



# PHASE ONE OF A FEASIBILITY STUDY FOR POTENTIAL NEW MULTI-USE SPORTS FACILITIES IN EUGENE-SPRINGFIELD, OREGON

October 7, 2016



CONVENTIONS  
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October 7, 2016

Mr. Neil Bjorklund  
Parks and Open Space Planning Manager  
Eugene Parks and Open Space Division  
1820 Roosevelt Boulevard  
Eugene, Oregon 97402

Dear Mr. Bjorklund:

Conventions, Sports & Leisure International (CSL) is pleased to present this report related to Phase One findings of a feasibility study of new multi-use sports facilities in Eugene and Springfield, Oregon. The overall study involves the analysis of the market, programmatic, financial and economic feasibility of new multi-use sports facilities in Eugene and Springfield for the purpose of driving new revenue and economic impact to the area, as well as enhancing rental, practice and other special event facility alternatives available for residents. Phase One of the potential two-phased study focuses on analysis of market demand and supportable programmatic aspects of the project. The attached report presents our research, analysis and findings and is intended to assist the Eugene Parks and Open Spaces Division, Travel Lane County, Willamalane Parks and Rec District and other stakeholders in evaluating the viability of sports and recreation facility development and operation.

The analysis presented in this report is based on estimates, assumptions and other information developed from industry research, data provided by the study's stakeholders, surveys of potential facility users and local representatives, discussions with industry participants and analysis of competitive/comparable facilities and communities. The sources of information, the methods employed, and the basis of significant estimates and assumptions are stated in this report. Some assumptions inevitably will not materialize and unanticipated events and circumstances may occur. Therefore, actual results achieved will vary from those described and the variations may be material.

The findings presented herein are based on analysis of present and near-term conditions in Eugene and Springfield as well as existing interest levels by the potential base of users of new/enhanced facilities. Any significant future changes in the characteristics of the local community, such as growth in population, corporate inventory, competitive inventory and visitor amenities/attractions, could materially impact the key market conclusions developed as a part of this study. As in all studies of this type, the estimated results are based on competent and efficient management of the potential Facilities and assume that no significant changes in the demand markets or assumed immediate and local area market conditions will occur beyond those set forth in this report. Furthermore, all information provided to us by others was not audited or verified and was assumed to be correct.

This report has been prepared for the internal use of the Eugene Parks and Open Space Division, Travel Lane County, and Willamalane Parks and Rec District, and should not be relied upon by any other party. The report has been structured to assist stakeholders in evaluating market demand, supportable program and the potential cost/benefit characteristics of a potential amateur sports and recreation facility development in Eugene-Springfield and should not be used for any other purpose.

We sincerely appreciate the assistance and cooperation we have been provided in the compilation of this report and would be pleased to be of further assistance in the interpretation and application of our findings.

Very truly yours,

CSL International

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# EXECUTIVE SUMMARY

Conventions, Sports and Leisure International (CSL) was engaged by the City of Eugene (City) to study the feasibility of new multi-use sports facilities in Eugene and Springfield, Oregon. The contracted study involves the analysis of the market, programmatic, financial and economic feasibility of new multi-use sports facilities in Eugene and Springfield. The full written report should be reviewed in its entirety to gain an understanding of the study's methods, limitations and implications.

## Introduction

The attached report outlines the key findings associated with Phase One of a potential two-phased study. Phase One focuses on analysis of market demand and supportable programmatic aspects of the project. This report presents our research, analysis and findings and is intended to assist the Eugene Parks and Open Space Division, Travel Lane County, and other stakeholders in evaluating the viability of sports and recreation facility development and operation.

Specifically, the envisioned facility products would serve to: (1) provide a public resource for local residents (by accommodating local sports and recreation activities); (2) enhance the ability to drive additional revenue for City sports and recreation programs and facilities; and (3) generate new economic impact (through attracting tournaments, competitions, and meets with non-local participants and attendees). Facility product concepts considered through this study included an outdoor field complex, a flexible flat floor indoor facility, a natatorium/aquatic center, an indoor track facility, and other such facilities.

## Market Demand

### 1. Market opportunity and synergy associated with a consolidated complex.

While a number of sports and recreation facilities, pools and fields exist throughout Eugene and Springfield, the area is lacking a significant concentration of such facilities in a single location. Many communities have seen that developing a new multi-use sports complex benefits the local sports market by consolidating activities and facilities at one single site, and such developments have assisted in recreational activity participation growth in a given area. Specifically, the area lacks a facility with more than six triangle (baseball/softball) or rectangle (soccer/lacrosse/football) fields, representing a possible need area that may be preventing the community from developing more thriving league, club sport, and tournament participation and activity. With regard to indoor sports, facilities such as Willamalane Center for Sports and Recreation and the Sports Center at Lane County Fairgrounds accommodate a steady amount of basketball, volleyball and other activity throughout the year; however, the Willamalane Center's operating mandate requires minimum rental payments to reserve space, and the facilities at the Lane County Fairgrounds are aging and substandard relative to the state-of-the-industry. Additionally, Willamalane's indoor courts' relatively high occupancy levels may also indicate the need for an eventual expansion of its indoor space. Further, while local schools accommodate a significant amount of indoor gym-space demand, reliable access to these venues is becoming increasingly challenging due to shrinking school budgets and booking priorities that reserve gym space for school-related functions first.

Moreover, any envisioned Eugene-Springfield recreational and amateur sports facilities designed with state-of-the-industry quality and volume standards would allow the area to be a much more marketable

tournament/competition destination, as the two most important facility attributes for most tournaments are high quality facilities and a critical mass of courts/fields in a single location.

## 2. High demand for an outdoor field complex.

The results of the market demand analysis conducted for this study suggest that high quality baseball/softball and soccer/multisport fields represent the greatest areas of market need in the Eugene-Springfield area. A single, high quality complex could be designed to deliver these fields to generate sustainable revenues, satisfy unmet local needs, allow for the growth of local sports and recreation programming, and generate incremental economic impact through the attraction of new non-local tournaments.

## 3. Unmet demand for indoor court space.

Another area of need exists for indoor basketball/volleyball court space. Emerald KIDSPORTS services the entire 4J School District, utilizing local gym space within various elementary and middle schools. However, school programming takes priority over outside group usage, which occasionally results in KIDSPORTS being bumped with little or no notice from previously scheduled games. This, combined with the number of kids that Emerald KIDSPORTS has to turn away on an annual basis has resulted in their efforts to pursue a 44,000-square foot indoor fieldhouse, with four basketball courts that could be converted into up to 12 volleyball courts. While demand for indoor multipurpose courts throughout the Eugene-Springfield market among other organizations appears to be accommodated by the various high schools and middle schools, it will be important moving forward to pursue consistent facility access to recreational programs such as KIDSPORTS, without directly competing against the Willamalane Center for Sports and Recreation.

## 4. Unmet swimming demand, but potential high costs relative to benefits suggests lower prioritization.

The area also presently has limited facility options for swimming. There are vocal groups in the local area that have indicated strong interest in a new natatorium facility, and the research suggests that interest in swimming programs may grow materially over time should a new facility be developed. However, in terms of satisfying the secondary objectives of this potential project—specifically, the need for a facility investment that works to maximize return-on-investment (number of new local and non-local participants served plus economic impact versus potential construction and operating costs)—a natatorium project would be lower on the list in terms of investment priority (relative to an outdoor complex and indoor court facility).

## 5. Strong community orientation in track & field, but new project would be best led by University.

There appears to be sufficient supply of outdoor tracks throughout the Eugene-Springfield market to accommodate existing demand for local practices and competitions. However, there could be an opportunity to better meet state and regional market demand, as well as compete for certain national meets with the development of an indoor track facility. Eugene has a very strong orientation in the track and field community and marketplace, in terms of programs, participation, and industry/corporate presence. Eugene is widely referred to as “Track Town, USA” throughout the track and field community and beyond. The University of Oregon and local high schools have sophisticated programs and quality outdoor facilities. However, unless there is interest by the University in some type of partnership, this could be best served to be considered a secondary priority, as associated construction and operating costs,

economic impact limitations, and niche orientation of such a facility suggest a lower return-on-investment project (in terms of unmet market demand and benefit-to-costs).

## Facility Program Recommendations

It is estimated that a multi-use sports complex in Eugene or Springfield with baseball, softball, soccer, lacrosse and rugby fields would best meet the needs of the local and regional community. It is recommended that the complex focus on the delivery of quality outdoor fields at a single location as an initial strategy, with planning considerations for future field expansion and/or indoor sports and recreation facility development at the selected site. An analysis of site/location issues would be performed under Phase Two of this study. Additional demand was noted for other types of sports facilities that could be realized through expansion of existing facilities and/or partnerships.

### 1. Core Complex

Understanding that the goals of the proposed multi-use sports complex are to meet the needs of local citizens, drive new revenues, and generate economic impact through new visitation and associated spending, a building program recommendation has been developed consisting of ten to twelve triangle fields (i.e., baseball and softball) and four to six rectangle fields (i.e., soccer, lacrosse, rugby, field hockey, and football). Specifically:

- Rectangle fields = 4 to 6 multi-sport fields:
  - synthetic turf.
  - 345' x 210' per field.
  - no fixed seating required.
- Triangle fields = 10 to 12 baseball/softball fields:
  - 2 baseball fields with adjustable base lengths (including 60', 65', 70', 80' and 90' bases) and fences (up to 320' fences with available portable fencing), synthetic turf, and seating for 500 to 600 spectators at each field.
  - 4 to 6 softball/youth baseball fields utilizing a wheel configuration with portable mounds available and adjustable base lengths (including 60', 65', 70' and 80' bases) and fences (200 to 300' fences with available portable fencing), synthetic turf, portable mounds and seating for 500 to 600 spectators at least two of the fields.
  - 4 to 6 flexible youth baseball fields with synthetic turf infields and grass outfields (or alternately all synthetic) with adjustable base lengths (including 60', 65', 70' and 80' bases) and fences (275'-280' fences with available portable fencing).
- Additional characteristics/amenities:
  - Lighting for all fields to maximize utilization periods.
  - Restroom and concession facilities.
  - Pavilion and field operations building.
  - Warm-up areas.
  - Park entrance signage.
  - Paved parking lot, parking capacity for minimum of 75 spaces per field.

- Option to program a 400-meter track encircling one multisport field (plus bleacher seating).
- Site acreage requirements:
  - Minimum requirements:
    - Rectangle = 1.7 to 2.1 acres per field (195 to 225' x 330' to 360' with minimum 10' clearance on all sides).
    - Triangle = 1.2 acres (little league), 3.8 to 3.85 acres minimum (official).
  - Based on a review of state-of-the-industry complex developments, actual per field acreage deployment (including parking, circulation, support facilities, etc.):
    - Rectangle = 4.5 to 5.0 acres per field.
    - Triangle = 6.0 to 6.5 acres per field.
  - Estimated Eugene-Springfield Core Complex site requirements = 75 to 100 acres.

## 2. Other Facilities

Beyond the outdoor-oriented field complex, the market analysis indicated that unmet local and non-local demand exists for additional indoor facilities. While these facilities could be developed at the site of the outdoor complex, there may be opportunities to expand existing facility product elsewhere and/or involve other partners to more efficiently and successfully achieve their development.

### *Additional Courts*

- There are indications of unmet demand in certain peak time periods for indoor court space (for volleyball and basketball uses, most prominently). It is estimated that there is demand for additional courts in the Eugene-Springfield market, largely to accommodate unmet local demand. These courts should involve a multi-court facility scenario and should meet a minimum number of courts in one facility to achieve optimal marketing and operational efficiencies.
- It is believed that two logical opportunities exist for development to better match market demand. The first would involve an expansion of the Willamalane Center for Sports and Recreation to integrate a minimum of two additional hardwood court (to bring its total number of full sized courts to eight). Additional hardwood courts would require approximately 7,000 square feet per court (not including support space). It is believed that expansion of the Willamalane Center would represent a logical opportunity to leverage a prominent existing sports/rec facility product and would bring court supply into better alignment with local demand.
- The second opportunity involves supporting the 44,000-square foot fieldhouse, proposed by KIDSPORTS, that would offer up to four basketball courts (that could be converted to as many as 12 volleyball courts).
- While there are advantages to both court development scenarios, the Willamalane Center expansion scenario would represent the preferred scenario if only one of the two projects are pursued, as it best leverages existing product/investment and would result in a larger single facility of court offerings. However, there are market indications that both

developments could individually serve important segments of unmet local market demand in the Eugene-Springfield community.

### *Indoor Track Facility*

- Eugene has a very strong orientation in the track and field community and marketplace, in terms of programs, participation, and industry/corporate presence. Eugene is widely referred to as “Track Town, USA” throughout the track and field community and beyond. The University of Oregon and local high schools have sophisticated programs and quality outdoor facilities. However, the local area does not presently offer a high quality indoor track facility to complement its outdoor facilities.
- A state-of-the-industry indoor track facility that would be believed to be appropriate for the Eugene-Springfield market would consist of an indoor facility housing a 200-meter banked Mondo track with six lanes and areas for the high jump, long/triple jump, pole vault, and a 55/60 meter dash runway on the infield. When not being utilized for track and field-oriented activities, the infield could also be developed to integrate four court surfaces to accommodate basketball and volleyball uses, as well as flex space to utilize during inclement weather or as warm-up space.
- A logical partner (in terms of use, funding, and brand) would be the University of Oregon, with a facility development that would be located at or near Hayward Field. Should there be interest by the University in partnering on a project like this, an agreement could be crafted to protect availability for non-University uses.
- There may be an opportunity to develop a stand-alone indoor track facility elsewhere in Eugene-Springfield without major University funding involvement; however, a number of funding, use and branding synergies would likely be missed.

## **Existing and Induced Market Utilization**

This analysis focuses on the net inducement of new/expanded local and non-local sports league and tournament play in Eugene-Springfield by virtue of the development of the proposed new Multi-use Sports Complex as outlined above. A portion of this new induced market will be accommodated at the new Multi-Use Complex, while others will be accommodated at other local facilities through the assumption of new periods of availability as some existing demand shifts to the new Facility. Therefore, the incremental induced demand reflects the net effect in the Eugene-Springfield marketplace as a result of the recommended Multi-use Facility development and annual operation. Key findings associated with the analysis include:

- Existing baseball/softball leagues and programs. There are more than 600 teams and 8,200 players currently utilizing baseball/softball fields throughout the Eugene-Springfield market for league games. This resulted in an estimated 216,600 people attending the more than 6,900 games played throughout a typical year, of which, approximately 18 percent (more than 39,400 people) originated from outside of the cities of either Eugene or Springfield.
- Existing baseball/softball tournaments. Approximately 11 tournaments occur at Eugene-Springfield baseball/softball fields annually. These tournaments include nearly 900 games played on Eugene-Springfield baseball/softball fields, attracting approximately 36,000 total attendees, of which, nearly 17,200 are non-local attendees.



- Growth in baseball/softball leagues and programs. Assuming a facility development program is pursued as outlined, and the facility is managed by professional, competent and experienced facility management personnel that will promote events in keeping with Eugene and Springfield's goals of community involvement and economic impact, local league participation (players/teams) is projected to grow by approximately 18 percent.
- Growth in baseball/softball tournaments. The added field inventory and critical mass of fields in one location would be expected to attract 28 new tournaments and more than 15,700 incremental players, of which, an estimated 71 percent would originate from outside of the Eugene-Springfield market. Overall, additional baseball/softball fields would be expected to attract nearly 202,700 incremental attendees, of which, nearly 119,600 (59 percent) would be non-local.
- Existing rectangle field leagues and programs. An estimated 1,070 teams and 13,000 players currently utilize multisport rectangle fields throughout Eugene and Springfield for various league play, consisting of over 8,400 soccer, football (flag and tackle), rugby, lacrosse and ultimate Frisbee games. An estimated 275,900 people participated and/or attended these games, with approximately 37,200 of these attendees coming from outside of the Eugene-Springfield market.
- Existing rectangle field tournaments. There are an estimated 11 annual rectangle-field tournaments throughout Eugene-Springfield; Approximately 85 percent of the teams and participants utilizing existing facilities for these tournaments reside in Eugene or Springfield.
- Growth in rectangle field leagues and programs. Assuming the development of rectangle fields as outlined earlier in this chapter, it is estimated that latent demand for multisport rectangle fields would account for approximately 14 percent growth among existing teams, serving an additional 1,960 participants. This includes accommodating growth within Emerald KIDSPOrts of an estimated 1,400 participants in football, flag football, spring soccer, fall soccer and lacrosse leagues that currently cannot participate due to lack of adequate field access. Further opportunities may exist for increasing usage among developing sports such as lacrosse, rugby, and field hockey.
- Existing rectangle field tournaments. Opportunities exist to develop new/larger tournaments within the market with a concentration of game-quality fields as outlined. It is estimated that these additional/larger tournaments would result in 17 new tournaments, attracting more than 66,900 attendees. Of these attendees, nearly 45,500 (or 68 percent) would be projected to come from outside of the Eugene-Springfield market.

## Next Steps

If the City elects to pursue Phase Two of the study, we would work with the City to agree on between one and three development scenarios to advance through Phase Two. The key Phase Two analysis tasks would include: (1) site analysis; (2) preliminary construction cost analysis; (3) financial operations analysis; (4) economic impact analysis; and (5) funding/ownership/management analysis.

# 1.0 INTRODUCTION

Conventions, Sports and Leisure International (CSL) was engaged by the City of Eugene (City) to study the feasibility of new multi-use sports facilities in Eugene and Springfield, Oregon. The contracted study involves the analysis of the market, programmatic, financial and economic feasibility of new multi-use sports facilities in Eugene and Springfield.

The attached report outlines the key findings associated with Phase One of a potential two-phased study. Phase One focuses on analysis of market demand and supportable programmatic aspects of the project. This report presents our research, analysis and findings and is intended to assist the Eugene Parks and Open Space Division, Travel Lane County, and other stakeholders in evaluating the viability of sports and recreation facility development and operation.

The purpose of this study is to:

*Analyze the market, programmatic, financial and economic feasibility of new multi-use sports facilities in Eugene and Springfield for the purpose of enhancing rental and practice sports and recreation facility alternatives for local area residents, as well as driving new revenue and economic impact to the area.*



Specifically, the envisioned facility products would serve to: (1) provide a public resource for local residents (by accommodating local sports and recreation activities); (2) enhance the ability to drive additional revenue for City sports and recreation programs and facilities; and (3) generate new economic impact (through attracting tournaments, competitions, and meets with non-local participants and attendees).

Potential investment could involve new and/or enhanced facility products designed to accommodate one or more sports and recreation types, including but not limited to: (1) outdoor sports such as soccer, baseball, softball, lacrosse, field hockey, rugby, track and field, tennis, and other sports/recreation, and (2) indoor sports such as basketball, volleyball, swimming, running/track, gymnastics, wrestling, cheerleading, and other such sports/recreation.

Facility product concepts considered through this study included an outdoor field complex, a flexible flat floor indoor facility, a natatorium/aquatic center, an indoor track facility, and other such facilities.

A state-of-the-industry outdoor complex would be designed to offer a critical mass of high-quality "triangle" fields (i.e., baseball and softball) and/or "rectangle" fields (i.e., soccer, lacrosse, field

hockey, football, etc.) in a single location. The facilities would be positioned to maximize the accommodation of demand from local City of Eugene Park and Open Spaces programming, league and tournament play by residents, ideally allowing for the growth of local programs, leagues, clinics and training within Eugene and Springfield. Additionally, the complex would be designed to be “tournament ready”, in order to effectively compete for non-local tournaments (largely occurring on the weekends) that would represent key generators of new visitation and economic impact in Eugene, Springfield and throughout Lane County.

A state-of-the-industry indoor facility would be designed with sufficient flexibility and standards to attract a variety of sports/rec activities, such as basketball, volleyball, wrestling, dance, cheerleading, martial arts and other such tournaments. Facilities of this nature integrate a critical mass of courts and square footage in a contiguous, high ceiling, largely column free space. Facilities offer high-quality playing surfaces and equipment, spectator seating and other modern amenities that allow them to maximize local demand, while also effectively competing for tournaments, competitions and matches, many of which represent participants and spectators that do not reside locally—resulting in new visitation and economic impact.

A state-of-the-industry natatorium would be designed to offer a high-quality, state-of-the-industry indoor aquatic facility appropriate for accommodating competitive swimming and diving programs, area school programs and local swim clubs, attracting non-local competitions/meets, as well as accommodating swim lessons, therapy and general recreation purposes. Many swim meets attract participants and spectators from outside the local area, thereby generating new visitation and economic impact.

A state-of-the-industry indoor track facility would be designed to accommodate a variety of local and non-local track and field uses, including high school, college, and professional/open/masters level meets and training. A typical high quality, modern indoor track facility might include a 200 meter, six-lane banked Mondo track, two large runways and sand pits, a pole vault pit, a throws cage and elevated spectator seating.

The study process, outlined herein, consisted of detailed research and analysis, including a comprehensive set of market-specific information derived from the following:

- ✓ Experience garnered through more than 500 sports, recreation and event facility feasibility, planning and benchmarking projects throughout the country.
- ✓ Local market visit at the outset of the project, including community and facility tours, and discussions with study stakeholders.
- ✓ In-person and telephone interviews, meetings and focus groups with in excess of 50 local Eugene and Springfield area individuals, including representatives and individuals affiliated with Eugene Parks and Open Spaces Division, KIDSPORTS, Willamalane Park District, Travel Lane County, local sports and nonprofit organizations, potential funding partners, municipal government representatives, and other local area individuals.
- ✓ Research and analysis of local market conditions, existing facilities and infrastructure and amateur sports and recreation trends.
- ✓ Benchmarking research and analysis of facility data and interviews conducted with management of more than 35 comparable sports and recreation complexes located throughout the region and country.
- ✓ Comparative analysis of socioeconomic data from competitive/comparable facility markets.
- ✓ Completed telephone interviews with more than 40 representatives of sports & rec organizations/governing bodies with state, regional and/or national tournament/meet scope.

## 2.0 LOCAL MARKET CONDITIONS

An important component in assessing the potential success of new Multi-Use Sports Facilities in the Eugene-Springfield area is the demographic and socioeconomic profile of the local and regional market. The strength of a market in terms of its ability to support and utilize recreational sports facilities is measured, to some extent, by the size of the local and regional market area population, its age, income, and other characteristics.

In addition to the demographic profile of the local and regional market area, other local market characteristics have relevance when considering the attractiveness of a particular community as a host for high quality sports and recreation complexes/facilities. These include items such as transportation accessibility, climate, existing inventory of athletic facilities, and visitor amenities (such as hotels, attractions and other such items).

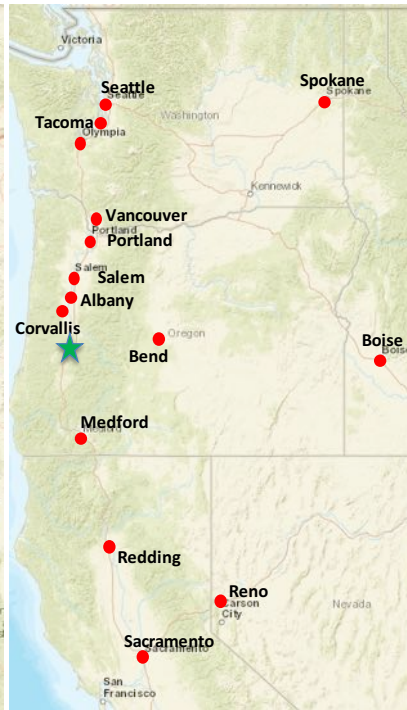
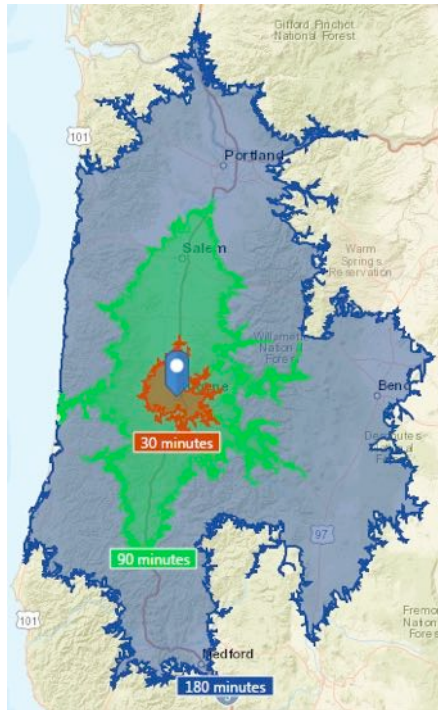
### Background, Location and Accessibility

Situated in the south end of Oregon's Willamette Valley near Interstate 5, Eugene-Springfield is just under two hours from Portland and within practical driving distance of Salem, Medford and Vancouver, Washington. Other major metropolitan areas such as Seattle, Sacramento and Reno are longer drives, but are still relevant due to Eugene-Springfield's interstate access. Eugene-Springfield offers a variety of historical, cultural and natural attractions, with the University of Oregon serving as a significant component of the area's economy and destination product. Over 24,000 students attend the University, and the campus features state of the art athletic facilities including the 54,000-seat Autzen Stadium and the 12,000 seat Matthew Knight Arena.

Exhibit 1 illustrates the location of Eugene-Springfield and its regional markets, the approximate drive time and the market populations. Additionally, the exhibit demonstrates the markets and land area captured within 30-, 90- and 180-minute estimated driving distances. It should be noted that the city of Eugene serves as the central point for these driving distances. These rings will also be utilized throughout the report while analyzing and comparing demographic and socioeconomic variables.



## Exhibit 1 Location and Transportation – Driving Distances to Nearby Major Markets



City	Distance from Lane County	Drive Time	Market Population
Albany, OR	44 mi.	0:50	119,400
Corvallis, OR	47 mi.	0:50	86,300
Salem, OR	66 mi.	1:10	404,000
Portland, OR	111 mi.	1:50	2,348,200
Vancouver, WA	119 mi.	2:00	2,348,200
Bend, OR	130 mi.	2:30	170,400
Medford, OR	166 mi.	2:40	210,300
Olympia, WA	223 mi.	3:50	265,900
Tacoma, WA	253 mi.	4:20	3,671,500
Redding, CA	315 mi.	4:50	179,800
Seattle, WA	283 mi.	5:00	3,671,500
Spokane, WA	461 mi.	7:10	541,000
Sacramento, CA	473 mi.	7:20	2,244,400
Reno, NV	427 mi.	7:30	444,000
Boise, ID	446 mi.	8:00	664,400

Source: Google Maps, Esri, 2016

Transportation access to and from potential new Eugene-Springfield Multi-Use Sports Facilities represents a key element of viability. Convenient local access to a potential new sports complex will be important to the local and regional sports participants who will be the primary users of the potential facilities, while regional access characteristics will likely influence the ability of the venue to attract tournaments drawing teams from throughout the Pacific Northwest.

Industry research indicates that participants in youth and adult sports tournaments are willing to travel, on average, up to 200 miles to participate in regional tournaments. This puts Eugene-Springfield within tournament draw distance of seven population centers for a total of over 3.3 million people. Additionally, large metropolitan areas such as Seattle and Sacramento are located outside of the 200-mile “driving” distance, though well within a day’s drive. These communities represent potential sources of participating teams for regional tournaments, meets or competitions held at potential new Eugene-Springfield Multi-Use Sports Facilities.

## Demographics and Socioeconomic Characteristics

The historical, current and projected demographic and socioeconomic characteristics of the Eugene-Springfield area, the State of Oregon and the surrounding regional area provide an indication of the market's ability to support potential sports facilities in Eugene-Springfield.

The demographic and socioeconomic data presented in this report is based on the anticipated primary and secondary markets of potential new Multi-Use Sports Facilities in Eugene-Springfield. The primary market is the geographic area from which it is anticipated that the majority of participants and attendees are expected to originate. The size of this primary market area can be influenced by such factors as transportation systems, site accessibility, media coverage and competing venues in the surrounding region. For purposes of this analysis, the area within a 30-minute drive from the City of Eugene represents the "primary" market for potential new multi-use sports facilities. The area between the 30-minute drive time and the 90-minute drive time effectively represents Eugene-Springfield's secondary market. In addition to residents of the primary and secondary market areas, the potential sports complex will draw patrons from a larger geographic area for regional and national sports tournaments, including much of the Pacific Northwest region.

A variety of industry research suggests that, on average, sports teams and their participants are often willing to travel up to 200 miles to attend tournaments. Therefore, the analyses presented herein also include information regarding the demographics within a 180-minute drive of the center of the city of Eugene.

Exhibit 2 presents the historical, current and projected demographic and socioeconomic characteristics of the Eugene-Springfield area, including Lane County, the primary and secondary markets of potential new Multi-Use Sports Facilities, a 180-minute drive from the city of Eugene, the state of Oregon and the U.S. as a whole.

**Exhibit 2**  
**Demographics Summary – Eugene-Springfield Area**

Demographic Variable	Eugene	Lane County	30-minute	90-minute	180-minute	State of Oregon	U.S.
Population (2000)	141,897	322,959	281,794	880,757	3,406,814	3,421,399	281,421,906
Population (2010)	156,185	351,715	309,742	976,924	3,886,392	3,831,074	308,745,538
Population (2015 est.)	159,875	359,308	316,224	1,002,100	4,024,008	3,953,654	316,296,988
% Change (2000-2015)	12.7%	11.3%	12.2%	13.8%	18.1%	15.6%	12.4%
Population (2020 est.)	163,617	367,202	323,050	1,027,782	4,189,124	4,101,646	327,981,317
% Change (2015-2020)	2.3%	2.2%	2.2%	2.6%	4.1%	3.7%	3.7%
Avg. Household Inc. (2015 est.)	\$ 59,685	\$ 58,736	\$ 59,011	\$ 61,339	\$ 71,181	\$ 68,854	\$ 72,809
Avg. Household Inc. (2020 est.)	\$ 68,135	\$ 66,916	\$ 67,208	\$ 69,726	\$ 81,302	\$ 78,687	\$ 83,937
% Change (2015-2020)	14.2%	13.9%	13.9%	13.7%	14.2%	14.3%	15.3%
Median Age (2015, in years)	34.8	39.9	37.7	38.0	38.8	39.3	37.7
Businesses (2015 est.)	9,062	16,848	15,248	42,977	178,862	184,825	24,262,035
Employees (2015 est.)	104,778	188,427	178,397	487,100	1,921,998	1,924,563	141,523,742
Employee/Residential Population Ratio	0.66:1	0.52:1	0.56:1	0.49:1	0.48:1	0.49:1	0.45:1

Source: Esri, 2016

The level of population from which facilities will draw participants, both short-term and long-term, will impact the utilization of potential new Multi-Use Sports Facilities in Eugene-Springfield. As shown in Exhibit 2, it is important to note that the land area captured within a 180-minute drive of Eugene has experienced the greatest population growth of all the markets analyzed, increasing by over 18 percent from the year 2000. This population increase is materially higher than the growth experienced by the U.S., the state of Oregon and Lane County. Future projections estimate Lane County's population will approximate 367,200 in 2020, whereas the secondary and 180-minute drive populations are projected to be 1.0 million and 4.2 million, respectively.

Because the secondary market area surrounding Eugene-Springfield is characterized by a modest population base, it will be important for a potential sports and recreation complex to draw patrons and users from the regional three-hour drive time markets base of approximately 4.0 million people in order to maximize a potential complex utilization, particularly for tournaments and events. Perhaps one of the potential complex's greatest strengths will be its central location within the central region of west Oregon and accessibility from larger nearby metropolitan areas.

Household income is another important socioeconomic characteristic important to the potential success of potential new Multi-Use Sports Facilities in Eugene-Springfield. Income levels can serve as an indication of area households' ability to support athletics in the region by paying league fees and other costs associated with participation. The affluence of area households can also impact the types of programming that will be most successful at the sports complex, as household income levels often impact the types of sports that are played by a specific populace.

Average household income surrounding the Eugene-Springfield area ranges from a low of approximately \$58,700 in Lane County to a high of approximately \$71,200 in the 180-minute drive time range in 2015. Future projections estimate the surrounding region's household incomes to increase by approximately 14.0 percent between 2015 and 2020, just below the nation's average estimate of 15.3 percent.

As is typical in most communities housing a complex of the nature being considered, the marketplace will likely be sensitive to material increases in youth sports registration fees that may become necessary to support the operations of potential amateur and recreational sports facilities. In developing fee structures for a potential sports and recreation complex, it will be important to identify price points that allow local sports/recreational organizations to afford to use the facilities without pricing-out the participant base through increased participation/registration fees. To potentially mitigate the impact of lower household incomes, it may become important to emphasize the opportunities provided by a sports and recreation complex to youths from underprivileged families. Further, it may be beneficial to consider scholarship and other financial assistance programs to maximize utilization of the facilities.

The depth and breadth of the local and regional corporate market could play an important role in the success of new Multi-Use Sports Facilities in Eugene-Springfield. Within Lane County, there are approximately 16,800 businesses, with the city of Eugene's 9,100 businesses accounting for nearly 54 percent of this inventory. The corporate base within a three hour drive of Eugene is nearly 179,000 businesses.

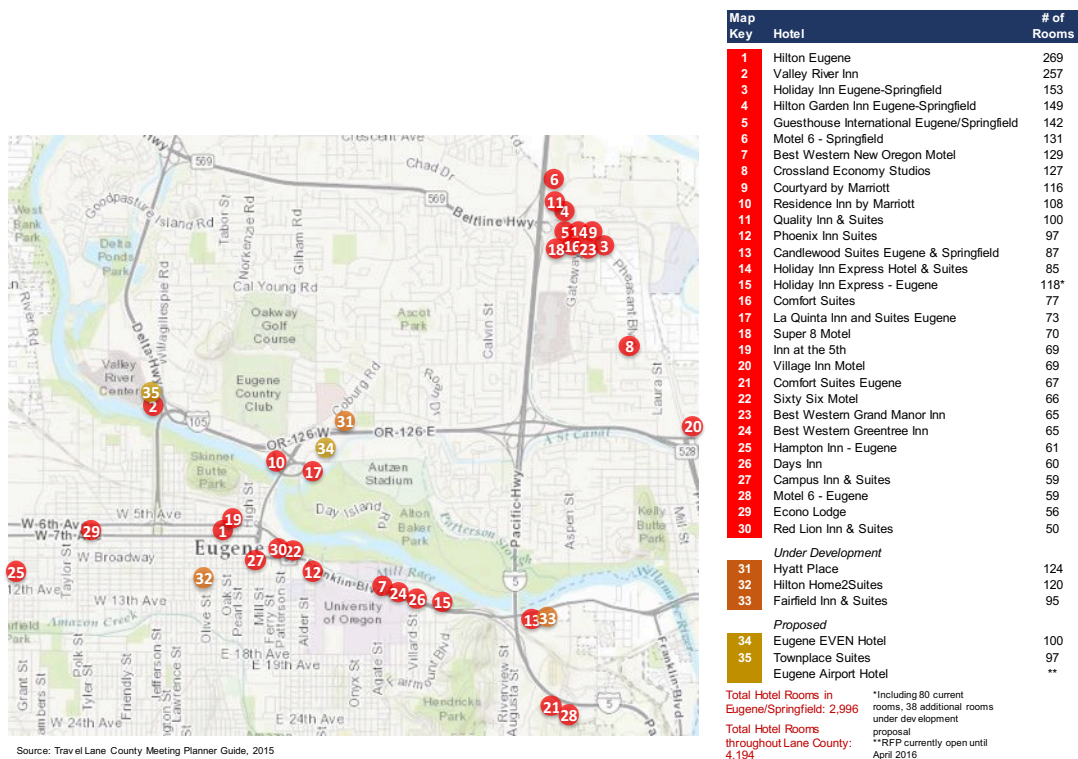
The majority of corporate sponsorship opportunities at potential new Multi-Use Sports Facilities in Eugene-Springfield will likely be in the form of field sponsorships, banners, scoreboard advertising and other such opportunities; many of which would be relatively inexpensive. As a result, it is likely that a significant portion of these companies would have the wherewithal to participate in advertising and sponsorship opportunities at potential sports complex.

Additional population demographic analyses can be found in Appendix A of this report.

## Hotel Inventory

To drive new visitation and economic impact to the Eugene-Springfield destination, it is important to evaluate the ability of the local market to provide an adequate number of hotels that are convenient to the potential new amateur sports complex site. It is also a key consideration for sports organizations when choosing tournament or meet sites. Exhibit 3 presents a map of the primary lodging facilities in Eugene-Springfield, offering a minimum of 50 guestrooms.

**Exhibit 3**  
**Primary Eugene-Springfield Hotels**



As displayed, the Eugene-Springfield area has 30 hotel properties with at least 50 guestrooms. The largest single property is the Hilton Eugene in the city's downtown with 269 hotel rooms. Most of the hotels listed are considered affordable, limited- or select-service hotel properties. These are the types of properties best suited for accommodating participant and family members that may travel to the county for regional and national tournaments at potential new amateur and recreational sports facilities.

As shown, clusters of hotel properties exist in and near downtown Eugene and in the area surrounding Springfield's Gateway Mall along Interstate 5. While certain public assembly facilities such as convention centers greatly benefit from having an attached or adjacent "headquarters hotel" (typically of a full-service nature), sports and recreation facilities generally do not require a single property within very close proximity to enhance its marketability for non-local events as participants are generally willing to drive 15 to 20 minutes to the host facility. The overall market inventory of nearly 3,000 guest rooms is likely to be adequate for the size of tournaments and events that could be accommodated by a potential sports and recreation complex in Eugene-Springfield.



## Eugene-Springfield Athletic Facilities

An understanding of the inventory and quality of existing athletic indoor and outdoor facilities in the cities of Eugene and Springfield is critical in identifying potential areas of local and non-local need that may be met by potential new Multi-Use Sports Facilities. New potential facilities can maximize utilization and become a more valued community asset if they can provide sports and recreation facilities and other programming in areas that may currently be lacking in the Eugene-Springfield area.

Exhibit 4 summarizes the existing inventory of athletic and recreation facilities in Eugene and Springfield. The facilities included in the lists below were identified by local leadership as being game ready and community accessible, and are able to be used for both adult and youth athletic practices and/or games. It should be noted that field inventories in the table include varying qualities of fields. For example, several of the soccer fields included in this inventory are smaller than regulation size and/or do not offer "tournament quality" playing surfaces, seating and/or amenities. Further, many of the facilities are associated with schools that do not open their facilities to public use when school is in session.

**Exhibit 4**  
**Inventory of Eugene and Springfield Amateur Sports Facilities**

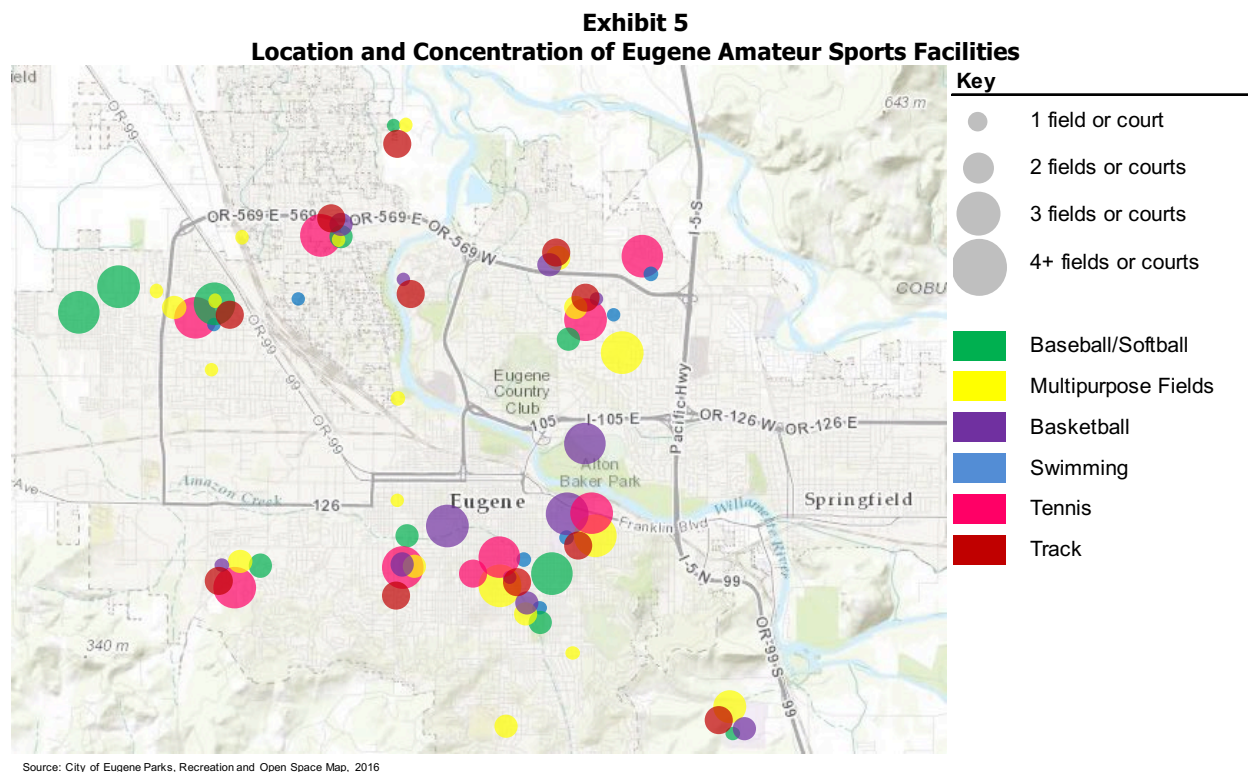
Facility	Location	Basketball	Volleyball	Rectangle	Triangle	Tennis	Aquatic	Track	Facility	Location	Basketball	Volleyball	Rectangle	Triangle	Tennis	Aquatic	Track
Amazon	Eugene	-	-	2	2	-	50m	-	South Eugene High School	Eugene	1	5	4	4	4	-	Yes
Ascot (Monroe Middle School)	Eugene	-	-	4	-	-	-	-	Spencer Butte Middle School	Eugene	-	-	2	-	-	-	-
ATA/Jefferson	Eugene	2	6	2	-	-	-	Yes	Ted Norman Memorial Baseball Complex	Eugene	-	-	-	4	-	-	-
Cal Young Middle School	Eugene	2	6	2	-	-	-	Yes	University of Oregon Rec Facilities**	Eugene	14	28	6	-	12	25yd	Yes
Cesar Chavez Elementary School	Eugene	-	-	-	2	-	-	-	Washington Park	Eugene	-	-	-	-	2	-	-
Churchill High School	Eugene	1	3	2	2	4	-	Yes	Westmoreland	Eugene	-	-	-	-	4	-	-
Echo Hollow Park	Eugene	-	-	-	4	-	25yd(2)	-	Willamette High School	Eugene	-	-	1	4	-	-	Yes
Emerald Pool	Eugene	-	-	-	-	-	25yd	-	YMCA	Eugene	-	-	-	-	-	25yd	-
Eugene Swim and Tennis Club	Eugene	-	-	-	-	17	25yd	-	Agnes Stewart Middle School	Springfield	2	4	2	1	-	-	-
Ida Patterson*	Eugene	-	-	-	-	-	-	-	Bob Artz Memorial Park	Springfield	-	-	-	3	-	-	-
Kelly Middle School	Eugene	-	-	1	-	-	-	-	Briggs Middle School	Springfield	2	4	3	3	-	-	Yes
Kincaid Park	Eugene	-	-	1	-	-	-	-	Courtsports Athletic Club	Springfield	1	2	-	-	-	25 yd	-
Lane Community College	Eugene	2	6	3	1	-	-	Yes	Douglas Gardens Park	Springfield	-	-	-	-	1	-	-
Lane County Fairgrounds	Eugene	-	5	-	-	-	-	-	Guy Lee Park	Springfield	-	-	-	2	2	-	-
Madison Middle School	Eugene	-	-	1	1	-	-	Yes	Hamlin Middle School	Springfield	2	4	1	2	-	-	-
Marist High School	Eugene	1	3	-	-	-	-	Yes	Kick City Indoor Soccer	Springfield	-	-	1	-	-	-	-
Maurie Jacobs	Eugene	-	-	1	-	-	-	-	Meadow Park	Springfield	-	-	-	-	2	-	-
Meadowview Middle School	Eugene	-	-	2	-	-	-	-	Page Park	Springfield	-	-	-	-	2	-	-
Moshofsky Sports Center	Eugene	-	16	-	-	-	-	-	Splash! at Lively Park	Springfield	-	-	-	-	-	25yd	-
North Eugene High School	Eugene	2	6	1	2	4	-	Yes	Springfield High School	Springfield	3	6	2	3	4	-	Yes
Petersen Barn	Eugene	-	-	1	-	-	-	-	Thurston High School	Springfield	2	4	3	4	6	-	Yes
Roosevelt Middle School	Eugene	2	6	-	-	-	-	-	Thurston Middle School	Springfield	1	2	6	3	-	-	Yes
Shasta Middle School	Eugene	-	-	1	4	-	-	-	Willamalane Center for Sports and Recreation	Springfield	6	11	4	2	4	-	-
Sheldon High School	Eugene	1	4	2	2	4	25yd	Yes	Willamalane Park Swim Center	Springfield	-	-	-	-	-	25yd	-

Note: City of Eugene counts three volleyball courts per full-sized basketball court.

\* - youth fields only

\*\* - court inventory includes courts in Matthew Knight Arena (2), Student Recreation Center Courts (9), and Gerliner Annex (3)

The map below illustrates the sports facilities located in the city of Eugene. The number of fields or courts at each location has been accounted for by the size of placement markers.



As shown, the majority of existing facilities are located near downtown Eugene and the University of Oregon campus (which is just east of the downtown). The University's offerings include six total multipurpose rectangle fields, a total of 14 basketball courts, a total of 12 tennis courts, a 25-yard pool at the UO Student Recreation Center and also the outdoor track at Hayward Field. However, it is important to note that these facilities are often in use by University-related programming and are not regularly available for the area's local population to rent.

A potential new sports complex within an area that offers a critical mass of fields and/or courts for a particular sport would likely make the Eugene-Springfield area a more marketable tournament destination, as the potential complex could serve as the central tournament location, rather than spreading games across a number of smaller one or two-field/court facilities. For instance, there are four such complexes that offer more than two triangle (baseball/softball) fields in Eugene, but the Ted Norman Memorial Baseball Complex is the only such facility that is not located on a school property. The city's inventory of rectangle (soccer/multi-sport) fields is similarly spread out – though the city features 11 artificial turf full-sized rectangle fields, there are only two locations that have more than one onsite (the University of Oregon and Lane Community College, both of which are academic institutions).

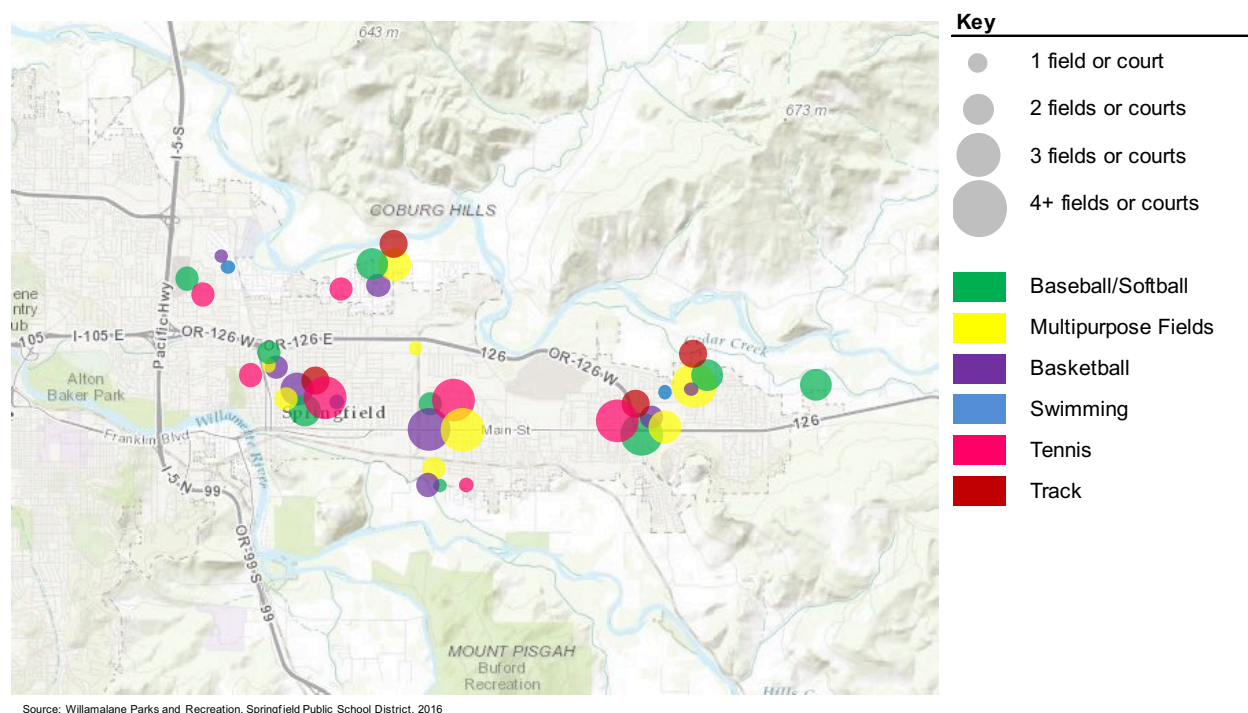
In regards to indoor sports, the city lacks a facility with more than two basketball courts, and features five complexes that feature two (Arts and Technology Academy at Jefferson, Cal Young Middle School, Lane Community College, North Eugene High School, and Roosevelt Middle School). The University's Moshofsky Center can accommodate 16 volleyball courts while Lane County Fairgrounds' Sports Center houses five

volleyball courts, but neither of these facilities are typically used for basketball. The city also features six aquatic facilities that can host local practices and competitions, including the outdoor 50-meter pool at Amazon Park, the two 25-yard pools at Echo Hollow Park, and the other four 25-yard pools found at Eugene Swim and Tennis Club, Sheldon Community Center, UO Student Recreation Center and the city's YMCA.

Other notable facilities in the area include the 17 tennis courts at Eugene Swim and Tennis Club, the four-tennis court facilities located at Churchill High School, Westmoreland Park, North Eugene High School, Sheldon High School and Echo Hollow. Moreover, including the University of Oregon's world class Hayward Field, there are currently 11 outdoor tracks in the area.

An identical analysis of Springfield's amateur sports facilities has also been conducted. Exhibit 7 summarizes the existing inventory of athletic and recreation facilities in Springfield.

### Exhibit 6 Location and Concentration of Springfield Amateur Sports Facilities



With its smaller population base, the city of Springfield has an understandably less sizable overall inventory of amateur sports facilities in comparison with Eugene. However, the Willamalane Center for Sports and Recreation (the largest cluster of markers in Exhibit 5) offers a relatively significant concentration of both outdoor rectangle fields (four) and indoor court facilities (six for basketball and 11 for volleyball) that is not currently present in Eugene.

Excluding the Willamalane Center for Sports and Recreation, only Thurston Middle School (six) and Briggs Middle School (three) offer more than two rectangle fields, and only Springfield High School offers more than two basketball courts (three). With regard to other types of athletic facilities, Springfield features five complexes with more than two triangle fields, including the three fields located at Bob Artz Memorial Park, Briggs Middle School, Thurston Middle School, Springfield High School and the four fields at Thurston High

School. The area also offers three 25-yard pools, three facilities with four or more tennis courts, and four outdoor tracks.

Among existing facilities that are used by adult and youth sports groups in Eugene and Springfield, there are a total of 49 triangle fields, 59 rectangle fields and 47 indoor basketball courts, approximately 130 volleyball courts, nine pools, 71 tennis courts and 15 outdoor tracks in the Eugene-Springfield area. More detailed information regarding each city's sports facility inventory can be found in Appendix B of this report.

To better understand the local amateur sports market in the Eugene-Springfield area, the Willamalane Center for Sports and Recreation was analyzed in greater detail due to its substantial concentration of multiple types of athletic facilities. A case study detailing the facility's assets and operations is shown below.

<b>FACILITY:</b>	WILLAMALANE CENTER FOR SPORT AND RECREATION
<b>City, State:</b>	Springfield, Oregon
<b>Owner:</b>	Willamalane Park and Recreation District
<b>Operator:</b>	Willamalane Park and Recreation District
<b>Facility Specs:</b>	97,000 total square feet 6 basketball courts/11 volleyball courts 4 indoor tennis courts 3 roller derby rinks 4 outdoor baseball/softball fields 4 lighted outdoor artificial turf soccer fields Outdoor seating for 1,000 people



The Willamalane Center for Sports and Recreation, located in Springfield, was a formerly privately owned Regional Sports Center that foreclosed in 2010. The complex's Les Schwab Park, comprised of four lit artificial turf multipurpose rectangle fields, were added for a project cost of \$3.6 million. This was backed by funds from a voter-approved bond measure in 2012.

The Center is a 27-acre indoor and outdoor sports facility that offers six basketball courts, 11 volleyball courts, four artificial turf rectangle fields and two artificial turf softball fields with an outdoor fixed seating capacity of 1,000. Additionally, the 97,000-square foot indoor complex offers a 33-foot rock climbing wall, a fitness center, the Two50 Youth Center, pre-school classrooms, fitness classrooms and two conference rooms.

Rental rates for the indoor courts range between \$25 to \$60 per court hour, with volleyball groups typically paying less due to their need for only partial courts. The outdoor fields cost between \$25 and \$45 per field per hour, with approximately \$15 per field per hour added to this cost for lights. Tenants of its outdoor fields include Northwest Christian University's soccer team and the semi-pro Lane United Football Club.

The Willamalane Center for Sports and Recreation primarily serves as a community activities center that caters to local amateur sports groups and the general public. As shown in Exhibit 6 below, soccer groups, such as the Lane United Soccer Club, represent the most frequent user type that utilize the outdoor fields, while the multi-purpose courts are frequently used for indoor tennis, roller derbies and volleyball, and the wood courts are frequently used for basketball, volleyball and other sports (such as pickleball and table tennis). Usage statistics indicate that the outdoor fields were most frequently utilized from July through October (with 19 percent of available hours being utilized), while the indoor courts were used more consistently year round but experienced moderate spikes in usage during the period between the beginning of January and through the end of March (with a notable 41 percent of available hours being utilized).



Notably, a significant amount of available dates are devoted to non-sport activities such as tradeshow and youth activities (i.e. youth camps, sleepovers) which make up a moderate portion of the Center's indoor courts' total utilization, further demonstrating the Center's designation as a community-oriented facility.

**Exhibit 7**  
**Willamalane Center Facilities Utilization by Sport - 2015**

	North Fields		South Fields	
	Field 1	Field 2	Field 3	Field 4
Baseball	0%	0%	26%	36%
Other	7%	6%	7%	8%
Other Sports	10%	25%	6%	5%
Soccer	84%	67%	60%	50%
Youth Activities	0%	2%	1%	1%

	Multi-Sport Courts					
	Court 1	Court 2	Court 3	Court 4	Court 5	Court 6
Baseball	0%	0%	0%	0%	0%	0%
Basketball	0%	0%	0%	0%	0%	0%
Gymnastics	6%	17%	4%	5%	2%	2%
Open Gym	0%	0%	0%	0%	0%	0%
Other	3%	3%	2%	2%	1%	1%
Other Sports	18%	8%	7%	10%	0%	1%
Roller	23%	23%	22%	27%	9%	9%
Soccer	0%	0%	0%	0%	0%	0%
Table Tennis	0%	0%	0%	0%	0%	0%
Tennis	16%	12%	29%	36%	76%	76%
Trade Show	14%	14%	7%	8%	5%	5%
Volleyball	11%	11%	5%	7%	4%	4%
Youth Activities	8%	13%	25%	6%	3%	3%

	Wood Courts					
	Court 7	Court 8	Court 9	Court 10	Court 11	Court 12
Baseball	0%	0%	0%	0%	0%	1%
Basketball	32%	33%	21%	20%	14%	17%
Gymnastics	3%	3%	4%	4%	5%	5%
Open Gym	11%	11%	21%	20%	5%	5%
Other	6%	6%	6%	6%	7%	6%
Other Sports	3%	3%	1%	1%	1%	22%
Roller	0%	0%	0%	0%	0%	0%
Soccer	1%	1%	3%	3%	2%	2%
Table Tennis	0%	0%	0%	0%	34%	4%
Tennis	0%	0%	1%	1%	1%	1%
Trade Show	9%	10%	10%	10%	11%	12%
Volleyball	14%	15%	13%	14%	13%	18%
Youth Activities	20%	17%	22%	22%	7%	7%

Note: Assumes 15 hours of operation between 5:00 AM and 12:00 AM Monday through Sunday  
Source: Willamalane Center for Sports and Recreation, 2016

Between fiscal year 2013 through fiscal year 2015, the Center has averaged an annual operating deficit of approximately \$421,400. User and program fees contribute to much of its income (an average annual revenue of \$185,300 per year), while salaries, wages and benefits represent its most significant expense item (approximately \$556,300 per year).

## Conclusions

The strength of a market in terms of its ability to support and utilize sports and recreation facilities is measured, in part, by the size of the local and regional market area population and its age, income and other characteristics. Other local market characteristics have relevance when considering the attractiveness of a particular community as a host for major amateur sports facilities, including transportation accessibility, climate, existing local inventory of athletic facilities, and visitor amenities (such as hotels, attractions and other such items).

In addition to the demographic and socioeconomic characteristics of the local and regional market, transportation access to and from potential new Eugene-Springfield Multi-Use Sports Facilities represents a key element of the viability of any potential facilities. Convenient local access to the Facilities will be paramount to the local and regional sports participants who will represent the majority of users of potential Facilities, while regional access characteristics will likely influence the ability of the venue to attract tournaments drawing teams from throughout Oregon, the Pacific Northwest area and beyond. Industry research indicates that participants in youth and adult sports tournaments are willing to travel, on average, up to 200 miles to participate in regional tournaments. The population within a 180-minute drive time of Eugene-Springfield is just under 4.2 million, providing a moderate population base from which the proposed facilities could draw tournament participants. Additionally, large metropolitan areas such as Sacramento and Seattle are located just outside of the 180-minute “driving” distance, though well within a day’s drive. These communities represent potential sources of participating teams for regional tournaments, meets or competitions held at any potential new recreational and amateur sports complex/facility in Eugene or Springfield.

While a number of sports and recreation facilities, pools and fields exist throughout Eugene and Springfield, the area is lacking a significant concentration of such facilities in a single location. Many communities have seen that developing a new Multi-Use Sports facility benefits the local sports market by consolidating activities and facilities at one single site, and such developments have assisted in recreational activity participation growth in a given area. Specifically, the area lacks a facility with more than six triangle or rectangle fields, representing a possible need area that may be preventing the community from developing more thriving club sport participation. In regards to indoor sports, facilities such as Willamalane Center for Sports and Recreation and the Sports Center at Lane County Fairgrounds accommodate a steady amount of basketball and volleyball activity throughout the year; however, the Willamalane Center for Sports and Recreation’s operating mandate requires minimum rental payments to reserve space, and the facilities at the Lane County Fairgrounds are aging and oftentimes are susceptible to leaking. Additionally, Willamalane’s indoor courts’ relatively high occupancy levels may also indicate the need for an eventual expansion of its indoor space. Further, while elementary, middle and high schools accommodate a significant amount of indoor gym-space demand, shrinking school budgets and booking priorities that reserve gym space for school-related functions first, reliable access to these venues is becoming increasingly sparse.

Moreover, any envisioned Eugene-Springfield recreational and amateur sports facilities designed with these quality and volume standards would allow the area to be a more marketable tournament/competition destination—in terms of offering a quality indoor competition aquatic facility and/or a high quality complex that would serve as the central tournament location (for indoor and/or outdoor sports), rather than spreading games across a number of limited field/court facilities (which tends to be much less desirable, particularly for major traveling tournaments).

Non-local participating teams at any potential amateur sports complexes/facilities would have a positive impact on the Eugene-Springfield economy by supporting area hotels, restaurants and other establishments during their visit to the area. Economic impact generated by non-local participants and their families is typically a critical reason for the consideration of public investment in these types of larger sports and

recreational facilities. Offering an appropriate number of facilities to attract a critical mass of non-local tournament, meet or competition participants is an important factor in generating this economic impact. However, the ability of the local market to provide an adequate number of hotels that are within reasonable driving distance from the potential facilities is also a key element for ensuring that the economic benefit created by hosting amateur sports events is maximized within the local community and a key consideration for sports organizations selecting potential tournament, meet or competition destinations.

The overall hotel room inventory in (nearly 3,000 rooms) is believed to be sufficient for the types of tournaments that could be accommodated by potential new recreational and amateur sports facilities, while still accommodating business and other leisure travelers. Most of the hotels in Eugene and Springfield consist of affordable, limited service hotel properties. These are the types of facilities that are best suited for accommodating participants and family members associated with the non-local sports tournaments, meets and competitions that are the target candidates for the type of facilities considered in this study. The existing hotel inventory in the Eugene-Springfield area is of a sufficient level and diversity of products/price points to support a potential new/expanded Multi-Use Sports Facility development. As would be detailed under the site/location analysis in the study's potential Phase Two, facility/complex sites that are accessible to hotel supply within 15 to 20-minute drive time are normally preferable.

Non-local tournament, meet and competition organizers and participants can focus, in part, on the appeal of a destination when making a decision on whether to attend. The variety and number of attractions available throughout Eugene and Springfield may serve as a foundation on which to increase the economic benefits associated with increased non-local attendance at tournaments, meets and competitions held at potential new amateur and recreational sports facilities in Eugene and Springfield. Overall, the Eugene-Springfield area's array of attractions and general destination appeal is considered to be relatively strong for a community its size, with the destination's greatest strengths lying in its accessibility, affordability and affiliation with the University of Oregon.

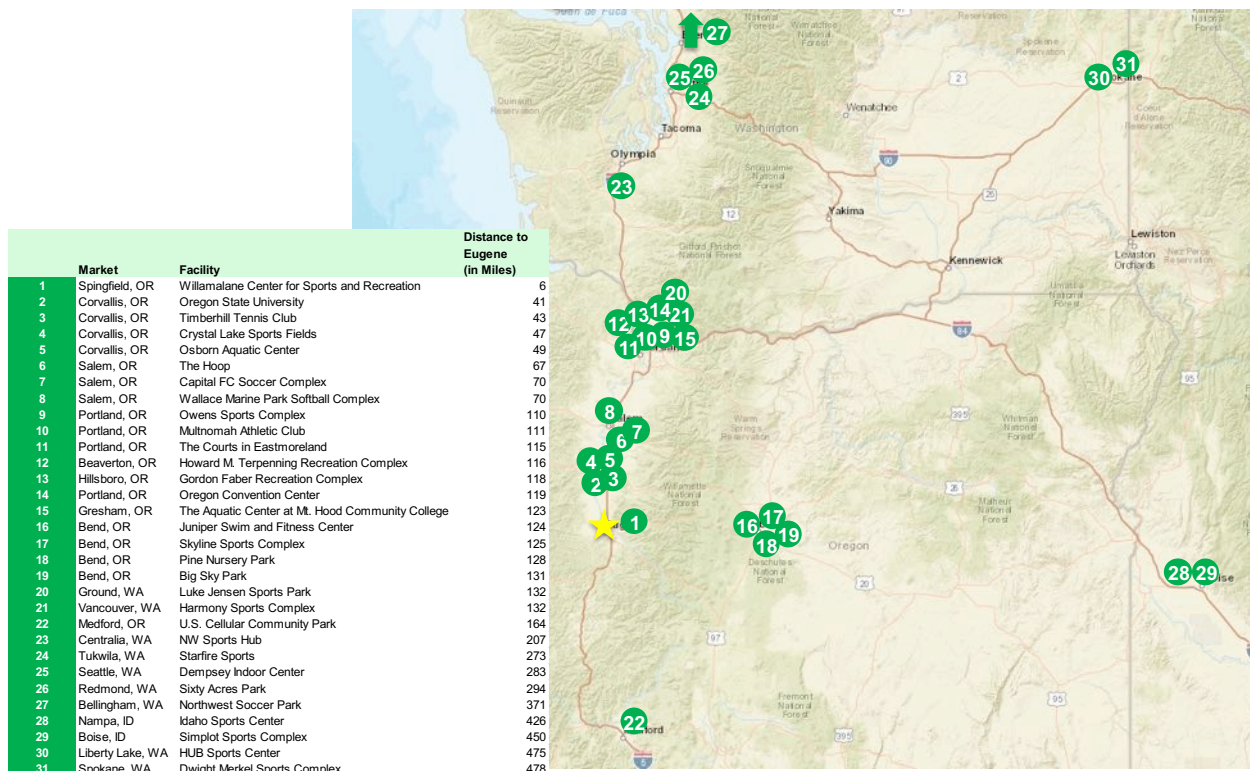
### 3.0 COMPETITIVE AND COMPARABLE FACILITIES

This chapter provides an analysis of various physical characteristics and resources of both competitive and comparable facilities and communities. The data helps place Eugene-Springfield Multi-Use Sports Facilities within a competitive and comparable market context with respect to facility offerings, demographics and other related destination features. A set of competitive facilities throughout the state and region as well as comparable facilities throughout the country were identified and analyzed to obtain insight into the physical and operational characteristics of facilities located in competitive and comparable communities.

#### Competitive Facilities

In addition to the existing facilities located in Eugene-Springfield, facilities located throughout the state and surrounding region were also reviewed as these facilities are likely to generate the most competition with potential new Multi-Use Sports Facilities in Eugene-Springfield. Several of these facilities have been mentioned by local sports organizations and stakeholders as principal sports complexes in the area. Exhibit 1 on the following page outlines the identified major competitive facilities, their respective location and distance from the Eugene-Springfield.

**Exhibit 1**  
**Competitive Facilities**





As shown in the previous exhibit, there are more than 30 facilities within approximately 500 miles of Eugene-Springfield that may offer some type of competition to potential Multi-Use Sports Facilities in Eugene-Springfield. Exhibit 2 summarizes the type and facility offerings among the identified competitive facilities sorted by distance from Eugene-Springfield.

**Exhibit 2**  
**Summary of Potential Competitive Facilities (By Distance from Eugene-Springfield)**

Facility	Location	Distance (1)	Type	Basketball	Soccer	Baseball	Softball	Tennis	Aquatic	Indoor Track	Other
Willamalane Center for Sports and Recreation	Springfield, OR	6	In/Out	11	4	-	2	-	-	-	
Oregon State University	Corvallis, OR	41	In/Out	2	2	-	-	-	-	-	(2)
Timberhill Tennis Club	Corvallis, OR	43	In/Out	-	-	-	-	8	-	-	-
Crystal Lake Sports Fields	Corvallis, OR	47	Out	-	8	9	-	-	-	-	-
Osborn Aquatic Center	Corvallis, OR	49	In/Out	-	-	-	-	-	50m	-	-
The Hoop	Salem, OR	67	In	6	-	-	-	-	-	-	-
Capital FC Soccer Complex	Salem, OR	70	Out	-	10	-	-	-	-	-	-
Wallace Marine Park Softball Complex	Salem, OR	70	Out	-	-	-	5	-	-	-	-
Owens Sports Complex	Portland, OR	110	Out	-	9	-	7	-	-	-	-
Multnomah Athletic Club	Portland, OR	111	In	2	-	-	-	9	50m	-	(3)
The Courts in Eastmoreland	Portland, OR	115	In/Out	6	-	-	-	4	-	-	(4)
Howard M. Terpenning Recreation Complex	Beaverton, OR	116	In/Out	10	5	2	5	15	50m	-	(5)
Gordon Faber Recreation Complex	Hillsboro, OR	118	Out	-	-	-	6	-	-	-	(6)
Oregon Convention Center	Portland, OR	119	In	22	-	-	-	-	-	-	(7)
The Aquatic Center at Mt. Hood Community College	Gresham, OR	123	In/Out	-	-	-	-	-	50m	-	-
Juniper Swim and Fitness Center	Bend, OR	124	In/Out	-	-	-	-	-	50m	-	(8)
Skyline Sports Complex	Bend, OR	125	Out	-	-	-	4	-	-	-	-
Pine Nursery Park	Bend, OR	128	Out	-	3	-	4	-	-	-	-
Big Sky Park	Bend, OR	131	Out	-	5	1	1	-	-	-	-
Luke Jensen Sports Park	Ground, WA	132	Out	-	3	2	-	-	-	-	(9)
Harmony Sports Complex	Vancouver, WA	132	Out	-	10	9	1	-	-	-	-
U.S. Cellular Park	Medford, OR	164	Out	-	5	5	5	-	-	-	-
NW Sports Hub	Centralia, WA	207	In	8	2	1	1	-	-	-	-
Starfire Sports	Tukwila, WA	273	In/Out	-	14	-	-	-	-	-	-
Dempsey Indoor Center	Seattle, WA	283	In	-	1	-	-	-	-	307m	-
Sixty Acres Park	Redmond, WA	294	Out	-	25	-	-	-	-	-	-
Northwest Soccer Park	Bellingham, WA	371	Out	-	12	-	-	-	-	-	-
Idaho Sports Center	Nampa, ID	426	In	-	-	-	-	-	-	200m	-
Simplot Sports Complex	Boise, ID	450	Out	-	20	13	2	-	-	-	-
HUB Sports Center	Liberty Lake, WA	475	In	5	-	-	-	-	-	-	-
Dwight Merkel Sports Complex	Spokane, WA	478	Out	-	8	1	5	-	-	-	(10)

(1) Distance in miles from Eugene

(2) Stadiums: 46,000-seat football, 9,600-seat basketball, 3,250-seat

(3) one 84-ft pool w/ adjustable floors, rock climbing gym, 10 har

(4) Six outdoor sand volleyball courts

(5) 50-m pool with 10 lanes, roller hockey, 2 skate parks

(6) 7,000-seat Hillsboro Stadium (soccer), 4,500-seat Ron Tonkir

(7) Can accommodate a 200-meter banked indoor track

(8) one 25-yd six-lane indoor pool

(9) one 25-yd indoor pool

(10) BMX Track

Among the 31 identified competitive facilities, there are nearly 90 triangle fields, 145 rectangle fields, over 40 indoor courts five major aquatic facilities and three major indoor track facilities. The majority of the facilities are located along Interstate 5 north of Eugene-Springfield which stretches the entirety of the west coast, connecting Canada to Mexico.

Eugene-Springfield's ability to attract state, regional, and national tournaments will be largely dependent on the competitive landscape in the greater Oregon area. A baseball/softball complex often must offer a minimum of 10 fields, assuming at least seven of those fields are consistent in the type of infield (dirt versus grass). A soccer complex often must offer at least eight full-sized fields or 14 fields that are a mix of youth-sized and full-sized in order to be considered viable for a large tournament.

The largest number of indoor and outdoor facilities are concentrated in the greater Salem, Portland and Seattle areas. The vast number of fields, partnered with the hotel inventory support of a large metropolitan area, will create high levels of competition statewide to host large-scale soccer tournaments. Case studies on the reviewed competitive case studies can be found in Appendix C of this report.

## **Comparable Facilities**

The purpose of this section is to present an analysis related to comparable sports complexes around the country. An assessment of the physical and operational characteristics of comparable sports facilities is a critical component in assessing the market potential of new Multi-Use Sports Facilities in Eugene-Springfield. Comparable facilities were identified based on discussions with project representatives, sports tournament organizers and our knowledge of the industry. The analysis of similar sports facilities provides general informational background and a programmatic perspective from which to assess potential event activity at potential new Multi-Use Sports Facilities in Eugene-Springfield. Our analysis is broken down by facility type and includes facilities with triangle fields, rectangle fields, indoor courts, indoor tracks and indoor aquatic facilities.

While some of these case studies depict complexes that are either larger in scope or located in larger markets, they were included as they are believed to be instructive of industry best practices in terms of program or operating attributes. For instance, the Armory in New York was mentioned repeatedly by national track and field representatives as industry best practices example, while the Terpenning Recreation Complex was included due to its multi-faceted facilities (outdoor and indoor) and its ownership structure (it is owned and operated by the Tualatin Hills Parks and Recreation Department). Whenever possible, attempts have been made to cast the comparable facility case studies in terms of "apples-to-apples"; however, no two facilities provide identical performance data and a number of facilities were unwilling or unable to share information of sufficient detail that would allow for an identical comparison format. A mix of quantitative and qualitative information is presented for each facility that highlights similarities, differences, strengths, weaknesses, and noteworthy items/issues relating to individual facilities. More detailed case studies of comparable facilities can be found in Appendix D.

Additionally, a comparative demographic analysis was conducted of each of the markets hosting the identified comparable facilities. While many of the comparable facilities identified for this study are helpful to consider in terms of their industry best practices approach to facility product and/or operations, some are situated in large metropolitan areas that are not appropriate to consider in a demographic comparison. Therefore, the demographic analysis presented within this chapter focuses on comparable facility "peer" markets that have populations within a 30-minute drive of less than one million persons (resulting in the exclusion of several of the largest comparable facility cities within each set of analysis charts. Complete demographic data associated with both the "peer" comparable facility markets, as well as statistics related to the remaining larger markets are provided in full within Appendix E at the conclusion of this report.

## Triangle Field Facilities

We have identified 16 comparable facilities throughout the country that offer triangle fields. Exhibit 3 summarizes the comparable facilities and markets evaluated.

**Exhibit 3**  
**Summary of Comparable Triangle Field Facilities**

Facility	City	Year Opened	Const. Cost (in millions)	Number of Triangle Fields
Grand Park	Westfield, IN	2014	\$49.0	28
Old Settlers Park	Round Rock, TX	1990	N/A	25
Legacy Park Sports Complex	Lee Summit, MO	1997	N/A	24
Blue Valley Recreation Complex	Overland Park, KS	1981	N/A	24
Energy Capital Sports Complex	Gillette, WY	2015	\$16.2	23
Mid America Sports Complex	Shawnee Mission, KS	1994	N/A	22
Legacy Park	Lee's Summit, MO	1997	N/A	16
Simplot Sports Complex	Boise, ID	1995	N/A	15
Elizabeth Town Sports Park	Elizabethtown, KY	2012	\$31.0	12
Chappapeela Sports Park	Hammond, LA	2013	\$17.0	12
U.S. Cellular Community Park	Medford, OR	2007	\$32.0	10
Plano Sports Authority StarCenter	Plano, TX	2002	\$10.8	8
Harmony Sports Complex	Vancouver, WA	N/A	N/A	7
Howard, M. Terpenning Recreation Complex	Beaverton, OR	1978	N/A	7
City of Redding Sports Complex	Redding, CA	2004	\$10.0	5
RecPlex	Branson, MO	2005	\$12.9	4

Construction cost figures include the total construction cost of each facility and may include the costs associated with other facility components such as indoor courts, rectangle fields, parking and facility infrastructure. As shown in the previous exhibit, eight of the 16 comparable outdoor complexes have opened within the last 15 years, averaging \$22.4 million in construction costs. Comparable facilities that offer triangle fields average approximately 15 fields per facility, ranging from a low of four to a high of 28.

Exhibit 4 below illustrates Eugene-Springfield's rank among comparable markets (excluding markets with populations of more than 1.0 million within a 30-minute drive) that offer triangle fields regarding demographic metrics such as population, average household income, median age, and overall corporate base (in terms of number of companies).

**Exhibit 4**  
**Comparable Triangle Field Facility Demographic Summary**

	Comparable Peer Markets				Eugene, OR		
	Low	High	Average	Median	Estimate	% of Avg.	Rank (out of 11)
<b>Population</b>							
30-Minute Drive	45,400	853,400	343,900	343,900	316,200	92%	5
90-Minute Drive	87,800	2,916,500	1,540,600	2,189,500	1,002,100	65%	6
180-Minute Drive	418,100	14,320,800	4,965,100	4,965,100	4,024,000	81%	6
<b>Average Household Income</b>							
30-Minute Drive	\$53,400	\$94,800	\$69,600	\$69,400	\$59,000	85%	10
90-Minute Drive	\$54,000	\$76,600	\$65,500	\$65,500	\$61,300	94%	8
180-Minute Drive	\$54,800	\$73,900	\$64,700	\$65,100	\$71,200	110%	3
<b>Median Age</b>							
30-Minute Drive	7.0	42.6	37.8	36.9	37.7	100%	7
90-Minute Drive	7.0	44.9	38.1	37.3	38.0	100%	7
180-Minute Drive	10.0	42.5	38.0	37.8	38.8	102%	10
<b>Corporate Base</b>							
30-Minute Drive	2,200	35,900	15,600	10,800	15,200	97%	5
90-Minute Drive	4,600	118,900	63,800	61,500	43,000	67%	6
180-Minute Drive	4,600	118,900	201,700	174,000	178,900	89%	6

Source: Esri, 2016

The chart above provides a summary of demographic data from 11 peer market comparable triangle field facilities around the country. Demographic data was collected for a 30-, 90- and 180-minute drive from the respective facilities. Eugene-Springfield's information is included as a means of comparing current local market conditions to the low, high, average, and median population, average household income, median age and corporate base statistics of the markets offering comparable outdoor facilities. As shown, the markets reviewed offering facilities with triangle fields have a 30-minute drive population base ranging from a low of 45,400 to a high of 853,400, with an average of 343,900. This range increases to between 87,800 and over 2.9 million within a 90-minute drive of comparable facilities, with an average population base of 1.5 million. Eugene-Springfield's 30- and 90-minute drive population levels of 316,200 and 1.0 million people, respectively, rank near the middle among the respective comparable markets. Due to the proximity to the Portland area, Eugene-Springfield's 180-minute drive population of 4.0 million accounts for 81 percent of the average 5.0 million among comparable markets offering facilities with triangle fields.

The comparable facilities identified for this study effort were selected based on one or more market or facility attributes that would be expected to be comparable to a potential new sports facility project in Eugene-Springfield, from which important inferences and insight can be drawn. The comparable facilities illustrate a diversity of approaches to product development and operations. Likewise, each possesses unique market demand and user group activity that similarly influences ultimate financial and economic performance.



Exhibit 5 presents a summary comparison of selected comparable triangle field complexes, highlighting key physical and operational characteristics and performance highlights.

**Exhibit 5**  
**Selected Comparable Triangle Field Facility Comparison**

	U.S. Cellular Community Park	Grand Park	Legacy Park	Owens Sports Complex	Gordon Faber Recreation Complex
City, State	Medford, OR	Westfield, IN	Lee's Summit, MO	Portland, OR	Hillsboro, OR
Year Opened	2005	2014	1997	1997 (land acquired)	1999
Owner	City of Medford	City of Westfield	Lee's Summit Parks and Recreation	Portland Parks and Recreation	City of Hillsboro
Operator	Medford Parks and Recreation Department	Indiana Bulls, Indiana Sports Properties	Lee's Summit Parks and Recreation	Portland Metro Softball Association	Hillsboro Parks and Recreation
Construction Cost	\$32 million	\$49 million	N/A	N/A	\$10 million • \$7.5 million for Hillsboro Stadium • \$2.5 million for softball fields
Funding for Construction	<ul style="list-style-type: none"> <li>• Issuing bonds</li> <li>• Transient lodging tax</li> <li>• Park utility fees</li> <li>• Car rental taxes</li> </ul>	<ul style="list-style-type: none"> <li>• TIF</li> <li>• Sponsorship revenues</li> <li>• City infrastructure fund</li> </ul>	<ul style="list-style-type: none"> <li>• 3/8 cent sales tax</li> </ul>	<ul style="list-style-type: none"> <li>• General obligation bonds</li> <li>• Private foundation</li> </ul>	<ul style="list-style-type: none"> <li>• City funding</li> <li>• Urban renewal district</li> </ul>
Acreage	132 acres	400 acres	692 acres	95 acres	90 acres
Field Inventory	<ul style="list-style-type: none"> <li>• 3 full-sized baseball fields</li> <li>• 7 baseball/softball fields</li> <li>• 6 multi-purpose fields</li> </ul>	<ul style="list-style-type: none"> <li>• 26 baseball/softball fields</li> <li>• 31 soccer fields</li> </ul>	<ul style="list-style-type: none"> <li>• 12 natural grass soccer fields</li> <li>• 8 softball fields</li> <li>• 3 multipurpose fields</li> </ul>	<ul style="list-style-type: none"> <li>• 7 softball fields</li> <li>• 9 soccer fields (4 with artificial turf)</li> </ul>	<ul style="list-style-type: none"> <li>• 6 natural grass softball fields</li> </ul>
Operating Profit/Loss	(\$300,000)	N/A	(\$54,900)	N/A	\$94,600 (2016-17 budget)
Public Subsidy	Yes	No	Yes	N/A	No
Facility Usage	<ul style="list-style-type: none"> <li>• 44 tournaments in 2014</li> <li>• 750 non-local teams</li> <li>• 68% weekend occupancy</li> </ul>	<ul style="list-style-type: none"> <li>• 75 tournaments in 2015</li> <li>• 650,000 overnight visitors</li> </ul>	<ul style="list-style-type: none"> <li>• 25 tournaments</li> <li>• 13 triangle, 2 rectangle</li> </ul>	<ul style="list-style-type: none"> <li>• Hosted 3,316 baseball/softball all league games in 2015</li> <li>• Hosted 352,900 attendees</li> <li>• Hosted 38 tournaments (12 youth, 16 adult)</li> </ul>	<ul style="list-style-type: none"> <li>• Hosted 372 events in 2015</li> <li>• Officials could not breakdown this figure of 372 by event type</li> </ul>
Learning Points	<ul style="list-style-type: none"> <li>• Multi-phased development approach</li> <li>• Fully turf facility</li> <li>• Comparable market to Eugene</li> </ul>	<ul style="list-style-type: none"> <li>• Significant economic impact</li> <li>• Strong base of local support</li> </ul>	<ul style="list-style-type: none"> <li>• Synergistic mix of local recreation assets and tournament quality facilities</li> </ul>	<ul style="list-style-type: none"> <li>• Limited amount of tournament quality softball fields</li> </ul>	<ul style="list-style-type: none"> <li>• Major interstate access</li> <li>• Comparable market to Eugene-Springfield</li> </ul>

## Rectangle Field Facilities

We have identified 21 rectangle field facilities throughout the country that are, in some way comparable to Eugene-Springfield. Exhibit 6 below summarizes the facilities and their respective offerings.

**Exhibit 6**  
**Summary of Comparable Rectangle Field Facilities**

Facility	City	Year Opened	Const. Cost (in millions)	Number of Soccer Fields
Grand Park	Westfield, IN	2014	\$49.0	31
Sixty-Acres Park	Redmond, WA	N/A	N/A	25
Discovery Sports Center/MD SoccerPlex	Germantown, MD	2000	\$22.1	24
Chappapeela Sports Park	Hammond, LA	2013	\$17.0	21
Simplot Sports Complex	Boise, ID	1995	N/A	20
Ethel S. Abbott Sports Complex	Lincoln, NE	1993	\$5.8	20
Fieldhouse USA	Frisco, TX	2009	\$17.5	17
Plano Sports Authority StarCenter	Plano, TX	2002	\$10.8	14
Legacy Park Sports Complex	Lee Summit, MO	1997	N/A	12
The Turf	Frederica, DE	2016	\$24.0	12
Elizabeth Town Sports Park	Elizabethtown, KY	2012	\$31.0	10
Harmony Sports Complex	Vancouver, WA	N/A	N/A	9
Rocky Top Sports World	Gatlinburg, TN	2014	\$20.0	8
Old Settlers Park	Round Rock, TX	2007	N/A	7
U.S. Cellular Community Park	Medford, OR	2007	\$32.0	6
City of Redding Sports Complex	Redding, CA	2004	\$10.0	5
Howard, M. Terpenning Recreation Complex	Beaverton, OR	1978	N/A	5
Greensboro Sportsplex	Greensboro, NC	2002	\$6.0	4
Libertyville Sports Complex	Libertyville, IL	2002	\$27.0	2
Mid America Sports Complex	Shawnee Mission, KS	1994	N/A	2
RecPlex	Branson, MO	2005	\$12.9	2

As presented, 14 of the comparable facilities have opened within the last 15 years. Construction costs among comparable indoor facilities range from a low of \$6.0 million to a high of \$49.0 million, averaging approximately \$20.4 million in total development costs. The average facility offers 12 full-sized rectangle fields. Additionally, all but one facility is considered to be multi-sport, offering more than one sport-type component.

Exhibit 7 on the following page summarizes the populations, average household incomes, median age and corporate bases among the 15 comparable markets (excluding markets with populations of more than 1.0 million within a 30-minute drive) relative to the demographic metrics of Eugene-Springfield.

**Exhibit 7**  
**Comparable Rectangle Field Facility Demographic Summary**

	Comparable Peer Markets				Eugene, OR		
	Low	High	Average	Median	Estimate	% of Avg.	Rank (out of 15)
<b>Population</b>							
30-Minute Drive	34,000	853,400	369,900	268,300	316,200	85%	7
90-Minute Drive	333,900	8,526,900	2,317,000	2,159,800	1,002,100	43%	11
180-Minute Drive	970,500	23,151,900	7,912,200	5,536,200	4,024,000	51%	10
<b>Average Household Income</b>							
30-Minute Drive	\$53,400	\$135,000	\$71,900	\$68,000	\$59,000	82%	13
90-Minute Drive	\$54,000	\$109,300	\$69,700	\$66,500	\$61,300	88%	11
180-Minute Drive	\$54,800	\$95,100	\$68,300	\$65,100	\$71,200	104%	5
<b>Median Age</b>							
30-Minute Drive	33.9	43.2	38.3	37.7	37.7	98%	8
90-Minute Drive	34.8	44.9	38.4	37.8	38.0	99%	8
180-Minute Drive	35.2	42.5	38.2	37.9	38.8	102%	13
<b>Corporate Base</b>							
30-Minute Drive	3,200	35,900	16,700	13,600	15,200	91%	7
90-Minute Drive	17,200	339,400	95,400	93,200	43,000	45%	11
180-Minute Drive	41,800	931,000	319,000	243,300	178,900	56%	10

Source: Esri, 2016

As presented, the population of comparable markets varies widely. Within a 30-minute drive of comparable rectangle field facilities the population base ranges from 34,000 to 853,400, with an average of 396,900 which closely compares to the population base within a 30-minute drive of Eugene-Springfield. These demographic benchmarking metrics within 30-, 90- and 180- drives of Eugene-Springfield generally rank between the middle and lower end relative to the average drive time population bases of comparable markets that offer rectangle fields.

Exhibit 8 presents a summary comparison of selected comparable rectangle field complexes, highlighting key physical and operational characteristics and performance highlights.

**Exhibit 8**  
**Selected Comparable Rectangle Field Facility Comparison**

	Scheels Overland Park Soccer Complex	Chappapeela Sports Park	Elizabethtown Sports Park	Capital FC Soccer Complex
City, State	Overland Park, KS	Hammond, LA	Elizabethtown, KY	Salem, OR
Year Opened	2009	2013	2012	N/A
Owner	City of Overland Park	Hammond Area Recreation District No. 1	City of Elizabethtown	Capital Futbol Club
Operator	City of Overland Park	Hammond Area Recreation District No. 1	City of Elizabethtown	Capital Futbol Club
Construction Cost	\$36 million	\$17 million	\$31 million	N/A
Funding for Construction	<ul style="list-style-type: none"> <li>General bond secured by a hotel tax increase of 3% (from 6% to 9%)</li> </ul>	<ul style="list-style-type: none"> <li>15-year ad valorem tax</li> </ul>	<ul style="list-style-type: none"> <li>2% City restaurant tax</li> <li>\$1.7 million in surplus funding reserved for capital improvements</li> </ul>	<ul style="list-style-type: none"> <li>Privately funded</li> </ul>
Acreage	96 acres	90 acres	150 acres	37 acres
Field Inventory	<ul style="list-style-type: none"> <li>12 lighted, full-sized turf fields</li> </ul>	<ul style="list-style-type: none"> <li>21 soccer fields</li> <li>6 baseball fields</li> <li>6 softball fields</li> <li>2 football fields</li> </ul>	<ul style="list-style-type: none"> <li>12 baseball/softball fields</li> <li>10 multi-purpose grass fields</li> <li>2 synthetic turf championship rectangle fields</li> </ul>	<ul style="list-style-type: none"> <li>10 natural grass fields</li> <li>6 full-sized fields</li> <li>3 U-8 to U-9 fields</li> <li>1 U-10 to U-11 Field</li> </ul>
Operating Profit/Loss	\$1,282,900	(\$1,230,000)	(\$977,800)	(20,000) (average)
Public Subsidy	No	Yes	Yes	No, subsidized by Club membership fees
Facility Usage	<ul style="list-style-type: none"> <li>20 tournaments in 2014</li> <li>176,000 league and tournament visitors</li> <li>702,000 spectators</li> <li>118,000 weekday participants</li> </ul>	<ul style="list-style-type: none"> <li>36 tournaments in 2015 (29 baseball/softball, 7 soccer)</li> <li>Only 7 unbooked weekends per year</li> </ul>	<ul style="list-style-type: none"> <li>50 major events annually</li> <li>20 tournaments per year (average)</li> </ul>	<ul style="list-style-type: none"> <li>15,000 athletes use fields per week</li> <li>200,000 unique visitors per year</li> </ul>
Learning Points	<ul style="list-style-type: none"> <li>Ample parking onsite</li> <li>Operationally self-sustaining</li> </ul>	<ul style="list-style-type: none"> <li>Moderate cost to develop (all grass)</li> <li>High overall maintenance costs</li> </ul>	<ul style="list-style-type: none"> <li>Mix of grass and synthetic fields</li> <li>Draws from distant mid-major metropolitan market (Louisville)</li> </ul>	<ul style="list-style-type: none"> <li>Low cost to develop</li> <li>Run by local club (501(c)3 with 2,000 athletes)</li> <li>Small footprint</li> </ul>



## Indoor Court Facilities

We have identified 19 comparable facilities that offer indoor basketball and/or volleyball courts throughout the country. Exhibit 9 provides a summary comparison of the facility offerings at the selected comparable facilities including year opened, construction costs and number of basketball courts.

**Exhibit 9**  
**Summary of Comparable Indoor Court Facilities**

Facility	City	Year Opened	Const. Cost (in millions)	Number of Basketball Courts
Plano Sports Authority StarCenter	Plano, TX	2002	\$10.8	14
Fieldhouse USA	Frisco, TX	2009	\$17.5	12
Rocky Top Sports World	Gatlinburg, TN	2014	\$20.0	12
Ethel S. Abbott Sports Complex	Lincoln, NE	1993	\$5.8	11
Sanford Pentagon	Sioux Falls, SD	2013	\$19.0	9
Boo Williams Sportsplex	Hampton, VA	2008	\$13.5	8
Discovery Sports Center/MD SoccerPlex	Germantown, MD	2000	\$22.1	8
Grand Park	Westfield, IN	2014	\$49.0	8
Greensboro Sportsplex	Greensboro, NC	2002	\$6.0	8
Libertyville Sports Complex	Libertyville, IL	2002	\$27.0	8
Myrtle Beach Sports Center	Myrtle Beach, SC	2015	\$13.8	8
Spiece Fieldhouse	Fort Wayne, IN	2001	N/A	8
Sports Pavilion Lawrence	Lawrence, KS	2014	\$24.5	8
Howard, M. Terpenning Recreation Complex	Beaverton, OR	1978	N/A	6
Round Rock Sports Center	Round Rock, TX	2014	\$14.5	6
St. Peters Recplex	St. Peters, MO	1994	\$18.5	3
Reggie Lewis Track and Athletic Center	Roxbury Crossing, MA	1995	\$17.0	3
RecPlex	Branson, MO	2005	\$12.9	2
Chappapeela Sports Park	Hammond, LA	2013	\$17.0	2

Comparable indoor court facilities offer an average of eight full-sized basketball courts. More than 80 percent of the select comparable indoor court facilities have opened within the past 15 years, seven of which have opened within the past three years. Total facility construction costs range from a low of approximately \$5.8 million to a high of just under \$50.0 million.

Exhibit 10 compares various demographic and socioeconomic characteristics among comparable markets supporting venues with indoor courts (excluding markets with populations of more than 1.0 million within a 30-minute drive) to help gain an understanding of the relative strength of the Eugene-Springfield market area.

**Exhibit 10**  
**Comparable Indoor Court Facility Demographic Summary**

	Comparable Peer Markets				Eugene, OR		
	Low	High	Average	Median	Estimate	% of Avg.	Rank (out of 15)
<b>Population</b>							
30-Minute Drive	34,000	994,300	439,200	235,700	316,200	72%	8
90-Minute Drive	603,800	10,498,100	3,116,500	1,428,700	1,002,100	32%	12
180-Minute Drive	1,002,100	18,469,600	8,084,400	4,587,700	4,024,000	50%	11
<b>Average Household Income</b>							
30-Minute Drive	\$53,400	\$135,000	\$75,900	\$67,900	\$59,000	78%	12
90-Minute Drive	\$53,500	\$109,300	\$70,000	\$68,000	\$61,300	88%	11
180-Minute Drive	\$54,800	\$92,900	\$66,100	\$64,900	\$71,200	108%	3
<b>Median Age</b>							
30-Minute Drive	33.7	43.4	37.9	37.3	37.7	99%	9
90-Minute Drive	35.7	42.7	38.0	37.2	38.0	100%	9
180-Minute Drive	36.5	41.7	38.0	37.8	38.8	102%	13
<b>Corporate Base</b>							
30-Minute Drive	3,200	42,900	19,400	16,700	15,200	78%	9
90-Minute Drive	31,100	425,800	126,700	106,100	43,000	34%	12
180-Minute Drive	43,000	735,700	324,200	227,700	178,900	55%	11

Source: Esri, 2016

As presented, the population of comparable markets varies widely. Within a 30-minute drive of comparable indoor courts facilities the population base ranges from 34,000 to more than 994,300, with an average of 439,200 which places Eugene-Springfield near the midpoint of the comparable peer markets. The population base within 30-, 90- and 180- drives of Eugene-Springfield ranks between the middle and lower quartile relative to the comparable set.

Exhibit 11 presents a summary comparison of selected indoor court facilities, highlighting key physical and operational characteristics and performance highlights.

**Exhibit 11**  
**Selected Comparable Indoor Court Facility Comparison**

	Sports Pavilion Lawrence	Greensboro Sportsplex	Round Rock Sports Center	The Hoop
City, State	Lawrence, KS	Greensboro, NC	Round Rock, TX	Salem, OR
Year Opened	2014	2002	2014	2006 (existing building purchased by the Hoop)
Owner	City of Lawrence	Greensboro Parks and Recreation Department	City of Round Rock	The Hoop
Operator	City of Lawrence	Greensboro Parks and Recreation Department	City of Round Rock	The Hoop
Construction Cost	\$24.5 million	\$6.0 million	\$14.5 million	N/A
Funding for Construction	<ul style="list-style-type: none"> <li>\$22.5 million from City of Lawrence</li> <li>\$2.0 million from private foundation</li> </ul>	<ul style="list-style-type: none"> <li>General obligation bonds supported by property taxes</li> </ul>	<ul style="list-style-type: none"> <li>\$7.5 million from city-issued hotel revenue bond</li> <li>2% increase in hotel occupancy tax</li> </ul>	<ul style="list-style-type: none"> <li>Privately funded (constructed by previous owning entity)</li> </ul>
Square Feet	181,000 sf	106,000 sf	82,800 sf	51,000 square feet
Court Inventory	<ul style="list-style-type: none"> <li>8 regulation-sized basketball courts/16 volleyball courts</li> </ul>	<ul style="list-style-type: none"> <li>8 full-sized basketball courts</li> <li>4 indoor soccer fields</li> </ul>	<ul style="list-style-type: none"> <li>6 full-sized basketball courts</li> </ul>	<ul style="list-style-type: none"> <li>6 full-sized basketball courts, 12 volleyball courts</li> </ul>
Operating Profit/Loss	\$300,500 in operational revenue	(\$150,000)	(\$978,000)	Profit (undisclosed)
Public Subsidy	N/A	Yes	Yes	No
Facility Usage	In 2014: <ul style="list-style-type: none"> <li>16 basketball tournaments</li> <li>6 basketball camps</li> <li>13 volleyball tournaments</li> <li>One futsal tournament</li> </ul>	<ul style="list-style-type: none"> <li>Average of 45 basketball tournaments per year</li> <li>12 to 15 volleyball tournaments per year</li> </ul>	<ul style="list-style-type: none"> <li>40 total tournaments</li> <li>17 volleyball tournaments</li> <li>14 basketball tournaments</li> </ul>	<ul style="list-style-type: none"> <li>Hosts tournaments every weekend from September through July</li> <li>Hosts 10 150-team basketball tournaments per year</li> <li>12 to 20 24-team volleyball tournaments per year</li> <li>Gym booked 3pm to 10pm every weeknight from October through July</li> </ul>
Learning Points	<ul style="list-style-type: none"> <li>College/city partnership</li> <li>Integration with University facilities</li> </ul>	<ul style="list-style-type: none"> <li>Comparable city size to Eugene-Springfield</li> </ul>	<ul style="list-style-type: none"> <li>Low cost to develop</li> <li>Major interstate access to proximate college city (Austin)</li> </ul>	<ul style="list-style-type: none"> <li>Comparable and competitive market with Eugene-Springfield</li> <li>Profitable facility</li> <li>Substantial inventory of large basketball tournaments</li> </ul>

## Indoor Aquatic Facilities

We have identified and selected ten comparable natatorium complexes that each offer at least one 50-meter competition pool throughout the country. Exhibit 12 provides comparisons of the facility offerings at the selected comparable facilities including year opened, construction costs, the number of lanes and the other types of pools that are housed onsite (if any).

**Exhibit 12**  
**Summary of Comparable Indoor Aquatic Facilities**

Aquatic Center	Location	Year	Const. Cost (in millions)	50M Pool	# Lanes	Additional Pool
		Opened / Renovated				
Capitol Federal Natatorium	Topeka, KS	2010	\$3.2	Yes	8	Yes
Lawrence Aquatic Center	Lawrence, KS	2001	\$9.5	Yes	10	Rec
Lee and Joe Jamail Texas Swimming Center	Austin, TX	1977	N/A	Yes	8	No
Mecklenburg County Aquatic Center	Charlotte, NC	1991	N/A	Yes	10	25Y
Osborn Aquatic Center	Corvallis, OR	2000	\$8.2	Yes	8	No
San Antonio Natatorium	San Antonio, TX	2013	\$0.4	Yes	8	No
SPIRE Institute	Geneva, OH	2011	N/A	Yes	10	25Y
St. Peters Rec Plex	St. Peters, MO	2007	\$18.5	Yes	6	Rec
Tualatin Hills Aquatic Center	Beaverton, OR	1978	N/A	Yes	10	No
Weyerhaeuser King County Aquatic Center	Federal Way, WA	1990	\$13.5	Yes	8	Rec

As shown, seven of the ten facilities have opened since 2000, three of which (Capitol Federal Natatorium in Topeka, Kansas, San Antonio Natatorium, and SPIRE Institute in Geneva, Ohio) have opened within the last six years. Construction costs range from a low of \$0.4 million for the San Antonio Natatorium (for a significant renovation and expansion) to a high of \$18.5 million for the St. Peters Rec Plex in St. Peters, Missouri. Four of the ten facilities feature ten lanes, while six of the ten offer an additional onsite pool.

The Capitol Federal Natatorium is the only facility that features a second 50-meter pool. Additional pools are typically designated for recreational, warm-up, or instructional purposes. Notably, the Tualatin Hills Aquatic Center in Beaverton, Oregon and the Osborn Aquatic Center in Corvallis, Oregon do not offer second pools.



Exhibit 13 below compares the various demographic and socioeconomic characteristics among the markets that support the previously listed comparable indoor aquatic facilities (excluding markets with population of more than 1.0 million within a 30-minute drive).

**Exhibit 13**  
**Comparable Indoor Aquatic Facility Demographic Summary**

	Comparable Peer Markets				Eugene, OR		
	Low	High	Average	Median	Estimate	% of Avg.	Rank (out of 6)
<b>Population</b>							
30-Minute Drive	166,100	994,300	356,300	210,300	316,200	89%	2
90-Minute Drive	1,002,100	3,962,100	2,736,000	2,736,800	1,002,100	37%	6
180-Minute Drive	3,822,800	11,513,400	6,320,800	5,438,900	4,024,000	64%	5
<b>Average Household Income</b>							
30-Minute Drive	\$59,000	\$81,900	\$68,600	\$65,800	\$59,000	86%	6
90-Minute Drive	\$61,300	\$73,000	\$71,200	\$72,500	\$61,300	86%	6
180-Minute Drive	\$65,600	\$72,400	\$67,700	\$66,600	\$71,200	105%	2
<b>Median Age</b>							
30-Minute Drive	32.1	42.1	37.1	38.8	37.7	102%	3
90-Minute Drive	34.2	41.7	38.4	38.2	38.0	99%	3
180-Minute Drive	34.1	41.2	38.5	38.4	38.8	101%	4
<b>Corporate Base</b>							
30-Minute Drive	7,300	41,700	15,200	8,600	15,200	100%	2
90-Minute Drive	43,000	162,300	111,800	109,200	43,000	38%	6
180-Minute Drive	169,400	470,300	265,200	230,400	178,900	67%	5

Source: Esri, 2016

As shown, the population base within a 30-minute drive of comparable facilities averages approximately 356,300, with Eugene-Springfield ranking second among the set. With regard to the market areas captured within a 90-minute and 180-minute drive time, Eugene-Springfield ranks at or near the bottom among all drive markets.

Exhibit 14 presents a summary comparison of selected comparable indoor aquatic facilities, highlighting key physical and operational characteristics and performance highlights.

**Exhibit 14**  
**Selected Comparable Indoor Aquatic Facility Comparison**

	Greensboro Aquatic Center	Lawrence Aquatic Center	Weyerhaeuser King Aquatic Center	Osborn Aquatic Center
City, State	Greensboro, NC	Lawrence, KS	Federal Way, WA	Corvallis, OR
Year Opened	2011	2001	1990	1979 (opened) 2000 (renovated)
Owner	Greensboro Parks and Recreation Department	Lawrence Parks and Recreation	King County	Corvallis Parks and Recreation Department
Operator	Greensboro Parks and Recreation Department	Lawrence Parks and Recreation	King County	Corvallis Parks and Recreation Department
Construction Cost	\$19.0 million (includes \$3.2 million for land acquisition)	\$9.5 million	\$13.8 million	\$8.2 million (cost of renovation)
Funding for Construction	<ul style="list-style-type: none"> <li>\$12.0 million in general obligation bonds</li> <li>\$3.2 million in City funding for land acquisition</li> <li>Hotel motel tax to close deficit</li> </ul>	<ul style="list-style-type: none"> <li>Countywide one cent sales tax (adopted in 1994)</li> </ul>	<ul style="list-style-type: none"> <li>\$8.8 million County bond</li> <li>Land donated by Weyerhaeuser family</li> <li>\$5 million in private funding from Seattle Goodwill games</li> </ul>	<ul style="list-style-type: none"> <li>N/A</li> </ul>
Pool Inventory	<ul style="list-style-type: none"> <li>50-meter, 8-lane pool</li> <li>25-yard diving well</li> <li>Therapeutic pool</li> </ul>	<ul style="list-style-type: none"> <li>50-meter, 10-lane pool</li> <li>Separate recreation pool</li> </ul>	<ul style="list-style-type: none"> <li>50-meter, 8-lane pool</li> <li>2 bulkheads</li> <li>Separate recreation pool</li> </ul>	<ul style="list-style-type: none"> <li>50-meter, 8-lane pool</li> <li>1 bulkhead</li> <li>Therapy/analysis pool</li> </ul>
Operating Profit/Loss	Annual deficit (exact amount N/A)	(\$485,000)	(\$1,448,000)	(\$442,000)
Subsidy	Yes	Yes	Yes	Yes
Facility Usage	<ul style="list-style-type: none"> <li>45 to 50 swimming and/or diving events per year</li> <li>Home to 3 year round swimming clubs, 1 diving club, 4 high schools</li> <li>2 clubs use facilities 35 to 40 hours per week (7 to 8 lanes each)</li> </ul>	<ul style="list-style-type: none"> <li>Approximately 37 swim meets per year</li> <li>Local USA swim clubs host eight meets per year</li> <li>Approximately six high school meets per year</li> </ul>	<ul style="list-style-type: none"> <li>45 swim meets in a recent year</li> <li>20 club-hosted meets</li> <li>6 collegiate meets</li> <li>4 high school meets</li> <li>15 other/dive events"</li> <li>375,000 attendees in a recent year</li> </ul>	<ul style="list-style-type: none"> <li>Indoor and outdoor complexes attract 200,000 attendees annually</li> </ul>
Learning Points	<ul style="list-style-type: none"> <li>City-funded</li> <li>City-operated</li> <li>Significant economic impact</li> <li>Comparable market</li> </ul>	<ul style="list-style-type: none"> <li>Comparable market</li> <li>Strong local support</li> <li>Mix of serving local needs and generating economic impact</li> </ul>	<ul style="list-style-type: none"> <li>Pacific Northwest market</li> <li>Significant economic impact</li> <li>Substantial seating capacity (2,500)</li> <li>Strong local support</li> </ul>	<ul style="list-style-type: none"> <li>Oregon facility</li> <li>University market</li> </ul>

## Indoor Track Facilities

We have identified and selected eight comparable complexes that offer an indoor track throughout the country. Exhibit 15 provides comparisons of the facility offerings at the selected comparable facilities including year opened, construction costs, and the size and type of track within each facility.

**Exhibit 15**  
**Summary of Comparable Indoor Track Facilities**

Facility	City	State	Year Opened	Const. Cost (in millions)	Indoor Track
Balch Fieldhouse	Boulder, CO	CO	2015	N/A	300-m/Flat
Birmingham CrossPlex	Birmingham, AL	AL	2011	\$46.0	200-m/Banked
Dempsey Indoor Center	Seattle, WA	WA	2001	\$14.6	307-m/Flat
Jacksons Indoor Track	Nampa, ID	ID	2002	\$10.0	200-m/Banked
Randal Tyson Track Center	Fayetteville, AR	AR	2000	\$8.0	200-m/Banked
Reggie Lewis Track and Athletic Center	Roxbury Crossing, MA	MA	1995	\$17.0	200-m/Banked
The New Balance Track and Field Center	New York, NY	NY	1993	\$30.0	200-m/Banked
Vanderbilt Recreation and Wellness Center	Nashville, TN	TN	2014	\$30.0	300-m/Flat

As shown, six of the eight facilities have opened since 2000, two of which have opened within the last two years. Construction costs range from a low of \$8.0 million for the Randal Tyson Track Center in Fayetteville, Arkansas to a high of \$46.0 million for the state of the art Birmingham CrossPlex in Alabama. Five of the eight facilities feature banked 200-meter tracks while the Vanderbilt Recreation and Wellness Center in Nashville, the Dempsey Indoor Center in Seattle and the Balch Fieldhouse in Colorado offer 300-meter facilities.

It is important to note that banked 200-meter tracks that feature track surfacing by high quality manufacturer, "Mondo", are required by NCAA Division I events, and strongly preferred by other user groups as well. Based on cumulative data regarding funding, the 200-meter track facilities included in this analysis were 49 percent privately funded and 51 percent publicly funded. Notably, each of the 200-meter tracks feature six lanes. Each of the 300-meter facilities are able to house a full-sized indoor football field within their track, which enables these facilities to better serve as multi-use venues for soccer, lacrosse and football groups.

Exhibit 16 below compares the various demographic and socioeconomic characteristics among the markets that surround the previously listed comparable indoor track facilities (excluding markets with populations of more than 1.0 million within a 30-minute drive). This exercise helps develop an understanding of the demographic traits that typically support an indoor track venue, and demonstrates the Eugene-Springfield area's demographic and economic strengths (or deficiencies) relative to these other compared markets.

**Exhibit 16**  
**Comparable Indoor Track Facility Demographic Summary**

	Comparable Peer Markets				Eugene, OR		
	Low	High	Average	Median	Estimate	% of Avg.	Rank (out of 6)
<b>Population</b>							
30-Minute Drive	269,700	787,100	604,000	623,700	316,200	52%	5
90-Minute Drive	745,800	3,586,300	2,018,200	2,084,200	1,002,100	50%	5
180-Minute Drive	970,300	10,149,200	5,807,100	4,852,800	4,024,000	69%	5
<b>Average Household Income</b>							
30-Minute Drive	\$59,000	\$90,100	\$72,900	\$67,400	\$59,000	81%	6
90-Minute Drive	\$58,000	\$86,500	\$67,900	\$66,000	\$61,300	90%	5
180-Minute Drive	\$59,400	\$82,500	\$66,200	\$64,000	\$71,200	108%	2
<b>Median Age</b>							
30-Minute Drive	31.5	37.7	35.2	35.7	37.7	107%	5
90-Minute Drive	34.8	38.5	36.5	36.3	38.0	104%	5
180-Minute Drive	35.2	39.0	37.1	37.2	38.8	105%	5
<b>Corporate Base</b>							
30-Minute Drive	11,500	43,600	29,600	31,900	15,200	51%	5
90-Minute Drive	30,200	165,300	86,100	87,200	43,000	50%	5
180-Minute Drive	42,000	446,200	249,100	222,900	178,900	72%	5

Source: Esri, 2016

As shown, the population base within a 30-minute drive of comparable facilities ranges between 269,700 and 787,100, with an average of approximately 604,000. Among comparable market demographic metrics, Eugene-Springfield ranks at or near the bottom among all drive markets. Notably, the population and corporate base found within a 90-minute drive of Eugene-Springfield each make up only 50 percent of the comparable averages.



Exhibit 17 presents a summary comparison of selected comparable indoor track facilities, highlighting key physical and operational characteristics and performance highlights.

**Exhibit 17**  
**Selected Comparable Indoor Track Facility Comparison**

	Birmingham CrossPlex	Jacksons Indoor Track	The New Balance Track and Field Center	Reggie Lewis Track and Athletic Center
City, State	Birmingham, AL	Nampa, ID	New York, NY	Roxbury Crossing, MA
Year Opened	2011	2002	1993	1995
Owner	City of Birmingham	City of Nampa/Boise State University	The Armory Foundation	Roxbury Community College
Operator	City of Birmingham	Spectra	The Armory Foundation	Roxbury Community College
Construction Cost	\$46.0 million	\$10.0 million	\$30.0 million (renovation of armory)	\$17.0 million
Funding for Construction	<ul style="list-style-type: none"> <li>City-funded through sales tax increases and service bonds</li> </ul>	<ul style="list-style-type: none"> <li>\$2.5 million from city of Nampa</li> <li>\$7.5 million from Boise State and Jacksons Food Stores</li> </ul>	<ul style="list-style-type: none"> <li>20% publicly funded, 80% privately funded</li> </ul>	<ul style="list-style-type: none"> <li>Fully publicly funded</li> <li>Part of a 30+ year effort by state track coaches association to develop an indoor track</li> </ul>
Square Feet	75,000 sf	100,000 sf	60,000 sf	130,000 sf
Track Components	<ul style="list-style-type: none"> <li>200-meter banked indoor track</li> </ul>	<ul style="list-style-type: none"> <li>200-meter, 6-lane banked indoor track</li> </ul>	<ul style="list-style-type: none"> <li>200-meter, 6-lane banked indoor track</li> </ul>	<ul style="list-style-type: none"> <li>200-meter, 6-lane banked indoor track</li> </ul>
Operating Profit/Loss	\$2,800,000 in expenses; revenues N/A	N/A	\$300,000	(\$653,000)
Public Subsidy	N/A	N/A	No	Yes
Facility Usage	<ul style="list-style-type: none"> <li>Hosts 50 events per year</li> <li>College track meets are first priority; high schools are secondary</li> <li>100,000 attendees in a recent year of operations</li> <li>Attendance increases annually 10 to 15 percent</li> </ul>	<ul style="list-style-type: none"> <li>32 sports and non-sports events per year</li> <li>6 indoor track meets per indoor track season</li> <li>40,000 attendees per year</li> </ul>	<ul style="list-style-type: none"> <li>Hosts approximately 100 track events per year</li> <li>Events range from 100 to 5,000 athletes</li> <li>Approximately 125,000 attendees per year</li> <li>Track events occur from late October through March</li> </ul>	<ul style="list-style-type: none"> <li>90 high school, collegiate and professional track meets per year</li> <li>Hosts USA Track and Field Championships, Boston Indoor Games, Northeast 10 Championships, NCAA Division II Championships, High School National Championships</li> </ul>
Learning Points	<ul style="list-style-type: none"> <li>State of the art</li> <li>University partnership</li> </ul>	<ul style="list-style-type: none"> <li>Comparable city size to Eugene-Springfield</li> <li>Potential competitive facility</li> <li>Relatively low development cost</li> <li>Public/private partnership</li> </ul>	<ul style="list-style-type: none"> <li>Host facility for multiple colleges and local high schools</li> <li>Experiences above average "busy" seasons of activity (five months)</li> <li>Recommended by industry professionals as a great example of a renovation project</li> </ul>	<ul style="list-style-type: none"> <li>Recommended by industry professionals as a great example of meeting long existing unmet demand</li> <li>Significant depth and breadth of competitions per year</li> </ul>

## Conclusions

The viability of any potential new Multi-Use Sports Facilities in Eugene or Springfield is dependent, in large part, on their position in the competitive sports complex landscape, which will directly influence its ability to attract league play and tournaments from the regional market. The largest number of indoor and outdoor facilities are concentrated in the greater Salem, Portland and Seattle areas. Among the 31 identified competitive facilities, there are nearly 90 triangle fields, 145 rectangle fields, over 40 indoor courts and five major aquatic facilities and three major indoor track facilities. Notable potential competitive outdoor facilities within the state of Oregon include U.S. Cellular Community Park in Medford; the Capital FC Soccer Complex and Wallace Marine Park Softball Complex in Salem, and the Gordon Faber Recreation Complex in Hillsboro.

A total of 15 triangle facilities, 21 rectangle facilities, 18 indoor court facilities, nine indoor track facilities and ten aquatic facilities throughout the country were evaluated to provide comparative market context for potential new Multi-Use Sports Facilities in Eugene-Springfield, as well to assist in formulating hypothetical utilization of any new facility product in Eugene-Springfield.

The triangle facilities reviewed offer between four and 28 triangle fields, with an overall average of 15 fields per facility. Eight of the 16 comparable outdoor facilities have opened within the last 15 years, averaging \$22.4 million in construction costs. The population and corporate base levels of the primary market area surrounding Eugene-Springfield are comparable to the markets offering the reviewed facilities, as Eugene-Springfield ranks near the middle for both of these categories.

Fourteen of the 21 comparable rectangle facilities reviewed have opened within the last 15 years. Construction costs among comparable indoor facilities range from a low of \$6.0 million to a high of \$49.0 million, averaging approximately \$20.4 million in total development costs. The average facility offers 12 full-sized rectangle fields. Relative to the benchmarking analysis conducted for comparable triangle facilities, the 30/90/180-minute drive time market area around Eugene-Springfield compares slightly less favorably to the markets that support comparable rectangle field facilities.

The 18 indoor court facilities reviewed each feature full-size basketball and full-size volleyball court setups available to their users, and offer an average of eight full-sized basketball courts. Additional amenities include, but are not limited to, turf fields, futsal courts, indoor tracks, meeting/multi-purpose rooms, fitness center/weight rooms, athletic training centers, locker rooms, and concession areas/restaurants. A variety of sports and programs are supported by the facilities including youth and adult leagues, sport camps and training sessions, fitness and health classes, and court/facility rentals. On average, the facilities reviewed hosted between 40 and 50 basketball and volleyball tournaments annually.

The aquatic facilities reviewed each have at least one 50-meter competitive pool with moveable bulkheads, and six of the ten comparable facilities have at least one 25-yard warm-up/cool-down pool. Spectator seating at these facilities generally ranged from 1,500 to 4,000. A variety of programming needs are accommodated by the facilities, including, but not limited to, high school swimming, USA club swimming, collegiate swimming, synchronized swimming, water polo, public open swim and other programs, and swimming lessons. These facilities typically host, on average, 35 to 50 events annually, including everything from small local meets to the large regional and national meets. According to demographic analyses, these comparable facilities are generally situated in more affluent and population dense markets than Eugene-Springfield.

Track and field complexes are increasingly in-demand in major metropolitan areas. The growth of indoor track programs at high schools indicates that there is demand for premier indoor facilities. Most comparable track and field facilities have at least six lanes on a banked track and are 200 meters in length. The spectator capacity ranges from 3,500 to 5,000. Moreover, it is essential that the track and field complexes have the potential to accommodate the range of track meet events. Discussions with track facility owners indicated that premier facilities have spaces for events such as the long jump, triple jump, pole vault and 55/60 meter dash. Similar to the reviewed comparable aquatic centers, these facilities were found to reside in more population dense areas that also featured larger corporate bases and higher household incomes.

## 4.0 MARKET DEMAND ANALYSIS

The purpose of this section is to evaluate the market demand associated with potential new Multi-Use Sports Facilities in Eugene-Springfield. The results of a detailed community outreach process and telephone interviews with representatives of key local, state, regional and national athletic associations and organizations that run sports programs, leagues, tournaments, competitions, and meets is presented herein. Approximately 100 interviews were conducted as a part of this study. A listing of the organizations from which representatives were interviewed specifically for this study is shown in the exhibit below. These interviews were completed in early to mid-2016 and were conducted in-person and via telephone.

3d Lacrosse National	Oregon AAU Girl's Basketball
4J School District	Oregon AAU Track and Field and AAU Karate
ASA Softball - Oregon	Oregon AAU Volleyball
Beppe & Gianni and La Perla	Oregon Amateur Basketball
Cascades Collegiate Conference	Oregon Bicycling Association
City of Eugene Athletics	Oregon School Activities Association - Baseball
City of Eugene Parks	Oregon School Activities Association - Soccer
City of Eugene Parks	Oregon School Activities Association - Track
Columbia Empire Volleyball Association (CEVA) - Oregon	Oregon School Activities Association - Wrestling
Cottage Grove Chamber	Oregon School Activities Association Wrestling
Director of Eugene Libraries, Recreation and Cultural Services	Oregon Swimming
Emerald Valley Track Club	Oregon USA Wrestling
Erb Memorial Union, University of Oregon	Oregon Youth Soccer Association
Eugene Airport	Pacific Northwest Babe Ruth League
Eugene Aquatics	Pacific Northwest Masters Basketball
Eugene Area Chamber of Commerce	Pacific Real Estate Services
Eugene Challengers	PeaceHealth
Eugene City Council President	Pelada Football Academy
Eugene City Manager	Prevedello Hettick
Eugene City Water Polo	PrimeTime Sports
Eugene Emeralds	Reed Investments
Eugene Figure Skating Club	South Oregon Cal Ripken Baseball
Eugene Little League	Springfield Area Chamber of Commerce
Eugene Mens Lacrosse	Springfield City Manager
Eugene Timbers Football Club	Team Eugene Aquatics
Eugene Ultimate Group/Summer Solstice Tournament	Tournament Services Inc.
Evans, Elder, and Brown	Track City Track Club
Evans, Elder, and Brown	TrackTown USA
Hilton Eugene	Travel Lane County
Interested party	Travel Lane County
Kidsports	Travel Lane County
Lane Amateur Hockey Assoc	TRBO Basketball
Lane Community College	U.S. Youth Soccer - Western Region
Lane Community College	UO Athletics
Lane Community College	UO Student Rec
Lane County Administrator	UO Volleyball
Lane County Economic Development	US Club Soccer - National
Lane County Parks	US Club Soccer - Western Region
Lane Event Center	USA Gymnastics Region 2
Little League Baseball Western Region	USA Track and Field Oregon
Mayor of City of Springfield	USTA Pacific NW
National AAU Gymnastics/ AAU Junior Games	Valley River Inn
National Academy of Artistic Gymnastics	Western Oregon Hop Valley Pickleball Championships
Nike Portland Run Club	Willamalane Parks and Recreation District
NIRSA National Flag Football Championships	Willamette Valley Youth Baseball
Northern Oregon Cal Ripken Baseball	Willamette Valley Youth Football and Cheer
NSA Adult Leagues Oregon	YMCA
NSA Oregon	Youth Basketball of America
Oregon AAU Boy's Basketball and Football	Youth sports advocate

It is understood that one intent of this study is to assess demand by local Eugene-Springfield area sports groups and participants, including evaluating the ability of the area's current facilities to accommodate this demand. As such, detailed summaries related to each of the primary local organizations interviewed are presented within this chapter.

While understanding demand issues associated with local groups is critical in a study of this nature, it is also important to research and analyze non-local demand sources. For nearly all state-of-the-industry amateur sports complexes, demand sources with significant non-local participants/spectators are often critical in driving facility utilization and revenues. Even with providing local users with priority scheduling and rates, the opportunity to attract and accommodate tournaments and meets with significant nonlocal participant/spectator composition was important to investigate. Further, distinguishing lines between "local" and "nonlocal" are often not distinct, as a significant portion of events will have varying degrees of local involvement (direct and indirect) in terms of event procurement and athlete/team participation by local organizations in tournaments/meets that might normally be described as "non-local". A full picture of utilization for a potential new sports complex project cannot be reached without testing both local and non-local markets.

Additionally, the analysis was complemented by industry trend and participation data derived from a Pacific Northwest survey of sports participation tracked by zip code (provided by Travel Lane County), as well as data from the Sporting Goods Manufacturer's Association (SGMA) and the Sports Business Research Network (SBRNet). SGMA and SBRNet data was derived from a study based on approximately 40,000 interviews encompassing youth and adult sports participation. The following exhibit summarizes the estimated population base participating in each identified sport based on regional participation rates applied to the overall market population. The rate of participation includes only frequent users and does not account for occasional and infrequent users.

Estimated Frequent Participants												
	City of Eugene		Lane County		30-minute Drive Time		90-minute Drive Time		180-minute Drive Time		Oregon CBSA	
Market Population:	149,867		334,156		292,887		919,727		3,684,382		3,629,454	
	National Rate	Regional Rate	National Rate	Regional Rate	National Rate	Regional Rate	National Rate	Regional Rate	National Rate	Regional Rate	National Rate	Regional Rate
Swimming	1,389	1,250	3,097	2,787	2,714	2,443	8,523	7,671	34,143	30,729	33,634	30,271
Basketball	2,970	2,702	6,621	6,025	5,804	5,281	18,225	16,584	73,007	66,436	71,918	65,446
Volleyball	1,740	1,601	3,880	3,569	3,401	3,129	10,679	9,824	42,778	39,356	42,140	38,769
Gymnastics	774	882	1,725	1,967	1,512	1,724	4,749	5,413	19,022	21,686	18,739	21,362
Cheerleading	379	307	845	684	740	600	2,325	1,883	9,313	7,543	9,174	7,431
Wrestling	458	375	1,021	837	895	734	2,810	2,304	11,257	9,231	11,090	9,093
Soccer	2,022	2,123	4,507	4,733	3,951	4,148	12,406	13,027	49,699	52,184	48,958	51,406
Tennis	1,683	1,733	3,752	3,865	3,289	3,387	10,327	10,637	41,371	42,612	40,754	41,977
Baseball	1,469	1,029	3,276	2,294	2,872	2,010	9,018	6,313	36,126	25,288	35,587	24,911
Softball	1,307	1,006	2,913	2,243	2,553	1,966	8,019	6,174	32,122	24,734	31,643	24,365
Touch Football	502	542	1,120	1,209	981	1,060	3,082	3,328	12,345	13,332	12,161	13,134
Tackle Football	1,146	929	2,556	2,070	2,240	1,815	7,035	5,698	28,182	22,827	27,762	22,487
Flag Football	368	427	821	953	720	835	2,261	2,623	9,057	10,506	8,922	10,350
Lacrosse	189	164	421	366	369	321	1,159	1,008	4,644	4,040	4,574	3,980
Ice Hockey	450	396	1,002	882	879	773	2,759	2,428	11,053	9,727	10,888	9,582
<b>AVERAGE</b>	<b>1,123</b>	<b>1,031</b>	<b>2,504</b>	<b>2,299</b>	<b>2,195</b>	<b>2,015</b>	<b>6,892</b>	<b>6,328</b>	<b>27,608</b>	<b>25,349</b>	<b>27,196</b>	<b>24,971</b>

Note: Population numbers only include ages 7+  
Source: SGMA, 2016

Based on SMGA report's sports participation regional index, Lane County is projected to have an average of approximately 2,300 total frequent participants across all sports. Frequent participation based on the adjusted regional rate within a 30-, 90- and 180-minute drive of Eugene-Springfield average 2,015, 6,628 and 25,349, respectively. Basketball, soccer, tennis, volleyball and swimming have the most participants based on the regional index and population penetration analysis within the City of Eugene, Lane County and the State of Oregon. This is consistent with the 30-, 90- and 180-minute drive markets as those sports also have the highest number of total participants. Track was not included in SMGA/SBRNet survey data.

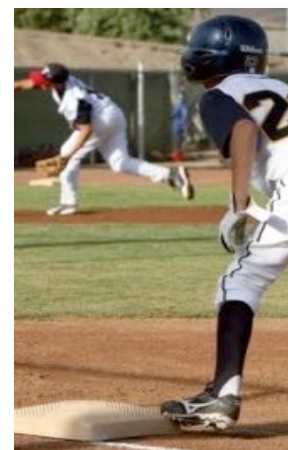
A summary of the market demand research, analysis and conclusions by sport and key organization interviewed is provided on the following pages.



## Triangle Field Users

SGMA/SBRNet statistics relating to the Pacific region suggest estimated frequent baseball participation (more than 50 times per year) of 2,300 in Lane County and frequent softball participation (more than 40 times per year) of just over 2,200. Within a 180-minute driving radius of Eugene-Springfield, there are an estimated 25,300 frequent baseball participants and 24,700 frequent softball participants.

Additionally, based on zip code level sports participation data specific to the Pacific Northwest, baseball participation rates for the Eugene-Springfield area are shown below. Household penetration represents total number of participants per household (shown as a percentage). Market potential represents an index of participation (where 100 is the national average). Softball data was not available.



Zip Code	City	Participants	Household Penetration	Market Potential	Total Households
97401	Eugene	1,868	9.55	87	19,568
97402	Eugene	2,189	10.15	93	21,561
97403	Eugene	433	11.12	102	3,896
97404	Eugene	1,397	10.76	99	12,976
97405	Eugene	1,773	9.27	85	19,135
97408	Eugene	540	10.59	97	5,095
97477	Springfield	1,468	9.47	87	15,502
97478	Springfield	1,381	9.61	88	14,379
<b>Eugene/Springfield</b>		<b>11,049</b>	<b>9.86</b>	<b>92</b>	<b>112,112</b>
<b>Pacific Northwest</b>		<b>474,252</b>	<b>11.00</b>	<b>78</b>	<b>4,312,168</b>

The estimated number of total baseball participants (frequent, infrequent and occasional) residing in Eugene-Springfield is estimated at just over 11,000. Market potential is near the national average of 100 but considerably higher than the Pacific Northwest average, with the highest single index measured in the zip code containing the University of Oregon.

A variety of techniques were used to estimate the market demand and use characteristics of a potential new baseball/softball complex in Eugene-Springfield. These include in-person interviews with local community stakeholders and potential complex users, telephone interviews with regional, state and national youth tournament and competition organizers, a review of industry trends and youth sports participation levels, and a review of historical utilization levels at comparable facilities.

Specifically, from the interviews of potential local and non-local users, data was collected with respect to the historical and expected number of participants of each of the tournaments/competitions, average number of family members/spectators per participant, hotel requirements, facility/complex requirements (i.e., complex specifications, amenities, number of courts/fields, parking, etc.), and expected rental rates. All of this information provided by interested groups was utilized in the study to determine the most appropriate programmatic elements of the potential baseball/softball complex and use characteristics, to be subsequently discussed.

A process of in-depth telephone interviews and extensive research was completed to estimate the amount of existing facility usage and potential unmet demand among local and non-local triangle field users in Eugene-Springfield. Additionally, extensive research was conducted to obtain additional information for each organization, including their size, participating age groups and practice/game schedules. The following text summarizes the insights that were gained from each user group, their estimated existing Eugene-Springfield sports facility usage, and their estimated incremental participation that would be generated and accommodated by a potential new multi-use sports facility complex.

## KIDSPORTS



KIDSPORTS is a private non-profit organization that provides youth sports programs for pre-K through 12<sup>th</sup> graders in Eugene/Springfield and surrounding areas. Programs and activities are open to any child able to participate, regardless of financial status and all participants have the opportunity to play. They currently leverage outdoor fields at schools

throughout the 4J School District and any available city fields throughout Eugene, Springfield, Bethel and other surrounding communities. There are an estimated 1,800+ kids participating in baseball or softball, with nearly 900 in baseball, 150 in the little hitters program and over 800 in softball.

KIDSPORTS representatives indicated that field access is becoming increasingly limited and that they cannot consistently use the turf fields around the area during the school year. It is estimated that dedicated access to a four-field complex would provide an opportunity to expand programming to another nearly 500 participants throughout the community. This would come through the continued growth in existing programming.

EXISTING USAGE									
	Number of Tournaments	Number of Teams	Average Participants Per Team	Total Players	Games Per Team	Total Player Attendance	Spectator Attd. Factor	Total Spectator Attendance	Total Attendance
<b>Leagues:</b>									
KIDSPORTS		125	15	1,856	8	14,848	2.0	29,696	44,544
<b>Tournaments:</b>									
KIDSPORTS	3	125	15	1,856	2.3	4,301	2.0	8,602	12,904
ESTIMATED INCREMENTAL INDUCED MARKET UTILIZATION									
	Number of Tournaments	Number of Teams	Average Participants Per Team	Total Players	Games Per Team	Total Player Attendance	Spectator Attd. Factor	Total Spectator Attendance	Total Attendance
<b>Incremental Usage:</b>									
<b>Leagues:</b>									
KIDSPORTS		31	15	458	8	3,664	2.0	7,328	10,992
<b>Tournaments:</b>									
KIDSPORTS	0	31	15	458	2.3	1,061	2.0	2,123	3,184

## Willamette Valley Youth Baseball



Willamette Valley Youth Baseball is Eugene's Babe Ruth organization for four to 15 year olds. There are approximately 100 teams and 1,500 athletes involved in the league. They currently use the four-field Ted Norman complex, a two-field complex in Springfield, and one field at Willamette High School (7 fields in total) for practices and games, and they use substandard spaces such as parking lots and empty fields for practice. Further, the league hosts four to five regional tournaments per year at Ted Norman. Organizers say they would "flood" a new baseball facility, and suggested the development of eight fields at one site. A new facility would likely accommodate a 30-team increase for the 9-U to 15-U age groups (an estimated 30 percent increase in participation within 5 years).

Leadership reported that the area lacks 90-foot fields in general, and that they lack access to 60-70 foot fields because of 4J's policies, as practice fields are priced at double the standard rate for non-school organizations. They felt that the market is in need for something to accommodate Little League, Kidsports and the school district. Specifically, they suggested four 90-foot fields with four 60- to 70-foot combination fields, all of which should be turf (except for dirt mounds) complete with lights.

Organizers think they could have practices Monday through Wednesday every week, with league play Thursday through Sunday (eight games per day), depending on field availability. Also, officials believe that Eugene could host a Cal Ripken (an affiliate league of Babe Ruth) or Babe Ruth World Series in the future (most likely 10 year olds, specifically). This would be an eight-day, ten-team tournament (round robin).

EXISTING USAGE									
	Number of Tournaments	Number of Teams	Average Participants Per Team	Total Players	Games Per Team	Total Player Attendance	Spectator Attd. Factor	Total Spectator Attendance	Total Attendance
<b>Leagues:</b>									
Willamette Valley Babe Ruth		96	13	1,288	20	25,760	2.0	51,520	77,280
<b>Tournaments:</b>									
Willamette Valley Babe Ruth	5	117	13	1,521	3.7	5,616	2.0	11,232	16,848
ESTIMATED INCREMENTAL INDUCED MARKET UTILIZATION									
	Number of Tournaments	Number of Teams	Average Participants Per Team	Total Players	Games Per Team	Total Player Attendance	Spectator Attd. Factor	Total Spectator Attendance	Total Attendance
<b>Incremental Usage:</b>									
<b>Leagues:</b>									
Willamette Valley Babe Ruth		28	13	374	20	7,480	2.0	14,960	22,440
<b>Tournaments:</b>									
Willamette Valley Babe Ruth	2	179	13	2,327	3.7	8,592	2.0	17,184	25,776

## Eugene Little League Baseball



Eugene Little League Baseball features approximately 400 youth baseball athletes between five and 18 from around the Eugene-Springfield area. League officials noted that the league is growing at a high rate, and that a potential new facility would likely expedite this growth. They currently use an assortment of fields located at elementary schools, middle schools, and high schools throughout Eugene. League representatives said that although they are currently well accommodated, they think that a new facility would help ensure that their league's continued growth will be supported and would help attract large Western Region Little League Baseball tournaments to the area.

A league representative thought that a new four-field complex could likely encourage 10 to 20 percent growth within two to three years. Organization leadership stated that they would be highly interested in utilizing new baseball facilities in the area. Recommended facility components for this local League's use include:

- Four fields with fully adjustable 50- to 90- foot base paths
- adjustable fences (plastic, with water filling the bases of the fences)
- dirt infield and grass outfield
- lights
- seating for 200 to 250 people at each field

EXISTING USAGE									
	Number of Tournaments	Number of Teams	Average Participants Per Team	Total Players	Games Per Team	Total Player Attendance	Spectator Attd. Factor	Total Spectator Attendance	Total Attendance
<b>Leagues:</b>									
Eugene Little League		23	13	289	13.0	3,757	2.0	7,514	11,271
<b>Tournaments:</b>									
Eugene Little League	0	0	13	0	0.0	0	2.0	0	0
ESTIMATED INCREMENTAL INDUCED MARKET UTILIZATION									
	Number of Tournaments	Number of Teams	Average Participants Per Team	Total Players	Games Per Team	Total Player Attendance	Spectator Attd. Factor	Total Spectator Attendance	Total Attendance
<b>Incremental Usage:</b>									
<b>Leagues:</b>									
Eugene Little League		4	14	55	13	715	2.0	1,430	2,145
<b>Tournaments:</b>									
Eugene Little League	1	48	13	624	3.8	2,340	2.0	4,680	7,020

## Eugene Little League Softball



It is estimated that Eugene Little League Softball features approximately 14 teams with around 12 athletes per team. Each team plays 18 league games per season, but the league does not host any rotating or invitational tournaments. They currently use various fields located in parks, elementary schools and high schools in Eugene and Springfield for practices and games. It is estimated that league games attract 6,000 spectators throughout the season.

It was determined that teams involved in Eugene Little League Softball would likely utilize additional field inventory, and that a potential new multi-use sports facility would help grow the league by six teams and attract over 40 non-local Little League-affiliated softball teams for tournaments.

EXISTING USAGE									
	Number of Tournaments	Number of Teams	Average Participants Per Team	Total Players	Games Per Team	Total Player Attendance	Spectator Attd. Factor	Total Spectator Attendance	Total Attendance
<b>Leagues:</b>									
Eugene Little League Softball		14	12	168	18	3,024	2.0	6,048	9,072
<b>Tournaments:</b>									
Eugene Little League Softball	0	0	12	0	0.0	0	2.0	0	0
ESTIMATED INCREMENTAL INDUCED MARKET UTILIZATION									
	Number of Tournaments	Number of Teams	Average Participants Per Team	Total Players	Games Per Team	Total Player Attendance	Spectator Attd. Factor	Total Spectator Attendance	Total Attendance
<b>Incremental Usage:</b>									
<b>Leagues:</b>									
Eugene Little League Softball		6	12	90	18	1,620	2.0	3,240	4,860
<b>Tournaments:</b>									
Eugene Little League Softball	1	48	12	576	3.8	2,160	2.0	4,320	6,480



## East Lane Little League Baseball



East Lane Little League Baseball, based primarily in Springfield, features approximately 36 youth baseball teams distributed across AA, AAA and Majors divisions. It is estimated that each team includes approximately 12 players per team, and each team plays approximately ten games per season. Teams play games and hold practices at fields located in Spring Creek West, Sheldon High School, Walterville Elementary School, Fairfield Elementary School, Guy Lee Park, and Riviera Baptist Church, among others. It is not estimated that East Lane baseball teams would utilize a potential new multi-use sports facility in the Eugene-Springfield area.

EXISTING USAGE									
	Number of Tournaments	Number of Teams	Average Participants Per Team	Total Players	Games Per Team	Total Player Attendance	Spectator Attd. Factor	Total Spectator Attendance	Total Attendance
<b>Leagues:</b>									
East Lane Little League		36	13	468	10	4,680	2.0	9,360	14,040
<b>Tournaments:</b>									
East Lane Little League	1	36	13	468	1.8	819	2.0	1,638	2,457
ESTIMATED INCREMENTAL INDUCED MARKET UTILIZATION									
	Number of Tournaments	Number of Teams	Average Participants Per Team	Total Players	Games Per Team	Total Player Attendance	Spectator Attd. Factor	Total Spectator Attendance	Total Attendance
<b>Incremental Usage:</b>									
<b>Leagues:</b>									
East Lane Little League		0	13	0	10	0	2.0	0	0
<b>Tournaments:</b>									
East Lane Little League	0	0	13	0	1.8	0	2.0	0	0

## East Lane Little League Softball



East Lane Little League Softball includes 18 girls youth softball teams distributed across AA, AAA and Majors divisions, with each team featuring approximately 12 athletes per team. It is estimated that each team plays approximately ten games per season. Game and practice fields are located at Guy Lee Park, Spring Creek West, Douglas Gardens Elementary School, Waltherville Elementary School, and Shasta Fields. It is not estimated that East

Lane Little League Softball would utilize a potential new multi-use sports facility, though they should not be removed from consideration as a potential user in the long term.

EXISTING USAGE									
	Number of Tournaments	Number of Teams	Average Participants Per Team	Total Players	Games Per Team	Total Player Attendance	Spectator Attd. Factor	Total Spectator Attendance	Total Attendance
<b>Leagues:</b>									
East Lane Little League Softball		18	12	216	10	2,160	2.0	4,320	6,480
<b>Tournaments:</b>									
East Lane Little League Softball	1	18	12	216	1.8	378	2.0	756	1,134
ESTIMATED INCREMENTAL INDUCED MARKET UTILIZATION									
	Number of Tournaments	Number of Teams	Average Participants Per Team	Total Players	Games Per Team	Total Player Attendance	Spectator Attd. Factor	Total Spectator Attendance	Total Attendance
<b>Incremental Usage:</b>									
<b>Leagues:</b>									
East Lane Little League Softball		0	12	0	10	0	2.0	0	0
<b>Tournaments:</b>									
East Lane Little League Softball	0	0	12	0	1.8	0	2.0	0	0

## Eugene Challengers



The Eugene Challengers are an American Legion team in Eugene that plays in Swede Johnson Stadium, a 1,000-seat facility with two locker rooms. The team is involved in organizing the Papa's Pizza Invitational, a one-field 10-team legion event featuring teams from around the state. The Legion team currently only goes out of state for non-local tournaments. Though not in need of additional fields, Challengers officials felt that the youth leagues need more fields. They stated that the number of turf fields at U.S. Cellular park in Medford would be great to have at one site in Eugene. They thought that such a facility would be in constant use from March and through August.

EXISTING USAGE									
	Number of Tournaments	Number of Teams	Average Participants Per Team	Total Players	Games Per Team	Total Player Attendance	Spectator Attd. Factor	Total Spectator Attendance	Total Attendance
<b>Leagues:</b>									
American Legion		2	18	36	16	576	1.5	864	1,440
<b>Tournaments:</b>									
American Legion	1	10	18	180	6.0	1,080	1.5	1,620	2,700
ESTIMATED INCREMENTAL INDUCED MARKET UTILIZATION									
	Number of Tournaments	Number of Teams	Average Participants Per Team	Total Players	Games Per Team	Total Player Attendance	Spectator Attd. Factor	Total Spectator Attendance	Total Attendance
<b>Incremental Usage:</b>									
<b>Leagues:</b>									
American Legion		0	18	0	16	0	1.5	0	0
<b>Tournaments:</b>									
American Legion	0	0	18	0	6.0	0	1.5	0	0

## Eugene Lightning



Eugene Lightning is an ASA-affiliated, five-team traveling girls' softball club that features athletes from around the Eugene area. The five teams are segmented by 10-U, 12-U and 14-U age groups and each team features approximately 14 athletes. The Lightning currently do not host league games at any field in Eugene, but they did act as hosts of two large softball tournaments in 2016 that each featured 50 to 60 teams at Shasta Fields. ASA Softball Oregon officials indicated that a new four- to five-field softball complex would likely accommodate more tournaments, and could help grow these existing tournaments. However, it was not determined if the Eugene Lightning would utilize a potential new multi-use sports facility for practices or games.

EXISTING USAGE									
	Number of Tournaments	Number of Teams	Average Participants Per Team	Total Players	Games Per Team	Total Player Attendance	Spectator Attd. Factor	Total Spectator Attendance	Total Attendance
<b>Leagues:</b>									
Eugene Lightning (ASA Softball)		5	14	70	0	0	2.0	0	0
<b>Tournaments:</b>									
Eugene Lightning (ASA Softball)	0	0	14	0	0.0	0	2.0	0	0
ESTIMATED INCREMENTAL INDUCED MARKET UTILIZATION									
	Number of Tournaments	Number of Teams	Average Participants Per Team	Total Players	Games Per Team	Total Player Attendance	Spectator Attd. Factor	Total Spectator Attendance	Total Attendance
<b>Incremental Usage:</b>									
<b>Leagues:</b>									
Eugene Lightning (ASA Softball)		5	14	70	0	0	2.0	0	0
<b>Tournaments:</b>									
Eugene Lightning (ASA Softball)	2	168	14	2,352	3.7	8,684	2.0	17,369	26,053

## ASA Women's and Co-Ed Softball



ASA Softball currently hosts one 16-team adult co-ed tournament and one 16-team adult women's tournament at Shasta Fields in Eugene. Each team includes approximately 14 participants. ASA officials noted that a larger concentration of fields in Eugene could potentially attract larger ASA tournaments, but that these two existing Eugene tournaments will likely stay the same size in future years.

EXISTING USAGE									
	Number of Tournaments	Number of Teams	Average Participants Per Team	Total Players	Games Per Team	Total Player Attendance	Spectator Attd. Factor	Total Spectator Attendance	Total Attendance
<b>Leagues:</b>									
ASA Co-Ed & Women's Softball		0	14	0	0	0	1.5	0	0
<b>Tournaments:</b>									
ASA Co-Ed & Women's Softball	2	32	14	448	6.0	2,688	1.5	4,032	6,720
ESTIMATED INCREMENTAL INDUCED MARKET UTILIZATION									
	Number of Tournaments	Number of Teams	Average Participants Per Team	Total Players	Games Per Team	Total Player Attendance	Spectator Attd. Factor	Total Spectator Attendance	Total Attendance
<b>Incremental Usage:</b>									
<b>Leagues:</b>									
ASA Co-Ed & Women's Softball	0	0	14	0	0	0	1.5	0	0
<b>Tournaments:</b>									
ASA Co-Ed & Women's Softball	0	0	14	0	0.0	0	1.5	0	0



## Willamalane Parks and Recreation District Adult Softball

Willamalane Parks and Recreation District runs an adult softball league that includes approximately 80 total teams and just over 1,000 amateur athletes. There are approximately 50 men's teams and 30 co-ed teams. Seasons run from mid-June through mid-August and most teams play 10 games. There are 18 men's teams that are in a "doubleheader" league, so they play 20 games per season. It is estimated that league play generates a total attendance figure of nearly 18,400, including approximately 12,300 athletes and 6,100 spectators. Willamalane does not produce any kind of community-wide tournaments. Willamalane officials indicated that they are largely accommodated by Guy Lee Park and Bob Artz Memorial Park for their leagues games during the week, and expressed very limited interest in utilizing a potential new multi-use sports facility in the Eugene-Springfield area.



EXISTING USAGE									
	Number of Tournaments	Number of Teams	Average Participants Per Team	Total Players	Games Per Team	Total Player Attendance	Spectator Attd. Factor	Total Spectator Attendance	Total Attendance
<b>Leagues:</b>									
Willamalane Parks and Rec District		80	12.5	1,000	12.25	12,250	0.5	6,125	18,375
<b>Tournaments:</b>									
Willamalane Parks and Rec District	0	0	12.5	0	0.0	0	0.5	0	0

ESTIMATED INCREMENTAL INDUCED MARKET UTILIZATION									
	Number of Tournaments	Number of Teams	Average Participants Per Team	Total Players	Games Per Team	Total Player Attendance	Spectator Attd. Factor	Total Spectator Attendance	Total Attendance
<b>Incremental Usage:</b>									
<b>Leagues:</b>									
Willamalane Parks and Rec District		0	12.5	0	12.25	0	0.5	0	0
<b>Tournaments:</b>									
Willamalane Parks and Rec District	0	0	12.5	0	0.0	0	0.5	0	0

## Eugene Parks and Recreation



The City of Eugene Recreation runs an 11-league softball program that features both men's and women's leagues. There are five men's leagues, two women's leagues and four co-ed leagues, and there are between two and six teams in each. They play Sundays through Fridays on 11 different fields throughout the Eugene area. League seasons run from early April through late May and late July through late August. Teams play approximately eight games per season, but the City Rec program does not currently produce any kind of multi-round tournament. It is estimated that a potential new multi-use sports facility would encourage growth of the program by attracting nearly 5,900 new athletes, which represents an increase of approximately 25 percent from existing figures. In addition, a new facility could potentially accommodate four new 20-team tournaments and two 60-team tournaments that could be produced by the City.

EXISTING USAGE									
	Number of Tournaments	Number of Teams	Average Participants Per Team	Total Players	Games Per Team	Total Player Attendance	Spectator Attd. Factor	Total Spectator Attendance	Total Attendance
<b>Leagues:</b>									
City of Eugene Adult Leagues		237	12	2,844	8	22,752	0.5	11,376	34,128
<b>Tournaments:</b>									
City of Eugene Adult Leagues	0	0	12	0	0.0	0	0.5	0	0
ESTIMATED INCREMENTAL INDUCED MARKET UTILIZATION									
	Number of Tournaments	Number of Teams	Average Participants Per Team	Total Players	Games Per Team	Total Player Attendance	Spectator Attd. Factor	Total Spectator Attendance	Total Attendance
<b>Incremental Usage:</b>									
<b>Leagues:</b>									
City of Eugene Adult Leagues		61	12	732	8	5,856	0.5	2,928	8,784
<b>Tournaments:</b>									
City of Eugene Adult Leagues	6	200	12	2,400	3.5	8,400	0.5	4,200	12,600

## Potential Non-Local User Groups

In general, the central location of Eugene-Springfield within the state of Oregon is highly desirable among teams and organizers from around the state and the Pacific Northwest. Many regional tournament organizers for both baseball and softball are seeking any concentration of 6 (or more) fields in Oregon. Developing a complex with a minimum of nine to ten multi-dimensional fields with portable mounds and fencing may create an opportunity to attract up to three or four 150-team national tournaments organized by ASA Softball. National tournaments require a minimum of 16 fields within a 60-mile drive, but typically host national events in markets that have 25 to 50 fields.

Tournament play generally requires one field per ten participating teams; requiring up to 15 fields to accommodate tournament demand. Teams average 14 to 15 kids per team and approximately 2.0 people travel per participant for 13 and under baseball or softball. Approximately 1.5 spectators travel per athlete for the 14-to-18- and under age groups.

Adjacent/proximate amenities such as entertainment, hotel or restaurant options are appreciated, but not critical for tournament site selection. Synthetic turf fields would be nice for baseball (ease of maintenance, additional practice times and greater likelihood of accommodating tournament games after inclement weather), but if fields are constructed with proper drainage and maintained regularly, artificial turf is not necessary. Softball users were generally more indifferent regarding the surfaces at a potential new facility. However, it is important to make the facility extremely user friendly – wheel configuration for easy access, large concession stands with announcer booth on second level, netting from backstop fence to announcer booth to catch foul balls, plenty of women's (and men's) bathroom facilities, meeting rooms, amphitheater or other event space, etc.

ESTIMATED INCREMENTAL INDUCED MARKET UTILIZATION									
	Number of Tournaments	Number of Teams	Average Participants Per Team	Total Players	Games Per Team	Total Player Attendance	Spectator Attd. Factor	Total Spectator Attendance	Total Attendance
<b>Incremental Usage:</b>									
<b>Leagues:</b>									
Non-Local Tournament Organizers	16	464	12	5,568	3.8	20,880	2.0	41,760	62,640

## Summary of Triangle Field Demand

- Overall demand conclusions:
  - Moderate to strong interest levels measured among potential baseball user groups;
  - Strong interest levels measured among softball user groups.
  - Seasons run from March/April through August.
- Local demand observations:
  - There currently exists a relatively large hub of local teams to fill smaller local and regional tournaments, but the complex would need to be large enough and state-of-the-industry in order to draw in participation from other markets and generate significant economic impact.
  - Local youth baseball and fast-pitch softball organizations could host two to four weekend tournaments per month between May and August that are more regional in nature with the availability of a new facility, and they have the potential to attract one to two national events annually after the first year of operations.
  - Potential exists to host 12- to 20-team local and regional baseball tournaments every weekend from April through July, with moderate potential to host new 50-team tournaments once per month. Local practices could also be held every day during the season of play.
  - Potential softball activity could comprise of 35- to 40-team local and regional tournaments twice per month on weekends, with daily practices during the week from March through August.
- Non-local demand observations:
  - Overall, tournament organizers expressed moderate to strong interest levels in hosting events in Eugene-Springfield but have overlooked the destination in the past due to lack of facilities.
  - It was noted that the complex would need to be located within close proximity to Interstate 5 (within 15 minutes) to be successful.
  - Skinned infields would accommodate all softball demand and youth baseball up to 13-year old, assuming fields have portable mounds available.
  - There is also potential to attract adult slow pitch softball tournaments during weekends of low utilization.

## Rectangle Field Users

SGMA/SBRNet statistics relating to the Pacific region suggest estimated frequent soccer participation (more than 40 times per year) of 4,700 in Lane County. Frequent lacrosse, tackle football, and touch/flag football participation is estimated at 400, 2,100 and 2,200, respectively. Within a 180-minute driving radius of Eugene-Springfield, there are an estimated 102,900 frequent participants in these "rectangle" activities. Rugby and field hockey are other sports that utilize "rectangle" outdoor fields of this nature. Many of these sports are rapidly gaining popularity throughout the country.

Additionally, based on zip code level sports participation data specific to the Pacific Northwest, soccer participation rates for the Eugene-Springfield area are shown below. Household penetration represents total number of participants per household (shown as a percentage). Market potential represents an index of participation (where 100 is the national average). Other sport data was not available.



Zip Code	City	Participants	Household Penetration	Market Potential	Total Households
97401	Eugene	2,025	10.35	95	19,568
97402	Eugene	2,241	10.40	96	21,561
97403	Eugene	483	12.40	114	3,896
97404	Eugene	1,386	10.68	98	12,976
97405	Eugene	1,605	8.39	77	19,135
97408	Eugene	426	8.36	77	5,095
97477	Springfield	1,423	9.18	84	15,502
97478	Springfield	1,556	10.82	100	14,379
<b>Eugene/Springfield</b>		<b>11,145</b>	<b>9.94</b>	<b>93</b>	<b>112,112</b>
<b>Pacific Northwest</b>		<b>542,070</b>	<b>10.69</b>	<b>72</b>	<b>5,071,461</b>

The estimated number of total soccer participants (frequent, infrequent and occasional) residing in Eugene-Springfield is estimated at approximately 11,100. Market potential is near the national average of 100 but considerably higher than the Pacific Northwest average, with the highest single index measured again in the zip code containing UO.

In-depth telephone interviews were completed with representatives of local and non-local rectangle field users (such as soccer and lacrosse groups) in order to learn their current usage of facilities in the Eugene-Springfield area as well as to measure their interest in using potential new multi-use sports facilities. In addition to these calls, extensive research was conducted to obtain additional information for each organization, including their size, participating age groups and practice/game schedules. The following text summarizes the insights that were gained from each user group, their estimated existing Eugene-Springfield sports facility usage, and their estimated incremental participation that would be generated and accommodated by a potential new multi-use sports facility.



## KIDSPORTS



KIDSPORTS is a private non-profit organization that provides youth sports programs for pre-K through 12<sup>th</sup> graders in Eugene/Springfield and surrounding areas. Programs and activities are open to any child able to participate, regardless of financial status and all participants have the opportunity to play. They currently leverage outdoor fields at schools

throughout the 4J School District and any available city fields throughout Eugene, Springfield, Bethel and other surrounding communities. There are an estimated 7,000+ kids participating in soccer, lacrosse, tackle football and flag football leagues, with soccer accounting for nearly 6,000 of these participants.

KIDSPORTS representatives indicated that field access is becoming increasingly limited and that they cannot consistently use the turf fields around the area during the school year. It is estimated that dedicated access to a four-field complex would provide an opportunity to expand programming to another 1,400 participants throughout the community. This would come through the continued growth in existing programming as well as potentially expanding into other sports such as Ultimate Frisbee or rugby.

EXISTING USAGE									
	Number of Tournaments	Number of Teams	Average Participants Per Team	Total Players	Games Per Team	Total Player Attendance	Spectator Attd. Factor	Total Spectator Attendance	Total Attendance
<b>Leagues:</b>									
KIDSPORTS		623	11	7,003	7	50,381	2.0	100,762	151,143
<b>Tournaments:</b>									
KIDSPORTS	8	166	13	2,158	2	4,412	2.0	8,825	13,237
ESTIMATED INCREMENTAL INDUCED MARKET UTILIZATION									
	Number of Tournaments	Number of Teams	Average Participants Per Team	Total Players	Games Per Team	Total Player Attendance	Spectator Attd. Factor	Total Spectator Attendance	Total Attendance
<b>Incremental Usage:</b>									
<b>Leagues:</b>									
KIDSPORTS		125	11	1,400	7	10,072	2.0	20,144	30,216
<b>Tournaments:</b>									
KIDSPORTS	0	125	11	1,405	2	2,873	2.0	5,746	8,619

## Eugene Timbers Futbol Club



Eugene Timbers Futbol Club is a 30+ team (500 athletes) youth club for 13 to 18 year olds that also offers programs for 300 kids under the age of ten in its development program. They currently use the two fields at Lane Community College and 1 to 2 fields at various Eugene high schools during March through May and September through October. Officials noted that although there are many turf fields in the area, there is currently a lack of a concentration of fields in Eugene, and the organization cannot consistently use the turf fields around the area during the school year.

The club indicated that they need extra fields for the periods of March through April and September through October, for both practices and games. They are currently utilizing school and church gyms for practice when there is rainfall due to the slippery nature of the Community College's turf fields when wet. Organization representatives expressed strong interest in utilizing four new fields every weekday for league play and practices in March through May and September through October from 4:30pm to 9:00pm. They would use two fields during the other months. Club leaders noted that they would like to see at least two lit full-sized turf fields at a potential new site, in addition to two lit full-sized grass fields. They would also like to see a bathroom and concessions area onsite.

About half the organization's teams travel up and down I-5 to tournaments around the state, and Club officials noted that it would be great to have a home facility for these tournaments. With a new facility that has four fields at the same site, they would shift all of this use to that facility, and believe the 6-U to 13-U age group could substantially grow and add a total of 400 new athletes (50 percent growth) to the program within 5 years. Officials also indicated that another four-field facility would likely bring in four new weekend tournaments with 50 to 60 teams, and maybe one with 140 to 150 teams if they could use up to twelve fields between the new complex, Willamalane, Lane Community College and various other fields. Officials recommended looking at Tualatin Hills and Delta Park as ideal models for facility development. They were neutral about a site at Golden Gardens, but did note that the beltline helps provide some Interstate access. It would not be detrimental to hosting tournament activity.

EXISTING USAGE									
	Number of Tournaments	Number of Teams	Average Participants Per Team	Total Players	Games Per Team	Total Player Attendance	Spectator Attd. Factor	Total Spectator Attendance	Total Attendance
<b>Leagues:</b>									
Eugene Timbers Futbol Club		60	13	800	8	6,400	2.0	12,800	19,200
<b>Tournaments:</b>									
Eugene Timbers Futbol Club	1	100	5	500	3.3	1,625	2.0	3,250	4,875
ESTIMATED INCREMENTAL INDUCED MARKET UTILIZATION									
	Number of Tournaments	Number of Teams	Average Participants Per Team	Total Players	Games Per Team	Total Player Attendance	Spectator Attd. Factor	Total Spectator Attendance	Total Attendance
<b>Incremental Usage:</b>									
<b>Leagues:</b>									
Eugene Timbers Futbol Club		6	13	80	8	640	2.0	1,280	1,920
<b>Tournaments:</b>									
Eugene Timbers Futbol Club	3	150	13	1,950	3.3	6,338	2.0	12,675	19,013

## Pelada Football Academy



Pelada Football Academy is a youth league that serves as the “middle level” for talent in the Eugene-Springfield area, between Kidsports (the lowest level) and the Eugene Timbers (elite). They have 400 athletes involved in the league aged between five and 19. The Academy currently uses Willamalane Center for Sports and Recreation for a majority of practices, but use the grass fields at two private schools as well. They currently use Willamalane 800 hours per year (resulting in a three year contract equates to around \$20 per hour per field), and they do not utilize the lights.

They have felt as though they are short on field space, and that Eugene lacks both a concentration of and total number of fields for significant tournament play. If a new four-full-sized-field facility (all turf) were built, with two youth-sized fields (75 to 85 yards long, 45 to 50 yards wide – youth leagues are flexible), they would use the facility three hours per day on weekdays, and five to six hours per day for summer camps (from June through July). They would displace half of their use to a new facility as Willamalane’s fields are too “multipurpose and covered in lines” and the private schools’ grass fields are substandard. Moreover, officials noted that a new facility would likely help them grow by nearly 50 percent within five years, with all of this new usage occurring at the potential new site. Also, they would likely host seven to eight 30-team small-side tournaments per year (these would be mostly local, but each event would likely draw day trippers from nearby cities such as Roseburg or Corvallis).

Academy leadership explained that they would require portable bathrooms, an indoor locker room facility to ensure tournament play for other leagues, and a PA system. They would strongly prefer a square-shaped layout of fields like at Willamalane. They also stated that the site at Golden Gardens would be a little out of the way for many athletes, but that many already face the same drive distance to Willamalane. It was also importantly noted that they do not like using cones to adjust field sizes for youth games, and the area severely lacks quality youth-sized fields.

Academy officials also recommended considering natural composite turf for a potential new multi-use sports facility. If this is not considered for the games fields, they should add the natural composite to a small section of the complex and have a row of “goalie practice stations”. Synthetic turf has recently been linked to leukemia in youth and there has been a growing correlation between youth goalies and leukemia.

EXISTING USAGE									
	Number of Tournaments	Number of Teams	Average Participants Per Team	Total Players	Games Per Team	Total Player Attendance	Spectator Attd. Factor	Total Spectator Attendance	Total Attendance
<b>Leagues:</b>									
Pelada Futbol Academy		45	13	585	8	4,680	2.0	9,360	14,040
<b>Tournaments:</b>									
Pelada Futbol Academy	0	0	13	0	0	0	2.0	0	0
ESTIMATED INCREMENTAL INDUCED MARKET UTILIZATION									
	Number of Tournaments	Number of Teams	Average Participants Per Team	Total Players	Games Per Team	Total Player Attendance	Spectator Attd. Factor	Total Spectator Attendance	Total Attendance
<b>Incremental Usage:</b>									
Pelada Futbol Academy		5	13	60	8	480	2.0	960	1,440
<b>Tournaments:</b>									
Pelada Futbol Academy	2	60	13	780	3.25	2,535	2.0	5,070	7,605

## Eugene Parks and Recreation



Eugene Parks and Recreation currently runs six leagues for adult amateur soccer with approximately six teams per league. Games are played Sunday through Wednesday, with three league games being played each of these nights. Parks and Recreation hosts its games on 14 different fields located throughout Eugene. Additionally, Parks and Recreation runs four ultimate Frisbee leagues for four different seasons with approximately six teams per league. League games are held on Sunday nights, with approximately 12 games being played on these nights. The ultimate Frisbee teams play on 16 different fields.

It is estimated that dedicated access to a four-field complex would provide an opportunity to expand programming to another nearly 400 participants throughout the community. This would come through the continued growth in existing programming.

EXISTING USAGE									
	Number of Tournaments	Number of Teams	Average Participants Per Team	Total Players	Games Per Team	Total Player Attendance	Spectator Attd. Factor	Total Spectator Attendance	Total Attendance
<b>Leagues:</b>									
City of Eugene Adult Leagues		175	11	1,957	8	15,656	0.5	7,828	23,484
<b>Tournaments:</b>									
City of Eugene Adult Leagues	0	0	0	0	0.0	0	0.5	0	0
ESTIMATED INCREMENTAL INDUCED MARKET UTILIZATION									
	Number of Tournaments	Number of Teams	Average Participants Per Team	Total Players	Games Per Team	Total Player Attendance	Spectator Attd. Factor	Total Spectator Attendance	Total Attendance
<b>Incremental Usage:</b>									
<b>Leagues:</b>									
City of Eugene Adult Leagues		35	11	390	8	3,120	0.5	1,560	4,680
<b>Tournaments:</b>									
City of Eugene Adult Leagues	0	0	11	0	2.0	0	2.0	0	0

## Northwest Christian University



Northwest Christian University features one men's soccer team and one women's soccer team. Each team features approximately 20 college athletes and plays approximately 18 games per season. Each team plays nine games at Willamalane Center for Sports and Recreation during the fall and it is estimated that these 18 total games attract approximately 2,000 spectators. After speaking with University officials, it was determined that they are largely satisfied with their use of Willamalane for games, and that they were not looking for additional practice fields either.

EXISTING USAGE									
	Number of Tournaments	Number of Teams	Average Participants Per Team	Total Players	Games Per Team	Total Player Attendance	Spectator Attd. Factor	Total Spectator Attendance	Total Attendance
<b>Leagues:</b>									
Northwest Christian University		2	20	40	18	720	2.8	2,016	2,736
<b>Tournaments:</b>									
Northwest Christian University	0	0	20	0	0	0	2.8	0	0
ESTIMATED INCREMENTAL INDUCED MARKET UTILIZATION									
	Number of Tournaments	Number of Teams	Average Participants Per Team	Total Players	Games Per Team	Total Player Attendance	Spectator Attd. Factor	Total Spectator Attendance	Total Attendance
<b>Incremental Usage:</b>									
<b>Leagues:</b>									
Northwest Christian University		0	20	0	18	0	2.8	0	0
<b>Tournaments:</b>									
Northwest Christian University	0	0	20	0	0	0	2.8	0	0

## Willamette Valley Youth Football and Cheer



Willamette Valley Youth Football and Cheer is a youth football organization largely made up of teams from North Eugene, Sheldon, Willamette and South Eugene. In total, there are 45 teams in the Eugene area that are involved in the league, which equates to approximately 1,100 youth athletes. In addition, there are around six teams located in Springfield. Each team has an eight-game season and almost all league games are played on fields in Eugene. They currently use facilities at Briggs Middle School, Cal Young Middle School, South Eugene High School, and Sheldon High School for games and practices. Moreover, they also run two practices per week during the season, which runs from August through November.

Officials from the organization indicated that they would likely use a potential new multi-use sports facility in the area for games. If a complex had two full-sized, marked and lit turf football fields, it could likely accommodate weekly league games and possibly a playoff series at the end of the year. It was also recommended to include a small building onsite that would house two bathrooms, a permanent concessions stand, and an announcer's booth on the second level.

EXISTING USAGE									
	Number of Tournaments	Number of Teams	Average Participants Per Team	Total Players	Games Per Team	Total Player Attendance	Spectator Attd. Factor	Total Spectator Attendance	Total Attendance
<b>Leagues:</b>									
Willamette Valley Youth Football		51	25	1,250	8	10,000	2.0	20,000	30,000
<b>Tournaments:</b>									
Willamette Valley Youth Football	0	0	25	0	0.0	0	2.0	0	0
ESTIMATED INCREMENTAL INDUCED MARKET UTILIZATION									
	Number of Tournaments	Number of Teams	Average Participants Per Team	Total Players	Games Per Team	Total Player Attendance	Spectator Attd. Factor	Total Spectator Attendance	Total Attendance
<b>Incremental Usage:</b>									
<b>Leagues:</b>									
Willamette Valley Youth Football		0	25	0	8	0	2.0	0	0
<b>Tournaments:</b>									
Willamette Valley Youth Football	0	0	25	0	0	0	2.0	0	0



## Maximus Sports (Flag Football)



Maximus Sports is Eugene's primary youth and adult option for eight-on-eight flag football. It is estimated that the organization includes 36 teams, with each team playing 16 games per season. In total, the league's activity is estimated to generate a total spectator-and-athlete attendance figure of just over 19,000. The organization holds its camps, clinics and scrimmages at

ATA/Jefferson Middle School, and its adult league hosts an annual tournament at the Willamalane Center for Sports and Recreation. It is estimated that 24 teams of 15 players participate in this tournament per year. It is not estimated that Maximus Sports would be utilizing a potential new multi-use sports complex.

EXISTING USAGE									
	Number of Tournaments	Number of Teams	Average Participants Per Team	Total Players	Games Per Team	Total Player Attendance	Spectator Attd. Factor	Total Spectator Attendance	Total Attendance
<b>Leagues:</b>									
Maximus Sports (Flag Football)		36	11	396	16	6,336	2.0	12,672	19,008
<b>Tournaments:</b>									
Maximus Sports (Flag Football)	1	24	15	360	3.8	1,368	2.0	2,736	4,104
ESTIMATED INCREMENTAL INDUCED MARKET UTILIZATION									
	Number of Tournaments	Number of Teams	Average Participants Per Team	Total Players	Games Per Team	Total Player Attendance	Spectator Attd. Factor	Total Spectator Attendance	Total Attendance
<b>Incremental Usage:</b>									
<b>Leagues:</b>									
Maximus Sports (Flag Football)		0	11	0	16	0	2.0	0	0
<b>Tournaments:</b>									
Maximus Sports (Flag Football)	0	0	11	0	0	0	2.0	0	0

## Eugene Masters Lacrosse



Eugene Masters Lacrosse is an adult club lacrosse team that features men ages 18 and older. They travel throughout Oregon and the Pacific Northwest and feature 26 people on their team. They currently use Willamalane Center for their practices and games and pay \$25 per hour for one field. They only practice once a week and do not experience significant difficulty with scheduling at Willamalane.

Team representatives did note that younger lacrosse groups in the area have trouble getting field access and suggested that we contact Awestruck Lacrosse to discuss this issue with them. They reported that the local school district often prevents access of their fields. Thurston High School has a grass field that holds many youth practices, but the users would often express dissatisfaction with its quality.

EXISTING USAGE									
	Number of Tournaments	Number of Teams	Average Participants Per Team	Total Players	Games Per Team	Total Player Attendance	Spectator Attd. Factor	Total Spectator Attendance	Total Attendance
<b>Leagues:</b>									
Eugene Masters Lacrosse		1	26	26	7	182	0.5	91	273
<b>Tournaments:</b>									
Eugene Masters Lacrosse	0	0	26	0	0.0	0	0.5	0	0

ESTIMATED INCREMENTAL INDUCED MARKET UTILIZATION									
	Number of Tournaments	Number of Teams	Average Participants Per Team	Total Players	Games Per Team	Total Player Attendance	Spectator Attd. Factor	Total Spectator Attendance	Total Attendance
<b>Incremental Usage:</b>									
<b>Leagues:</b>									
Eugene Masters Lacrosse		0	26	0	7	0	0.5	0	0
<b>Tournaments:</b>									
Eugene Masters Lacrosse	0	0	26	0	0	0	0.5	0	0

## Awestruck Lacrosse

Awestruck Lacrosse is a traveling competitive lacrosse club that features fall, winter and summer leagues for 10-U through 18-U age groups. There are approximately 60 players that participate each season. Practices are currently held at Cal Young Middle School and Sheldon High School, and indoor scrimmages are played at Kick City Sports Complex in Springfield during the winter. The club does not presently host any league games or tournament activity, but local officials indicated that Awestruck would significantly benefit from a new multi-use complex that would help accommodate their growth.



EXISTING USAGE									
	Number of Tournaments	Number of Teams	Average Participants Per Team	Total Players	Games Per Team	Total Player Attendance	Spectator Attd. Factor	Total Spectator Attendance	Total Attendance
<b>Leagues:</b>									
Awestruck Lacrosse		4	30	120	0	0	2.0	0	0
<b>Tournaments:</b>									
Awestruck Lacrosse	0	0	30	0	0	0	2.0	0	0
ESTIMATED INCREMENTAL INDUCED MARKET UTILIZATION									
	Number of Tournaments	Number of Teams	Average Participants Per Team	Total Players	Games Per Team	Total Player Attendance	Spectator Attd. Factor	Total Spectator Attendance	Total Attendance
<b>Incremental Usage:</b>									
<b>Leagues:</b>									
Awestruck Lacrosse		0	30	0	0	0	2.0	0	0
<b>Tournaments:</b>									
Awestruck Lacrosse	1	8	30	240	4	960	2.0	1,920	2,880

## Eugene Ultimate



Eugene Ultimate is the parent company of four programs: a middle school program with 100 or so participants, a high school league with around 200 participants, a University of Oregon club league affiliate, as well as city-run adult leagues. Each program has three different divisions according to skill level.

In regards to its local usage, Eugene Ultimate leadership stated that they are largely satisfied with the available field space, but they are worried about having to pay for them starting next year due to a new agreement with the school district. Moreover, they are interested in developing more non-local-oriented tournaments, but they would need more fields. They said that a 16- to 24-field complex would be ideal (which equates to eight to 12 full-sized soccer fields); grass is preferred, but they do play on turf in early spring (or other rainy parts of the year). Notably, with this concentration of fields, the existing Summer Solstice event (which draws participants from around the country) could likely be grown from 30 to 50 teams. Officials also felt that this potential new complex could attract 50- to 80-team tournaments such as the High School Western Regionals (currently held in Crystal Lake Park in Corvallis), the Club Nationals and the College Nationals.

Eugene Ultimate leadership estimated that total local use of a new facility would equate to one to two league games per week depending on the costs to rent fields. For grass fields, they expect \$25 per field per hour, for turf they expect \$35 per field per hour, and with lights and turf \$50 per field per hour. They also added that they require lit fields and at least three yards to be between each field.

EXISTING USAGE									
	Number of Tournaments	Number of Teams	Average Participants Per Team	Total Players	Games Per Team	Total Player Attendance	Spectator Attd. Factor	Total Spectator Attendance	Total Attendance
<b>Leagues:</b>									
Eugene Ultimate Frisbee		40	12.5	500	12	6,000	0.5	3,000	9,000
<b>Tournaments:</b>									
Eugene Ultimate Frisbee	1	32	12.5	400	2.3	920	0.5	460	1,380
ESTIMATED INCREMENTAL INDUCED MARKET UTILIZATION									
	Number of Tournaments	Number of Teams	Average Participants Per Team	Total Players	Games Per Team	Total Player Attendance	Spectator Attd. Factor	Total Spectator Attendance	Total Attendance
<b>Incremental Usage:</b>									
<b>Leagues:</b>									
Eugene Ultimate Frisbee		0	12.5	0	12	0	0.5	0	0
<b>Tournaments:</b>									
Eugene Masters Lacrosse	0	0	26	0	0	0	0.5	0	0

## Eugene Rugby Football Club



The Eugene Rugby Football Club is a traveling rugby club for men ages 18 and up. It currently has 13 total members. The club will use the turf field at the University of Oregon campus for their practices, and they practice twice per week from the end of January through the month of April. They typically play 12 games per year (about one per week during the season) and they play four to six home games at Agnes Stewart Middle School in Springfield. Local officials indicated that the Club is likely well accommodated and they most likely do not require additional facilities at this time.

EXISTING USAGE									
	Number of Tournaments	Number of Teams	Average Participants Per Team	Total Players	Games Per Team	Total Player Attendance	Spectator Attd. Factor	Total Spectator Attendance	Total Attendance
<b>Leagues:</b>									
Eugene Rugby Football Club		1	13	13	4	52	0.5	26	78
<b>Tournaments:</b>									
Eugene Rugby Football Club	0	0	13	0	0	0	0.5	0	0
ESTIMATED INCREMENTAL INDUCED MARKET UTILIZATION									
	Number of Tournaments	Number of Teams	Average Participants Per Team	Total Players	Games Per Team	Total Player Attendance	Spectator Attd. Factor	Total Spectator Attendance	Total Attendance
<b>Incremental Usage:</b>									
<b>Leagues:</b>									
Eugene Rugby Football Club		0	13	0	4	0	0.5	0	0
<b>Tournaments:</b>									
Eugene Rugby Football Club	0	0	13	0	0	0	0.5	0	0

## Eugene Reign Rugby Club



Eugene Reign Rugby Club is a traveling women's rugby club that includes 17 team members. They only play two home games per year in the Eugene area at Agnes Stewart Middle School. Due to this limited activity within the city, it is unlikely that the group would significantly utilize a potential new multi-use sports facility in Eugene-Springfield.

EXISTING USAGE									
	Number of Tournaments	Number of Teams	Average Participants Per Team	Total Players	Games Per Team	Total Player Attendance	Spectator Attd. Factor	Total Spectator Attendance	Total Attendance
<b>Leagues:</b>									
Eugene Reign Rugby Club		1	17	17	2	34	0.5	17	51
<b>Tournaments:</b>									
Eugene Reign Rugby Club	0	0	17	0	0.0	0	0.5	0	0
ESTIMATED INCREMENTAL INDUCED MARKET UTILIZATION									
	Number of Tournaments	Number of Teams	Average Participants Per Team	Total Players	Games Per Team	Total Player Attendance	Spectator Attd. Factor	Total Spectator Attendance	Total Attendance
<b>Incremental Usage:</b>									
<b>Leagues:</b>									
Eugene Reign Rugby Club		0	17	0	2	0	0.5	0	0
<b>Tournaments:</b>									
Eugene Reign Rugby Club	0	0	17	0	0	0	0.5	0	0



## Potential Non-Local User Groups

State tournament planners indicated that the Oregon youth soccer market is becoming saturated with tournaments relative to the number of clubs that exist. This could moderate the potential draw of new state and smaller regional tournaments in Eugene-Springfield. State tournament organizers are also largely satisfied with facilities in Bend and Beaverton for major tournaments. Moreover, several previous attempts at starting new statewide tournaments in Eugene have failed due to the distance between Portland and Eugene, and the lack of a critical mass of fields in the area.

If a facility with a minimum of 16-plus fields were built (with at least 10 full-sized fields), there is significant potential to host 5 to 6 large regional and/or national events per year. For example: the U.S. Club Soccer Western Regionals tournament is a 4-day tournament with 150 to 250 teams, 15 players/coaches per team, and 2.5 spectators per athlete. Another 4-field facility has potential to bring in an additional 4 to 6 weekend tournaments with 50 to 60 teams to Eugene-Springfield, and possibly one with 100 to 110 teams. These would include teams with 11 participants on each team, with 2.5 spectators per participant.

Regional and national lacrosse groups would like to see an 8- to 12-multipurpose field complex built in Eugene-Springfield. These lacrosse planners would likely bring two to three two-day tournaments per year with 20 teams each, 18 athletes per team and one spectator per athlete. Sixty percent of teams would be non-local. Potential also exists to bring one national tournament per year, with 80 to 100 teams.

Additional complex amenities preferred by tournament organizers include: a covered shelter or dedicated headquarter area for staff, referees, meetings, etc., concessions area/on site dining options (with open vendor policy), hotels, restaurants, entertainment, recreational activities, etc. within less than a 30-minute drive; and, ample parking. The general preference is for turf fields (especially with inclement weather typical in Oregon), but if fields are constructed with proper drainage and maintained regularly, artificial turf may not be necessary. It was noted that natural composite turf should be incorporated into practice fields or around goals to reduce exposure of goalkeepers to carcinogens.

ESTIMATED INCREMENTAL INDUCED MARKET UTILIZATION									
Incremental Usage:	Number of Tournaments	Number of Teams	Average Participants Per Team	Total Players	Games Per Team	Total Player Attendance	Spectator Attd. Factor	Total Spectator Attendance	Total Attendance
Non-Local Tournament Organizers	10	180	13	2,340	3.3	7,722	2.0	15,444	23,166

## Summary of Rectangle Field Demand

- Overall demand conclusions:
  - Moderate to strong interest levels measured among potential soccer user groups.
  - Moderate to strong interest levels measured among other multisport user groups.
  - Seasons for soccer, ultimate Frisbee and lacrosse typically run from April through June and again from September through November, while seasons for football and flag football typically run from September until the beginning of December.
- Local demand observations:
  - In general, local soccer organizers would like at minimum a new four- to six-field soccer complex to accommodate daily practices and weekend events, as well as accommodate future growth. A new facility would likely be used every weekday for practices from March through June and from September through November.
  - Pelada Football Academy and the Eugene Timbers would both be interested in utilizing a new facility (with a minimum of four turf fields) for daily practices from 4pm to 9pm and weekly league play.
  - Existing local complexes do not offer enough fields to accommodate larger tournaments at the state, regional and national level. Willamalane Sports Center is cited as a high quality facility with very fair rental rates, but its four fields do not have the availability to fully accommodate local demand or regional/national tournament activity.
  - Local lacrosse and ultimate groups expressed strong interest in using new fields in the area.
  - There is significant projected growth in demand for multisport field use from flag football, rugby, ultimate Frisbee/football, lacrosse, field hockey and other such sports; however, this will largely be based on the presence of adequate local leadership and demand.
- Non-local demand observations:
  - Larger regional and national soccer tournaments could represent potential users of a Eugene-Springfield multi-purpose sports complex, as there is demand from national and western regional tournament organizers for field space in the western U.S. These tournaments could feature over 150 teams.
  - Regional and national soccer tournaments typically require a minimum of 14 to 16 fields, and a minimum of 20 for larger national events.
  - Overall, event organizers felt that in order for a soccer complex to be successful in the area, it would require a local club (or a conglomerate of local clubs) to effectively maintain, market and sell the facility.
  - Specifically, regional and national lacrosse groups would like to see an 8- to 12-multipurpose field complex built in Eugene-Springfield. These lacrosse planners would likely bring two to three two-day tournaments per year with 20 teams each, 18 athletes per team and one spectator per athlete. Sixty percent of teams would be non-local. Potential also exists to bring one national tournament per year, with 80 to 100 teams.

## Indoor Court Users

SGMA/SBRNet statistics relating to the Pacific region suggest estimated frequent basketball participation (more than 50 times per year) of 6,000 in Lane County and frequent volleyball participation (more than 20 times per year) of just over 3,600. Within a 180-minute driving radius of Eugene-Springfield, there are an estimated 66,500 frequent basketball participants and 39,400 frequent volleyball participants.

Many indoor facilities at athletic complexes are constructed to be multipurpose in nature, being flexible to host and accommodate a number of varying sports, recreation and other indoor activities. Basketball and volleyball courts can be utilized for indoor soccer, indoor football, cheer/dance competitions, indoor lacrosse, martial arts, wrestling, inline/roller hockey, gymnastics and other sports.



BASKETBALL PARTICIPATION					
Zip Code	City	Participants	Household Penetration	Market Potential	Total Households
97401	Eugene	3,835	19.60	98	19,568
97402	Eugene	4,428	20.54	103	21,561
97403	Eugene	992	25.46	128	3,896
97404	Eugene	2,753	21.21	106	12,976
97405	Eugene	3,350	17.51	88	19,135
97408	Eugene	902	17.71	89	5,095
97477	Springfield	2,939	18.96	95	15,502
97478	Springfield	2,883	20.05	101	14,379
<b>Eugene/Springfield</b>		<b>22,082</b>	<b>19.70</b>	<b>101</b>	<b>112,112</b>
<b>Pacific Northwest</b>		<b>793,745</b>	<b>19.86</b>	<b>79</b>	<b>3,996,279</b>

VOLLEYBALL PARTICIPATION					
Zip Code	City	Participants	Household Penetration	Market Potential	Total Households
97401	Eugene	1,254	6.41	120	19,568
97402	Eugene	1,259	5.84	109	21,561
97403	Eugene	275	7.05	132	3,896
97404	Eugene	705	5.43	102	12,976
97405	Eugene	869	4.54	85	19,135
97408	Eugene	219	4.29	80	5,095
97477	Springfield	836	5.39	101	15,502
97478	Springfield	770	5.36	100	14,379
<b>Eugene/Springfield</b>		<b>6,187</b>	<b>5.52</b>	<b>104</b>	<b>112,112</b>
<b>Pacific Northwest</b>		<b>270,221</b>	<b>5.33</b>	<b>82</b>	<b>5,071,461</b>

Additionally, based on zip code level sports participation data specific to the Pacific Northwest, basketball and volleyball participation rates for the Eugene-Springfield area are shown on the tables to the left. Household penetration represents total number of participants per household (shown as a percentage). Market potential represents an index of participation (where 100 is the national average). A number of Pacific Northwest zip codes were omitted from the data set relating to basketball participation; hence, the difference in the total number of households included.

The estimated number of total basketball and volleyball participants (frequent, infrequent and occasional) residing in Eugene-Springfield is estimated at approximately 22,000 and 6,000, respectively. Market potential is just above the national average of 100 and also higher than the Pacific Northwest average.

In-depth telephone interviews were completed with representatives of local and non-local indoor courts users (such as basketball, volleyball, gymnastics, and pickleball groups) in order to learn their current usage of facilities in the Eugene-Springfield area as well as to measure their interest in using potential new multi-use sports facilities. The following text summarizes the insights that were gained from each user group, their estimated existing Eugene-Springfield sports facility usage, and their estimated incremental participation that would be generated and accommodated by a potential new multi-use sports facility.

## KIDSPORTS



KIDSPORTS is a private non-profit organization that provides youth sports programs for pre-K through 12<sup>th</sup> graders in Eugene/Springfield and surrounding areas. Programs and activities are open to any child able to participate, regardless of financial status and all participants have the opportunity to play. They currently leverage indoor court space at schools throughout the 4J School District and schools in adjacent districts, such as Bethel and Springfield. However, despite being granted primary access to elementary and middle school gymnasiums, they have been finding it increasingly difficult to maintain a consistent schedule with last minute demands of the school itself taking priority.

As such, KIDSPORTS is underway with a fundraising campaign to develop a \$15 to \$20 million indoor fieldhouse consisting of approximately 44,000-square feet of gymnasium space, large enough to accommodate up to four basketball courts or 12 volleyball courts. This complex, if constructed, is expected to be able to accommodate the existing demand for indoor KIDSPORTS activity and create an opportunity to grow participation in indoor sports by as much as 25 percent.

## TRBO Basketball

TRBO Basketball is a traveling basketball program that includes teams from each high school district in Eugene and Springfield. Seasons run from April through August, September through November, and December through March. Each season includes between 40 and 50 participating teams.



Program representatives reported that they use local elementary schools and middle schools twice per week for two hour practices. The program also includes five "elite" teams for high school athletes, and these teams practice at Willamalane Center for Sports and Recreation and Lane Community College. They also host two to three 50-team tournaments per year using various middle school and high school facilities throughout the area, as well as six one-week clinics per year at Willamalane. It is important to note that TRBO does not currently host league games in the area.

Program leadership expressed an interest in a new indoor facility in the area. While they are well accommodated for practices, they would like to be able to host large tournaments more frequently and grow the existing ones that are held at Willamalane Center for Sports and Recreation. In total, officials estimate that an additional four to six courts in the area could help attract two to three additional 60-team tournaments per year.

### Eugene Family YMCA Basketball



Eugene's Family YMCA Basketball program runs leagues for athletes between the ages of nine and 18. The program's two seasons of play run during the month of May and the month of October. Recently, there were 70 teams involved in the boy's league and 30 teams involved in the girl's league. Each team in the program plays seven games per season (one to two per week) on Saturdays and Sundays. The program hosts its games at Roosevelt Middle School, the Eugene YMCA and ATA/Jefferson Middle School. Due to its limited season length and lack of practices, it is not estimated that the YMCA program would be a primary user of a potential new multi-use sports facility.

### Playground Sports Basketball and Volleyball



Playground Sports is a private recreational sports organization based out of Eugene that typically has 500 athletes involved in its eight basketball leagues and 150 athletes involved in its two volleyball leagues. Both programs run from the beginning of April through the end of June, and they also have seasons in the fall. Basketball teams play seven games per season while volleyball teams play six games per season, and both programs play all of their games at the Willamalane Center for Sports and Recreation. Program officials indicated that they are satisfied with court availability and would not likely use a potential new multi-use sports facility.

### Webfoot Juniors Volleyball



A traveling girls' volleyball club featuring approximately 18 teams (200 athletes), the Webfoot Juniors Volleyball Club is an affiliate of the Columbia Empire Volleyball Association (CEVA). The club currently uses the Sports Center at the Lane County Fairgrounds for practices. Teams practice twice per week, and host one 60-team CEVA Power League tournament per year. The Club is also involved in hosting the 96-team Presidents Day tournament that occupies the courts at the Sports Center and at the Willamalane Center for Sports and Recreation.

Local officials and CEVA representatives indicated that new indoor courts in the area would enable Eugene to attract additional CEVA tournament activity. With four additional courts at or near the Sports Center and/or Willamalane, CEVA officials stated that Eugene could likely attract two to four new 60-team Power Series events. However, it is unlikely that the Club requires additional space for practices.

### Oregon Volleyball Club



Oregon Volleyball Club is a Eugene-Springfield-based traveling volleyball club for girls ages 12 through 18. The club has 11 different teams, comprised of approximately 180 athletes. These teams practice for two hours twice per week at the Willamalane

Center for Sports and Recreation, and the club hosts two to three tournaments per year at Willamalane. It is estimated that the Club would likely participate in larger volleyball tournaments that could be held in Eugene as a result of a potential new multi-use sports facility. However, they do not require additional practice space at this time and they gave no indication of hosting additional tournaments in the future.

### Eugene Parks and Recreation



Eugene Parks and Recreation runs one men's basketball league and 17 volleyball leagues. The basketball league features seven to eight teams and occurs between mid-November through mid-January. It is estimated that teams play ten to 12 games each. Teams play on 12 different courts throughout Eugene. Volleyball games are played on approximately 30 different courts throughout the city, with seasons running between February

through March, May through July and August through September. It is estimated that teams play eight to ten games each per season.

### Eugene Women's Volleyball League



Eugene Women's Volleyball League is a recreational volleyball league for adult women that has seasons in the fall, winter and spring. There are approximately 12 teams that participate in each season. Teams play 33 games in the fall, five games in the winter,

and five games in the spring. Local representatives could not specify whether the League would be interested in using a potential new multi-use sports facility. Games are currently held at the Lane County Fairgrounds' Sports Center.

### Gametime Basketball



Gametime Basketball is a traveling basketball club for youth athletes in grades four through eight. The club features five teams (one for each grade level) comprised of an estimated 60 total athletes. The club holds practices at the Willamalane Center for Sports and Recreation once per week throughout the year, but they primarily play league games and tournaments in other cities throughout Oregon. It was determined that Gametime is not in need of additional courts space for games or practices.



## National Academy of Artistic Gymnastics



### **National Academy of Artistic Gymnastics**

National Academy of Artistic Gymnastics is a gymnastics shop in Eugene that offers classes for traveling competitive programs to athletes ages six and up. They currently use their own facilities for daily practices during the week and

organization representatives indicated that they would not be interested in utilizing a potential new indoor sports facility in the area for practices. However, they do have four annual events that they would be interested in hosting at a new indoor facility. Three of these events are smaller and currently take place at Northwest Christian High School's gymnasium. These events are one day each and feature approximately 150 athletes (70 percent of which are from out of town) and 400 spectators. Their large annual event takes place at Willamalane Center for Sports and Recreation and takes place over three days, features over 1,000 athletes from around the country, and attracts over 3,000 spectators. Officials stated that a potential new indoor sports facility would accommodate expected growth of the large annual event as well as serve as a marketing tool that would attract additional non-local athletes to the three smaller events.

To host these events, a new facility would have to have at least 38,000 square feet of flat floor space with at least one diving curtain or wall in the middle, bleacher seating for 700, parking for at least 250 cars onsite, two to three 800-square foot hospitality/meeting rooms, a kitchen facility, at least 200 hotel rooms within ten minutes, and various food and entertainment options nearby.

## Emerald Valley Pickleball Club



The Emerald Valley Pickleball Club offers organized pickleball practices and games at Willamalane Center for Sports and Recreation every day from 9:00am until noon. The league is comprised of approximately 50 athletes between the ages of 55- and 80-years old, which has grown substantially from the 20 athletes that were involved in the league in 2013. Organization officials indicate that there is a lack of available indoor courts for pickleball in Eugene, and that most of its members are closer to that area. They would be highly interested in using a potential new indoor sports facility

for daily practices and would displace approximately half of the current membership that uses Willamalane to new courts in Eugene. Western Oregon Pickleball also hosts an annual pickleball tournament (the Western Oregon Hop Volley Pickleball Championships) at the Eugene Swim and Tennis Club that attracts nearly 170 athletes (75 percent of which are non-local), a figure that significantly grows year over year.

To host practices as well as the annual Championships, Western Oregon Pickleball representatives recommend the development of at least two indoor pickleball courts (which equates to one indoor tennis court) as well as eight outdoor courts (which equates to four outdoor tennis courts). These facilities would require parking for at least 100 cars onsite, and would require at least one permanent indoor bathroom and one drinking fountain for each two indoor and outdoor pickleball courts.

## Potential Non-Local User Groups

### *Basketball Demand*

Generally, State and regional basketball planners noted the lack of “big box”, multi-court facilities in the Eugene area. Planners are generally satisfied with the site and quality of the courts at Willamalane and various local high schools/middle schools, but there is moderate to significant opportunity to add a multi-court facility to Eugene.

Tournaments typically feature 12 athletes and coaches per team, and 1.5 spectators per athlete. It was noted that a potential facility should include 6 to 8 courts, bleacher seating for 50 to 60 people per court, bathroom facilities, space for temporary concessions, lobby/registration space, small meeting facilities, dividing walls for courts, and at least five feet of distance between courts. Further, it was noted that planners prefer a facility that would be easily accessible from or adjacent to Interstate 5 and would require at least 100 to 150 hotel rooms to be within 15 minutes of facility.

AAU Boys Basketball (age groups from 5 to 18) would be highly interested in regularly frequenting a new multi-court facility in Eugene-Springfield. Organization representatives have even considered building and programming a 6-court facility themselves. With 6 to 8 courts, AAU would practice there from 4 to 9pm three days a week and bring a 60-team tournament there every weekend from March through September.

Portland-based HoopSource Basketball would be interested in organizing 8 to 10 100-team regional tournaments in the Eugene area per year, with 200 associated room nights per event. Oregon Amateur Basketball has moderate to strong interest in using a new 6- to 8-court facility in Eugene during fall and winter months. Oregon Amateur Basketball would split 60- to 80-team tournaments between the potential new facility and local high school gyms a minimum of six times per year.

### *Volleyball Demand*

If a new facility were developed featuring total seating (temporary chairs are fine) for 1,000 within the facility and 500 parking spaces were developed, USA Volleyball and CEVA would be interested in bringing two to four more events to the area. These events would be two days long, feature 60 to 70 teams (12 athletes/coaches per team), 1.5 spectators per athlete and approximately 500 total room nights each. Additionally, the University of Oregon is highly interested in expanding the 232-team Matt Hartner Memorial Tournament and creating two new 50-team tourneys. Other planners expressed a desire for Willamalane to add four to eight volleyball courts, or the development of 15 new courts in the Eugene market.

Typically, it is possible to fit two youth/tournament volleyball courts per youth/tournament basketball court. Regional club tournaments are usually held between January and April, typically two days in length with an average of 50 to 75 teams. National volleyball events are typically hosted in large convention centers/exhibition halls with more than 100,000 sf of flat space to accommodate up to 200 volleyball courts.

### *Other Indoor Court Sports User Demand*

National Academy of Artistic Gymnastics would strongly consider relocating from Willamalane to a new facility for its annual Emerald Team Challenge and would likely relocate three smaller competitions from Northwestern Christian College’s gyms. This event would require 38,000 to 40,000 square feet of flat floor space (about 7 or 8 basketball courts) with 25-ft ceilings as well as bleacher seating for 700 and parking

for 250 vehicles. It would total six days of activity, 6,000 athletes and attendees, and over 1,000 room nights. Additional national events could feature 1,000 to 1,500 athletes and 700 to 1,800 hotel room nights. Further, there is limited demand for additional wrestling facilities in Oregon.

### Summary of Indoor Court Demand

- Overall demand conclusions:
  - Moderate to strong interest levels measured among potential local indoor facility user groups.
  - More moderate interest levels measured among potential non-local indoor facility user groups.
  - Indoor sports demand tends to run year-round, with somewhat higher concentrations of demand from October through March.
- Local demand observations:
  - Potential exists to service local demand and grow existing events with the addition of court space in Eugene-Springfield. There is a general consensus among indoor sport organizers that the Lane County area has a lack of overall gym space.
  - KIDSPO RTS utilizes eight local schools per weekend (mostly elementary schools), and often encounters scheduling issues with little to no warning.
  - A moderate number of area participants in basketball and volleyball would help to fill weekday and off-season usage, though there would likely be some days of the week with little to no utilization during the off-seasons. These periods could potentially be filled by local adult rec leagues.
  - Growing local volleyball participation has led to increased demand for practice and game space.
- Non-local demand observations:
  - Potential exists to draw state-wide and regional tournaments due to lack of competing facilities in the market with a facility that has six full-sized basketball courts in Eugene. However, national and regional organizers noted that adding courts at the Willamalane Center for Sports and Recreation in Springfield (which already features an inventory of six basketball courts) would qualify the market for large regional and national events.
  - State and regional basketball planners noted the lack of “big box”, multi-court facilities south of Portland, and also expressed the notion that the development of a convention center facility could be a potential solution for meeting unmet court space demand.
  - Tournament organizers typically host events in markets that have an established destination that both the players and parents can enjoy, and organizations felt that the University presence in Eugene-Springfield helps the city fit this model well.

## Aquatic Users

Swimming is the leading individual sport in the U.S. Nationwide, there are approximately 21 million individuals who are characterized as “fitness” swimmers and 2.4 million individuals that swam competitively at least once within the past year. Of these amounts, approximately 17 percent (3.6 million) were considered frequent participants, having swum more than 100 times in the last year. Of the 2.4 million competitive swimmers, approximately 37 percent (882,000) were considered frequent participants, having participated 100 or more days in the last year. Approximately 35 percent (7.5 million) of “fitness” swimmers and 63 percent (1.5 million) competitive swimmers participated at least 50 times.

Moreover, based on SMGA statistics for the Pacific region, it is estimated that there are nearly 2,800 Lane County residents over the age of six that swam more than 110 times in the past year, and over 30,700 of these types of participants within a 180-minute drive time of the Eugene-Springfield area.

The following summaries detail insights that were collected from conducting in-depth phone interviews with potential local and non-local users of new Eugene-Springfield aquatic facilities.



### Eugene City Water Polo



Eugene City Water Polo features between 65 and 70 amateur water polo athletes in the area during fall and winter seasons and between 100 and 120 athletes during the summer season. They currently use the Amazon Pool, Echo Hollow Park Pool Complex and the diving well at the Sheldon Pool and Fitness Center for practices and games. Organization representatives noted that they enjoy using Amazon, but that

Echo Hollow (which has only six lanes) and Sheldon are too small for water polo regulations. They added that a new indoor eight-lane 25-yard pool in the area would represent a great asset for their league, and that it would likely help them sustain their recent growth in participation over the last several years. Organizers felt that a new pool could help them double the local number of participants in the sport within five years.

Eugene City Water Polo officials also reported that they would be interested in using a new indoor Eugene-Springfield pool five days per week for two hours per day for practices. They would also like to bring four additional water polo tournaments to the area (two in the winter and two in the summer). Each of these would likely feature 18 to 24 teams, with 90 to 95 percent of participating teams coming from out of town.

### Team Eugene Aquatics

Team Eugene Aquatics is the Eugene-Springfield area's largest swim club and features 180 athletes between the ages of 10 and 18. However, due to the lack of available swim lanes in the area there



are 60 athletes who are on a waiting list to join the program. The club currently uses the 25-yard Sheldon Pool, the two 25-yard pools at Echo Hollow Park, and four lanes at the 25-yard pool at the YMCA for

practices. Sheldon and Echo Hollow are also used to host three 500-athlete short course competitions per year during the winter. Team representatives noted that they practice every weekday all year long with the exceptions of several weeks in August and December, and that they currently have 10 to 11 swimmers per lane for practices. They added that six to seven swimmers per lane is optimal for efficient practices and that a new pool in the area would help support this ideal practice model. Also, a potential new 50-meter pool could enable Team Eugene to start a U.S. Masters program for swimmers in the area over the age of 17.

Team representatives also stated that they use the 50-meter outdoor Amazon Pool to host one 650-athlete long course meet per year during the summer. However, they noted that Amazon's dimensions are not conducive to hosting long course tournaments, and that one end of the pool is wider than the other. Team officials said that their ideal new facility would be a 50-meter pool with ten lanes, one to two floating bulkheads, bleacher seating for 500, and significantly more deck space than what is available at the current Eugene-Springfield aquatic facilities. It is estimated that this potential new pool would be used every weekday from 8:00am until 4:00pm by the community, from 4:00pm until 10:00pm by Team Eugene and local high schools for practices, and could help attract two to three new statewide swim competitions in the winter, another two in the summer, and one to two U.S. Masters Swimming events. Each of these new competitions would likely attract 400 to 600 non-local swimmers to the Eugene-Springfield area.

### Emerald Aquatics



Emerald Aquatics is the Eugene-Springfield area's second largest swim program. They offer youth programs for 10-U through 18-U age groups as well as a Masters program for athletes 18 and older. Emerald Aquatics currently uses Amazon Pool and Echo Hollow Pool for youth practices and competitions, as well as Willamalane Pool for the Masters program, but local officials felt that the club would likely be interested in using a potential new aquatic facility in the Eugene-Springfield area. They added that the program has grown considerably in recent years, and that in the near future they may face issues with the size and availability of existing Eugene-Springfield aquatic facilities.

### Potential Non-Local User Groups

Swim meet organizers indicated that there is a moderate lack of 50-meter competitive pools throughout the state of Oregon. Local, regional and national organizers generally preferred indoor aquatic facilities.

In general, organizers noted the following facility requirements: one locker room each for men and women; enough deck space for portable bleacher seating (20-25 feet would be ideal); space for temporary concessions; restroom facilities in addition to locker room facilities for attendee use; PA system; seating for a minimum of 500 attendees; and, digital scoreboard and timing pads.

The deeper the pool the better for competition; minimum of 4½ foot depth to host competitions, standard for a competition pool is two meters (approximately seven feet). A 50+ meter pool with bulkheads would allow for a deep end that can accommodate synchronized swimming, water polo, and/or diving competitions. An additional pool for warm-up/cool down with 8 lanes for competition can also be utilized as a warm water pool for swimming lessons and recreational swimming. Local and regional organizers recommended the development of a "bubble" that surrounds the pool to avoid the substantial costs associated with maintaining a traditional indoor facility.



## Summary of Aquatic Facility Demand

- Overall demand conclusions:
  - Moderate to strong interest levels measured among potential swimming user groups.
- Local demand observations:
  - Strong local demand exists for a new natatorium facility. Local facilities are currently booked out daily for youth club practices, and lack of facilities is constraining the sport's local participation.
  - Due to the number of Eugene facilities, the Team Eugene youth club has reached capacity (over 180 swimmers between 10 and 18) and has over 60 swimmers on a waiting list.
  - Sheldon High School's pool is frequently used for youth competitions, but local representatives indicated the need for additional seating and deck space in a competitive facility.
  - A new 8- to 10-lane 25-yd facility could likely be utilized every day by local groups for practices between 8:30 am and 10:00 pm.
  - It was noted that a new facility would also likely enable the development of larger Masters (18+) participation and competitions in the Eugene-Springfield area.
- Non-local demand observations:
  - Development of 8-lane 50m pool with two floating bulkheads could attract three new annual long course competitions to the area, including a USA-affiliated state tournament (1,100 athletes), a regional tournament (700 athletes) and a central Oregon meet (450 athletes). These would attract approximately 1.5 spectators per athlete and would occur over three days.
  - New facility would likely attract two to three new statewide short course competitions. These would feature 400 to 500 athletes per event, with 1.5 spectators per athlete, and would take place over three days.
  - Partnerships with local universities often assist with the significant investment needed for a 50-m pool. However, local stakeholders indicated the University of Oregon's lack of interest/demand for a new pool facility.



## Track Users

According to the National Federation of State High School Associations, there are nearly 1.1 million athletes nationwide who participate in outdoor high school track and field programs. Further, there are just less than 140,500 high school athletes involved in indoor programs, which is partially attributable to the fact that only 20 state high school associations run indoor competitions. In all, there are approximately 16,400 schools around the country with outdoor track programs, and just over 2,800 that participate in indoor competitions.

Additionally, based on zip code level sports participation data specific to the Pacific Northwest, track and field participation rates for the Eugene-Springfield area are shown below. Household penetration represents total number of participants per household (shown as a percentage). Market potential represents an index of participation (where 100 is the national average).



Zip Code	City	Participants	Household Penetration	Market Potential	Total Households
97401	Eugene	540	2.76	77	19,568
97402	Eugene	695	3.22	90	21,561
97403	Eugene	198	5.09	142	3,896
97404	Eugene	418	3.22	90	12,976
97405	Eugene	529	2.77	77	19,135
97408	Eugene	125	2.46	69	5,095
97477	Springfield	470	3.03	85	15,502
97478	Springfield	554	3.85	107	14,379
<b>Eugene/Springfield</b>		<b>3,529</b>	<b>3.15</b>	<b>92</b>	<b>112,112</b>
<b>Pacific Northwest</b>		<b>177,025</b>	<b>3.49</b>	<b>76</b>	<b>5,071,461</b>

The estimated number of total track and field participants (frequent, infrequent and occasional) residing in Eugene-Springfield is estimated at approximately 3,500. Market potential is just under the national average of 100 but higher than the Pacific Northwest average, with a significantly high index measured in the zip code containing the University of Oregon (as expected).

Track and field complexes are increasingly in-demand in major metropolitan areas. The growth of indoor track programs at high schools indicates that there is demand for premier indoor facilities. Many state-of-the-industry indoor track facilities have at least six lanes on a banked track. The spectator capacity ranges from 3,500 to 5,000. Eugene's well-known track and field brand provides would likely provide a strong platform to leverage a new track (indoor or outdoor) facility in the Eugene-Springfield area.

It is essential that the track and field complexes have the potential to accommodate the range of track meet events. Discussions with track facility owners indicated that premier facilities have spaces for events such as the long jump, triple jump, pole vault and 55/60-meter dash.

A process of in-depth telephone interviews and extensive research was also completed to estimate the amount of existing facility usage and potential unmet demand among local and non-local track and field users in Eugene-Springfield. These findings and estimates are summarized below.

## Northwest Christian University



Local officials reported that Northwest Christian University's track and field team is in need of a track for practices and meets. It was estimated that they would likely utilize an outdoor track facility during the spring and fall seasons every day for up to two hours per practice. Cascades Collegiate Conference (the competitive conference that Northwest Christian University is a part of) also indicated that they would be interested in hosting a meet at a potential new outdoor complex in the Eugene-Springfield area. Moreover, NCU would likely use a new indoor track facility during the winter for daily practices, and could potentially host indoor collegiate meets.

## Track City Track Club



Track City Track Club is an organized amateur track club for 8-U through 18-U age groups with approximately 50 to 100 participants from around the Eugene-Springfield area. Practices and meets are held twice per week at Sheldon High School's track and field facility, and the Club's season runs from March through the end of July. Club officials expressed satisfaction with the availability of high school tracks in the area and stated that they would likely not be interested in using a potential new indoor or outdoor track facility.

## Team Run Eugene



Team Run Eugene runs a youth program that partners with several other youth running organizations in Eugene-Springfield, and also has a traveling Elite program with 15 to 20 elite level athletes. It is not estimated that the Club requires additional tracks or other facilities for practices or meets, as local officials did not cite them as potential users of a new indoor or outdoor track complex. However, their Elite program would likely participate in indoor or outdoor non-youth meets that would be held at a potential new track complex.

## Oregon Track Club



The Oregon Track Club is a volunteer-based organization that offers fitness programs and youth activities for the Eugene-Springfield community as well as opportunities for organized competition via the traveling Oregon Track Club Athletics Team program. It is a membership-based organization with over 2,000 individual members, and all age groups are eligible to participate in at least one of the Club's various programs. The Athletics Team practices once per week at various locations throughout the area for distance workouts, and the Team will occasionally use the local high school track facilities for sprint work. The Club also includes an Elite program for elite track athletes who are 18 and older.

The Club also hosts the Prefontaine Classic Diamond League Meet and the Hayward Classic Meet every year at Hayward Field. Due to the costs of renting out Hayward Field, organizers of the Prefontaine Classic would be moderately interested in utilizing a new outdoor track facility in their area to host the event.

## Emerald Valley Track Club



Emerald Valley Track Club is a non-profit running club with approximately 80 athletes involved in its fall cross country program and 125 athletes in its spring track and field program. The track and field program currently uses the track at South Eugene High School four times per week for practices during the spring season, which runs from mid-March through late July. They do not presently host any invitational tournaments in Eugene-Springfield, however.

Club officials expressed interest in displacing their usage of South Eugene High School's track to a potential new outdoor Eugene track facility. They added that a new track would likely help their program grow by 20 to 30 percent within several years, and that it would enable them to host large invitational track meets. In regards to the potential development of an indoor track, officials expressed moderate to significant interest in creating a winter program that would run from November through February. Winter Club participants would practice twice per week, and the club would assist in developing and hosting two to three indoor track tournaments that would likely attract 300 or more non-local runners.

## Potential Non-Local User Groups

A new outdoor track would likely bring in small regional track meets every weekend (high school sectional meets), one to two state/regional meets, and three to four Division III conference track meets. Local and statewide track organizers are also highly interested in the potential for an *indoor* track facility. Further, Oregon School Activities Association reports that an indoor track facility could host statewide and regional high school meets every weekend from December through February, potentially generating 200 to 400 hotel room nights for each event. It was noted by USA Track and Field representatives that a new indoor Eugene-Springfield facility would have moderate potential to attract 1 to 2 NCAA D-1 indoor track meets per year, in addition to 1 indoor regional USA meet.

In order to remain competitive for, and attract the aforementioned events, a new outdoor facility should include lights, two to three jumping pits, two to three throwing pits, seating for 500 and a storage facility for equipment onsite.

## Summary of Indoor Track Facility Demand

The following are key observations made from interviews with potential track facility users:

- Overall demand conclusions:
  - Moderate interest levels measured among potential track user groups.
  - Outdoor track season for competitions occurs from March through June, with clubs participating in additional training from August through October.
  - Indoor track season takes place from the beginning of December through the end of February. Indoor facilities are also often used for by athletes for training during the rest of the year.
- Local demand observations:
  - Local users and stakeholders such as Oregon Track Club, Emerald Valley Track Club, and Eugene high schools have expressed considerable interest in the addition of a new track facility.
  - Though Hayward field is world class in quality, the overall track inventory of the area for a community the size of Eugene is lacking.
  - Local and regional users indicate that a new outdoor track would be consistently used from March through October for Northwest Christian University practices, in addition to high school section and statewide meets.
  - Proposed site at Sheldon High School is seen as highly viable by local organizers.
- Non-local demand observations:
  - Potential users recommend a 200 meter banked track; two (2) horizontal jump run ways; two (2) pole vault run ways; eight (8) lane 60-meter dash with hurdles; seating for at least 2,500 spectators; and, an area for athletes to warm-up and practice.
  - It was also noted by organizers that MONDO track surfacing would be required to qualify a potential new indoor track facility for NCAA Division I and USA events.
  - Given the relatively short two to three-month season length of indoor track and field, representatives also stressed the importance of maximizing the indoor space to accommodate other sports. Most representatives were open to a facility with a demountable track that would be utilized during track and field's season but removed in the off-season to accommodate other sporting activities.
  - A 300-meter indoor facility would not be able to attract major national events, though it would be able to accommodate a larger amount of activities within the track's ring (such as football practices and/or indoor soccer).
  - Given the recent success and significant event activity at the temporary "House of Track" indoor track facility that was constructed inside a warehouse in Portland, it was importantly noted by regional and national track and field organizers that a potential indoor track facility in or near the Portland area would be highly preferred for their events. If a permanent facility were to be constructed in or near the Portland area, this would likely significantly impact the operational success of a potential Eugene or Springfield facility.

## Conclusions

The results of the market demand analysis conducted for this study suggest that high quality baseball/softball and soccer/multisport fields represent the greatest areas of market need in the Eugene-Springfield area. A single, high quality complex could be designed to deliver these fields to generate sustainable revenues, satisfy unmet local needs, allow for the growth of local sports and recreation programming, and generate incremental economic impact through the attraction of new non-local tournaments.

Another area of need exists for indoor basketball/volleyball court space. Emerald KIDSPORTS services the entire 4J School District, utilizing local gym space within various elementary and middle schools. However, school programming takes priority over outside group usage, which occasionally results in KIDSPORTS being bumped with little or no notice from previously scheduled games. This, combined with the number of kids that Emerald KIDSPORTS has to turn away on an annual basis has resulted in their efforts to pursue a 44,000-square foot indoor fieldhouse, with four basketball courts that could be converted into up to 12 volleyball courts. While demand for indoor multipurpose courts throughout the Eugene-Springfield market among other organizations appears to be accommodated by the various high schools and middle schools, it will be important moving forward to pursue consistent facility access to recreational programs such as KIDSPORTS, without directly competing against the Willamalane Center for Sports and Recreation.

The area also presently has limited facility options for swimming. There are vocal groups in the local area that have indicated strong interest in a new natatorium facility, and the research suggests that interest in swimming programs may grow materially over time should a new facility be developed. However, in terms of satisfying the secondary objectives of this potential project—specifically, the need for a facility investment that works to maximize non-local participation and attendance and associated economic impacts—a natatorium project would be lower on the list in terms of investment priority (relative to an outdoor complex and indoor court facility). The number of competitions that draw traveling swimmers, and the number of participants per competition, tend to be of a significantly lower level throughout the region and country than associated with other sports, such as baseball, softball, soccer, basketball, volleyball, etc.

There appears to be sufficient supply of outdoor tracks throughout the Eugene-Springfield market to accommodate existing demand for local practices and competitions. However, there could be an opportunity to better meet state and regional market demand, as well as compete for certain national meets with the development of an indoor track facility. Eugene has a very strong orientation in the track and field community and marketplace, in terms of programs, participation, and industry/corporate presence. Eugene is widely referred to as “Track Town, USA” throughout the track and field community and beyond. The University of Oregon and local high schools have sophisticated programs and quality outdoor facilities. However, unless there is interest by the University in some type of partnership, this could be best served to be considered a secondary priority, as associated construction and operating costs, economic impact limitations, and niche orientation of such a facility suggest that a lower return-on-investment project (in terms of unmet market demand and benefit-to-costs).

Extreme sports and other alternative/niche sports and recreation were researched and evaluated through this analysis, as well. There are a number of new facility development/investment options that could be possible to address these segments; however, the “return-on-investment”—measured in terms of the previously stated objective of this study that focuses on generating new economic impact and addressing current unmet facility need for local residents, relative to costs—does not presently justify strong consideration for their inclusion in the proposed project at this point in time.

## 5.0 FACILITY PROGRAM AND UTILIZATION ANALYSIS

The purpose of this chapter is to build off the market demand research, analysis and conclusions related to potential new multi-use sports facilities in Eugene-Springfield to evaluate market indicated facility development options and subsequent induced utilization. Recommendations regarding potential facility components and other aspects evaluated in this chapter are based on the results of the market analysis, including the historical, current and projected demographic and socioeconomic characteristics of the market area, an assessment of existing sports and recreation facilities in the marketplace, characteristics of comparable sports facility developments throughout the country, and discussions with potential users of new/enhanced sports facilities in the Eugene-Springfield area.

### Market Indicated Program

Based on the results of in-depth interviews with individuals representing local, regional and national sports organizations, as well as discussions with local project stakeholders, the demographic and socioeconomic characteristics of the local and regional market and current participation levels in youth sports, it is estimated that a multi-use sports complex in Eugene-Springfield with baseball, softball, soccer, lacrosse and rugby fields would best meet the needs of the local and regional community. It is recommended that the complex focus on the delivery of quality outdoor fields at a single location as an initial strategy, with planning considerations for future field expansion and/or indoor sports and recreation facility development at the selected site. An analysis of site/location issues would be performed under Phase Two of this study. Additional demand was noted for other types of sports facilities that could be realized through expansion of existing facilities and/or partnerships.

#### 1. Core Complex

Understanding that the goals of the proposed multi-use sports complex are to meet the needs of local citizens, drive new revenues, and generate economic impact through new visitation and associated spending, a building program recommendation has been developed consisting of ten to twelve triangle fields (i.e., baseball and softball) and four to six rectangle fields (i.e., soccer, lacrosse, rugby, field hockey, and football). Specifically:

- Rectangle fields = 4 to 6 multi-sport fields:
  - synthetic turf.
  - 345' x 210' per field.
  - no fixed seating required.
- Triangle fields = 10 to 12 baseball/softball fields:
  - 2 baseball fields with adjustable base lengths (including 60', 65', 70', 80' and 90' bases) and fences (up to 320' fences with available portable fencing), synthetic turf, and seating for 500 to 600 spectators at each field.
  - 4 to 6 softball/youth baseball fields utilizing a wheel configuration with portable mounds available and adjustable base lengths (including 60', 65', 70' and 80' bases)



and fences (200 to 300' fences with available portable fencing), synthetic turf, portable mounds and seating for 500 to 600 spectators at least two of the fields.

- 4 to 6 flexible youth baseball fields with synthetic turf infields and grass outfields (or alternately all synthetic) with adjustable base lengths (including 60', 65', 70' and 80' bases) and fences (275'-280' fences with available portable fencing).
- Additional characteristics/amenities:
  - Lighting for all fields to maximize utilization periods.
  - Restroom and concession facilities.
  - Pavilion and field operations building.
  - Warm-up areas.
  - Park entrance signage.
  - Paved parking lot, parking capacity for minimum of 75 spaces per field.
  - Option to program a 400-meter track encircling one multisport field (plus bleacher seating).
- Site acreage requirements:
  - Minimum requirements:
    - Rectangle = 1.7-2.1 acres per field (195'-225' x 330'-360' with minimum 10' clearance on all sides).
    - Triangle = 1.2 acres (little league), 3.8-3.85 acres minimum (official).
  - Based on a review of state-of-the-industry complex developments, actual per field acreage deployment (including parking, circulation, support facilities, etc.):
    - Rectangle = 4.5-5.0 acres per field.
    - Triangle = 6.0-6.5 acres per field.
  - Estimated Eugene-Springfield Core Complex site requirements = 75-100 acres.

Although synthetic turf fields can cost upwards of \$800,000 to install (versus \$300,000 for natural grass), annual maintenance for a synthetic turf field can cost approximately \$10,000, while natural grass can cost upwards of \$40,000 per year for rectangle fields and \$80,000 or more per year for tournament quality baseball fields (grass plus dirt). Fast moisture draining, recovery and durability of synthetic fields result in a significant reduction in cancelled tournaments and games due to inclement weather relative to natural grass/dirt fields. This leads to enhanced marketability for tournaments and higher, and more consistent, use/attendance levels. Synthetic fields also are estimated to increase the number of playable hours by approximately 50 percent due to the ability to withstand weather conditions, and have a useful life of between 10 and 15 years. Once synthetic turf fields are in need of replacement, costs to re-install are half of the initial costs as the foundation, base, and drainage system can be re-used.

## 2. Other Facilities

Beyond the outdoor-oriented field complex, the market analysis indicated that unmet local and non-local demand exists for additional indoor facilities. While these facilities could be developed at the site of the outdoor complex, there may be opportunities to expand existing facility product elsewhere and/or involve other partners to more efficiently and successfully achieve their development.

### *Additional Courts*

- There are indications of unmet demand in certain peak time periods for indoor court space (for volleyball and basketball uses, most prominently). It is estimated that there is demand for additional courts in the Eugene-Springfield market, largely to accommodate unmet local demand. These courts should involve a multi-court facility scenario and should meet a minimum number of courts in one facility to achieve optimal marketing and operational efficiencies.
- It is believed that two logical opportunities exist for development to better match market demand. The first would involve an expansion of the Willamalane Center for Sports and Recreation to integrate a minimum of two additional hardwood court (to bring its total number of full sized courts to eight). Additional hardwood courts would require approximately 7,000 square feet per court (not including support space). It is believed that expansion of the Willamalane Center would represent a logical opportunity to leverage a prominent existing sports/rec facility product and would bring court supply into better alignment with local demand.
- The second opportunity involves supporting the 44,000-square foot fieldhouse, proposed by KIDSPORTS, that would offer up to four basketball courts (that could be converted to as many as 12 volleyball courts).
- While there are advantages to both court development scenarios, the Willamalane Center expansion scenario would represent the preferred scenario if only one of the two projects are pursued, as it best leverages existing product/investment and would result in a larger single facility of court offerings. However, there are market indications that both developments could individually serve important segments of unmet local market demand in the Eugene-Springfield community.

### *Indoor Track Facility*

- Eugene has a very strong orientation in the track and field community and marketplace, in terms of programs, participation, and industry/corporate presence. Eugene is widely referred to as "Track Town, USA" throughout the track and field community and beyond. The University of Oregon and local high schools have sophisticated programs and quality outdoor facilities. However, the local area does not presently offer a high quality indoor track facility to complement its outdoor facilities.
- A state-of-the-industry indoor track facility that would be believed to be appropriate for the Eugene-Springfield market would consist of an indoor facility housing a 200-meter banked Mondo track with six lanes and areas for the high jump, long/triple jump, pole vault, and a 55/60 meter dash runway on the infield. When not being utilized for track and field-oriented activities, the infield could also be developed to integrate four court surfaces to accommodate basketball and volleyball uses, as well as flex space to utilize during inclement weather or as warm-up space.
- A logical partner (in terms of use, funding, and brand) would be the University of Oregon, with a facility development that would be located at or near Hayward Field. Should there be interest by the University in partnering on a project like this, an agreement could be crafted to protect availability for non-University uses.

- There may be an opportunity to develop a stand-alone indoor track facility elsewhere in Eugene-Springfield without major University funding involvement; however, a number of funding, use and branding synergies would likely be missed.

## **Analysis of Existing and Induced Market Utilization**

A detailed utilization model was developed to consider a large number of variables and inputs to analyze each sport/use for each facility development scenario under review. For instance, when considering different types of usage (i.e., use from local leagues/clubs versus non-local tournaments/meets versus clinics/camps/lessons versus open recreation, etc.), separate assumptions were used for the development of usage and attendance (participants and spectators).

As an initial step in assessing the projected utilization associated with a potential Eugene-Springfield sports facility/complex, a detailed analysis was conducted to estimate existing use, participation and attendance for each potential development scenario under consideration. Next, based on discussions with local sports organizations, regional and national tournament organizers, a review of sports participation trends, and a review of the historical utilization levels of comparable facilities we have developed an estimation of incremental induced market demand for the recommended Multi-Use Sports Complex in Eugene-Springfield, assuming the development of facilities, as previously outlined, able to accommodate such demand.

This analysis focuses on the net inducement of new/expanded local and non-local sports league and tournament play in Eugene-Springfield by virtue of the development of the proposed new Multi-use Sports Complex as outlined earlier in this chapter. A portion of this new induced market will be accommodated at the new Multi-Use Complex, while others will be accommodated at other local facilities through the assumption of new periods of availability as some existing demand shifts to the new Facility. Therefore, the incremental induced demand reflects the net effect in the Eugene-Springfield marketplace as a result of the recommended Multi-use Facility development and annual operation. Phase Two of this study would involve modeling the financial operations and economic impacts specific to one or more facility development scenarios (determined through discussions with the City).

Estimated existing market utilization for Eugene-Springfield triangle field primary users (i.e., baseball and softball) is presented in Exhibit 1. The analysis focuses on game utilization by each user group/type. Practices, clinics, camps, and other rentals provide additional secondary occupancy, and would be included in the financial analysis conducted under the potential Phase Two of this study.

**Exhibit 1**  
**Estimated Existing Market Utilization – Baseball/Softball Fields**

ESTIMATED EXISTING MARKET UTILIZATION Eugene/Springfield Triangle Field Primary Users													
Existing Usage:	Number of Tournaments	Number of Teams	Average Participants Per Team	Total Players	Games Per Team	Total Player Attendance	Spectator Attd. Factor	Total Spectator Attendance	Total Attendance	Local %	Non- Local %	Total Local Attendance	Total Non-Local Attendance
Leagues:													
Willamette Valley Babe Ruth		96	13	1,288	20	25,760	2.0	51,520	77,280	60%	40%	46,690	30,590
Eugene Little League		23	13	289	13	3,757	2.0	7,514	11,271	100%	0%	11,271	0
East Lane Little League		36	13	468	10	4,680	2.0	9,360	14,040	100%	0%	14,040	0
American Legion		2	18	36	16	576	1.5	864	1,440	95%	5%	1,368	72
Eugene Little League Softball		14	12	168	18	3,024	2.0	6,048	9,072	100%	0%	9,072	0
East Lane Little League Softball		18	12	216	10	2,160	2.0	4,320	6,480	100%	0%	6,480	0
Eugene Lightning (ASA Softball)		5	14	70	0	0	2.0	0	0	100%	0%	0	0
KIDSPORTS		125	15	1,856	8	14,848	2.0	29,696	44,544	90%	10%	40,090	4,454
Willamalane Parks and Rec District		80	13	1,000	12	12,250	0.5	6,125	18,375	95%	5%	17,456	919
ASA Co-Ed & Women's Softball		0	14	0	0	0	1.5	0	0				
City of Eugene Adult Leagues		237	12	2,844	8	22,752	0.5	11,376	34,128	90%	10%	30,715	3,413
Subtotal:		636	13	8,235	11	89,807	1.4	126,823	216,630	82%	18%	177,182	39,448
Tournaments:													
Willamette Valley Babe Ruth	5	117	13	1,521	3.7	5,616	2.0	11,232	16,848	20%	80%	3,370	13,478
Eugene Little League	0	0	13	0	0.0	0	2.0	0	0	20%	80%	0	0
East Lane Little League	1	36	13	468	1.8	819	2.0	1,638	2,457	100%	0%	2,457	0
American Legion	1	10	18	180	6.0	1,080	1.5	1,620	2,700	10%	90%	270	2,430
Eugene Little League Softball	0	0	12	0	0.0	0	2.0	0	0	20%	80%	0	0
East Lane Little League Softball	1	18	12	216	1.8	378	2.0	756	1,134	100%	0%	1,134	0
Eugene Lightning (ASA Softball)	0	0	14	0	0.0	0	2.0	0	0	20%	80%	0	0
KIDSPORTS	3	125	15	1,856	2.3	4,301	2.0	8,602	12,904	90%	10%	11,613	1,290
Willamalane Parks and Rec District	0	0	13	0	0.0	0	0.5	0	0	95%	5%	0	0
ASA Co-Ed & Women's Softball	2	32	14	448	6.0	2,688	1.5	4,032	6,720				
City of Eugene Adult Leagues	0	0	12	0	0.0	0	0.5	0	0	90%	10%	0	0
Subtotal:	13	338	14	4,689	3.2	14,882	1.9	27,880	42,763	60%	40%	25,564	17,199
Total Existing:	13	974	13	12,924		104,689	1.5	154,703	259,393	78%	22%	202,746	56,647

As shown in the exhibit above, there are more than 600 teams and 8,200 players currently utilizing baseball/softball fields throughout the Eugene-Springfield market for league games. This resulted in an estimated 216,600 people attending the more than 6,900 games played throughout a typical year, of which, approximately 18 percent (more than 39,400 people) originated from outside of the cities of either Eugene or Springfield. Willamette Valley Babe Ruth baseball generated the most total attendance (approximately 77,300) and non-local attendance (nearly 30,600), while the City of Eugene's Adult Leagues and Emerald KIDSPORTS accommodated the most total players, with approximately 2,800 and 1,900, respectively.

A total of 11 tournaments occur at Eugene-Springfield baseball/softball fields annually, including five through Willamette Valley Babe Ruth, three through Emerald KIDSPORTS and one each through East Lane Little League Baseball, East Lane Little League Softball and the American Legion. These tournaments average approximately 2.9 games per team, resulting in nearly 900 games played on Eugene-Springfield baseball/softball fields. These tournaments attract approximately 36,000 total attendees, of which, nearly 17,200 are non-local attendees.

Assuming the development of the proposed new Multi-use Sports Complex (as outlined earlier), it is estimated that net new inducement of new/expanded local and non-local sports league and tournament play will be generated in Eugene-Springfield. A portion of this new induced market will be accommodated at the new Multi-Use Complex, while others will be accommodated at other local facilities through the assumption of new periods of availability as some existing demand shifts to the new Facility. The estimated incremental induced market utilization for Eugene-Springfield triangle field primary users is presented in Exhibit 2.

## Exhibit 2 Estimated Induced Market Utilization – Baseball/Softball Fields

ESTIMATED INCREMENTAL INDUCED MARKET UTILIZATION Eugene/Springfield Triangle Field Primary Users													
	Number of Tournaments	Number of Teams	Average Participants Per Team	Total Players	Games Per Team	Total Player Attendance	Spectator Attd. Factor	Total Spectator Attendance	Total Attendance	Local %	Non-Local %	Total Local Attendance	Total Non-Local Attendance
Incremental Usage:													
Leagues:													
Willamette Valley Babe Ruth		28	13	374	20	7,480	2.0	14,960	22,440	60%	40%	13,558	8,883
Eugene Little League		4	14	55	13	715	2.0	1,430	2,145	100%	0%	2,145	0
East Lane Little League		0	13	0	10	0	2.0	0	0	100%	0%	0	0
American Legion		0	18	0	16	0	1.5	0	0	95%	5%	0	0
Eugene Little League Softball		6	12	90	18	1,620	2.0	3,240	4,860	100%	0%	4,860	0
East Lane Little League Softball		0	12	0	10	0	2.0	0	0	100%	0%	0	0
Eugene Lightning (ASA Softball)		5	14	70	0	0	2.0	0	0	100%	0%	0	0
KIDSPORTS		31	15	458	8	3,664	2.0	7,328	10,992	90%	10%	9,893	1,099
Willamalane Parks and Rec District		0	13	0	12	0	0.5	0	0	95%	5%	0	0
ASA Co-Ed & Women's Softball		0	14	0	0	0	1.5	0	0	0	0	0	0
City of Eugene Adult Leagues		61	12	732	8	5,856	0.5	2,928	8,784	90%	10%	7,906	878
Subtotal:		135	13	1,779	13	19,335	1.5	29,886	49,221	78%	22%	38,361	10,860
Tournaments:													
Willamette Valley Babe Ruth	2	179	13	2,327	3.7	8,592	2.0	17,184	25,776	20%	80%	5,155	20,621
Eugene Little League	1	48	13	624	3.8	2,340	2.0	4,680	7,020	20%	80%	1,404	5,616
East Lane Little League	0	0	13	0	1.8	0	2.0	0	0	100%	0%	0	0
American Legion	0	0	18	0	6.0	0	1.5	0	0	10%	90%	0	0
Eugene Little League Softball	1	48	12	576	3.8	2,160	2.0	4,320	6,480	20%	80%	1,296	5,184
East Lane Little League Softball	0	0	12	0	1.8	0	2.0	0	0	100%	0%	0	0
Eugene Lightning (ASA Softball)	2	168	14	2,352	3.7	8,684	2.0	17,369	26,053	15%	85%	3,908	22,145
KIDSPORTS	0	31	15	458	2.3	1,061	2.0	2,123	3,184	90%	10%	2,866	318
Willamalane Parks and Rec District	0	0	13	0	0.0	0	0.5	0	0	95%	5%	0	0
City of Eugene Adult Leagues	6	200	12	2,400	3.5	8,400	0.5	4,200	12,600	95%	5%	11,970	630
ASA Co-Ed & Women's Softball	0	0	14	0	0.0	0	1.5	0	0	0	0	0	0
Non-Local Tournament Organizers	16	464	12	5,568	3.8	20,880	2.0	41,760	62,640	15%	85%	9,396	53,244
Subtotal:	28	1,138	13	14,305	3.6	52,118	1.8	91,635	143,753	25%	75%	35,995	107,758
Total Incremental:	28	1,273	13	16,084		71,453		121,521	192,974	39%	61%	74,356	118,618
Total Existing + Induced (Leagues)		771	13	10,014	11	109,142	1.4	156,709	265,851	81%	19%	215,543	50,308
Total Existing + Induced (Tournaments)	41	1,476	13	18,994	3.5	67,000	1.8	119,516	186,516	33%	67%	61,559	124,957
TOTAL EXISTING + INDUCED ACTIVITY	41	2,247	13	29,008	6.1	176,142	1.6	276,225	452,367	61%	39%	277,102	175,265
Note: Total attendance only includes unique participants / spectators per event (e.g. multiple day spectators are only counted once).													

Note: Total attendance only includes unique participants / spectators per event (e.g., multiple day specators are only counted once).

Assuming a facility development program is pursued as outlined, and the facility is managed by professional, competent and experienced facility management personnel that will promote events in keeping with Eugene and Springfield's goals of community involvement and economic impact, local league participation (players/teams) is projected to grow by approximately 18 percent.

However, the largest area of potential growth is through the opportunity to host more, and larger tournaments. The added field inventory and critical mass of fields in one location would be expected to attract 28 new tournaments and more than 15,700 incremental players, of which, an estimated 71 percent would originate from outside of the Eugene-Springfield market. Overall, additional baseball/softball fields would be expected to attract nearly 202,700 incremental attendees, of which, nearly 119,600 (59 percent) would be non-local participants and attendees.

A similar exercise relating to estimated existing market utilization for Eugene-Springfield rectangle field (i.e., soccer, lacrosse, football, field hockey, etc.) primary users is presented in Exhibit 3.

### Exhibit 3 Estimated Existing Market Utilization – Rectangle/Multisport Fields

ESTIMATED EXISTING MARKET UTILIZATION Eugene/Springfield Rectangle Field Primary Users													
	Number of Tournaments	Number of Teams	Average Participants Per Team	Total Players	Games Per Team	Total Player Attendance	Spectator Attd. Factor	Total Spectator Attendance	Total Attendance	Local %	Non- Local %	Total Local Attendance	Total Non-Local Attendance
<b>Existing Usage:</b>													
<b>Leagues:</b>													
Eugene Timbers Futbol Club		60	13	800	8	6,400	2.0	12,800	19,200	90%	10%	17,280	1,920
Pelada Futbol Academy		45	13	585	8	4,680	2.0	9,360	14,040	70%	30%	9,828	4,212
Lane Youth Soccer Association		30	11	330	7	2,310	2.0	4,620	6,930	85%	15%	5,891	1,040
Maximus Sports (Flag Football)		36	11	396	16	6,336	2.0	12,672	19,008	85%	15%	16,157	2,851
Willamette Valley Youth Football & Cheer		51	25	1,250	8	10,000	2.0	20,000	30,000	60%	40%	18,000	12,000
Awestruck Lacrosse		4	30	120	0	0	2.0	0	0	85%	15%	0	0
Eugene Masters Lacrosse		1	26	26	7	182	0.5	91	273	95%	5%	259	14
Eugene Rugby Football Club		1	13	13	4	52	0.5	26	78	95%	5%	74	4
Eugene Reign Rugby Club		1	17	17	2	34	0.5	17	51	95%	5%	48	3
Eugene Ultimate Frisbee		40	13	500	12	6,000	0.5	3,000	9,000	100%	0%	9,000	0
Northwest Christian University		2	20	40	18	720	2.8	2,016	2,736	100%	0%	2,736	0
KIDSPORTS		623	11	7,003	7	50,381	2.0	100,762	151,143	90%	10%	136,029	15,114
City of Eugene Adult Leagues		175	11	1,957	8	15,656	0.5	7,828	23,484	100%	0%	23,484	0
<b>Subtotal:</b>		<b>1,069</b>	<b>12</b>	<b>13,037</b>	<b>8</b>	<b>102,751</b>	<b>1.7</b>	<b>173,192</b>	<b>275,943</b>	<b>87%</b>	<b>13%</b>	<b>238,786</b>	<b>37,157</b>
<b>Tournaments:</b>													
Eugene Timbers Futbol Club	1	100	5	500	3.3	1,625	2.0	3,250	4,875	20%	80%	975	3,900
Pelada Futbol Academy	0	0	13	0	0.0	0	2.0	0	0	20%	80%	0	0
Lane Youth Soccer Association	0	0	11	0	0.0	0	2.0	0	0	30%	70%	0	0
Maximus Sports (Flag Football)	1	24	15	360	3.8	1,368	2.0	2,736	4,104	90%	10%	3,694	410
Willamette Valley Youth Football & C	0	0	25	0	0.0	0	2.0	0	0	90%	10%	0	0
Awestruck Lacrosse	0	0	30	0	0.0	0	2.0	0	0	20%	80%	0	0
Eugene Masters Lacrosse	0	0	26	0	0.0	0	0.5	0	0	10%	90%	0	0
Eugene Rugby Football Club	0	0	13	0	0.0	0	0.5	0	0	10%	90%	0	0
Eugene Reign Rugby Club	0	0	17	0	0.0	0	0.5	0	0	10%	90%	0	0
Eugene Ultimate Frisbee	1	32	13	400	2.3	920	0.5	460	1,380	20%	80%	276	1,104
Northwest Christian University	0	0	20	0	0.0	0	2.8	0	0	10%	90%	0	0
KIDSPORTS	8	166	13	2,158	2.0	4,412	2.0	8,825	13,237	90%	10%	11,913	1,324
City of Eugene Adult Leagues	0	0	0	0	0.0	0	0.5	0	0	20%	80%	0	0
<b>Subtotal:</b>	<b>11</b>	<b>322</b>	<b>11</b>	<b>3,418</b>	<b>2.4</b>	<b>8,325</b>	<b>1.8</b>	<b>15,271</b>	<b>23,596</b>	<b>71%</b>	<b>29%</b>	<b>16,858</b>	<b>6,738</b>
<b>Total Existing:</b>	<b>11</b>	<b>1,391</b>	<b>12</b>	<b>16,455</b>		<b>111,077</b>	<b>1.7</b>	<b>188,463</b>	<b>299,540</b>	<b>85%</b>	<b>15%</b>	<b>255,644</b>	<b>43,895</b>

As presented, an estimated 1,070 teams and 13,000 players currently utilize multisport rectangle fields throughout Eugene and Springfield for various league play, consisting of over 8,400 soccer, football (flag and tackle), rugby, lacrosse and ultimate Frisbee games. An estimated 275,900 people participated and/or attended these games, with approximately 37,200 of these attendees coming from outside of the Eugene-Springfield market. Notably, KIDSPORTS generated the highest attendance figures of all rectangle field users, accounting for over 151,100 total attendees.

There are an estimated 11 annual rectangle-field tournaments throughout Eugene-Springfield; eight of these tournaments are Emerald KIDSPORTS tournaments, consisting of five pre-season Jamborees and three year-end tournaments. The remaining three tournaments are hosted by the Eugene Timbers (soccer), Maximus Sports (flag football) and Ultimate Frisbee. Approximately 85 percent of the teams and participants utilizing existing facilities for these tournaments reside in Eugene or Springfield.



The estimated incremental induced market utilization for Eugene-Springfield rectangle field primary users is presented in Exhibit 4.

#### Exhibit 4 Estimated Induced Market Utilization – Rectangle/Multisport Fields

ESTIMATED INCREMENTAL INDUCED MARKET UTILIZATION Eugene/Springfield Rectangle Field Primary Users													
	Number of Tournaments	Number of Teams	Average Participants Per Team	Total Players	Games Per Team	Total Player Attendance	Spectator Attd. Factor	Total Spectator Attendance	Total Attendance	Non- Local %	Local %	Total Local Attendance	Total Non-Local Attendance
<b>Incremental Usage:</b>													
<b>Leagues:</b>													
Eugene Timbers Futbol Club		6	13	80	8	640	2.0	1,280	1,920	90%	10%	1,728	192
Pelada Futbol Academy		5	13	60	8	480	2.0	960	1,440	70%	30%	1,008	432
Lane Youth Soccer Association		3	11	30	7	210	2.0	420	630	85%	15%	536	95
Maximus Sports (Flag Football)		0	11	0	16	0	2.0	0	0	85%	15%	0	0
Willamette Valley Youth Football & Cheer		0	25	0	8	0	2.0	0	0	60%	40%	0	0
Awestruck Lacrosse		0	30	0	0	0	2.0	0	0	85%	15%	0	0
Eugene Masters Lacrosse		0	26	0	7	0	0.5	0	0	95%	5%	0	0
Eugene Rugby Football Club		0	13	0	4	0	0.5	0	0	95%	5%	0	0
Eugene Reign Rugby Club		0	17	0	2	0	0.5	0	0	95%	5%	0	0
Eugene Ultimate Frisbee		0	13	0	12	0	0.5	0	0	100%	0%	0	0
Northwest Christian University		0	20	0	18	0	2.8	0	0	100%	0%	0	0
KIDSPORTS	125	11	1,400	7	10,072	2.0	20,144	30,216	30,216	90%	10%	27,194	3,022
City of Eugene Adult Leagues	35	11	390	8	3,120	0.5	1,560	4,680	4,680	95%	5%	4,446	234
<b>Subtotal:</b>		<b>174</b>	<b>11</b>	<b>1,960</b>	<b>7</b>	<b>14,522</b>	<b>1.7</b>	<b>24,364</b>	<b>38,886</b>	<b>90%</b>	<b>10%</b>	<b>34,912</b>	<b>3,974</b>
<b>Tournaments:</b>													
Eugene Timbers Futbol Club	3	150	13	1,950	3.3	6,338	2.0	12,675	19,013	20%	80%	3,803	15,210
Pelada Futbol Academy	2	60	13	780	3.3	2,535	2.0	5,070	7,605	20%	80%	1,521	6,084
Lane Youth Soccer Association	0	0	11	0	3.3	0	2.0	0	0	30%	70%	0	0
Maximus Sports (Flag Football)	0	0	11	0	0.0	0	2.0	0	0	90%	10%	0	0
Willamette Valley Youth Football & Cheer	0	0	25	0	0.0	0	2.0	0	0	90%	10%	0	0
Awestruck Lacrosse	1	8	30	240	4.0	960	2.0	1,920	2,880	20%	80%	576	2,304
Eugene Masters Lacrosse	0	0	26	0	0.0	0	0.5	0	0	10%	90%	0	0
Eugene Rugby Football Club	0	0	13	0	0.0	0	0.5	0	0	10%	90%	0	0
Eugene Reign Rugby Club	0	0	17	0	0.0	0	0.5	0	0	10%	90%	0	0
Eugene Ultimate Frisbee	1	64	13	800	2.3	1,840	0.5	920	2,760	20%	80%	552	2,208
Northwest Christian University	0	0	20	0	0.0	0	2.8	0	0	10%	90%	0	0
KIDSPORTS	0	125	11	1,405	2.0	2,873	2.0	5,746	8,619	90%	10%	7,757	862
City of Eugene Adult Leagues	0	0	11	0	2.0	0	2.0	0	0	20%	80%	0	0
Non-Local Tournament Organizers	10	180	13	2,340	3.3	7,722	2.0	15,444	23,166	20%	80%	4,633	18,533
<b>Subtotal:</b>	<b>17</b>	<b>587</b>	<b>13</b>	<b>7,515</b>	<b>3.0</b>	<b>22,267</b>	<b>1.9</b>	<b>41,775</b>	<b>64,042</b>	<b>29%</b>	<b>71%</b>	<b>18,842</b>	<b>45,201</b>
<b>Total Incremental:</b>	<b>17</b>	<b>761</b>	<b>12</b>	<b>9,475</b>		<b>36,789</b>	<b>1.8</b>	<b>66,139</b>	<b>102,928</b>	<b>13%</b>	<b>87%</b>	<b>274,486</b>	<b>89,096</b>
<b>Total Existing + Induced (Leagues)</b>		<b>1,243</b>	<b>12</b>	<b>14,997</b>	<b>8</b>	<b>117,273</b>	<b>1.7</b>	<b>197,556</b>	<b>314,829</b>	<b>87%</b>	<b>13%</b>	<b>273,698</b>	<b>41,131</b>
<b>Total Existing + Induced (Tournaments)</b>	<b>28</b>	<b>909</b>	<b>12</b>	<b>10,933</b>	<b>2.8</b>	<b>30,593</b>	<b>1.9</b>	<b>57,046</b>	<b>87,639</b>	<b>41%</b>	<b>59%</b>	<b>35,700</b>	<b>51,939</b>
<b>TOTAL EXISTING + INDUCED ACTIVITY</b>	<b>28</b>	<b>2,152</b>	<b>12</b>	<b>25,930</b>	<b>5.7</b>	<b>147,866</b>	<b>1.7</b>	<b>254,602</b>	<b>402,468</b>	<b>77%</b>	<b>23%</b>	<b>309,398</b>	<b>93,070</b>

Note: Total attendance only includes unique participants / spectators per event (e.g. multiple day spectators are only counted once).

Assuming the development of rectangle fields as outlined earlier in this chapter, it is estimated that latent demand for multisport rectangle fields would account for approximately 14 percent growth among existing teams, serving an additional 1,960 participants. This includes accommodating growth within Emerald KIDSPORTS of an estimated 1,400 participants in football, flag football, spring soccer, fall soccer and lacrosse leagues that currently cannot participate due to lack of adequate field access. Further opportunities may exist for increasing usage among niche and/or developing sports such as lacrosse, rugby, Australian rules football and Ultimate Frisbee.

Opportunities exists to develop new/larger tournaments within the market with a concentration of game-quality fields as outlined. It is estimated that these additional/larger tournaments would result in 17 new tournaments, attracting more than 66,900 attendees. Of these attendees, nearly 45,500 (or 68 percent) would be projected to come from outside of the Eugene-Springfield market.

**APPENDIX A:  
ADDITIONAL EUGENE-SPRINGFIELD AREA DEMOGRAPHIC DATA**

**Exhibit 1**  
**Key Demographic Metrics – Population and Household Summaries**

	30 minutes	90 minutes	180 minutes
<b>Population Summary</b>			
2000 Total Population	281,794	880,757	3,406,814
2010 Total Population	309,742	976,924	3,886,392
2015 Total Population	316,224	1,002,100	4,024,008
2015 Group Quarters	8,127	29,444	76,911
2020 Total Population	323,050	1,027,782	4,189,124
2015-2020 Annual Rate	0.43%	0.51%	0.81%
<b>Household Summary</b>			
2000 Households	113,377	337,570	1,320,804
2000 Average Household Size	2.42	2.53	2.53
2010 Households	127,391	381,193	1,527,818
2010 Average Household Size	2.37	2.49	2.49
2015 Households	131,332	392,738	1,588,529
2015 Average Household Size	2.35	2.48	2.48
2020 Households	134,670	403,939	1,657,650
2020 Average Household Size	2.34	2.47	2.48
2015-2020 Annual Rate	0.50%	0.56%	0.86%
2010 Families	74,747	242,525	977,941
2010 Average Family Size	2.90	3.01	3.03
2015 Families	76,068	247,042	1,006,703
2015 Average Family Size	2.88	3.00	3.02
2020 Families	77,410	252,443	1,044,390
2020 Average Family Size	2.88	3.00	3.02
2015-2020 Annual Rate	0.35%	0.43%	0.74%
<b>Median Household Income</b>			
2015	\$42,839	\$45,983	\$53,251
2020	\$49,731	\$53,205	\$61,500

Source: Esri, 2016

**Exhibit 2**  
**Key Demographic Metrics – Household Income and Housing Units by Value**

	30 minutes	90 minutes	180 minutes
<b>2015 Households by Income</b>			
Household Income Base	131,331	392,734	1,588,529
<\$15,000	17.0%	14.9%	12.6%
\$15,000 - \$24,999	12.0%	11.8%	10.3%
\$25,000 - \$34,999	11.7%	11.6%	10.5%
\$35,000 - \$49,999	15.5%	14.8%	13.4%
\$50,000 - \$74,999	16.6%	17.3%	17.7%
\$75,000 - \$99,999	12.1%	12.8%	13.6%
\$100,000 - \$149,999	10.2%	11.6%	13.6%
\$150,000 - \$199,999	2.7%	3.0%	4.5%
\$200,000+	2.3%	2.2%	3.8%
Average Household Income	\$59,011	\$61,339	\$71,181
<b>2015 Owner Occupied Housing Units by Value</b>			
Total	72,215	229,957	952,917
<\$50,000	6.3%	5.7%	3.8%
\$50,000 - \$99,999	2.2%	4.1%	3.2%
\$100,000 - \$149,999	6.8%	11.1%	7.3%
\$150,000 - \$199,999	20.1%	21.7%	14.8%
\$200,000 - \$249,999	21.1%	18.4%	17.3%
\$250,000 - \$299,999	15.0%	12.9%	14.8%
\$300,000 - \$399,999	15.5%	14.1%	18.0%
\$400,000 - \$499,999	6.3%	5.9%	9.1%
\$500,000 - \$749,999	4.9%	4.2%	7.8%
\$750,000 - \$999,999	0.9%	0.9%	1.9%
\$1,000,000 +	1.1%	1.1%	1.9%
Average Home Value	\$270,114	\$256,330	\$311,272

Source: Esri, 2016

**Exhibit 3**  
**Key Demographic Metrics – Population by Educational Attainment and Occupation**

	30 minutes	90 minutes	180 minutes
<b>2015 Population 25+ by Educational Attainment</b>			
Total	212,878	668,939	2,753,885
Less than 9th Grade	2.7%	4.6%	3.9%
9th - 12th Grade, No Diploma	5.6%	6.3%	5.8%
High School Graduate	19.2%	19.7%	19.1%
GED/Alternative Credential	4.9%	5.6%	4.7%
Some College, No Degree	29.0%	27.6%	26.3%
Associate Degree	8.4%	8.8%	8.7%
Bachelor's Degree	18.2%	16.8%	19.9%
Graduate/Professional Degree	12.1%	10.5%	11.7%
<b>2015 Employed Population 16+ by Occupation</b>			
Total	134,781	411,655	1,782,092
White Collar	59.6%	57.1%	60.4%
Management/Business/Financial	13.1%	13.0%	14.8%
Professional	21.3%	20.0%	21.1%
Sales	10.9%	9.6%	10.6%
Administrative Support	14.4%	14.5%	13.9%
Services	19.2%	19.0%	18.0%
Blue Collar	21.1%	23.9%	21.6%
Farming/Forestry/Fishing	1.2%	2.7%	1.4%
Construction/Extraction	3.8%	4.4%	4.2%
Installation/Maintenance/Repair	3.4%	3.4%	3.4%
Production	7.1%	6.9%	6.5%
Transportation/Material Moving	5.6%	6.4%	6.0%

Source: Esri, 2016

## Exhibit 4 Key Demographic Metrics – Corporate Base

Data for all businesses in area		30 minutes		90 minutes		180 minutes	
Total Businesses:		15,248		42,977		178,862	
Total Employees:		178,397		487,100		1,921,998	
Total Residential Population:		316,223		1,002,100		4,024,008	
Employee/Residential Population Ratio:		0.56:1		0.49:1		0.48:1	

by NAICS Codes	Businesses		Employees		Businesses		Employees		Businesses		Employees	
	Number	Percent	Number	Percent	Number	Percent	Number	Percent	Number	Percent	Number	Percent
Agriculture, Forestry, Fishing & Hunting	143	0.9%	1,356	0.8%	794	1.8%	11,056	2.3%	2,178	1.2%	24,119	1.3%
Mining	7	0.0%	28	0.0%	22	0.1%	112	0.0%	100	0.1%	586	0.0%
Utilities	27	0.2%	770	0.4%	81	0.2%	1,690	0.3%	328	0.2%	7,890	0.4%
Construction	1,379	9.0%	9,730	5.5%	4,079	9.5%	25,192	5.2%	17,733	9.9%	103,175	5.4%
Manufacturing	674	4.4%	11,728	6.6%	1,670	3.9%	34,055	7.0%	7,086	4.0%	167,333	8.7%
Wholesale Trade	677	4.4%	9,634	5.4%	1,639	3.8%	20,827	4.3%	7,156	4.0%	109,659	5.7%
Retail Trade	2,154	14.1%	25,765	14.4%	6,142	14.3%	72,721	14.9%	25,800	14.4%	287,978	15.0%
Motor Vehicle & Parts Dealers	255	1.7%	3,370	1.9%	701	1.6%	8,316	1.7%	2,864	1.6%	39,063	2.0%
Furniture & Home Furnishings Stores	125	0.8%	667	0.4%	325	0.8%	1,700	0.3%	1,505	0.8%	9,252	0.5%
Electronics & Appliance Stores	161	1.1%	1,053	0.6%	368	0.9%	7,704	1.6%	1,734	1.0%	22,651	1.2%
Bldg Material & Garden Equipment &	215	1.4%	3,702	2.1%	689	1.6%	9,483	1.9%	3,187	1.8%	35,911	1.9%
Food & Beverage Stores	280	1.8%	4,294	2.4%	838	1.9%	11,692	2.4%	3,203	1.8%	46,375	2.4%
Health & Personal Care Stores	172	1.1%	1,651	0.9%	449	1.0%	3,835	0.8%	1,734	1.0%	14,814	0.8%
Gasoline Stations	90	0.6%	553	0.3%	312	0.7%	1,823	0.4%	1,248	0.7%	7,346	0.4%
Clothing & Clothing Accessories Stores	166	1.1%	1,532	0.9%	537	1.2%	4,002	0.8%	2,460	1.4%	19,485	1.0%
Sport Goods, Hobby, Book, & Music Stores	197	1.3%	1,847	1.0%	522	1.2%	3,641	0.7%	2,156	1.2%	14,871	0.8%
General Merchandise Stores	74	0.5%	4,181	2.3%	219	0.5%	12,597	2.6%	853	0.5%	49,053	2.6%
Miscellaneous Store Retailers	364	2.4%	2,525	1.4%	1,062	2.5%	7,227	1.5%	4,289	2.4%	25,549	1.3%
Nonstore Retailers	52	0.3%	391	0.2%	120	0.3%	701	0.1%	567	0.3%	3,608	0.2%
Transportation & Warehousing	329	2.2%	3,622	2.0%	996	2.3%	10,669	2.2%	4,072	2.3%	56,530	2.9%
Information	306	2.0%	4,492	2.5%	838	1.9%	10,076	2.1%	3,382	1.9%	42,503	2.2%
Finance & Insurance	1,140	7.5%	5,407	3.0%	3,187	7.4%	13,747	2.8%	12,592	7.0%	65,022	3.4%
Central Bank/Credit Intermediation & Related	679	4.5%	2,943	1.6%	1,988	4.6%	6,425	1.3%	7,569	4.2%	26,258	1.4%
Securities, Commodity Contracts & Other	160	1.0%	685	0.4%	405	0.9%	1,651	0.3%	1,830	1.0%	10,480	0.5%
Insurance Carriers & Related Activities;	301	2.0%	1,778	1.0%	794	1.8%	5,671	1.2%	3,193	1.8%	28,284	1.5%
Real Estate, Rental & Leasing	891	5.8%	4,774	2.7%	2,359	5.5%	10,309	2.1%	9,743	5.4%	52,481	2.7%
Professional, Scientific & Tech Services	1,193	7.8%	7,256	4.1%	3,142	7.3%	18,685	3.8%	14,989	8.4%	102,704	5.3%
Legal Services	204	1.3%	1,377	0.8%	606	1.4%	3,498	0.7%	2,694	1.5%	17,844	0.9%
Management of Companies & Enterprises	10	0.1%	124	0.1%	27	0.1%	322	0.1%	104	0.1%	753	0.0%
Administrative & Support & Waste	647	4.2%	8,735	4.9%	1,748	4.1%	17,628	3.6%	7,554	4.2%	59,412	3.1%
Educational Services	357	2.3%	12,782	7.2%	1,050	2.4%	44,228	9.1%	4,028	2.3%	134,300	7.0%
Health Care & Social Assistance	1,335	8.8%	35,280	19.8%	3,445	8.0%	83,666	17.2%	13,829	7.7%	273,540	14.2%
Arts, Entertainment & Recreation	287	1.9%	3,464	1.9%	774	1.8%	8,152	1.7%	3,238	1.8%	41,030	2.1%
Accommodation & Food Services	1,053	6.9%	14,390	8.1%	2,904	6.8%	35,493	7.3%	12,701	7.1%	171,178	8.9%
Accommodation	107	0.7%	2,044	1.1%	351	0.8%	4,023	0.8%	1,612	0.9%	29,452	1.5%
Food Services & Drinking Places	946	6.2%	12,346	6.9%	2,553	5.9%	31,470	6.5%	11,089	6.2%	141,726	7.4%
Other Services (except Public Administration)	1,780	11.7%	9,723	5.5%	5,139	12.0%	25,814	5.3%	20,305	11.4%	98,999	5.2%
Automotive Repair & Maintenance	385	2.5%	2,382	1.3%	1,020	2.4%	4,984	1.0%	4,084	2.3%	18,860	1.0%
Public Administration	398	2.6%	8,238	4.6%	1,581	3.7%	39,325	8.1%	5,005	2.8%	108,676	5.7%
Unclassified Establishments	462	3.0%	1,100	0.6%	1,360	3.2%	3,333	0.7%	6,939	3.9%	14,130	0.7%
Total	15,248	100.0%	178,397	100.0%	42,977	100.0%	487,100	100.0%	178,862	100.0%	1,921,998	100.0%

Source: Esri, 2016





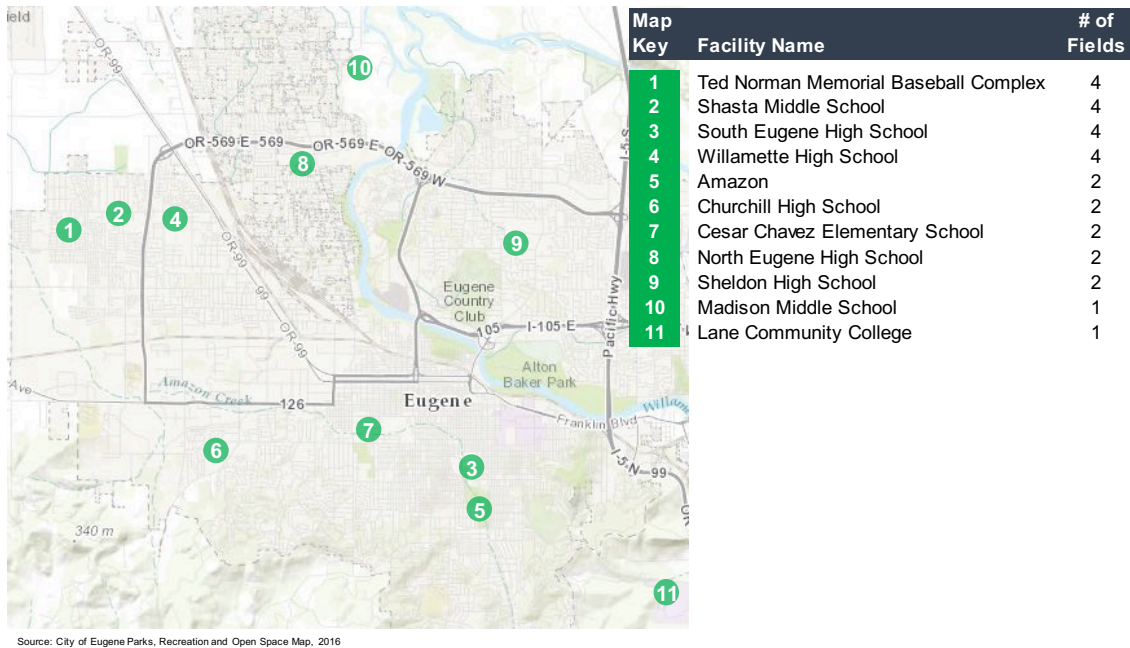
**Exhibit 5**  
**Key Demographic Metrics – Largest Area Employers**

<b>Employers</b>	<b>Industry</b>	<b>Employees</b>
PeaceHealth Corp	Healthcare	5,500
University of Oregon	Higher Education	5,406
Oregon State University	Higher Education	5,026
Hewlett-Packard	High Technology	1,700
Lane Community College	Higher Education	1,009
Symantec	High Technology	900
Royal Caribbean	Leisure Travel	900
McKenzie-Willamette Medical Center	Healthcare	895
PacificSource Health Plans	Insurance	600
CH2MHILL	Engineering	400
Datalogic	High Technology	270
Thermo Fisher Scientific/Life Technologies	Bio-Technology	250
Weyerhaeuser	Forest Products	200
Wildish Construction	Construction	200
GloryBee Natural Foods	Natural Foods	200
Turtle Mountain	Natural Foods	200
Bulk Handling Systems	Manufacturing	150
A and K Development Company	Manufacturing	50

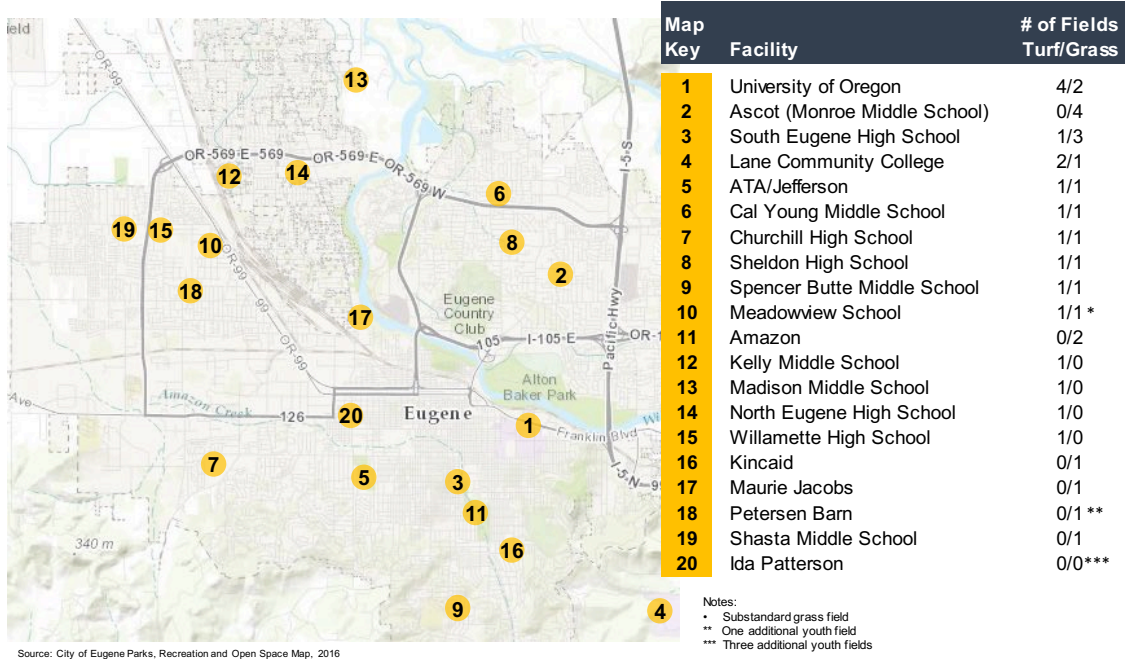
Source: Eugene Area Chamber of Commerce, 2016

## **APPENDIX B: EUGENE-SPRINGFIELD AMATEUR SPORTS FACILITY MAPS**

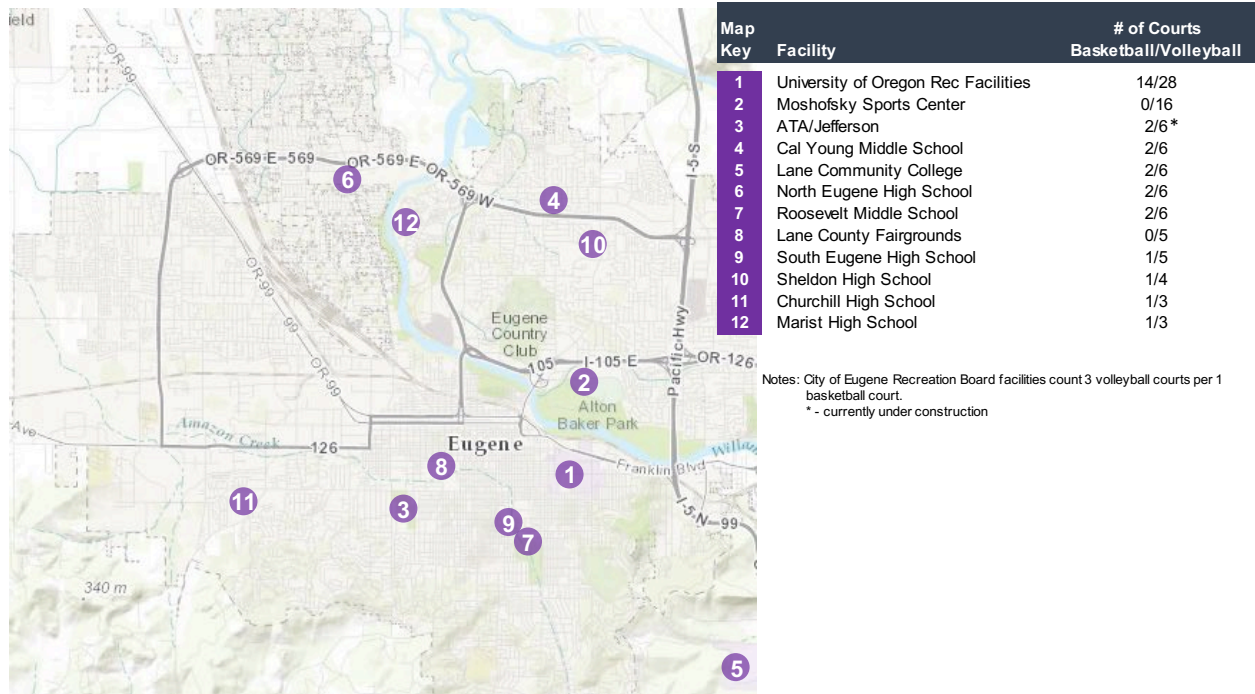
## Exhibit 1 Eugene Facilities – Triangle



## Exhibit 2 Eugene Facilities – Rectangle

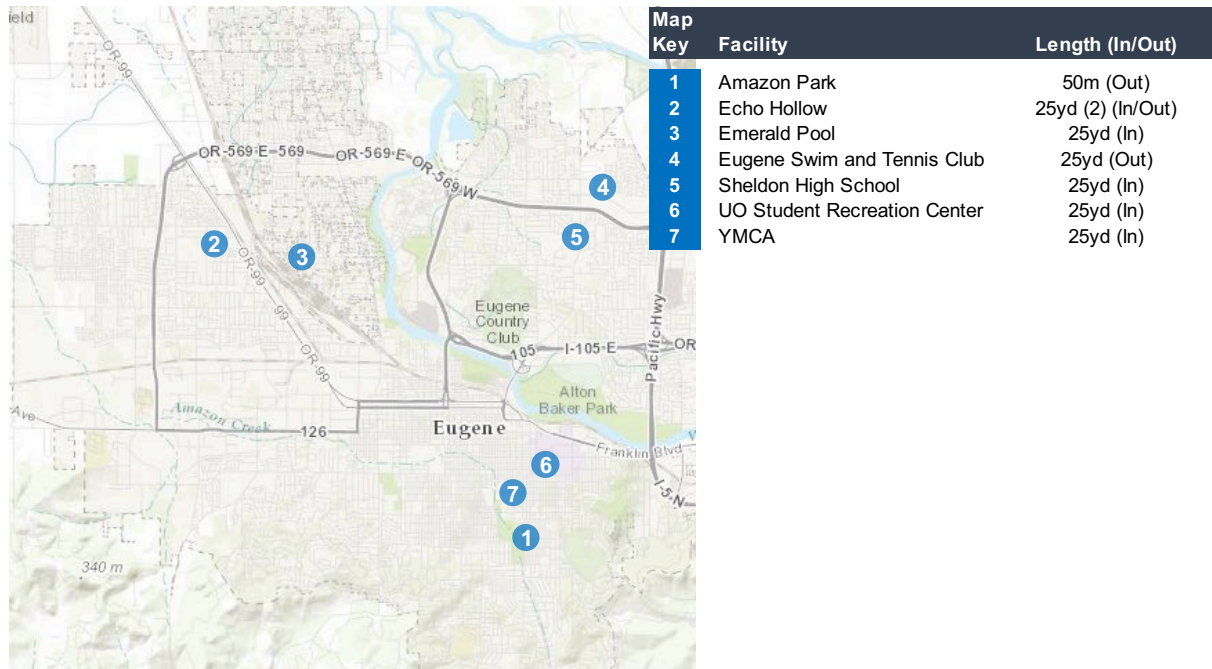


### Exhibit 3 Eugene Facilities – Indoor Courts



Source: City of Eugene Parks, Recreation and Open Space Map, 2016

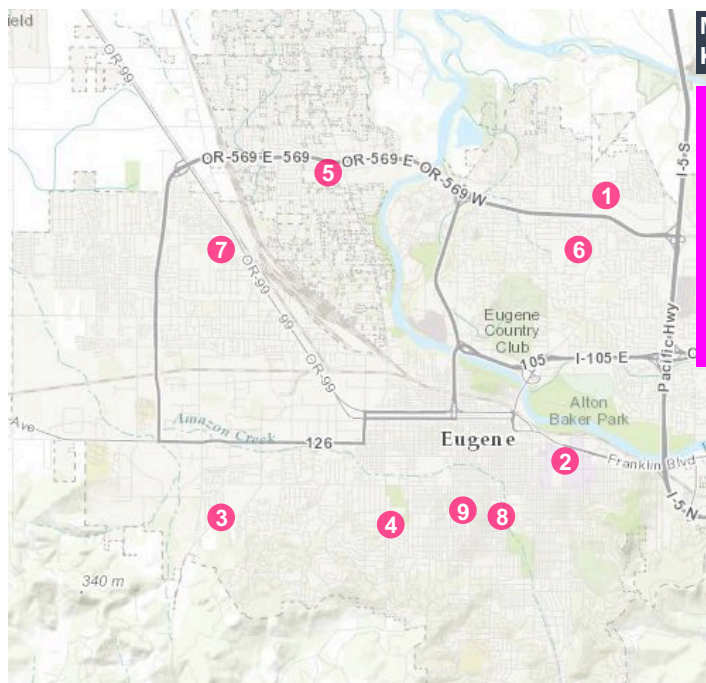
### Exhibit 4 Eugene Facilities – Aquatic Centers/Pools



Source: City of Eugene Parks, Recreation and Open Space Map, 2016



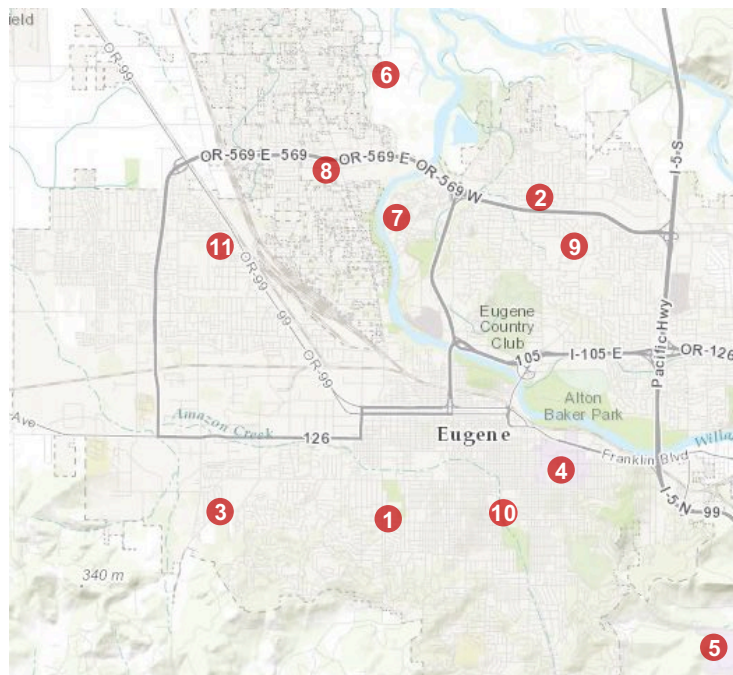
### Exhibit 5 Eugene Facilities – Tennis Courts



Source: City of Eugene Parks, Recreation and Open Space Map, 2016

Map Key	Facility	# of Courts
1	Eugene Swim and Tennis Club	17
2	University of Oregon	12
3	Churchill High School	4
4	Westmoreland	4
5	North Eugene High School	4
6	Sheldon High School	4
7	Echo Hollow	4
8	South Eugene High School	4
9	Washington Park	2

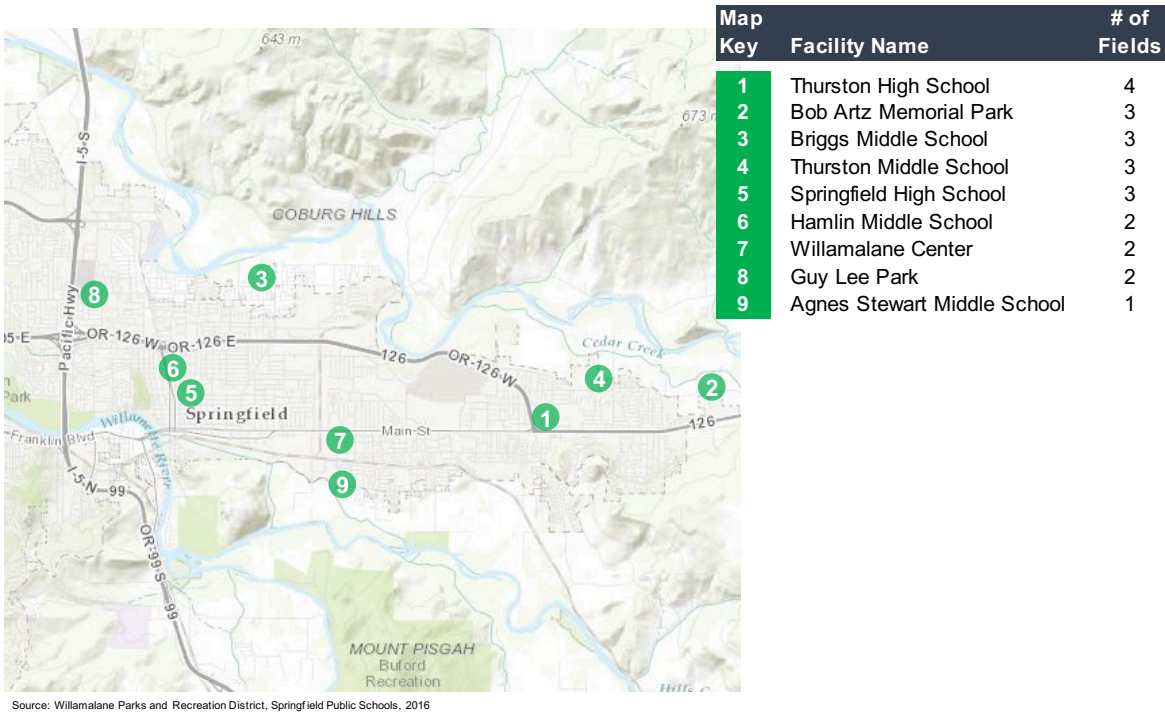
### Exhibit 6 Eugene Facilities – Tracks



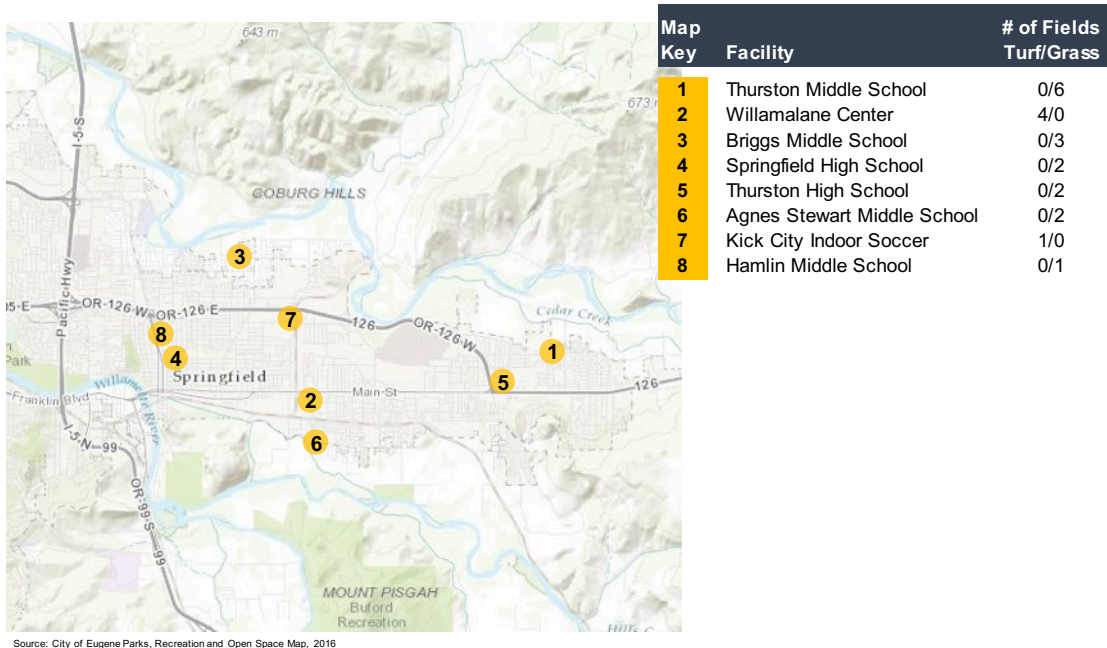
Source: City of Eugene Parks, Recreation and Open Space Map, 2016

Map Key	Facility
1	ATA/Jefferson
2	Cal Young Middle School
3	Churchill High School
4	Hayward Field
5	Lane Community College
6	Madison Middle School
7	Marist High School
8	North Eugene High School
9	Sheldon High School
10	South Eugene High School
11	Willamette High School

### Exhibit 7 Springfield Facilities – Triangle

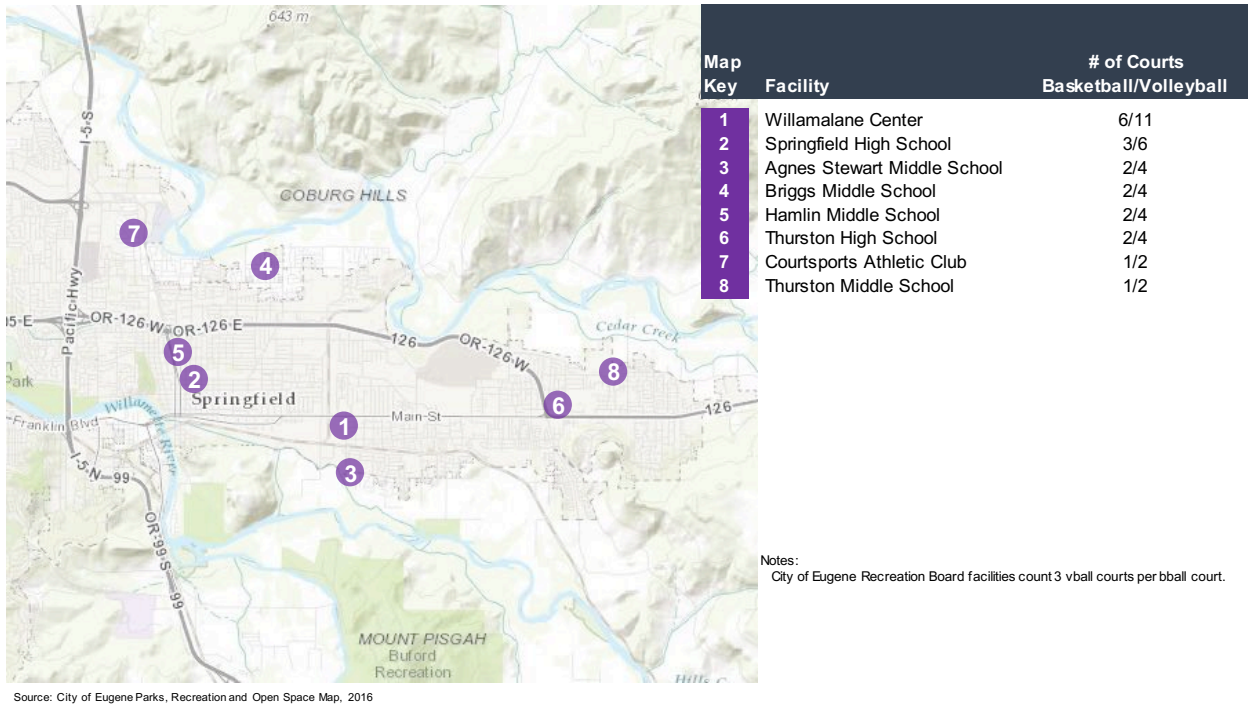


### Exhibit 8 Springfield Facilities – Rectangle

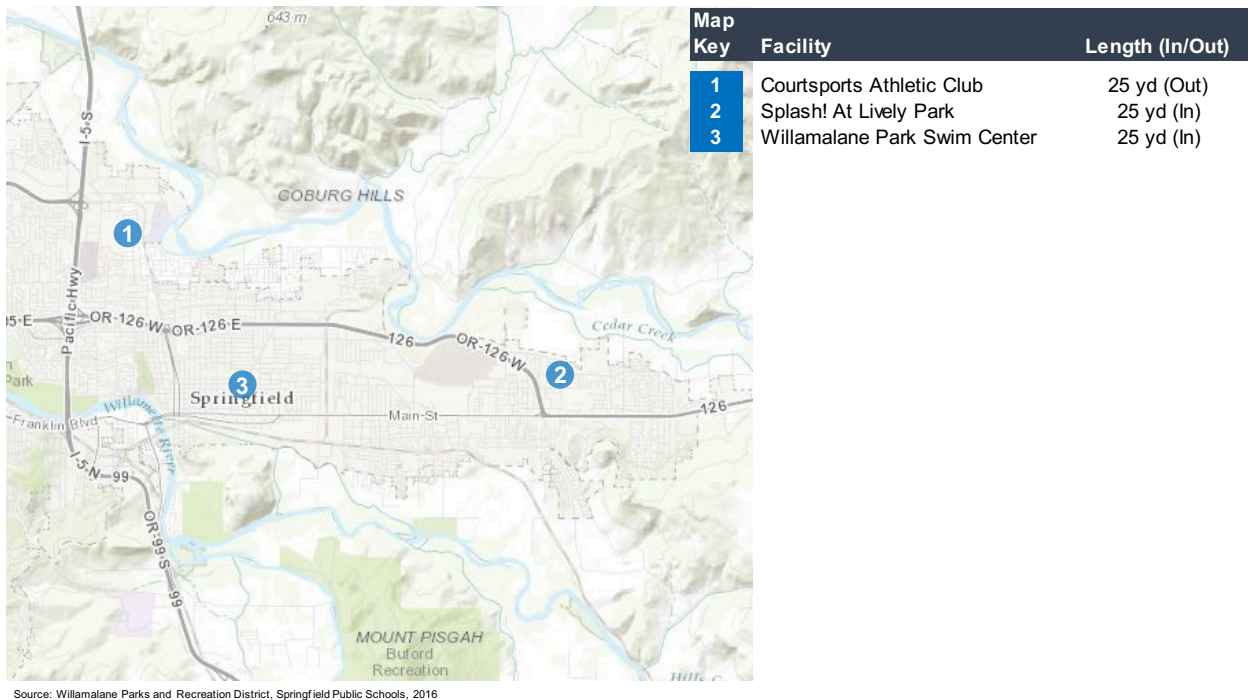




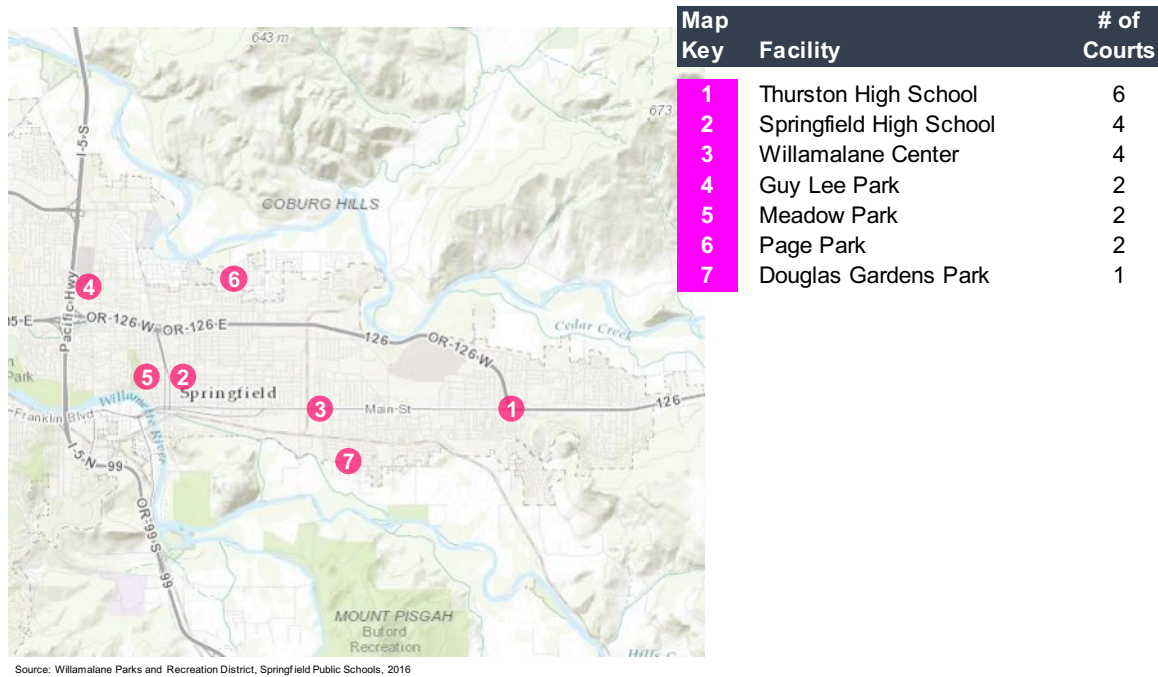
## Exhibit 9 Springfield Facilities – Indoor Courts



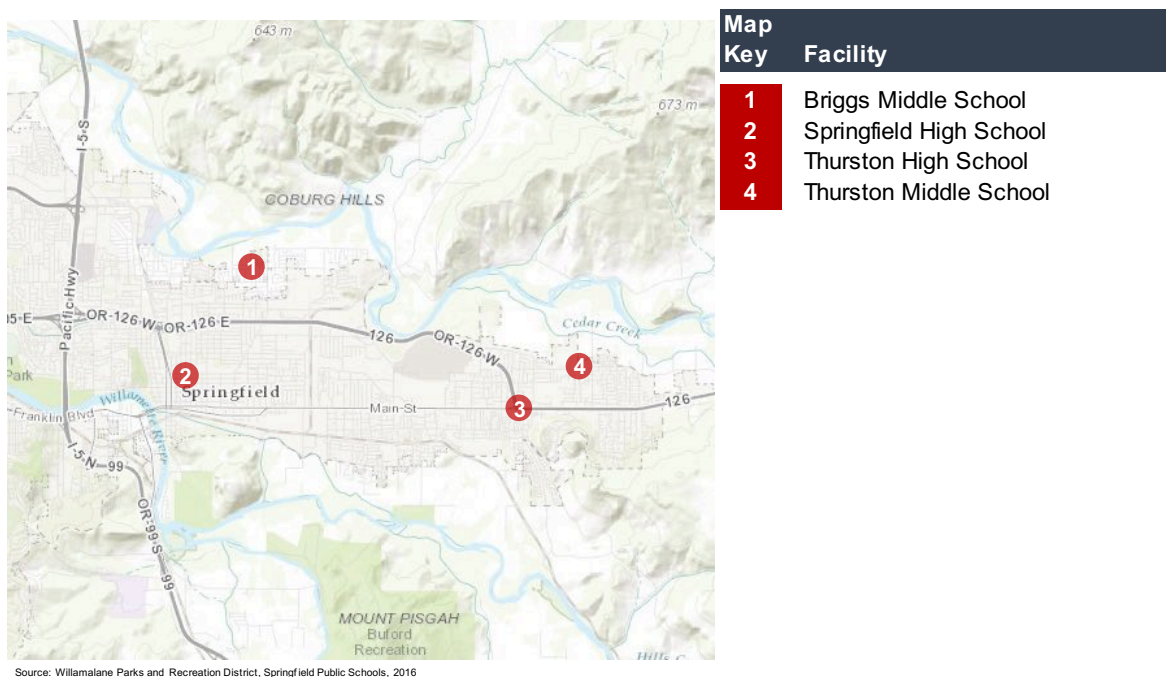
## Exhibit 10 Springfield Facilities – Aquatic Centers/Pools



### Exhibit 11 Springfield Facilities – Tennis Courts



### Exhibit 12 Springfield Facilities – Tracks



### Exhibit 13 Eugene Sports Facilities

Facility	Location	Basketball	Volleyball	Rectangle	Triangle	Tennis	Aquatic	Track
Amazon	Eugene	-	-	2	2	-	50m	-
Ascot (Monroe Middle School)	Eugene	-	-	4	-	-	-	-
ATA/Jefferson	Eugene	2	6	2	-	-	-	Yes
Cal Young Middle School	Eugene	2	6	2	-	-	-	Yes
Cesar Chavez Elementary School	Eugene	-	-	-	2	-	-	-
Churchill High School	Eugene	1	3	2	2	4	-	Yes
Echo Hollow Park	Eugene	-	-	-	4	-	25yd(2)	-
Emerald Pool	Eugene	-	-	-	-	-	25yd	-
Eugene Swim and Tennis Club	Eugene	-	-	-	-	17	25yd	-
Ida Patterson*	Eugene	-	-	-	-	-	-	-
Kelly Middle School	Eugene	-	-	1	-	-	-	-
Kincaid Park	Eugene	-	-	1	-	-	-	-
Lane Community College	Eugene	2	6	3	1	-	-	Yes
Lane County Fairgrounds	Eugene	-	5	-	-	-	-	-
Madison Middle School	Eugene	-	-	1	1	-	-	Yes
Marist High School	Eugene	1	3	-	-	-	-	Yes
Maurie Jacobs	Eugene	-	-	1	-	-	-	-
Meadowview Middle School	Eugene	-	-	2	-	-	-	-
Moshofsky Sports Center	Eugene	-	16	-	-	-	-	-
North Eugene High School	Eugene	2	6	1	2	4	-	Yes
Petersen Barn	Eugene	-	-	1	-	-	-	-
Roosevelt Middle School	Eugene	2	6	-	-	-	-	-
Shasta Middle School	Eugene	-	-	1	4	-	-	-
Sheldon High School	Eugene	1	4	2	2	4	25yd	Yes
South Eugene High School	Eugene	1	5	4	4	4	-	Yes
Spencer Butte Middle School	Eugene	-	-	2	-	-	-	-
Ted Norman Memorial Baseball Complex	Eugene	-	-	-	4	-	-	-
University of Oregon Rec Facilities**	Eugene	14	28	6	-	12	25yd	Yes
Washington Park	Eugene	-	-	-	-	2	-	-
Westmoreland	Eugene	-	-	-	-	4	-	-
Willamette High School	Eugene	-	-	1	4	-	-	Yes
YMCA	Eugene	-	-	-	-	-	25yd	-

**Exhibit 14**  
**Springfield Sports Facilities**

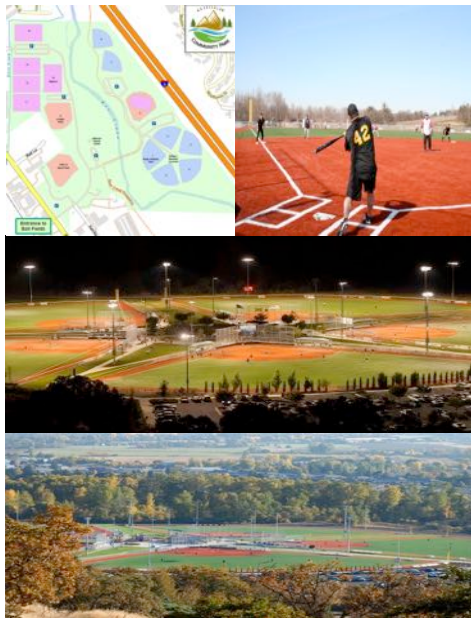
Facility	Location	Basketball	Volleyball	Rectangle	Triangle	Tennis	Aquatic	Track
Agnes Stewart Middle School	Springfield	2	4	2	1	-	-	-
Bob Artz Memorial Park	Springfield	-	-	-	3	-	-	-
Briggs Middle School	Springfield	2	4	3	3	-	-	Yes
Courtsports Athletic Club	Springfield	1	2	-	-	-	25 yd	-
Douglas Gardens Park	Springfield	-	-	-	-	1	-	-
Guy Lee Park	Springfield	-	-	-	2	2	-	-
Hamlin Middle School	Springfield	2	4	1	2	-	-	-
Kick City Indoor Soccer	Springfield	-	-	1	-	-	-	-
Meadow Park	Springfield	-	-	-	-	2	-	-
Page Park	Springfield	-	-	-	-	2	-	-
Splash! at Lively Park	Springfield	-	-	-	-	-	25yd	-
Springfield High School	Springfield	3	6	2	3	4	-	Yes
Thurston High School	Springfield	2	4	3	4	6	-	Yes
Thurston Middle School	Springfield	1	2	6	3	-	-	Yes
Willamalane Center for Sports and Recreation	Springfield	6	11	4	2	4	-	-
Willamalane Park Swim Center	Springfield	-	-	-	-	-	25yd	-

## **APPENDIX C: COMPETITIVE FACILITY CASE STUDIES**





<b>FACILITY:</b>	CAPITAL FC SOCCER COMPLEX
<b>City, State:</b>	Salem, Oregon
<b>Drive Distance from Eugene:</b>	1 hr and 5 min
<b>Owner:</b>	Capital Futbol Club
<b>Operator:</b>	Capital Futbol Club
<b>Facility Specs:</b>	10 natural grass soccer fields 6 full-sized fields 3 U-8 to U-9 fields 1 U-10 to U-11 field
<b>Development:</b>	Privately funded Considering adding at least one turf field Annual expenses for maintenance approximate \$50,000 Club makes \$700,000 in annual revenue \$500,000 comes from membership fees Receives donations
<b>Rental Rates:</b>	Club makes around \$30,000 in revenue per year for outside rentals
<b>Tenants:</b>	Capital Futbol Club
<b>Annual Events</b>	Capital Cup 200,000 unique visitors per year Approximately 15,000 athletes use the fields per week



<b>FACILITY:</b>	U.S. CELLULAR COMMUNITY PARK
<b>City, State:</b>	Medford, Oregon
<b>Drive Distance from Eugene:</b>	2 hr 40 min
<b>Owner:</b>	City of Medford
<b>Operator:</b>	Medford Parks and Recreation Department
<b>Key Facility Components:</b>	3 full-sized baseball fields 7 baseball/softball fields 6 multipurpose fields, including a 1,300-seat stadium field All fields are lighted with FieldTurf synthetic grass
<b>Development:</b>	\$32.5 million, 132-acre park. Phase II opened in 2008 with 5 softball/baseball fields. Phase III opened in 2009 with 6 multi-purpose fields. Phase IV opened in 2015 with 3 additional ballfields  Funding has come through a combination of issuing bonds, and transient lodging tax, car rental tax, and park utility fee proceeds. U.S. Cellular paid \$650,000 for 6 years of naming rights in 2005.  USCCP is the largest municipal installation of FieldTurf in the United States with nearly 1.5 million square feet of synthetic grass.
<b>Tenants:</b>	American Legion Medford Mustangs Medford Rogues
<b>Rental Rates:</b>	Softball/Baseball: \$20-\$25/game Multi-purpose: \$30-\$40/hour
<b>Annual Events:</b>	2014 saw \$10.2 million in economic stimulus from tournaments and other special events with 1,415 teams competing in more than 4,400 games (44 tournaments). An estimated 194,000 people visited the park in 2014.





**FACILITY:** WALLACE MARINE PARK SOFTBALL COMPLEX

**City, State:** Salem, Oregon

**Drive Distance from Eugene:** 1 hr 15 min

**Owner:** City of Salem

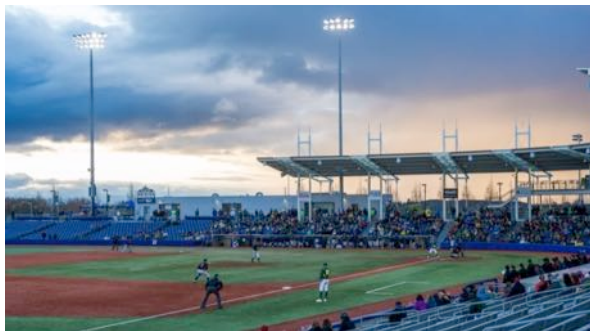
**Operator:** City of Salem

**Facility Specs:** 5 lighted softball fields  
2 lighted soccer fields  
Seating for more than 1,000 people

**Development:** First star complex opened to the public, in June 1986.

**Rental Rates:** Ranges from \$25-\$55/game slot, plus a \$20 application fee and a \$100 tournament fee

**Annual Events** Around 18 large softball tournaments annually, including:  
ASA Men's Open West Fast Pitch National Tournament  
USSSA Northwest National Championships  
Men's Slow Pitch National Tournament



**FACILITY:** GORDON FABER RECREATION COMPLEX

**City, State:** Hillsboro, Oregon

**Drive Distance from Eugene** 2 hr 10 min

**Owner:** City of Hillsboro

**Operator:** Hillsboro Parks and Recreation

**Facility Specs:** 6 natural grass softball fields  
Ron Tonkin Field (baseball)  
4,500 seats  
Can be striped for soccer and lacrosse  
Hillsboro Stadium  
7,000 seats  
Can fit 2 full-sized turf fields (can be rented out)

**Development:** Multiple phases of development:  
Hillsboro Stadium (opened in 1999) - \$10 million development used funding from the city and an Urban Renewal District  
Tonkin Field (opened in 2013) \$15.5 million development

**Operations:** Complex generated \$755,000 in revenue in FY 2015  
Approximately \$871,000 in direct expenditures in FY 2015

**Tenants:** Hillsboro Hops  
Century High School  
Portland Stags

**Annual Events** Triple Crown Baseball Tournament  
372 events in FY 2015

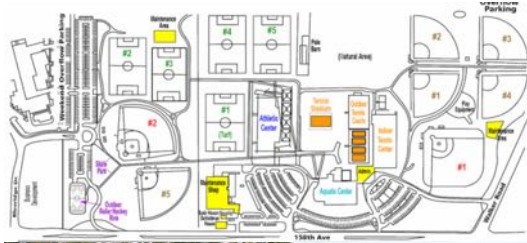


<b>FACILITY:</b>	60 ACRES SOCCER COMPLEX
<b>City, State:</b>	Redmond, Washington
<b>Drive Distance from Eugene</b>	5 hr 30 min
<b>Owner:</b>	King County
<b>Operator:</b>	Lake Washington Youth Soccer Association
<b>Facility Specs:</b>	25 natural grass soccer fields 6 full-sized fields 14 U-12 fields 5 U-9 fields
<b>Development:</b>	30-year use agreement between LWYSA and King County LWYSA responsible for all development and maintenance Planning replacement of 1 to 6 grass fields with turf
<b>Rental Rates:</b>	<u>June through November:</u> Single field under 50 people - \$50 per hour Multiple fields up to 500 people - \$500 per hour <u>December through May:</u> Single field Under 50 people - \$50 Multiple fields up to 500 people - \$500
<b>Tenants:</b>	Lake Washington Youth Soccer Association
<b>Annual Events</b>	Select Cup US Club Regional Tournament ECNL National Playoffs Nike Crossfire Challenge



<b>FACILITY:</b>	SIMPLOT SPORTS COMPLEX
<b>City, State:</b>	Boise, Idaho
<b>Distance from Eugene:</b>	7 hr 40 min
<b>Owner:</b>	City of Boise
<b>Operator:</b>	City of Boise
<b>Facility Specs:</b>	20 natural grass soccer fields 2 full-sized baseball fields 11 youth-sized baseball fields 2 youth softball fields
<b>Development:</b>	Opened in 1995 Soccer tenants pay for capital projects and expansions City shares maintenance costs with baseball tenants Tenant pays for infields and bases
<b>Rental Rates:</b>	Free when authorized by tenants
<b>Tenants:</b>	Idaho Youth Soccer Association Rush Soccer Club East Boise Youth Baseball and Softball
<b>Annual Events:</b>	Far West Regional Soccer Tournament 90 soccer games per year on each soccer field





**FACILITY:** HOWARD M. TERPENNING RECREATION COMPLEX

**City, State:** Beaverton, Oregon

**Distance From Eugene:** 2 hr 10 min

**Owner:**

Tualatin Hills Parks and Recreation Department

**Operator:**

Tualatin Hills Parks and Recreation Department

**Key Indoor Facility:** Tennis Center with 4 indoor courts

**Facility Components:** 10-lane, 50-meter pool with platform diving towers:

- (2) 1-meter springboards
- (2) 3-meter springboards

**Key Outdoor Facility:** 3 grass soccer fields

2 synthetic turf soccer fields

**Components:** 7 lighted softball/baseball fields

6 lighted outdoor tennis courts

Skate park, roller hockey rink

**Tenants:** Aquatics:

- Tualatin Hills Swim Club
- Tualatin Hills Dive Club
- Tualatin Hills Synchronized Swimming
- Tualatin Hills Barracudas
- Tualatin Hills Water Polo Club

**Rental Rates:** Aquatics: up to 25 guests: \$129/hour

26-50 guests: \$149/hour

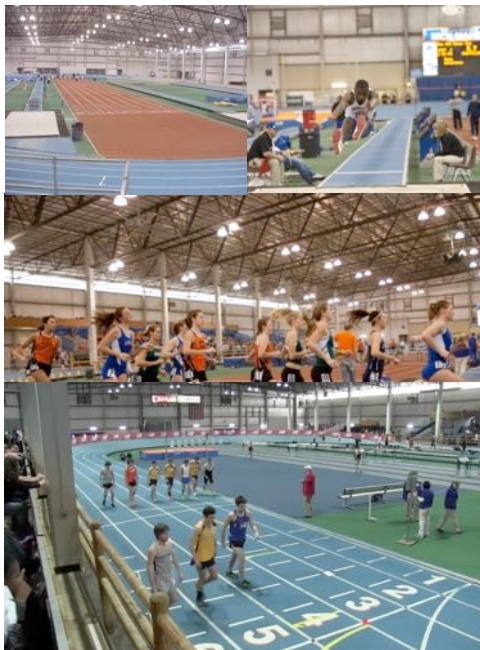
51-75 guests: \$169/hour

76 or more guests: \$189/hour

**Annual Events:** Revenues: \$470,000

Expenses: \$1.25 million

Operating Deficit: \$783,000



**FACILITY:** JACKSONS INDOOR TRACK

**City, State:** Nampa, Idaho

**Distance From Eugene:** 7 hr 20 min

**Owner:**

City of Nampa/Boise State University

**Operator:**

Spectra

**Key Facility Components:** 6-lane 200-meter banked indoor track

Features Mondo surface, which is required by NCAA and USTAF events

8-lane 60-meter straightaway in center of track

Pole vault, long jump and triple jump stations in center of track

4,000 seats

100,000 square feet of total space

Part of Idaho Center complex

**Development:** Opened in 2002 at a total cost of \$10.0 million and was a partnered effort between Boise State University, Jacksons Food Stores and the City of Nampa

\$2.5 million in public funds were provided

Private sector contributed \$7.5 million

It is currently the only 200-meter championship-capable indoor track in the Pacific Northwest

**Tenants:** Boise State Track and Field

**Rental Rates:** \$17,000 to \$25,000 for weekend rentals

Boise State responsible for renting facility to local groups, while Spectra rents out facility to other collegiate, regional and national users

Spectra and Boise State split annual profits (or losses)

Facility charges \$5.00 admission fee per spectator

**Annual Events:** USATF Masters Championship

NCAA Division 1 Track Mountain Pacific Sports Federation Indoor Championships

Western Athletic Conference Indoor Championships

Approximately 40,000 attendees per year

Hosts six indoor meets per year during indoor track season

Hosts approximately 32 sports/non-sports events per year

## **APPENDIX D: COMPARABLE FACILITY SELECTED CASE STUDIES**

**FACILITY:** U.S. CELLULAR COMMUNITY PARK

**City, State:** Medford, Oregon

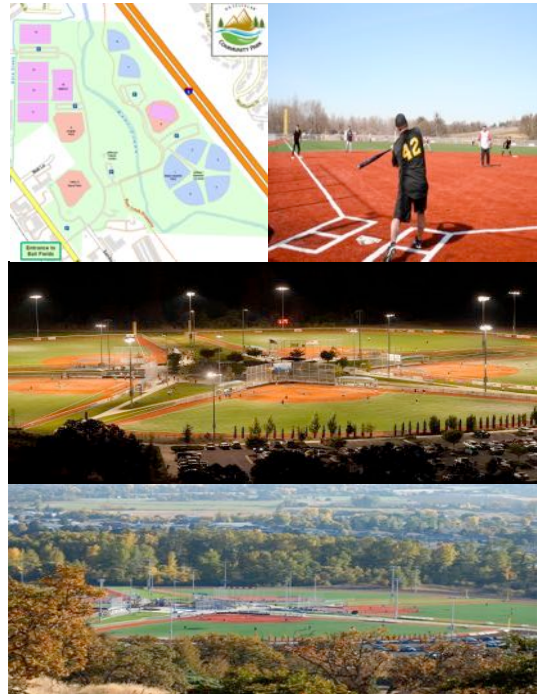
**Owner:** City of Medford

**Operator:** Medford Parks and Recreation Department

**Cost:** \$32 million

**Key Facility** 3 full-sized baseball fields

**Components:** 7 baseball/softball fields  
6 multipurpose fields, including a 1,300-seat stadium field  
All fields are lighted with FieldTurf synthetic grass



The 132-acre, city-owned U.S. Cellular Community Park in Medford, Oregon has undergone multiple phases of expansion and now features ten total diamond fields, three of which are for adult baseball users, and six multipurpose fields that includes one championship field with 1,300 fixed seats. Harry and David Field is also included in the complex, and has over 2,100 fixed seats.

Each of the fields are fully lighted and feature FieldTurf, making the campus one of the largest municipal installations of FieldTurf in the United States with nearly 1.4 million square feet of synthetic grass. The complex is maintained and operated by the Medford Parks and Recreation Department, and is situated in southern Medford along U.S. Highway 99 and Interstate 5.

Phase II of USCCP opened in 2008 and added five of the previously listed softball/baseball fields to the complex, followed by Phase III in 2009, which included the six multipurpose fields, and phase IV opened in 2015, which included three additional baseball fields. Funding for these developments has come from a combination of issuing bonds, and transient lodging tax, car rental tax, and park utility fee proceeds. In addition, U.S. Cellular paid \$650,000 for 6 years of naming rights. Local officials indicated that future amenities at the Park may include high quality sand volleyball courts, a multipurpose indoor facility, and various infrastructural and campus/destination improvements, such as a new covered picnic area.

Tenants of USCCP include the Medford Rogues, a collegiate wood bat baseball team, and the American Legion Medford Mustangs, an adult baseball team. The Park also serves as the home field for Cascade Christian High and St. Mary's School, as well as for the Rogue Valley timbers, an amateur soccer club. For outside users, it costs between \$20 and \$25 per game to rent the triangle fields, and \$30 to \$40 per hour to rent to the multipurpose fields.

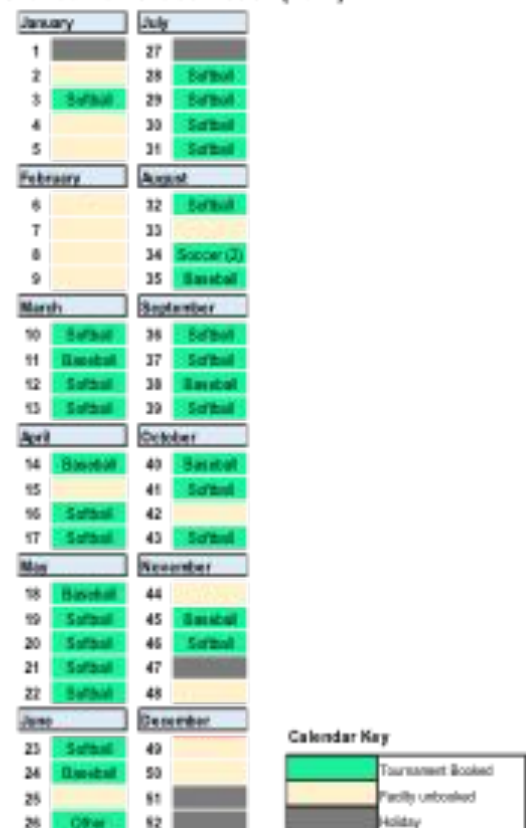
In 2014, the Park hosted 44 tournaments and other special events, with 1,415 teams (nearly 750 of which were non-local) competing in more than 4,400 total games. In total, an estimated 194,000 people visited the park. A detailed breakdown of the facility's utilization-by-weekend is presented below. As shown, the facility hosted a tournament on 32 of the 47 non-holiday weekends in 2014, resulting in a 68 percent "weekend occupancy". Fastpitch and adult softball groups were the most frequent organizers of these tournaments. Though there were few soccer tournaments during the year, the facility was frequented by a total of nearly 270 local and regional soccer teams for league play. Among each of the user groups, local officials noted that they saw the largest jump in the number of youth baseball teams that frequented the complex, with 33.5 percent more teams participating in league play and tournaments in 2014 than 2013.

According to Medford Parks and Recreation Department officials, the Park runs approximately \$300,000 in operating revenues per year and \$600,000 in annual operating expenses, resulting in an average operating loss of \$300,000 per year.

The USCCP is also home to the Coyote Trails Jefferson Nature Center, an educational nature center that hosts field trips and the general public and teaches them about environmental sciences.

	Local Teams	Non-Local Teams
Adult Softball	153	146
Baseball	42	4
Fastpitch	67	175
Football	12	7
Soccer	266	217
Youth Baseball	89	115
Special Olympics	38	84
<b>Total</b>	<b>667</b>	<b>748</b>

Weekend Tournament Utilization (2014)





<b>FACILITY:</b>	<b>GRAND PARK</b>
<b>City, State:</b>	Westfield, Indiana
<b>Year Opened:</b>	2014
<b>Owner:</b>	City of Westfield
<b>Operator:</b>	Indiana Bulls, Indiana Sports Properties
<b>Cost:</b>	\$49 million
<b>Key Indoor Facility Components:</b>	8 basketball/volleyball/futsal courts 3 full-sized soccer fields
<b>Key Outdoor Facility Components:</b>	26 baseball/softball fields 31 soccer fields (8 lighted)



In 2014, Grand Park, the largest sports complex of its kind opened 30 miles north of Indianapolis. The 400-acre outdoor complex includes 24 grass and seven synthetic turf rectangle fields eight of which are lighted and one championship stadium. There are a total of 26 outdoor diamonds, 18 are grass and four are full size synthetic turf and four junior size synthetic turf fields.



The total development cost for Grand Park was approximately \$49 million. The initial goal was to fund the entire project through TIF and sponsorship revenue, but due to sponsorship shortfalls and site upgrades, the City of Westfield contributed approximately \$6 million from a city infrastructure fund.

In 2015, Grand Park was host to more than 75 tournaments over 213 days with nearly 4,800 teams that participated. A recently published economic impact report stated that Grand Park saw 1.4 million visitors, a 53 percent increase from 2014, of which more than 650,000 were overnight visitors. In total, the complex generated an estimated \$150 million in economic impact in 2015.

The success of Grand Park has sparked additional development as well as private investments into the complex. In 2016, private investors completed the \$8.5 million Jonathan Byrd's Fieldhouse. The 88,000 square foot facility offers eight basketball or 16 volleyball courts, a rehab/strength and conditioning area, restaurant and retail space as well as concessions, among other amenities.

The campus is also seeing current development of a \$20 million indoor sports and event center expected to open in summer 2016. In 370,000 square foot facility will house three full size professional soccer fields flexible to accommodate other rectangle field sports. The facility will also offer office and meeting space, locker rooms and a restaurant. The Indoor Sports Arena at Grand Park is being constructed as a public-private partnership which the city will lease for 25 years at \$53 million (with interest).

Future development includes the proposed 110,000 square foot Cambria Suites and Hotel that will feature approximately 150 guest rooms and 5,000 square feet of meeting and conference space.

<b>FACILITY:</b>	<b>LEGACY PARK</b>
<b>City, State:</b>	Lee's Summit, Missouri
<b>Year Opened:</b>	1997
<b>Owner:</b>	Lee's Summit Parks and Recreation
<b>Operator:</b>	Lee's Summit Parks and Recreation
<b>Cost:</b>	-
<b>Key Facility</b>	16 baseball fields
<b>Components:</b>	8 softball fields 12 natural grass soccer fields 3 multipurpose fields 45,000 SF Community Center with gymnasium, indoor aquatics, racquetball, 22-acre lake, disc golf course, amphitheater, Destination Playground, 4.7 mile trail



The 692-acre complex was built in 1997 with funding from a 3/8 cent sales tax. Legacy Park offers 12 natural grass soccer fields, 16 baseball fields, eight softball fields, three football fields and a 45,000 square foot community center. In 2012, park improvements were made that include practice fields for baseball, soccer and football and two t-ball fields, among others. The complex is owned and operated by the Lee's Summit Parks and Recreation Department, with the soccer fields leased by the Lee's Summit Soccer Association in order to accommodate the groups practice and league play.

Developers in Lee's Summit are in the planning stages of a new \$230 million sports complex and entertainment village on the northeast corner of Interstate 470 and View High Drive. A new 15-field complex would be part of a larger, 130-acre development that could include a 200-room hotel, entertainment options, restaurants and upscale apartments.

The complex is owned by the Parks department but rented out through 501(c) 3 volunteer organizations who are in charge of the park's maintenance and operations throughout the year (the park department essentially acts as a landlord and makes capital improvements). The tenants include Sporting Lee's Summit, Lee's Summit Girls Softball Association, Lee's Summit Baseball Association, Lee's Summit Football Association, Lee's Summit Soccer Association.

The Park charges the associations \$3 per athlete for the high seasons of the year; tournaments must be approved by the park department at the beginning of the year and then the park department charges the associations \$30/team; the associations then charge the participating athletes what they want.

In a recent year of operations, the Park hosted a total of 25 tournaments comprised of 10 baseball tournaments, 13 softball, and two soccer. Legacy Park Community Center recorded \$923,900 in revenues and \$978,800 in operating expenses, for a year end operating deficit of \$54,800.

**FACILITY: SHEELS OVERLAND PARK SOCCER COMPLEX****City, State:** Overland Park, Kansas**Year Opened:** 2009**Owner:** City of Overland Park**Operator:** City of Overland Park**Cost:** \$36 million**Key Facility** 96 acres**Components:** 12 lighted, regulation-size synthetic turf fields  
Field cooling system to regulate turf temperature  
Basketball and Tennis courts  
1,100 square feet of meeting space

Opened in 2009, the Scheels Overland Park Soccer Complex ("SOPSC") comprises 96 acres and is considered one of the premier soccer complexes in the country. SOPSC offers 12 lighted, regulation-size synthetic-turf fields. Scheels Overland Park Soccer Complex is owned and operated by the City of Overland Park. SOPSC cost approximately \$36 million to build. Funding was provided by the City of Overland Park through a general bond secured by a hotel tax increase of three percent (from six percent to nine percent). As a result, income from facility operations is not required to support debt payments.



In 2014, the SOPSC hosted approximately 20 tournaments. The sports complex has hosted several large tournaments in the past, including the Kansas State Cup, USYSA Region II President's Cup, US Adult Soccer Regional and National Championships, USYSA National Championships and VW Masters. Approximately 40 percent of the tournaments hosted at the facility reached their maximum number of participating teams (approximately 210). Most of the tournaments hosted at SOPSC are regional tournaments, with the complex management estimating approximately 25 to 35 percent of participants and visitors originate beyond the local market and require hotel accommodations.

Scheels Overland Park Soccer Complex works with five external tournament organizers each year to schedule tournaments. When the complex first opened, management decided to work with tournament organizers to accelerate utilization at the sports complex in the first few years of operations. Each tournament organizer schedules between three and four tournaments at the complex annually, on average.

Most of the tournaments hosted at SOPSC are regional tournaments, with the complex management estimating approximately 25 to 35 percent of participants and visitors originate beyond the local market and require hotel accommodations. Management at SOPSC cited having a strong state association within sport governing bodies as well as a good volunteer base required to win the bidding process for national tournaments as factors for success in winning national and larger regional tournaments.

Overall, SOPSC management estimates each field hosts between 2,000 and 3,000 games annually (or between 24,000 and 36,000 games total). With this many hosted games, the complex attracted a total of approximately 996,000 visitors in 2013, consisting of approximately 176,000 league and tournament participants, 702,000 spectators, and 118,000 weekday participants. SOPSC generates an estimated



economic impact of \$10 million annually, driven mainly by the approximately 40,000 hotel nights generated by tournaments annually.

SOPSC management indicated that the complex's rental rates are lower than the standard market rates in their area. For example, Sporting KC charges approximately \$115 per hour to rent one of their auxiliary fields, approximately 50 percent higher than the most expensive hourly rental rate at SOPSC. The sports complex was originally planned as a community asset, and rental rates at SOPSC were initially set low in order to acclimate the residents in the area to higher rates; residents had previously only paid \$1.00 to rent city facilities. Rental rates were also able to be set low because the sports complex is not required to cover debt with revenues generated by SOPSC.

The quality of the fields at SOPSC helped to curb area pushback on the rental fee rates when they were initially introduced, though management believes they could raise their current fees between \$20 and \$30 per hour without a significant loss in utilization. However, rental rates have only increased approximately \$7.00 per hour over the past seven years.

The table to the right outlines the financial performance of Scheels Overland Park Soccer Complex from 2010 to 2014.

Over the past five years, SOPSC has generated between \$1.2 million and \$1.4 million in annual revenue from field rental, concessions, sponsorships and other sources. Operating expenses have ranged from approximately \$960,000 to \$1.2 million over the past five years, resulting in a net income from operations ranging from approximately \$200,000 and \$360,000 during this period, with an average variance in EBITDA of 11 percent.

SOPSC achieved this level of operating income despite charging below market rental rates, the lack of a naming rights agreement (the naming rights deal with Scheels All Sports was negotiated in June 2015 which provides for \$125,000 in additional annual revenue), no in-house generated tournaments, and the lack of gate or parking fees.

Scheels All Sports signed a five-year exclusive naming rights deal for SOPSC worth \$625,000 (or \$125,000 per year) in June 2015. In addition, Scheels will incur the cost to install new name signage throughout the Park as well as providing \$4,000 for new uniforms with the new name and logo. The City plans to save the sponsorship revenue to replace turf fields at the complex at a future date.

SCHEELS OVERLAND PARK SOCCER COMPLEX FINANCIAL PERFORMANCE					
	2010	2011	2012	2013	2014
<b>Revenues</b>					
Field Rental	\$782,615	\$784,351	\$842,044	\$983,578	\$794,557
Concessions	\$257,964	\$274,768	\$327,722	\$317,920	\$289,816
Sponsorships	\$65,000	\$45,500	\$76,500	\$72,000	\$88,300
Other Rental Income	\$94,506	\$90,078	\$98,398	\$96,380	\$84,648
Other Revenues	\$18,510	\$13,907	\$92,826	\$18,136	\$25,547
<b>Total Revenues</b>	<b>\$1,218,595</b>	<b>\$1,208,605</b>	<b>\$1,437,491</b>	<b>\$1,488,013</b>	<b>\$1,282,868</b>
<b>Expenses</b>					
Salaries, Wages and Benefits	\$395,272	\$393,331	\$442,623	\$475,086	\$452,811
Utilities	\$206,255	\$248,675	\$214,779	\$219,671	\$251,724
Repairs and Maintenance	\$186,616	\$232,433	\$250,321	\$278,797	\$210,437
Contractual Services	\$47,959	\$57,985	\$63,451	\$59,331	\$47,830
Operating Supplies	\$26,139	\$10,864	\$28,280	\$42,403	\$30,412
Insurance and Bonds	\$46,472	\$50,254	\$53,850	\$56,635	\$47,489
Construction Supplies	\$12,027	\$2,551	\$12,485	\$8,191	\$4,244
Communications	\$4,502	\$5,732	\$6,115	\$7,318	\$5,272
Leases/Rentals	\$25,981	\$7,176	\$4,952	\$12,257	\$9,873
Office Expenses	\$8,886	\$3,378	\$3,473	\$6,060	\$2,259
<b>Total Expenses</b>	<b>\$960,107</b>	<b>\$1,012,380</b>	<b>\$1,080,328</b>	<b>\$1,165,748</b>	<b>\$1,062,352</b>
<b>EBITDA<sup>1</sup></b>	<b>\$258,488</b>	<b>\$196,225</b>	<b>\$357,163</b>	<b>\$322,265</b>	<b>\$220,516</b>

<sup>1</sup> EBITDA is defined as earnings before interest, taxes, depreciation and amortization.

Source: City of Overland Park.

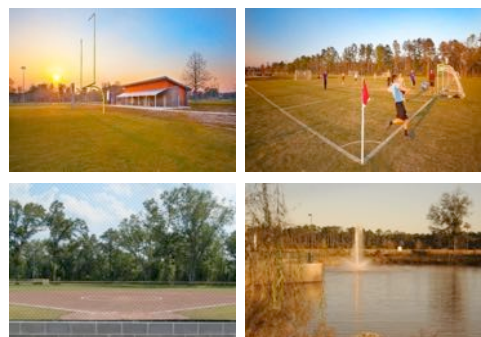
**FACILITY:** CHAPPAPEELA SPORTS PARK  
**City, State:** Hammond, Louisiana  
**Owner:** Hammond Area Recreation District No. 1  
**Operator:** Hammond Area Recreation District No. 1  
**Cost:** \$17 million  
**Key Indoor Facility Components:** Gymnasium with 2 courts  
**Key Outdoor Facility Components:** 21 soccer fields  
 6 baseball fields  
 6 softball fields  
 2 football fields

The 90-acre Chappapeela Sports Park opened in January of 2013 at a construction cost of \$17.0 million and is owned and operated by Hammond Area Recreation District No. 1 in Tangipahoa Parish, Louisiana. Funding for the complex came from a 15-year ad valorem tax, which was approved by local voters in 2010. Current tenants of the facility include the South Tangi Youth Soccer Association, Tangi Knockerball and Grand Slam Louisiana.

The Park offers 21 soccer/multi-sport fields, 12 baseball and softball diamonds, two football fields, an indoor complex with two basketball courts, three playgrounds, a splash park and a 1.5 mile walking and jogging trail. 36 tournaments were held at the complex in 2015, with 29 of them comprising of baseball and softball groups and the other six comprising of soccer, lacrosse and football groups. A detailed calendar illustrating the Park's tournaments in 2015 is shown to the right. Note that there are only seven weekends out of the year that went formally "unbooked".

Since its opening, Chappapeela Sports Park has averaged an annual operating deficit of just over \$1.2 million. User and program fees serve as its primary revenue generators, and the Park makes approximately \$138,500 from these sources per year. Salaries/wages/benefits and repair/maintenance represent the Park's two most significant annual expenditures, averaging \$730,300 and \$451,800 per year, respectively.

Baseball and softball groups generally pay \$200 per field per day at Chappapeela Sports Park, while football groups pay \$400 per field per day, and indoor groups pay \$500 per court per day. Soccer users' rental rates can widely vary depending on seasonality and the availability of the complex, with prices ranging between \$240 to \$500 per field per day.



2015 Tournament Utilization by Week

January	May	September
1	18	36
2	19	37
3	20	38
4	21	39
5	22	
February	June	October
6	23	40
7	24	41
8	25	42
9	26	43
March	July	November
10	27	44
11	28	45
12	29	46
13	30	47
	31	48
April	August	December
14	32	49
15	33	50
16	34	51
17	35	52

Calendar Key	
<span style="background-color: black; color: black;"> </span>	Facility Closed
<span style="background-color: green; color: black;"> </span>	Tournament Booked
<span style="background-color: red; color: black;"> </span>	Cancelled Tournament
<span style="background-color: white; border: 1px solid black;"> </span>	Facility unbooked
<span style="background-color: gray; color: black;"> </span>	Holiday

Source: Facility Management, 2016

**FACILITY:** SPORTS PAVILION LAWRENCE

**City, State:** Lawrence, Kansas

**Owner:** City of Lawrence

**Operator:** City of Lawrence

**Cost:** \$24.5 million

**Key Facility Components:** 181,000 sf facility  
8 regulation size basketball courts/16 volleyball courts  
Additional amenities include, indoor turf facility, 1/8 mile indoor track, cardio and aerobic fitness area, gymnastics area, two party rooms and a future 7,000 sf wellness area  
9 full-time and 15-18 part-time/seasonal staff members  
Concession stands are operated by the Clinton Parkway Hy-Vee and regulated by the Parks & Rec nutritional standards



The City of Lawrence and the University of Kansas have partnered on the \$63.5 million Sports Pavilion Lawrence at Rock Chalk Park, which is located in Lawrence, Kansas, approximately 40 miles southwest of Parkville. The facility includes a \$24.5 million, 181,000 square foot indoor recreation center that features eight full-size basketball courts, 16 full-size volleyball courts, and indoor soccer/sports area, a 1/8-mile track, a fitness center, meeting rooms and other ancillary spaces. The City of Lawrence funded 22.5 million of the total costs for the overall project, with the remaining \$2 million donated by Bill and Cindy Self's Assist Foundation.

The facility also includes a \$39 million development for the University of Kansas, consisting of a 1,500-seat softball stadium, a 2,500-seat soccer stadium, a 10,000-seat track and field complex, and a 28,000 square foot indoor training building. Given the facility's association with the University of Kansas, it was expected that the facility would generate a steady level of programming. Notably, when facilities are not rented out to organizations, the gyms are open to the public. Access to the facility's gyms is free for local residents, but non-residents are required to pay a \$5 fee for a daily pass, \$20 for a monthly pass, \$45 for a 90-day pass and \$150 for an annual pass. To rent the facilities, tournament organizers must pay the rental fees shown below:

Since its opening in September of 2014, Sports Pavilion Lawrence primarily hosts its tournament activity during the period beginning in January and running through July. There is reportedly little tournament utilization in August and September. In 2015, the facility held a total of 37 events, including 16 basketball tournaments, six basketball camps, 13 volleyball tournaments, one futsal tournament and one holiday party. The Sunflower Showcase was the complex's most notable event, and featured 150 boys basketball teams from around the country.



**FACILITY:** GREENSBORO SPORTSPLEX/AQUATIC CENTER

**City, State:** Greensboro, North Carolina

**Owner:** City of Greensboro Parks and Recreation Department

**Operator:** City of Greensboro Parks and Recreation Department

**Cost:** \$6.0 million

**Key Facility Components:** 106,000 square foot multi-purpose sports facility  
8 full-sized basketball/volleyball courts  
4 indoor soccer fields  
Inline roller hockey rink  
Weight room, fitness center, concession area  
Conference room  
Aquatics: 8-lane, 50-meter competition pool, 25-yard teaching pool with 17-foot-deep diving well.



The Greensboro Sportsplex is a multi-purpose sports facility located in Greensboro, North Carolina. The facility was owned and operated by a private organization prior to the City of Greensboro purchasing the complex for \$6 million in 2002. The City of Greensboro originally allocated \$8.8 million out of a \$34.0 million voter approved general obligation bond package to fund the construction of a new facility. The general obligation bonds are supported by property taxes. The Greensboro Aquatic Center is a 78,300-square-foot aquatic facility built in 2011 as part of a major expansion to the campus.

The complex is currently owned and operated by the City of Greensboro Parks and Recreation Department. The 106,000-square foot Sportsplex contains eight basketball and volleyball courts on suspended hard wood floors, four state-of-the-art indoor soccer fields and an inline hockey rink. Additionally, the Sportsplex contains a weight room and fitness center. The Aquatic Center offers one 8-lane, 50-meter stretch competition pool, and one, 25-yard teaching pool with 17-foot-deep diving well. Diving boards and platforms include two, 1-meter spring boards; two, 3-meter spring boards, and 5-meter, 7.5-meter, and 10-meter platforms. Four classrooms and a fitness room are also available to the aquatics programs. Permanent spectator seating at the facility can accommodate 1,848 guests, while removable bleacher seating offers an additional 652 seats.

The facility offers year-round leagues for adults and kids and is the host for Delaney Rudd's North Carolina Basketball Academy. The Sportsplex has hosted several tournaments including the AAU Girls Tournaments and Achievements Unlimited Basketball School. The basketball facilities are also available for open play for members of the complex. Other tenants include Piedmont Volleyball Club, Star Aquatics, Greensboro Swim Association and Greensboro YMCA Swim Club. Additionally, the Aquatic Center at the complex hosts between 45 to 50 swimming and/or diving events per year. The Aquatic Center is home to three year-round swimming clubs (Star Aquatics, Greensboro Swim Association, and the Greensboro YMCA swim club); four area high schools, which practice from October through mid-February; and one year-round diving club. Star Aquatics and Greensboro Swim Association, both of which utilize the pool between 35 and 40 hours per week (seven to eight lanes, on average, per hour). In addition to facility-tenant use, there are a number of public programs offered, including learn to swim classes (both children and adult), beginning synchronized swimming, beginning diving, beginning swim team, beginning splash ball, and water aerobics. Most programs cost \$70 per 8-lesson session. There are generally 10 to 12 sessions of each program.

In a recent year of operations, the SportsPlex attracted approximately 107,000 attendees and achieved a cost recovery of approximately 69 percent. The facility hosts approximately 45 basketball tournaments annually in addition to 12 to 15 volleyball tournaments per year. The facility generated \$591,000 in operating revenue compared to nearly \$1 million in operating costs, 40 percent of which are related to personnel costs. For court rentals, residents typically pay approximately \$60 per hour, while non-residents (such as tournament organizers) pay approximately \$90 per hour.

**FACILITY:** LAWRENCE AQUATIC CENTER

**City, State:** Lawrence, Kansas

**Owner:** Lawrence Parks and Recreation

**Operator:** Lawrence Parks and Recreation

**Cost:** \$9.5 million

**Key Facility Components:** 10-lane, 50-meter competition pool featuring:

- moveable bulkhead
- (2) 1-meter springboards
- (1) 3-meter springboards

Separate recreation pool



The Lawrence Aquatic Center was built in 2001 on land donated by the Lawrence School District at a cost of \$9.5 million. Funding for the facility was secured through a countywide one cent sales tax adopted in 1994. This tax is also used to cover annual operating deficits of the facility. The facility is operated by the Lawrence Parks and Recreation Department's Aquatics Division, providing a safe and inviting environment for the community. Community programs include swimming lessons, exercise classes, and lifeguard training classes.

The Aquatic Center features a 10-lane, 50-meter competition pool with diving well. The diving well offers two one-meter springboards and one three-meter springboard. USA Swimming holds approximately eight meets at the Lawrence Aquatic Center per year, while in-state high school meets frequent the facility six to seven times annually. The Center's tenants include Ad Astra and Aquahawks, which are both USA-affiliated swimming clubs. Competition organizers must pay on a per-swimmer basis to use the Center for meets, with \$5 per swimmer required from local groups and \$7.50 per swimmer from non-local groups.

A separate family recreation pool has a zero-depth entry, waterslide, and various interactive water activities for children. The local high school is attached to the facility through a tunnel, but the two buildings are operated separately. The school does rent the pool's space, but is not directly responsible for operating costs. Additionally, an 880-square-foot meeting room is available to rent for birthday parties, meetings, and other functions.

In a recent year of operations, the Lawrence Aquatic Center collected \$446,000 in operating revenues and generated \$931,000 in operating expenses. The resulting net operating deficit totaled approximately \$485,000.

**FACILITY:** HOWARD M. TERPENNING RECREATION COMPLEX  
**City, State:** Beaverton, Oregon

**Owner:** Tualatin Hills Parks and Recreation Department

**Operator:** Tualatin Hills Parks and Recreation Department

**Key Indoor Facility** Tennis Center with 4 indoor courts  
10-lane, 50-meter pool with platform diving towers:

- Components:**
- (2) 1-meter springboards
  - (2) 3-meter springboards

**Key Outdoor Facility** 3 grass soccer fields  
2 synthetic turf soccer fields  
**Components:** 7 lighted softball/baseball fields  
6 lighted outdoor tennis courts  
Skate park, roller hockey rink



The Tualatin Hills Parks and Recreation Department (THPRD) owns and operates this 90-acre park. The park offers a wide variety of indoor and outdoor programming spaces, including an Aquatic Center with a 50-meter pool and platform diving towers, a Tennis Center with four indoor courts and six lighted outdoor courts (all of the outdoor courts are covered with large air structures during the winter months), three grass soccer fields, two synthetic turf soccer fields, seven lighted softball/baseball fields, a skate park and a roller hockey rink.

In addition to three large maintenance buildings located throughout the park, the THPRD administrative offices are also located on this site. There are 619 free parking spaces available at the complex. There are four on-site storage facilities offering a total of approximately 166,400 square feet of total storage, work and office space.

The Complex's aquatic facility, the Tualatin Hills Aquatic Center, features a 50-meter competitive pool, diving towers, two one-meter springboards, and two three-meter springboards. Tenants of the Aquatic Center include Tualatin Hills Swim Club, Tualatin Hills Dive Club, Tualatin Hills Synchronized Swimming, Tualatin Hills Barracudas, and Tualatin Hills Water Polo Club.

In a recent year, the Tualatin Hills Aquatic Center generated approximately \$470,000 in operating revenues and \$1.25 million in operating expenses, resulting in a net operating deficit of approximately \$783,000.

Beaverton is located near the Washington and Oregon border, within a short driving distance of many mid-to large-markets along the west coast, including 43 miles to Salem, Oregon; 106 miles from Eugene, Oregon; 150 miles from Tacoma, Washington; and 181 miles from Seattle, Washington.

**FACILITY:** NEW BALANCE TRACK AND FIELD CENTER**City, State:** New York, New York**Owner:** The Armory Foundation**Operator:** The Armory Foundation**Cost:** \$30 million**Key Facility Components:** Elevated seating for 3,500  
200-meter 6-lane banked Mondo track  
2 large runways and sand pits  
Pole vault pit

Opened in 1909 and renovated in 1993 at a cost of \$30.0 million, the 168th Street Armory, also known as The Armory, is located in the Washington Heights community. The 60,000 square foot New Balance Track & Field Center at The Armory has a 200 meter, six-lane banked Mondo track, two large runways and sand pits, a pole vault pit, a throws cage and elevated seating for 3,500 spectators that is expandable to 5,000 with additional temporary seating in the turns. The venue hosts more than 100 track events (ranging in size from 100 to 5,000 runners) and accommodates more than 125,000 athletes of all ages at The Armory each year. Track events are hosted from late October through late March each year. More than 2,000 New York City students train at the track Monday through Friday from November to April.

The venue hosts numerous high school, college, and professional/open/masters level meets each year, including the NSIC indoor national meet, the Big East and Metro Atlantic Conference meets, the Millrose Games, and the New Balance Games. Several college programs use The Armory as their home indoor track including Columbia University, New York University, Saint John's University, St. Francis College, City College of New York and Iowa College. The facility is also used for other events such as Columbia University commencement exercises, tradeshow, corporate conferences, movie shoots and other such uses.

The Armory Foundation also runs the 15,000 square foot National Track and Field Hall of Fame, operates the largest after-school activity center in New York and offers a variety of community support programs.

The Charles B. Rangel Technology & Learning Center is located in the Armory and offers computer-based literacy programs for young children, technical skills training for middle and high school students and adult courses. Its mission is to serve as a focal point for job skill development, lifelong learning and community building for all ages. Each year, more than 3,000 users come to the facility for free programs, including General Education Development (GED) High School Equivalency Test preparation and English as a Second Language (ESL) classes. The Center also offers introductory computer courses such as basic internet, email and Microsoft Access and Excel information.

Based on 2013 audited financials, the Armory Foundation generated \$3.8 million in operating revenues and incurred \$4.0 million in operating expenses.

**New Balance Track and Field Center  
2013 Financials****Revenues**

Program Revenue	\$1,300,000
Venue Rental	\$981,000
Sponsorships	\$950,000
Admissions	\$298,000
Other Revenues	\$240,000

**Total Revenues** \$3,769,000

**Expenses**

Salaries, Wages and Benefits	\$2,100,000
Supplies and Equipment	\$613,000
Event Travel	\$263,000
Track Officials and Coaches	\$200,000
Public Relations and Marketing	\$144,000
Other Expenses	\$680,000

**Total Expenses** \$4,000,000

**Net Income/Loss** (\$231,000)



**FACILITY:** REGGIE LEWIS TRACK AND ATHLETIC CENTER

**City, State:** Roxbury, Massachusetts

**Owner:** Roxbury Community College

**Operator:** Roxbury Community College

**Cost:** \$17 million

**Key Facility Components:** 3,500 seats  
200-meter 6-lane banked Mondo track  
60-meter straightaway on track's infield  
High jump, long/triple jump and pole vault pits on track's infield  
1,300-seat gymnasium  
Dance studio, weight and fitness room, multi-purpose meeting rooms



The Reggie Lewis Track and Athletic Center consists of a 3,500-seat indoor track and 1,300-seat gymnasium that accommodates basketball, volleyball and wrestling. The \$17.0 million state-funded complex opened in 1995 and is owned and operated by Roxbury Community College ("RCC"). The construction of the venue was the culmination of a 30+ year effort by the Massachusetts State Track Coaches Association ("MSTCA") to build a facility dedicated to statewide Massachusetts public high schools track and field meets. In 2014, the state of Massachusetts spent \$4.0 million on renovations and repairs of the facility.

Located on the RCC campus about five miles south of the Boston city center, the 130,000 square foot Reggie Lewis Track and Athletic Center includes a 200-meter, six lane banked Mondo track that is known as one of the fastest track surfaces in the world and the site of 41 World or American Records. The facility accommodates high jump, long/triple jump, pole vault and a 55/60 meter dash runway on the track infield.

In 2015, the Reggie Lewis Track and Athletic Center will host more than 90 high school, collegiate and professional track meets including the USA Track and Field Championships, USA Masters National Championships, Boston Indoor Games, Northeast 10 Championships, NCAA Division II Championships, High School National Championships, New England High School Championships, Massachusetts All State Championships, the nationally televised Boston Indoor Games and other collegiate meets, high school dual league meets and youth meets.

In addition to accommodating a wide variety of athletic activities, the venue has meeting rooms and a gymnasium, which are available for rent to the public. In a recent year of operations, the Reggie Lewis Track and Athletic Center reported revenues of \$1.2 million and expenses of \$1.1 million, resulting in a net income of approximately \$100,000. It should be noted that the Center generated \$454,000 in revenues from its operations and received the remainder of its revenue from a \$475,000 appropriation from RCC and \$278,000 from RCC's All-Purpose Trust Fund. Outside groups typically pay a fee of \$250 per hour to rent the facility for training and competitions.

## **APPENDIX E: COMPARABLE FACILITY MARKET DEMOGRAPHIC DATA**



Exhibits 1 through 4 present detailed demographic data in regard to markets offering comparable triangle field facilities.

**Exhibit 1**  
**Market Population – Triangle Facilities**

Peer Markets	30-minute	90-minute	180-minute
Westfield, IN	513,880	2,916,538	14,320,794
Vancouver, WA	853,422	2,739,271	5,803,153
Hammond, LA	222,457	2,630,402	5,774,490
Lee's Summit, MO	809,360	2,600,064	4,896,545
Elizabethtown, KY	139,349	2,189,507	9,981,034
Eugene, OR	316,224	1,002,100	4,024,008
Branson, MO	71,518	759,197	2,923,048
Boise, ID	446,541	746,490	970,474
Redding, CA	156,331	403,030	3,513,653
Medford, OR	180,809	333,895	1,049,265
Gillette, WY	45,357	87,752	418,142
<b>Average (excluding Eugene)</b>	<b>343,902</b>	<b>1,540,615</b>	<b>4,965,060</b>
<b>Eugene Rank (out of 11)</b>	<b>5</b>	<b>6</b>	<b>6</b>

Comparable Facilities in Larger Markets	30-minute	90-minute	180-minute
Plano, TX	2,304,834	7,113,327	10,135,090
Beaverton, OR	1,232,814	2,904,059	5,254,784
Overland Park, KS	1,187,337	2,717,983	5,572,975
Shawnee Mission, KS	1,187,081	2,696,828	5,845,834
Round Rock, TX	1,047,932	2,933,430	13,879,838
<b>Average</b>	<b>1,392,000</b>	<b>3,673,125</b>	<b>8,137,704</b>

Note: Data sorted by 90-minute drive time.

Source: Esri, 2016

**Exhibit 2**  
**Market Average Household Income – Triangle Facilities**

Peer Markets	30-minute	90-minute	180-minute
Vancouver, WA	\$70,834	\$76,563	\$73,922
Gillette, WY	\$82,450	\$73,918	\$67,304
Lee's Summit, MO	\$70,236	\$72,167	\$65,325
Hammond, LA	\$73,882	\$66,726	\$62,766
Westfield, IN	\$94,771	\$66,370	\$65,973
Elizabethtown, KY	\$61,026	\$64,629	\$64,805
Boise, ID	\$68,661	\$64,516	\$62,354
Eugene, OR	\$59,011	\$61,339	\$71,181
Redding, CA	\$61,227	\$59,467	\$72,772
Medford, OR	\$59,675	\$56,757	\$57,330
Branson, MO	\$53,421	\$54,038	\$54,763
<b>Average (excluding Eugene)</b>	<b>\$69,618</b>	<b>\$65,515</b>	<b>\$64,731</b>
<b>Eugene Rank (out of 11)</b>	<b>10</b>	<b>8</b>	<b>3</b>

Comparable Facilities in Larger Markets	30-minute	90-minute	180-minute
Plano, TX	\$102,247	\$83,572	\$76,634
Round Rock, TX	\$83,947	\$78,610	\$76,927
Beaverton, OR	\$81,413	\$76,144	\$73,281
Shawnee Mission, KS	\$79,088	\$72,534	\$65,223
Overland Park, KS	\$78,369	\$72,271	\$65,126
<b>Average</b>	<b>\$85,013</b>	<b>\$76,626</b>	<b>\$71,438</b>

Note: Data sorted by 90-minute drive time.

Source: Esri, 2016

**Exhibit 3**  
**Market Median Age – Triangle Facilities**

Peer Markets	30-minute	90-minute	180-minute
Medford, OR	41.4	44.9	42.5
Branson, MO	42.6	39.5	38.6
Redding, CA	41.4	39.0	37.1
Elizabethtown, KY	36.3	38.9	37.8
Eugene, OR	37.7	38.0	38.8
Vancouver, WA	36.9	37.6	37.9
Lee's Summit, MO	38.0	37.0	37.5
Westfield, IN	36.7	36.9	37.7
Hammond, LA	36.8	36.8	36.9
Gillette, WY	32.8	35.8	38.3
Boise, ID	34.9	34.8	35.2
<b>Average (excluding Eugene)</b>	<b>37.8</b>	<b>38.1</b>	<b>38.0</b>
<b>Eugene Rank (out of 11)</b>	<b>7</b>	<b>7</b>	<b>10</b>

Comparable Facilities in Larger Markets	30-minute	90-minute	180-minute
Beaverton, OR	37.4	37.6	38.1
Overland Park, KS	36.6	37.2	37.3
Shawnee Mission, KS	36.4	37.1	37.0
Plano, TX	34.8	34.5	35.3
Round Rock, TX	33.2	33.8	34.1
<b>Average</b>	<b>35.7</b>	<b>36.0</b>	<b>36.4</b>

Note: Data sorted by 90-minute drive time.

Source: Esri, 2016

**Exhibit 4**  
**Market Corporate Base – Triangle Facilities**

Peer Markets	30-minute	90-minute	180-minute
Vancouver, WA	35,860	118,865	248,440
Hammond, LA	11,367	112,851	243,308
Lee's Summit, MO	32,804	104,764	208,462
Westfield, IN	23,348	104,071	542,149
Elizabethtown, KY	5,251	86,341	387,196
Eugene, OR	15,248	42,977	178,862
Branson, MO	4,945	36,648	129,574
Boise, ID	21,106	30,301	41,848
Redding, CA	9,274	22,051	139,524
Medford, OR	10,250	17,215	52,869
Gillette, WY	2,200	4,630	23,280
<b>Average (excluding Eugene)</b>	<b>15,641</b>	<b>63,774</b>	<b>201,665</b>
<b>Eugene Rank (out of 11)</b>	<b>5</b>	<b>6</b>	<b>6</b>

Comparable Facilities in Larger Markets	30-minute	90-minute	180-minute
Plano, TX	108,045	270,769	389,280
Beaverton, OR	62,373	124,837	224,488
Round Rock, TX	41,408	112,543	517,986
Overland Park, KS	52,019	108,899	236,964
Shawnee Mission, KS	51,597	108,082	249,133
<b>Average</b>	<b>63,088</b>	<b>145,026</b>	<b>323,570</b>

Note: Data sorted by 90-minute drive time.  
Source: Esri, 2016

Exhibits 5 through 8 present key market demographic metrics from markets with comparable rectangle field facilities.

**Exhibit 5**  
**Market Population – Rectangle Field Facilities**

Peer Markets	30-minute	90-minute	180-minute
Germantown, MD	638,193	8,526,903	18,469,601
Greensboro, NC	606,215	4,031,201	11,285,614
Westfield, IN	513,880	2,916,538	14,320,794
Vancouver, WA	853,422	2,739,271	5,803,153
Hammond, LA	222,457	2,630,402	5,774,490
Lee's Summit, MO	809,360	2,600,064	4,896,545
Elizabethtown, KY	139,349	2,189,507	9,981,034
Frederica, DE	192,823	2,130,135	23,151,865
Lincoln, NE	314,109	1,428,683	3,332,942
Gatlinburg, TN	33,990	1,002,429	5,297,821
Eugene, OR	316,224	1,002,100	4,024,008
Branson, MO	71,518	759,197	2,923,048
Boise, ID	446,541	746,490	970,474
Redding, CA	156,331	403,030	3,513,653
Medford, OR	180,809	333,895	1,049,265
<b>Average (excluding Eugene)</b>	<b>369,928</b>	<b>2,316,982</b>	<b>7,912,164</b>
<b>Eugene Rank (out of 15)</b>	<b>7</b>	<b>11</b>	<b>10</b>

Comparable Facilities in Larger Markets	30-minute	90-minute	180-minute
Plano, TX	2,304,834	7,113,327	10,135,090
Frisco, TX	1,520,725	7,015,944	10,207,411
Redmond, WA	1,275,944	3,889,167	5,357,867
Round Rock, TX	1,047,932	2,933,430	13,879,838
Beaverton, OR	1,232,814	2,904,059	5,254,784
Shawnee Mission, KS	1,187,081	2,696,828	5,845,834
<b>Average</b>	<b>1,428,222</b>	<b>4,425,459</b>	<b>8,446,804</b>

Note: Data sorted by 90-minute drive time.  
Source: Esri, 2016

**Exhibit 6**  
**Market Average Household Income – Rectangle Field Facilities**

Peer Markets	30-minute	90-minute	180-minute
Germantown, MD	\$135,033	\$109,344	\$92,877
Frederica, DE	\$68,597	\$85,320	\$95,080
Vancouver, WA	\$70,834	\$76,563	\$73,922
Lee's Summit, MO	\$70,236	\$72,167	\$65,325
Lincoln, NE	\$67,460	\$71,490	\$68,556
Greensboro, NC	\$64,920	\$69,229	\$64,036
Hammond, LA	\$73,882	\$66,726	\$62,766
Westfield, IN	\$94,771	\$66,370	\$65,973
Elizabethtown, KY	\$61,026	\$64,629	\$64,805
Boise, ID	\$68,661	\$64,516	\$62,354
Eugene, OR	\$59,011	\$61,339	\$71,181
Gatlinburg, TN	\$56,745	\$59,616	\$56,224
Redding, CA	\$61,227	\$59,467	\$72,772
Medford, OR	\$59,675	\$56,757	\$57,330
Branson, MO	\$53,421	\$54,038	\$54,763
<b>Average (excluding Eugene)</b>	<b>\$71,892</b>	<b>\$69,731</b>	<b>\$68,342</b>
<b>Eugene Rank (out of 15)</b>	<b>13</b>	<b>11</b>	<b>5</b>

Comparable Facilities in Larger Markets	30-minute	90-minute	180-minute
Beaverton, OR	\$81,413	\$76,144	\$73,281
Frisco, TX	\$108,053	\$83,917	\$76,385
Plano, TX	\$102,247	\$83,572	\$76,634
Round Rock, TX	\$83,947	\$78,610	\$76,927
Shawnee Mission, KS	\$79,088	\$72,534	\$65,223
Redmond, WA	\$103,103	\$89,332	\$83,286
<b>Average</b>	<b>92,975</b>	<b>80,685</b>	<b>75,289</b>

Note: Data sorted by 90-minute drive time.  
Source: Esri, 2016



**Exhibit 7**  
**Market Median Age – Rectangle Field Facilities**

Peer Markets	30-minute	90-minute	180-minute
Medford, OR	41.4	44.9	42.5
Gatlinburg, TN	43.2	40.9	41.7
Frederica, DE	37.8	39.9	38.6
Branson, MO	42.6	39.5	38.6
Redding, CA	41.4	39.0	37.1
Elizabethtown, KY	36.3	38.9	37.8
Eugene, OR	37.7	38.0	38.8
Greensboro, NC	37.6	38.0	38.5
Vancouver, WA	36.9	37.6	37.9
Germantown, MD	39.3	37.5	38.3
Lee's Summit, MO	38.0	37.0	37.5
Westfield, IN	36.7	36.9	37.7
Hammond, LA	36.8	36.8	36.9
Lincoln, NE	33.9	35.7	36.5
Boise, ID	34.9	34.8	35.2
<b>Average (excluding Eugene)</b>	<b>38.3</b>	<b>38.4</b>	<b>38.2</b>
<b>Eugene Rank (out of 15)</b>	<b>8</b>	<b>8</b>	<b>13</b>

Comparable Facilities in Larger Markets	30-minute	90-minute	180-minute
Redmond, WA	37.4	37.8	38.1
Beaverton, OR	37.4	37.6	38.1
Shawnee Mission, KS	36.4	37.1	37.0
Plano, TX	34.8	34.5	35.3
Frisco, TX	35.3	34.4	35.3
Round Rock, TX	33.2	33.8	34.1
<b>Average</b>	<b>35.8</b>	<b>35.9</b>	<b>36.3</b>

Note: Data sorted by 90-minute drive time.  
Source: Esri, 2016

**Exhibit 8**  
**Market Corporate Base – Rectangle Field Facilities**

Peer Markets	30-minute	90-minute	180-minute
Germantown, MD	25,463	339,424	735,681
Greensboro, NC	29,815	164,493	441,723
Vancouver, WA	35,860	118,865	248,440
Hammond, LA	11,367	112,851	243,308
Lee's Summit, MO	32,804	104,764	208,462
Westfield, IN	23,348	104,071	542,149
Frederica, DE	7,248	93,157	931,049
Elizabethtown, KY	5,251	86,341	387,196
Lincoln, NE	13,626	61,179	151,958
Gatlinburg, TN	3,158	43,909	212,030
Eugene, OR	15,248	42,977	178,862
Branson, MO	4,945	36,648	129,574
Boise, ID	21,106	30,301	41,848
Redding, CA	9,274	22,051	139,524
Medford, OR	10,250	17,215	52,869

<b>Average (excluding Eugene)</b>	<b>16,680</b>	<b>95,376</b>	<b>318,987</b>
<b>Eugene Rank (out of 15)</b>	<b>7</b>	<b>11</b>	<b>10</b>

Comparable Facilities in Larger Markets	30-minute	90-minute	180-minute
Plano, TX	108,045	270,769	389,280
Frisco, TX	66,445	265,917	393,384
Redmond, WA	70,657	181,129	242,143
Beaverton, OR	62,373	124,837	224,488
Round Rock, TX	41,408	112,543	517,986
Shawnee Mission, KS	51,597	108,082	249,133
<b>Average</b>	<b>66,754</b>	<b>177,213</b>	<b>336,069</b>

Note: Data sorted by 90-minute drive time.

Source: Esri, 2016

Demographic data for markets offering indoor court facilities summarized in Exhibits 9 through 12.

**Exhibit 9**  
**Market Population – Indoor Court Facilities**

Peer Markets	30-minute	90-minute	180-minute
Libertyville, IL	944,287	10,498,139	15,409,426
Germantown, MD	638,193	8,526,903	18,469,601
Greensboro, NC	606,215	4,031,201	11,285,614
St. Peters, MO	994,325	2,980,289	6,012,967
Westfield, IN	513,880	2,916,538	14,320,794
Hampton, VA	641,259	2,743,952	1,002,100
Lawrence, KS	257,367	2,695,531	4,788,574
Hammond, LA	222,457	2,630,402	5,774,490
Fort Wayne, IN	447,602	2,076,565	17,847,100
Lincoln, NE	314,109	1,428,683	3,332,942
Gatlinburg, TN	33,990	1,002,429	5,297,821
Eugene, OR	316,224	1,002,100	4,024,008
Branson, MO	71,518	759,197	2,923,048
Myrtle Beach, SC	235,746	737,007	4,587,741
Sioux Falls, SD	227,484	603,804	2,129,131
<b>Average (excluding Eugene)</b>	<b>439,174</b>	<b>3,116,474</b>	<b>8,084,382</b>
<b>Eugene Rank (out of 15)</b>	<b>8</b>	<b>12</b>	<b>11</b>

Comparable Facilities in Larger Markets	30-minute	90-minute	180-minute
Plano, TX	2,304,834	7,113,327	10,135,090
Frisco, TX	1,520,725	7,015,944	10,207,411
Round Rock, TX	1,101,356	2,986,533	14,153,022
Beaverton, OR	1,232,814	2,904,059	5,254,784
<b>Average</b>	<b>1,539,932</b>	<b>5,004,966</b>	<b>9,937,577</b>

Note: Data sorted by 90-minute drive time.  
Source: Esri, 2016

**Exhibit 10**  
**Market Average Household Income – Indoor Court Facilities**

Peer Markets	30-minute	90-minute	180-minute
Germantown, MD	\$135,033	\$109,344	\$92,877
Libertyville, IL	\$110,701	\$83,902	\$78,421
Hampton, VA	\$68,258	\$75,008	\$61,339
St. Peters, MO	\$81,903	\$72,901	\$65,555
Lawrence, KS	\$59,670	\$72,692	\$66,451
Lincoln, NE	\$67,460	\$71,490	\$68,556
Greensboro, NC	\$64,920	\$69,229	\$64,036
Hammond, LA	\$73,882	\$66,726	\$62,766
Westfield, IN	\$94,771	\$66,370	\$65,973
Sioux Falls, SD	\$72,538	\$65,777	\$64,698
Eugene, OR	\$59,011	\$61,339	\$71,181
Gatlinburg, TN	\$56,745	\$59,616	\$56,224
Fort Wayne, IN	\$65,157	\$58,695	\$65,181
Branson, MO	\$53,421	\$54,038	\$54,763
Myrtle Beach, SC	\$57,967	\$53,540	\$58,881
<b>Average (excluding Eugene)</b>	<b>\$75,888</b>	<b>\$69,952</b>	<b>\$66,123</b>
<b>Eugene Rank (out of 15)</b>	<b>12</b>	<b>11</b>	<b>3</b>

Comparable Facilities in Larger Markets	30-minute	90-minute	180-minute
Frisco, TX	\$108,053	\$83,917	\$76,385
Plano, TX	\$102,247	\$83,572	\$76,634
Round Rock, TX	\$83,652	\$78,416	\$78,008
Beaverton, OR	\$81,413	\$76,144	\$73,281
<b>Average</b>	<b>\$93,841</b>	<b>\$80,512</b>	<b>\$76,077</b>

Note: Data sorted by 90-minute drive time.  
Source: Esri, 2016

**Exhibit 11**  
**Market Median Age – Indoor Court Facilities**

Peer Markets	30-minute	90-minute	180-minute
Myrtle Beach, SC	43.4	42.7	37.2
Gatlinburg, TN	43.2	40.9	41.7
Branson, MO	42.6	39.5	38.6
St. Peters, MO	38.9	39.1	39.0
Fort Wayne, IN	36.9	38.5	37.9
Eugene, OR	37.7	38.0	38.8
Greensboro, NC	37.6	38.0	38.5
Germantown, MD	39.3	37.5	38.3
Westfield, IN	36.7	36.9	37.7
Hammond, LA	36.8	36.8	36.9
Hampton, VA	35.2	36.8	38.0
Libertyville, IL	38.2	36.7	37.3
Lawrence, KS	33.7	36.5	37.1
Sioux Falls, SD	34.7	35.9	37.7
Lincoln, NE	33.9	35.7	36.5
<b>Average (excluding Eugene)</b>	<b>37.9</b>	<b>38.0</b>	<b>38.0</b>
<b>Eugene Rank (out of 15)</b>	<b>9</b>	<b>9</b>	<b>13</b>

Comparable Facilities in Larger Markets	30-minute	90-minute	180-minute
Beaverton, OR	37.4	37.6	38.1
Plano, TX	34.8	34.5	35.3
Frisco, TX	35.3	34.4	35.3
Round Rock, TX	33.3	33.9	34.1
<b>Average</b>	<b>35.2</b>	<b>35.1</b>	<b>35.7</b>

Note: Data sorted by 90-minute drive time.

Source: Esri, 2016

**Exhibit 12**  
**Market Corporate Base – Indoor Court Facilities**

Peer Markets	30-minute	90-minute	180-minute
Libertyville, IL	42,928	425,771	623,692
Germantown, MD	25,463	339,424	735,681
Greensboro, NC	29,815	164,493	441,723
St. Peters, MO	41,691	118,557	252,435
Hammond, LA	11,367	112,851	243,308
Hampton, VA	19,785	109,910	42,977
Lawrence, KS	11,381	108,097	202,922
Westfield, IN	23,348	104,071	542,149
Fort Wayne, IN	17,094	80,232	669,843
Lincoln, NE	13,626	61,179	151,958
Gatlinburg, TN	3,158	43,909	212,030
Eugene, OR	15,248	42,977	178,862
Myrtle Beach, SC	16,262	37,246	180,430
Branson, MO	4,945	36,648	129,574
Sioux Falls, SD	10,400	31,080	110,396
<b>Average (excluding Eugene)</b>	<b>19,376</b>	<b>126,676</b>	<b>324,223</b>
<b>Eugene Rank (out of 15)</b>	<b>9</b>	<b>12</b>	<b>11</b>

Comparable Facilities in Larger Markets	30-minute	90-minute	180-minute
Plano, TX	108,045	270,769	389,280
Frisco, TX	66,445	265,917	393,384
Beaverton, OR	62,373	124,837	224,488
Round Rock, TX	47,692	114,205	529,003
<b>Average</b>	<b>71,139</b>	<b>193,932</b>	<b>384,039</b>

Note: Data sorted by 90-minute drive time.

Source: Esri, 2016



Exhibits 13 through 16 present key market demographic metrics from markets with comparable indoor track facilities.

**Exhibit 13**  
**Market Population – Indoor Track Facilities**

Peer Markets	30-minute	90-minute	180-minute
Boulder, CO	720,974	3,586,252	4,852,825
Nashville, TN	787,140	2,599,696	8,783,776
Birmingham, AL	623,673	2,084,168	10,149,205
Fayetteville, AR	269,725	1,075,229	4,279,501
Eugene, OR	316,224	1,002,100	4,024,008
Nampa, ID	618,404	745,849	970,255
<b>Average (excluding Eugene)</b>	<b>603,983</b>	<b>2,018,239</b>	<b>5,807,112</b>
<b>Eugene Rank (out of 6)</b>	<b>5</b>	<b>5</b>	<b>5</b>

Comparable Facilities in Larger Markets	30-minute	90-minute	180-minute
New York, NY	5,504,581	20,199,046	34,888,031
Roxbury Crossing, MA	1,651,445	7,193,611	13,010,406
Seattle, WA	1,513,018	4,131,920	5,640,126
<b>Average</b>	<b>2,889,681</b>	<b>10,508,192</b>	<b>17,846,188</b>

**Exhibit 14**  
**Average Market Household Income – Indoor Track Facilities**

Peer Markets	30-minute	90-minute	180-minute
Boulder, CO	\$90,051	\$86,529	\$82,494
Nashville, TN	\$75,404	\$67,406	\$61,229
Nampa, ID	\$66,172	\$64,664	\$62,353
Birmingham, AL	\$67,395	\$62,931	\$65,603
Eugene, OR	\$59,011	\$61,339	\$71,181
Fayetteville, AR	\$65,521	\$58,032	\$59,375
<b>Average (excluding Eugene)</b>	<b>\$72,909</b>	<b>\$67,912</b>	<b>\$66,211</b>
<b>Eugene Rank (out of 6)</b>	<b>6</b>	<b>5</b>	<b>2</b>

Comparable Facilities in Larger Markets	30-minute	90-minute	180-minute
New York, NY	\$89,215	\$97,787	\$90,746
Roxbury Crossing, MA	\$95,536	\$93,235	\$87,532
Seattle, WA	\$96,779	\$88,699	\$82,696
<b>Average</b>	<b>\$93,843</b>	<b># \$93,240</b>	<b># \$86,991</b>

Note: Data sorted by 90-minute drive time.  
Source: Esri, 2016

**Exhibit 15**  
**Market Median Age – Indoor Track Facilities**

Peer Markets	30-minute	90-minute	180-minute
Birmingham, AL	37.7	38.5	37.2
Eugene, OR	37.7	38.0	38.8
Nashville, TN	35.7	36.5	39.0
Fayetteville, AR	31.5	36.3	37.7
Boulder, CO	36.5	36.3	36.5
Nampa, ID	34.4	34.8	35.2
<b>Average (excluding Eugene)</b>	<b>35.2</b>	<b>36.5</b>	<b>37.1</b>
<b>Eugene Rank (out of 6)</b>	<b>5</b>	<b>5</b>	<b>5</b>

Comparable Facilities in Larger Markets	30-minute	90-minute	180-minute
New York, NY	36.8	38.2	39.1
Roxbury Crossing, MA	34.8	39.5	40.6
Seattle, WA	38.0	37.8	38.1
<b>Average</b>	<b>36.5</b>	<b>38.5</b>	<b>39.3</b>

**Exhibit 16**  
**Market Corporate Base – Indoor Track Facilities**

Peer Markets	30-minute	90-minute	180-minute
Boulder, CO	31,862	165,346	222,879
Nashville, TN	43,614	104,902	353,268
Birmingham, AL	35,409	87,239	446,218
Fayetteville, AR	11,468	42,997	181,123
Eugene, OR	15,248	42,977	178,862
Nampa, ID	25,451	30,234	41,992
<b>Average (excluding Eugene)</b>	<b>29,561</b>	<b>86,144</b>	<b>249,096</b>
<b>Eugene Rank (out of 6)</b>	<b>5</b>	<b>5</b>	<b>5</b>

Comparable Facilities in Larger Markets	30-minute	90-minute	180-minute
New York, NY	258,906	889,527	1,494,660
Roxbury Crossing, MA	77,702	323,876	594,143
Seattle, WA	87,481	191,473	254,630
<b>Average</b>	<b>141,363</b>	<b>468,292</b>	<b>781,144</b>

Note: Data sorted by 90-minute drive time.  
Source: Esri, 2016

Exhibits 17 through 20 present key market demographic metrics from markets with comparable aquatic facilities.

**Exhibit 17**  
**Market Population – Aquatic Facilities**

Peer Markets	30-minute	90-minute	180-minute
Geneva, OH	225,513	3,962,083	11,513,430
St. Peters, MO	994,325	2,980,289	6,012,967
Lawrence, KS	185,217	2,736,769	4,815,935
Topeka, KS	210,299	2,486,118	5,438,937
Corvallis, OR	166,143	1,514,916	3,822,815
Eugene, OR	316,224	1,002,100	4,024,008
<b>Average (excluding Eugene)</b>	<b>356,299</b>	<b>2,736,035</b>	<b>6,320,817</b>
<b>Eugene Rank (out of 6)</b>	<b>2</b>	<b>6</b>	<b>5</b>

Comparable Facilities in Larger Markets	30-minute	90-minute	180-minute
Federal Way, WA	1,151,103	4,153,333	7,152,597
Charlotte, NC	1,211,896	3,997,666	12,224,924
Austin, TX	1,339,991	3,911,448	12,188,222
San Antonio, TX	1,746,228	3,209,446	8,569,583
Beaverton, OR	1,207,628	2,886,752	5,207,552
<b>Average</b>	<b>1,331,369</b>	<b>3,631,729</b>	<b>9,068,576</b>

**Exhibit 18**  
**Market Average Household Income – Aquatic Facilities**

Peer Markets	30-minute	90-minute	180-minute
Topeka, KS	\$63,337	\$72,992	\$67,424
St. Peters, MO	\$81,903	\$72,901	\$65,555
Lawrence, KS	\$65,761	\$72,508	\$66,358
Corvallis, OR	\$65,109	\$71,533	\$72,351
Geneva, OH	\$67,081	\$65,880	\$66,579
Eugene, OR	\$59,011	\$61,339	\$71,181
<b>Average (excluding Eugene)</b>	<b>\$68,638</b>	<b>\$71,163</b>	<b>\$67,653</b>
<b>Eugene Rank (out of 6)</b>	<b>6</b>	<b>6</b>	<b>2</b>

Comparable Facilities in Larger Markets	30-minute	90-minute	180-minute
Federal Way, WA	\$73,835	\$88,272	\$82,346
Austin, TX	\$83,233	\$77,561	\$78,552
Beaverton, OR	\$82,168	\$76,199	\$73,214
San Antonio, TX	\$67,563	\$72,013	\$77,904
Charlotte, NC	\$81,009	\$67,608	\$64,246
<b>Average</b>	<b>\$77,562</b>	<b>\$76,331</b>	<b>\$75,252</b>

Note: Data sorted by 90-minute drive time.  
Source: Esri, 2016

**Exhibit 19**  
**Market Median Age – Aquatic Facilities**

Peer Markets	30-minute	90-minute	180-minute
Geneva, OH	42.1	41.7	41.2
St. Peters, MO	38.9	39.1	39.0
Corvallis, OR	33.7	38.2	38.4
Eugene, OR	37.7	38.0	38.8
Lawrence, KS	32.1	36.5	37.1
Topeka, KS	38.8	36.3	36.8
<b>Average (excluding Eugene)</b>	<b>37.1</b>	<b>38.4</b>	<b>38.5</b>
<b>Eugene Rank (out of 6)</b>	<b>3</b>	<b>3</b>	<b>4</b>

Comparable Facilities in Larger Markets	30-minute	90-minute	180-minute
Charlotte, NC	35.4	38.2	38.4
Federal Way, WA	36.2	37.8	38.1
Beaverton, OR	37.4	37.6	38.0
Austin, TX	32.8	34.3	34.2
San Antonio, TX	33.5	34.2	34.1
<b>Average</b>	<b>35</b>	<b>36</b>	<b>37</b>

**Exhibit 20**  
**Market Corporate Base – Aquatic Facilities**

Peer Markets	30-minute	90-minute	180-minute
Geneva, OH	10,045	162,283	470,300
St. Peters, MO	41,691	118,557	252,435
Lawrence, KS	8,228	109,165	203,384
Topeka, KS	8,592	101,085	230,384
Corvallis, OR	7,268	67,891	169,431
Eugene, OR	15,248	42,977	178,862
<b>Average (excluding Eugene)</b>	<b>15,165</b>	<b>111,796</b>	<b>265,187</b>
<b>Eugene Rank (out of 6)</b>	<b>2</b>	<b>6</b>	<b>5</b>

Comparable Facilities in Larger Markets	30-minute	90-minute	180-minute
Federal Way, WA	51,382	190,477	321,832
Charlotte, NC	58,296	162,992	477,545
Austin, TX	57,706	152,842	446,269
Beaverton, OR	61,585	124,376	223,432
San Antonio, TX	60,220	117,248	309,538
<b>Average</b>	<b>57,838</b>	<b>149,587</b>	<b>355,723</b>

Note: Data sorted by 90-minute drive time.  
Source: Esri, 2016

## **APPENDIX F: LIST OF STAKEHOLDERS AND USER GROUPS INTERVIEWED**

## List of Stakeholders and User Groups Interviewed

Name	Organization	Completed Date	Interview Type
Mike Bartlett	3d Lacrosse National	29-Feb	Telephone
Natalie Medina	4J School District	21-Mar	Telephone
Mike Wells	ASA Softball - Oregon	26-Feb	Telephone
John Barofsky	Beppe & Gianni and La Perla	28-Mar	Telephone
Robert Cashell	Cascades Collegiate Conference	21-Mar	Telephone
Matt Peters	City of Eugene Athletics	21-Mar	Telephone
Neil Bjorklund	City of Eugene Parks	25-Jan	In Person
Craig Smith	City of Eugene Parks	25-Jan	In Person
Cody March	Columbia Empire Volleyball Association (CEVA) - Oregon	29-Feb	Telephone
Travis Palmer	Cottage Grove Chamber	29-Feb	Telephone
Renee Grube	Director of Eugene Libraries, Recreation and Cultural Services	25-Jan	In Person
Nancy	Emerald Valley Track Club	4-Apr	Telephone
Larissa Straily	Erb Memorial Union, University of Oregon	25-Jan	In Person
Cathryn Stephens	Eugene Airport	25-Jan	In Person
Rich Fay	Eugene Aquatics	29-Feb	Telephone
Dave Hauser	Eugene Area Chamber of Commerce	25-Jan	In Person
Dale Hartley	Eugene Challengers	22-Feb	Telephone
Greg Evans	Eugene City Council President	25-Jan	In Person
Jon Ruiz	Eugene City Manager	25-Jan	In Person
Lisa Vertulfo	Eugene City Water Polo	4-Apr	Telephone
Alan Benavides	Eugene Emeralds	14-Mar	Telephone
Susan Belanger	Eugene Figure Skating Club	4-Apr	Telephone
Charity Hansen	Eugene Little League	23-May	Telephone
Ray Miller	Eugene Mens Lacrosse	4-Apr	Telephone
Juergen Ruckaberle	Eugene Timbers Football Club	22-Feb	Telephone
Erin Maloney	Eugene Ultimate Group/Summer Solstice Tournament	22-Feb	Telephone
Alan Evans	Evans, Elder, and Brown	29-Feb	Telephone
John Brown	Evans, Elder, and Brown	21-Mar	Telephone
Julie Saul	Hilton Eugene	25-Jan	In Person
Robert Canaga	Interested party	25-Jan	In Person
Bev Smith	Kidsports	25-Jan	In Person
Kara Minchin	Lane Amateur Hockey Assoc	29-Feb	Telephone



## List of Stakeholders and User Groups Interviewed (continued)

Name	Organization	Completed Date	Interview Type
Chris Hawken	Lane Community College	29-Feb	Telephone
Paula Westgate	Lane Community College	25-Jan	In Person
Lisa Benson	Lane Community College	25-Jan	In Person
Steve Mokorhisky	Lane County Administrator	25-Jan	In Person
Sarah Case	Lane County Economic Development	25-Jan	In Person
Mike Russell	Lane County Parks	25-Jan	In Person
Corey Buller	Lane Event Center	25-Jan	In Person
Kia Riley	Little League Baseball Western Region	22-Feb	Telephone
Christine Lundberg	Mayor of City of Springfield	25-Jan	In Person
Tony Staley	National AAU Gymnastics/ AAU Junior Games	4-Apr	Telephone
Velinda Hunter	National Academy of Artistic Gymnastics	29-Feb	Telephone
Cos	Nike Portland Run Club	22-Feb	Telephone
Valerie McCutchan	NIRSA National Flag Football Championships	29-Feb	Telephone
Gord Welbourne	Northern Oregon Cal Ripken Baseball	22-Feb	Telephone
Neil Farrens	NSA Adult Leagues Oregon	21-Feb	Telephone
Marty Lalley	NSA Oregon	7-Mar	Telephone
Fred Banks	Oregon AAU Boy's Basketball and Football	7-Mar	Telephone
Diane Wenger	Oregon AAU Girl's Basketball	29-Feb	Telephone
Chuck Wenger	Oregon AAU Track and Field and AAU Karate	22-Feb	Telephone
Jerry Honl	Oregon AAU Volleyball	22-Feb	Telephone
Nick Larson	Oregon Amateur Basketball	29-Feb	Telephone
Kenji Sugahara	Oregon Bicycling Association	29-Feb	Telephone
Peter Weber	Oregon School Activities Association - Baseball	29-Feb	Telephone
Peter Weber	Oregon School Activities Association - Soccer	22-Feb	Telephone
Brad Garrett	Oregon School Activities Association - Track	22-Feb	Telephone
Brad Garrett	Oregon School Activities Association - Wrestling	22-Feb	Telephone
Brad Garrett	Oregon School Activities Association Wrestling	22-Feb	Telephone
Jody Braden	Oregon Swimming	29-Feb	Telephone
Steve Thorpe	Oregon USA Wrestling	4-Apr	Telephone
John Madding	Oregon Youth Soccer Association	24-Feb	Telephone
Gord Welbourne	Pacific Northwest Babe Ruth League	29-Feb	Telephone
Arthur Herring	Pacific Northwest Masters Basketball	4-Apr	Telephone

## List of Stakeholders and User Groups Interviewed (continued)

Name	Organization	Completed Date	Interview Type
Duke Wang	Pacific Real Estate Services	14-Mar	Telephone
Kristopher Kitz	PeaceHealth	14-Mar	Telephone
Joey Garah	Pelada Football Academy	21-Mar	Telephone
John Prevedello	Prevedello Hettick	29-Feb	Telephone
Brianna Lester	PrimeTime Sports	29-Feb	Telephone
Kevin Reed	Reed Investments	21-Mar	Telephone
Ron Clack	South Oregon Cal Ripken Baseball	22-Feb	Telephone
Vonnie Mikkelsen	Springfield Area Chamber of Commerce	25-Jan	In Person
Gino Grimaldi	Springfield City Manager	25-Jan	In Person
Scott Kerr	Team Eugene Aquatics	7-Mar	Telephone
Mike Morris	Tournament Services Inc.	22-Feb	Telephone
George Classen	Track City Track Club	4-Apr	Telephone
Vin Lannana	TrackTown USA	25-Jan	In Person
Janis Ross	Travel Lane County	25-Jan	In Person
Kari Westlund	Travel Lane County	25-Jan	In Person
Joey Jewell	Travel Lane County	25-Jan	In Person
Tami Brown	TRBO Basketball	23-May	Telephone
John Lovell	U.S. Youth Soccer - Western Region	7-Mar	Telephone
Mike Duncan	UO Athletics	25-Jan	In Person
Brent Harrison	UO Student Rec	29-Feb	Telephone
Stacey Metro	UO Volleyball	29-Feb	Telephone
Chad Williams	US Club Soccer - National	22-Feb	Telephone
Matt Bernard	US Club Soccer - Western Region	22-Feb	Telephone
Mollie Gill	USA Gymnastics Region 2	14-Mar	Telephone
Jerry Westfall	USA Track and Field Oregon	4-Apr	Telephone
Matthew Warren	USTA Pacific NW	29-Feb	Telephone
Cheryl Martin	Valley River Inn	25-Jan	In Person
Roger Schaljo	Western Oregon Hop Valley Pickleball Championships	29-Feb	Telephone
Bob Keefer	Willamalane Parks and Recreation District	25-Jan	In Person
Todd Wagner	Willamette Valley Youth Baseball	22-Feb	Telephone
Daniel Blough	Willamette Valley Youth Football and Cheer	23-May	Telephone
Dave Perez	YMCA	25-Jan	In Person
Natalie Shelton	Youth Basketball of America	7-Mar	Telephone
Jim Torrey	Youth sports advocate	25-Jan	In Person