maryland Route 140 serves as the primary access corridor; however, reaching the Park via Mitchell Drive can be challenging for westbound traffic, as vehicles must turn across oncoming traffic. This may create congestion during peak periods.

Proximate and convenient air access can be important in serving the needs of sporting event organizers and participants, particularly for national events. Baltimore County is serviced by several airports. The closest major airports, Baltimore/Washington International Thurgood Marshall (BWI) and Ronald Reagan Washington National Airport (DCA), are 25 and 57 miles from Reisterstown, respectively. In 2024, BWI recorded 13,221,461 enplanements and DCA recorded 12,750,892 enplanements. The Federal Aviation Administration (FAA) defines enplanements as domestic, territorial, and international passengers who boarded an aircraft on scheduled and nonscheduled air service.



Note: Location of Reisterstown Regional Park is indicated with a star.
Source: Google maps.

Hotel Supply

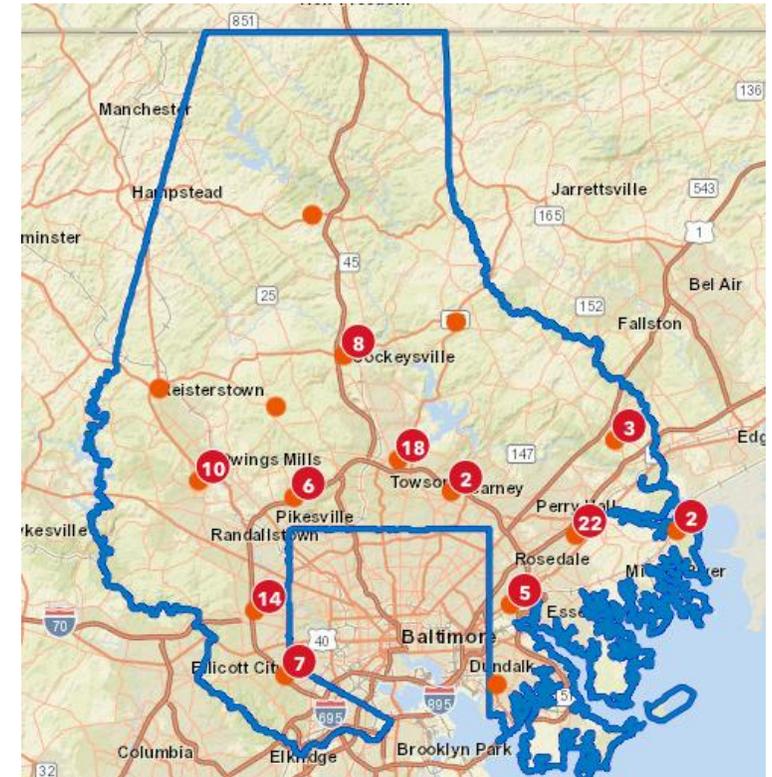
Lodging, both in terms of supply and range of offerings, as well as proximity to a sport complex, can play an important role in attracting sporting events that draw overnight attendees. Research indicates that participants and spectators tend to travel farther and stay longer when suitable accommodations are readily available. The table below profiles the supply of hotel rooms in the County. The inventory presented reflects available data; in the absence of a single comprehensive registry, it should be viewed as illustrative rather than exhaustive, intended to convey the breadth of lodging options within the County.

According to multiple industry sources including Smith Travel Research, there are over 5,700 rooms in the County. These hotels are primarily concentrated around the Owings Mills, Hunt Valley, and White Marsh communities. For informational purposes, Smith Travel Research reports the average daily rate (“ADR”) in the County was \$102.91 in 2023 and \$101.34 in 2024.

Hotel Supply in Baltimore County, MD			
Property	# of Rooms	Property	# of Rooms
Sheraton Baltimore North	283	Fairfield Inn and Suites White Marsh	116
Marriott Owings Mills Metro Centre	229	Homestyle Inn Catonsville	115
Embassy Suites Baltimore/Hunt Valley	223	Hampton Inn Suites Baltimore North/Timonium	114
Comfort Inn Towson	185	Home2 Suites by Hilton Baltimore/White Marsh	108
Doubletree by Hilton Baltimore North/Pikesville	170	Hampton Inn Baltimore/Owings Mills	105
Hilton Garden Inn Owings Mills	159	Ramada Limited Cockeysville	104
Hilton Garden Inn Baltimore/White Marsh	155	Extended Stay America Baltimore/Timonium	104
Courtyard Baltimore Hunt Valley	146	Holiday Inn Express Baltimore/White Marsh	102
Holiday Inn Timonium	146	Home2 Suites by Hilton Owings Mills	101
Hampton by Hilton Towson	143	Residence Inn by Marriott Owings Mills	100
Residence Inn Baltimore Hunt Valley	141	Hampton Inn & Suites Baltimore/Woodlawn	92
Holiday Inn Express Towson/Baltimore North	139	Motel 6 Catonsville MD/Baltimore West	92
Red Roof Inn Baltimore North/Timonium	137	Red Roof Inn Baltimore	92
Holiday Inn Express & Suites Baltimore West	133	Holiday Inn Express & Suites Owning Mills	86
Residence Inn Baltimore/White Marsh	131	Country Inn & Suites By Radisson, Baltimore	81
Rodeway Inn Baltimore West	131	Super 8 Baltimore Northwest	76
Ramada Baltimore West	129	Howard Johnson Pikesville	74
La Quinta Inn & Suites N Baltimore White Marsh	128	Studio 6 Suites Catonsville/Baltimore West	73
Hampton Inn Baltimore/White Marsh	127	Regal Inn & Suites	62
Best Western Plus Towson	127	Towson East Motel	62
Holiday Inn Express Hunt Valley	125	Super 8 Baltimore/Essex Area	49
Hyatt Place Baltimore/Owings Mills	123	Express Inn Towson	16
WoodSpring Suites Baltimore/White Marsh	122	Gramercy Mansion B&B	11
Springhill Suites Marriot Baltimore/White Marsh	120		
Quality Inn Windsor Mill	119		
Total			5,706
Average			119

Source: Various hotel sources.

Map of Hotel Properties in Baltimore County



Note: The number in the circles reflects the number of hotels in that area.

Source: Esri.

Area Amenities

The supply of retail outlets, dining options and entertainment/attractions are often important factors that event organizers consider when choosing where to host an event, as attendees typically desire a location that provides for leisure beyond the event itself. Many attendees seek nearby attractions during breaks from event-related activities, and the nature and scope of such attractions are often a deciding factor on who chooses to travel and length of stay.

Reisterstown offers a mix of suburban convenience and small-town charm, with access to local parks, shops, and restaurants along Main Street. The community also benefits from a proximate location to Owings Mills and Baltimore for additional amenities.

The broader County area has many historical, cultural and entertainment-based attractions appealing to visitors. There is a wide variety of indoor & outdoor recreational options, including walking trails, cycling, golf, dining, shopping, live music, fishing, kayaking and other water activities.

Amenities and attractions in the County include, but not are not limited to:

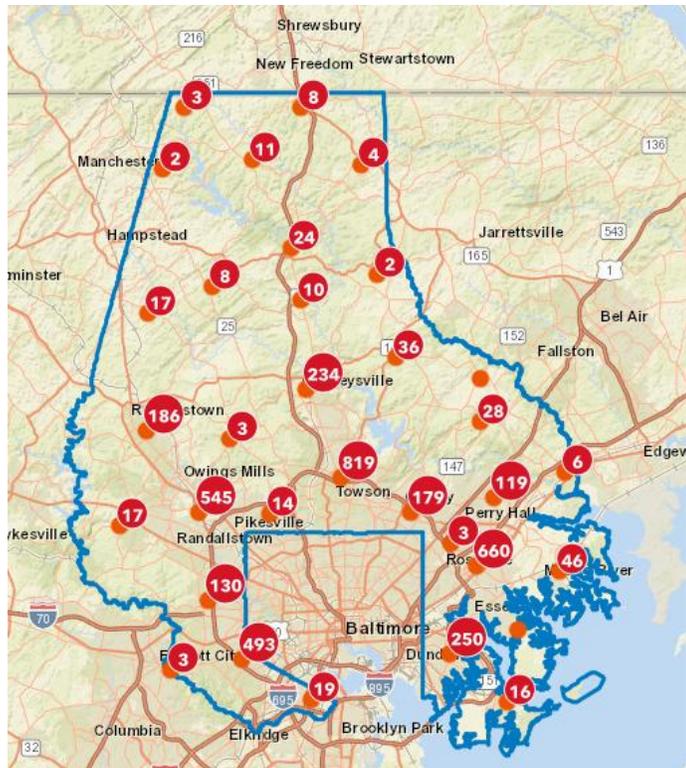
- Oregon Ridge Park & Nature Center (Cockeysville)
- Gunpowder Falls State Park
- Patapsco Valley State Park
- Loch Raven Reservoir
- Hampton National Historic Site
- Benjamin Banneker Historical Park & Museum
- Perry Hall Mansion
- Maryland State Fairgrounds
- Weber's Cider Mill Farm
- Boordy Vineyards
- Greenspring Valley and horse country
- Guinness Open Gate Brewery & Barrel House



Area Amenities (cont'd)

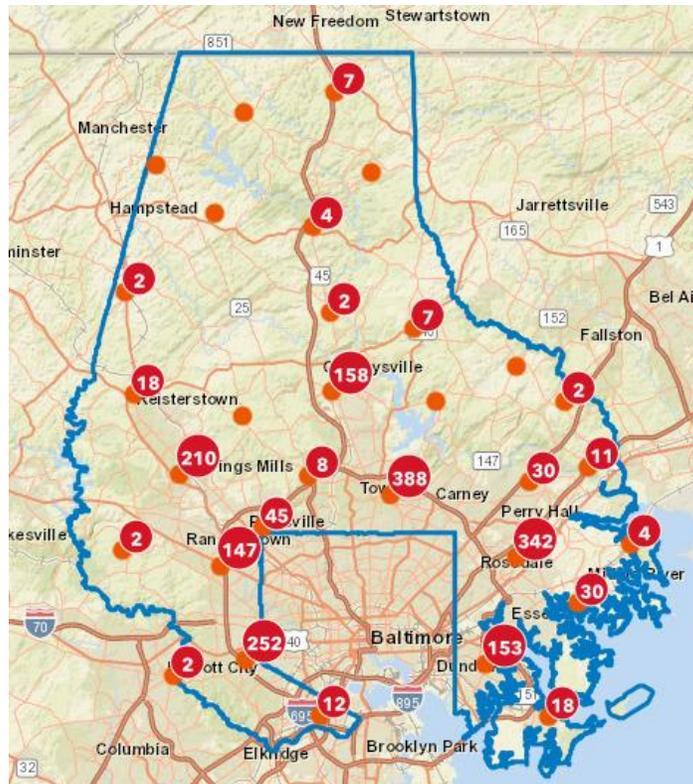
The maps below depict the concentration of retail, dining and entertainment establishments within the County. The presence of each category is predominantly located in the southern half of the County. The Baltimore County Master Plan 2030 places an emphasis on transforming underutilized commercial properties into vibrant, mixed-used “nodes” where retail, dining and entertainment; housing; and hospitality can co-locate. This approach aims to create walkable, amenity-rich destinations that enhance community vitality and economic growth.

Baltimore County Retail Establishments



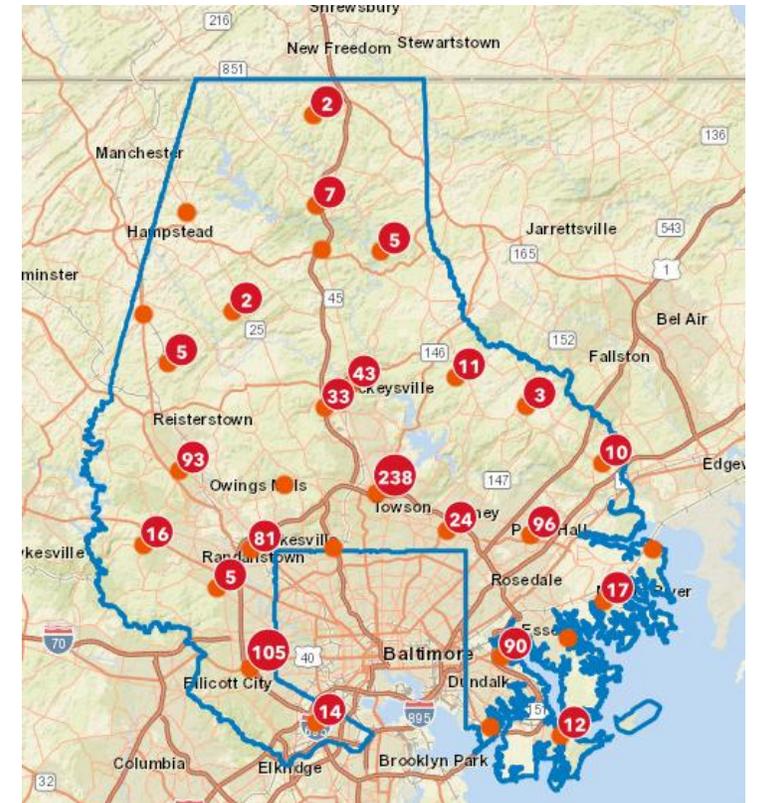
Note: Number in circles indicates the number of establishments in that area.
Source: Esri.

Baltimore County Dining Establishments



Note: Number in circles indicates the number of establishments in that area.
Source: Esri.

Baltimore County Recreation & Entertainment Establishments

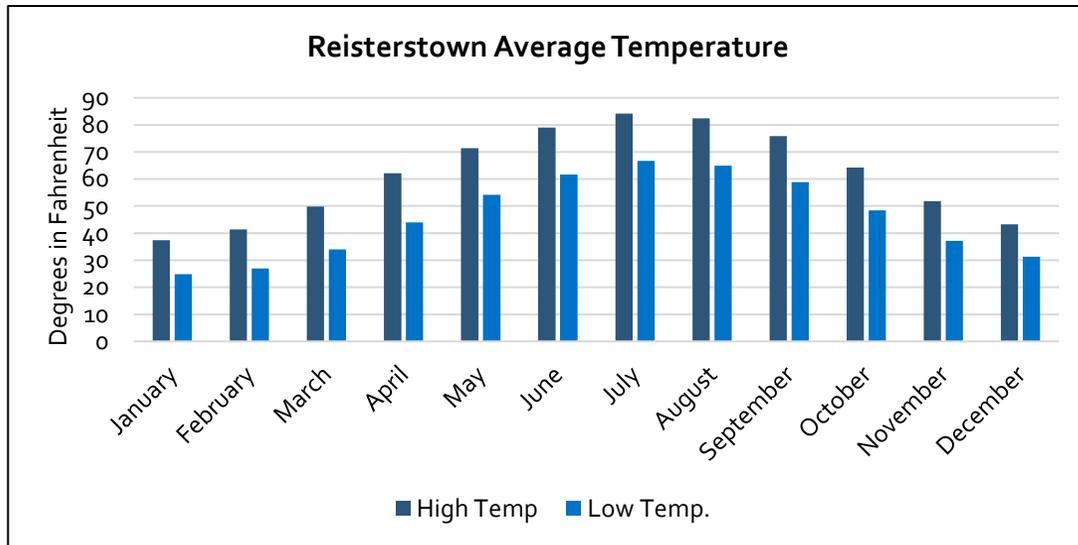


Note: Number in circles indicates the number of establishments in that area.
Source: Esri.

Climate Characteristics

Sports event organizers, particularly those involved with outdoor activities, consider an area's climate when selecting event locations and venues, as it can impact playing surface, as well as overall comfortability.

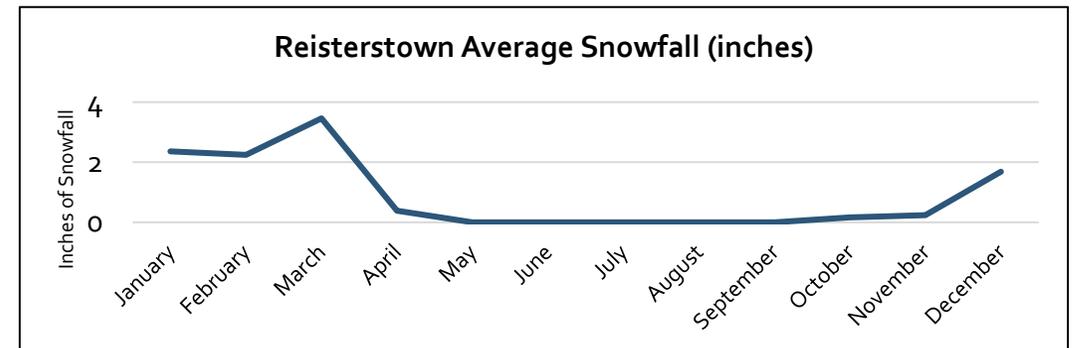
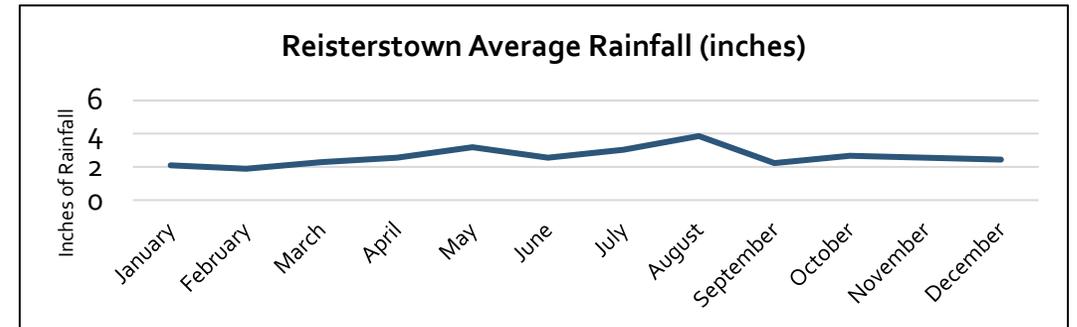
The chart below illustrates the average high and low temperature by month for Reisterstown. The average high temperature exceeds 60 degrees for more than half the year. As expected, temperatures are lowest from November through March.



Source: Weather Atlas.

Months with high precipitation could negatively impact outdoor sporting events, particularly on natural grass fields, which are more susceptible to weather conditions than turf fields.

On average, rainfall in Reisterstown ranges from approximately 2 to 4 inches per month, with the highest rainfall occurring in the spring and summer months. Snowfall is heaviest from December through March, averaging approximately 2 to 3.5 inches.



Source: Weather Atlas.

Supply of Local Facilities

The extent that existing sports facilities meet the needs of target markets is important to consider when assessing demand for a new sports tourism facility. Facility size, program elements, configuration, quality/condition, age, market focus and date availability are factors that impact how competitive facilities may be to the proposed new sports tourism facility. While this section provides an overview of select local and regional sports facilities, it is not meant to be an all-inclusive inventory of facilities.

Local Sports Facilities

The adjacent table summarizes the supply of indoor and outdoor sports facilities in the County. As shown, most facilities have a limited number of fields or courts, which limits their ability to host large sports-tourism events without the use of other sites. Larger local sports facilities are associated with Towson University or University of Maryland Baltimore County (“UMBC”). These facilities prioritize internal collegiate athletic needs rather than sports tourism. Genesee Valley Outdoor Learning Center has nine rectangular fields, which are primarily for community needs but do host tournament activities.

Outside of the Sportsplex, there was one ice rink in the County at Patterson Park; however, it has been announced that the rink is closing following the 2025-26 season.

In addition to the profiled facilities, there are several small-scale sports facilities in the County associated with schools that host recreational activities and some tournament activity.

Baltimore County - Attributes of Local Indoor and Outdoor Sports Facilities		
Facility	Location	Type
CAA Youth Sports - Soccer Fields	Catonsville	3 Outdoor Rectangular Fields
Goals Baltimore	Catonsville	2 Indoor Turf Fields, 1 Indoor Court
Genessee Valley Outdoor Learning Center	Parkton	7 Regulation Rectangular Fields, 2 Youth
Sparrows Point Park & Rec Center	Edgemere	1 Outdoor Rectangular Turf Field, 2 Indoor Courts
Alumni Field - UMBC	Catonsville	1 Outdoor Diamond
Retriever Activities Center Arena - UMBC	Catonsville	1/10 Mile Indoor Track, 3 Indoor Courts
Retriever Soccer Park - UMBC	Catonsville	1 Outdoor Rectangular Field
Retriever Practice Fields - UMBC	Catonsville	3 Outdoor Rectangular Fields
Softball Stadium - UMBC	Catonsville	1 Outdoor Diamond
Retriever Tennis Complex - UMBC	Catonsville	8 Outdoor Tennis Courts
UMBC Stadium	Catonsville	1 Outdoor Rectangular Field
Mustang Stadium - Stevenson University	Owings Mills	1 Outdoor Rectangular Field
SECU Arena - Towson University	Towson	1 Indoor Court
Johnny Unitas Stadium - Towson University	Towson	1 Outdoor Rectangular Field
Tiger Soccer Complex - Towson University	Towson	3 Outdoor Rectangular Fields
Tiger Softball Complex - Towson University	Towson	1 Outdoor Diamond
John B. Schuerholz Park - Towson University	Towson	2 Outdoor Diamond
Burdick Turf Fields - Towson University	Towson	7 Outdoor Rectangular Fields
Southeast Regional Recreation Center	Dundalk	1 Indoor Athletic Field, 1 Indoor Court
Chesterwood Park	Dundalk	1 Outdoor Rectangular Field

Sources: Baltimore County; Maryland Sports, Facility websites.

Supply of Regional Outdoor Facilities

Regional Outdoor Sports Facilities

This adjacent table profiles select existing outdoor sports facilities in the region which is defined as a five-hour drive time from Reisterstown Sportsplex. For purposes of this analysis, only sports tourism facilities with a minimum of six (6) tournament-quality fields were profiled as this is generally considered the minimum number of fields to host significant sports-tourism events. This list is not meant to be an all-inclusive inventory of facilities, rather to illustrate the breadth of facilities in the region.

Many of these facilities are in Maryland and Virginia and could potentially compete with the proposed new sports tourism facility for outdoor tournaments/competitions.

Profiled outdoor sports facilities feature a mix of diamond and rectangular fields. Several facilities such as Warhill Sports Complex, Cedar Lane Regional Park, Baron Cameron Park, Princess Anne Athletic Complex, McReynolds Athletic Complex, and Randalls Island Park offer both rectangular and diamond fields. In terms of total fields, there are 23 facilities with 10 or more. There are 28 that offer rectangular fields and 11 that offer diamond fields. When excluding Randalls Island Park, which has a significantly higher number of fields than the others profiled, the average number of total fields, rectangular fields and diamond fields is 13, 12, and 6, respectively.

Attributes of Select Regional Outdoor Sports Complexes									
Facility	Location	Operator	Miles From Site	Diamonds		Rectangular		Total	Stadium Seating
				Total Fields	Lighted	Total Fields	Lighted		
Carsins Run	Aberdeen, MD	Private	8			12		12	n/a
The Harford Polo Grounds	Jarrettsville, MD	Private	25			11		11	n/a
Bob Lucido Fields at Covenant Park	Ellicott, MD	Private	25			9	9	9	n/a
Coppermine CopperPlex	Edgewood, MD	Private	40			8	8	8	n/a
Cedar Lane Regional Park	Bel Air, MD	Private	45	1		13		14	900
The Ripken Experience	Aberdeen, MD	Private	45	9	2			9	6,300
Liberty Sports Park	Upper Marlboro, MD	Non-Profit	48			10	10	10	n/a
Maryland SoccerPlex	Boysds, MD	Non-Profit	50			24	6	24	3,200
Calvert Regional Park	North East, MD	Public	65			11		11	n/a
Classics Soccer Park	Manheim, PA	Private	70			10		10	n/a
Baron Cameron Park	Reston, VA	Public	70	1	1	9		10	n/a
Legacy Park	Ruther Glen, VA	Public	70	8	8			8	n/a
Kirkwood Soccer Complex	New Castle, DE	Private	85			14		14	n/a
United Sports	Downingtown, PA	Private	90			11	4	11	1,200
Embrey Mill Park	Stafford, VA	Public	105			11	11	11	n/a
Sandhill Fields	Georgetown, DE	Non-Profit	120			8		8	n/a
DE Turf Sports Complex	Frederica, DE	Non-Profit	120			12	5	12	700
Philip A. Bolen Memorial Park	Fredericksburg, VA	Non-Profit	130			17	17	17	n/a
Henry S. Parker Athletic Complex	Salisbury, MD	Public	130	8	6			8	n/a
Princess Anne Athletic Complex	Virginia Beach, VA	Private	135	8	8	8	4	16	n/a
Salisbury University	Salisbury, MD	Private	135	2	2	6		8	n/a
Tuckahoe Turf Farm	Hammonton, NJ	Public	140			14		14	n/a
Mercer County Park	West Windsor Township, NJ	Public	155	10		17		27	n/a
Striker Park	Glen Allen, VA	Private	170			11	2	11	n/a
West Creek Complex	Richmond, VA	Private	170			10		10	n/a
River City Sportsplex	Midlothian, VA	Public	180			16	16	16	n/a
Warhill Sports Complex	Williamsburg, VA	Public	205	8	4	14	6	22	3,000
McReynolds Athletic Complex	Yorktown, VA	Public	210	7	7	6	6	13	n/a
Randalls Island Park	New York, NY	Non-Profit	220	42	4	30	4	72	n/a
Hampton Roads Soccer Complex	Virginia Beach, VA	Non-Profit	260			26	8	26	260
Publix Virginia Soccer Training Center	Virginia Beach, VA	Public	260			8	2	8	n/a
Average			116	9	5	13	7	15	2,223

Notes: Sorted by distance.
n/a denotes data not available.
Highlighted facilities are located in Maryland.

Sources: Maryland Sports; MAASA; Individual Facilities; Secondary Research.

Supply of Regional Indoor Facilities

Regional Indoor Sports Facilities

This section profiles existing indoor sports facilities in the region with courts, ice sheets and/or turf fields that may present competition for the proposed sports tourism facility for tournaments/competitions and other sports-related activities. For purposes of this analysis, only facilities with a minimum of four (4) courts, two (2) ice sheets or two (2) indoor turf fields were profiled as this is generally considered the minimum requirement for sports-tourism activities. As such, certain facilities in the State and region are not profiled including Capital Clubhouse, Hagerstown Ice & Sports Complex, Mount Pleasant Ice Arena.

The profiled facilities have an average of seven (7) basketball courts or 11 volleyball courts. The largest facilities in terms of number of basketball courts include Virginia Beach Sports Center, Henrico Sports & Events Center, and Spooky Nook Sports which each have 10 or more.

The average number of turf fields at the profiled facilities is three (3). Facilities with the highest number of indoor turf fields include Spooky Nook Sports, Crown Sports Center, and Virginia Beach Fieldhouse with 6 turf fields each.

The average amount of ice sheets among the profiled facilities is 2. The Gardens Ice House, Klick Lewis Arena, Rockville Ice Arena, and Jersey Shore Arena have the most ice sheets among the profiled set with three (3) each.

Summary of Regional Indoor Sports Facilities							
Facility	Location	Miles From Site	Square Feet	Basketball Courts	Volleyball Courts	Ice Sheets	Turf Fields
Michael & Son Rockville Sportsplex	Rockville, MD	40	63,000	3	6		3
Piney Orchard Ice Arena	Odenton, MD	40	n/a			2	
Ice World	Abingdon, MD	40	65,000			2	
The Gardens Ice House	Laurel, MD	40	150,000			3	
Rockville Ice Arena	Rockville, MD	50	66,200			3	
Adventist HealthCare Fieldhouse	Boys, MD	55	66,000	8	8		2
Athletic Republic Capitol Region	District Heights, MD	60	100,000	8	16		2
Spooky Nook Sports	Manheim, PA	65	700,000	10	10		6
Hagerstown Fieldhouse	Hagerstown, MD	65	114,000	4	8		2
The St. James	Springfield, VA	70	450,000	4		2	1
ION: The Rinks at Compass Creek	Leesburg, VA	80	90,000			2	
Klick Lewis Arena	Annville, PA	80	125,000			3	
Ashburn Ice House	Ashburn, VA	85	n/a			2	
Crown Sports Center	Fruitland, MD	135	125,000	2	4		6
Henrico Sports & Events Center	Glen Allen, VA	155	185,000	12	24		
Sportika	Manalapan Township, NJ	170	170,000	7	4		1
Jersey Shore Arena	Wall Township, NJ	180	107,810			3	
Basketball City	New York, NY	205	55,000	7			
Boo Williams Sportsplex	Hampton, VA	230	135,000	8	12		
Bridge Sports Complex (WesBanco Fieldhouse)	Bridgeport, WV	240	56,000	6			1
UPMC Lemieux Sports Complex	Cranberry Township, PA	260	185,000			2	
Virginia Beach Sports Center	Virginia Beach, VA	265	285,000	12	24		
Virginia Beach Fieldhouse	Virginia Beach, VA	265	175,000	4	8		6
Average		125	165,143	7	11	2	3

Notes: UPMC Lemieux Sports Complex is the practice home of the Pittsburgh Penguins.

Highlight indicates located in Maryland.

n/a denotes not available.

Sorted by distance.

Source: Individual facility websites.

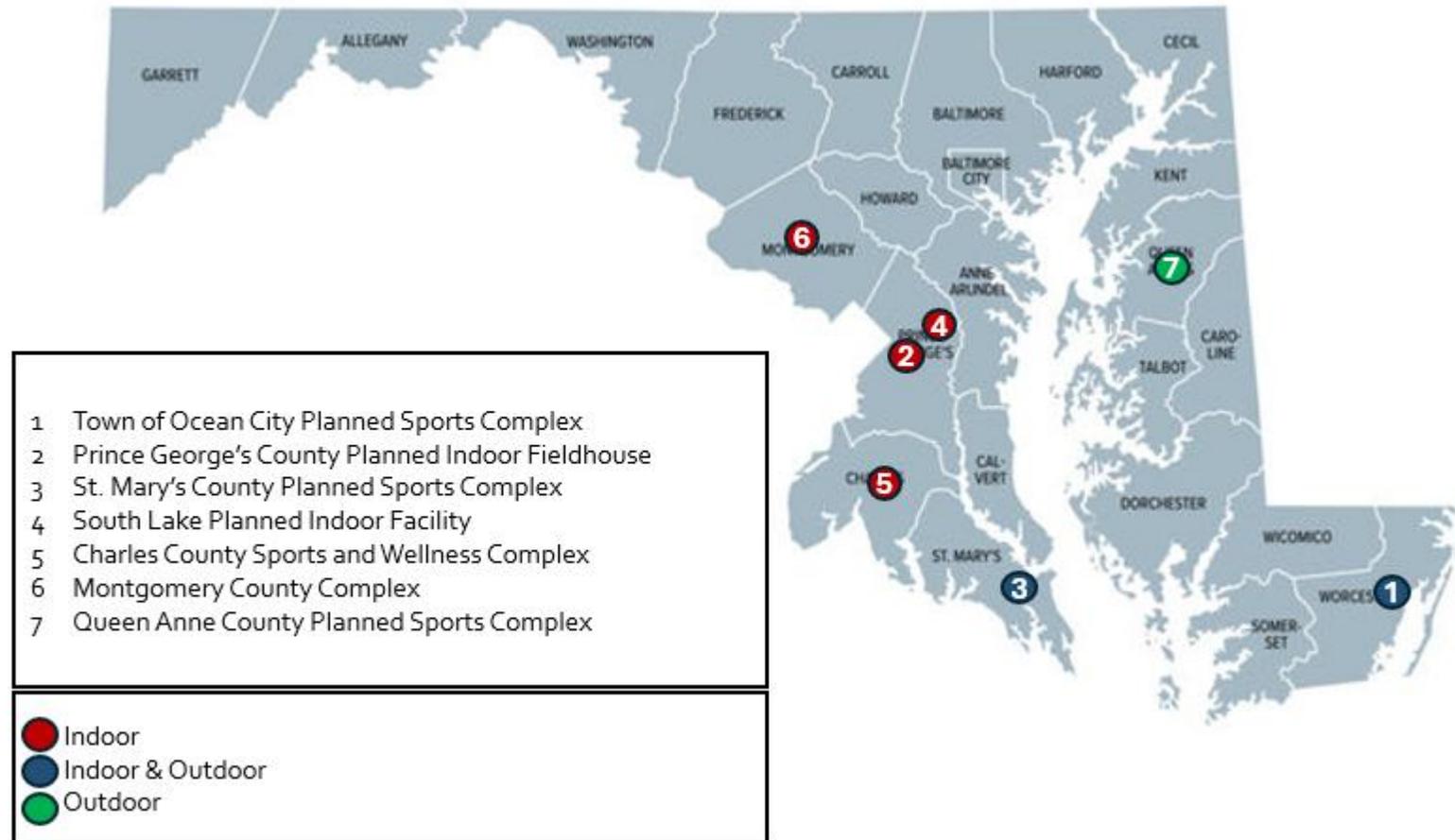
Potential Additions to Supply of Sports Facilities in the State

The following summarizes several proposed/planned sports facilities in the State which is not meant to be an all-inclusive list of proposed/planned sports facilities. These potential developments are in various stages of the planning process.

- The Town of Ocean City is planning for development of a 95-acre sports complex west of Stephen Decatur High School in Berlin. The proposed facility could include up to 10 tournament-grade multipurpose fields, walking trails, playgrounds, concessions, and restrooms, and an indoor facility with a minimum of eight courts.
- Prince George's County is contemplating development of an indoor sports-tourism facility with a minimum of 12 basketball courts and other amenities.
- St. Mary's County is in the planning stages of developing a new sports complex. Preliminary plans include an indoor court facility ranging from approximately 100,000 SF to 135,000 SF and eight to ten outdoor fields.
- The Maryland Lacrosse League (MDLL) plans to construct a comprehensive sports complex in southern Anne Arundel County, featuring an indoor facility and turf field(s), with additional amenities such as pickleball courts, golf simulators, and on-site physical therapy services. The project is in early planning, with the location yet to be finalized, and MDLL actively seeking partners to support the community-focused development.
- Montgomery County is in the early stages of evaluating the merits of developing an indoor sports facility to attract sports tourism events.
- Queen Anne County is considering the development of a new sports complex which may consist of outdoor fields, a baseball stadium, and other amenities.
- Charles County is currently evaluating the merits of developing a proposed Sports and Wellness Center that would be a part of a sports, arts, and entertainment district. The facility could include a 50-meter competition pool, warm-water therapy pools, splash pad, and other aquatic amenities with future expansions for indoor sports, including volleyball, track and field, pickleball, etc.
- The new South Lake development in Bowie is a \$1.3 billion mixed-use project currently under development that combines large-scale retail, residential neighborhoods, and a tournament-grade sports complex to create a destination-driven community and regional economic anchor. Future plans call for a 160,000 SF indoor sports facility as part of the development, which would be located near the existing Liberty Sports Park.
- Hagerstown Community College is currently evaluating the merits of improving and/or expanding their athletic facilities. While the primary focus is to better accommodate the college's internal needs, it is envisioned that the facilities could also host community sports activities and tournaments.
- Frostburg State University is considering development of a new regional complex which may include an indoor sports center, upgraded outdoor athletic fields, and enhancements to the Cordts Physical Education Center.

Potential Additions to Supply of Sports Facilities in the State (cont'd)

For informational purposes, the following map depicts select planned sports facilities in the State. While there are additional planned facilities, those below are shown because they are envisioned to primarily target sports-tourism events. As shown, most potential developments would include an indoor sports facility either envisioned as a standalone venue or as part of a larger development with outdoor fields.



Planned Additions to Supply of Sports Facilities in Virginia

The following summarizes the planned supply of sports facilities in Virginia.

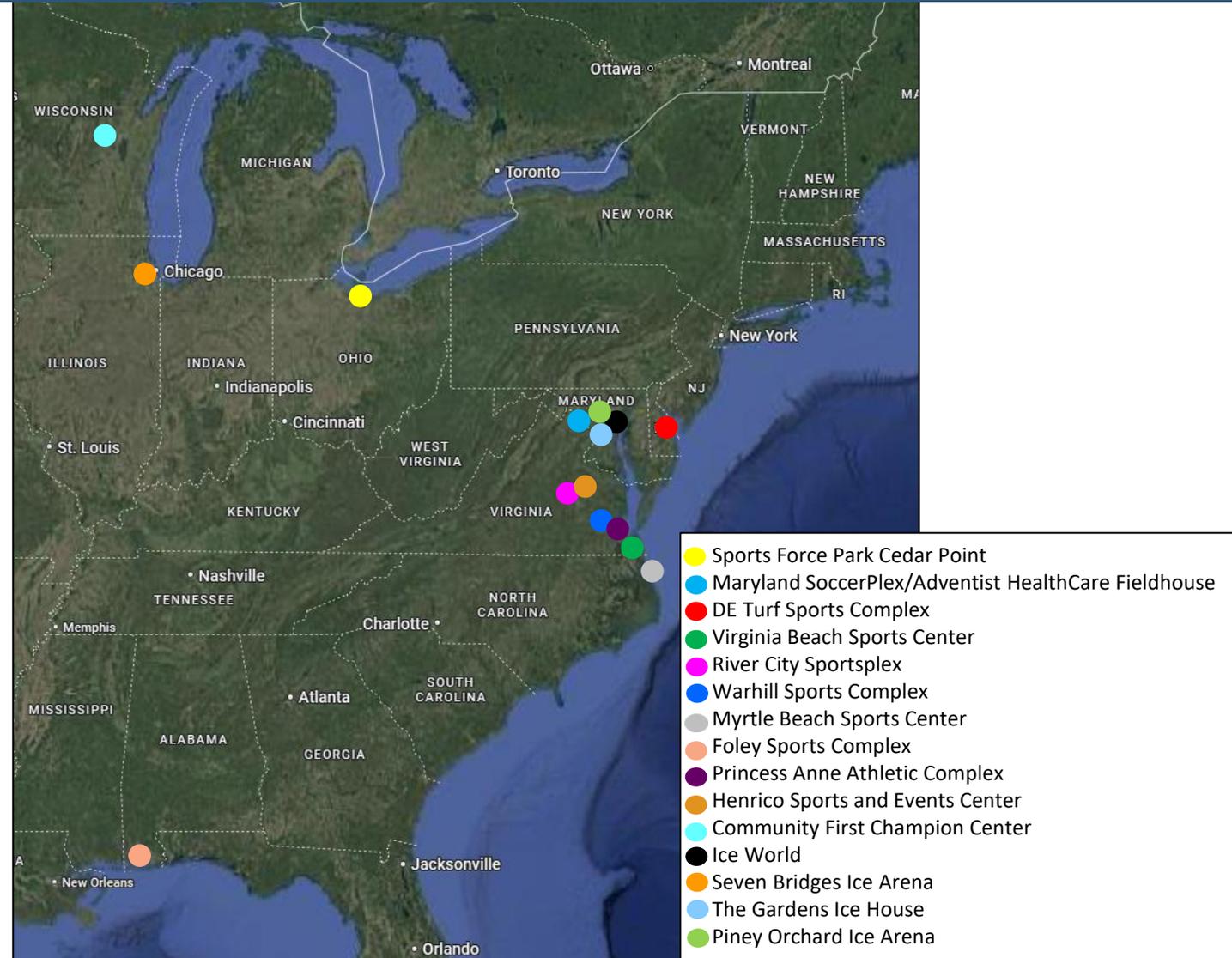
- The 165,000 SF Pulaski County Sportsplex is currently under construction and will offer eight indoor basketball/volleyball/futsal courts, turf soccer fields, pickleball courts, batting cages, indoor golf simulation, fitness rooms, a walking and sprint track, programming space, a restaurant, and more. The facility is expected to open by summer 2026 to support local recreation and attract regional and national sports tourism events.
- The Colosseum Sports Resort is an innovative multi-sport and recreation complex that is anticipated to open in Stafford County, Virginia in 2028 or 2029. The estimated cost is \$140 million and the project will combine state-of-the-art sports venues, upscale dining, retail outlets, health and wellness services and premium hospitality.
- The City of Williamsburg, James City County, and York County are jointly developing a 200,000 SF regional indoor sports center, slated to open in 2026 near the Colonial Williamsburg Visitor Center. Designed for both tourism and local use, the facility will feature 12 courts for basketball, volleyball, and pickleball, indoor turf fields, and climbing amenities, serving local programs during the week and hosting regional/national tournaments on weekends.



Comparable Facilities

This section summarizes available data on various comparable sports facilities including ownership/management structure, building program elements and operating characteristics. This analysis offers context relative to physical and operating attributes at comparable facilities which is helpful in assessing market potential for the proposed new sports tourism facility at the Reisterstown Regional Park. Some of the profiled facilities may be both competitive and comparable with the proposed new sports tourism facility. Information from these profiled facilities was obtained from direct interviews with management as well as secondary sources.

The facilities depicted on the map were selected based on their similarity in terms of market attributes, market focus and/or building program elements to that of the proposed new sports tourism facility at the Reisterstown Regional Park. Several of the profiled facilities are part of a larger sports complex that includes both indoor and outdoor sports facilities.



Comparable Facilities (cont'd)

The following table summarizes comparable facilities in terms of programmatic elements and operating structure. Facilities shown either have outdoor fields, indoor courts or ice sheets, or a combination of those programmatic elements.

As shown below, eight of the facilities are operated privately, four are operated by a public entity and three are operated by a non-profit. Profiled facilities average 12 rectangular grass fields, 8 rectangular turf fields and 9 diamond fields. Most of the profiled outdoor fields have lights. Several of the profiled facilities have fields with flexibility to accommodate both diamond and rectangular field sports on the same surface. The profiled comparable indoor facilities have an average of nine (9) basketball courts or 16 volleyball courts. In terms of ice, the profiled facilities have an average of two sheets. The pages that follow provide further details for each of these facilities in terms of building program, usage, etc.

Summary of Comparable Sports Facilities														
Facility	Location	Operator	Total Acres/SF	Outdoor Elements								Indoor Elements		
				Rectangular Fields				Diamond Fields				Number of Ice Rinks	Number of Basketball Courts	Number of Volleyball Courts
				Number of Grass Fields	Number of Turf Fields	Total	Lighted	Number of Grass Fields	Number of Turf Fields	Total	Lighted			
Maryland SoccerPlex/Adventist HealthCare Fieldhouse	Boys, MD	Non-profit	162 / 66,000	21	3	24	6						8	8
River City Sportsplex	Midlothian, VA	Public	115		16	16	16							
Warhill Sports Complex	Williamsburg, VA	Public	n/a	8	7	15		8		8	4			
DE Turf Sports Complex	Frederica, DE	Non-profit	100		12	12	12							
Princess Anne Athletic Complex	Virginia Beach, VA	Public	n/a	4	4	8	4	8		8	8			
Sports Force Park/Cedar Point Sports Center	Sandusky, OH	Private	57 / 145,000		8	8	5			12	12	5	10	20
Foley Sports Tourism Complex	Foley, AL	Public	n/a / 90,000	16			16						6	12
Community First Champion Center	Appleton, WI	Non-profit	164,000									2	8	8
Ice World	Abingdon, MD	Private	65,000									2		
Seven Bridges Ice Arena	Woodridge, IL	Private	114,000									2		
The Gardens Ice House	Laurel, MD	Private	150,000									3		
Piney Orchard Ice Arena	Odenton, MD	Private	n/a									2		
Virginia Beach Sports Center	Virginia Beach, VA	Private	285,000										12	24
Mrytle Beach Sports Center	Mrytle Beach, SC	Private	100,000										8	16
Henrico Sports and Events Center	Glen Allen, VA	Private	185,000										12	24
Average				12	8	14	10	8	12	9	6	2	9	16

Source: Facility websites.

Comparable Facilities (cont'd)

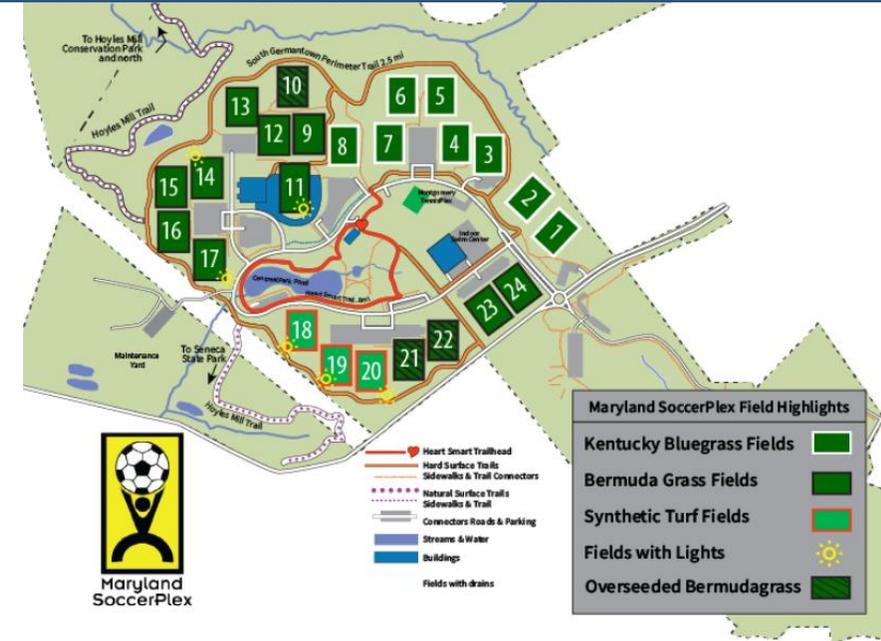
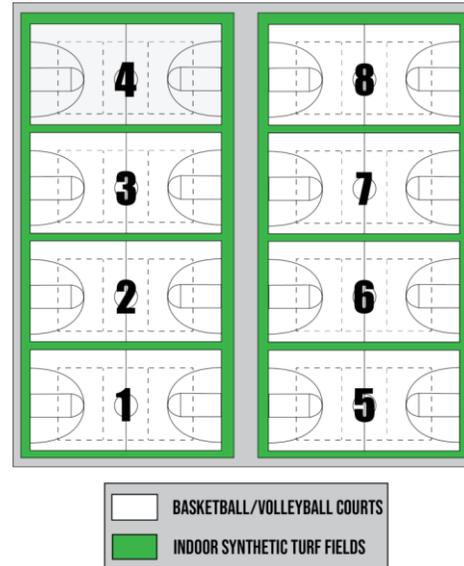
Maryland SoccerPlex/Adventist HealthCare Fieldhouse

The Maryland SoccerPlex is a 24-field, 162-acre premier sports complex in Boyds, Maryland, featuring high-quality grass and turf fields, an indoor fieldhouse, and extensive amenities that host regional and national tournaments, league play, and community programs year-round. The complex was built by the non-profit Maryland Soccer Foundation (MSF) on 162 acres of County-owned land. The MSF has a 40-year lease agreement with the County and is responsible for operating and maintaining the complex at the MSF's sole expense.

The outdoor complex has 21 outdoor grass rectangular fields and 3 turf rectangular fields. The fields host over 20 major soccer and lacrosse tournaments annually.

The Adventist HealthCare Fieldhouse, within the Maryland SoccerPlex complex, is a 66,000 SF indoor sports and events facility. The facility has 8 basketball courts as well as office space, concessions and other support elements. In November, two synthetic turf fields are rolled out for indoor soccer, lacrosse, field hockey, baseball, and rugby. The indoor facility hosts approximately 30 tournaments annually in various sports.

This entire complex hosts more than 1 million visitors annually.



Source: Facility Website.

Comparable Facilities (cont'd)

River City Sportsplex

The River City Sportsplex in Midlothian, Virginia is a 115-acre outdoor sports complex that is owned and operated by Chesterfield County Parks & Recreation. The facility features 16 lighted synthetic turf fields, restrooms, concessions, and large parking areas, making it one of the largest all-turf facilities in the U.S. It serves as a premier tournament destination for sports such as soccer, field hockey, and lacrosse. According to facility management, the Sportsplex hosts approximately 30 tournaments annually, along with community recreational uses.

The Sportsplex is supported by County staff along with seasonal event personnel and vendor partnerships. The County has invested heavily in the facility, including a recent \$9 million expansion that added four new fields in 2024, funded through the 2022 bond referendum. Future plans include "The Park at River City Sportsplex," a \$17+ million project set to open in 2026 with a destination playground, splash pad, fitness areas, trails, and additional amenities to enhance the visitor experience and expand community use.



Source: County Website.

Comparable Facilities (cont'd)

Warhill Sports Complex

Warhill Sports Complex, a major multi-sport facility in Williamsburg, Virginia, is owned and operated by James City County.

The complex includes a mix of synthetic turf and natural grass fields including six synthetic multi-use turf fields, four premier full-size grass soccer fields, four intermediate grass fields, the 3,000-seat multi-use Sanford B. Wanner Stadium and an eight-field baseball complex. Supporting amenities include two concession buildings, restrooms, playgrounds, lighted outdoor basketball courts, ponds for fishing, paved and wooded multi-use trails, picnic areas, and other passive recreational features.

In recent years, key improvements at Warhill Sports Complex included replacement of the artificial turf on all seven turf fields (six multi-use plus the stadium), installing "Cool Play" infill to reduce surface temperatures, field expansions for goal/common areas, and infrastructure work to improve drainage and aggregate base. Also, a new outdoor fitness court opened in October 2024 adjacent to the basketball courts.

There is a proposed major Capital Improvement Program (CIP) project for fiscal years 2026-2030 to expand the baseball/softball complex (synthetic fields, added parking, restrooms) with an expected project value reported around \$13.7 million.



Source: Google Maps.

Comparable Facilities (cont'd)

DE Turf Sports Complex

DE Turf Sports Complex in Frederica, Delaware is a privately owned, all-synthetic 12-field sports campus and championship stadium that serves as Delaware's premier tournament destination for soccer, lacrosse, and multi-sport events. The complex is owned and operated by the Kent County Regional Sports Complex Corporation. According to facility management, the Complex will host more than 58 tournament days in 2025 that attract hundreds of teams and draw thousands of visitors on peak weekend days. The venue routinely hosts large regional and national events, benefiting from its centralized Mid-Atlantic location with strong access to Maryland, New Jersey, Pennsylvania, and Virginia markets.

DE Turf was intentionally designed as a tournament-first facility, featuring clustered field pods, a championship stadium, premium lighting, and ample warm-up space to maximize scheduling efficiency and team throughput. The complex includes on-site concessions, vendor areas, athletic training services, and dedicated tournament operations space.

In 2024, a state tourism grant was received to expand capacity, including a planned increase of stadium seating (from approximately 1,000 to 3,000) and a new 5,500 SF tournament facility to support larger regional/national events.



Source: Facility Website.

Comparable Facilities (cont'd)

Princess Anne Athletic Complex

The Princess Anne Athletic Complex in Virginia Beach, Virginia is a large multi-sport facility that is owned by the City of Virginia Beach and operated by Virginia Beach Parks & Recreation.

The Complex includes eight tournament-quality, lighted softball/baseball diamonds, plus eight multipurpose fields that support sports like football and soccer. Of these, four are lighted synthetic turf and four are Hybrid Bermuda grass. Amenities include two full-service concession stands, two gazebos, parking for 830 cars and other supporting infrastructure. The Complex is used for local leagues, tournaments and multi-sport events. Tournaments at the complex attract more than 100,000 in annual attendance.

Significant facility upgrades were completed in 2019, converting four fields to synthetic playing surfaces, installing new lighting, electronic scoreboards, upgrading parking, expanding the maintenance building, improving access drives, and adding stormwater retention features. Funding was recently approved to transition some of the grass fields to artificial turf.



Source: City website.

Comparable Facilities (cont'd)

Sports Force Park / Cedar Point Sports Center

Sports Force Parks at Cedar Point Sports Center is a 57-acre youth sports and tournament complex in Sandusky, Ohio. It was developed via a public-private partnership involving Erie County, Cedar Point, and Sports Force Parks.

The facility comprises multiple synthetic-turf multi-purpose fields (capacity for 12 synthetic diamonds or 8 full-size soccer fields), four NCAA-regulation baseball fields, a championship baseball/softball stadium, training areas, and an ADA-accessible field. Supporting amenities include a "great lawn" with miniature golf, playgrounds, ropes/trampoline/sky trail attractions, concessions, and family entertainment features. The indoor Cedar Point Sports Center offers 10 basketball courts or 20 volleyball courts, along with other amenities.

According to facility management, the complex hosts approximately 60 annual tournaments, with 2,300 teams, and over 300,000 overnight visitors.



Source: Facility Website.



Comparable Facilities (cont'd)

Foley Sports Tourism Complex

The Foley Sports Tourism Complex in Alabama is owned by the City and operated by the Sports Tourism Department. The mission of the Sports Tourism Department is to attract, create and host high-quality events for all ages to increase economic vitality, improve quality of life and provide a unique and memorable experience that brands Foley as a nationally recognized sports destination.

The complex includes 16 multi-purpose outdoor fields including a championship field with seating for up to 1,000 people. The fields opened in 2016 and each offer a natural grass playing surface and lights. Foley Event Center is part of the Foley Sports Tourism Complex. The 90,000 SF facility offers six basketball courts or 12 volleyball courts. The facility also offers five meeting rooms, three concession/vending areas and two mezzanines overlooking the main floor. Sporting events hosted at the facility include volleyball, basketball, archery, gymnastics, cheerleading and more. The facility also hosts non-sporting events such as meetings, graduations and exhibits.

The complex is adjacent to the OWA which is a 520-acre entertainment and amusement park destination. The OWA features a 150-room hotel and various retail, dining and entertainment venues for visitors. The complex is also proximate to the Tanger Outlets, which consists of over 100 stores, and several beaches.

According to facility management, the Foley Sports Tourism Complex (both the indoor facility and outdoor fields) hosts around 85 events and over 200,000 attendees annually.



Source: Facility Website.

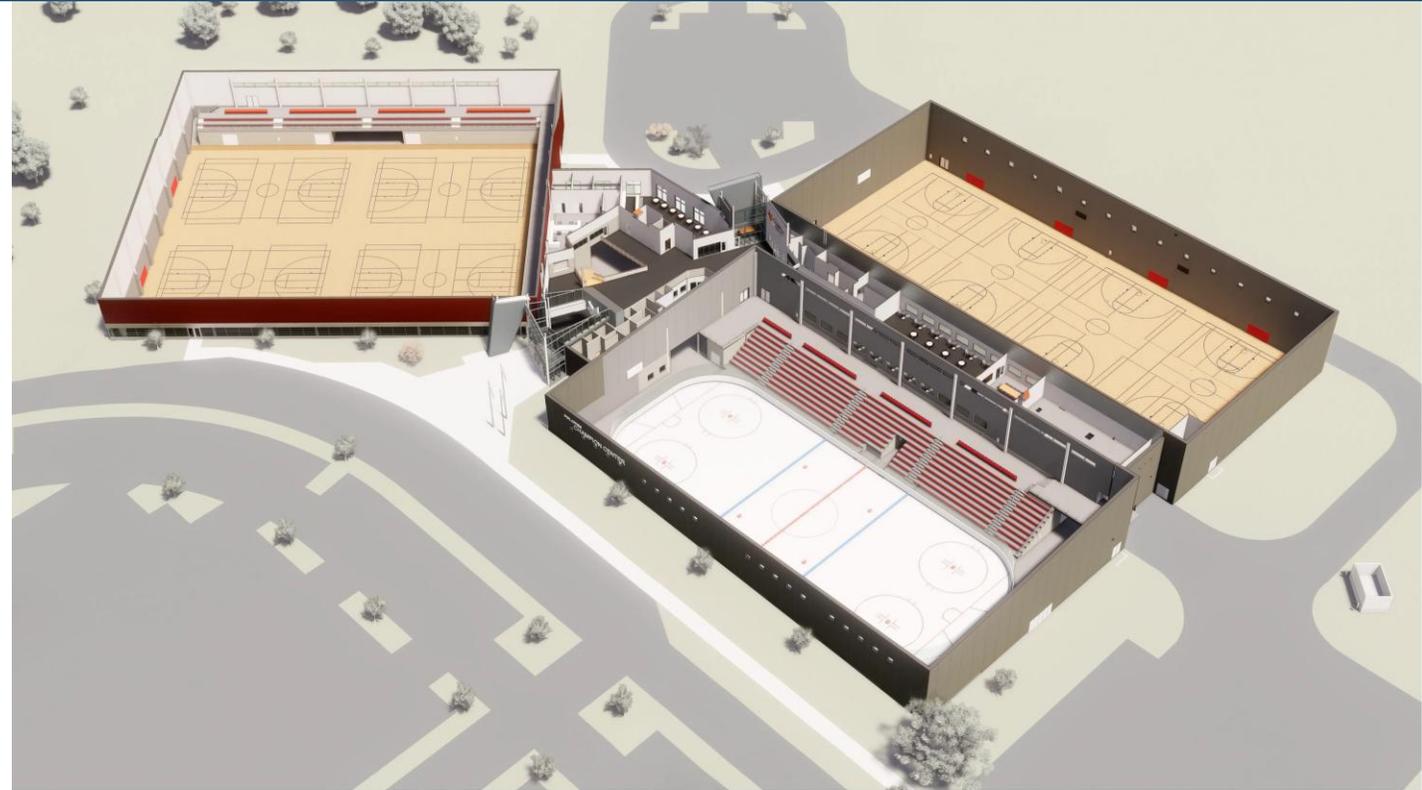
Comparable Facilities (cont'd)

Community First Champion Center

The Community First Champion Center is a 164,000 SF indoor sports facility in Appleton, Wisconsin. The facility is owned by the Town of Grand Chute and operated by Fox Cities Sports Development Inc., a nonprofit organization.

The Center features three primary competition areas: the Mary Beth Nienhaus Fieldhouse, which can accommodate four basketball courts or eight volleyball courts with seating for over 800 spectators; the BayCare Clinic Seasonal Arena, which can host four basketball courts or convert into an NHL-sized ice rink with seating for 300; and the Main Ice Rink, an NHL-sized ice rink with seating for 1,000. These spaces support a variety of sports, including basketball, volleyball, ice hockey, figure skating, gymnastics and more. The mission of the complex is to focus on attracting sports teams from outside the local area to increase tourism. Local groups also have access to the facility.

In recent years, the Center has hosted more than 60 tournaments annually, attracting nearly 100,000 participants and spectators.



Source: Facility Website.

Seasonal Courts Configuration



Comparable Facilities (cont'd)

Ice World

Ice World is a 65,000 SF facility in Abingdon, Maryland. The facility is a year-round ice arena featuring two NHL-regulation rinks, eight team locker rooms, seating for up to 300 spectators, a full-service snack bar, and an on-site Pro Shop. The facility provides a broad range of skating programs, private lessons, camps, and both recreational and travel hockey opportunities.

It serves as the home base for the North Stars Hockey Club, Chesapeake Figure Skating Club, Chesapeake Synchronized Skating, and several additional youth and adult hockey organizations. Although capable of hosting tournaments, the facility primarily supports local community and club activities. Ice World is privately owned and operated.



Source: Facility Website.

Comparable Facilities (cont'd)

Seven Bridges Ice Arena

Seven Bridges Ice Arena is a 114,355 SF complex located in Woodridge, Illinois that features an Olympic-size rink, an NHL-size rink, and 13,760 SF indoor turf field. The facility includes eight locker rooms, a pro shop, and an on-site full-service restaurant and bar.

It hosts a wide range of organizations and programs, including Team Illinois, Benet Academy Hockey Club, Bridgedale Academy Hockey, Naperville North Hockey, Huskies Hockey Club, VMSA Soccer, and the Windy City Curling Club. Additional offerings include lessons, Stick-N-Puck sessions, freestyle skating, public skating, and tournaments.

Secondary sources report that the venue attracts approximately 1.1 million visitors annually. The facility is privately owned and operated.



Source: Social media.

Comparable Facilities (cont'd)

The Gardens Ice House

The Gardens Ice House, a 150,000 SF, year-round ice sports complex in Laurel, Maryland, is one of the largest facilities of its kind in the Mid-Atlantic region. The venue features multiple ice surfaces, including an Olympic-size rink, two NHL-size rinks, and a seasonal outdoor rink known as Whitey's Pond, along with supporting amenities such as a fitness center, pro shop, café, and ample locker room and meeting space.

The facility offers a wide range of programming, including skating lessons, youth and adult hockey leagues, figure skating, curling, freestyle sessions, and public skating. It also serves as a home base for numerous hockey clubs, tournaments, and community events. Open 365 days a year, it functions as a central hub for regional ice sports and recreational activities.



Source: Social media.

Comparable Facilities (cont'd)

Piney Orchard Ice Arena

Located in Odenton, Maryland, Piney Orchard Ice Arena is a year-round, dual-sheet ice facility featuring two NHL-size rinks, spectator seating, multipurpose space, and supporting amenities.

Owned by Black Bear Sports Group, the arena hosts a wide range of programs, including public skating, learn-to-skate classes, figure skating, adult leagues, and hockey development sessions. It serves as the home of the Maryland Black Bears (NAHL), Team Maryland (EHL), and several youth and adult hockey organizations. While the facility is mostly used for local programs, it also hosts tournaments and showcases.

The venue also offers space for meetings, events, and community activities, making it a central hub for ice sports in the region.



Source: Facility Website.

Comparable Facilities (cont'd)

Virginia Beach Sports Center

The Virginia Beach Sports Center is a 285,000 SF indoor sports facility (195,000 SF of programmable space) in Virginia Beach that is situated near the Atlantic Oceanfront. The facility is located across the street from the Virginia Beach Convention Center, which has a 150,000 SF column-free exhibit hall, and approximately 10 miles from the existing Virginia Beach Field House.

The Center was developed through a public-private partnership to enhance sports tourism and provide year-round recreational opportunities. The Sports Facilities Companies took over operations of the facility in 2024.

The Center features 12 basketball courts that can be converted into 24 volleyball courts and a 200-meter hydraulically banked indoor track. It also includes meeting rooms, VIP suites, and flexible event spaces. The Center hosts approximately 60 events per year, including tournaments/competitions in basketball, volleyball, track and field, wrestling, and other sports.



Source: Facility Website.

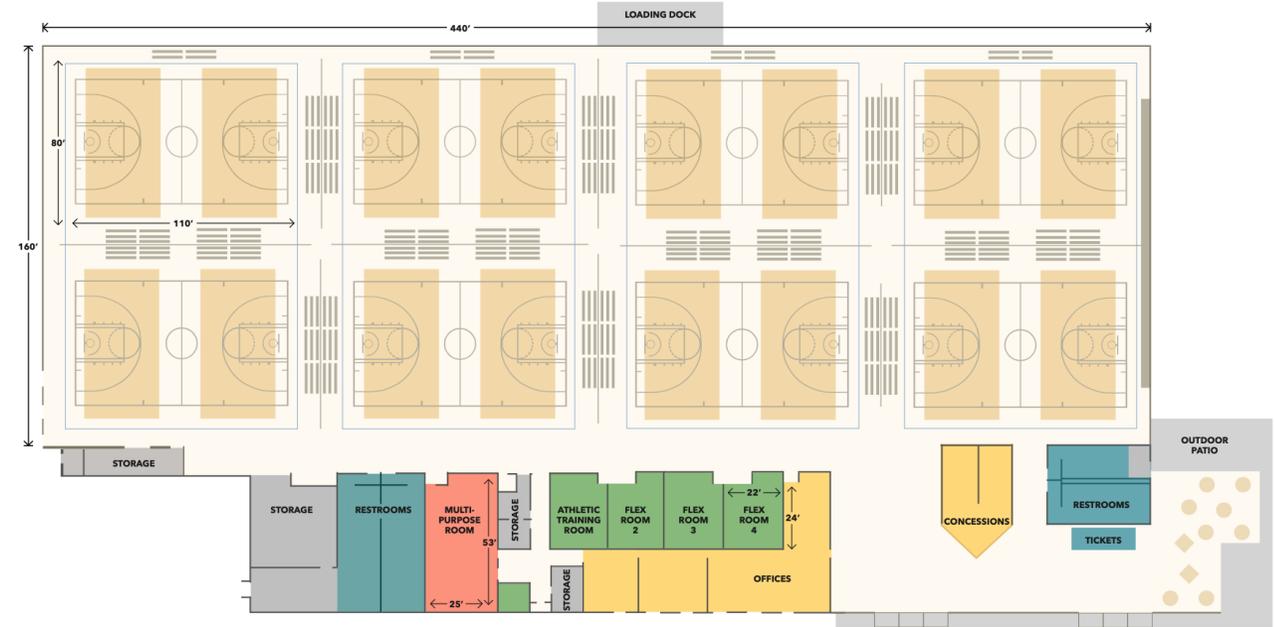
Comparable Facilities (cont'd)

Myrtle Beach Sports Center

The Myrtle Beach Sports Center is located adjacent to the Myrtle Beach Convention Center in South Carolina. Opened in March 2015, the 100,000 SF indoor sports facility includes eight basketball courts and 16 volleyball courts spread over 72,000 SF of column-free hardwood space. The venue was designed to host court sports, wrestling, gymnastics, table tennis, pickleball and other sporting events as well as trade shows. The facility is owned by the City of Myrtle Beach and operated by The Sports Facilities Companies (SFC).

The facility hosts around 35 events annually. According to secondary sources, it is estimated that operations of the center have generated \$250 million in economic impact over the last decade.

In 2023, the facility completed a full wood floor resurfacing, ensuring optimal playing conditions for basketball and volleyball events. Additionally, energy-efficient LED lighting was installed throughout the venue, reducing operational costs and environmental impact.



Source: Facility Website.

Comparable Facilities (cont'd)

Henrico Sports and Events Center

The Henrico Sports & Events Center in Glen Allen, Virginia is a state-of-the-art facility that opened in 2023. The facility was designed to enhance Henrico County's sports tourism and community engagement. It is owned by the Henrico Sports & Entertainment Authority and operated by Legends Global.

The Center spans 185,000 SF, featuring 12 basketball courts or 24 volleyball courts, a 39,000 SF event space with seating for 3,500 spectators, and 4 meeting rooms for various events, including the Atlantic 10 Women's Basketball Tournament in 2024 and 2025.

Henrico Sports and Events Center hosts approximately 70 sporting events annually that attract over 400,000 in attendance. According to secondary sources, the Center is estimated to generate over \$100 million annually from its sports and events programming. In addition to sports tourism, the facility serves as an event space for the community hosting graduation and other activities throughout the year.



Source: Facility Website.

Sports Participation Trends

Potential demand for any sports facility is closely tied to broader industry dynamics and the characteristics of its target market segments. The competitive youth and adult amateur sports industry continues to represent a significant market opportunity encompassing a wide range of sports, age groups, and participation levels. Notably, demand for sports tourism events tends to be less sensitive to economic fluctuations, as participants and accompanying family members are typically willing to travel considerable distances to engage in their preferred sports.

In recent years, an increasing number of communities have developed stand-alone, sports tourism-oriented complexes designed to host multiple games and tournaments, recognizing their substantial value as tourism generators. Research suggests that successful destinations often benefit from a strong volunteer network and the presence of elite-level leagues that help sustain and promote tournament activity, thereby driving overnight visitation.

Sports participation rates serve as a key indicator of demand for sports facilities. As participation grows, so too does the need for venues capable of supporting that activity. The following analysis examines trends in participation across various indoor and outdoor sports, including annual participation levels, frequency of play, and geographic distribution.

Data for this analysis was obtained from the Sports Business Research Network (SBRnet), a leading provider of sports marketing research in the United States. SBRnet offers a comprehensive perspective on the sports business landscape through syndicated and proprietary research, industry reports, and licensed publications. The data is based on online surveys of more than 18,000 participants nationwide conducted by the Sports & Fitness Industry Association (SFIA).



Sports Participation Trends (cont'd)

Total and Core Participation

This section presents national statistics related to sports that represent potential user groups for the proposed sports tourism facility. Participation data is provided for the years 2018 through 2023, the most recent year available. For the purposes of this analysis, a “participant” is defined as an individual aged six or older who engages in a given sport or activity at least once per year. “Core participants” are defined as individuals who participate more than 50 times annually.

As shown in the adjacent table, basketball recorded the highest total participation levels across all profiled years, while rugby reflected the lowest. From 2022 to 2023, total participation (casual and core) increased across nearly all profiled sports, with the exception of Ultimate Frisbee and Rugby. Pickleball demonstrated the largest year-over-year increase in participation, aligning with SFIA reports identifying it as the fastest-growing sport in the United States. Other sports experiencing significant growth included ice skating, volleyball and ice hockey.

U.S. Participation in Select Sports - Population Aged 6+ (in thousands)																	
Sport	2018	2019	2020	2021	2022	2023	2022-2023		Sport	2018	2019	2020	2021	2022	2023	2022-2023	
							Change	Change									
Basketball (Total)	24,225	24,917	27,753	27,135	28,149	29,725	5.6%		Flag Football (Total)	6,572	6,783	7,001	6,889	7,104	7,266	2.3%	
Basketball (Casual) <49 times per year	9,335	9,669	11,962	11,019	13,000	14,405	10.8%		Flag Football (Casual) <49 times per year	3,573	3,794	4,287	4,137	4,573	4,710	3.0%	
Basketball (Core) >50 times per year	14,890	15,248	15,791	16,116	15,149	15,320	1.1%		Flag Football (Core) >50 times per year	2,999	2,989	2,714	2,752	2,531	2,556	1.0%	
Cheerleading (Total)	3,841	3,752	3,308	3,465	3,507	3,797	8.3%		Tackle Football (Total)	5,157	5,107	5,054	5,228	5,436	5,618	3.3%	
Cheerleading (Casual) <49 times per year	2,039	1,934	1,931	2,030	2,092	2,360	12.8%		Tackle Football (Casual) <49 times per year	2,258	2,413	2,390	2,642	3,120	3,278	5.1%	
Cheerleading (Core) >50 times per year	1,802	1,817	1,377	1,435	1,415	1,438	1.6%		Tackle Football (Core) >50 times per year	2,898	2,694	2,665	2,586	2,316	2,340	1.0%	
Gymnastics (Total)	4,770	4,699	3,848	4,268	4,569	4,758	4.1%		Touch Football (Total)	5,517	5,171	4,846	4,884	4,843	4,949	2.2%	
Gymnastics (Casual) <49 times per year	3,047	3,004	2,438	2,787	3,095	3,315	7.1%		Touch Football (Casual) <49 times per year	3,313	3,065	2,990	3,171	3,201	3,301	3.1%	
Gymnastics (Core) >50 times per year	1,723	1,695	1,410	1,482	1,473	1,443	-2.0%		Touch Football (Core) >50 times per year	2,204	2,105	1,856	1,713	1,642	1,648	0.4%	
Soccer (Indoor - Total)	5,233	5,336	5,440	5,408	5,495	5,909	7.5%		Baseball (Total)	15,877	15,804	15,731	15,587	15,478	16,655	7.6%	
Soccer (Indoor - Casual) <49 times per year	2,452	2,581	3,377	3,054	3,144	3,411	8.5%		Baseball (Casual) <49 times per year	6,563	6,655	8,089	7,392	7,908	8,934	13.0%	
Soccer (Indoor - Core) >50 times per year	2,782	2,755	2,063	2,354	2,351	2,498	6.3%		Baseball (Core) >50 times per year	9,314	9,149	7,643	8,195	7,570	7,722	2.0%	
Soccer (Outdoor - Total)	11,405	11,913	12,444	12,556	13,018	14,074	8.1%		Lacrosse (Total)	2,098	2,115	1,884	1,892	1,875	1,979	5.5%	
Soccer (Outdoor - Casual) <49 times per year	6,430	6,864	8,360	7,586	7,666	8,706	13.6%		Lacrosse (Casual) <49 times per year	1,036	1,021	902	1,009	999	1,123	12.4%	
Soccer (Outdoor - Core) >50 times per year	4,975	5,050	4,084	4,970	5,352	5,368	0.3%		Lacrosse (Core) >50 times per year	1,061	1,094	982	883	876	850	-3.0%	
Volleyball (Court - Total)	6,317	6,487	5,410	5,849	6,092	6,905	13.3%		Pickleball (Total)	3,301	3,460	4,199	4,819	8,949	13,582	51.8%	
Volleyball (Court - Casual) <49 times per year	2,867	2,962	2,204	2,465	2,798	3,481	24.4%		Pickleball (Casual) <49 times per year	2,011	2,207	2,835	3,454	6,647	8,736	31.4%	
Volleyball (Court - Core) >50 times per year	3,450	3,525	3,206	3,384	3,293	3,425	4.0%		Pickleball (Core) >50 times per year	1,290	1,253	1,364	1,365	2,302	4,846	110.5%	
Wrestling (Total)	1,908	1,944	1,931	1,937	2,036	2,121	4.2%		Rugby (Total)	1,560	1,392	1,242	1,238	1,166	1,112	-4.6%	
Wrestling (Casual) <49 times per year	1,160	1,189	1,239	1,290	1,452	1,589	9.4%		Rugby (Casual) <49 times per year	998	835	807	778	758	729	-3.8%	
Wrestling (Core) >50 times per year	748	755	692	647	585	532	-9.1%		Rugby (Core) >50 times per year	562	557	435	460	408	384	-5.9%	
Martial Arts (Total)	5,821	6,068	6,064	6,186	6,355	6,610	4.0%		Fast Pitch Softball (Total)	2,303	2,242	1,811	2,088	2,146	2,323	8.2%	
Martial Arts (Casual) <49 times per year	1,991	2,178	2,679	2,728	3,114	3,481	11.8%		Fast Pitch Softball (Casual) <49 times per year	1,084	993	650	934	1,002	1,123	12.1%	
Martial Arts (Core) >50 times per year	3,830	3,890	3,385	3,458	3,241	3,130	-3.4%		Fast Pitch Softball (Core) >50 times per year	1,219	1,250	1,162	1,154	1,144	1,201	5.0%	
Badminton (Total)	6,337	6,095	5,862	6,061	6,490	6,513	0.4%		Slow Pitch Softball (Total)	7,386	7,071	6,349	6,008	6,036	6,356	5.3%	
Badminton (Casual) <49 times per year	4,555	4,338	4,129	4,251	4,636	4,743	2.3%		Slow Pitch Softball (Casual) <49 times per year	3,281	3,023	2,753	2,729	2,666	2,939	10.2%	
Badminton (Core) >50 times per year	1,782	1,756	1,733	1,810	1,855	1,771	-4.5%		Slow Pitch Softball (Core) >50 times per year	4,105	4,048	3,596	3,279	3,370	3,417	1.4%	
Ultimate Frisbee (Total)	2,710	2,290	2,325	2,190	2,142	2,086	-2.6%		Ice Skating (Total)	9,721	9,460	9,857	9,481	10,086	11,438	13.4%	
Ultimate Frisbee (Casual) <49 times per year	1,852	1,491	1,476	1,441	1,438	1,523	5.9%		Ice Skating (Casual) <49 times per year	8,201	8,011	8,338	7,939	8,636	9,941	15.1%	
Ultimate Frisbee (Core) >50 times per year	858	799	849	749	703	563	-19.9%		Ice Skating (Core) >50 times per year	1,521	1,450	1,519	1,542	1,451	1,496	3.1%	
Track and Field (Total)	4,143	4,139	3,636	3,587	3,690	3,905	5.8%		Ice Hockey (Total)	2,447	2,357	2,270	2,306	2,278	2,496	9.6%	
Track and Field (Casual) <49 times per year	2,071	2,069	1,589	1,712	1,896	2,093	10.4%		Ice Hockey (Casual) <49 times per year	1,105	1,040	1,165	1,206	1,209	1,458	20.6%	
Track and Field (Core) >50 times per year	2,072	2,070	2,046	1,875	1,794	1,811	0.9%		Ice Hockey (Core) >50 times per year	1,342	1,317	1,105	1,101	1,068	1,038	-2.8%	

Sports Participation Trends (cont'd)

Participation by Geographic Region

SBRnet classifies Maryland as part of the South Atlantic Region, which also includes Florida, Washington, D.C., North Carolina, South Carolina, Georgia, Virginia, West Virginia, and Delaware. In 2023, the South Atlantic Region recorded the highest or second highest participation levels across all profiled sports, with the exception of ice hockey. Participation in ice hockey in the South Atlantic Region ranked 4th highest.

For informational purposes, the graphic below from SBRnet illustrates the breakdown of states included in each geographic region. This classification is consistent with that used by the U.S. Census Bureau.

New England	Middle Atlantic	East North Central	West North Central	South Atlantic	East South Central	West South Central	Mountain	Pacific
CT	NJ	IL	IA	DE	AL	AR	AZ	CA
ME	NY	IN	KS	FL	KY	LA	CO	OR
MA	PA	MI	MN	GA	MS	OK	ID	WA
NH		OH	MO	MD	TN	TX	MT	AK
RI		WI	NE	NC			NV	HI
VT			ND	SC			NM	
			SD	VA			UT	
				WV			WY	
				DC				

2023 Sports Total Participation by Geographic Region (% of Participants)							
Geographic Region	Flag Football	Lacrosse	Cheerleading	Gymnastics	Soccer (Outdoor)	Martial Arts	Tackle Football
South Atlantic	24%	22%	23%	23%	20%	22%	23%
Pacific	16%	14%	12%	13%	19%	17%	13%
Middle Atlantic	18%	25%	13%	14%	15%	16%	14%
East North Central	13%	11%	17%	16%	14%	14%	14%
West South Central	10%	5%	12%	10%	10%	12%	14%
East South Central	6%	2%	9%	6%	5%	4%	8%
Mountain	6%	6%	5%	8%	7%	6%	5%
West North Central	5%	5%	6%	6%	5%	5%	7%
New England	3%	8%	3%	4%	4%	4%	3%
Total	101%	98%	100%	100%	99%	100%	101%

2023 Sports Total Participation by Geographic Region (% of Participants)							
Geographic Region	Touch Football	Pickleball	Rugby	Badminton	Track and Field	Wrestling	Soccer (Indoor)
South Atlantic	22%	21%	20%	20%	19%	20%	19%
Pacific	14%	16%	23%	18%	15%	14%	17%
Middle Atlantic	19%	15%	19%	17%	13%	14%	17%
East North Central	13%	16%	12%	14%	16%	17%	17%
West South Central	11%	10%	11%	9%	13%	11%	9%
East South Central	6%	5%	2%	6%	5%	7%	4%
Mountain	5%	7%	7%	6%	7%	7%	6%
West North Central	5%	7%	3%	5%	9%	6%	6%
New England	3%	4%	2%	5%	4%	2%	5%
Total	98%	101%	99%	100%	101%	98%	100%

2023 Sports Total Participation by Geographic Region (% of Participants)							
Geographic Region	Basketball	Baseball	Slow Pitch Softball	Volleyball	Ultimate Frisbee	Ice Skating	Ice Hockey
South Atlantic	20%	19%	19%	17%	20%	18%	14%
Pacific	16%	16%	13%	14%	18%	15%	16%
Middle Atlantic	16%	17%	17%	12%	15%	19%	21%
East North Central	15%	16%	18%	20%	14%	16%	18%
West South Central	12%	11%	9%	13%	10%	8%	5%
East South Central	6%	6%	6%	5%	4%	4%	1%
Mountain	6%	6%	6%	8%	8%	6%	8%
West North Central	5%	6%	7%	10%	8%	7%	9%
New England	4%	4%	5%	2%	3%	5%	8%
Total	100%	101%	100%	101%	100%	98%	100%

Notes: Sports Business Research Network classifies Maryland into the South Atlantic Region.

Not all totals add to 100% due to rounding.

Data by region for fast pitch softball was unavailable.

Source: Sports Business Research Network.

Stakeholder Feedback

Crossroads held meetings with stakeholders including representatives from MSA, Baltimore County, Baltimore County Revenue Authority and Maryland Sports. Topics discussed during these meetings included current operational challenges related to existing facilities in the County, facility usage, and the feasibility of expanding Reisterstown Sportsplex for new programming including sports tourism activities. The following provides a high-level summary of the input received:

Current Operations and Governance Structure

- At Reisterstown Sportsplex, the outdoor fields are fully County-operated assets, while the indoor ice/turf building is operated by the Revenue Authority. The indoor turf fields are leased to the County for use between 8 am and 10 pm daily.
- Lease terms limit the ability to sublease or rent unused time, severely restricting programming and revenue opportunities.
- The ice rink is consistently at or near full capacity during peak hockey season due to strong demand from collegiate, youth, and adult users.
- The indoor turf, by contrast, faces significant underutilization during non-soccer season, with limited ability to be rented to outside groups because of lease restrictions.
- Current athletic facilities in the County are not often used for sports tourism because existing agreements, Recreation Council priority rights, school system joint-use limitations, and long-standing scheduling practices restrict the County's ability to reserve large blocks of time, charge market-rate rental fees, or program fields independently for tournaments.
- Baltimore County's 44 volunteer-run Recreation Councils independently decide what programs are offered in each community, control registration and keep all participant revenue, and receive free priority access to County fields and gyms.
- MOUs with Recreation Councils were only recently established, formalizing a structure that had operated informally for decades.
- New per-participant fees for travel and adult programs mark the first step toward improved financial oversight.
- The Civic Rec platform improves visibility into real usage and inefficiencies, though full cultural change will take time.
- Maintenance of parks and fields is handled by the Office of Property Management ("OPM"), giving Recreation & Parks little direct control over maintenance responsiveness or field quality.



Stakeholder Feedback (cont'd)

Current Building Program Offerings

- Existing facilities in the County offer strong recreational capacity but limited tournament-scale infrastructure.
- Overlay field designs used elsewhere in the County reduce scheduling flexibility.
- There is a lack of indoor tournament space, and most existing outdoor fields lack the required number of fields and other required infrastructure.
- The County has very few synthetic turf fields, and demand far exceeds supply.

Reisterstown Sportsplex Site Characteristics

- There is land for potential expansion of the site.
- The topography around the site is generally flat, making it favorable for future field development.
- The property has Program Open Space encumbrances, which may limit certain types of restricted or fee-only use.
- Access and circulation improvements may be needed around the 795/140/Route 30 interchange, which can be congested.



Stakeholder Feedback (cont'd)

Market Characteristics

- The location on the far northwest edge of the County is a less densely populated area in comparison to the central portion of the County.
- Reisterstown Sportsplex benefits from good highway access via I-795.
- Hotel supply in Owings Mills, Towson, and Pikesville could support multi-day sports tourism activity.
- Carroll County's limited sports field supply creates an opportunity for Baltimore County to attract additional regional demand.
- Competing regional complexes, such as Maryland SoccerPlex, Spooky Nook, DE Turf, and others currently offer stronger operational flexibility and field supply.

Market Opportunities

- A consolidated sports complex could tap into the multi-billion-dollar travel sports industry, which remains highly resilient and consistently drives hotel stays, restaurant spending, and local economic impact.
- Rectangular field sports (soccer, lacrosse, rugby, field hockey) present especially strong opportunity due to high participation, flexible scheduling, and the ability to host large-volume multi-game events.
- A purpose-built sports tourism complex could draw teams currently traveling to Gettysburg, Harrisburg, Lancaster County, and other Pennsylvania destinations.
- The ice rink's existing demand base indicates the potential for significant growth in hockey tournaments, especially if a second sheet of ice were developed to support multi-rink event formats.
- Growth in emerging or high-demand activities, such as pickleball, adult soccer, and year-round youth training, provides additional opportunities for weekend events and shoulder-season programming.
- The County could position itself as a mid-Atlantic alternative to oversaturated existing tournament destinations.
- A well-structured sports tourism model would need to be implemented to generate significant incremental economic activity.



Potential Demand Generators

A key aspect of the market analysis is to assess potential market opportunities for the proposed new sports tourism facility. Crossroads obtained feedback from a limited number of potential user groups related to potential programming, building program requirements, destination attributes, etc. The goal of this outreach was to identify potential market opportunities for the proposed new sports tourism facility as well as required facility program elements and supporting infrastructure needs. The input obtained is not intended to be statistically valid, but rather reflective of a representative sample of potential user groups.

Approximately 120 individuals who organize local, regional, national and international sporting events were contacted through a combination of web-based surveys and telephone calls. Responses were received representing a variety of sports types such as baseball, softball, football, lacrosse, soccer, basketball, volleyball, wrestling, cheer/dance, gymnastics, ice hockey, etc. Some organizations host events in multiple sports and age groups such as the Amateur Athletic Union.

The following summarizes common themes expressed by all user groups.

- Proximity to a hotel, entertainment, restaurants and their participation base; geographic location; highway accessibility; and cost/value were all considered important market attributes in attracting their event. Proximity to a major airport was the least important attribute.
- When asked how likely they were to host an event at the proposed new sports facility, 82% answered “Extremely Likely” or “Likely”. Of those that answered “Unlikely” or “Extremely Unlikely,” Geographic location was the primary reason they were not interested in hosting an event at the proposed new sports facility. Those users expressed demand for a more central location with better access to/from other states. Other reasons included a preference for a warmer climate, lack of a participant base in the area, and a sufficient supply of existing facilities in nearby markets.
- Respondents were split roughly one-third each among indoor sports, outdoor sports, and organizations involved in both.
- Most (65%) of respondents indicated their attendees would travel 15 to 30 minutes from the proposed new facilities to hotels, dining, retail, and other entertainment options.



Potential Demand Generators (cont'd)

The following summarizes responses by the type of facility that respondents indicated they would utilize.

Potential Outdoor Field Complex Users

- Respondents currently host events throughout Maryland and the U.S., including facilities such as Maryland SoccerPlex, Ripken Experience Aberdeen, Grand Park Sports Campus, etc.
- Nearly 90% of respondents indicated they were “Extremely likely” or “Likely” to host an event at the proposed outdoor facilities if it met their ideal needs. Those that were unlikely stated they host events in warmer climates.
- While demand was indicated for diamond and rectangular field sports, a higher level of demand was expressed for rectangular fields for sports such as lacrosse, soccer, field hockey, etc.
- When asked the average number of fields required, sports organizers indicated an average of 7 rectangular fields and 6 diamond fields. The maximum number of fields for both types was 12.
- When asked what type of playing surface is required for their events, 31% stated either artificial turf or natural grass, 31% stated artificial turf, 19% stated a combination of artificial turf and natural grass, and 19% stated natural grass.
- Many respondents indicated that their event requires bathrooms, parking, concessions, lights, Wi-Fi, etc.
- Of potential outdoor field complex survey respondents, 68% indicated they would be interested in hosting tournaments. Other activities included camps/clinics, travel team events, and college events.
- Most respondents indicated their tournaments are regional (i.e., multi-state), followed by national.
- According to survey respondents, the average outdoor event is 3 days.
- Respondents indicated that they would be interested in hosting outdoor events at the proposed new facilities year-round, while the most popular months were March through May and September and October.



Potential Demand Generators (cont'd)

Potential Indoor Facility Users

- Respondents currently host events throughout Maryland and the U.S., including facilities such as Hagerstown Field House, Adventist HealthCare Fieldhouse, Capital Clubhouse, Virginia Beach Sports Center, etc.
- Nearly 85% of respondents indicated they were “Extremely likely” or “Likely” to host an event at an enhanced/new indoor facility if it met their ideal needs.
- Sports organizers expressing interest in potentially hosting an event(s) at the indoor component of the proposed complex required an average of 8 basketball courts, 2 turf fields, and 2 ice sheets.
- Users representing ice activities stated that there is significant demand for ice time in the area, and residents are traveling outside the County and State to play.
- Many respondents indicated that their event requires concessions, spectator seating, Wi-Fi, and multipurpose space.
- When asked what type of court surface is required, 33% stated either hardwood or sport court, 13% stated hardwood, and 7% require sport court.
- 81% of survey respondents indicated they would be interested in hosting tournaments. Other events included recreational league events and collegiate events.
- Most respondents indicated that their events are regional (i.e., multi-state), followed by State.
- According to the survey respondents, the average event length was 3.1 days.
- Respondents indicated that they would be interested in hosting events year-round, with the most popular months being December through April.



Market Findings



Key Success Factors

As sports tourism grows, competition for visitor spending is increasing, reflected in both industry data and the rise of sports tourism–focused organizations. Spending by athletes, coaches, and families complements other visitor segments such as business, convention, and leisure travelers. Research shows that competitive sports participation remains relatively more stable even during economic downturns, as families prioritize athletic activities.

Communities can build sports tourism by leveraging local strengths, including elite athletes, leagues, and collegiate programs. A targeted strategy can also help extend visitation beyond peak seasons. The graphic below summarizes key success factors identified through discussions with destination marketing organizations (DMOs) and sports commissions nationwide, as well as our experience with similar communities.

Key Success Factors



Key Success Factors (cont'd)

Stakeholder Political Support

Successful destinations have political support from a variety of public and private stakeholders that prioritize sports tourism as an economic generator. These include local and State governments, local leagues, collegiate athletic departments, DMOs, economic development agencies, hospitality industry professionals, facility management and event organizers. Input from other communities reiterated the necessity to have the support of local stakeholders. Without the understanding from each of these organizations regarding the value of competitive sporting events, it can be an uphill battle to effectively attract and service them. Typically, one organization spearheads the effort to educate local stakeholders on the value such as a DMO or sports commission. In addition to marketing and branding, this organization serves as a liaison within the community between sports organizations, facilities, visitor amenities and funding partners. Developing regular communication to these groups outlining the economic value of sporting events within the local area serves to elevate this visitor segment and helps to harness their on-going support.

Marketing and Branding

As investment in sports tourism grows, competition among destinations is increasing. Communities with a clear sports tourism brand stand out to event organizers, participants, and spectators, helping drive higher visitation.

A strong brand highlights unique local assets, such as historic sites, beaches, lakes, or theme parks, and reflects a reputation for well-managed events. Success relies on quality facilities, strong visitor amenities, and effective event support, including trained volunteers, security, traffic management, and promotion of local attractions and businesses.



MARKETING
STRATEGY

An image showing the words "MARKETING STRATEGY" written in a bold, hand-drawn font. Below the text is a thick black arrow pointing to the right. The entire graphic is set against a light gray background.

Key Success Factors (cont'd)

Quality Facilities

Because each sport has distinct facility needs, destinations are most successful when they focus on offering high-quality venues for a select few rather than trying to accommodate all. Physical assets alone do not ensure success. Rather, effective management and a clear mission are essential. Facilities designed to generate economic impact require different marketing, booking, and maintenance strategies than those serving local recreation.

To maximize tourism value, many facilities limit local play, reserving prime time for tournaments that draw out-of-town participants. Parks departments often handle local leagues, while special-purpose venues host games and tournaments to reduce wear and tear. Maintaining the right balance between local league use and tournaments is crucial: leagues provide steady revenue and volunteer support, but excessive league play can raise maintenance costs and limit availability for high-impact events.

Destination Attributes

As previously mentioned, successful destinations require supporting infrastructure elements such as hotels, restaurants, retail and entertainment/recreation establishments. Unlike convention/meeting attendees, competitive sporting event organizers are accustomed to driving up to 30 minutes to these amenities from the host facility(ies). These elements are important and can impact the overall marketability, resulting financial success and the economic impact of sports facilities. Hotel supply is generally an important factor in drawing tournaments/competitions that draw out-of-town attendees. Providing convenient access to shopping, dining and entertainment can create a vibrancy that differentiates one destination from the others.



Key Success Factors (cont'd)

Relationships with Event Organizers

Successful sports tourism destinations have sports marketing agencies and facilities managed by staff with a network of contacts in relevant sports industries. These include local, state, regional and national sports organizations that compete in or hold tournaments/competitions. Fostering these relationships by attending industry conferences, attending major tournaments in other cities and hosting familiarization tours to showcase a destination's facilities and visitor amenities is important to set a destination apart. Communities with strong relationships are often able to secure multi-year contracts for significant annual events or an agreement to host numerous competitions sponsored by one organization. Utilizing local stakeholder connections with state/regional/national event organizers can broaden these relationships. For instance, a local elite league that participates in a national annual tournament or a college athletic department may have connections to a NCAA showcase or tournament.

Event Incentives

Communities have traditionally attracted sports tourism events by paying bid fees but growing competition and higher costs have led many to instead create their own events or offset event expenses. Hosting tournaments allows destinations to leverage local elite teams, schedule events during slower seasons, and avoid competing host cities. However, doing so requires strong local organization, volunteers, and coordination with venue operators, hotels, and public agencies.

Sports marketing organizations increasingly offset event costs, such as facility rentals, lighting, security, or catering, to keep spending within the community. Measuring success should be a coordinated effort among agencies, using consistent metrics such as hotel room nights or agreed-upon economic impact models to determine the financial value of bid fees and incentives.



Key Success Factors (cont'd)

Ownership/Operating Model

The quality of ownership and management of a sports complex can have a direct impact on performance. Similar sports facilities are typically owned and operated under one of several models such as:

- Public model
- Private model
- Public/private model
- Public/nonprofit model

The following provides a brief description of each.

<i>Public Model</i>	<i>Private Model</i>
<p>The land and the facility are owned, maintained and operated by a public entity such as a city or county. In many instances, publicly owned facilities are operated as a division within a municipal department. Advantages of this method include shared human and financial resources among the jurisdiction's various facilities as well as economies of scale in terms of utilities, insurance, and maintenance expenses. This management approach is most common where the facility(s) are primarily operated as a residential amenity, much like a library or public park and, as such, a greater portion of attendance is typically locally based. River City Sportsplex is an example of a facility with this model.</p>	<p>In some cases, sports facilities are constructed, maintained and operated by private entities. Rates are typically charged at market value to create a profitable operating scenario. As such, facilities operating under this approach are operated as for-profit businesses with missions and operating objectives in place that limit low-cost activities such as developmental leagues. In some instances, these types of facilities focus on niche sports and cater to elite level athletes where the private owners/managers can leverage their reputation and professional network outside the community to develop and attract tournaments. Piney Orchard Ice Arena is an example of a facility with this model.</p>

Key Success Factors (cont'd)

Public/Private Model

In this approach, a public entity such as a city or county may own the land and/or the venue and lease operations and maintenance of the asset to a third-party private entity. Virginia Beach Sports Center is an example of a facility with this model. This model is often utilized when the venue is developed with objectives to generate economic activity, address residential needs, and achieve financial self-sustainability. While some facilities utilizing this model are operationally self-sufficient, others still require annual financial operating support by the public owner. Third-party management companies typically bring unique knowledge and expertise of the facility management industry to a venue. The professional management company is generally compensated with an annual base fee in addition to a performance or incentive fee. The performance or incentive fee can be capped and is usually tied to producing measurable and desired operating results such as increasing the number of events and/or attendance and/or improving the financial operations as compared to a baseline benchmark target. Because many management contracts include financial incentives, the professional management company is generally profit driven. As such, there is sometimes a conflict for the management team to balance hosting events that operate at a profit and positively impact the facility's financial performance and hosting events that do not necessarily contribute positive cash flow but meet broader programming and operating goals for the community.

Disadvantages associated with this operating model include potential loss of direct control of the asset, profit motive versus community benefit and fees paid to the facility management company. When using this approach, the public entity's priorities for the venue should be clearly articulated in the lease or management agreement along with a supporting mission statement, booking policy, rental rates and other operating policies.

Some facilities are publicly owned and managed by a local sports club. In this scenario, the local club typically negotiates a long-term usage agreement with the owner on an annual basis. One downside of this model is that the club typically has the first right to utilize the facility throughout the year which limits the number of other events and activities can be hosted.



Key Success Factors (cont'd)

Public/Nonprofit Model

Similar to the public/private structure, the land is generally owned by a public entity and the facility is leased to and operated by a nonprofit organization. Operating entities under this structure often represent local sports associations that offer leagues from the developmental level up to elite travel teams. These organizations can be operated by parents and other area stakeholders with connections to their respective sport's regional and national offices and can facilitate the development or attraction of tournaments. The nonprofit is usually governed by a Board of Directors that provides oversight and accountability. While the Board of Directors provides objectives for the facility to accomplish, the management team is charged with formulating the best course of action to achieve the goals and objectives of the organization. The nonprofit entity seeks to leverage its relationships to develop strategic partnerships, expand programming and revenue-generating opportunities and share operating responsibilities. From a funding perspective, nonprofit organizations have access to grants that the public sector does not which can be used towards programming, construction costs, operating costs and/or capital improvements.

The nonprofit structure appears to work well with facilities that want the ability to solicit donations and volunteer labor hours. Annual sponsorships and other forms of ongoing support can be collected from the private or public sector, sometimes through a foundation. In many cases, donations are tax deductible.

Nonprofit status can also provide legal and/or tax advantages relative to other options. Because most nonprofit entities are dependent on external funding from private or public sources such as government grants and direct donations, ongoing funding is one of the challenges of a nonprofit entity. Any changes to the funding of the organization can impact the ability to hire and retain staff as well as sustain facility operations. The ability to secure the required volunteer labor pool on a regular basis can also be a challenge. Nonprofits are typically more effective when they have a dedicated source of funding.

Maryland SoccerPlex is an example of a facility with this model. Irrespective of the management approach utilized, a well-defined mission statement and booking policy can help reduce the potential for perceived differences in the facility's role by various stakeholders.

Market Findings

Based on the market research and analysis conducted, the following summarizes strengths, challenges, opportunities and threats associated with the proposed new sports tourism facility.

<i>Strengths / Opportunities</i>	<i>Challenges / Weaknesses</i>
<ul style="list-style-type: none">• Demand from potential user groups representing various sports• Potential to attract State, regional and national tournaments• Adequate regional vehicular access• Adequate existing supply of dining, retail, and hotel amenities within 30 minutes of the site• Established base of local user groups in the County representing diverse sports• Opportunity to:<ul style="list-style-type: none">– Better support recreational and competitive sports teams and leagues– Grow existing programming at Reisterstown Sportsplex– Attract sports tourism activities to the County and generate incremental new economic impacts– Leverage existing facilities and infrastructure on the proposed site.• Growing demand for youth and amateur sports tourism nationwide• Youth sports have historically fared well during economic downturns	<ul style="list-style-type: none">• Current operating structure of existing sports facilities limits the ability to host sports tourism events• Existing facilities in the County lack the required building program to host large tournaments• Competition from established sports tourism facilities in the State and region• Significant supply of planned sports tourism facilities in the State and region, especially indoor court facilities• Reisterstown is not considered a centralized location in the County• Local ingress/egress to the site• Generally, similar sports facilities require an operating subsidy• Funding/financing for such a facility• Potential future oversaturation of similar indoor court and outdoor field facilities• Potential changes in general macroeconomic conditions

Market Findings (cont'd)

Reisterstown Regional Park possesses several market attributes that make it a strong candidate for strategic sports facility investment. Its direct access to I-795, proximity to hotel and dining options, and its geographic location position it to attract both local participants and regional tournament participants and spectators. The site's existing recreational footprint and availability of adjacent land offer an opportunity to develop a multi-sport campus of meaningful scale. While the location is feasible from a sports tourism perspective, several user groups noted that a more central location would provide greater accessibility for users and potentially enhance overall utilization.

Market research points to relatively strong demand for outdoor athletic facilities. There is demand for approximately eight additional rectangular fields to support soccer, lacrosse, and field hockey, as well as a minimum of six baseball/softball diamonds. Demand for rectangular fields is considered stronger, as Maryland is widely recognized as a major hub for youth field sports, with strong participation across soccer, lacrosse, and field hockey supported by a large and active tournament ecosystem.

The region includes several established complexes such as the Maryland SoccerPlex, DE Turf, and others that already host a significant share of sports tourism events and present meaningful competitive pressure for any new development. These venues have strong brand recognition, dedicated operating structures, and long-standing relationships with tournament organizers. However, their presence also underscores the overall depth of the market and demonstrates that the Mid-Atlantic can sustain a high volume of field-sport activity. Based on market research including input from user groups, there is demand for additional facilities, with several users indicating limited date availability at existing facilities. A new complex at Reisterstown Regional Park should not attempt to replicate the scale of the State's largest multi-field destinations; rather, it should focus on expanding the County's capacity to host mid-size tournaments and specialty events.

Key Takeaways

- Overall, user groups generally view Reisterstown Regional Park as a viable location for a sports tourism facility, yet many indicated that a more centrally positioned site would better meet their needs.
- There is strong demand for outdoor sports facilities including rectangular and diamond fields, with stronger demand for rectangular fields for lacrosse, soccer, etc.
- There is an existing supply of competitive outdoor facilities in the region, including those in the State such as Maryland SoccerPlex. There are also several planned outdoor facilities in the region and State that if built, would present increased competition.
- Given the competitive supply, any new development should differentiate its building program and focus on capturing unmet demand including moderately-sized regional tournaments in multiple sports such as softball, baseball, lacrosse, soccer, etc.

Market Findings (cont'd)

Indoor facility needs are also significant, particularly demand for a second sheet of ice. Based on feedback and data obtained throughout the study process, the existing NHL rink operates at or near capacity during the prime season. Local organizations reported limited available ice time, with many participants traveling outside the area to find ice. With the upcoming closure of Patterson Park, it is likely that local demand for alternate facilities will increase even further. As it relates to sports tourism, several users expressed interest in hosting their events at the Sportsplex if it had a second sheet of ice. These users stated that they currently must host their tournaments in other counties or states at facilities that have multiple ice sheets. A second sheet of ice at the Sportsplex would capture unmet demand, allowing for multi-rink tournaments, expanded programming, and more efficient scheduling.

From a local-use perspective, there is high demand for indoor court space as there is a lack of indoor courts and competition space in the County. From a sports-tourism perspective, while demand was expressed by user groups, this segment faces growing competition, including existing regional facilities and planned State facilities in Prince George's County, Town of Ocean City/Berlin, St. Mary's County, and others that are in various stages of developing similar sports-tourism focused indoor facilities. While users representing basketball, volleyball, cheer, dance, wrestling, gymnastics, etc. expressed demand for a facility with a minimum of 8 basketball courts which could be used as 16 volleyball courts, it is recommended that the County take a cautious approach to development of a new indoor court facility focused sports tourism. The County should closely monitor the development of these facilities before committing to a major investment, ensuring that market conditions, competition levels, and long-term demand clearly support such an undertaking.

Development of any enhanced and/or new sports-tourism facilities in the County will require a revised operating structure. The current governance model, characterized by restrictive lease terms, Recreation Council priority access, and decentralized scheduling, does not support the flexible programming, block booking, or revenue management required for a competitive sports tourism complex. Implementing a modernized operating framework, whether through a new authority, public-private partnership, or alternative governance structure, will be essential to realizing the full benefits of new investment.

Key Takeaways (cont'd)

- **There is strong demand for a second sheet of ice to support tournaments, expanded programming, and scheduling efficiency. A second sheet of ice would better support local-use and allow for sports-tourism activities that generate economic impact.**
- **There is demand for indoor court space, especially from a local-use perspective. Developing two to four courts at the Sportsplex could help address these needs, though a more centrally located site in the County may offer better accessibility and be more ideally suited for this type of facility.**
- **While there is demand, a sports-tourism-focused court facility would face increasing competition from existing regional facilities as well as major planned developments in Prince George's County, Town of Ocean City/Berlin, St. Mary's County, and elsewhere in the State, if built. Given the breadth and location of these facilities, it is recommended that the County take a cautious approach to development of a sports-tourism-focused indoor court facility.**
- **Any new sports-tourism facilities will require a different operating structure, as the current governance model doesn't support the scheduling flexibility, pricing authority, or block-booking needed for competitive sports tourism.**

Market Supportable Building Program Recommendations

Given the market challenges, it will be important that any new facility try to differentiate itself from competitors with its building program, design elements, supporting amenities and infrastructure as well as service levels. It will also be important for the facility to be managed by a well-established team of professionals who specialize in marketing and management of similar facilities and who have established contacts and strong relationships with regional/national sporting event promoters and producers.

With consideration to the objectives of the proposed new sports facility which include generating sports-tourism, this page outlines specific program elements, patron amenities and other related supporting infrastructure that the County should consider based on the market research conducted as part of this study effort.

As it relates to the recommended outdoor fields, the program reflects what is market-supportable from a sports-tourism perspective. The manner in which the County decides to pursue this, whether through entirely new construction or expansion of existing fields should be further evaluated to determine feasibility. The recommendations outlined in this report focus solely on the market need, rather than the specific development approach.

As it relates to the recommended indoor courts, there is currently demand for the indoor building program elements shown from a sports tourism perspective. However, as previously mentioned, there are several ongoing projects in the State that are further along in planning that will influence long-term market dynamics, if built. As such, it is recommended that the County take a cautious approach and continuously monitor these planned developments before proceeding with a major indoor court investment. A smaller scale facility with two (2) to four (4) courts and the ability for future expansion could be considered in the short term to better meet local demand. Should the County decide to pursue a facility of this type, further evaluation would be needed to determine if Reisterstown Regional Park is the most viable site location.

Outdoor Program Elements

- 8 to 10 tournament quality rectangular fields
- 6 to 8 diamond fields
- Fields should be turf and lighted to extend usage time
- Bleacher seating
- Robust Wi-Fi service that can support streaming
- Other support spaces including concessions, restrooms, ample parking, storage, offices, playground, etc.

Indoor Program Elements - Ice

- Second sheet of ice to support additional local programming and tournament play
- Locker rooms, storage space, and other supporting infrastructure

Indoor Program Elements – Courts

- 8 to 10 basketball courts which can be used as 16 to 20 volleyball courts
- Concessions, spectator seating, lobby
- Scoreboards and timing systems on each court
- Backboards, net systems, support equipment, etc.
- Robust Wi-Fi service that can support streaming
- Other support spaces including storage, ample parking, restrooms, etc.

Economic Impact Analysis



Overview

One of the primary reasons that similar sports facilities are developed is the economic activity that they can generate. Based on the market analysis conducted for this study as well as the proposed site location, this section estimates the net new economic and fiscal benefits associated with the proposed new sports tourism facility at Reisterstown Regional Park.

The purpose of this analysis is to provide a high-level estimate of the potential economic and fiscal impacts that could be generated by the proposed recommendations. As previously mentioned, it is recommended that a cautious approach is taken related to the development of an indoor sports-tourism court facility, given the potential planned increase in supply of indoor sports-tourism facilities in the State and region. It should be noted that the estimates shown in this section for the indoor court facility do not account for the development of the planned indoor sports tourism facilities throughout the State, which are in varying stages of the planning process. Should these facilities be built, it would materially impact demand and associated economic impacts related to this project. As it relates to the other proposed components, this analysis assumes no other facilities are developed outside those mentioned in this report.

Annual economic impacts start with the initial direct spending on facility operations as well as spending by attendees outside of the proposed new sports-tourism facility. 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 total output, employment (jobs) and labor income. This analysis also estimates the tax revenues generated from ongoing operations of the proposed new sports tourism facility.

The amount and type of activity, origin of attendees, per capita spending estimates, distribution of spending, specific economy under consideration, multipliers and specific taxes quantified are variables that influence the economic and fiscal impact estimates.



Economic Impact Analysis – Methodology

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 generated from the proposed new sports tourism facility is a key input in the economic impact model. Direct spending represents the initial change in spending that occurs as a direct result of operations. An attendee eating at a local restaurant before an event is an example of direct spending.

An assessment of the economic impacts can be approached in several ways. This analysis utilizes estimated expenditures related to facility operations such as salaries/wages, utilities, repairs & maintenance, general administrative costs, etc. as well as attendee spending outside of the proposed new facilities before and after events at hotels, restaurants, bars, gas stations, retail stores, etc. as an initial measure of economic activity in the County and State.

Attendee spending outside the proposed new sports facility is generated from 1) local attendees who reside in the County and Maryland 2) day trippers who likely originated from outside the area who travel to and from the proposed new sports facilities for events and 3) attendees who originated outside the area and stayed overnight. Each group was assigned different per capita spending amounts based on data provided by the client and industry research from sources such as the Maryland Office of Tourism, Tourism Economics and other secondary research. Spending by local attendees was excluded to calculate net new spending.

Not all direct spending directly impacts the County and State economies. To estimate the net new economic impact, adjustments were made to gross direct spending to account for displacement (i.e., spending that would have occurred elsewhere in the County and the State without the presence of the proposed new sports tourism facility and leakage (i.e., spending that occurs outside the County and State economies). Further, this analysis accounts for retail margins (i.e., the difference between retail purchaser price and the producer price) and the percentage of goods purchased within the County and State economies.

In reality, while it is likely that a portion of attendee spending would be displaced or would have occurred somewhere in the local and State economies if the event had not been held, it is also reasonable to assume that attendees may not make the same level of purchases in the economy if the event had not occurred and may even spend money attending sports activities outside the local and State economies. As such, the estimate associated with attendee spending outside the proposed new sports tourism facility reflects a conservative approach.

The estimated net new direct spending amounts were then allocated to specific industry codes such as lodging, food & beverage, entertainment/recreation, transportation and retail.

Economic Impact Analysis – Methodology (cont'd)

Multiplier Effect

Additional economic impacts are produced through the re-spending of direct spending. 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 IMPLAN Group, LLC. 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. Currently, there are hundreds of licensed IMPLAN users in the U.S. including universities, government entities and private companies.

The economic data for IMPLAN comes from the system of national accounts for the U.S. based on data collected by the U.S. Department of Commerce, the U.S. Bureau of Labor Statistics, and other federal and state government agencies. Data is collected for over 500 distinct producing industry sectors of the national economy corresponding to the Standard Industrial Classifications ("SICs"). IMPLAN's 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 can provide indirect and induced effects, employment and earnings information by specific industry category while considering the leakages associated with the purchase of certain goods and services outside the economy under consideration.

Once the estimated direct spending amounts are assigned to an appropriate industry category, the IMPLAN model estimates the economic multiplier effects for each type of direct spending attracted to or retained in the County and State economies resulting from the proposed new sports tourism facility. The total output multiplier is used to estimate the aggregate total spending that occurs beginning with direct spending and continuing through successive rounds of re-spending which are generally referred to as indirect and induced effects on the area economy.

Indirect and Induced Impacts

Indirect impacts reflect the re-spending of the initial or direct expenditures, or the business-to-business transactions required to satisfy the direct effect (e.g., impacts from non-wage expenditures). For example, an attendee's direct expenditure at a restaurant requires the restaurant owner to purchase food and items from suppliers. The portion of these restaurant purchases that are spent within the area economy are indirect impacts.

Induced impacts reflect changes in local spending by households on goods and services that result from income changes in the directly and indirectly affected industry sectors (e.g., impacts from wage expenditures). For instance, a server at a restaurant could have more personal income due to an attendee's visit to the restaurant. The amount of increased income that the employee spends in the area economy is an induced impact.

The model generates estimates of these impacts through a series of relationships using average wages, prices and transportation data, considering commute patterns and the relative interdependence of the economy on outside regions for goods and services.

As described above, Indirect and induced impacts are commonly referred to as multiplier effects.

Economic Impact Analysis – Methodology (cont'd)

Total Economic Impact

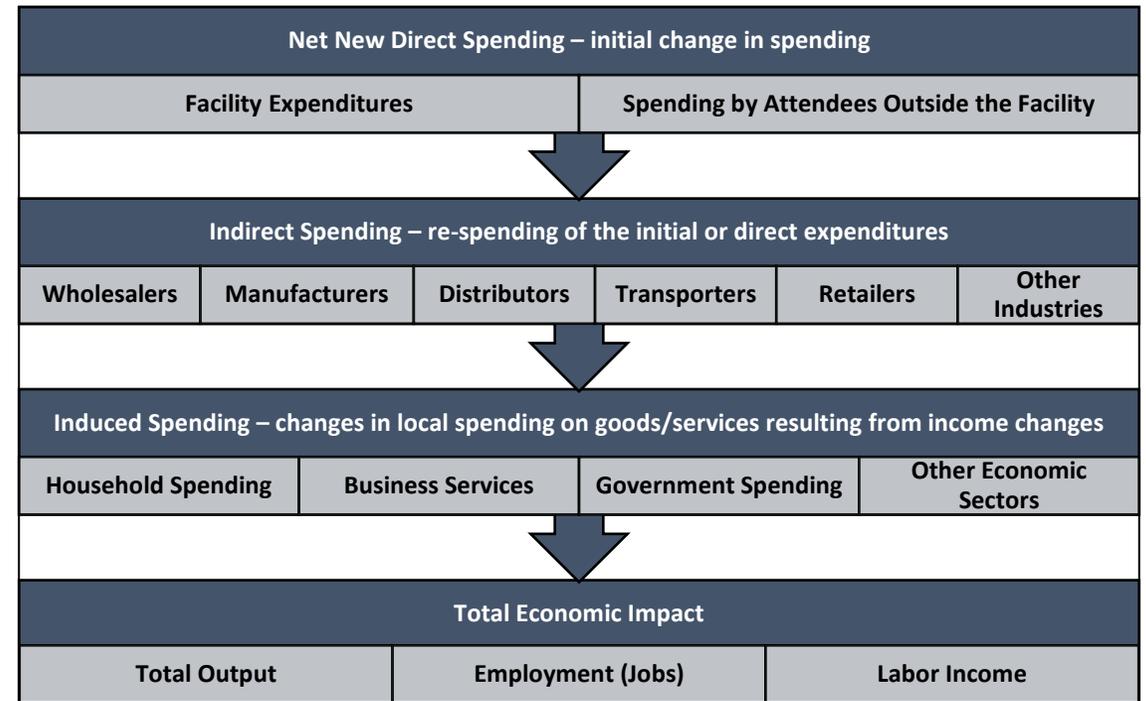
The calculated multiplier effect is added to the direct impact to quantify the total economic impact in terms of output, employment and labor income which are defined as follows:

Total Output is a measure of the total estimated value of the production of goods and services supported by operations and construction of the proposed new sports tourism facility. Total output is the sum of all intermediate sales (business to business) and final demand (sales to consumers and exports). This calculation measures the total dollar change in spending (output) that occurs in the economy for each dollar of output delivered to final demand.

Employment (Jobs) represents the number of full-time and part-time jobs that are supported by operations of the proposed new sports tourism facility. The employment multiplier measures the total change in the number of jobs supported in the economy for each additional \$1.0 million of output delivered to final demand. It should be noted that a person can hold more than one job, so the total number of jobs is not necessarily the same as the number of employed people. Further, the total number of jobs does not only reflect employees working at the proposed new sports tourism facility but rather the total number of jobs that are directly and indirectly supported on an annual basis in multiple sectors of the economy due to the ongoing operations.

Labor Income represents the wages and salaries earned by employees of businesses associated with or impacted by operations of the proposed new sports tourism facility. 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 graphic below illustrates the multiplier effects for calculating total economic impact.



Fiscal Impact Analysis – Methodology

Tax Revenues

The estimated spending generated from the proposed new sports tourism facility also produces tax revenues for the local and State economies. Experience in other markets suggests that while a significant portion of the direct spending will likely occur near the proposed facility, additional spending occurs in other surrounding economies. The following provides a description of the taxes estimated in this analysis.

Local Taxes

Hotel/Motel Tax – Baltimore County imposes a tax on accommodations at a rate of 9.5% which was applied to the estimated direct hotel spending at the local level.

Admissions and Amusement Tax – The Baltimore County Admissions and Amusement Tax is a local tax applied to the gross receipts from activities such as admissions to entertainment and sporting events, the use or rental of recreational facilities or equipment, and the sale of merchandise, refreshments, or services associated with amusement activities. The current tax rate in Baltimore County is 10% of gross receipts for taxable activities. When these receipts are also subject to the Maryland Sales and Use Tax, the combined total of both taxes cannot exceed 11%. Certain exemptions apply, including charges for club memberships that provide unlimited facility use, instructional classes that are part of an ongoing program, and specific charitable or nonprofit events. The tax is administered and collected by the Comptroller of Maryland on behalf of the county, which sets the rate within state-established limits.

Local Personal Income Tax – Baltimore County imposes a personal income tax of 3.20% which is calculated as a percentage of taxable income. For the purposes of this analysis based on public information obtained online from the Comptroller of Maryland's office, an effective tax rate was calculated. Because local income tax is based on where a person lives, not where they work, only a portion of personal income taxes generated from the operations of the proposed new facility occurs in the County.



Fiscal Impact Analysis – Methodology (cont'd)

State of Maryland Taxes

In general terms, all State tax proceeds are collected in the State's General Fund and then allocated to a variety of program areas, such as education, transportation and public safety, among others. As such, individual revenue sources such as the 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 the 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 State-level taxes quantified in this analysis.

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 the purposes of this analysis and based on information obtained online from the Comptroller of Maryland, an effective tax rate was calculated and applied to a portion of the estimated total output at the State level.

Personal Income Tax – The State of Maryland imposes a personal income tax assessed against personal income earned in the State. The 2025 State income tax is a graduated rate ranging from 2.0% to 6.50% of taxable income. Nonresidents are subject to a special nonresident tax rate of 2.25% in addition to the State income tax rate. For the purposes of this analysis and based on information obtained online from the Comptroller of Maryland's office, an effective tax rate was calculated and applied to a portion of estimated labor income at the State level.

Sales and Use Tax – The State of Maryland collects 6% sales and use tax from sales and leases of tangible personal property and services throughout the State and a 9% tax on alcoholic beverages. For the purposes of this analysis, the 6% tax rate is applied to estimated taxable spending at the State level which represents a conservative estimate relative to the sale of alcoholic beverages.

While other taxes such as motor vehicle rental tax may be positively impacted by operations of the proposed new facilities, they are not quantified in this analysis.

General Assumptions

This analysis is based on certain hypothetical assumptions pertaining to the building program, ownership/operating structure, usage levels and other related operating strategies which are outlined below. It should be noted that these assumptions are preliminary and should continue to be refined as decisions related to the building program, site location and other operating characteristics evolve.

General Assumptions

- The recommended building program is developed at Reisterstown Regional Park.
- The facilities will be designed and constructed to attract high-quality tournaments/competitions.
- The proposed facilities will be operated in a manner that does not restrict programming and revenue generation. It is assumed that the operator will have full control of facility booking to maximize programming aligned with the objective of the facilities, which is to increase sports tourism and associated economic impacts.
- The facilities will be marketed by both facility management and established tourism agencies such as Maryland Sports.
- The facilities will be available for local play but events that generate room nights and economic impact will be prioritized.
- The facilities will be operated in a manner that provides a consistent, high-level of customer service.
- There will be appropriate lead time for event booking and sales prior to opening.
- Area hotels will actively support sports tourism initiatives.
- No major economic fluctuations, acts of nature, or cataclysmic events such as an epidemic occur that could adversely impact the dynamics of the project.
- Amounts are shown in 2025 dollars.

Proposed Outdoor Fields

- No similar outdoor sports-tourism facilities are built in the State or region, outside of those profiled in this report.
- The proposed outdoor fields will be operated by an established management team that specializes in marketing and management of similar sports facilities and has established contacts and strong relationships with sporting event promoters and producers.

Proposed Ice Facility

- No similar ice sports-tourism facilities are built in the State or region, outside of those profiled in this report.
- The indoor ice facility will continue to be operated by the Revenue Authority.

Proposed Indoor Courts

- For purposes of this analysis, it is assumed that the planned indoor court facilities in the State are not built. If built, these projects could adversely impact the market and economic feasibility of a new indoor court facility at Reisterstown Regional Park from a sports-tourism perspective.
- The proposed indoor court facility will be operated by an established management team that specializes in marketing and management of similar sports facilities and has established contacts and strong relationships with sporting event promoters and producers.

Estimated Usage

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 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 hosting an event at the proposed new sports facility. The length of time for new venues to reach stabilized operations varies but typically occurs in or around year three.

Overall utilization at any facility is typically dependent on several factors such as market attributes; size, configuration and quality of the facilities offered; effectiveness of the management team and its partners in booking the facility; date availability; cost; etc. and is rarely consistent. For instance, the potential new outdoor sports complex may attract more baseball tournaments one year and more softball tournaments in another year.

Given the primary objective of new facilities is to generate sports tourism, this analysis estimates the number of tournaments/competitions that could be hosted at each of the recommended building program components. Tournaments include multi-day youth and adult competitions in a variety of sports. These events can be created internally by facility management or by sports organizers and include teams from throughout the State, the surrounding region, the U.S. and/or internationally. While not quantified in this analysis, each facility could also support leagues, camps, clinics, and community programming such as Learn to Skate and Public Skate; however, these activities are expected to be predominantly local in nature and are not considered significant drivers of sports-tourism demand.



Estimated Usage (cont'd)

The adjacent tables summarize the estimated usage of the proposed outdoor fields, a second ice sheet, and indoor court facility. For purposes of this analysis, year three reflects a stabilized year of operations.

The proposed new outdoor field complex is estimated to host 32 tournaments that could generate 306,288 total attendee days (defined as total attendance multiplied by event length) in a stabilized year. This activity is estimated to generate 47,250 net new room nights annually in the County and 41,550 net new room nights annually in the State.

The proposed enhanced ice facility is estimated to host 14 tournaments that could attract 103,680 total attendee days in a stabilized year. This activity is estimated to generate 18,460 net new room nights annually in the County and 16,070 net new room nights annually in the State.

The proposed new indoor court facility is estimated to host 30 tournaments that could attract 239,328 total attendee days in a stabilized year. This activity is estimated to generate 44,570 net new room nights annually in the County and 38,700 net new room nights annually in the State.



Estimate of Annual Usage & Room Nights - Proposed New Outdoor Field Complex					
Category	Year 1	Year 2	Year 3	Year 4	Year 5
Tournament Activity					
Small Tournaments	5	5	8	8	8
Medium/Large Tournaments	14	18	24	24	24
Total	19	23	32	32	32
Total Number of Participants and Spectators	86,184	102,744	143,424	143,424	143,424
Total Participant and Spectator Attendee Days	182,088	215,208	306,288	306,288	306,288
Net New Room Nights (County)	27,710	33,070	47,250	47,250	47,250
Net New Room Nights (State)	24,800	28,860	41,550	41,550	41,550

Estimate of Annual Usage & Room Nights - Proposed Enhanced Indoor Ice Facility					
Category	Year 1	Year 2	Year 3	Year 4	Year 5
Tournament Activity					
Small Tournaments	4	5	7	7	7
Medium/Large Tournaments	3	4	7	7	7
Total	7	9	14	14	14
Total Number of Participants and Spectators	22,032	27,216	45,360	45,360	45,360
Total Participant and Spectator Attendee Days	50,544	60,912	103,680	103,680	103,680
Net New Room Nights (County)	8,710	9,750	18,460	18,460	18,460
Net New Room Nights (State)	7,630	8,430	16,070	16,070	16,070

Estimate of Annual Usage & Room Nights - Proposed New Indoor Court Facility					
Category	Year 1	Year 2	Year 3	Year 4	Year 5
Tournament Activity					
Small Tournaments	6	6	10	10	10
Medium/Large Tournaments	11	16	20	20	20
Total	17	22	30	30	30
Total Number of Participants and Spectators	59,472	77,040	107,424	107,424	107,424
Total Participant and Spectator Attendee Days	131,184	166,320	239,328	239,328	239,328
Net New Room Nights (County)	23,680	29,210	44,570	44,570	44,570
Net New Room Nights (State)	20,840	25,190	38,700	38,700	38,700

Economic Impact Analysis

Based on the market analysis conducted for this study including the estimate of utilization and related assumptions previously shown, this section estimates the net new economic and fiscal benefits associated with operations of the proposed new sports tourism facility.

If built, the local and State economies could benefit from ongoing operations of the proposed new sports tourism facility, including the following tangible and intangible benefits.

- Generating additional economic activity in terms of spending in the area economies as well as associated jobs and labor income
- Growing and retaining commerce in the area
- Offering first-class indoor and outdoor sports facilities for County residents and visitors
- Improving the overall quality of life and livability of the area
- Attracting visitors to help support area businesses
- Leveraging public investment to serve as a catalyst for other potential development initiatives

Each of these benefits are important in assessing the overall benefit that the proposed new sports tourism facility may have on the area and the State. While the value of many of these benefits is difficult to measure, the economic activity generated can be quantified.



Estimate of Economic Impacts

The adjacent tables show the estimated order-of-magnitude economic impacts of the various building program components in a stabilized year of operations (year three).

As shown, net new direct spending associated with operations of the proposed new outdoor sports complex is estimated to be \$22.1 million and total output is estimated to be \$32.1 million in a stabilized year at the County level. This spending is estimated to support 240 jobs and \$11.8 million in labor income. Net new direct spending associated with operations of the proposed new outdoor sports complex is estimated to be \$15.2 million and total output is estimated to be \$25.5 million at the State level. This spending is estimated to support 180 jobs and \$9.1 million in labor income.

Net new direct spending associated with operations of the proposed enhanced ice facility is estimated to be \$8.9 million and total output is estimated to be \$12.8 million in a stabilized year at the County level. This spending is estimated to support 90 total jobs and \$4.6 million in labor income. Net new direct spending associated with operations of the proposed enhanced ice facility is estimated to be \$7.1 million and total output is estimated to be approximately \$12.0 million at the State level. This spending is estimated to support 80 jobs and \$4.1 million in labor income.

Net new direct spending associated with operations of the proposed indoor court facility is estimated to be \$19.9 million and total output is estimated to be \$28.7 million in a stabilized year at the County level. This spending is estimated to support 210 jobs and \$10.5 million in labor income. Net new direct spending associated with operations of the proposed new indoor court facility is estimated to be \$14.2 million and total output is estimated to be \$23.6 million at the State level. This spending is estimated to support 160 jobs and \$8.4 million in labor income. As previously stated, this analysis assumes the current planned indoor sports-tourism facilities in the State are not constructed to provide an order-of-magnitude estimate of the potential economic impacts that could be generated. If these facilities are built, it would significantly impact the amount of net new economic impacts that could be generated.

Proposed Outdoor Field Complex		
Estimate of Annual Net New Economic Impacts from Ongoing Operations (Stabilized Year)		
Category	Baltimore County	State of Maryland
Output		
Direct Spending	\$22,070,000	\$15,240,000
Indirect & Induced Spending	\$10,000,000	\$10,220,000
Total Output	\$32,070,000	\$25,460,000
Total Jobs (Full- and Part-Time)	240	180
Total Labor Income	\$11,840,000	\$9,130,000

Proposed Enhanced Indoor Ice Facility		
Estimate of Annual Net New Economic Impacts from Ongoing Operations (Stabilized Year)		
Category	Baltimore County	State of Maryland
Output		
Direct Spending	\$8,870,000	\$7,140,000
Indirect & Induced Spending	\$3,970,000	\$4,830,000
Total Output	\$12,840,000	\$11,970,000
Total Jobs (Full- and Part-Time)	90	80
Total Labor Income	\$4,630,000	\$4,120,000

Proposed Indoor Court Facility		
Estimate of Annual Net New Economic Impacts from Ongoing Operations (Stabilized Year)		
Category	Baltimore County	State of Maryland
Output		
Direct Spending	\$19,850,000	\$14,150,000
Indirect & Induced Spending	\$8,860,000	\$9,470,000
Total Output	\$28,710,000	\$23,620,000
Total Jobs (Full- and Part-Time)	210	160
Total Labor Income	\$10,510,000	\$8,370,000

Notes: Local and State amounts are not additive.

Estimate of Tax Revenues Generated from Facility Operations

The adjacent tables summarize estimated tax revenues that could be generated from the various building program components in a stabilized year of operations.

As shown, annual net new tax revenues generated from ongoing operations of the proposed outdoor field complex are estimated to be \$915,000 at the County level and \$1.5 million at the State level.

Annual net new tax revenues generated from ongoing operations of the indoor ice facility are estimated to be \$405,000 at the County level and \$666,000 at the State level.

Annual net new tax revenues generated from ongoing operations of the indoor court facility are estimated to be \$847,000 at the County level and \$1.4 million at the State level.

Although not quantified in this analysis, construction costs associated with development of a new sports tourism facility would provide additional economic and fiscal impacts to the local area and the State during the construction period. These benefits would include the creation of jobs which produce earnings for area residents as well as increased tax revenues from the purchase of materials and supplies.

Proposed Outdoor Field Complex Estimate of Annual Net New Tax Revenues from Ongoing Operations (Stabilized Year)	
Baltimore County	
Admissions & Amusement Tax	\$342,000
Hotel/Motel Tax	\$476,000
Local Personal Income Tax	\$97,000
Total	\$915,000
State of Maryland	
Sales and Use Tax	\$1,028,000
Personal Income Tax	\$349,000
Corporate Income Tax	\$88,000
Motor Vehicle Rental Tax	\$21,000
Total	\$1,486,000
Grand Total	\$2,401,000

Proposed Enhanced Indoor Ice Facility Estimate of Annual Net New Tax Revenues from Ongoing Operations (Stabilized Year)	
Baltimore County	
Admissions & Amusement Tax	\$181,000
Hotel/Motel Tax	\$186,000
Local Personal Income Tax	\$38,000
Total	\$405,000
State of Maryland	
Sales and Use Tax	\$457,000
Personal Income Tax	\$157,000
Corporate Income Tax	\$41,000
Motor Vehicle Rental Tax	\$11,000
Total	\$666,000
Grand Total	\$1,071,000

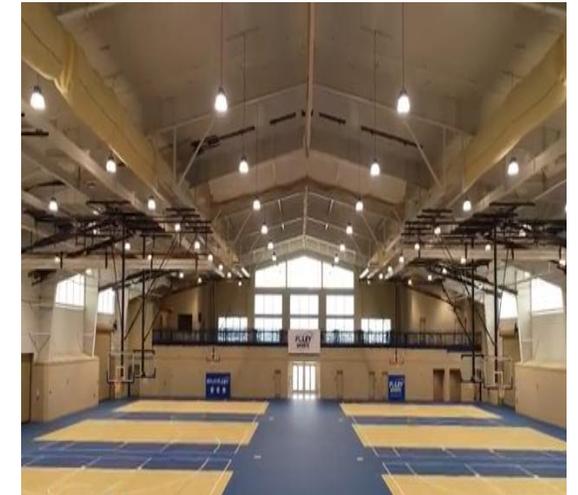
Proposed Indoor Court Facility Estimate of Annual Net New Tax Revenues from Ongoing Operations (Stabilized Year)	
Baltimore County	
Admissions & Amusement Tax	\$311,000
Hotel/Motel Tax	\$449,000
Local Personal Income Tax	\$87,000
Total	\$847,000
State of Maryland	
Sales and Use Tax	\$943,000
Personal Income Tax	\$320,000
Corporate Income Tax	\$81,000
Motor Vehicle Rental Tax	\$18,000
Total	\$1,362,000
Grand Total	\$2,209,000



Potential Next Steps

Should the County decide to move forward with the development of the proposed new sports tourism facility, the following outlines potential next steps in the process.

- Continue to monitor the status of proposed sports-tourism facilities in the State and region.
- Determine if Reisterstown Regional Park is the optimal site location in the County for a new sports tourism facility.
- Prepare a detailed building program and development schedule that considers a phased approach to construction.
- Create a funding plan for project development costs, which may include both public and private sector partners.
- Determine an operating strategy for the sports tourism facility that includes exploring potential operating and programming partnerships with public and/or private entities with extensive experience in booking, marketing and servicing the target market.
- Develop a well-defined mission statement, booking policy, marketing plan and rental rate structure that is consistent with the County's long-term operating objectives for the facility.
- Preparing a sustainable financial plan that addresses both ongoing operational and long-term capital improvement needs for the sports tourism facility.



Limiting Conditions & Assumptions



Limiting Conditions & Assumptions

This report is subject to our contractual conditions as well as the following limiting conditions and assumptions.

- This analysis has been prepared for the Maryland Stadium Authority and Baltimore County (Client) for its internal decision-making purposes associated with the proposed new sports tourism facility and should not be used for any other purposes without the prior written consent of Crossroads Consulting Services, LLC.
- This report should only be used for its intended purpose by the entities to whom it is addressed. Reproduction or publication by other parties is strictly prohibited.
- The findings and assumptions contained in the report reflect analysis of primary and secondary sources. We have utilized sources that are deemed to be accurate but cannot guarantee their accuracy. No information provided to us by others was audited or verified and was assumed to be correct.
- Although the analysis includes findings and recommendations, all decisions relating to the implementation of such findings and recommendations shall be the Client's responsibility.
- Estimates and analysis regarding the proposed new sports tourism facility are based on trends and assumptions and, therefore, there will usually be differences between the projected and actual results because events and circumstances frequently do not occur as expected, and those differences may be material.
- Although this analysis utilizes various mathematical calculations, the final estimates are subjective and may be influenced by our experience and other factors not explicitly stated.
- We have no obligation, unless subsequently engaged, to update this report or revise this analysis as presented due to events or circumstances occurring after the date of this report.
- While the Maryland Stadium Authority is entitled to receive the work product prepared by Crossroads pursuant to this engagement, it has no right to access or deliverance of any underlying statistics, models, or any other information developed by Crossroads in preparing this report.
- The quality of ownership and management of the proposed new sports tourism facilities can have a direct impact on economic performance. This analysis assumes responsible and competent ownership and management. Any departure from this assumption may have a significant impact on the findings outlined in this report.
- Multiple external factors influence current and anticipated market conditions. Although we have not knowingly withheld any pertinent facts, we do not guarantee that we have knowledge of all factors which might influence the operating potential of the proposed sports facilities. Due to quick changes in the external factors, actual results may vary significantly from estimates presented in this report.
- The analysis performed was limited in nature and, as such, Crossroads Consulting Services, LLC does not express an opinion or any other form of assurance on the information presented in this report.
- The analysis is intended to be read and used in its entirety. Separation of any portion from the main body of the report is prohibited and negates the analysis.
- In accordance with the terms of our engagement letter, the accompanying report is restricted to internal use by the Client and may not be relied upon by any party for any purpose including any matter pertaining to financing.