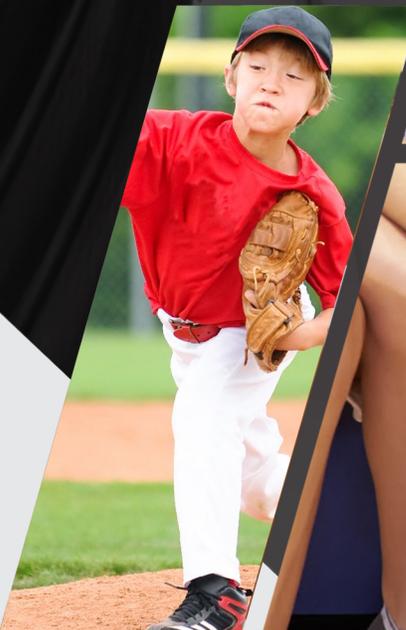


SPRINGFIELD EXPO SPORTS COMPLEX | SPRINGFIELD, MO

Market Opportunity Report

JUNE 2021



PREPARED FOR:

Greater Springfield Area Sports Commission

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EXECUTIVE SUMMARY

In March of 2021, the Greater Springfield Area Sports Commission (henceforth, the “Client”) engaged Sports Facilities Advisory, LLC (SFA) to complete a market opportunity report related to the development of new sports tourism assets in the Springfield, MO area. The Client’s primary intent is to develop facilities capable of accommodating sports tourism events that drive economic impact, overnight stays, and direct spending generally, but especially in seasons outside of their traditional tourism windows.

In order to understand the desired outcomes for the project, SFA facilitated an exercise to define success for the project. Based on that exercise, SFA created those desired outcomes as the “definitions of success.” As such, this project must meet the following criteria to be deemed successful:

- Develop an impactful sports complex that serves as an economic impact driver in the Springfield area through the hosting of regional tournaments and sports tourism events and attracting, as well as retaining, high-quality tournaments and events.
- Improve access to local recreational spaces in order to meet demand while enhancing the local quality of life and providing sports and recreation assets where they do not presently exist.
- Become a tournament and event destination facility that attracts non-local visitors to Springfield and drives economic impact and hotel room nights.
- Stimulate local marketing and tourism by introducing new and redeveloping existing quality sports facilities that will diversify the existing Springfield tourism asset base.
- Reconfigure the existing Springfield Expo Center into a sport and event facility that will significantly out-perform its current configuration as an exhibit hall in both room-night generation and overall economic impact.

It should be noted that the Expo Center has an ongoing management agreement with the current operator of the facility. In order for the project to be successful, SFA recommends reviewing and amending or canceling that management agreement to ensure that the operator of the facility has the experience and systems necessary to attract, host, and retain tournament and events rights holders.

In today’s highly competitive sports tourism landscape, most successful youth and amateur sports tournament venues have a specialized management team with industry-specific experience and a proven track record of booking, hosting, and retaining tournaments.

Management experience impacts booking because the event sales aspect of the sports tourism industry is highly relationship driven; established rights holders must have confidence in the facility and its management team in order to create a new event or move an existing event to a new location. Management experience impacts hosting and retaining events because the requirements of each sport and each organization is different and every event day is unique; a management team that has navigated the distinct challenges of a wide variety of youth and amateur sports tournaments is critical to ensuring the satisfaction of rights holders, athletes, spectators, coaches, and referees. As such, SFC strongly recommends that the Springfield Expo Sports Complex hires a proven sports tourism management team or outsources management to a top-tier operator.

Facility Development and Cost

SFA created a facility program and opinion of cost for the development of new sports tourism-focused facilities based on research, analysis, knowledge of the local and regional markets, and the Client's vision for the new facilities as communicated to SFA during the development planning session.

SFA created a facility program and opinion of cost for an existing facility and development of a new facility.

Existing Facility Development and Cost

The indoor facility program consists of an approximately 197,000 square foot indoor building, which is the redeveloped existing Springfield Expo Center and West Mezzanine. This space estimate includes the lobby area, storage spaces, and facility staff offices. The indoor facility program consists of six basketball courts and six volleyball courts (cross-lined over the basketball courts). The facility program options are detailed later in this report and feature the following spaces:

- Indoor Sports Facility – Existing Expo Center
 - 6 Basketball Courts
 - 6 volleyball courts (cross-lined over the basketball courts)
 - 18 pickleball courts (lined over basketball courts)
- Indoor Sports Facility - West Mezzanine
 - Office Space
 - Tenant Space
 - Family Entertainment Center with Competition-Level Esports Venue

Based on the information available and reflective of SFA's experience in redeveloping existing assets for sports, events, and entertainment, SFA has provided an opinion of cost of approximately \$10.4 million dollars for the existing facility to become a turn-key operating sports complex. This cost estimate includes all reasonable costs associated with facility development including construction updates/refurbishing, furniture, fixtures, and equipment costs, and more. This preliminary opinion of cost estimate also includes the development of leased space allocated for a potential tenant or tenants. The revenue generated from this space can contribute to offsetting the redevelopment costs and provide valuable adjacencies in facility operation. An example of a valuable facility adjacency includes leasing the space to a physical therapist or sports medicine specialist.

New Facility Development and Cost

SFA also created a facility program and opinion of cost for the development of a new sports tourism focused facility based on research, analysis, knowledge of the local and regional markets, and the Client's vision for the new facilities as communicated to SFA during the development planning session.

The indoor facility program consists of an approximately 58,000 square foot indoor building on 1.5 total acres, including setbacks and green space. The indoor facility program consists of four basketball courts and eight volleyball courts (cross-lined over the basketball courts). The facility program options are detailed later in this report and feature the following spaces:

- Indoor Sports Facility
 - 4 Basketball Courts
 - 8 volleyball courts (cross-lined over the basketball courts)
 - 16 pickleball courts (lined over basketball courts)

- Associated Parking, Setbacks, and Green Space (the estimated parking allotment required to meet the projected needs of the facility, not considering existing parking opportunities)

Based on the SFA's experience in developing new sports and events assets, SFA has provided an opinion of cost of approximately \$10.8 million dollars for the new facility.

As a combined total, SFA's opinion of cost for both venues is \$21.2 million. It should be noted that no new parking has been included based on the parking that already exists near the Expo Center.

It is important to recognize the expected construction cost efficiency of retrofitting the existing Expo Center for use as a sports facility as opposed to building an entirely new facility in its place. As a basic overview, there are two scenarios to consider:

- Scenario 1: build a new 6-court sports facility with basic non-sport event capabilities, a family entertainment center, and recommended administrative and service spaces. In this case, SFA would expect the building to be at least 105,000 SF and cost at least \$210 per square foot. At that minimum size and cost per square foot, a new building would cost at least \$21.2 million to build as opposed to the \$10.4 million cost of retrofitting the Expo Center.
 - Note, SFA's projected construction cost for the recommended new building is lower per square foot than the \$210 used in the scenario above because the recommended new building does not have basic event capabilities or the family entertainment center component, which are both more expensive to build than a basic sports facility.
- Scenario 2: build a new sports-capable Expo Center at the same size as the existing Expo Center, which is 197,000 square feet. In this case, SFA would expect the building to cost at least \$275 per square foot, which equates to at least \$54.2 million to build as opposed to the \$10.4 million cost of retrofitting the Expo Center.

Both scenarios ignore the cost of demolition and the interruption of service, which would add an untold opportunity cost to the equation. In either scenario, the option to retrofit the Expo Center is clearly more efficient than all new construction.

The total redevelopment of the existing facility combined with the development of a new, adjoined facility would cost approximately \$21.2 million.

Details related to the facility program options and opinion of cost can be found in the "Facility Program & Opinion of Cost" section of this report, as well as the separately delivered Facility Program and Opinion of Cost document.

Combined Venue Features and Opportunity

As a combined venue, the location would have more than 78,000 square feet of event floor space capable of being used as 10 basketball courts, 14 volleyball courts, and 30 pickleball courts. It would also have the capability of hosting major regional sports and non-sports events. With the inclusion of the family entertainment center, multiple meeting rooms, several concession stands, and other amenities to support events, this facility would be capable of being a premier destination in the region and a significant driver of tourism throughout the year.

Recommendations for Next Steps

Based on the work completed to date, SFA believes that an opportunity exists to develop a regional sports and events destination drive in Springfield, MO with the capability of meeting the Client's objectives.

A full assessment of financial/operational feasibility will require the development of a detailed financial forecast and economic impact analysis, which has been outlined as the next phase of work for the project.

If the Client chooses to move forward with Phase II, SFA recommends the:

- Completion of a detailed financial forecast (pro forma).
 - The financial model will help to understand the operational realities of the recommendations and what amenities will best contribute to the definitions of success of the Client.
- Development of an economic impact analysis based on the operational forecast.
 - The economic impact analysis will project the non-local visitation, room-night generation, and direct spending as a result of tournaments and events hosted through the facility assets which would benefit the surrounding Springfield community.
- Exploration of potential for funding mechanisms, development incentives, and/or strategic partnerships that could create a viable investment into the enhancement of existing facilities and construction and operation of a new facility.
 - The exploration of funding mechanisms, development incentives, and strategic partnerships will assist in answering questions such as how the facility will be utilized, if it makes more sense to enhance existing facilities or develop new facilities, and how the Client will fund the project.
- Creation of an optimized facility program and business model(s).
- Completion of a narrative document summarizing the optimized facility program and business model, financial forecast, and economic impact analysis.

In conclusion, SFA believes that there is an opportunity to develop new sports tourism facility assets and redevelop existing assets in order to achieve the Client's goals. SFA has recommended the existing facility upgrades and provided facility program spaces for new facilities with the highest likelihood of success based on the work completed to date.

INTRODUCTION

In March of 2021, the Greater Springfield Area Sports Commission (henceforth, the “Client”) engaged Sports Facilities Advisory, LLC (SFA) to complete a market opportunity report related to the development of new and redevelopment of existing sports tourism assets in the Springfield, MO area. The Client’s primary intent is to develop sports tourism facilities capable of operating as economic impact drivers in Springfield.

Scope of Work

The full scope outlined in the agreement consists of the following four (4) steps in Phase 1 – Market Opportunity Analysis:

- Step 1: Project Kick-Off Call
 - In this step, SFA facilitated an initial phone call to cover six topics that allow the SFA Team to begin its work. Those topics are:
 - Introductions
 - Project History
 - Existing Data
 - Potential Partners and Stakeholders
 - Key Dates for the Project
 - Other Questions & Answers
- Step 2: Existing Data Review and Market Analysis
 - SFA discussed the current facilities used for local programming and sports tourism in the Springfield area with the Client. SFA then conducted market research on various local sports and recreation assets, as well as sports tourism asset types in the region.
- Step 3: Onsite Development Planning Session (DPS)
 - SFA facilitated a “deep dive” planning and strategy session with the Client that focused on defining success and refining the Client’s vision, value propositions, financial resources, core competencies, products and services, strategic alliances, and financial success metrics.
- Step 4: Market Opportunity and Recommended Facility Report
 - To finalize Phase I of the Client’s engagement with SFA, SFA prepared the Market Opportunity Report that outlines the Client’s opportunity based on SFA’s expertise and experience in the industry. The report features ten substantive sections, including:
 1. Site and Market Overview
 2. Key Data: Demographic and Socioeconomic Analysis
 3. Key Data: Sports in the Region
 4. Key Data: Existing Regional Service Providers
 5. Key Data: Sports Tourism Industry Insights
 6. Business Model Overview
 7. Facility Overview – Facility Program(s) and Opinion of Cost
 8. Example Facility Performance Benchmarks
 9. Potential Funding Sources
 10. Conclusion and Next Steps

Definitions of Success

In order to understand the desired outcomes for the project, SFA facilitated an exercise to define success for the project. Based on that exercise, SFA created those desired outcomes as the “definitions of success.” As such, this project must meet the following criteria to be deemed successful:

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This document summarizes the work completed to date and outlines SFA’s recommendations for next steps.

ABOUT SF COMPANIES

The Sports Facilities Companies (SF Companies) is made up of three entities that represent industry leading services throughout the full development cycle of youth and amateur sports, recreation, event, wellness, and entertainment facilities. The expertise assembled as part of the SF Companies is unparalleled in the ability to lead projects through every phase of the development cycle including planning, funding, development, and operations.

Sports Facilities Advisory (SFA) is a consulting firm specializing in planning and funding support services for youth and amateur sports, recreation, event, wellness, and entertainment facilities of all sizes and scope. SFA guides and accelerates planning by offering market research driven program planning, proven financial and economic impact forecasting, community impact calculators, and advisory services for public-private partnerships and other funding partners. SFA and its partners selectively invest in associated real estate such as hotels, retail, medical office, and other developments providing unique economic impact opportunities that can simplify financing.

Sports Facilities Development (SFD) produces on time and on budget developments that take advantage of SFD's formal and transparent request for proposal (RFP) and vendor selection process, purchasing power, and project managers with direct experience in the development of youth and amateur sports, recreation, wellness, event, and entertainment venues. SFD's project oversight and leadership produces better outcomes at lower cost.

Sports Facilities Management (SFM) is an operations company delivering operational, financial, community, and economic impact results through more than 25 million visits annually in the venues that are part of the SFM Network (www.SFMNetwork.com). Its employees and clients have made SFM the go to resource for municipalities seeking to expand recreation offerings while also attracting events.

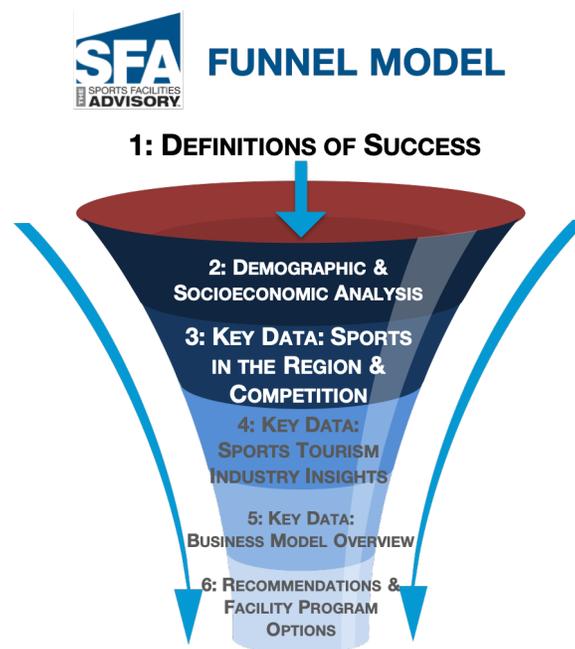
Together, the SF Companies are the United States' leading youth and amateur sports, recreation, wellness, event, and entertainment planning, funding, opening, and management organizations. As a result, The SF Companies have been named the only sports-related strategic partner to the International City Managers Association (ICMA), and SF Companies are regularly engaged to assist sports tourism destinations, private developers, parks and recreation departments, national/state/local government entities, universities and educational institutions, non-profit organizations, and architecture and engineering firms across the U.S. and worldwide.

PROCESS AND WORK COMPLETED

Outline of Process Used to Form Recommendations

In order to create the recommendations detailed in this report, SFA utilized a proven process to develop an in-depth understanding of goals, opportunities, and viable strategies for improving Springfield’s access to quality youth sport and recreation facilities and enhance the local youth and amateur sports tourism position. While the process included dozens of steps and was not truly linear, it can be summarized as a six-phase process that begins with developing a contextual understanding of desired outcomes and ends with recommendations to achieve those outcomes.

The “SFA Funnel Model” depicted below demonstrates SFA’s process to develop and refine recommendations for Springfield.



To add context to the SFA Funnel Model, the following descriptions explain each phase.

- **Phase 1: Define Success:** as outlined in the “Introduction” section, SFA facilitated dialogue with the Client to identify desired outcomes through the in-market Development Planning Session and associated meetings.
- **Phase 2: Demographic and Socioeconomic Analysis:** as outlined in the “Key Data: Demographic and Socioeconomic Analysis” section, SFA analyzed local and regional demographic and socioeconomic data to understand the current market in the Springfield area.
- **Phase 3: Analyze Sports in the Region and Regional Service Providers:** as outlined in the “Key Data: Sports in the Region” section, SFA analyzed local and regional sport participation trends to determine core user groups and better understand the market for potential facility users in the Springfield area and the overall region. Additionally, as outlined in the “Key Data: Existing Service Providers” section, SFA analyzed existing

service providers in the local market, as well as the region, that provide similar facility offerings to potential future sports tourism offerings in Springfield, MO.

- Phase 4: Provide Sports Tourism Industry Insights: as outlined in the “Key Data: Sports Tourism Industry Insights” section, SFA presented a review of the current state of sports tourism in the United States and provided relevant data to better understand industry growth, projections, and factors to consider for future facility development and existing facility redevelopment.
- Phase 5: Provide Business Model Overview: as outlined in the “Business Model Overview” section, SFA presented a review of the potential sports and programs that a new youth and amateur sport and recreation facility in Springfield, MO could offer to regular and seasonal customers. This section incorporates two distinct approaches for facility programming, including both local and sports tourism operating models.
- Phase 6: Develop Recommendations and Present Facility Program(s): as outlined later in this report, SFA developed recommendations for:
 - Developing New Youth and Amateur Sport and Recreation Facilities
 - Included Development and Construction Cost Estimates
 - Referenced Example Performance Benchmarks

Outline of Work Performed

In order to complete its work, SFA performed the following steps:

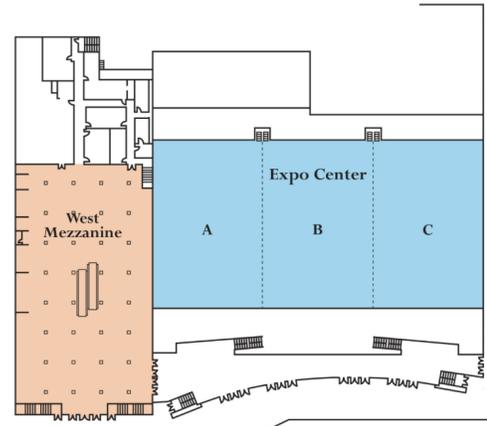
- Reviewed existing data, including:
 - Site and Land Maps
 - Facility (Expo Center and Former Sears Building) Floorplans
 - Parking Structure Plans
 - Springfield Sports Commission
 - Sports Tourism Strategic Planning Project
 - Indoor Sports Facility Report
 - Springfield CVB Quarterly Reports
 - Smith Travel Research Report
 - Non-Expo Center Event Reports
 - Lodging Tax Recipients Breakdown
 - Expo Center Event Schedule
 - Expo Center Event Report
 - And more
- Conducted a market analysis, including:
 - Demographics and Socioeconomics
 - Sports Participation
 - Sports Tourism Industry, Participation, and Competition Trends
- Researched existing local recreation assets and regional tournament destinations, including:
 - Facility Amenities
 - Facility Quality
 - Event Seasonality
 - Esports Potential
 - And More
- Researched existing sports tourism events, including:
 - Location

- Length
- Number of teams
- Pricing
- And more
- Created a facility program plan and opinion of cost for the development of new facilities
- Identified preliminary funding sources that should be considered in determining the opportunities to invest in new youth and amateur sport facilities

SITE AND MARKET OVERVIEW

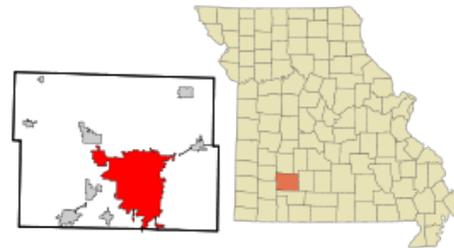
Existing Facility Overview

The Springfield Expo Center is made up of approximately 45,000 square feet of event floor space in the Springfield Expo Center, approximately 26,000 square feet on the first floor of the former Sears Building, and 26,000 square feet of space in the West Mezzanine that could be redeveloped for a new indoor sport and event complex. The Project Team has discussed the potential for the additional indoor sport and event building to operate adjoining the existing structures. SFA has reviewed the potential for a sports facility based on both the opportunities in and constraints on the existing structures. Additionally, SFA has developed a facility program model for a new adjoining building based on the market opportunity and SFA’s industry experience with sports tourism facilities in the region and across the United States.



Market Overview

Springfield is the third largest city in the state of Missouri, positioned as the county seat of Greene County. The City had an estimated population of 167,882 people, according to census estimates from 2019. With a total land area of approximately 82.39 square miles, Springfield has a population density of approximately 2,037 people per square mile.



Springfield is accessible by Interstate 44 connecting the city to Joplin and Tulsa to the west and St. Louis to the east. Springfield Branson National Airport accommodates direct flights to 15 cities around the United States and has served more than 1 million passengers annually over the last two years.

The Springfield area benefits from Mercy Health System, CoxHealth, Wal-Mart, Springfield Public Schools, Missouri State University, as well as Bass Pro Shops/Tracker Marine as some of the largest employers in the marketplace. Springfield Public Schools enrolled more than 24,000 students in 2020 between a total of 50 public K-12 schools, operating as the largest school district in the state of Missouri. Furthermore, John Deere Reman recently announced the expansion of their Springfield operations to add 130 new jobs to the local workforce. The existing relationships with nationally-recognized brands and organizations can spur facility success and help create a unique, memorable guest experience at a future facility in Springfield.

KEY DATA: DEMOGRAPHIC & SOCIOECONOMIC ANALYSIS

SFA conducted an in-depth demographic and socioeconomic analysis of the local, sub-regional, and regional market. The goal of this portion of the analysis is to determine the key characteristics of the most regular users of new facilities and existing facilities during non-tournament and event times. SFA also determined the characteristics of those users who would participate in tournaments and events in Springfield, MO. SFA has included comprehensive local and regional demographic reports in the Appendix of this document.

The chart below displays some of the key demographic factors used in analyzing the utilization of facilities by the local and sub-regional population; these customers will be the most frequent users of a sports and recreation facility during non-tournament and event times. While these statistics do not serve as strict predictors of a facility’s opportunity to meet its objectives, SFA has developed a proprietary analytical process which considers these factors and several others as an integral part of the financial forecast, sports participation projections, and other analyses required in SFA’s study.

Key Local and Sub-Regional Demographic Factors						
Category	10 Minutes (Local)	15 Minutes (Local)	30 Minutes (Local)	60 Minutes (Sub-Regional)	90 Minutes (Sub-Regional)	240 Minutes (Regional)
Total Population	111,913	196,451	381,164	655,782	1,104,544	11,872,180
Projected 5-Year Population Growth	+3.45%	+3.6%	+4.75%	+3.9%	+2.8%	+2.5%
Median Age	32.7	36.0	37.6	39.1	39.3	38.8
Median Household Income	\$30,378	\$37,522	\$47,090	\$45,361	\$44,845	\$54,672
Fees for Recreational Lessons	\$56.34	\$75.77	\$95.34	\$84.64	\$80.57	\$110.18

Source: ESRI ArcGIS

Demographic and Socioeconomic Insights

The following insights add context to the data below and are based on SFA’s experience in the planning, opening, and management of successful sports and recreation facilities.

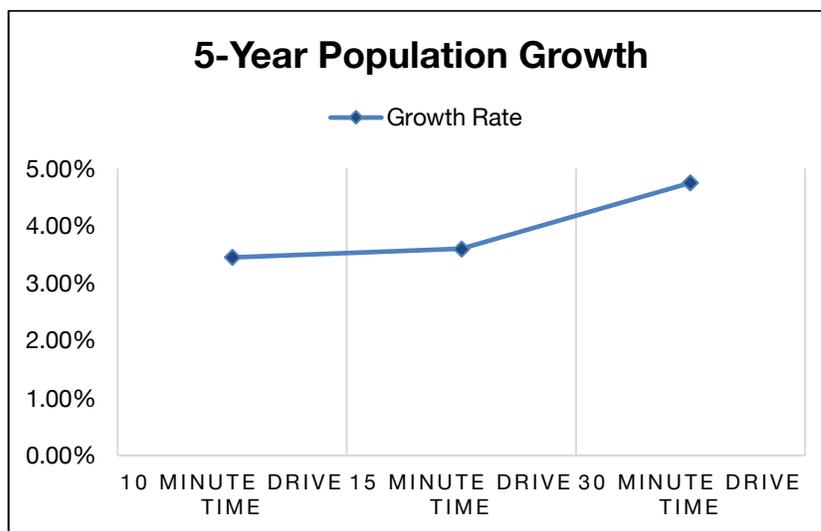
It should be noted that the local demographic and socioeconomic indicators are skewed by the presence and size of Missouri State University; while there is no way to adjust the data, SFA has vast experience working in communities with colleges and universities, and as such has

developed a back-end analytical adjustment to account for the influence of college students on several key demographic and socioeconomic factors (most notably those related to age and income).

- Population Size:** SFA uses drive times from the potential facility site to analyze the population of the possible participants that a sports complex would seek to capture. The immediate area of Springfield, within the 15-minute drive-time window, is made up of approximately 196,451 people, while the overall region (240 minutes) is made up of approximately 11.9 million people.

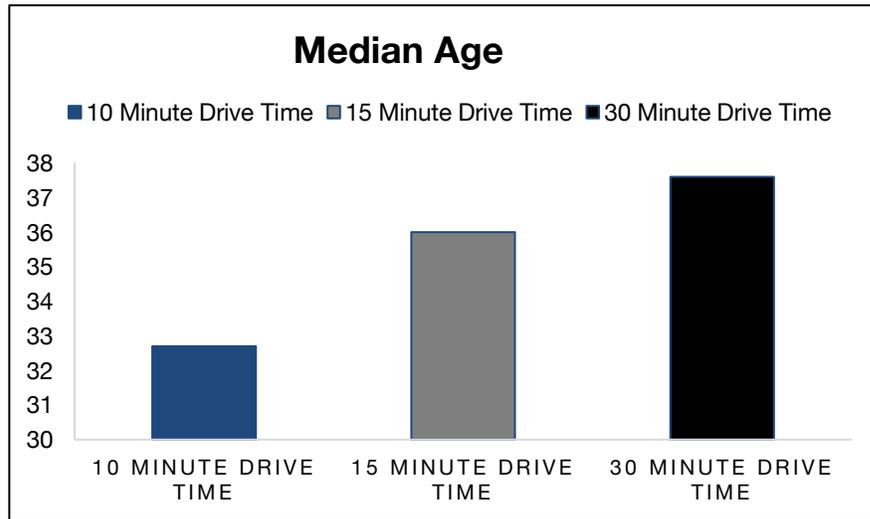
The local market can be viewed as a positive factor for local programming, since the assets are right sized to meet local utilization needs. SFA understands one of the goals for this project is to develop a court complex capable of hosting sports tourism tournaments and events that attract out of market visitors to stay and spend in market. As such, SFA views the regional population size as a positive factor in determining the market opportunity related to sports tourism.

- Population Growth:** The population is expected to increase in the immediate area until at least the year 2022, with estimates up to an approximate 4.75 percent increase per year in the 30-minute drive time interval.



With all five-year population growth projections increasing, SFA views the expected population growth as a positive factor for the market opportunity.

- Age:** The median age within all local drive time intervals is below than the national median of approximately 38.5. Based on SFA’s experience, this is largely influenced by college students, and SFA’s full analysis of the population accounts for this outlying median age.



- Median Household Income:** The median household income levels in all drive time intervals are below the national median, which is approximately \$60,500. SFA adjusted the median household income figures according to the cost of living in Springfield. These adjustments demonstrate that the median household income in Springfield is between five and 39 percent lower than the U.S. median. As with median age, this is largely influenced by the number of college students in the market and that factor has been adjusted in SFA’s back-end analytical system.
- Fees for Recreational Lessons:** The surrounding communities have below average spending on recreational lessons when compared to the national average, which is approximately \$143. Once more, this is largely influenced by the number of college students in the market and that factor has been adjusted in SFA’s back-end analytical system.

A full demographic report can be found in the appendix at the end of this document. The report includes additional demographic and socioeconomic factors that influence participation and contains the data for the critical drive time radii of 10, 15, 30, 60, 90, and 240 minutes. Additionally, SFA has provided maps showing the distribution of population density and median household income in relation to the potential site in Springfield, MO.

KEY DATA: SPORTS IN THE REGION

Potential Sports Participants

As part of the process of analyzing the opportunity for the development in Springfield, SFA determined the total number of sports participants in the local, sub-regional, and regional markets.

SFA calculates sports participation using a blend of national and regional sports participation rates as reported by the National Sporting Goods Association (NSGA) and the Sports and Fitness Industry Association (SFIA). The projections consider only active sports participants who play their respective sport in an organized format a specific number of times per year. The qualifying participation threshold varies by sport and is intended to separate casual participants from core participants; core participants are more likely to be customers at the facility because they play consistently enough to consider paying for and participating in an organized program on a regular basis.

The following table lists the “primary” sports and activities that could be accommodated within the facility types that most regularly drive a high volume and frequency of sports tourism participants and events and the number of potential participants that could be attracted from the local, sub-regional, and regional marketplaces. “Primary” sports are those identified as having regular competitive seasons or a large base of participants to draw from the market.

Potential Sports Participants				
Sport/Activity	Participation Rate	Local (30 min.) Participants	Sub-Regional (60 min.) Participants	Regional (240 min.) Participants
Basketball	6.58%	25,093	43,172	781,573
Volleyball	2.44%	9,287	15,979	289,274
Gymnastics	1.34%	5,102	8,778	158,913
Martial Arts	1.27%	4,856	8,354	151,239
Cheerleading	1.06%	4,036	6,944	125,712
Futsal	0.92%	3,513	6,044	109,422
Wrestling	0.88%	3,353	5,769	104,434
Pickleball	0.52%	1,975	3,398	61,518

Source: SFA, National Sporting Goods Association, Sports & Fitness Industry Association

Potential participants are calculated by multiplying each primary sport’s participation rate with each drive time population. It should be noted that this calculation does not factor in existing service providers, but the influence of competition is also part of SFA’s analysis.

As a preliminary step in determining the market opportunity for certain sports and recreation services, SFA groups participation rates and potential participants in the region by asset type. As shown in the charts below, there is a sizable base of potential participants that new indoor court assets could capture.

Court Sports	Core Participant %	Participants (30 Minutes)	Participants (60 Minutes)	Participants (90 Minutes)	Participants (240 minutes)
Basketball	6.58%	25,093	43,172	72,715	781,573
Volleyball	2.44%	9,287	15,979	26,913	289,274
Gymnastics	1.34%	5,102	8,778	14,785	158,913
Martial Arts	1.27%	4,856	8,354	14,071	151,239
Cheerleading	1.06%	4,036	6,944	11,696	125,712
Futsal	0.92%	3,513	6,044	10,180	109,422
Wrestling	0.88%	3,353	5,769	9,716	104,434
Pickleball	0.52%	1,975	3,398	5,723	61,518
TOTAL	15.01%	57,215	98,437	165,799	1,782,085

Grouping court sports together, new court-based assets in Springfield could serve approximately 15.01 percent of the regional population totaling over 1.7 million players of various sports including basketball, volleyball, and gymnastics.

The sports listed above could compose the most regular programming of a new sports tourism complex containing court assets in Springfield. It is important to note that SFA has not accounted for existing facilities, and a new facility with these assets would directly or indirectly compete with those facilities, depending on the quality, size, management, and other features of the competing facilities.

KEY DATA: EXISTING SERVICE PROVIDERS

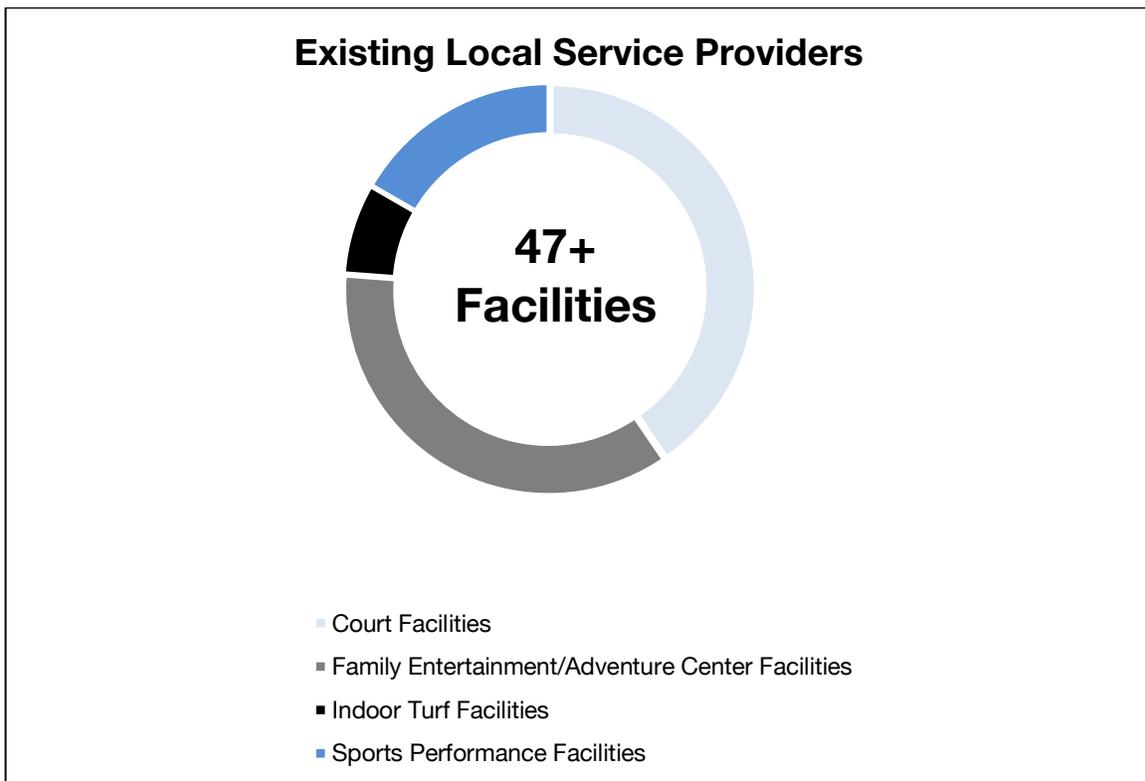
Based on the desire of the Client to develop sports and recreation assets that serve as accessible, year-round sports and recreation spaces while also providing an attraction for visitors, the following asset types are being considered as having the potential to meet the definitions of success in Springfield:

- Indoor Court Facilities
- Indoor Turf Facilities
- Family Entertainment Center/Adventure Facilities
- Sports Performance Facilities

Existing Local Competition

SFA researched and analyzed existing facilities locally and regionally that could impact a new sports complex in Springfield. The facilities researched include local and regional service providers that offer similar facilities and program offerings, though not all competitors have an equal influence on the opportunity.

The chart below shows the existing service providers within the local market (approximately 60-minute drive time) to Springfield researched and analyzed by SFA.



The tables on the following page show a sampling of the indoor court, indoor turf, family entertainment center facilities, and sports performance facilities analyzed by SFA. SFA presented these facilities in order of proximity rather than similarity to the Springfield project. An expanded list of facilities in the local market analyzed by SFA has been included in the Appendix.

Indoor Court Facilities	Drive time (minutes)
John Q. Hammons Student Center	3
JQH Arena	3
Drury University Facilities – Barber Fitness Center	3
Bill R. Foster and Family Recreation Center	4
O'Reilly-Tefft Gymnasium	5
The Club House - Apex Volleyball Club	5
Evangel University – Mabee Fitness Center	7
The FieldHouse	16

Indoor Turf Facilities	Drive time (minutes)
Lake Country Youth Soccer	6
Marucci Clubhouse Midwest	20
CY Indoor Sports Center	21

Family Entertainment Center Facilities	Drive time (minutes)
Craft Axe Throwing	3
Contender eSports	3
Springfield's Incredible Pizza Company	10
Sunshine Lanes	10
Enterprise Park Lanes	10
Andy B's Bowling - Springfield	11
Getaway Golf	13

Sports Performance Facilities	Drive time (minutes)
Big Time Results	9
Training Day Sports	14
GP Athletics	15
Carr PT and Sports Performance	15
Redline Athletics	18

Although SFA has not been engaged for a financial forecast, it is important to note that SFA conducts additional analyses during the pro forma development to determine each competing facility’s effect on the ability of new youth and amateur sport assets to achieve operational success. The facilities researched represent potential competitors in the market that are currently hosting programs, tournaments, or other events that may impact the operations at a new facility.

The factors SFA will use to perform this analysis include, but are not limited to:

- Existing sports and recreation inventory:

- SFA analyzes existing facility inventory in terms of the quantity of existing sports assets, the quality of those assets, and their proximity to critical supporting structures and businesses.
- Proximity to the facility:
 - SFA determines the proximity of existing sports and recreation assets to the new facility, recognizing that closer assets will have a larger impact from a competitive standpoint than assets that are farther away.
- Pricing:
 - SFA examines the market prices of user fees, rental rates, registration fees, etc. Unless otherwise directed, SFA sets prices in its financial forecast that are either in line with or slightly above current-year market rates.
- Seasonality:
 - SFA utilizes its experience in managing similar facilities to determine the optimized seasonality for hosting programs and events.
- Marketing reach and capture rate:
 - SFA bases the ability of a new facility to effectively market and capture sports and recreation participants, tournaments, and events on market factors such as demographics and socioeconomics, competitive factors such as the quality of existing facilities in the region, and destination factors such as site accessibility and the reputation of the destination.
- Program mix and service offerings:
 - SFA creates a financial forecast that reflects a robust, detailed set of revenue streams for the facility based on the type, size, quantity, and quality of assets.

Regional Competitors

As described in the “Process and Work Completed” section, SFA analyzed regional facilities to determine size, quality, events hosted, and several other factors to understand opportunities for and obstacles to new facility development.

The table below displays a sample of tournament-capable facilities within a three-hour drive time of Springfield, their location, and the number of courts each facility offers. As defined previously, SFA concentrated on one area of focus: indoor court facilities. SFA analyzed a combined 16 regional facilities.



The charts below display a sample of the tournament capable complexes in the region. SFA has also included a comprehensive list of tournament facilities within the appendix.

Regional Indoor Court Facility Competitors

Sample of Regional Court Facilities		
Facility	City	Amenities
Elite Sports Center - Lenexa	Lenexa, KS	4 futsal courts
Drive5 Sports Center	Overland Park, KS	3 basketball courts
Mid-American West Sports Complex (Okun Fieldhouse)	Shawnee, KS	4 basketball, 8 volleyball courts
Columbia Sports Fieldhouse	Columbia, MO	4 basketball courts/5 volleyball courts with various spectator bleachers and meeting rooms
Homefield Olathe	Olathe, KS	10 multi-sport flex courts
AAO P. Whitaker Sports Center	Fayetteville, AR	2 basketball courts/4 volleyball courts

KEY DATA: SPORTS & EVENTS TOURISM INDUSTRY INSIGHTS

Based on the desire of the Client to develop court assets that drive non-local visitation to the community through sports tourism in order to generate economic impact that benefits the community, SFA has provided insights related to the sports tourism industry. As a focus of potential sports tourism court assets in Springfield, MO, sports tourism could help drive economic impact and non-local spending in the market, benefitting the entire community, including those who may never utilize the facility itself.

General Overview

According to survey data collected by the Sports Events & Tourism Association (Sports ETA) published in its most recent “State of the Industry Report” in September of 2020, the sports tourism industry continues to grow and be an impactful part of life in the United States:

- In 2019 nearly 180 million people traveled to a sports tournament or event.
- In 2019 there was an estimated 69 million room nights generated by travel for sports related tournaments and events.
- In 2019 there was approximately \$45.1 billion spent on travel for sports related tournaments and events.
 - \$12.5 billion was spent on transportation.
 - \$9.2 billion was spent on lodging and accommodations.
 - \$8.6 billion was spent on food, beverage, and dining.
 - \$5.7 billion was spent on entertainment.
 - \$5.1 billion was spent on retail.
 - \$3.9 billion was spent on tournament operations.
- For the past five years spending related to travel for sports tournaments and events has increased by 16.7%.
- In 2019 spending related to travel sports tournaments and events resulted in approximately \$14.6 billion in tax revenue generation.

Industry Growth

The sustained growth in the youth and amateur sports tourism industry over the last 10+ years is one of the most compelling reasons to consider sports tourism as a reliable, attractive industry. In fact, sports tourism is the only segment of the tourism industry that did not decline in any quarter of the Great Recession, allowing it to be considered “recession resistant” and therefore of increased interest to communities across the country.

COVID-19 Response and Industry Impact Statement

The COVID-19 pandemic interrupted sports and recreation activities beginning in March 2020 and had an unprecedented impact on the industry. With the implementation of nationwide quarantine policies, sports-related businesses had mandated closures across the United States. The Sports Facilities Management (SFM) manages venues in 16 different states, and all of the facilities in the SFM portfolio closed at some point in 2020. At the time this report was written, SFM-managed facilities in 12 states were fully open, facilities in three states were partially open, and facilities in one state were not open.

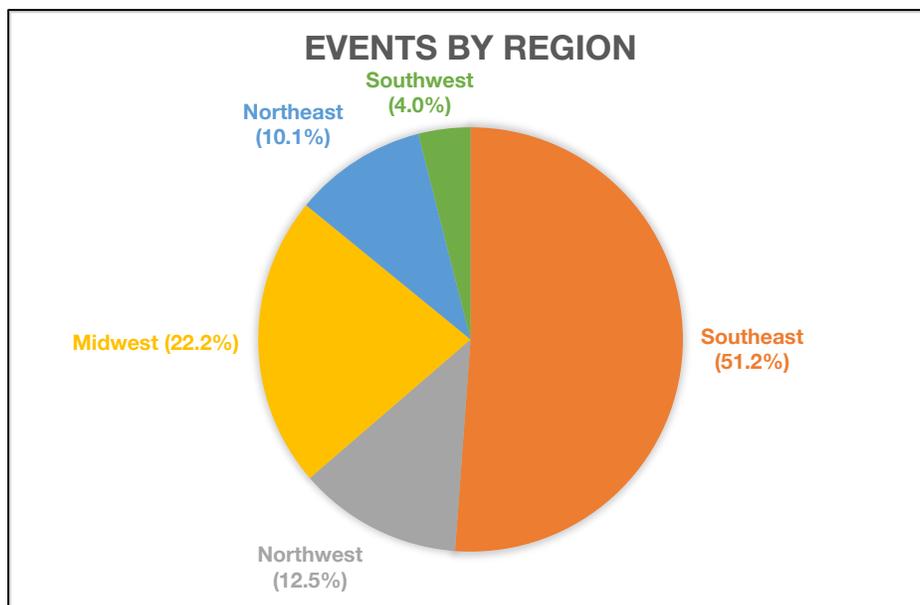
That said, there are three reasons that The Sports Facilities Companies (SFC) is optimistic about the sports and recreation industry in 2021 and beyond, despite the COVID-19 pandemic:

1. SFM developed standard operating procedures that have proven to be highly effective in mitigating risks related to COVID-19:
 - o SFM-managed facilities have hosted more than 1 million visitors since reopening began in May. In total, SFM had 22 positive cases reported to our venues.
 - 13 were SFM staff/team members, 4 were parents/coaches/officials, 5 were youth participants.
 - 0 cases have been transmitted because of contact in our venues.
 - o Since SFM-managed facilities began reopening in May, SFM has hosted more than 300 events that have generated more than \$60 million in economic impact.
 - o Of all of the events that were cancelled during mandated closures, more than 50 percent were rescheduled (i.e., they were not cancelled, they simply moved dates).
2. Sports tourism has proven to be recession resistant in the past.
 - o During the Great Recession, sports tourism was the only segment of the tourism industry that did not decline in two consecutive quarters.
 - o Since the Great Recession, economic impact and sports travel spending has grown every year.
 - o Sports tourism is now a \$45+ billion industry annually.
3. Team sports participation rates were on the rise prior to the COVID-19 interruption.
 - o In 2019, team sports participation rates in the United States increased for the first time in several years.
 - o The rate of inactivity in children age 5-18 was lower in 2019 than in any year since 2013.
 - o Registration rates at SFM-managed facilities suggest that the 2018 to 2019 upward trend will continue after the pandemic is controlled.

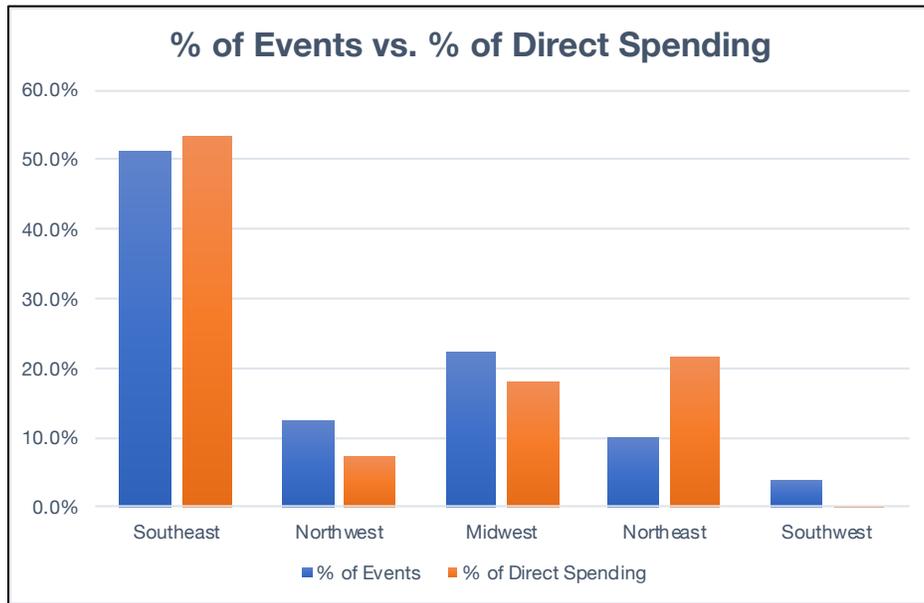
Based on this information, SFC recognizes the impact and concerns related to the COVID-19 pandemic and potential future interruptions but is confident that implementing best practices for operations will mitigate the risk to participants at youth and amateur sports and recreation facilities.

Events and Spending by Region

The chart below shows the distribution of events across five regions of the United States.

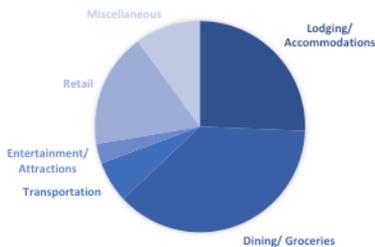


The chart below shows the percent of events and direct spending occurring in each region of the United States.

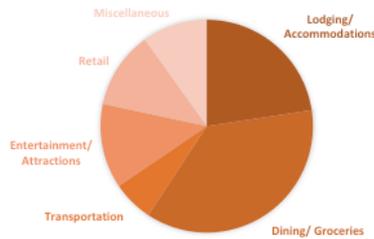


Average Expenditures

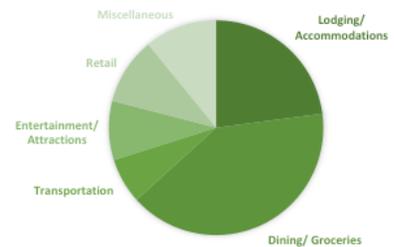
Based on data from hundreds of events, SFA analyzed how individuals and families typically spend when traveling for youth and amateur sports events by type of destination. The graphs below demonstrate the average individual spending per day and family spending per weekend for travelers attending events in standard and tourism destination markets. A standard market is categorized as a location that does not have a significant, established tourism industry while a tourism destination is defined as a location that generates significant activity through tourism outside of youth and amateur sports.



Standard Market
\$110.37/Person/Day
\$883/Family/Weekend



Tourism - Off-Peak
\$150.58/Person/Day
\$1,205/Family/Weekend



Tourism - Peak
\$185.82/Person/Day
\$1,487/Family/Weekend

As demonstrated in a standard market, families currently spend approximately \$883 per weekend of travel for youth and amateur sports tournaments and events.

Sports Tourism Destination and Operational Success Factors

In order to capitalize on the opportunities created by youth and amateur sports tourism activities as described above, there are several destination and operational success factors that are important in the industry today.

Destination Factors

- High Quality, Large Facilities and Assets
 - Youth and amateur sports tourism starts with facilities. With the proliferation of competitive destination facilities, amenity quality is increasingly important as well as the number of spaces available to host teams, participants, and spectators. Additionally, supporting amenities like food and beverage services, entertainment options, etc. create a competitive advantage for facilities that feature them.
- Variety of Lodging, Dining, and Entertainment Options
 - Outside of the facility, decisions related to events to attend are often made in part on the lodging, dining, and entertainments options in the market. For players and teams traveling regularly, having known brands and affordable options to choose from is often important. For players and teams traveling infrequently or for families opting to create a vacation around a tournament, having unique and exciting lodging, dining, and entertainment is critical.
- Desirable Competition
 - One of the primary reasons to travel for tournaments and events is to compete against unfamiliar teams. Tournaments that feature a mix of teams from a large geographic range and have a well-defined competitive level structure are best able to draw teams and to bring them back year after year.
- Affordability
 - Affordability continues to be a top concern of coaches, parents, and participants as they decide which events to attend and how many times to travel. The increase in number of competitive events and the expansion of traditional seasons has created a need to be cost conscious when selecting events.
- Reputation of the Destination
 - Establishing and maintaining a reputation as a great place to visit is a critical factor for attracting and retaining events and participants.

Operational Success Factors

- Program-Driven Design
 - In today's climate where new special-purpose sports tourism facilities are being opened regularly across the country, facilities must be built for and operated to create a best-in-class experience for visitors. In order to successfully attract, host, and retain events and participants, the facility must have been designed with event operations and participant satisfaction in mind.
- Dedicated Marketing and Business Development Personnel and Budget
 - With so many communities and facilities seeking to capture a portion of the sports tourism industry, it is imperative to dedicate people and money to marketing and selling opportunities. While the recommended organization structure and budget varies significantly from location to location, all successful destinations have some level of dedicated personnel and money available to secure business.
- Dedicated Management
 - Similar to dedicated resources to selling the facility, successful venues have a dedicated and specialized management team to ensure the investment into the facility is protected and the reputation within the industry is built and maintained.
- Collaboration
 - The youth and amateur sports tourism industry consists of a variety of existing destinations and events across activities, levels of competition, governing bodies, rules of play, etc. The increasingly mature industry now features an environment in which it is often difficult to build new events and attract visitors to events that are not already established. This necessitates collaboration with tournament and events rights holders to attract existing events, working with existing facilities to

- grow events that demand greater capacity, and maximizing visitation and economic impact during early years of operations.
- Owner, Member, and Community Buy-In
 - More often than not, sustainable facilities feature a balance of tournaments/events and local leagues, camps, clinics, etc. In order to set expectations for how an optimal balance is achieved and in order to execute on a well-rounded, sustainable business plan, the facility must educate all stakeholders and communicate the purpose as well as the schedule for tournaments and events on a regular and ongoing basis.

FACILITY PROGRAM & OPINION OF COST: NEW FACILITY DEVELOPMENT

New Facility Development

Based on the data and insights above, SFA has provided two facility program recommendations for the development of a new tournament-class indoor court complex in Springfield. The first facility program considers the existing spaces of the Springfield Expo Center. The second facility program incorporates spaces and asset types that match the Client's definitions of success and is right sized to supplement the redevelopment of the existing facility. In order to create a best-in-class asset that will allow the Client to achieve the definitions of success, SFA has developed two facility programs that demonstrate what could be built and how much each model is estimated to cost. For the first, SFA created a large, tournament-focused model that emphasizes larger indoor court space. SFA will refer to this as the "Existing Facility Redevelopment" model. SFA then created an additional model that supplements the existing facility redevelopment. SFA refers to this model as the "New Facility Model." SFA presented the included assets in this model based on the market opportunity and ensuring that the assets best meet the client's definitions of success in Springfield.

In total, SFA estimates that the Existing Facility Redevelopment will occupy the entire existing Springfield Expo Center, or about 197,000 square feet, and will cost approximately \$10.4 million. SFA estimates the New Facility Model to require an additional 1.5 acres of developable land and will cost approximately \$10.8 million including site development. The total combined facilities will cost approximately \$21.2 million to redevelop and develop.

Summary of Existing Facility Redevelopment Model Amenities

The recommended facility program for the redeveloped indoor facility features a six (6) court complex that will occupy the entire existing Springfield Expo Center, or approximately 197,000 square feet.

The facility program that follows outlines the recommended indoor amenities and space requirements.

Facility Program - Expo Center and West Mezzanine

Existing Building

Space	Indoor Programming Product/Service	Count	Dimensions		Approx. SF each	Total SF	% of Footprint
			L (')	W (')			
Expo Center Lower Level	Expo Center	1	-	-	45,000	45,000	22.9%
	Basketball Courts (actual courts 84' x 50')	6	98.5	75	Inside Expo Center		0.0%
	Volleyball Courts	6	60	30	Over Basketball Courts		0.0%
	Pickleball Courts	18	44	20	Over Basketball Courts		0.0%
	Total Court Sq. Ft.						45,000
Atrium	Atrium	1	-	-	13,000	13,000	6.6%
	Total Atrium Sq. Ft.						13,000
Concessions	Concessions 1- Atrium	1	-	-	375	375	0.2%
	Concessions 2- Atrium	1	-	-	375	375	0.2%
	Concessions 1- Expo Area	1	-	-	325	325	0.2%
	Total Concessions Sq. Ft.						1,075
Restrooms	Restrooms- Atrium	1	-	-	2,100	2,100	1.1%
	Restrooms- Expo Area	1	-	-	825	825	0.4%
	Restrooms- Expo Area	1	-	-	650	650	0.3%
	Total Restrooms Sq. Feet						3,575
Office	Office	1	-	-	300	300	0.2%
	Total Office Sq. Feet						300
Expo Center Street Level	Lobby Entrance	1	-	-	9,350	9,350	4.8%
	Total Lobby Sq. Ft.						9,350
Commissary	Kitchen/Commissary	1	-	-	5,800	5,800	3.0%
	Total Kitchen/Commissary Sq. Ft.						5,800
West Mezzanine (Lower Level)	Hall 1 - Admin & Tenant Level	1	-	-	26,000	26,000	13.2%
	Office/Admin	1	-	-	Inside Lower Level		0.0%
	Tenant Space	1	-	-	Inside Lower Level		0.0%
	Total Hall 1 Sq. Feet						26,000
West Mezzanine (Upper Level)	Hall 2 - Family Entertainment Level	1	-	-	26,000	26,000	13.2%
	FEC - Arcade, Mini-Bowling, Entertainment Area	1	-	-	Inside Street Level		0.0%
	Esports	1	-	-	Inside Street Level		0.0%
	Party & Meeting Rooms	6	-	-	Inside Street Level		0.0%
	Total Hall 2 Sq. Feet						26,000
Required SF for Products and Services						130,100	66.2%
Mechanical, Electrical, Storage, Common Areas, Circulation, etc.						66,446	33.8%
Total Estimated Indoor Athletic Facility SF						196,546	100%

By developing six basketball courts with six overlaid volleyball courts and 18 pickleball courts, the complex will be capable of hosting a wide range of court sports (basketball, volleyball, pickleball, wrestling, cheer, dance, gymnastics, and more) at a wide range of competitive levels. Additionally, the 26,000 square feet of Family Entertainment Center space serves to drive higher revenue per square foot and create a family-friendly attraction to non-sport participants during event and non-event times.

The Family Entertainment Level includes dedicated Esports terminals. These terminals offer the latest consoles, games, and operating software to local recreational and competitive gamers, as well as regional competitors. This space provides a first-class playing experience to participants of all ages and improves access to an exciting industry with established roots in Springfield. Additionally, SFA has considered the technological requirements of these spaces. SFA recognizes the potential to maximize efficiencies between the included gaming technology and further recognized other present and future facility technological needs. SFA has included dedicated kitchen and concession space. This 5,800 square foot area offers the facility the

opportunity to accommodate event hosting and provide a greater variety of food and beverage offerings between the two adjoined facilities.

It should be noted that SFA has not recommended the installation permanent hardwood courts, but rather the purchase of portable hardwood courts. Additionally, SFA has included a vinyl floor covering in the opinion of cost to protect the temporary courts during events that do not require the courts to be picked up; the time and cost of taking down, storing, and setting up temporary courts is significant, so the combination of portable courts and a high-quality cover will allow the venue to have maximum flexibility for sports and non-sports events.

Summary of Redeveloped Existing Facility Model Complex Development Costs

Based on SFA’s experience in developing sports and recreation facilities, the table below summarizes the opinion of cost for the Redeveloped Existing Facility Model Complex.

USES OF FUNDS	
Land Cost	\$0
Hard Cost	\$3,243,009
Field and Sport Equipment Cost	\$5,680,896
Furniture, Fixtures, and Equipment	\$596,402
Soft Costs Construction	\$845,823
Soft Costs Operations	TBD
Working Capital Reserve	TBD
Total Uses of Funds	\$10,366,130

Full details on the construction and start-up cost estimates for the Redeveloped Existing Facility can be found in the facility program and opinion of cost document, which has been delivered as an associated document.

Summary of New Facility Model Complex Amenities

The recommended facility for the indoor Community Model features a four (4) basketball court/eight (8) volleyball court/12 pickleball court complex that will require approximately 1.5 acres of developable land.

The facility program that follows outlines the recommended indoor amenities and space requirements.

Facility Program

New Building

Space	Indoor Programming Product/Service	Count	Dimensions		Approx. SF each	Total SF	% of Footprint
			L (')	W (')			
Courts	Basketball Courts (Actual Courts 84' x 50')	4	104	80	8,320	33,280	56.9%
	Volleyball Courts	8	60	30	Over Basketball Courts		0.0%
	Pickleball Courts	12	44	20	Over Basketball Courts		0.0%
	<i>Total Court Sq. Ft.</i>						33,280
Flex Space	Lobby/Welcome Area and Admin. Offices	1	40	40	1,600	1,600	2.7%
	Control Room	1	20	15	300	300	0.5%
	Ticket Office	1	15	10	150	150	0.3%
	Secondary Concessions and Seating Area	1	80	50	4,000	4,000	6.8%
	Flex/Team Rooms	2	25	20	500	1,000	1.7%
	Restrooms	2	25	20	500	1,000	1.7%
	Mezzanine	1	340	16	5,440	5,440	9.3%
<i>Total Flex Space Sq. Ft.</i>						13,490	23.1%
Required SF for Products and Services						46,770	80.0%
Mechanical, Electrical, Storage, etc. (Does Not Include Lease Space)						7,016	12.0%
Common Area, Stairs, Circulation, etc. (Does Not Include Lease Space)						4,677	8.0%
Total Estimated Indoor Athletic Facility SF						58,463	100%
Estimated Building Footprint						53,023	
Total Building Acreage						1.2	

Site Development

Set-backs	Quantity	Dimensions		Approx. SF each	Total SF	% of Total
		L (')	W (')			
	Setbacks, Green Space, etc.				13,256	100.0%
Total Estimated Site Development SF					13,256	100%
Total Site Development Acreage					0.3	
Total Complex Acreage					1.5	

By developing four basketball courts with eight cross-lined volleyball courts and 12 pickleball courts, the complex will be capable of hosting a wide range of court sports (basketball, volleyball, pickleball, wrestling, cheer, dance, gymnastics, and more) at a wide range of competitive levels.

Summary of New Facility Model Complex Development Costs

Based on SFA’s experience in developing sports and recreation facilities, the table below summarizes the opinion of cost for the New Facility Model Complex.

USES OF FUNDS	
Land Cost	\$0
Hard Cost	\$7,408,851
Field and Sport Equipment Cost	\$1,320,442
Furniture, Fixtures, and Equipment	\$792,932
Soft Costs Construction	\$1,327,072
Soft Costs Operations	TBD
Working Capital Reserve	TBD
Total Uses of Funds	\$10,849,298

Full details on the construction and start-up cost estimates for the New Facility Model can be found in the facility program and opinion of cost document, which has been delivered as an associated document.

The spaces in the new facility model reflected in the facility program options are what SFA believes have the potential to meet the Client’s definitions of success as individual asset types and are right sized to the local recreation needs and match the regional market opportunity for sports tourism.

Combined Facility Development Costs and Comparison to All New Construction Costs

TOTAL USES OF FUNDS (REDEVELOPED + NEW FACILITY)	
Land Cost	\$0
Hard Cost	\$10,651,860
Field and Sport Equipment Cost	\$7,001,339
Furniture, Fixtures, and Equipment	\$1,389,334
Soft Costs Construction	\$2,172,895
Soft Costs Operations	TBD
Working Capital Reserve	TBD
Total Uses of Funds	\$21,215,428

As a combined venue, the location would have more than 78,000 square feet of event floor space capable of being used as 10 basketball courts, 14 volleyball courts, and 30 pickleball courts. It would also have the capability of hosting major regional sports and non-sports events. With the inclusion of the family entertainment center, multiple meeting rooms, several concession stands, and other amenities to support events, this facility would be capable of being a premier destination in the region and a significant driver of tourism throughout the year.

As a combined total, SFA’s opinion of cost for both venues is \$21.2 million. It should be noted that no new parking has been included based on the parking that already exists near the Expo Center.

It is important to recognize the expected construction cost efficiency of retrofitting the existing Expo Center for use as a sports facility as opposed to building an entirely new facility in its place. As a basic overview, there are two scenarios to consider:

- Scenario 1: build a new 6-court sports facility with basic non-sport event capabilities, a family entertainment center, and recommended administrative and service spaces. In this case, SFA would expect the building to be at least 105,000 SF and cost at least \$210 per square foot. At that minimum size and cost per square foot, a new building would cost at least \$21.2 million to build as opposed to the \$10.4 million cost of retrofitting the Expo Center.
 - Note, SFA’s projected construction cost for the recommended new building is lower per square foot than the \$210 used in the scenario above because the recommended new building does not have basic event capabilities or the family entertainment center component, which are both more expensive to build than a basic sports facility.
- Scenario 2: build a new sports-capable Expo Center at the same size as the existing Expo Center, which is 197,000 square feet. In this case, SFA would expect the building

to cost at least \$275 per square foot, which equates to at least \$54.2 million to build as opposed to the \$10.4 million cost of retrofitting the Expo Center.

Both scenarios ignore the cost of demolition and the interruption of service, which would add an untold opportunity cost to the equation. In either scenario, the option to retrofit the Expo Center is clearly more efficient than all new construction.

The total redevelopment of the existing facility combined with the development of a new, adjoined facility would cost approximately \$21.2 million.

BUSINESS MODEL OVERVIEW

As mentioned throughout this report, one key area of focus for a new indoor sports complex will be to provide a sports tourism opportunity to the Springfield area and offer quality youth sport and recreation facilities to the Springfield community.

The information below is based on the vision of the Client as well as SFA's recommendation to establish a balance between serving the local community through local programs and the regional market through hosting sports tourism tournaments and events.

As mentioned in previous sections within this report, SFA's industry experience provides valuable insight into the management scenario for youth and amateur sports tourism complexes. In today's highly competitive sports tourism landscape, most successful youth and amateur sports tournament venues have a specialized management team with industry-specific experience and a proven track record of booking, hosting, and retaining tournaments. Management experience impacts booking because the event sales aspect of the sports tourism industry is highly relationship driven; established rights holders must have confidence in the facility and its management team in order to create a new event or move an existing event to a new location.

Management experience impacts hosting and retaining events because the requirements of each sport and each organization is different and every event day is unique; a management team that has navigated the distinct challenges of a wide variety of youth and amateur sports tournaments is critical to ensuring the satisfaction of rights holders, athletes, spectators, coaches, and referees. As such, SFA strongly recommends that the Springfield Sports and Events Center hires a proven sports tourism management team or outsources management to a top-tier operator.

Local Programming Model

The local programming model is designed to make any facility development a year-round sports and recreation hub for local residents by serving as a community asset providing sports, physical health, recreation, and youth development programming, regardless of skill levels or abilities. By creating a fun, active space with high-quality programming and amenities, the spaces detailed in the facility program will be able to host a multitude of activities and serve a wide range of community pursuits.

Based on conversations with the Client, SFA's recommendations for existing assets, and the spaces and amenities detailed in the facility program a sports complex has the potential to offer programming for any or all of the following activities from in-house and/or partner organizations:

- Basketball
Recreational and
Competitive
Leagues
- Basketball Camps
- Basketball Clinics
- Basketball
Tournaments
- Wrestling
Tournaments
- Wrestling Practices
- Wrestling Camps,
Clinics, and
Coaching Lessons
- Volleyball
Recreational and
Competitive
Leagues
- Volleyball Camps
- Volleyball Clinics
- Volleyball
Tournaments
- Drop-In Pickleball
Matches
- Pickleball
Tournaments
- Indoor Archery
Competitions
- Gymnastics
Competitions

- Competitive Dance Competitions
- Cheerleading Competitions
- Esports Clubs
- Esports Local Competitions
- Esports Tournaments

Program Mix

The programs listed above offer a robust programming model to be featured at the Springfield complex including in-house and partner organization offerings. While a model more heavily focused on partner and rental programming typically takes less time to grow revenues and guarantees revenue for the model, it limits the long-term revenue growth opportunities.

SFA recommends a facility program mix that includes internal or in-house programs in addition to rental or outside service provider programs. In-house programming presents the complex with the following growth and business development opportunities:

- **Greater Ownership of the Business:** Running in-house programs will allow the management team to dictate all aspects of the products and services being offered in the facility. This ownership provides the ability to make decisions regarding marketing, sales, and operations of all programs. Furthermore, the facility will rely less on the skills, experience, and relationships of outside people or organizations and therefore strengthen the complex's ability to offer best-in-class services to its customers.
- **Control of the Customer Experience:** All programs are a reflection of the facility and affect customer perception of the brand. With a rental model, a facility has a minimal level of control over program quality and customer experience. If a program run by an outside organization does not meet customer expectations, the facility will be directly associated with that bad experience. On the other hand, internal programs allow the facility to control the quality of customers' experiences.
- **Higher Financial Returns:** Rental programs are limited in the level of revenue they are able to generate. This relatively flat revenue restricts the ability to capitalize on growth opportunities. An internal program business model creates the opportunity for the facility to grow programs and increase the amount of revenue that can be generated per hour. With the proper investment in and development of in-house programs, the facility will be able to generate significantly higher levels of revenue.
- **Facility Database and Cross Marketing:** Internal programming presents the facility with the opportunity to build an extensive internal database of its customers. Owning and running in-house programs will allow the facility to capture and retain important customer contact information. This internal database will create a platform for the management team to cross-market appropriate programs to people who are already customers and invested in taking part in the products and services that the facility has to offer. The ability to cross-market to an internal database is substantially more effective than many traditional marketing initiatives.
- **Ability to Maximize Scheduling:** A rental-only model restricts the management team's ability to maximize program scheduling. This is a result of the desire of outside programmers and rentals to purchase only the best and prime time hours in the facility. With an in-house program model, the management team will be able to dictate the day and time that programs are run and therefore allow the facility to maximize the use of available scheduling time.

A gradual transition towards a higher level of internal programming after opening will allow the facility to maintain relationships and utilize outside programming during the maturation process. As the facility matures, shifting to an increased percentage of internal programs will allow the facility to capitalize on opportunities to grow programs and contribute to a higher level of financial sustainability.

Sports Tourism Operating Model

To more clearly define the goal of generating economic impact through sports tourism events, SFA has described the sports tourism operating model below.

The goal of a sports tourism model is to attract out-of-town teams, players, coaches, and spectators to the market to generate revenue for the facility and to create economic impact through non-local visitors staying in hotels, eating at restaurants, shopping at stores, purchasing gas, etc. Within the sports tourism model, there are two primary ways of developing tournaments: creating in-house tournaments and outsourcing tournaments to existing organizers/rights holders.

In-house tournaments require a significant amount of time, energy, and human resources to develop and execute. This type of event requires the facility to market the event, register teams, secure hotels, train staff, hire officials, manage play, etc. As such, significant revenue can be generated, but the cost of doing business is high. Additionally, tournaments typically take multiple years to grow, and as a result first year (and often second year) events are small, marginally profitable, and create a minimal economic impact.

Outsourced tournaments require much less work on the part of the facility because inventory is rented to a tournament provider who is in charge of securing teams and running the event. Additionally, they often provide greater economic impact in the early years of operation because they are not first-year events, and therefore there are more teams in attendance. However, the amount of revenue the facility can generate on an outsourced tournament is limited because team registration fees go to the rights-holder, as do other revenue streams (e.g., hotel rebates, gate fees, etc.).

SFA has found that it is typical for facilities with a sports tourism business model to require an annual operating subsidy. This is due to the fact that events that generate economic impact provide the facility with one-off revenue streams that occur a limited number of times each year but require large facilities that are overbuilt for the local market opportunity. For facilities that pursue sports tourism as an economic driver, room night, direct spending, and new tax revenues generated from events are viewed as an attractive return on the investment relative to the subsidization of operations. As such, these types of facilities serve as a driver of traffic and spending to other businesses in the adjacent area such as hotels, restaurants, retail stores, etc.

Based on the vision of the Client, SFA believes that there will be a hybrid business model between the local programming model and the sports tourism operating model in order to maximize sustainability. As such, the level of financial and economic impact performance will depend on the type of assets, mix of assets, and business model within any facility that is developed.

EXAMPLE FACILITY PERFORMANCE BENCHMARKS

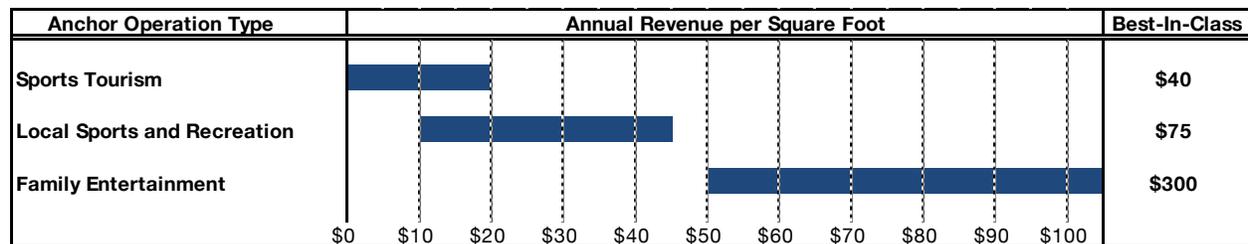
Summary of Financial Performance

While SFA has yet to complete a full, detailed five-year financial forecast for the spaces in the facility program for the new sports complex, it has evaluated the preliminary financial performance opportunities based on industry benchmarks for financial performance. These benchmarks are derived from surveys, financial reports, and actual profit and loss statements from real-world operations. Taking the vision for the new complex into account, as well as the general opportunity for sports, tournaments, events, and recreation in the market, SFA is able to provide data and information related to industry benchmarks for facility financial performance. These benchmarks are derived from case studies and data collection for existing operations that are relevant to the desired business models planned for a new sports complex.

As part of this preliminary analysis, SFA has applied industry benchmarks to the assets outlined in the facility program. The financial performance ranges below are not intended to represent a full set of projections or to be used in place of a detailed pro forma, but rather to demonstrate how the assets and spaces included in the facilities recommended for full analysis would perform if they achieved financial performance benchmarks from the youth and amateur sports and recreation industry. SFA has also included preliminary economic impact estimates to serve as high-level reference points for the Client. More accurate and detailed economic impact calculations would be completed should the Client engage SFA for Phase II.

Industry Factors – Business Model

As described earlier in the “Business Model Overview” section of this report, the complex could feature a hybrid business model focused on local programming as well as regional sports tourism, with emphasis on each programming. Based on the mix of assets in the facility program, the new indoor facilities could offer a variety of revenue types under the outlined business models. The chart below shows industry average ranges for annual revenue per square foot and the best-in-class performance threshold for the main revenue types within the indoor facility spaces: sports tourism, local sports and recreation, and family entertainment.



As demonstrated by the chart above, regional sports tourism tournaments and events generate less revenue per square foot than programs focused on local programming. Local sports and recreation programs such as leagues, camps, and clinics are often programmed over the same spaces as sports tourism events, however, do not require the same heightened degree of facility space to operate. When combined with the ability to develop in-house programming, those factors create opportunities to generate more revenue per square foot over sports and recreation spaces.

Revenue Generation by Asset Type – Indoor Sports Facility (Redeveloped Facility and New Facility Model)

The charts that follow demonstrate the sizes of the primary indoor facility assets in the facility program and the potential revenue performance at the industry average, high performing, and top performing revenue per square foot benchmarks from the industry. These revenues include rentals, leagues, camps, clinics, tournaments, training, etc.

Program Area Revenue Per Square Foot Data: Private, For-Profit Indoor Sports and Recreation Facility							
	SF	Industry Avg.		High Performing		Top Performing	
		Rev./SF	Total	Rev./SF	Total	Rev./SF	Total
Court	45,000	\$20	\$900,000	\$30	\$1,350,000	\$35	\$1,575,000
Family Entertainment Area	26,000	\$40	\$1,040,000	\$70	\$1,820,000	\$120	\$3,120,000

The revenue potential for each space is dependent on the amenity and programs offered. As shown in the table above, based on the indoor court and Family Entertainment area included in the Existing Facility Redevelopment Model, total potential program revenue ranges from approximately \$1.9 million at the industry average to approximately \$4.7 million at the top performing revenue per square foot benchmark.

Program Area Revenue Per Square Foot Data: Private, For-Profit Indoor Sports and Recreation Facility							
	SF	Industry Avg.		High Performing		Top Performing	
		Rev./SF	Total	Rev./SF	Total	Rev./SF	Total
Court	33,280	\$20	\$665,600	\$30	\$998,400	\$35	\$1,164,800

The revenue potential for each space is dependent on the amenity and programs offered. As shown in the table above, based on the indoor court areas included in the New Facility Model, total potential program revenue ranges from approximately \$665,000 at the industry average to approximately \$1.2 million at the top performing revenue per square foot benchmark.

Total Revenue Generation Expectations (Redeveloped Existing Facility Model and New Facility Model)

There are a wide variety of factors that influence total revenue generation opportunities. Based on SFA’s experience in planning facilities and in line with SF Companies experience across the full spectrum of planning, funding, developing, and managing youth and amateur sports, recreation, wellness, event, and entertainment venues similar to those recommended in Springfield, SFA expects the total annual revenue potential to be between \$3,000,000-5,000,000 million.

POTENTIAL FUNDING SOURCES

Based on SFA's experience in planning and funding facilities similar to the new tournament-class court and long field complexes recommended above, the following funding mechanisms have been deployed successfully in recent projects across the country. It should be noted that in today's development climate, most projects have a diverse set of funding sources.

Borrowing

- *General Obligation Bond: Capital Investment*
 - A loan is taken out by a government agency with taxing authority. Property taxes are levied to pay back bondholders, and therefore it is considered to be backed by the full faith and credit of the issuing agency.
- *General Obligation Bond: Voter Referendum*
 - A loan is taken out by a government agency that requires voter approval.
- *Revenue Bond*
 - A loan is taken out by a government agency based on anticipated revenue generated from the project for which the bond is issued.

Special Districts

- *Tax Increment Financing (TIF)*
 - A district is developed specifically for the purpose of incentivizing development. Upon establishment, the tax base of the district is frozen and any increase to the tax base as a result of new developments are used to pay the TIF bonds.
- *Taxes on Business Improvement Districts (BIDs)*
 - A district is developed where businesses are required to pay an additional tax to fund projects within the boundaries of the district.
- *Opportunity Zones*
 - An economically distressed community where new investments, under certain conditions, become eligible for preferential tax treatment. Localities qualify as Opportunity Zones if they have been nominated for that designation by the state and that nomination has been certified by the Secretary of the U.S. Treasury via their delegation of authority to the Internal Revenue Service. The current Springfield Expo Center site operates within an existing Opportunity Zone that could benefit facility development for the current project.
- *Park Dedication Fees*
 - Parkland dedication is a local government requirement imposed on subdivision developers or builders mandating that they dedicate land for a park and/or pay a fee to be used by the governmental entity to acquire and develop park facilities.
- *Purchase of Development Rights*
 - Private landowners relinquish their right to build on their land but retain the title to the property. This is most commonly applied to agricultural and farmland, but land laws vary by state.

Traditional Tax Generated Revenue

- *Property Tax*
 - A tax that is paid for by commercial and residential property owners. This can be appropriated through the general fund to support facility operations, maintenance, and construction.
- *Sales/Use Tax*

- A tax that applies to the sale of goods and services. Examples of the specialty excise taxes include hotel occupancy taxes used to fund sports tourism or tax collected on non-highway fuel use to fund the Federal Highway Trust Fund, a portion of which supports the Recreation Trails Program.
- *Hotel Tax – Enabling Legislation*
 - A marginal tax that is included on hotel room bookings that raises revenues for related governmental or publicly-connected tourism projects. This funding mechanism is relevant at the current moment but not currently applicable to the Springfield, MO project. The Client should review the potential for this funding mechanism for the next calendar year.

Missouri and Springfield-Specific Funding Mechanisms

- *Amateur Sporting Tax Credit Program – Event/Event Promotion Funding*
 - This program provides local community organizations incentives to help those organizations secure location of amateur sporting events in their communities. This mechanism is available for one or more certified sponsors, endorsing counties, endorsing municipalities, or a local organizing committee, acting individually or collectively, within the state of Missouri.

Partnerships

- *Public-Private Partnerships*
 - Development and/or operational commitments are made both public and private organizations in order to provide capital, credit, or long-term income to secure or back a loan. Private sector partners are most commonly developers, medical sector organizations, for-profit sports or wellness organizations, and non-profit sports or wellness organizations. The Public-Private Partner relationship can encompass a few or all of the following facility development phases: design, build, finance, operate, and/or manage.
- *Public-Public Partnerships*
 - Development and/or operational commitments are made two public sector organizations in order to provide capital, credit, or long-term income to secure or back a loan. Public sector partners are most commonly Cities/Towns/ Villages, Counties, Parks & Recreation Departments, Chamber/CVB/Tourism Departments, and School Districts.

CONCLUSION AND NEXT STEPS

Based on the work completed to date, SFA believes that an opportunity exists to develop a sports tourism complex in Springfield, MO with the capability of meeting the Client's objectives that will:

- Develop an impactful sports complex that serves as an economic impact driver in the Springfield area through the hosting of regional tournaments and sports tourism events and attracting, as well as retaining, high quality tournaments and events.
- Improve access to local recreational spaces in order to meet demand while enhancing the local quality of life and providing sports and recreation assets where they do not presently exist.
- Become a tournament and event destination facility that attracts non-local visitors to Springfield and drives economic impact and hotel room nights.
- Stimulate local marketing and tourism by introducing new and redeveloping existing quality sports facilities that will diversify the existing Springfield tourism asset base.
- Reconfigure the existing Springfield Expo Center into a sport and event facility that will significantly out-perform its current configuration as an exhibit hall in both room-night generation and overall economic impact.

Taking those definitions of success into account, SFA has detailed the initial recommendations for existing assets as well as the facility program of spaces for the development of new sports tourism facilities that have the highest likelihood to achieve the Client's goals. The recommendations are what SFA believes have the potential to meet the Client's definitions of success as individual asset types and are right sized to meet the sports tourism opportunities.

A full assessment of financial/operational feasibility will require the development of a detailed financial forecast and economic impact analysis, which has been outlined as the next phase of work for the project.

If the Client chooses to move forward with Phase II, SFA recommends the:

- Completion of a detailed financial forecast (pro forma).
 - The financial model will help to understand the operational realities of the recommendations and what amenities and will best contribute to the definitions of success of the Client.
- Development of an economic impact analysis based on the operational forecast.
 - The economic impact analysis will project the non-local visitation, room night generation, and direct spending as a result of tournaments and events hosted through the facility assets which would benefit the surrounding Springfield community.
- Exploration of potential for funding mechanisms, development incentives, and/or strategic partnerships that could create a viable investment into the enhancement of existing facilities and construction and operation of a new facility.
 - The exploration of funding mechanisms, development incentives, and strategic partnerships will assist in answering questions such as how the facility will be utilized, if it makes more sense to enhance existing facilities or develop new facilities, and how the Client will fund the project.
- Creation of an optimized facility program and business model(s).
- Completion of a narrative document summarizing the optimized facility program and business model, financial forecast, and economic impact analysis.

It is critical that, prior to moving forward with the development, the Client consider the findings and recommendations in this document. Each of the recommendations should be addressed throughout the next phases of work.

SFA is available to assist in any or all of the above steps and welcomes the opportunity to discuss these findings with the Client in order to support the formulation of a decision related to the development of a new sports tourism complex and redevelopment of existing assets in Springfield.

APPENDIX

SFA Demographic Report

Demographic Highlights	10 minutes	15 minutes	30 minutes	60 minutes
Total Population	111,913	196,451	381,164	655,782
2020 Median Age (Esri)	32.7	36.0	37.6	39.1
2020 Median Household Income (Esri)	\$30,378	\$37,522	\$47,090	\$45,361
2020 Average Household Income (Esri)	\$41,807	\$53,981	\$65,565	\$62,363
2020 Per Capita Income (Esri)	\$18,031	\$23,512	\$26,799	\$24,967
2020 Household Population (Esri)	102,836	185,883	369,381	638,265
2010-2017 Population: Annual Growth Rate (Esri)	0.58	0.64	0.88	0.73
2017-2022 Population: Annual Growth Rate (Esri)	0.69	0.72	0.95	0.78
2017-2022 Median Household Income: Annual Growth Rate (Esri)	1.09	0.93	1.35	1.33
2017-2022 Per Capita Income: Annual Growth Rate (Esri)	1.69	1.80	2.07	2.01
2020 Total Households (Esri)	47,686	85,086	155,418	261,943
2020 Total Family Households (Esri)	22,521	44,765	96,853	170,885
2020 Average Household Size (Esri)	2.16	2.18	2.38	2.44

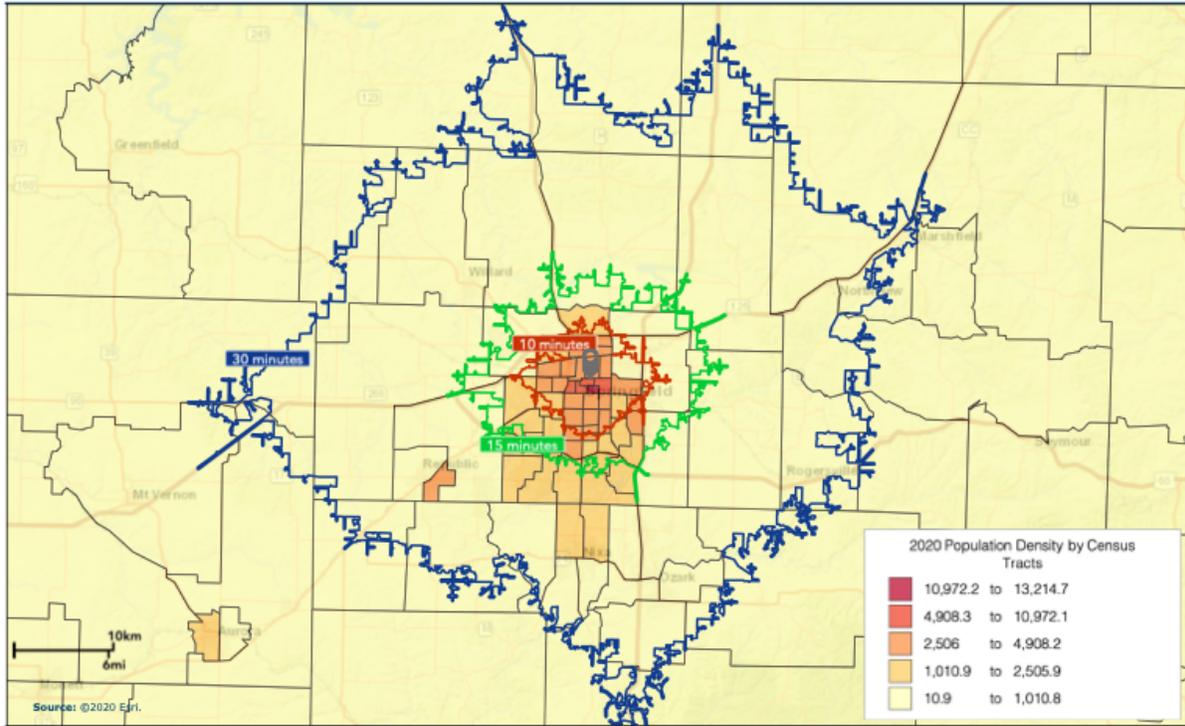
Age Breakdown	10 minutes	15 minutes	30 minutes	60 minutes
2020 Total Population Age 0-4 (Esri) (%)	5.80%	5.60%	5.86%	5.92%
2020 Total Population Age 5-9 (Esri) (%)	5.32%	5.36%	5.95%	6.06%
2020 Total Population Age 10-14 (Esri) (%)	5.06%	5.22%	5.96%	6.12%
2020 Total Population Age 15-19 (Esri) (%)	7.80%	6.67%	6.48%	6.30%
2020 Total Population Age 20-24 (Esri) (%)	13.20%	10.32%	8.00%	7.06%
2020 Total Population Age 25-29 (Esri) (%)	8.49%	7.82%	7.15%	6.76%
2020 Total Population Age 30-34 (Esri) (%)	7.99%	7.71%	7.02%	6.56%
2020 Total Population Age 35-39 (Esri) (%)	6.68%	6.83%	6.77%	6.38%
2020 Total Population Age 40-44 (Esri) (%)	5.29%	5.57%	5.95%	5.79%
2020 Total Population Age 45-49 (Esri) (%)	5.05%	5.22%	5.89%	5.93%
2020 Total Population Age 50-54 (Esri) (%)	5.08%	5.25%	5.87%	6.00%
2020 Total Population Age 55-59 (Esri) (%)	5.57%	5.82%	6.34%	6.64%
2020 Total Population Age 60-64 (Esri) (%)	5.14%	5.62%	5.97%	6.37%
2020 Total Population Age 65-69 (Esri) (%)	4.20%	4.95%	5.20%	5.66%
2020 Total Population Age 70-74 (Esri) (%)	3.25%	4.07%	4.26%	4.69%
2020 Total Population Age 75-79 (Esri) (%)	2.29%	3.00%	3.01%	3.31%
2020 Total Population Age 80-84 (Esri) (%)	1.63%	2.18%	2.02%	2.17%
2020 Total Population Age 85+ (Esri) (%)	2.18%	2.82%	2.31%	2.28%
2020 Total Population Age 18+ (Esri) (%)	81.20%	81.03%	78.90%	78.46%

Household Income Breakdown	10 minutes	15 minutes	30 minutes	60 minutes
2020 Household Income less than \$15,000 (Esri) (%)	26.10%	20.10%	14.60%	13.80%
2020 Household Income \$15,000-\$24,999 (Esri) (%)	14.20%	12.50%	11.20%	12.20%
2020 Household Income \$25,000-\$34,999 (Esri) (%)	15.80%	14.00%	11.60%	12.00%
2020 Household Income \$35,000-\$49,999 (Esri) (%)	15.50%	15.30%	14.80%	15.90%
2020 Household Income \$50,000-\$74,999 (Esri) (%)	15.60%	17.50%	18.80%	19.20%
2020 Household Income \$75,000-\$99,999 (Esri) (%)	6.80%	9.20%	11.50%	11.40%
2020 Household Income \$100,000-\$149,999 (Esri) (%)	4.30%	6.80%	10.50%	9.80%
2020 Household Income \$150,000-\$199,999 (Esri) (%)	0.90%	2.20%	3.50%	3.00%
2020 Household Income \$200,000 or greater (Esri) (%)	0.90%	2.40%	3.50%	2.80%

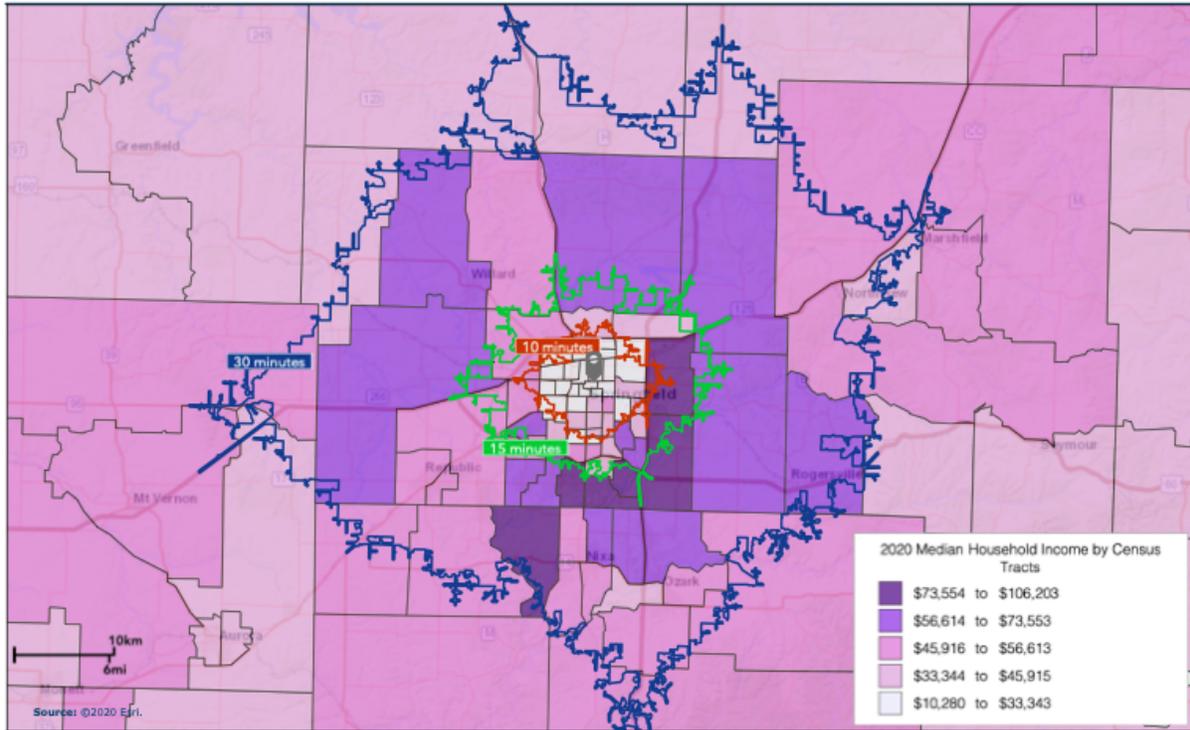
Spending: Recreation	10 minutes	15 minutes	30 minutes	60 minutes
2020 Membership Fees for Social/Recreation/Civic Clubs (Avg)	105.91	139.35	170.60	154.72
2020 Fees for Participant Sports excluding Trips (Avg)	42.40	56.86	72.04	64.72
2020 Fees for Recreational Lessons (Avg)	56.34	75.77	95.34	84.64
2020 Camp Fees (Avg)	18.36	27.50	35.13	33.99

Educational Attainment	10 minutes	15 minutes	30 minutes	60 minutes
2020 Education: Less than 9 th Grade (Esri) (%)	2.82%	2.04%	1.76%	2.54%
2020 Education: 9-12 th Grade/No Diploma (Esri) (%)	8.13%	6.13%	5.35%	7.02%
2020 Education: High School Diploma (Esri) (%)	24.43%	22.88%	23.34%	26.82%
2020 Education: Some College/No Degree (Esri) (%)	26.29%	25.95%	25.43%	25.13%
2020 Education: Associate's Degree (Esri) (%)	8.12%	7.95%	8.44%	8.20%
2020 Education: Bachelor's Degree (Esri) (%)	14.79%	18.59%	19.55%	16.15%
2020 Education: Graduate/Professional Degree (Esri) (%)	8.53%	11.24%	11.82%	9.41%
2020 Education: GED/Alternative Credential (Esri) (%)	6.90%	5.22%	4.31%	4.71%
2020 Educational Attainment Base (Esri)	70,317	131,302	258,276	449,474
Race and Ethnicity	10 minutes	15 minutes	30 minutes	60 minutes
2020 Hispanic Population (Esri) (%)	5.55%	4.91%	3.97%	4.37%
2020 Hispanic White Population (Esri) (%)	49.59%	52.54%	55.31%	52.00%
2020 Hispanic Black/African American Population (Esri) (%)	2.30%	2.18%	1.96%	1.89%
2020 Hispanic American Indian/Alaska Native Population (Esri) (%)	3.77%	3.23%	2.80%	2.40%
2020 Hispanic Asian Population (Esri) (%)	0.48%	0.52%	0.60%	0.51%
2020 Hispanic Pacific Islander Population (Esri) (%)	0.18%	0.15%	0.14%	0.24%
2020 Hispanic Other Race Population (Esri) (%)	30.81%	29.44%	27.85%	33.22%
2020 Hispanic Population of Two or More Races (Esri) (%)	12.87%	11.94%	11.35%	9.75%
2020 White Population (Esri) (%)	84.00%	86.27%	89.93%	91.29%
2020 Black/African American Population (Esri) (%)	5.90%	4.66%	2.89%	2.09%
2020 American Indian/Alaska Native Population (Esri) (%)	0.96%	0.80%	0.71%	0.78%
2020 Asian Population (Esri) (%)	2.48%	2.62%	2.03%	1.46%
2020 Pacific Islander Population (Esri) (%)	0.19%	0.15%	0.10%	0.09%
2020 Other Race Population (Esri) (%)	1.79%	1.53%	1.17%	1.51%
2020 Population of Two or More Races (Esri) (%)	4.68%	3.96%	3.17%	2.78%
2020 Non-Hispanic Population (Esri) (%)	94.45%	95.09%	96.03%	95.63%
2020 White Non-Hispanic Population (Esri) (%)	86.03%	88.01%	91.36%	93.09%
2020 Black/African American Non-Hispanic Population (Esri) (%)	6.11%	4.79%	2.93%	2.09%
2020 American Indian/Alaska Native Non-Hispanic Population (Esri) (%)	0.80%	0.68%	0.62%	0.70%
2020 Asian Non-Hispanic Population (Esri) (%)	2.60%	2.72%	2.09%	1.50%
2020 Pacific Islander Non-Hispanic Population (Esri) (%)	0.19%	0.15%	0.10%	0.08%
2020 Other Race Non-Hispanic Population (Esri) (%)	0.08%	0.09%	0.07%	0.07%
2020 Multiple Races Non-Hispanic Population (Esri) (%)	4.20%	3.55%	2.83%	2.46%
2020 Minority Population (Esri) (%)	18.75%	16.31%	12.27%	10.98%
2020 Diversity Index (Esri)	36.5	32.3	25.2	23.6
2020 Population by Race Base (Esri)	111,913	196,451	381,164	655,782

LOCAL MARKET (10, 15, 30-MIN DRIVE TIME) – POPULATION DENSITY



LOCAL MARKET (10,15, 30-MIN DRIVE TIME) – MEDIAN HOUSEHOLD INCOME



LOCAL FACILITIES

Indoor Court Facilities	Drive time (minutes)
John Q. Hammons Student Center	3
JQH Arena	3
Bill R. Foster and Family Recreation Center	4
O'Reilly-Tefft Gymnasium	5
Apex Volleyball Club	5
Parkview High School Gymnasium	7
Mabee Student Fitness Center	8
Oak Grove Park and Community Center	10
CoxHealth The Meyer Center	12
Dan Kinney Family Center	14
Kickapoo High School	14
Hickory Hills Middle School	14
Pat Jones YMCA	15
Redline Athletics James River Expressway	16
The Fieldhouse Sportscenter	18
Strafford Sports Center	20
Strafford High School	20
417 Athletics	39

Sports Performance Facilities	Drive time (minutes)
Big Time Results	9
Training Day Sports	14
GP Athletics	15
Carr PT and Sports Performance	15
Intentional Fitness	15
Redline Athletics James River Expy	16
Lolar Strength and Performance	18

Family Entertainment Center Facilities	Drive time (minutes)
Craft Axe Throwing	3
Fun Acre	9
Springfield's Incredible Pizza Company	10
Sunshine Lanes	10
Enterprise Park Lanes	10
Andy B's Bowling - Springfield	11
Urban Air and Trampoline Park	12
GlowGolf	12
Itty Bitty City	13

Springfield Escape Room	13
Chuck E. Cheese	15
417 Escape Artist	17
Jump Mania	18
160 Grand Prix	19
Swing Right Golf	19

Indoor Turf Facilities	Drive time (minutes)
Lake Country Youth Soccer	6
Marucci Clubhouse Midwest	20
CY Indoor Sports Center	21

REGIONAL FACILITIES

Indoor Court Tournament Facilities			
Facility	City	Drive time (minutes)	Amenities
Elite Sports Center - Lenexa	Lenexa, KS	161	4 futsal courts
Drive5 Sports Center	Overland Park, KS	162	3 BB courts
Mid-American West Sports Complex (Okun Fieldhouse)	Shawnee, KS	163	4 BB/8 VB courts
Columbia Sports Fieldhouse	Columbia, MO	166	4BB Courts/5VB with various spectator bleachers and meeting rooms
Homefield Olathe	Olathe, KS	168	10 multi-sport flex courts
New Century Fieldhouse	New Century, KS	171	4 BB/8 VB courts
Lawrence Sports Pavilion	Lawrence, KS	189	8 BB/16 VB courts
Robinson Center	Lawrence, KS	189	6 BB courts
Center St. Louis	St. Louis, MO	200	6 BB/10 VB courts
Bud Dome Sports Complex	St. Louis, MO	200	2 BB/4 VB courts
Olympia Athletics & Events Centre	St. Charles, MO	204	4 BB/8 VB courts
Titan Sports and Performance Center	Tulsa, OK	207	6 BB/12VB Courts
Sport Zone	Topeka, KS	214	4BB courts/5VB with small turf surface indoor field
Family Sportsplex - Belleville Sportsplex	Belleville, IL	218	3 BB/4 VB courts
Wichita Sports Forum	Wichita, KS	246	9 VB courts
Cape Girardeau Sportsplex	Cape Girardeau, MO	257	6 BB/VB courts

REGIONAL INDOOR COURT EVENTS

Tournament Name	Facility	Location	Games	Dates	Price	Teams	Level
Basketball							
Bracket Buster	Southmoore Schools	Moore, OK	3 min	Sept 14-15, 2019	\$140	25	boys & girls grades 2-12
GTH One Day Event	James Mission	Tulsa, OK	3 min	9/14	\$100		girls grades 1-12
September 14th One Day Event	Cushing Middle School	Cushing, OK	3 min	9/14	\$40-\$120		boys & girls grades 2-12
BigTime Challenge	multiple venues	OKC, OK	3 min	9/14	\$175		boys & girls grades 1-12
BigTime Challenge		Stillwater, OK	3 min	9/14	\$175		boys & girls grades 1-12
BigTime Challenge		Tulsa, OK	3 min	9/14	\$175		boys & girls grades 1-12
MAYB Oklahoma City OK Basketball Tournament	The Hive	OKC, OK	3 min	9/14	\$175		boys & girls grades 3-12
MAYB Wichita KS Basketball Tournament	Wichita Sports Forum	Wichita, KS	3 min	9/14	\$175		boys & girls

							grades 3-12
Big Event OKC	Santa Fe Family Life Center & surrounding area gyms	OKC, OK	3 min	Sept 15-16, 2018	\$175		boys & girls grades 1-12
SOI One Day/ Fall League Week 3	RobCo Event Center	Piedmont, OK	3 min	9/15		28	boys & girls grades 2-12
MAYB Oklahoma City OK	The Hive	OKC, OK	3 min	Sept 15-16, 2018	\$175		boys & girls grades 3-12
MAYB Wichita KS	Wichita Sports Forum	Wichita, KS	3 min	9/15	\$175		all ages
SOI One Day/ Fall League Week 4	RobCo Event Center	Piedmont, OK	3 min	9/22		26	boys & girls grades 2-12
MAYB Wichita KS	Wichita Sports Forum	Wichita, KS	3 min	9/22	\$175		boys & girls grades 3-12
Pink Out Del City	Del City HS, Del Crest MS, Kerr MS	Del City, OK	3 min	Sept 22-23, 2018	\$100-\$110	40	boys & girls grades 2-12
SOI One Day/ Fall League Week 5	RobCo Event Center	Piedmont, OK	3 min	9/29		32	boys & girls grades 2-12
MAYB Oklahoma City OK	The Hive	OKC, OK	3 min	Sept 29-30, 2018	\$175		boys & girls grades 3-12

MAYB Wichita KS	Wichita Sports Forum	Wichita, KS	3 min	9/29	\$175		boys & girls grades 3-12
SOI One Day/ Fall League Week 6	RobCo Event Center	Piedmont, OK	3 min	10/6		29	boys & girls grades 2-12
MAYB Topeka KS	Topeka West High School	Topeka, KS	3 min	10/6	\$175		boys & girls grades 3-12
Miwest Regionals Invitational	Drive5 Sports Center	Overland Park, KS	3	12/15-12/17	\$155	72	3gr-8gr
Dashing Thru the Court	Drive5 Sports Center	Overland Park, KS	3	12/8-12/10	\$155	72	3gr-8gr
Winter Kick-Off	Drive5 Sports Center	Overland Park, KS	3	12/1-12/3	\$155	102	2gr-8gr
Fall Brawl	Drive5 Sports Center	Overland Park, KS	3	11/17-11/19	\$155	62	3gr-8gr
November Hoopfest	Drive5 Sports Center	Overland Park, KS	3	11/10-11/12	\$155	60	2gr-8gr
Fall Challenger	Drive5 Sports Center	Overland Park, KS	3	11/3-11/5	\$155	66	5gr-HS
Hoops N' Howls	Drive5 Sports Center	Overland Park, KS	3	10/27-10/29	\$155	78	2gr-HS
Autumn Madness	Drive5 Sports Center	Overland Park, KS	3	10/20-10/22	\$155	83	5gr-HS
Fall Ball Battle	Drive5 Sports Center	Overland Park, KS	3	10/13-10/15	\$155	70	3gr-HS
Festival of Hoops	Drive5 Sports Center	Overland Park, KS	3	10/6-10/8	\$155	76	4gr-HS

Midwest Fall Showcase	Drive5 Sports Center	Overland Park, KS	3	9/29-10/1	\$155	69	5gr-HS
Battle of the Boards	Drive5 Sports Center	Overland Park, KS	3	9/22-9/24	\$155	60	4gr-HS
Ballers Showdown	Drive5 Sports Center	Overland Park, KS	3	9/15-9/17	\$155	55	4gr-HS
Fall Kick-Off	Drive5 Sports Center	Overland Park, KS	3	9/8-9/10	\$155	33	4gr-HS
Sweatin' Buckets Jamboree	Drive5 Sports Center	Overland Park, KS	3	8/26-8/26		40	U11-HS
August Jamboree	Drive5 Sports Center	Overland Park, KS	3	8/19-8/19		41	5gr-HS
Summer Finale	Drive5 Sports Center	Overland Park, KS	3	8/11-8/13	\$155	65	3gr-HS
Midwest Challenger	Drive5 Sports Center	Overland Park, KS	3	7/15-7/16	\$155	64	3gr-HS
OP Rumble	Drive5 Sports Center	Overland Park, KS	3	7/7-7/9	\$155	49	4gr-HS
Bring the Heat	Drive5 Sports Center	Overland Park, KS	3	6/30-7/2	\$155	40	4gr-HS
Summer Tip-Off	Drive5 Sports Center	Overland Park, KS	3	6/23-6/25	\$155	49	3gr-HS
Dad's Day Jamboree	Drive5 Sports Center	Overland Park, KS	3	6/17-6/17		42	4gr-HS
School's Out Hoopfest	Drive5 Sports Center	Overland Park, KS	3	6/9-6/11	\$155	65	3gr-HS
Memorial Day Magic	Drive5 Sports Center	Overland Park, KS	3	5/26-5/28	\$155	58	4gr-HS
May Baskets	Drive5 Sports Center	Overland Park, KS	3	5/19-5/21	\$155	62	3gr-HS

Mother's Day Jamboree	Drive5 Sports Center	Overland Park, KS	3	5/13-5/13	\$155	53	3gr-HS
Drive5 February Fury Tournament	Drive5 Sports Center	Overland Park, KS	3	2/20-2/22	\$155	41	2nd-8th
Drive5 In The Paint Tournament	Drive5 Sports Center	Overland Park, KS	3	2/27-3/1	\$155		2nd-8th
Drive5 March Magic Tournament	Drive5 Sports Center	Overland Park, KS	3	3/6-3/8	\$155		2nd-12th
Drive5 Midwest Challenger Tournament	Drive5 Sports Center	Overland Park, KS	3	3/13-3/15	\$155		2nd-12th
Drive5 Pot Of Gold Tournament	Drive5 Sports Center	Overland Park, KS	3	3/20-3/22	\$155		2nd-12th
Drive5 Spring Shootout Tournament	Drive5 Sports Center	Overland Park, KS	3	4/3-4/5	\$155		2nd-12th
Drive5 Series Finale Tournament	Drive5 Sports Center	Overland Park, KS	3	4/10-4/12	\$155		2nd-12th
Great American Shootout	Wichita Hoops	Bel Aire, KS	3	4/21-4/23	\$360-\$400		6th-12th
PBR/USJNs Great Plains Challenge	Wichita Hoops	Bel Aire, KS	4	4/22-4/23	\$475	38+	U14-U17
Battle of the Programs	Wichita Hoops	Bel Aire, KS	4	4/29-4/30	\$225		4th-8th
Wichita Hoops Cinco De Mayo	Wichita Hoops	Bel Aire, KS		5/6-5/7	\$395		5th-12th
Great American Shootout	Wichita Hoops	Bel Aire, KS	3	5/20-5/21	\$275-\$350	120 max	7th-12th
I35 Series Wichita	Wichita Hoops	Bel Aire, KS	4	5/20-5/21	\$600		5th-8th
Adidas Jr Gauntlet Qualifier	Wichita Hoops	Bel Aire, KS		6/3-6/4	\$300	120 max	4th-8th
Premier Invitational	Wichita Hoops	Bel Aire, KS	4	6/3-6/4	\$595	120 max	9th-12th
MAYB Summer Kickoff	Wichita Hoops	Bel Aire, KS	5	6/9-6/11	\$315	650+	1st-12th

Premier Showdown	Wichita Hoops	Bel Aire, KS	4	7/1-7/2	\$595		7th-12th
Great American Shootout	Wichita Hoops	Bel Aire, KS	3; 4	7/13-7/14	\$360; \$525		7th-12th
Mullen's High Profile Tournament	Wichita Hoops	Bel Aire, KS	5	7/14-7/16		112	U14-U17
Premier National Showcase	Wichita Hoops	Bel Aire, KS	4	7/23-7/25	\$795	180 max	7th-12th
End of the Road Showcase	Wichita Hoops	Bel Aire, KS	4	7/28-7/30	\$795	200 max	7th-12th
MAYB Boys National Championship	Wichita Hoops	Bel Aire, KS	4	8/2-8/5	\$325	850+	1st-12th
Wichita Hoops 6th Grade Invitational	Wichita Hoops	Bel Aire, KS	3	18-Feb	\$140	8	6th
MAYB Appreciation	Wichita Hoops	Bel Aire, KS	3	1/21-1/22	\$100	107	1st-12th
New Years Freeze Tournament – 2019	Cape Girardeau SportsPlex	Cape Girardeau, MO		1/6	\$100		U12-U18
SportsPlex Blast I - 2019	Cape Girardeau SportsPlex	Cape Girardeau, MO		1/13	\$100		U15-U17
SportsPlex Blast II - 2019	Cape Girardeau SportsPlex	Cape Girardeau, MO		1/14-1/15	\$100		U12-U14
SportsPlex Blast III – 2019	Cape Girardeau SportsPlex	Cape Girardeau, MO		2/25-2/26	\$100		U12-U17
SportsPlex Blast IV – 2019	Cape Girardeau SportsPlex	Cape Girardeau, MO		3/3	\$100		U13-U17
New Years Freeze Tournament - 2018	Cape Girardeau SportsPlex	Cape Girardeau, MO		1/6	\$100		U12-U18
SportsPlex Blast I - 2019	Cape Girardeau SportsPlex	Cape Girardeau, MO		1/13	\$100		U15-U17
SportsPlex Blast II - 2019	Cape Girardeau SportsPlex	Cape Girardeau, MO		1/14-1/15	\$100		U12-U14
SportsPlex Blast III - 2019	Cape Girardeau SportsPlex	Cape Girardeau, MO		2/25-2/26	\$100		U12-U17

SportsPlex Blast IV - 2018	Cape Girardeau SportsPlex	Cape Girardeau, MO		3/3	\$100		U13-U17
HOA Premier Series	New Century Fieldhouse	Gardner, KS	4	12/30	\$140	25	U17-U18
Power League Qualifier	New Century Fieldhouse	Gardner, KS	4	1/6	\$650	32	U17
Boys Preseason Warmup	Davies Volleyball Complex	Kansas City, MO	4	12/17	\$50	8	U14
HOA Premier Series	Davies Volleyball Complex	Kansas City, MO	4	12/23	\$140	12	U16-U18
HOA Premier Series	Davies Volleyball Complex	Kansas City, MO	4	12/30	\$140	15	U15
Power League Qualifier	Davies Volleyball Complex	Kansas City, MO	4	1/6	\$500	20	U12
Warm Up Tournaments w/ Landsharks	Sports Pavillion	Lawrence, KS	4	12/29	\$125	9	U12-U16
Sunflower Slam	Sports Pavillion	Lawrence, KS	4	12/30	\$140	71	U12-U17
HOA Select Series	Sports Pavillion	Lawrence, KS	4	1/6	\$140	16	U16-U18
Power League Qualifier	Sports Pavillion	Lawrence, KS	4	1/6	\$650	41	U15
ADIDAS Net Results Warm Up	Sideout Volleyball Training Facility	Nixa, MO	4	12/17	\$130	8	U15
Pac Warmup Challenge	Parkville Athletic Complex	Parkville, MO	4	12/2	\$145	10	U15
Pac Warmup Challenge II	Parkville Athletic Complex	Parkville, MO	4	12/9	\$145	16	U14-U18
Pac Warmup Challenge III	Parkville Athletic Complex	Parkville, MO	4	12/10	\$145	16	U12-U17
Pac Warmup Challenge IV	Parkville Athletic Complex	Parkville, MO	4	12/16	\$145	20	U13-U16
North Static's New Years Knockout	Parkville Athletic Complex	Parkville, MO	4	12/30	\$140	13	U13-U14
Pac Warmup Challenge V	Parkville Athletic Complex	Parkville, MO	4	1/6	\$140	20	U11-U15
Girls - U11	Lamborghini Gold Coast Athletic Center	St. Charles, MO		1/9	\$100	8	U11
Girls - U12	Lamborghini Gold Coast Athletic Center	St. Charles, MO		1/10	\$100	8	U12
Girls - U13	Lamborghini Gold Coast Athletic Center	St. Charles, MO		1/16	\$100	8	U13
Girls - U14	Lamborghini Gold Coast Athletic Center	St. Charles, MO		1/17	\$100	8	U14

Girls - U11-U14	Lamborghini Gold Coast Athletic Center	St. Charles, MO		1/23	\$100	32	U11-U14
Girls - U15	Lamborghini Gold Coast Athletic Center	St. Charles, MO		1/24	\$100	8	U15
Girls - U16	Lamborghini Gold Coast Athletic Center	St. Charles, MO		1/30	\$100	8	U16
Girls - U17	Lamborghini Gold Coast Athletic Center	St. Charles, MO		1/31	\$100	8	U17
Girls - U18	Lamborghini Gold Coast Athletic Center	St. Charles, MO		2/6	\$100	8	U18
Girls - U13-U14	Lamborghini Gold Coast Athletic Center	St. Charles, MO		2/7	\$100	8	U13-U14
Girls - U11	Lamborghini Gold Coast Athletic Center	St. Charles, MO		2/13	\$100	8	U11
Girls - U12	Lamborghini Gold Coast Athletic Center	St. Charles, MO		2/14	\$100	8	U12
Girls U15-U18	Lamborghini Gold Coast Athletic Center	St. Charles, MO		2/20	\$100	32	U15-U18
Girls - U13	Lamborghini Gold Coast Athletic Center	St. Charles, MO		2/21	\$100	8	U13
Girls - U14	Lamborghini Gold Coast Athletic Center	St. Charles, MO		2/27	\$100	8	U14
Girls - U15	Lamborghini Gold Coast Athletic Center	St. Charles, MO		2/28	\$100	8	U15
Girls - U17	Lamborghini Gold Coast Athletic Center	St. Charles, MO		3/5	\$100	12	U17
Girls - U18	Lamborghini Gold Coast Athletic Center	St. Charles, MO		3/5	\$100	12	U18
Girls - U18	Lamborghini Gold Coast Athletic Center	St. Charles, MO		3/5	\$100	12	U18
Volleyball							
HOA Premier Series	New Century Fieldhouse	Gardner, KS	4	12/30	\$140	25	U17-U18
Power League Qualifier	New Century Fieldhouse	Gardner, KS	4	1/6	\$650	32	U17

Warm Up Tournaments w/ Landsharks	Sports Pavillion	Lawrence, KS	4	12/29	\$125	9	U12-U16
Sunflower Slam	Sports Pavillion	Lawrence, KS	4	12/30	\$140	71	U12-U17
HOA Select Series	Sports Pavillion	Lawrence, KS	4	1/6	\$140	16	U16-U18
Power League Qualifier	Sports Pavillion	Lawrence, KS	4	1/6	\$650	41	U15