

Nationwide Arena

Economic Impact Assessment



Authored by:  **VISTA SITE SELECTION**

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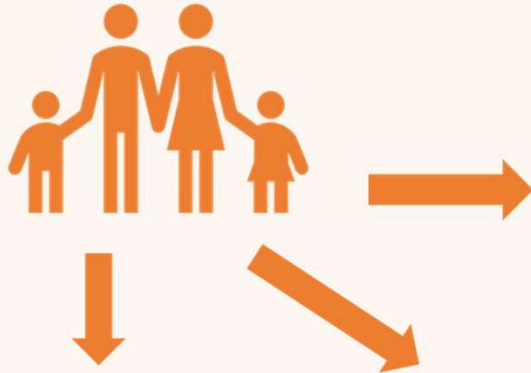
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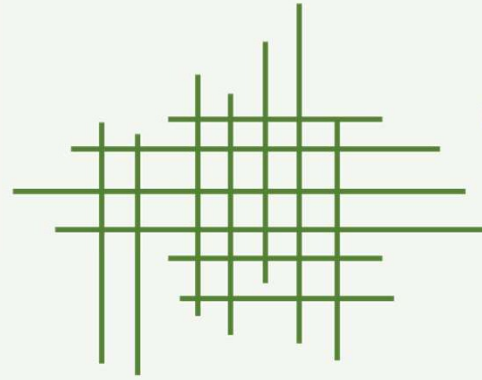
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District Spending
(Sales Tax)
Concert/Event Spending
(Sales Tax)
Hockey Spending
(Sales Tax)
Area Spending
(Sales Tax, Bed Tax)



Visitor Spending

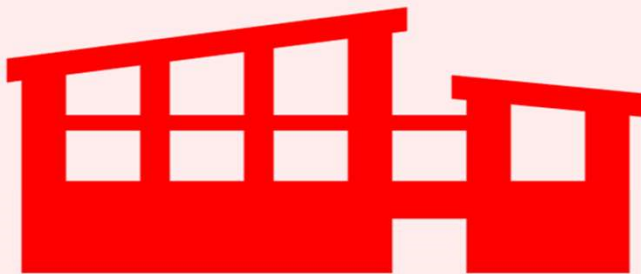


Residential Property & Resident Growth
(Property Tax, Resident Spending Sales Tax)
Office Property & Job Growth
(Property Tax Income Tax)
Commercial Property & Sales Growth
(Sales Tax, Income Tax)
Retail Property & Sales Growth
(Sales Tax)
Lodging & Sales Growth
(Bed Tax, Sales Tax)

Arena District Property Growth

Arena Economic Impacts

Spending
(Sales Taxes)
Capital Investment
(Property Taxes)
Job Growth
(Income Taxes)
Special Events
(Sales Taxes)



+Spinoff Effects
of the above.

Nationwide Arena Operations & Cap-Ex

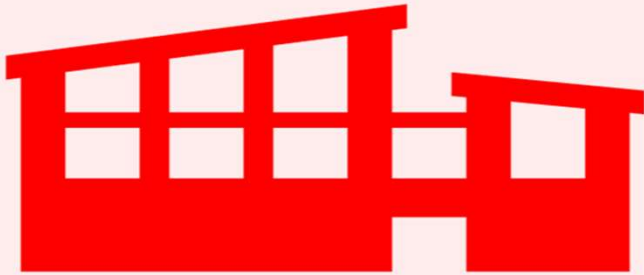


Job Growth
(Income Taxes)
Local Spending
(Sales Tax)
Event Revenue
(Sales Tax)

+Spinoff Effects
of the above.

Columbus Blue Jackets Operations

Nationwide Arena & Hockey Operations



Nationwide Arena Operations & Cap-Ex



Columbus Blue Jackets Operations

274 full-time Columbus Blue Jackets employees

37 full-time Nationwide Arena employees

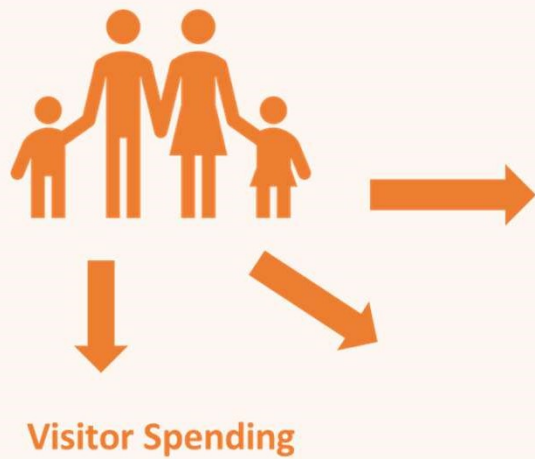
668 part-time Nationwide Arena employees

705 indirect & induced jobs created from arena and hockey operations

\$116 million in annual supplier and household spending

\$153 million in annual contribution to County GDP

Driving Visitors & Tourism



Annual Activity

949,246 event attendees

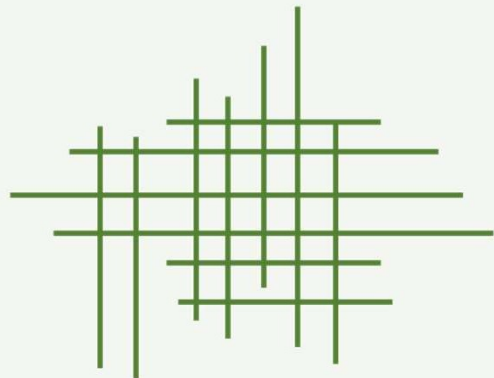
354,623 overnight guests

\$117 million tourist spending

\$79 million additional spinoff spending

+1,592 jobs created countywide

Catalyzing & Anchoring the Arena District



Arena District Property Growth

Since 2000 (Construction of Arena)

13,858 jobs added (514% increase)

8,243 county-wide supplier jobs caused

5,615 county-wide jobs caused District Spending

158% in housing units added

329% median household income gain

\$1.413 billion improved property value

472% market value increase of property

Comparative Economic Impacts – Tax Type

	Arena-only Growth Impacts	Arena District Growth Impacts
Economic Impacts		
Full-time & Part-time Jobs	2,754	33,763
Annual Economic Output	\$462 million	\$9.3 billion
*Projected Taxes over Next 30 Years (First-year annual in parenthesis)		
Property Taxes (and TIF)	\$42 million (\$1.2m)	\$1.4 billion (\$28.4m)
Income Taxes	\$418 million (\$9.8m)	\$6.2 billion (\$142m)
Sales Taxes	\$641 million (\$16.1m)	\$993 million (\$24.5m)
Lodging Taxes	\$286 million (\$6.4m)	\$396 million (\$9.2m)
Total	\$1.47 billion	\$8.69 billion

**Projections do not assume future development within the Arena District, only existing development*

Comparative Economic Impacts – Unit of Government

	Arena-only Growth Impacts	Arena District Growth Impacts
Economic Impacts		
Full-time & Part-time Jobs	2,754	33,763
Annual Economic Output	\$462 million	\$9.3 billion
*Projected Taxes over Next 30 Years (First-year annual in parenthesis)		
Columbus (including TIF)	\$248 million (\$5.8m)	\$2.5 billion (\$59.3m)
Additional to all County Cities	\$105 million (\$1.9m)	\$1.1 billion (\$24.5m)
School Districts	\$31 million (\$1.1)	\$480 million (\$13.7m)
Transit Authority	\$42 million (\$1.0m)	\$66 million (\$1.6m)
Franklin County	\$236 million (\$5.8m)	\$445 million (\$11.3m)
Ohio	\$632 million (\$15.3m)	\$4.1 billion (\$94.1m)

**Projections do not assume future development within the Arena District, only existing development*

Executive Summary

Nationwide Arena serves as a major economic engine to the Central Ohio Region and State of Ohio, both catalyzing and anchoring one of the Country's premiere professional sports-oriented mixed use development districts. This Economic Impact Analysis overviews the economic impacts of the Arena to Franklin County.

Catalyzing and Anchoring the Arena District

- Constructed in 1999, Nationwide Arena catalyzed the Arena District, which now includes over 19,905 employees, \$1.7 billion in labor income and \$6.4 billion in economic impact.
- The Arena District's impacts reverberate throughout Franklin County, supporting an additional 13,858 jobs, of which 8,243 indirect jobs are from supplier activity and 5,615 jobs are caused by household spending of Labor Income caused by the District.
- Arena District building structures constructed or remodeled prior to the construction of Nationwide Arena (from 1900-1999) carry an improved property value of \$402 million. Since the construction of Nationwide Arena, building structures built or remodeled carry an improved property value of \$1.413 billion.
- The market value of Arena District properties has increased by an average of 472% since 2000, while all non-Arena District properties within the City of Columbus have increased by an average of 128% over the same period.
- Since the construction of Nationwide Arena, 5.6 million in square footage of new construction has occurred and 1.6 million square feet in remodeled construction has occurred.
- Since 2000, compared to the City of Columbus, the Arena District has experienced the following growth: a 514% increase in employment compared to 10% Citywide, 158% increase in housing units compared to 26.9% Citywide and 329% in median household income compared to 44% Citywide.

Driving Visitors and Tourism

- Nationwide Arena brings approximately 949,246 annual event attendees, which includes 354,623 attendees estimated as overnight guests to the City of Columbus.

- Nationwide Arena event tourists spend approximately \$117 million annually on lodging, food & beverage, retail, entertainment, and transportation as Columbus guests.
- Visitor spending from Nationwide Arena event attendees creates additional indirect and induced spending of \$79 million annually by area suppliers and households and supports 1,592 employees Countywide.

Contributing Annually from Nationwide Arena and Hockey Operations

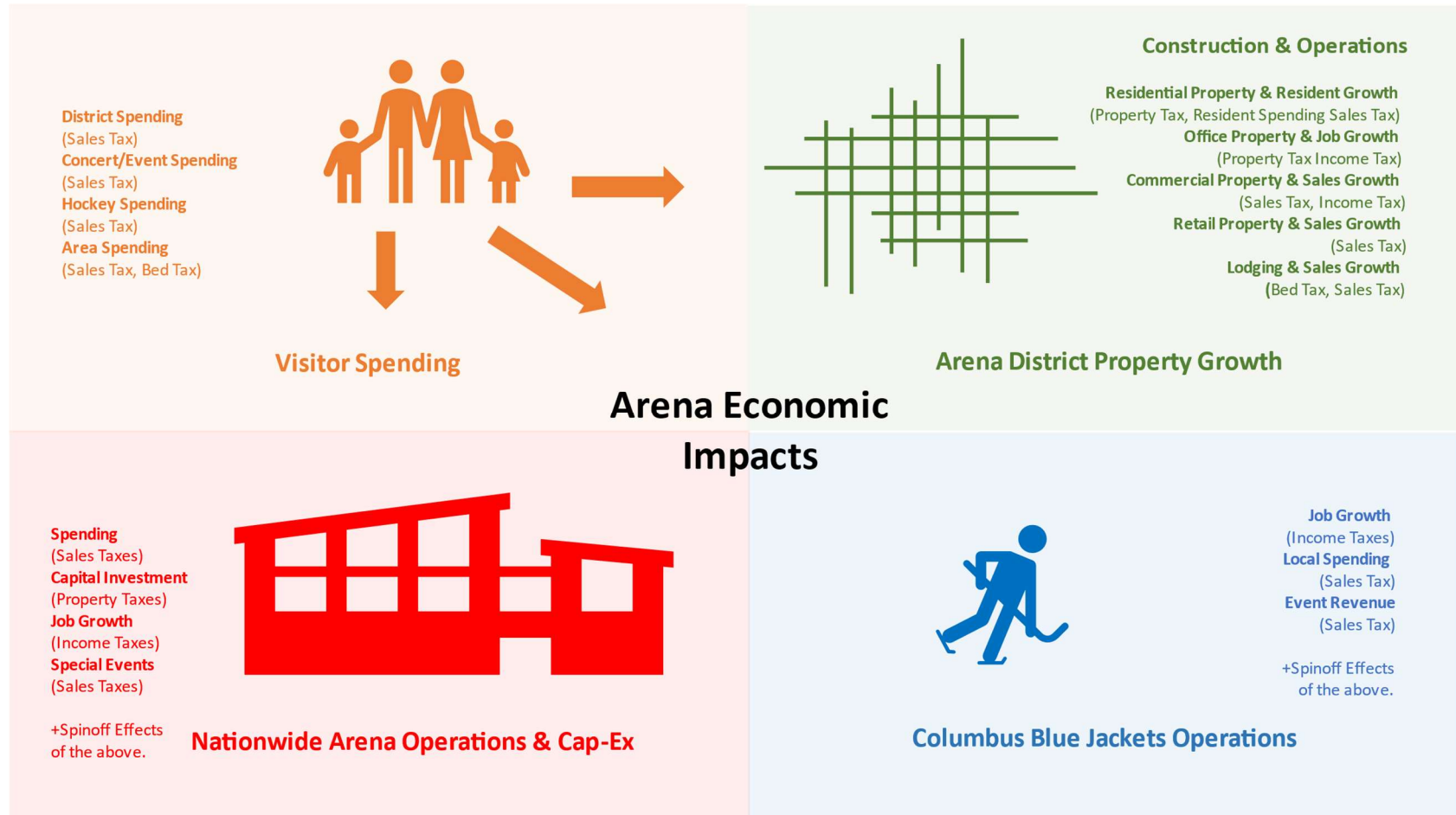
- Nationwide Arena operations employ 733 direct full-time and part time employees and further spinoff effects generated from Arena spending annually supports an additional 208 indirect and induced employees to Franklin County.
- The Columbus Blue Jackets operations employ 274 full-time and part-time employees and further spinoff effects generated from Blue Jackets spending annually supports an additional 497 indirect and induced employees to Franklin County.

Putting it all Together

- Nationwide Arena has served as the catalyst for over 33,763 full-time and part time jobs in Franklin County and \$9.3 billion in annual economic output, of which 4,431 jobs and \$280 million in economic output are a result of the Arena (and Columbus Blue Jackets). Further, Arena events are the result of an additional \$182 million in overall annual spending Countywide, including \$117 million in direct spending by event attendees.
- Over a 30-year period, Nationwide Arena operations and event visitors will generate \$266 million in income taxes to state and local governments, \$356 million in sales taxes to state and local governments and \$240 million in lodging taxes to state and local governments.
- Over a 30-year period, Nationwide Arena's catalytic effect to the development of the Arena District will have generated \$414 million in property taxes (of which a large portion contributes to public infrastructure improvements), \$4.1 billion in income taxes to state and local governments, \$707 million in sales taxes to state and local governments and \$349 million in lodging taxes to state and local governments and an additional \$3 billion in indirect state & local taxes over the same 30-year period.

- From a construction standpoint, construction activity within the Arena District since construction of Nationwide Arena has resulted in an estimated 9,000 construction jobs, \$540 million in wages and \$567 million in construction materials purchases, resulting in \$27 million in State & Local income taxes and \$42 million in State and Local sales taxes.

Economic & Tax Impacts Overview



Comparative Economic Impacts – Tax Type

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Introduction

As recently as the 1990s, Columbus was the largest city in America without a downtown arena and a major league sports franchise. In 1997, collaboration between Nationwide, the City of Columbus, and other community leaders began to change that. Nationwide Realty Investors crafted the original 75-acre master plan for the Arena District and developed the iconic arena for the city's new Columbus Blue Jackets NHL franchise, turning the once blighted area into today's vibrant urban neighborhood and serving as the catalyst and centerpiece of a revitalized downtown.

Today, the 200-acre Arena District has surpassed \$2.2 billion in investment. The premier downtown neighborhood attracts world-class businesses and top talent, draws national conventions and major sporting events, and enhances the city's image and quality of life for Columbus residents. With 2.5 million square feet of offices, 1100 residences, restaurants, hotels, and the city's three professional sports and entertainment venues lining Nationwide Boulevard, the Arena District has not only fulfilled its promise to serve as an economic engine but has affirmed its status as a defining downtown Columbus anchor.

This analysis was conducted by Vista Site Selection LLC ("Vista") and analyzed the economic impacts of Nationwide Arena to Franklin County. To undertake this analysis, data was collected from Nationwide Arena staff, the Columbus Blue Jackets and a variety of other sources in order to properly analyze the contribution of Nationwide Arena to Franklin County from the perspective of Nationwide Arena operations, Columbus Blue Jackets hockey operations, property growth to the surrounding area known as the "Arena District" and spending by visitors attending Nationwide Arena events.

Analysis Methodology & Data Collection

- Data collected from the Columbus Blue Jackets ("CBJ") related to arena and CBJ operations.
- Property data from the Franklin County Auditor and other sources in estimating Arena District growth.
- Data collected from Nationwide Arena related to Arena operations and aggregated geography of event visitors.
- Estimation of direct taxes related to operations and visitor spending calculated by Vista.

- Data collected from the Franklin County Auditor reporting software related to property taxes, land use and property-related payments in lieu of taxes for the Arena District.
- Indirect and Induced taxes estimated utilizing calculations made by IMPLAN Economic Modeling Software (“IMPLAN”).

Key Economic Impact Terminology from IMPLAN Economic Modeling Software utilized.

- **Employment** - Employment in IMPLAN is an Industry-specific mix of full-time, part-time, and seasonal employment. It is an annual average that accounts for seasonality and follows the same definition used by the Bureau of Labor Statistics (BLS) and Bureau of Economic Analysis (BEA). IMPLAN Employment is not equal to full time equivalents.
- **Labor Income** – Labor Income in IMPLAN includes all forms of Employment income, including Employee Compensation (wages, salaries, and benefits) and Proprietor Income.
- **Value Added** – Value Added in IMPLAN refers to the difference between an Industry's or establishment's total Output and the cost of its Intermediate Inputs; it is a measure of the contribution to GDP.
- **Output** – Output in IMPLAN, for all Industries, equals the value of Industry production, which is equal to sales plus net inventory change. In IMPLAN these are annual production estimates for the year of the dataset in producer prices. Note that for wholesale and retail sectors, Output is equal to gross wholesale margin or gross retail margin, respectively, not gross sales. The value of production for wholesale and retail sectors is the value of the services they provide; it does not include the value of the items sold within their establishment.
- **Direct Effects** - one or more production changes or expenditures made by producers/consumers as a result of an activity or policy. In the case of Arena Operations, it is direct expenditures made or revenues realized by the Arena Operator and its vendors. For Visitor Spending, while traditionally an “indirect” activity, refers to the expenditures made by visitors into the community who are consuming arena district events. As it relates to Arena District impacts, Direct refers to the construction and operations of businesses and residences in the Arena District.
- **Indirect Effects** - Economic Effects stemming from business-to-business purchases in the supply chain.

- **Induced Effects** - Economic Effects stemming from household spending of Labor Income, after removal of taxes, savings, and commuter income.

Causality of the Sports & Entertainment Industry

Nationwide Arena events and the Columbus Blue Jackets fall within what is referred to in this document as the “Sports & Entertainment Industry.” In order to properly contextualize the position of the Sports & Entertainment Industry within the local and regional economy and its depth of industry reach, this section provides information related to industry spending and industry multipliers, relative to the 43215 Zip Code and Franklin County.

The technical classification of the Sports & Entertainment Industry is the subsector “Performing Arts, Spectator Sports, and Related Industries” falling within the larger Arts, Entertainment and Recreation Sector. For purposes of this document we will refer to it as the “Sports and Entertainment Industry.” This industry is made up of organizations producing, organizing and promoting live presentations involving the performances of actors and actresses, singers, skilled artistic performers, musical groups and artists, athletes, and others, including independent entertainers and organizations managing the entertainer’s career. The classification recognizes four primary business activities: 1) producing events, 2) organizing, managing, and/or promoting events, (3) managing and representing entertainers; and (4) providing the artistic, creative and technical skills necessary to the production of these live events.

Commercial Sports Except Racing¹, one of the largest segments of the Sports and Entertainment Industry possesses the highest economic output (sales) multiplier to the 43215 zip code aside from power, electricity & energy distribution². This represents the highest degree (in dollars) of sales causality to other industries within the 43215 zip code. Further, this segment represents the third largest sales multiplier in Franklin County. An economic multiplier represents the impact per \$1 of economic activity in a given industry. In the 43215 zip code, this means \$1.25 is generated for \$1 spent in the industry and in Franklin County \$2.44 is generated for every \$1

¹ IMPLAN industry code 497, which includes commercial and compensated sports organizations, athletes, trainers and instructors.

² IMPLAN 2019 Economic Output Multiplier Summary – 43215 Zip Code and Franklin County datasets.

spent. The table below illustrates this industry segment, along with other related segments within the Sports & Entertainment Industry.

43215 Zip Code		
Arena Industries	Sales Multiplier	43215 Rank
Commercial Sports Except Racing	1.25	2
Promoters of performing arts and sports and agents for public figures	1.10	13
Performing arts companies	1.08	31
Independent artists, writers, and performers	1.06	63

FRANKLIN COUNTY		
Arena Industries	Sales Multiplier	County Rank
Commercial Sports Except Racing	2.44	3
Promoters of performing arts and sports and agents for public figures	1.78	113
Performing arts companies	1.70	166
Independent artists, writers, and performers	1.34	394

Industry Purchasing (Franklin County)

The Sports and Entertainment industry causes \$274.2 million in annual purchasing of which \$200 million occurs within Franklin County³. The table below represents Franklin County industry purchasing (annual purchases above \$1 million) caused by the Sports & Entertainment Industry. For purposes of this table, the “Sports and Entertainment Industry” includes industries within the following NAICS Code Description:

- Sporting and Recreational Goods and Supplies Merchant Wholesalers
- All Other Travel Arrangement and Reservation Services
- Sports and Recreation Instruction
- Musical Groups and Artists

³ Data provided by Lightcast Input-Output Model, Industry Sales 2022

- Sports Teams and Clubs
- Promoters of Performing Arts, Sports, and Similar Events with Facilities
- Promoters of Performing Arts, Sports, and Similar Events without Facilities
- All Other Amusement and Recreation Industries

NAICS	Purchases from	In-region Purchases	Total Purchases
711211	Sports Teams and Clubs	\$36,596,658	\$36,601,100
551114	Corporate, Subsidiary, and Regional Managing Offices	\$14,452,830	\$15,419,227
711410	Agents and Managers for Artists, Athletes, Entertainers, and Other Public Figures	\$1,326,965	\$10,321,446
711510	Independent Artists, Writers, and Performers	\$4,170,448	\$9,850,216
711310	Promoters of Performing Arts, Sports, and Similar Events with Facilities	\$7,333,318	\$9,642,192
519130	Internet Publishing and Broadcasting and Web Search Portals	\$2,384,468	\$8,785,907
711320	Promoters of Performing Arts, Sports, and Similar Events without Facilities	\$8,567,728	\$8,776,062
531110	Lessors of Residential Buildings and Dwellings	\$7,426,562	\$7,428,225
531210	Offices of Real Estate Agents and Brokers	\$4,334,554	\$6,155,928
531120	Lessors of Nonresidential Buildings (except Miniwarehouses)	\$4,337,344	\$5,180,227
561320	Temporary Help Services	\$4,597,173	\$4,597,560
531390	Other Activities Related to Real Estate	\$2,973,990	\$4,523,128
711219	Other Spectator Sports	\$2,543,120	\$4,350,480
524210	Insurance Agencies and Brokerages	\$1,967,990	\$4,341,103
533110	Lessors of Nonfinancial Intangible Assets (except Copyrighted Works)	\$4,209,495	\$4,209,751
541110	Offices of Lawyers	\$3,402,564	\$3,753,759
518210	Data Processing, Hosting, and Related Services	\$3,524,690	\$3,527,219
531311	Residential Property Managers	\$2,811,062	\$2,812,911
541810	Advertising Agencies	\$1,889,243	\$2,389,683
611710	Educational Support Services	\$2,020,220	\$2,319,514
611310	Colleges, Universities, and Professional Schools	\$1,273,592	\$2,260,079
541611	Administrative Management and General Management Consulting Services	\$1,752,291	\$2,227,779
522110	Commercial Banking	\$2,212,178	\$2,222,051
492110	Couriers and Express Delivery Services	\$1,946,048	\$2,150,172
711212	Racetracks	\$1,248,676	\$1,886,343
531130	Lessors of Miniwarehouses and Self-Storage Units	\$1,558,701	\$1,837,136

NAICS	Purchases from	In-region Purchases	Total Purchases
722511	Full-Service Restaurants	\$1,781,596	\$1,813,997
561110	Office Administrative Services	\$1,765,924	\$1,765,971
515120	Television Broadcasting	\$915,063	\$1,762,437
541211	Offices of Certified Public Accountants	\$1,506,511	\$1,643,240
531312	Nonresidential Property Managers	\$1,356,373	\$1,554,608
721110	Hotels (except Casino Hotels) and Motels	\$988,650	\$1,460,353
493110	General Warehousing and Storage	\$1,359,470	\$1,440,012
485310	Taxi Service	\$595,886	\$1,431,803
485320	Limousine Service	\$948,089	\$1,365,805
541512	Computer Systems Design Services	\$1,116,156	\$1,346,978
517311	Wired Telecommunications Carriers	\$1,299,184	\$1,304,486
221122	Electric Power Distribution	\$744,659	\$1,280,377
531190	Lessors of Other Real Estate Property	\$758,702	\$1,266,423
541990	All Other Professional, Scientific, and Technical Services	\$690,898	\$1,194,436
561510	Travel Agencies	\$577,507	\$1,165,531
561730	Landscaping Services	\$1,123,169	\$1,150,493
611430	Professional and Management Development Training	\$766,736	\$1,120,190
323111	Commercial Printing (except Screen and Books)	\$295,289	\$1,107,972
517312	Wireless Telecommunications Carriers (except Satellite)	\$728,826	\$1,072,896
522292	Real Estate Credit	\$1,070,140	\$1,070,149
561720	Janitorial Services	\$881,716	\$1,068,331
324110	Petroleum Refineries	\$286,223	\$1,046,638
611620	Sports and Recreation Instruction	\$639,999	\$1,043,520
561990	All Other Support Services	\$1,036,739	\$1,036,773
561599	All Other Travel Arrangement and Reservation Services	\$384,593	\$1,023,199

Industry Sales (Franklin County)

The Sports and Entertainment industry causes \$337.6 million in annual sales to businesses realized within Franklin County⁴. The table below represents Franklin County Industry sales (annual purchases above \$1 million) caused by the Sports & Entertainment Industry.

⁴ Data provided by Lightcast Input-Output Model, Industry Sales 2022

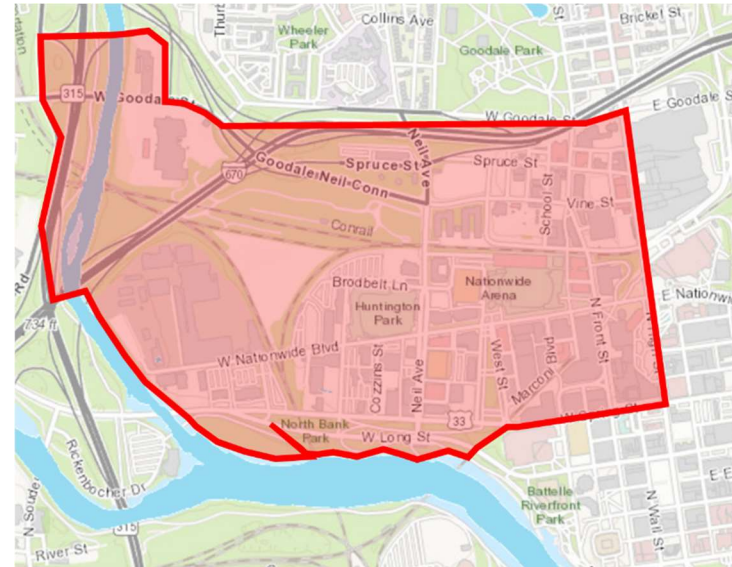
NAICS	Sales to	Total In-Region Sales
711211	Sports Teams and Clubs	\$46,331,591
551114	Corporate, Subsidiary, and Regional Managing Offices	\$23,275,157
481211	Nonscheduled Chartered Passenger Air Transportation	\$13,339,229
524126	Direct Property and Casualty Insurance Carriers	\$10,448,926
515120	Television Broadcasting	\$8,405,754
902999	State Government, Excluding Education and Hospitals	\$8,218,074
902622	Hospitals (State Government)	\$7,019,526
515112	Radio Stations	\$4,894,762
561990	All Other Support Services	\$4,839,368
722513	Limited-Service Restaurants	\$4,721,038
561320	Temporary Help Services	\$4,648,892
711510	Independent Artists, Writers, and Performers	\$4,645,858
611310	Colleges, Universities, and Professional Schools	\$4,350,943
531110	Lessors of Residential Buildings and Dwellings	\$4,122,545
454110	Electronic Shopping and Mail-Order Houses	\$3,917,757
561110	Office Administrative Services	\$3,679,035
813110	Religious Organizations	\$3,655,007
621111	Offices of Physicians (except Mental Health Specialists)	\$3,173,987
711320	Promoters of Performing Arts, Sports, and Similar Events without Facilities	\$3,112,335
903999	Local Government, Excluding Education and Hospitals	\$2,731,122
711310	Promoters of Performing Arts, Sports, and Similar Events with Facilities	\$2,631,546
711219	Other Spectator Sports	\$2,531,599
441110	New Car Dealers	\$2,518,433
518210	Data Processing, Hosting, and Related Services	\$2,412,342
813910	Business Associations	\$2,341,129
531210	Offices of Real Estate Agents and Brokers	\$2,283,249
541611	Administrative Management and General Management Consulting Services	\$2,257,163
238220	Plumbing, Heating, and Air-Conditioning Contractors	\$2,247,613
541110	Offices of Lawyers	\$2,237,685
238210	Electrical Contractors and Other Wiring Installation Contractors	\$2,218,934
531120	Lessors of Nonresidential Buildings (except Miniwarehouses)	\$2,211,118

NAICS	Sales to	Total In-Region Sales
523930	Investment Advice	\$2,198,604
622110	General Medical and Surgical Hospitals	\$2,159,804
512110	Motion Picture and Video Production	\$2,152,898
333415	Air-Conditioning and Warm Air Heating Equipment and Commercial and Industrial Refrigeration Equipment Manufacturing	\$1,972,231
533110	Lessors of Nonfinancial Intangible Assets (except Copyrighted Works)	\$1,949,808
424210	Drugs and Druggists' Sundries Merchant Wholesalers	\$1,910,327
236220	Commercial and Institutional Building Construction	\$1,828,070
541330	Engineering Services	\$1,814,832
311514	Dry, Condensed, and Evaporated Dairy Product Manufacturing	\$1,733,123
445110	Supermarkets and Other Grocery (except Convenience) Stores	\$1,675,801
522320	Financial Transactions Processing, Reserve, and Clearinghouse Activities	\$1,644,553
541810	Advertising Agencies	\$1,619,638
531311	Residential Property Managers	\$1,597,738
531390	Other Activities Related to Real Estate	\$1,565,338
541715	Research and Development in the Physical, Engineering, and Life Sciences (except Nanotechnology and Biotechnology)	\$1,563,388
722511	Full-Service Restaurants	\$1,531,430
524114	Direct Health and Medical Insurance Carriers	\$1,500,785
901199	Federal Government, Civilian, Excluding Postal Service	\$1,450,305
488510	Freight Transportation Arrangement	\$1,444,972
517311	Wired Telecommunications Carriers	\$1,407,590
541211	Offices of Certified Public Accountants	\$1,405,667
711212	Racetracks	\$1,296,585
813410	Civic and Social Organizations	\$1,281,570
813920	Professional Organizations	\$1,201,576
522292	Real Estate Credit	\$1,198,653
423110	Automobile and Other Motor Vehicle Merchant Wholesalers	\$1,190,319
813930	Labor Unions and Similar Labor Organizations	\$1,139,893
561730	Landscaping Services	\$1,053,825
336112	Light Truck and Utility Vehicle Manufacturing	\$1,039,689
339920	Sporting and Athletic Goods Manufacturing	\$1,023,908
901200	Federal Government, Military	\$1,008,246

Geography

The analysis covers the following geographic distinctions:

- **Arena District** – the Arena District follows the Franklin County Appraisal Neighborhood Codes 01102 and 01103.
- **43215 Zip Code** – the zip code encompassing Downtown Columbus and the Arena District.
- **City of Columbus** – Direct effects of economic impacts are based on activity occurring within the City of Columbus, Franklin County.
- **Cities throughout Franklin County** – Indirect and Induced effects may include impacts to other Cities within Franklin County. For instance, an Indirect or Induced impact may create municipal income taxes to a City, however it may not necessarily be the City of Columbus.
- **Franklin County** – Indirect and Induced economic impacts of this analysis span all of Franklin County, in other words this analysis covers the depth of the spinoff impacts from the Arena and Arena District to the entirety of Franklin County.



The image above depicts the two Neighborhood Appraisal Codes constituting the “Arena District” from the Franklin County Auditor.

Columbus Blue Jackets Operations

The Columbus Blue Jackets, a member club of the National Hockey League, compete in the Metropolitan Division of the Eastern Conference calling Nationwide Arena home since the club's inaugural 2000-01 season. The CBJ has earned six berths in the Stanley Cup Playoffs (2009, 2014, 2017, 2018, 2019, 2020) and engineered one of the biggest playoff upsets in NHL history when they swept the top-seeded Tampa Bay Lightning in the Eastern Conference Quarterfinals in 2019.

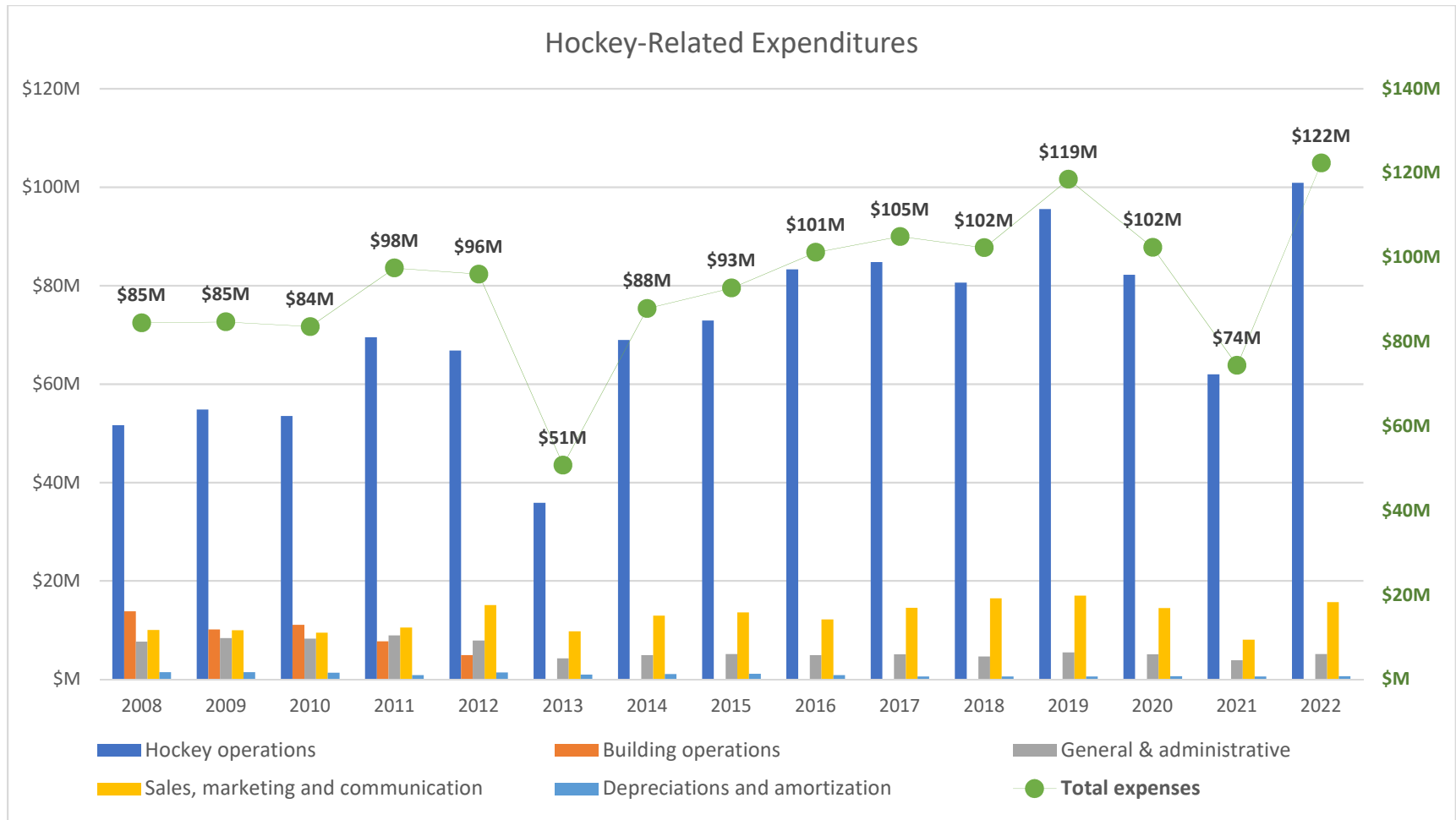
The club's arrival, along with Nationwide Arena, changed the fabric of the city as the centerpieces of The Arena District, 2.5 million square feet of office space, retail, restaurants, entertainment venues and residences. The Blue Jackets have brought world-class events like the 2015 NHL All-Star Game, 2007 NHL Draft and two Team USA World Cup of Hockey training camps to downtown Columbus and attracted over 14 million fans to its games over the past two decades.

The Blue Jackets and the Blue Jackets charitable foundation are dedicated to making a difference in the community both on and off the ice. The mission of the CBF is supporting the health and wellness of children throughout central Ohio. Since the team's inception, the Foundation has provided nearly \$14 million to numerous local organizations in the areas of pediatric cancer, reading, health and safety and the growth and development of youth hockey.

The table below illustrates the Economic Impact of Columbus Blue Jackets Operations:

Economic Impact Summary⁵				
Impact	Employment	Labor Income	Value Added	Output
1 - Direct	374	\$67,273,037	\$56,063,140	\$113,733,504
2 - Indirect	225	\$12,750,798	\$21,285,002	\$37,434,742
3 - Induced	272	\$16,205,132	\$29,666,354	\$48,926,888
	871	\$96,228,968	\$107,014,496	\$200,095,134

⁵ IMPLAN Economic Modeling Software – Input/Output Model – 2021 Data



The chart above illustrates expenditures made by the Columbus Blue Jackets annually, including the specific components that constitute total expenditures. The chart illustrates a clear trend of increased expenditures, with Hockey Operations accounting for the largest contributor to this trend⁶.

⁶ Data provided by Columbus Arena Management

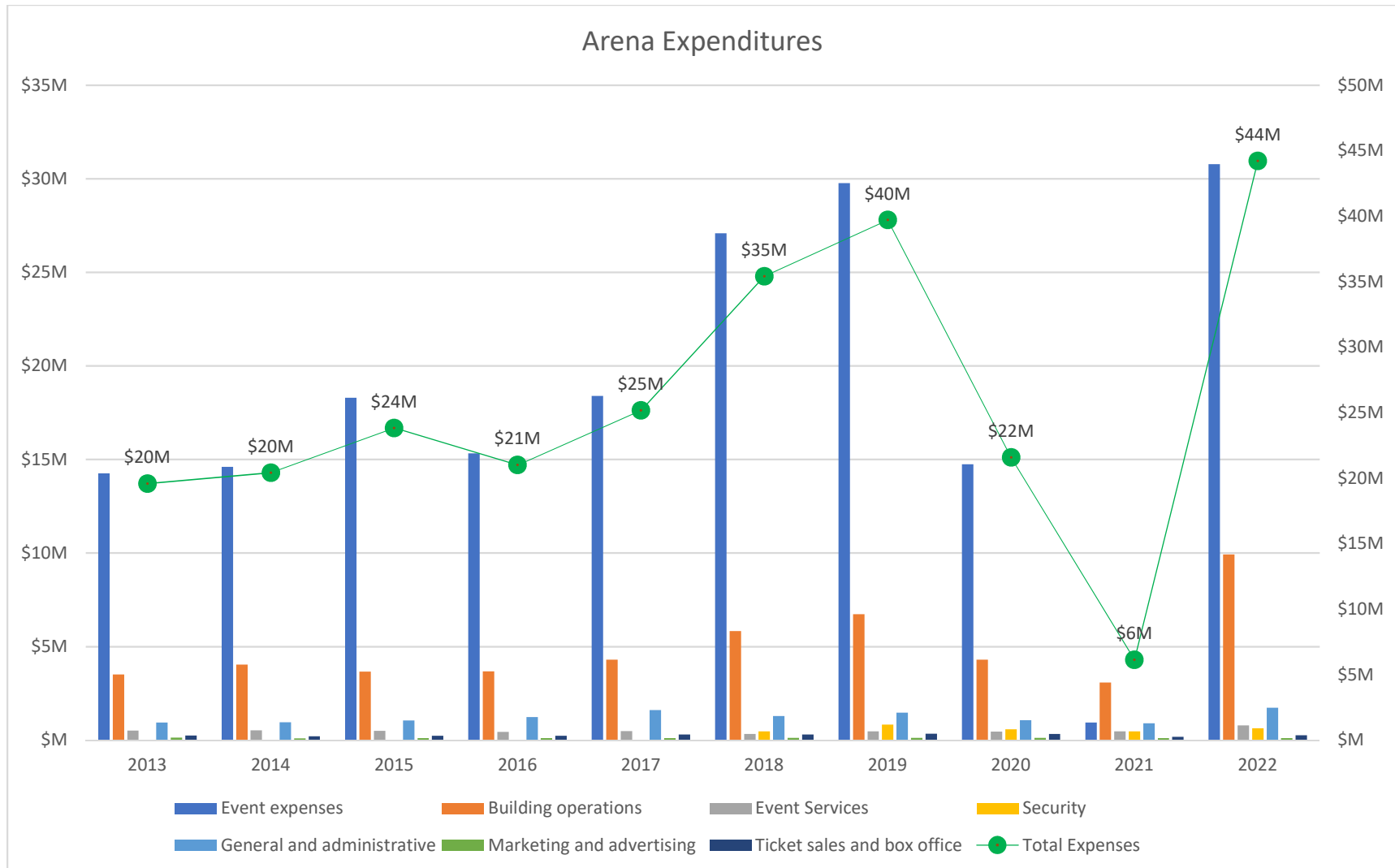
Nationwide Arena Operations

In addition to the impact of the Columbus Blue Jackets, Nationwide Arena serves as a significant economic engine based on its annual programming and entertainment outside of Columbus Blue Jackets events. Nationwide Arena brings millions of spectators annually to attend concerts and special events.

The table below illustrates the Economic Impact of Nationwide Arena Operations.

Nationwide Arena Economic Impact Summary⁷				
Impact	Employment	Labor Income	Value Added	Output
1 - Direct	733	\$11,846,513	\$27,067,606	\$48,767,813
2 - Indirect	147	\$6,438,933	\$11,282,086	\$20,957,793
3 - Induced	61	\$3,667,740	\$6,713,336	\$11,070,370
	941	\$21,953,186	\$45,063,028	\$80,795,976

⁷ IMPLAN Economic Modeling Software – Input/Output Model – 2021 Data



The chart above illustrates expenditures made by Nationwide Arena annually, including the specific components that constitute total expenditures⁸. The chart illustrates a clear trend of increased expenditures, with Hockey Operations accounting for the largest contributor to this trend.

⁸ Data provided by Columbus Arena Management

Arena Impact to County-wide Sales (Blue Jackets and Arena Events)⁹

Industry Group	Direct Sales Impact	Indirect Sales Impact	Induced Sales Impact	Total Sales Impact
Agriculture	\$0	\$109	\$238	\$347
Commercial	\$0	\$22,940,852	\$15,196,308	\$38,137,160
Construction	\$0	\$825,672	\$656,885	\$1,482,556
Dining	\$0	\$620,220	\$3,074,595	\$3,694,816
Education	\$0	\$1,406,778	\$763,792	\$2,170,570
Energy	\$0	\$25,249	\$51,624	\$76,873
Entertainment	\$162,501,317	\$17,065,882	\$7,486,360	\$187,053,559
Government	\$0	\$839,424	\$643,682	\$1,483,107
Manufacturing	\$0	\$484,458	\$643,135	\$1,127,593
Medical	\$0	\$152,113	\$9,094,943	\$9,247,057
Mining	\$0	\$291,620	\$258,104	\$549,724
Residential	\$0	\$0	\$6,967,013	\$6,967,013
Retail	\$0	\$2,665,056	\$10,987,788	\$13,652,844
Transportation	\$0	\$2,138,638	\$1,337,216	\$3,475,854
Warehousing	\$0	\$311,767	\$382,192	\$693,959
Wholesale	\$0	\$370,819	\$1,058,781	\$1,429,600
Grand Total	\$162,501,317	\$50,138,658	\$58,602,656	\$271,242,631

⁹ IMPLAN Economic Modeling Software – Input/Output Model – 2021 Data; Data aggregated by Vista Site Selection

Arena Visitor Spending

The table below illustrates the Economic Impact of Arena Visitor Spending.

Visitor Activity Economic Impact Summary¹⁰				
Impact	Employment	Labor Income	Value Added	Output
1 - Direct	1,187	\$35,376,659	\$56,431,032	\$103,037,052
2 - Indirect	227	\$15,763,005	\$26,892,478	\$48,154,322
3 - Induced	178	\$10,542,004	\$19,268,409	\$31,786,858
	1,592	\$61,681,668	\$102,591,919	\$182,978,231

Visitor Spending Methodology

Visitor spending activity was gathered using data provided by Nationwide Arena. All event attendees were categorized into a “Drive Category” or a “Stay Category” based on the Region in which their resident originates. A Drive category means the visitor’s region is less than 90 miles away from the event location. A rule-of-thumb is 120 miles that dictates a drive vs. stay, however a 90-mile metric was used as the majority of Arena events take place in the evening. A Stay category means the visitor’s region is more than 90 miles away from the event location. In Ohio, Ohio Regions estimated as “Stay” regions include Cleveland, Youngstown, Toledo and Cincinnati.

Tourism and Local Participation Data is derived from the U.S. Travel and Tourism Satellite Accounts and rates produced by the Regional Tourism & Convention Bureau data. Factors and cost categories were adjusted upward or downward based on local market and economic conditions (ie increased prices for hotel room rates compared to when data was compiled).

¹⁰ IMPLAN Economic Modeling Software – Input/Output Model – 2021 Data

Below are estimated spending rates per visitor utilized on calculations:

Stay Visitor per

Day

\$204

\$ per

Category Description

<i>Lodging</i>	41.61%	\$85.00	This represents room costs per person, hence the amount being less than the price of a Downtown Columbus room.
<i>F&B</i>	28.58%	\$58.38	Assumes meals being purchased prior to event or during event.
<i>Retail</i>	14.50%	\$29.63	Typically reserved for surrounding retail, such as souvenirs, apparel, convenience, etc.
<i>Entertainment</i>	6.40%	\$13.07	Assumes consumption of additional entertainment
<i>Transportation</i>	8.92%	\$18.22	Factors in the cost of transportation (parking, rideshare, etc.).

Drive Visitor per

Day

\$75

\$ per

<i>Lodging</i>	0.00%	\$0.00
<i>F&B</i>	63.82%	\$47.87
<i>Retail</i>	18.23%	\$13.68
<i>Entertainment</i>	9.12%	\$6.84
<i>Transportation</i>	8.83%	\$6.62

2022 Non-CBJ Visitor Activity ¹¹	Face Value Tickets Sold	Attendance	Attendance %
Drive	\$15,212,119	172,988	58.27%
Amateur Sports	\$22,753	1,288	0.43%
Ceremony	\$71,734	2,654	0.89%
Comedy	\$934,340	9,020	3.04%
Educational	\$398,992	4,228	1.42%
Kids Entertainment	\$1,424,448	43,489	14.65%
Music Concert	\$11,363,023	97,110	32.71%
Professional Sports	\$996,829	15,199	5.12%
Stay	\$11,596,111	123,872	41.73%
Amateur Sports	\$34,609	1,984	0.67%
Ceremony	\$5,159	168	0.06%
Comedy	\$568,569	6,852	2.31%
Educational	\$249,074	2,646	0.89%
Kids Entertainment	\$336,452	10,337	3.48%
Music Concert	\$9,455,887	89,567	30.17%
Professional Sports	\$946,362	12,318	4.15%
Grand Total	\$26,808,230	296,860	100.00%

¹¹ Data provided by Columbus Arena Management – Calendar Year 2022 activity.

The tables below represent markets in which non-CBJ event attendees originated from. This list is not all-inclusive, but rather areas that witnessed over 1,000 attendees during the course of the year.

Market (non-CBJ Events)	Tickets Sold
Columbus, Oh	138,793
Dayton	24,629
Cleveland-Akron (Canton)	20,277
Cincinnati	12,970
Charleston-Huntington	9,156
Toledo	6,469
Zanesville	5,242
New York	4,797
Los Angeles	4,061
Miami-Ft. Lauderdale	3,837
Chicago	3,504
Pittsburgh	3,136
Indianapolis	3,073
Lima	3,073
Detroit	2,461
San Diego	2,389
Minneapolis-St. Paul	2,062

Market (non-CBJ Events)	Tickets Sold
Youngstown	1,935
Parkersburg	1,891
Denver	1,889
Atlanta	1,558
Philadelphia	1,522
Kansas City	1,472
Washington, Dc (Hagrstwn)	1,405
Louisville	1,278
Wheeling-Steubenville	1,251
Seattle-Tacoma	1,074
Boston (Manchester)	1,073
Ft. Wayne	1,072
Tampa-St. Pete (Sarasota)	1,065
Phoenix (Prescott)	1,051
Houston	1,049
Lexington	1,022

The tables below illustrate estimated spending for Non-CBJ and CBJ games from visitors by Lodging, Food & Beverage, Retail, Entertainment and Transportation, including sales-based taxes based on estimated expenditures¹².

¹² Data provided by Columbus Arena Management – Calendar Year 2022 activity.

Non-CBJ Events		
Travel	Tickets Sold	T&T Spend
<i>Drive</i>	185,958	\$13,946,850
<i>Stay</i>	110,902	\$22,657,279
Spend Category	Drive Detailed Spend	Stay Detailed Spend
<i>Lodging</i>	\$0	\$9,426,809
<i>F&B</i>	\$8,901,162	\$6,474,629
<i>Retail</i>	\$2,543,189	\$3,285,633
<i>Entertainment</i>	\$1,271,595	\$1,449,544
<i>Transportation</i>	\$1,230,904	\$2,020,664
Total	\$13,946,850	\$22,657,279

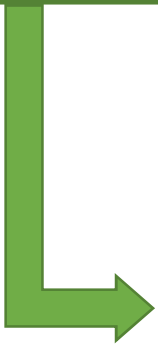
CBJ Games ¹³		
Travel	Tickets Sold	T&T Spend
<i>Drive</i>	408,666	\$30,649,933
<i>Stay</i>	243,721	\$49,792,180
Spend Category	Drive Detailed Spend	Stay Detailed Spend
<i>Lodging</i>	\$0	\$20,716,581
<i>F&B</i>	\$19,561,408	\$14,228,801
<i>Retail</i>	\$5,588,974	\$7,220,585
<i>Entertainment</i>	\$2,794,487	\$3,185,552
<i>Transportation</i>	\$2,705,063	\$4,440,660
Total	\$30,649,933	\$49,792,180

¹³ Data provided by Columbus Arena Management – Calendar Year 2022 activity. CBJ visitor originations estimated by Vista Site Selection based on Concert Event data provided by Columbus Arena Management.

Visitor spending serves as a significant sales tax generator to Franklin County and its political subdivisions. The table below overviews the estimated sales tax impacts of Visitor spending, including the calculation of hotel taxes and the distribution of such taxes to public policy initiatives including affordable housing, tourism, emergency human services, among others.

Taxes from Direct Visitor Sales Activity		
	Annual	30-yr Total
Ohio Sales Tax	\$6,730,159	\$273,029,617
County Sales Tax	\$1,463,078	\$59,354,265
COTA Sales Tax	\$585,231	\$23,741,706
County Bed Tax	\$2,901,730	\$117,717,630
City Bed Tax	\$3,553,139	\$144,144,037
Total	\$15,233,338	\$617,987,255

	Annual	30-yr Total
County Bed Tax	\$2,901,730	\$117,717,630
City Bed Tax	\$3,553,139	\$144,144,037



Franklin County Convention Facilities Authority	\$2,901,730	\$117,717,630
The Columbus Convention and Visitors Bureau (Promoting the City)	\$1,665,001	\$67,545,896
Cultural Services / Community Enrichment	\$1,170,404	\$47,481,046
Emergency Human Services fund of the City	\$418,204	\$16,965,753
Affordable Housing Trust	\$299,530	\$12,151,342

Visitor Spending Impact to County-wide Sales (Blue Jackets and Arena Events)

Industry Group ¹⁴	Direct Sales Impact	Indirect Sales Impact	Induced Sales Impact	Total Sales Impact
Agriculture	\$0	\$29	\$128	\$158
Commercial	\$0	\$21,941,492	\$8,232,652	\$30,174,144
Construction	\$0	\$1,251,808	\$355,653	\$1,607,461
Dining	\$49,166,000	\$551,981	\$1,661,193	\$51,379,173
Education	\$0	\$27,879	\$417,490	\$445,368
Energy	\$0	\$75,310	\$27,866	\$103,176
Entertainment	\$38,844,568	\$14,260,490	\$4,136,330	\$57,241,388
Government	\$0	\$1,111,035	\$347,795	\$1,458,829
Manufacturing	\$0	\$932,614	\$347,363	\$1,279,978
Medical	\$0	\$424	\$4,912,200	\$4,912,625
Mining	\$0	\$826,275	\$139,371	\$965,646
Residential	\$0	\$0	\$3,768,794	\$3,768,794
Retail	\$9,827,838	\$4,380,466	\$5,936,961	\$20,145,265
Transportation	\$5,198,646	\$1,212,109	\$724,638	\$7,135,393
Warehousing	\$0	\$866,660	\$206,585	\$1,073,244
Wholesale	\$0	\$715,750	\$571,839	\$1,287,589
Grand Total	\$103,037,052	\$48,154,322	\$31,786,858	\$182,978,231

¹⁴ IMPLAN Economic Modeling Software – Input/Output Model – 2021 Data; Data aggregated by Vista Site Selection

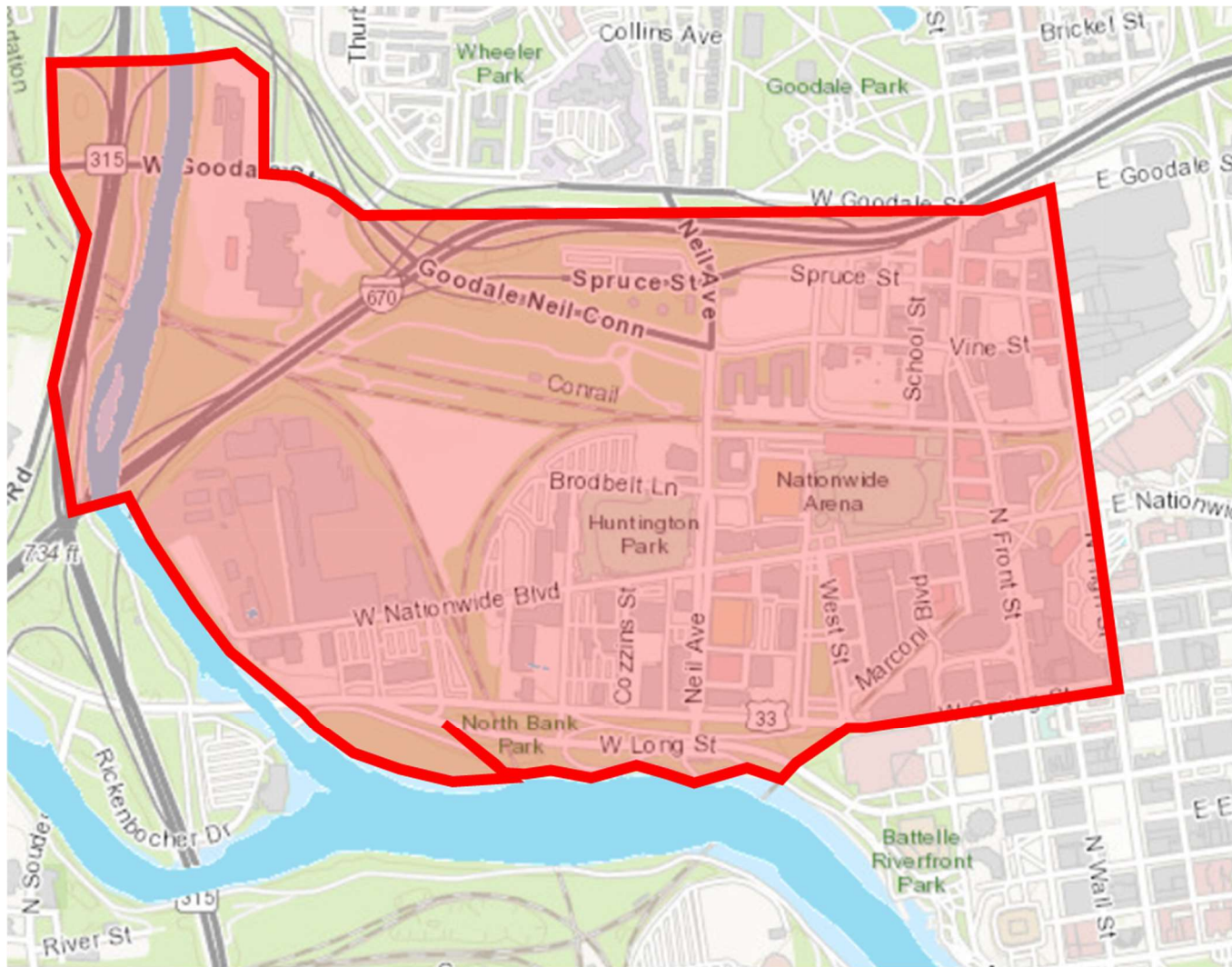
Arena District Property Growth

The table below illustrates the Economic Impact of the Growth of the Arena District since construction of Nationwide Arena.

Property Growth Economic Impact Summary				
Impact	Employment	Labor Income	Value Added	Output
1 - Direct	19,905	\$1,792,366,332	\$3,510,891,145	\$6,440,584,951
2 - Indirect	8,243	\$555,433,558	\$1,042,473,228	\$2,066,267,883
3 - Induced	5,615	\$342,001,203	\$508,929,703	\$860,384,882
	33,763	\$2,689,801,093	\$5,062,294,075	\$9,367,237,716

Arena District Geography

The image below represents the “Arena District. The Arena District boundary follows the Franklin County Appraisal Neighborhood Codes 01102 and 01103¹⁵.



¹⁵ Franklin County Auditor Appraisal Districts – 2022.

Property Value Impacts

The information in this section comes from an analysis conducted using Franklin County Auditor data for parcels within the Arena District as of calendar year 2022. Data was categorized based on Building Construction year and Building Remodel year for each parcel within the Arena District geography¹⁶.

Below is a summary of the improved Market Value of properties constructed or remodeled both before and after calendar year 2000.

- **New Construction**
 - \$350.5m improved Market Value (1900-1999)
 - \$1.135b improved Market Value (2000-2022)
- **Remodels**
 - \$52.1m improved Market Value (1900-1999)
 - \$279.3m improved Market Value (2000-2022)
- **Total Improved Market Value Since 2000**
 - \$1.413 billion (\$402m prior to 2000)

The data illustrates a 224% increase in the improved Market Value of properties constructed post-1999 compared to those constructed prior to 1999 and a 437% increase in the improved Market Value of properties remodeled over the same periods.

¹⁶ It is important to note that Franklin County Auditor data records smaller property improvements as a “Remodel” therefore parcels were individually reviewed to ensure that Remodeled property had at least 50% of square footage remodeled after 2000 to be included as a Remodeled structure.

The data below illustrates the base Market Value compared to the Total Market Value of properties built or remodeled after 1999 by Land Use Category. It is worth noting that two large professional sports facilities, the Columbus Crew soccer stadium and the Columbus Clippers baseball stadium carried classifications of “Institutional” and “Warehouse” land uses, as indicated in the tables below.

Arena District New Builds after 1999

Use Category	Acres	Base Market Value	Total Market Value
Commercial	2	\$4,700	\$1,495,100
Entertainment	2	\$719,900	\$4,290,000
Institutional (Clippers)	8	\$0	\$75,960,500
Lodging	2	\$15,171,900	\$87,221,900
Office	33	\$39,246,700	\$377,801,800
Parking	5	\$6,543,300	\$49,266,300
Residential	181	\$2,343,400	\$314,295,800
Warehouse (Crew)	11	\$14,670,900	\$293,666,000
Grand Total	243	\$78,700,800	\$1,213,997,030

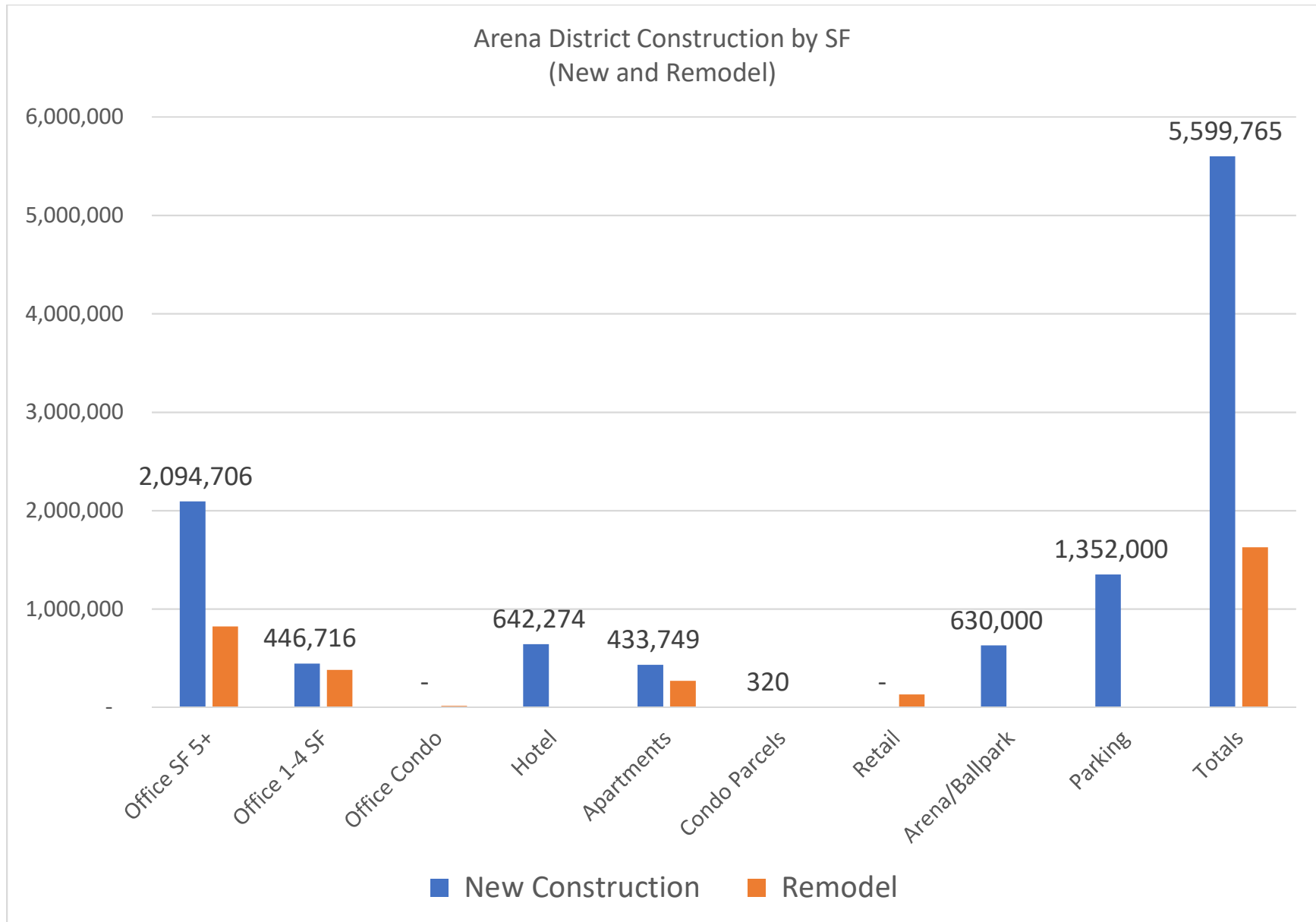
Arena District: Remodels after 1999

Use Category	Acres	Base Market Value	Total Market Value
Food & Beverage	2	\$2,587,400	\$9,950,700
Institutional	0	\$0	\$13,083,400
Lodging	0	\$18,125,000	\$18,125,000
Office	26	\$183,694,200	\$332,581,100
Residential	30	\$1,276,000	\$74,845,000
Retail	1	\$1,868,100	\$7,578,000
Warehouse (Garages)	5	\$346,500	\$31,083,600
Grand Total	64	\$207,897,200	\$487,246,800

The table below illustrates the difference in Base Market Value and Total Market Value of properties by Land Use category of the Arena District compared to Columbus properties outside of the Arena District. Arena District properties have realized a 472% increase in Total Market Value over Base Values with the rest of the City of Columbus realizing a 128% increase in Total Market Value over Base Market Value.

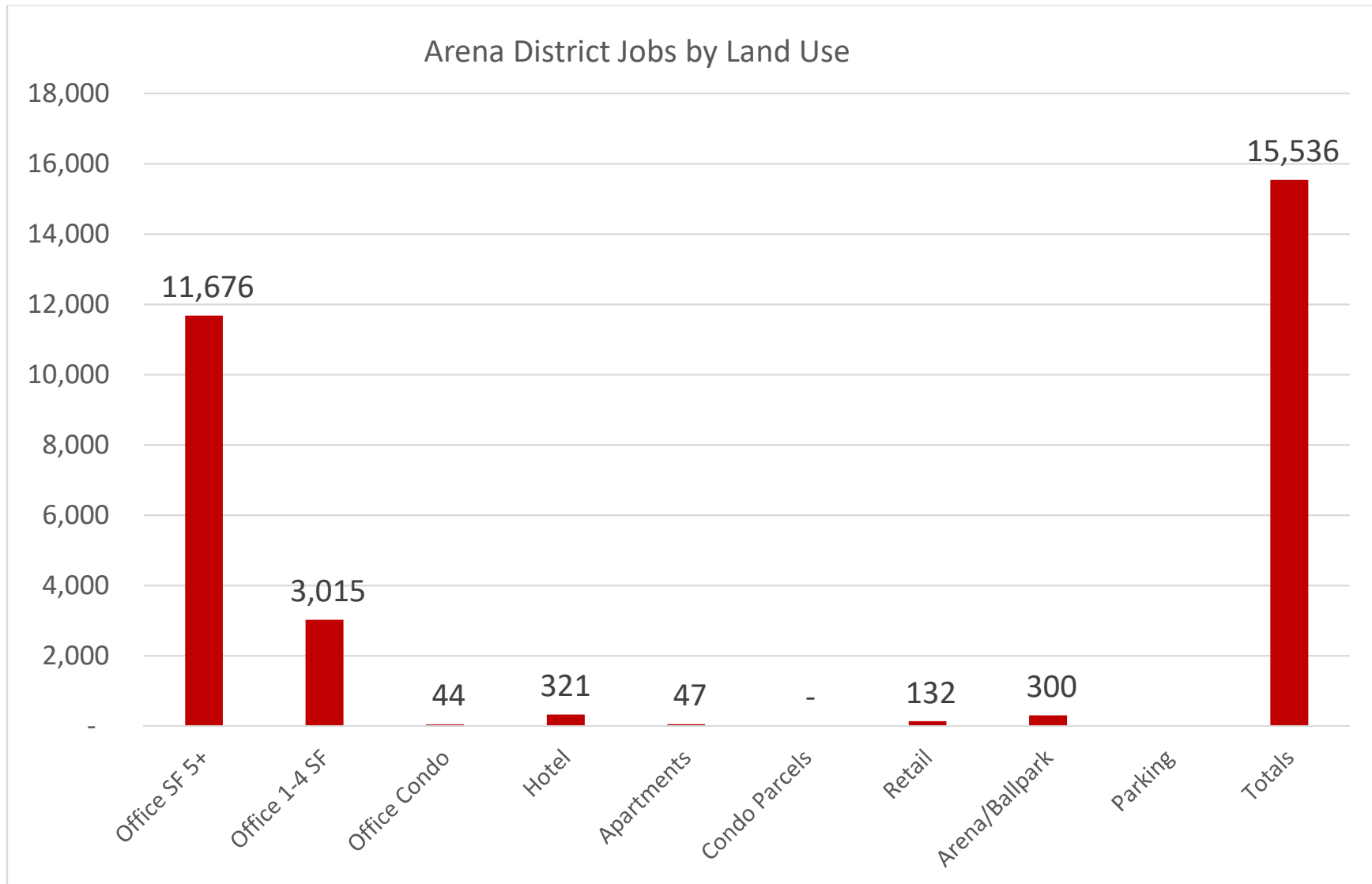
ARENA DISTRICT BASE & MARKET VALUE ¹⁷			Arena District		Columbus (not including Arena District)	
Use Category	Base Market Value	Total Market Value	% Increase	\$ per Acre	% Increase	\$ per Acre
Commercial	\$10,989,000	\$35,517,800	223%	\$550,073	243%	\$386,220
Entertainment	\$1,589,900	\$7,396,400	365%	\$1,545,079	96%	\$510,821
Food & Beverage	\$3,350,200	\$11,689,300	249%	\$4,472,285	51%	\$921,525
Institutional	\$330,000	\$89,373,900	26,983%	\$9,656,500	3,135%	\$714,706
Lodging	\$33,296,900	\$105,346,900	216%	\$44,840,680	83%	\$949,374
Medical	\$307,100	\$39,765,800	12,849%	\$4,001,743	1,249%	\$5,896,499
Office	\$228,562,500	\$782,008,900	242%	\$1,989,888	141%	\$740,443
Parking	\$23,815,400	\$84,449,900	255%	\$9,468,836	1,605%	\$5,265,338
Residential	\$7,192,400	\$371,337,900	5,063%	\$1,368,788	32%	\$452,367
Retail	\$2,597,500	\$9,747,500	275%	\$9,731,929	196%	\$1,180,430
Warehouse	\$15,017,400	\$334,749,500	2,129%	\$21,377,669	67%	\$424,783
Grand Total	\$327,048,300	\$1,871,383,800	472%	\$2,388,883	128%	\$606,477

¹⁷ Table created and calculations made by Vista Site Selection based off of Franklin County Auditor data for Arena District parcels, 2022.



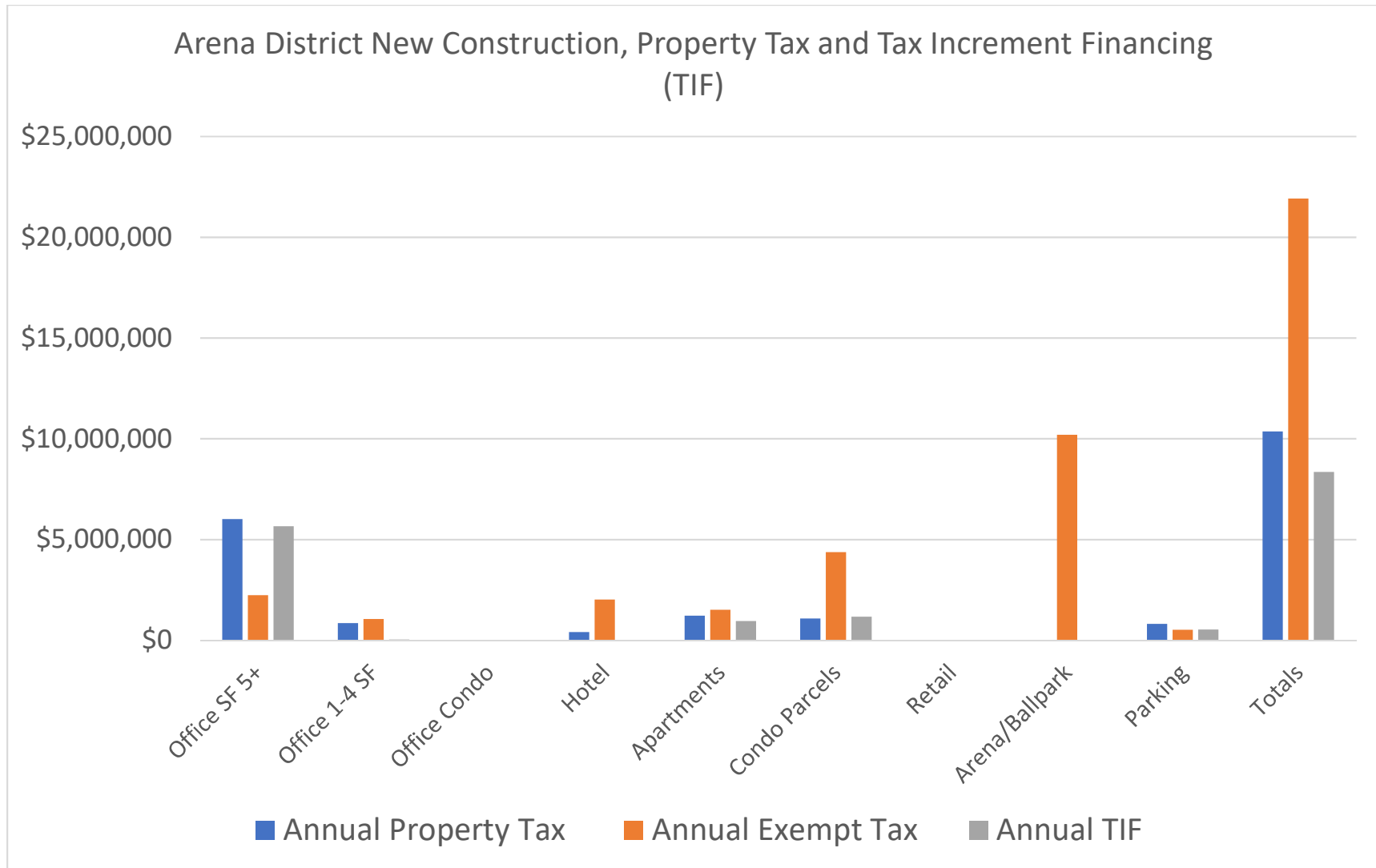
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¹⁸ Franklin County Auditor Data for Arena District Parcels – 2022.



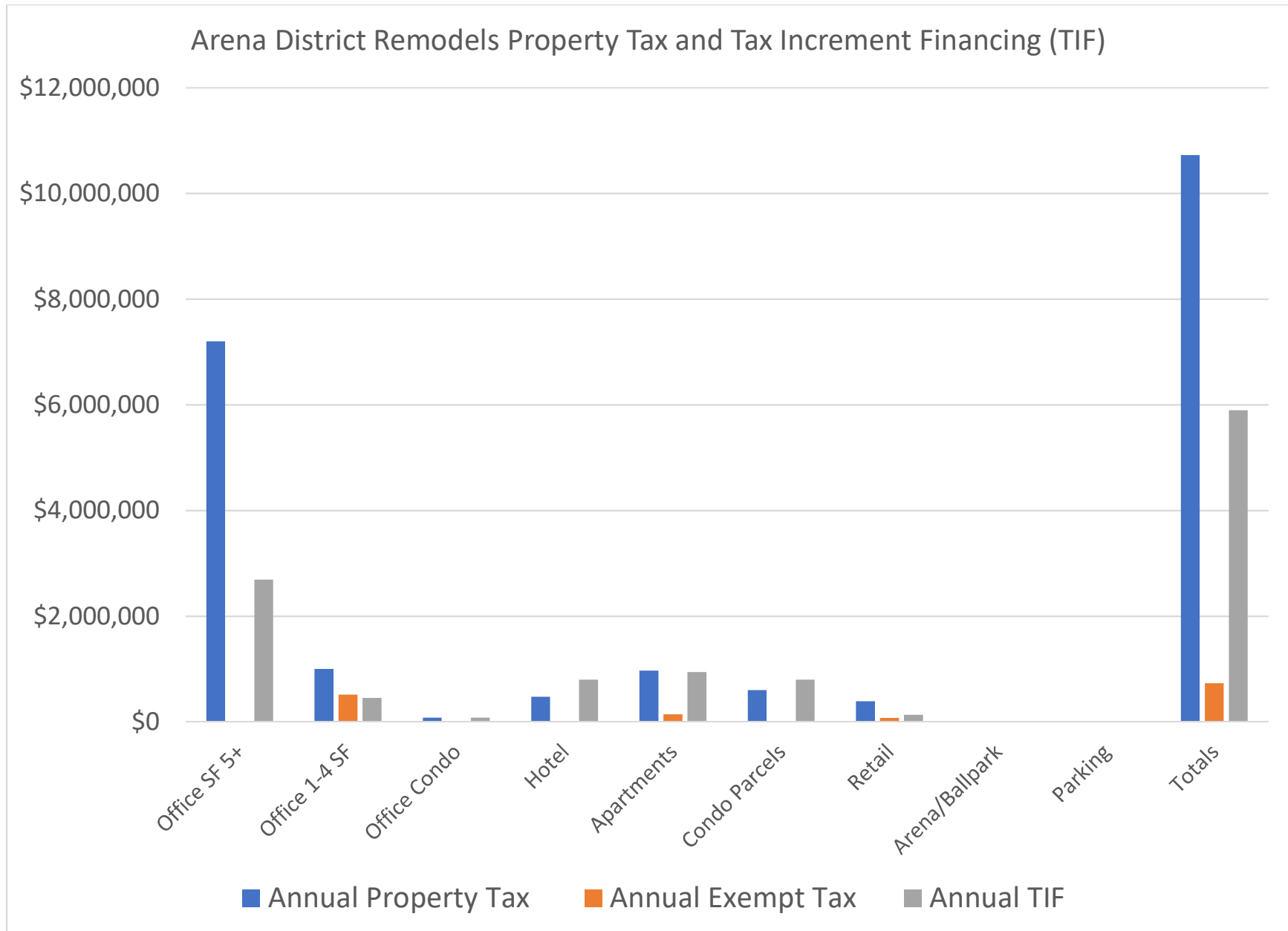
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¹⁹ Franklin County Auditor Data for Arena District Parcels – 2022.



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²⁰ Franklin County Auditor Data for Arena District Parcels – 2022.



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²¹ Franklin County Auditor Data for Arena District Parcels – 2022.

The table below estimates annual sales, payroll and jobs by County Auditor Land Use category, within the Arena District²². Further, each use's property tax contribution, or property tax exemption level, is illustrated along the far right columns by New Construction projects and Remodel projects. While Franklin County Auditor data was used to understand New Construction and Remodel square footage, Annual Sales, Jobs and Payroll was estimated using area employment density averages, sales per square foot averages and wage rates available at the Bureau of Labor statistics for the City of Columbus. Further, a large portion of the Arena District is subject to a Tax Increment Financing (see "Annual TIF") District and some property falls into a Commercial Reinvestment Area tax abatement, Enterprise Zone Tax abatement or is exempt from taxes based on its land use classification (see "Annual Exempt Tax").

	New Construction (sf)	Remodel (sf)	Annual Sales (\$)	Jobs (#)	Payroll (\$)	New Construction (\$)			Remodel (\$)		
						Annual Property Tax	Annual Exempt Tax	Annual TIF	Annual Property Tax	Annual Exempt Tax	Annual TIF
Office SF 5+	2,094,706	824,267	\$0	11,676	\$1,050,830,280	\$6,012,613	\$2,238,905	\$5,650,184	\$7,201,588	\$0	\$2,690,271
Office 1-4 SF	446,716	382,514	\$0	3,015	\$271,384,364	\$847,465	\$1,052,680	\$42,078	\$1,000,176	\$514,987	\$455,386
Office Condo	-	17,563	\$0	44	\$3,512,600	\$0	\$0	\$1	\$80,275	\$0	\$79,867
Hotel	642,274	-	\$86,257,613	321	\$14,451,165	\$399,932	\$2,017,400	\$0	\$477,776	\$0	\$797,283
Apartments	433,749	271,883	\$0	47	\$1,646,475	\$1,214,894	\$1,513,084	\$946,369	\$968,939	\$143,531	\$941,511
Condo Parcels	320	95	\$0	-	\$0	\$1,082,961	\$4,374,532	\$1,171,892	\$602,637		\$797,283
Retail	-	132,175	\$46,261,250	132	\$3,304,375	\$0	\$0	\$1	\$392,474	\$73,920	\$134,226
Arena/Ballpark	630,000	-	\$100,000,000	300	\$10,500,000	\$0	\$10,191,860	\$0			
Parking	1,352,000	-			\$0	\$807,062	\$522,186	\$536,836	\$0	\$0	\$0
Totals	5,599,765	1,628,497	\$232,518,863	15,536	\$1,355,629,258	\$10,364,927	\$21,910,647	\$8,347,362	\$10,723,865	\$732,438	\$5,895,828

²² Table created and calculations made by Vista Site Selection based off of Franklin County Auditor data for Arena District parcels, 2022.

Return on City Incentives Awarded in the Arena District

An additional analysis conducted as illustrated in the table below overviews the Return-on-Investment the City of Columbus receives from the expenditure of City Income Tax Rebates (or Income-tax Based Grants), Property Tax Abatements and Tax Increment Financing Awards, from construction within the District taking place since last year.

It is important to note that subsidies for all Arena District business tenants were not reviewed for purposes of this study, but estimated based on 1) the current Franklin County Auditor value of taxes distributed to Tax Increment Financing funds per parcel (See “TIF”), 2) the current Franklin County Auditor value of taxes exempted per parcel (See “Abatement”) and 3) an assumption that 15% of local income taxes are abated or reimbursed back to Arena District Businesses through income tax incentives (See “Income Tax Incentives”).

Using this analysis, the City receives \$1.75 million in taxes (“Revenues”) in return for every dollar invested in tax incentives. It is important to note this does not factor in any increased surplus the City receives from Arena District Tax Increment Financing Funds, the value of infrastructure built from those funds or any City costs related to bonds issued or fiscal costs related to City Services within the Arena District.

City Revenues	Construction	Ops
City Income Tax	\$13,505,788	\$33,890,731
City Bed Tax	\$0	\$4,399,138
City Property Tax	\$0	\$5,113,657
Total City Revenues	\$13,505,788	\$43,403,527

County Sales Tax	\$7,095,603	\$2,632,246
County Bed Tax	\$0	\$4,226,623
County Property Tax	\$0	\$1,036,493
Total County Revenues	\$7,095,603	\$7,895,362

State Income Tax	\$14,856,366	\$37,279,805
State Sales Tax	\$32,639,774	\$12,108,331
Total	\$47,496,141	\$49,388,136

City Investment	Construction	Ops
Abatement	\$0	\$5,491,615
TIF	\$0	\$14,243,190
Income Tax Incentives	\$0	\$5,083,610
Total	\$0	\$24,818,415

City ROI	\$1.75
City Revenues	\$43,403,527
City Expenses	\$24,818,415

\$1.75
for every
dollar spent (175%
ROI)

Arena District Post-2000 Property Growth Impact to County-wide Sales (Blue Jackets and Arena Events)

Industry Group ²³	Direct Sales Impact	Indirect Sales Impact	Induced Sales Impact	Total Sales Impact
Agriculture	\$0	\$922	\$5,310	\$6,232
Commercial	\$5,860,084,341	\$1,335,399,528	\$147,128,056	\$7,342,611,926
Construction	\$0	\$35,189,044	\$6,836,717	\$42,025,762
Dining	\$30,840,832	\$0	\$0	\$30,840,832
Education	\$0	\$3,117,797	\$17,629,331	\$20,747,128
Energy	\$0	\$726,466	\$1,120,221	\$1,846,687
Entertainment	\$301,678,029	\$525,444,716	\$137,779,398	\$964,902,143
Government	\$0	\$16,258,340	\$13,462,342	\$29,720,682
Manufacturing	\$0	\$10,166,644	\$13,568,722	\$23,735,366
Medical	\$0	\$217,542	\$210,788,903	\$211,006,444
Mining	\$0	\$8,895,697	\$5,118,091	\$14,013,788
Residential	\$247,981,749	\$0	\$1,380,948	\$249,362,697
Retail	\$0	\$81,279,279	\$245,641,266	\$326,920,544
Transportation	\$0	\$32,477,349	\$28,364,671	\$60,842,021
Warehousing	\$0	\$3,652,420	\$8,172,865	\$11,825,285
Wholesale	\$0	\$13,442,140	\$23,388,040	\$36,830,180
Grand Total	\$6,440,584,951	\$2,066,267,883	\$860,384,882	\$9,367,237,716

²³ IMPLAN Economic Modeling Software – Input/Output Model – 2021 Data; Data aggregated by Vista Site Selection

TAX SUMMARY

The table below compares estimated Tax Revenues of growth attributable to Arena Operations, CBJ Operations and Visitor Spending (“Arena-only Growth Impacts”) and Arena District Property Growth since 2000 (“Arena District Growth Impacts”).

	Arena-only Growth Impacts	Arena District Growth Impacts
Economic Impacts		
Full-time & Part-time Jobs	2,754	33,763
Annual Economic Output	\$462 million	\$9.3 billion
*Projected Taxes by Tax Type over Next 30 Years (First-year annual in parenthesis)		
Property Taxes (and TIF)	\$42 million (\$1.2m)	\$1.4 billion (\$28.4m)
Income Taxes	\$418 million (\$9.8m)	\$6.2 billion (\$142m)
Sales Taxes	\$641 million (\$16.1m)	\$993 million (\$24.5m)
Lodging Taxes	\$286 million (\$6.4m)	\$396 million (\$9.2m)
Total	\$1.47 billion	\$8.69 billion
*Projected Taxes by Taxing Unit over Next 30 Years (First-year annual in parenthesis)		
Columbus (including TIF)	\$248 million (\$5.8m)	\$2.5 billion (\$59.3m)
Additional to all County Cities	\$105 million (\$1.9m)	\$1.1 billion (\$24.5m)
School Districts	\$31 million (\$1.1)	\$480 million (\$13.7m)
Transit Authority	\$42 million (\$1.0m)	\$66 million (\$1.6m)
Franklin County	\$236 million (\$5.8m)	\$445 million (\$11.3m)
Ohio	\$632 million (\$15.3m)	\$4.1 billion (\$94.1m)

Detailed Arena Operations & Visitor Spending Tax Summary Based on Current Footprint (assumes no new growth) 30-year Projections and 10-year Annualized Projections²⁴

	30-Year Summary	Year 1	Year 2	Year 3	Year 4	Year 5	Year 6	Year 7	Year 8	Year 9	Year 10
PROPERTY TAXES											
Countywide Indirect Property Taxes	\$42,080,501	\$1,209,735	\$1,221,832	\$1,234,051	\$1,246,391	\$1,258,855	\$1,271,444	\$1,284,158	\$1,297,000	\$1,309,970	\$1,323,069
County	\$6,312,075	\$181,460	\$183,275	\$185,108	\$186,959	\$188,828	\$190,717	\$192,624	\$194,550	\$196,495	\$198,460
School Districts in County	\$31,560,376	\$907,301	\$916,374	\$925,538	\$934,793	\$944,141	\$953,583	\$963,119	\$972,750	\$982,477	\$992,302
Cities in County	\$4,208,050	\$120,974	\$122,183	\$123,405	\$124,639	\$125,886	\$127,144	\$128,416	\$129,700	\$130,997	\$132,307
INCOME TAXES											
Operations Base	\$3,473,562,118	\$79,119,550	\$81,097,539	\$83,124,977	\$85,203,102	\$87,333,179	\$89,516,509	\$91,754,421	\$94,048,282	\$96,399,489	\$98,809,476
Visitor Activity	\$1,553,130,959	\$35,376,659	\$36,261,075	\$37,167,602	\$38,096,792	\$39,049,212	\$40,025,443	\$41,026,079	\$42,051,731	\$43,103,024	\$44,180,599
Ohio Withholdings Tax	\$140,747,406	\$3,205,894	\$3,286,041	\$3,368,192	\$3,452,397	\$3,538,707	\$3,627,175	\$3,717,854	\$3,810,800	\$3,906,070	\$4,003,722
Countywide Indirect Taxes	\$80,354,816	\$1,830,293	\$1,876,050	\$1,922,952	\$1,971,026	\$2,020,301	\$2,070,809	\$2,122,579	\$2,175,643	\$2,230,034	\$2,285,785
Columbus Income Tax	\$125,667,327	\$2,862,405	\$2,933,965	\$3,007,314	\$3,082,497	\$3,159,560	\$3,238,549	\$3,319,512	\$3,402,500	\$3,487,563	\$3,574,752
Countywide Indirect Taxes	\$71,745,372	\$1,634,190	\$1,675,045	\$1,716,921	\$1,759,844	\$1,803,840	\$1,848,936	\$1,895,160	\$1,942,539	\$1,991,102	\$2,040,880
SALES TAXES											
Visitor Activity	\$4,748,341,170	\$117,046,241	\$119,387,166	\$121,774,909	\$124,210,407	\$126,694,615	\$129,228,508	\$131,813,078	\$134,449,339	\$137,138,326	\$139,881,093
Ohio Sales Tax	\$273,029,617	\$6,730,159	\$6,864,762	\$7,002,057	\$7,142,098	\$7,284,940	\$7,430,639	\$7,579,252	\$7,730,837	\$7,885,454	\$8,043,163
Countywide Indirect Taxes	\$219,092,346	\$5,400,609	\$5,508,621	\$5,618,794	\$5,731,170	\$5,845,793	\$5,962,709	\$6,081,963	\$6,203,602	\$6,327,675	\$6,454,228
County Sales Tax	\$59,354,265	\$1,463,078	\$1,492,340	\$1,522,186	\$1,552,630	\$1,583,683	\$1,615,356	\$1,647,663	\$1,680,617	\$1,714,229	\$1,748,514
Countywide Indirect Taxes	\$47,628,771	\$1,174,046	\$1,197,526	\$1,221,477	\$1,245,906	\$1,270,825	\$1,296,241	\$1,322,166	\$1,348,609	\$1,375,581	\$1,403,093
COTA Sales Tax	\$23,741,706	\$585,231	\$596,936	\$608,875	\$621,052	\$633,473	\$646,143	\$659,065	\$672,247	\$685,692	\$699,405
Countywide Indirect Taxes	\$19,051,508	\$469,618	\$479,011	\$488,591	\$498,363	\$508,330	\$518,496	\$528,866	\$539,444	\$550,233	\$561,237
LODGING TAXES											
Visitor Activity	\$2,402,400,615	\$59,218,988	\$60,403,368	\$61,611,436	\$62,843,664	\$64,100,538	\$65,382,548	\$66,690,199	\$68,024,003	\$69,384,483	\$70,772,173
County Lodging Tax	\$117,717,630	\$2,901,730	\$2,959,765	\$3,018,960	\$3,079,340	\$3,140,926	\$3,203,745	\$3,267,820	\$3,333,176	\$3,399,840	\$3,467,836
Countywide Indirect Taxes	\$11,742,192	\$272,678	\$295,665	\$301,578	\$307,610	\$313,762	\$320,038	\$326,438	\$332,967	\$339,626	\$346,419
City of Columbus Lodging Tax	\$122,522,431	\$3,020,168	\$3,080,572	\$3,142,183	\$3,205,027	\$3,269,127	\$3,334,510	\$3,401,200	\$3,469,224	\$3,538,609	\$3,609,381
Countywide Indirect Taxes	\$34,799,737	\$283,808	\$307,733	\$333,675	\$361,804	\$392,304	\$425,375	\$461,234	\$500,116	\$542,276	\$587,990
Taxes by Selected Units of Government											
Impact to City of Columbus	\$248,189,758	\$5,882,574	\$6,014,537	\$6,149,498	\$6,287,524	\$6,428,687	\$6,573,059	\$6,720,713	\$6,871,724	\$7,026,171	\$7,184,133
Additional Impact Shared by all FC Cities	\$106,545,109	\$1,917,998	\$1,982,778	\$2,050,596	\$2,121,648	\$2,196,144	\$2,274,311	\$2,356,394	\$2,442,655	\$2,533,378	\$2,628,870
Impact to County School Districts	\$31,560,376	\$907,301	\$916,374	\$925,538	\$934,793	\$944,141	\$953,583	\$963,119	\$972,750	\$982,477	\$992,302
Impact to County Taxes	\$236,442,857	\$5,811,532	\$5,945,296	\$6,064,202	\$6,185,486	\$6,309,196	\$6,435,380	\$6,564,087	\$6,695,369	\$6,829,277	\$6,965,862
Impact to State Taxes	\$632,869,369	\$15,336,662	\$15,659,425	\$15,989,043	\$16,325,665	\$16,669,441	\$17,020,523	\$17,379,069	\$17,745,240	\$18,119,199	\$18,501,113

²⁴ Calculations made by Vista Site Selection – tax rates from the following sources: Sales Tax – Ohio Department of Taxation The Finder; Property Tax – Franklin County Auditor; Income Tax – Ohio Department of Taxation The Finder; Lodging Tax – City of Columbus. All rates are 2022 Rates. Indirect Taxes calculated using IMPLAN tax calculation software.

Detailed Arena District Post-2000 Development Tax Summary Based on Current Footprint (assumes no new growth) 30-year Projections and 10-year Annualized Projections²⁵

	30-Year Summary	Year 1	Year 2	Year 3	Year 4	Year 5	Year 6	Year 7	Year 8	Year 9	Year 10
PROPERTY TAXES											
Property Taxes Total	\$414,686,433	\$10,364,927	\$12,087,199	\$12,208,071	\$12,330,152	\$12,453,454	\$12,577,988	\$12,703,768	\$12,830,806	\$12,959,114	\$13,088,705
County	\$2,446,702	\$61,154	\$71,316	\$72,029	\$72,749	\$73,477	\$74,212	\$74,954	\$75,703	\$76,460	\$77,225
Columbus State	\$68,340	\$1,708	\$1,992	\$2,012	\$2,032	\$2,052	\$2,073	\$2,094	\$2,115	\$2,136	\$2,157
School District	\$7,594,031	\$189,810	\$221,349	\$223,563	\$225,798	\$228,056	\$230,337	\$232,640	\$234,967	\$237,316	\$239,690
School District (TIF)	\$281,202,565	\$7,028,549	\$8,196,438	\$8,278,402	\$8,361,186	\$8,444,798	\$8,529,246	\$8,614,538	\$8,700,684	\$8,787,691	\$8,875,567
City/Village	\$456,575	\$11,412	\$13,308	\$13,441	\$13,576	\$13,711	\$13,849	\$13,987	\$14,127	\$14,268	\$14,411
City/Village (TIF)	\$122,579,508	\$3,063,827	\$3,572,924	\$3,608,653	\$3,644,739	\$3,681,187	\$3,717,999	\$3,755,179	\$3,792,730	\$3,830,658	\$3,868,964
Library	\$338,711	\$8,466	\$9,873	\$9,971	\$10,071	\$10,172	\$10,274	\$10,376	\$10,480	\$10,585	\$10,691
Countywide Indirect Property Taxes	\$630,273,829	\$18,119,183	\$18,300,375	\$18,483,379	\$18,668,213	\$18,854,895	\$19,043,444	\$19,233,878	\$19,426,217	\$19,620,479	\$19,816,684
County	\$94,541,074	\$2,717,878	\$2,745,056	\$2,772,507	\$2,800,232	\$2,828,234	\$2,856,517	\$2,885,082	\$2,913,933	\$2,943,072	\$2,972,503
School Districts in County	\$472,705,372	\$13,589,388	\$13,725,281	\$13,862,534	\$14,001,160	\$14,141,171	\$14,282,583	\$14,425,409	\$14,569,663	\$14,715,359	\$14,862,513
Cities in County	\$63,027,383	\$1,811,918	\$1,830,038	\$1,848,338	\$1,866,821	\$1,885,489	\$1,904,344	\$1,923,388	\$1,942,622	\$1,962,048	\$1,981,668
INCOME TAXES											
Operations Base	\$3,473,562,118	\$79,119,550	\$81,097,539	\$83,124,977	\$85,203,102	\$87,333,179	\$89,516,509	\$91,754,421	\$94,048,282	\$96,399,489	\$98,809,476
Visitor Activity	\$1,553,130,959	\$35,376,659	\$36,261,075	\$37,167,602	\$38,096,792	\$39,049,212	\$40,025,443	\$41,026,079	\$42,051,731	\$43,103,024	\$44,180,599
Ohio Withholdings Tax	\$2,203,312,357	\$50,186,257	\$51,440,914	\$52,726,937	\$54,045,110	\$55,396,238	\$56,781,144	\$58,200,672	\$59,655,689	\$61,147,081	\$62,675,758
Countywide Indirect Taxes	\$1,103,194,734	\$25,128,173	\$25,756,378	\$26,400,287	\$27,060,294	\$27,736,802	\$28,430,222	\$29,140,977	\$29,869,502	\$30,616,239	\$31,381,645
Columbus Income Tax	\$1,967,243,176	\$44,809,158	\$45,929,387	\$47,077,622	\$48,254,562	\$49,460,927	\$50,697,450	\$51,964,886	\$53,264,008	\$54,595,608	\$55,960,499
Countywide Indirect Taxes	\$984,995,298	\$22,435,869	\$22,996,766	\$23,571,685	\$24,160,977	\$24,765,001	\$25,384,126	\$26,018,730	\$26,669,198	\$27,335,928	\$28,019,326
SALES TAXES											
Visitor Activity	\$4,748,341,170	\$117,046,241	\$119,387,166	\$121,774,909	\$124,210,407	\$126,694,615	\$129,228,508	\$131,813,078	\$134,449,339	\$137,138,326	\$139,881,093
Ohio Sales Tax	\$542,388,510	\$13,369,835	\$13,637,231	\$13,909,976	\$14,188,175	\$14,471,939	\$14,761,378	\$15,056,605	\$15,357,737	\$15,664,892	\$15,978,190
Countywide Indirect Taxes	\$219,092,346	\$5,400,609	\$5,508,621	\$5,618,794	\$5,731,170	\$5,845,793	\$5,962,709	\$6,081,963	\$6,203,602	\$6,327,675	\$6,454,228
County Sales Tax	\$117,910,546	\$2,906,486	\$2,964,616	\$3,023,908	\$3,084,386	\$3,146,074	\$3,208,995	\$3,273,175	\$3,338,639	\$3,405,411	\$3,473,520
Countywide Indirect Taxes	\$47,628,771	\$1,174,046	\$1,197,526	\$1,221,477	\$1,245,906	\$1,270,825	\$1,296,241	\$1,322,166	\$1,348,609	\$1,375,581	\$1,403,093
COTA Sales Tax	\$47,164,218	\$1,162,594	\$1,185,846	\$1,209,563	\$1,233,754	\$1,258,429	\$1,283,598	\$1,309,270	\$1,335,455	\$1,362,165	\$1,389,408
Countywide Indirect Taxes	\$19,051,508	\$469,618	\$479,011	\$488,591	\$498,363	\$508,330	\$518,496	\$528,866	\$539,444	\$550,233	\$561,237
LODGING TAXES											
Visitor Activity	\$2,402,400,615	\$59,218,988	\$60,403,368	\$61,611,436	\$62,843,664	\$64,100,538	\$65,382,548	\$66,690,199	\$68,024,003	\$69,384,483	\$70,772,173
County Lodging Tax	\$171,465,978	\$4,226,623	\$4,311,156	\$4,397,379	\$4,485,326	\$4,575,033	\$4,666,533	\$4,759,864	\$4,855,061	\$4,952,163	\$5,051,206
Countywide Indirect Taxes	\$11,742,192	\$272,678	\$295,665	\$301,578	\$307,610	\$313,762	\$320,038	\$326,438	\$332,967	\$339,626	\$346,419
City of Columbus Lodging Tax	\$178,464,590	\$4,399,138	\$4,487,121	\$4,576,863	\$4,668,401	\$4,761,769	\$4,857,004	\$4,954,144	\$5,053,227	\$5,154,292	\$5,257,377
Countywide Indirect Taxes	\$34,799,737	\$283,808	\$307,733	\$333,675	\$361,804	\$392,304	\$425,375	\$461,234	\$500,116	\$542,276	\$587,990
Taxes by Selected Units of Government											
Impact to City of Columbus (includes TIF)	\$2,549,946,415	\$59,312,085	\$62,199,178	\$63,554,982	\$64,942,464	\$66,362,391	\$67,815,547	\$69,302,734	\$70,824,776	\$72,382,516	\$73,976,819
Additional Impact Shared by all FC Cities	\$1,082,822,418	\$24,531,595	\$25,134,536	\$25,753,698	\$26,389,602	\$27,042,795	\$27,713,846	\$28,403,352	\$29,111,936	\$29,840,252	\$30,588,984
Impact to County School Districts	\$480,299,403	\$13,779,197	\$13,946,631	\$14,086,097	\$14,226,958	\$14,369,228	\$14,512,920	\$14,658,049	\$14,804,630	\$14,952,676	\$15,102,203
Impact to County Taxes	\$445,735,263	\$11,358,865	\$11,585,335	\$11,788,878	\$11,996,210	\$12,207,404	\$12,422,535	\$12,641,679	\$12,864,912	\$13,092,314	\$13,323,965
Impact to State Taxes	\$4,067,987,947	\$94,084,875	\$96,343,144	\$98,655,994	\$101,024,750	\$103,450,772	\$105,935,452	\$108,480,218	\$111,086,531	\$113,755,887	\$116,489,822

²⁵ Calculations made by Vista Site Selection – tax rates from the following sources: Sales Tax – Ohio Department of Taxation The Finder; Property Tax – Franklin County Auditor; Income Tax – Ohio Department of Taxation The Finder; Lodging Tax – City of Columbus. All rates are 2022 Rates. Indirect Taxes calculated using IMPLAN tax calculation software.

Rates of Taxation

Tax Rates	
PROPERTY	
Property Value Increase	1.00%
Assessment Rate	35.00%
Property Tax Rate & Distributions (Arena District)	7.50%
County	0.59%
Columbus State	0.02%
School District	1.83%
School District (TIF)	67.81%
Township	0.00%
Township (TIF)	0.00%
Park District	0.00%
Vocational School	0.00%
Vocational School (TIF)	0.00%
City/Village	0.11%
City/Village (TIF)	29.56%
Library	0.08%
Indirect & Induced Property Tax Distribution (Non Arena District)	
County Property	15.00%
City Property	10.00%
School Property	75.00%
INCOME	
Ohio Withholdings Tax	2.80%
Columbus Income Tax	2.50%
SALES	
Ohio Sales Tax	5.75%
County Sales Tax	1.25%
COTA	0.50%
LODGING	
Franklin County Lodging Tax	4.90%
Columbus Lodging Tax	5.10%
The Columbus Convention and Visitors Bureau (Promoting the City)	46.86%
Cultural Services / Community Enrichment	32.94%
Emergency Human Services fund of the City	11.77%
Affordable Housing Trust	8.43%

Rates and Assumptions			
GROWTH RATES			
	Sales	2.00%	
	Property	1.00%	
	Wages	2.50%	
	Prices	2.00%	
Stay Visitor per Day			
		\$204	\$ per
	Lodging	41.61%	\$85.00
	F&B	28.58%	\$58.38
	Retail	14.50%	\$29.63
	Entertainment	6.40%	\$13.07
	Transportation	8.92%	\$18.22
Drive Visitor per Day			
		\$75.00	\$ per
	Lodging	0.00%	\$0.00
	F&B	63.82%	\$47.87
	Retail	18.23%	\$13.68
	Entertainment	9.12%	\$6.84
	Transportation	8.83%	\$6.62

Community and Other Impacts

Nationwide Arena and the Columbus Blue Jackets have contributed to the community in numerous ways beyond its economic impacts. The following cover some of the various ways in which the Arena serves the community:

- **A far-reaching community partner.** The Columbus Blue Jackets Foundation (“CBF”) contributes to over 950 community organizations and more than \$12.2 million to organizations serving the community since 2000.
- **Driving STEM education.** The CBF have provided free education resources to over 85,000 students addressing literacy, STEM, academic achievements and physical activity, including 2,460,624 minutes in reading programming through Ohio’s 529 Plan, CollegeAdvantage incentive and 20,200 hours of STEM education through the Hockey Scholars online curriculum, which uses hockey-themed STEM lessons for 4-8 grade students.
- **Supporting educational infrastructure.** The CBF has donated \$363,000 in equipment, supplies and field trips to schools and community centers and awards two \$10,000 scholarships annually.
- **Combating cancer driving health and wellness.** The CBF raised \$78,000 during its Hockey Fights Cancer program to provide care for 9,200 pediatric cancer patients and provided 5,000 square feet of space at Nationwide Children’s Hospital for families receiving hospital care by offering a lounge with play area, laundry facilities, a clinical education classroom, computers and complimentary services including haircuts and massage therapy.
- **Creating opportunity for disadvantaged and underprivileged populations.** The CBF has provided hockey programs to assist 5,200 children in diverse and disadvantaged communities, 121 athletes with physical disabilities to play sled hockey and 185 families participating in Special Hockey for individuals with developmental disabilities.
- **Advancing the entertainment industry by incubating the nation’s top performing acts.** Nationwide Arena has become a musical incubator of sorts, helping countless artists grow from opening acts to headlining acts. For instance, Kane Brown has grown from opening act to arena headliner. Chris Stapleton has grown from playing arena shows to playing at Ohio Stadium. It's not just big-name acts that benefit from the venue, either. Columbus-based bands like Twenty-One Pilots and CAAMP have also been able to grow as live artists thanks to Nationwide Arena's support.