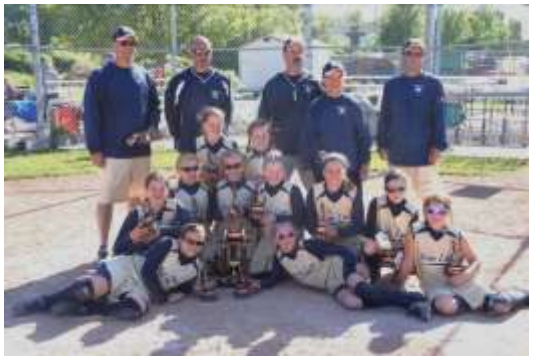

Recreational Needs Assessment Study

The South Buffalo Brownfield Opportunity Area

Presented to:

Buffalo Urban Development Corporation

Presented by:

Paradigm Economics
Wendel Companies
Spicer Group

January, 2015

This document was prepared for the Buffalo Urban Development Corporation and the City of Buffalo with financial assistance provided by the New York State Department of State Brownfield Opportunity Area Program.

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Statement of Limiting Conditions

City-Based Recreation and Economic Development Initiative
Recreation Needs Assessment

The consulting study is subject to the following limiting conditions, except as otherwise noted in the study:

1. The conclusions stated in the comprehensive analysis and market research study apply only as of the date indicated and no representation is made as to the effect of subsequent events on the study.

2. By reason of this assignment, Paradigm is not required to give testimony or be in attendance in court or any government or other hearing with reference to the study without written contractual arrangements having been made relative to such additional employment.

3. Neither all nor any part of the content of the report shall be disseminated through advertising media, public relations media, news media or any other means of communication including without limitation prospectuses, private offering memoranda, and other offering material provided to prospective investors.

4. Information, estimates and opinions contained in this report, obtained from sources outside of our office, are assumed to be reliable and may not have been independently verified.

The analyses contained in this study incorporate numerous estimates and assumptions regarding market performance, general and local business and economic conditions, the absence of material changes in the competitive environment and other matters. However, some estimates or assumptions inevitably will not materialize, and unanticipated events and circumstances may occur. Therefore, actual issues, outcomes and results experienced during the period covered by the enclosed analyses are likely to vary from our estimates, and the variations may be material.

I. INTRODUCTION

Paradigm Economics, a Buffalo-based sports, live entertainment, cultural tourism, and public assembly facility market research and facility management consulting practice, was contracted with by the Buffalo Urban Development Corporation (BUDC) in January of 2014 to work with the BUDC and its public sector project partners to identify and assess the regional indoor and outdoor recreational sports facility market and programmatic opportunities, priorities, and issues that are related to the maximization of facility operation and program execution within the South Buffalo Brownfield Opportunity Area (SBBOA).

This needs assessment project was intended to provide direction with respect to options and opportunities for attracting private sector developers to the SBBOA, for converting former industrial land within the SBBOA to productive use, to serving recreational needs of Buffalo and surrounding Western New York communities, and to generating incremental sports tourism activity so as to attract out-of-town visitors and increase measurable local economic impact.

As a Buffalo-based facilities consulting practice, Paradigm has, over the last 20 years, conducted over 100 market, feasibility, operational audit, and strategic planning studies across the country, with a significant percentage of those projects being located in New York State, and Western New York. Buffalo, Amherst, Hamburg, Niagara Falls and Jamestown are locales in which Paradigm has project experience, and First Niagara Arena, the Northtown Center at Amherst, Jamestown Savings Bank Arena, and Dwyer Ice Arena are representative venues on which Paradigm has worked and at which Paradigm has in some cases provided ongoing consultative services.

Similarly, Paradigm's project team members on this study, Wendel and Spicer Group, have extensive, significant, and relevant local and regional architectural, engineering, and construction cost project experience that, when combined with the background and experience of Paradigm, contributed to a well-qualified project team that was able to comprehensively, efficiently, and effectively address the assessment components that were articulated in the final BUDC study scope of services.

The main task areas of the project scope of services were articulated as follows:

A. Preliminary Analysis
B. Existing Conditions/Supply Analysis
C. Demand Analysis
D. Market Analysis

E. Comparables Identification and Analysis
F. Location Analysis
G. Construction Cost Estimates
H. Financial Operations Analysis
I. Economic Impact Analysis

The project had an initial projected duration of four (4) months, which was extended to a term of eight (8) months due to the identified need for conformation to both materials development and data collection realities related to the research-specific areas of front-end tasks and subtasks, as well as to late winter-early spring weather conditions impacting project team access to City of Buffalo outdoor fields and facilities capable of hosting seasonal use and play.

II. EXECUTIVE SUMMARY

Preliminary Analysis

In January of 2014, the South Buffalo Brownfield Opportunity Area's recreational needs assessment study was initiated with Paradigm Economics and its project team consisting of Wendel Companies (site analysis, existing facility conditions) and Spicer Group (construction cost estimation) engaging with an advisory committee comprised of representatives from the Buffalo Urban Development Corporation, the State of New York, Visit Buffalo Niagara/Buffalo Niagara Sports Commission, the City of Buffalo Office of Strategic Planning, and the City of Buffalo Division of Parks and Recreation.

The overarching goal of the study was to determine the demand for a new facility (or facilities) development project in the SBBOA, or elsewhere in the City, preliminarily identified as an indoor-outdoor soccer/turf field complex attractive to private sector development and ownership. The overall needs assessment was confirmed to be bifurcated in that critical audiences for the research and analysis were Visit Buffalo Niagara for sports tourism needs and development, and the City of Buffalo Division of Parks and Recreation for recreation facility maintenance and resource allocation.

Existing Conditions/Supply Analysis

Working with the Division of Parks and Recreation, the project team first confirmed and quantified the inventory of outdoor recreational assets (football, soccer, baseball, softball, little league, t-ball, basketball, tennis, track, roller hockey) within the four traditional recreation districts designated by the City (South, East, West, Olmsted) in a comprehensive supply analysis. Findings related to this inventory determined that most sports fields were in fair to good condition, and in need of common repairs including drainage improvement, regarding, weed removal, and installation of amenities (fences, benches, paths). Facility concentrations were determined to exist in North Buffalo, South Buffalo, and the East Side, and are generally lacking on the City's West Side.

The overall facilities inventory within the City is represented by a variety of owners and operators including the City, Olmsted Parks Conservancy, Buffalo Public Schools, private high schools, and colleges. The City-owned facilities inventory is supplemented by seven outdoor all-weather surface fields. Five

confirmed and potential additions to this existing City-wide inventory were determined to be D'Youville College (new outdoor turf field, opened Q3 of 2014), proposed/potential projects at Tapestry Charter School (outdoor turf field and track), English Pork Pie Company (rugby stadium, side fields, other), and developer-driven interests in both South Buffalo and the Outer Harbor. Lastly, using Division of Parks and Recreation permitting histories and program/user data, a thorough inventory of City of Buffalo recreation facility for-profit (20 groups) and not-for-profit (50 groups) facility users was conducted, so as to measure both the distribution and density of annual usage received by the City facility inventory.

Demand Analysis

The demand analysis for the SBBOA recreation needs assessment was intended to evaluate the ability of identified recreational resources within the City of Buffalo to meet current and future market demand. Census data material was utilized that determined that between the years 1940-2010, City of Buffalo population decreased by 55%, with the population density decreasing to 6,472 residents per square mile. At the same time, the recreational youth sports market in the City grew significantly since the 1960s and 1970s. The net effect on the City's recreational assets has been that in the face of a declining population, pressure on the facilities from user groups in fact has increased over historical levels, especially in the past 40+ years. This pressure has been exacerbated by a significant increase in adult recreational sports programs hosted within the City during that period.

Comparing City of Buffalo facility inventories and user demand characteristics against facility standards developed by the National parks and Recreation Association (NPRA), it was determined that user demand in Buffalo aligned with a 30-year national trend indicating demand *decreases* for basketball and tennis courts, but an *increase* in demand for baseball and softball diamonds, as well as for rectangular sports fields. Anecdotal information gathered through user group interviews confirmed that both City-based non-profit and for-profit recreational youth and adult sports programs are now constrained by a lack of field space facilities in particular.

The local soccer community in particular is attempting to address this outdoor (and indoor) field space shortage by organizing so as to advocate private sector development projects. The Division of Parks and Recreation's own experience in

allocating user permits indicates a significant need for more ball field and rectangular field space. Interviews with for-profit user groups in particular indicated a strong demand for additional indoor turf/training facilities within the market; over two dozen user groups interviewed cited the need for additional indoor facilities more centrally-located within the market as being necessary for them to more adequately serve existing programs (i.e. intercollegiate and interscholastic athletics), and to grow their travel- and premier-level training, league and tournament offering (especially soccer).

Market Analysis

The study's supply analysis indicated a pent up demand for both indoor and outdoor field sports facilities, exhibited by youth and adult recreational programs, by the for-profit travel and premier-level soccer community, by City-based colleges, and by charter and private high schools. With respect to the indoor sports field investment and development option that was identified as a primary focus of the study, a critical mass of "pay-to-play" users was readily identified as including existing outdoor adult leagues, new indoor adult leagues, City-based travel, premier, and other membership soccer programs, regional baseball and softball programs (for off-season training), and City-based collegiate and private high school programs (off-season training).

A test of this identified demand for indoor field facility access was conducted against the other nine largest counties in New York State. Within the seven-member cohort of counties having indoor turf field facilities, Erie County had the lowest density of indoor turf facilities per 100,000 population unit, with half as many facilities per population unit as Monroe County in particular. This finding supports the general premise that is implicit in the study's program representative interviews, that there is significant pressure within the local-regional sports market for greater access to indoor "off-season" facilities and turf time. Such indoor facility investment and operation is supported by demonstrated local user market characteristics including volume of existing programs, rates charged by existing facilities, volume of current utilization exhibited by existing programs, membership and program expansion goals of existing programs, and outdoor adult recreational programs that desire to provide an indoor season program offering to their current members.

The merit of such a facility development opportunity and business operation option includes quality of life improvement for City of Buffalo and regional

residents, contribution to the overall marketability of the City of Buffalo, a financially-sustainable business operation that should not require private sector investment or subsidy, and economic impact through both business operation and generation of incremental retail traffic and spending by users.

Comparables Identification and Analysis

An attempt was made by the Paradigm project team to identify contemporary industry standards for indoor facility design, operation, ownership, and development. Key findings in this analysis included economical design programs and use of lower-cost exterior and interior materials, multi-field configurations to allow for program flexibility and maximization of rental revenues, inclusion of basic retail (i.e food service, equipment sales) components, a high incidence of private sector investment, ownership and operation, exhibited financial sustainability through facility operations, and user-promoted and supported facility development and operation.

A comparables cohort of New York State metropolitan statistical areas (MSAs) was identified and assessed, to determine the degree to which the contemporary industry standards that were identified earlier in the section were in evidence in other NYS markets. The inventory of indoor facilities throughout the state includes converted tennis centers, inflatable sports domes (or “bubbles”), and built-to-suit buildings, with newer metal buildings and metal buildings in general being the dominant facility type. Many buildings have suburban locations, and city-based facilities tend to be located outside of the urban center or core.

Because of both its proximity to Buffalo and its high indoor turf field facility density, the Monroe County facility inventory was scrutinized in detail. Themes represented by these facilities include private ownership and operation, multiple facility ownership, multi-surface design and layout, a variety of field dimensions, and inclusion of some non-field sports (i.e. basketball court) spaces.

Location Analysis

Based on the determination of a potential new facility type that was identified in this study’s market supply and demand analysis, a preliminary location analysis was conducted that considered potential geographic footprints within the City of Buffalo that might serve as host sites for the indoor-outdoor turf field facility. This location analysis included three main components: development of criteria for optimal project location; creation of a comparative analysis of primary and

secondary locations based on evaluation criteria; and evaluation of sites within the South Buffalo BOA against the location criteria.

The location criteria were applied against 11 preliminary target locations provided to the project team by the BUDC. These locations were identified based on location and available acreage. No effort was made at this time to determine their availability. This set of location options happened to include seven (7) geographic footprints that were located in one of the four current Brownfield Opportunity Areas within the City of Buffalo. This location set and the BOA within which each location resides is provided as follows:

1. 90 Hopkins Street – South Buffalo BOA;
2. Outer Harbor – Buffalo Harbor BOA;
3. Elk Street – Buffalo River BOA;
4. Emerson Young Park – Buffalo Harbor BOA;
5. Tee-to-Green property – Tonawanda Corridor BOA;
6. Black Rock Yard – Tonawanda Corridor BOA;
7. 1070 Seneca Street;
8. Kensington Heights;
9. Buffalo Forge;
10. Village Farms/Hydroponics/English Pork Pie Company; and
11. American Axle.

Profiles for each of these 11 locations were developed that included geographic location detail, access detail, contextual detail (i.e. proximity to schools, retail and entertainment, and parks and recreation), and a placement map indicating location within the City of Buffalo footprint.

A comparative analysis of all 11 preliminary target locations against the primary and secondary location criteria indicated that with respect to the key primary location criteria of massing ability of necessary acreage, seven of the 11 target locations (Outer Harbor, Elk Street, Tee-to-Green, Black Rock Yard, 1070 Seneca Street, Kensington Heights, and Village Farms) have enough of a footprint so as to allow for both initial facility development, as well as expandability of the indoor-outdoor complex should marketability and operating characteristics of a new facility indicate that business operation expansion is appropriate.

Construction Cost Estimates

Based on the demand, market, and comparables findings articulated in earlier sections of this study, the Paradigm study group endeavored to generate a set of preliminary construction cost estimates based on the indoor-outdoor turf field complex facility type that was elevated to priority status within the new facility type option evaluation.

Based on predominant user group needs, recommendations, and requirements that were generated through the market supply and demand sections interview process, a set of *preliminary base case facility parameters* were developed by Spicer Group that reflected the indoor, outdoor, and support space construction specifications that would support a conservative construction scenario within the indoor-outdoor turf field facility type. These parameters were transferred to Spicer Group for construction cost estimating purposes, and are articulated as follows:

- One (1) 330'x210' indoor turf field surface;
- Two (2) 180'x300' outdoor field surfaces;
- Two (2) 240'x360' outdoor field surfaces;
- Paved parking for 200 vehicles (@325 SF/space);
- Interior support space that includes retail, administration, food service, lavatories, and storage;
- Adequate interior circulation space;
- Basic Butler building-type metal clad structure and materials;
- HVAC system that allows for year-round utilization of indoor spaces;
- 50' ceiling height over indoor playing surface;
- Security fencing around the footprint perimeter.

The total construction cost estimate, which includes soft costs, site preparation, some non-fixed equipment, bonding costs, insurance, and a 15% contingency, overhead, and profit, was determined to total $10,498,678. This construction cost does not include cost of land.

The 21-acre footprint includes approximately 13 acres for building, parking lots, and outdoor fields, and eight additional acres for outdoor circulation, landscaping, and auxiliary space.

Financial Operations Analysis

Based on the design program selected for the proposed indoor-outdoor turf and field sport center (one full-sized indoor turf field, four outdoor turf and natural grass fields), a set of assumptions were generated that provided the basis for a preliminary financial performance analysis for the proposed facility operation. A summary of these key characteristics included but was not limited to the following:

- A private legal structure and operation (either for-profit or not-for-profit) is preferred;
- The business operation essentially has a 6-month revenue period (November-April); and
- The facility will be required to internally develop, market, and administer a variety of leagues and programs including but not limited to youth and adult soccer, flag football, and similar.

Other key characteristics for the cash flow model were preliminarily selected for illustrative purposes, and are described as follows:

- Indoor utilization reflects a 90% utilization of available prime time hours;
- Not-for-profit legal status has been selected and applied, which allows for solicitation of grants, donations, and pledges;
- A management company line item is included in the expense budget, which reflects the opportunity for experienced indoor/outdoor recreation facility operators to oversee day-to-day facility operation for ownership on a contract basis;
- Indoor field utilization is expected to include a combination of league and tournament play (run by the facility) and straight rentals by outside user groups. Also expected is variable utilization volume by sports type; and
- An 80% loan over 25 years on a construction budget of $10,498,678 at 6.5% has been factored in as an expense.

The preliminary cash flow model included revenues from indoor and outdoor field utilization (“Total Usage Revenue”), as well as non-rental revenues that include concessions revenues (net), field sponsorship rights, revenues from grants, donations, and pledges, and sponsorship package revenues (“Ancillary Revenues”).

The expense side of the cash flow model includes expense line items such as payroll (facility management, sports coordinators), utilities, management company fee, telephone/internet, insurance, building/grounds maintenance, equipment replacement fund, office expenses and supplies, contract services, legal and accounting fees, and marketing.

Total revenues ($1,174,098) were aligned against total expenses ($1,099,172) to generate a net cash flow figure of $74,926. This net cash flow figure represents the cash that is available to the facility owner to make loan/mortgage payments that are incurred to purchase property and for building development/construction. For purposes of this financial performance modeling exercise, those payment obligations have not been estimated or included as line items in the expense side of the cash flow model.

Economic Impact Analysis

The Paradigm project team utilized estimations of projected facility construction cost and facility financial performance to determine an estimation of economic impact generated by both the single event (construction) and ongoing annual activity (financial performance). In this effort, the Minnesota IMPLAN economic impact model was utilized in conjunction with current Bureau of Economic Analysis (BEA) market data for Erie County.

The economic impact generated within Erie County by the proposed *indoor facility construction* is summarized as follows:

Impact Type	Employment	Labor Income	Output
Direct Effect	66.8	$3,196,756	$7,417,760
Indirect Effect	13.5	$772,878	$1,964,339
Induced Effect	21.0	$896,164	$2,651,473
Total Effect	**101.3**	**$4,865,797**	**$12,033,572**

Estimated economic impact for *indoor facility operations* from the IMPLAN model based on an annual revenue projection of $1,174,098 is as follows:

Impact Type	Employment	Labor Income	Output
Direct Effect	6.0	$146,500	$1,174,098
Indirect Effect	2.1	$110,093	$314,420
Induced Effect	1.4	$57,729	$170,796
Total Effect	9.4	$317,322	$1,659,313

III. PRELIMINARY ANALYSIS

On January 21, a kick-off meeting was held at the BUDC offices with members of the project's advisory committee. The purpose of the meeting was to confirm goals and objectives for the project, to identify what materials and contact information existed within the advisory committee that could be helpful to and collected by the Paradigm project team, and to discuss interactively the overall project process and context. Participants at that meeting were of two groups as follows:

SBBOA project advisory committee:

Pete Cammarata (BUDC);

Mike Even (Visit Buffalo Niagara/Buffalo Niagara Sports Commission);

Becky Gandour (City of Buffalo);

Dave Stebbins (BUDC);

Dennis Sutton (City of Buffalo).

(Not in attendance – Chris Bauer, NYS, and Andy Rabb, City of Buffalo Division of Parks and Recreation)

Paradigm Economics project team:

Michael Bogucki (Paradigm);

Dean Gowen (Wendel).

It was confirmed that the core group for the advisory committee is Chris Bauer, Mike Even, and Andy Rabb, with BUDC participants acting as the facilitating entity.

Regularly scheduled monthly meetings were confirmed, to facilitate information sharing, interactivity, and a consistent feedback loop regarding work in progress and contact and information brainstorming.

It was confirmed that City of Buffalo Strategic Planning, City of Buffalo Division of Parks and Recreation, and Visit Buffalo Niagara participants were key to the

project with respect to definition of project roles and outcomes expectations. The SBBOA was confirmed as the tacit target geography for study, but it was also confirmed that the assessment was to have a City-wide focus, especially with respect to an existing conditions and supply analysis specific to City of Buffalo recreation facility assets.

The overarching question to be answered by the assessment effort was identified as follows:

"Is the demand for a new facility (or facilities) to be located somewhere in the City limits real, is the facility type able to be preliminarily identified as an indoor-outdoor sports complex of some defined size and purpose and if so, can private sector investment and ownership criteria be identified so as to allow for the advocating by the public sector of such a project?"

The three key phases of the project were reiterated and confirmed to be (1) inventory/supply/physical analysis; (2) demand analysis; and (3) economic analysis.

It was also stressed that the assessment needed to be bifurcated, that is, that it needed to assess a sports tourism component (for VBN), and a community recreation component (for the City of Buffalo).

For VBN specifically, sports to target were identified as baseball, softball, football, soccer, lacrosse, field hockey, rugby, track and field (all outdoor), as well as gymnastics, wrestling, indoor track, basketball, cheer, and dance (all indoor). Fresh water sports were also determined to be a consideration, given the proximity of the SBBOA to fresh water access.

It was determined and confirmed that VBN would be the best repository to access for sports tourism histories, sports tourism business development efforts and interests, and "lost business" information. Additionally, the City of Buffalo Department of Parks and Recreation was confirmed as being the office in which historical documentation resided in the areas of City of Buffalo field and facility permitting, City of Buffalo recreation asset inventory information, and historical facility/asset use information.

IV. EXISTING CONDITIONS/SUPPLY ANALYSIS

Task One in the SBBOA recreation needs assessment study entailed the identification and inventorying of recreational resources currently existing within the study area. This study area was not restricted to the SBBOA area and neighborhoods proper, but encompassed the entire inventory of recreational assets within the City limits.

While the inventory exercise focused primarily on City of Buffalo Division of Parks and Recreation assets, the effort also encompassed non-City recreational assets within the City, which either theoretically contribute to the overall inventory of available recreational assets, or in fact contribute in practice based on their known availability to City and other user groups.

City of Buffalo Division of Parks and Recreation Recreational Facilities Inventory

Materials available to the Paradigm project team through COB Parks and Recreation allowed for identification and a distribution analysis of existing COB recreation assets. COB recreational assets are identified based on the department's maintenance districts: South, East, West, and Olmsted. Facility types captured within these three distinct geographic districts and the Olmsted parks subset are identified as follows:

Football fields (game, practice);

Soccer fields (game, practice, with and without goal frames);

Hardball fields (baseball);

Softball fields;

Little League fields;

T-ball fields;

Basketball courts (full and half);

Tennis courts; and

Outdoor tracks.

The provided parks and recreation materials were confirmed for completeness by the project team, and then manipulated so as to present all COB recreational facility assets by district, and with subtotals of facility type by district and totals by facility type for the City. This information is presented in Table One.

TABLE ONE – CITY OF BUFFALO RECREATIONAL FACILITIES DISTRIBUTION

SOUTH DISTRICT	**Football Field**	**Soccer Field**	**Hardball**	**Softball**	**Little League**	**T-Ball**	**B'ball**	**Tennis**	**Track**	**Roller Hockey**
JFK Park	1	2		1			3	4		
Willert							2			
Spring (Wende)							2			
Conway	1			2						
Mullen							1			
Collins							1			
Lanigan		1 (prac)					1.5			
Houghton	1	1 (prac)	1	1			2	1		2
Hillary	1	2					1.5			
Mungovan		1							1	
Boone				1			1			
Mulroy	1									
Okell	1		2	1	1	1	1			
Tifft	1	1		1						
Durant		1 (small)					1			
Franczck	1	1 (prac)		2			1 full, 2 half			1
Hennepin							1	4		
Subtotal =	**8**	**10**	**3**	**9**	**1**	**1**	**21**	**9**	**1**	**3**
EAST DISTRICT										
McCarthy	1	1	2	1	2		3	2		
Manhattan	1	1 (prac)					1			
Dewey		1 (prac)		1	1		3			
Trinidad	1 (short)						2			
Glenny	1			2			2			
Roosevelt	1	1 (prac)					2	1		
Kingsley		1 (prac)				1	2			
Masten				1			4			
Ed Dawson							1			
Nowak		1 (prac)								
Emerson	2					1	2	2		
Walden/Scaj	1	1 (prac)	1		2					
Schiller	1	1 (prac)					2			
Lang Weber	1	1 (prac)				1	1			
Lincoln						1	1			
Box/Glennwd							1			
Fr. Eckridge							3			
Sperry				1			3			
Bailey/Moore	1									
Woodlawn (Perkins)		1 (prac)				1	3			
Subtotal =	**11**	**10**	**3**	**6**	**5**	**5**	**36**	**5**		
WEST DISTRICT										
Waterfront	1	1					1	3		
Massachusetts		1 small prac					1			
Allison							2			
LaSalle	1	2		3	3	1				
Peter St.							1			
JH Williams		2					1.5			
Shoshone			1	2	2	1	2			
Subtotal =	**2**	**6**	**1**	**5**	**5**	**2**	**8.5**	**3**		

OLMSTED DISTRICT										
Delaware	1	5	2	1			4	17		
Riverside	1		1	1	2	1	2	2		
MLK							2	4		
Front		1						2		
Cazenovia	1	3	2	2			2	4		
South Park				2						
Subtotal =	**3**	**9**	**5**	**6**	**2**	**1**	**10**	**29**		
Total – All Districts=	**24**	**35**	**12**	**26**	**13**	**9**	**75.5**	**46**	**1**	**6**

Source: City of Buffalo Division of Parks and Recreation

Table One indicates that the City has an overall inventory of outdoor recreational assets (including practice fields) as follows:

Football fields	24
Soccer fields	35
Hardball fields	12
Softball fields	26
Little league fields	13
T-ball fields	9
Basketball courts	75.5
Tennis courts	47
Outdoor track	1
Roller hockey	6

This inventory includes facilities owned, maintained and permitted by the City. The Johnny B. Wiley sports complex is owned by the City, but is maintained and booked by Buffalo Public Schools under a management contract with the City. That complex includes a hardball field, an outdoor track, and a turf field that accommodates football, soccer, and lacrosse.

Supply Analysis Summary

As a component of the conditions/supply analysis, the project team identified proposed facilities in addition to the total number of existing City of Buffalo assets. Methodology included site visits and subjective rating, geographic spatial data utilizing ArcGIS, aerial imaging and interviews. The analysis included the geographic distribution, condition and use of facilities based on 2013 reservation data. A graphical representation of this asset analysis is provided in the report Appendix.

Based on our review of the City of Buffalo recreation facility inventory included within this study, five key findings were identified as follows:

1. Most sports fields are in fair to good condition; numerous City of Buffalo operated courts are currently in the process of being renovated. Common repairs needed include drainage improvement, re-grading, weed removal and park amenities such as fences, benches and paths;

2. Facilities are concentrated in areas of South Buffalo, along the East Side, and parts of North Buffalo. The west side is generally lacking recreation facilities;

3. The East Parks District accounts for over 45% of all public (public = City of Buffalo/Olmsted Parks Conservancy operated) football fields and basketball courts;

4. Current recreation facilities are owned/operated by a variety of actors: private developers, City of Buffalo Parks Dept., Olmsted Parks Conservancy, public schools and private schools; and

5. Climate is a constraint on the existing field supply usability as there is only one indoor soccer field in Buffalo (Tosh Collins Community Center).

Non-City of Buffalo Recreational Facility Inventory

In addition to City of Buffalo recreational facility assets, there are within the City limits a number of outdoor and indoor sports-rec facilities to which the general public, typically in the form of organized teams, leagues, and similar user groups, has access. This access is typically on a rental basis, but use is not exclusive to a rental arrangement in all cases, as private owners sometimes offer free or discounted use to groups with which they have affiliated or preferential relationships.

Table Two indicates the inventory of non-City recreational assets currently available to outside user groups. This includes facilities owned, maintained, and permitted by City-based private high schools, colleges, and Buffalo Public Schools primarily. The table generally follows the district designations of Table One, so as to make comparison of public vs. private inventories as well as to make possible aggregation of all facilities in a geographic district by type.

TABLE TWO – NON-CITY OF BUFFALO RECREATIONAL FACILITIES DISTRIBUTION

SOUTH DISTRICT	Football Field	Soccer Field	Hardball	Softball	Little League	T-Ball	B'ball	Tennis	Track
Pirce Field at Mulroy Park	**1**	**1**							
Subtotal =	**1**	**1**	**0**	**0**	**0**	**0**	**0**	**0**	**0**
EAST DISTRICT									
All-High Stadium (BPS)	1	1							1
Subtotal =	**1**	**1**	**0**	**0**	**0**	**0**	**0**	**0**	**1**
WEST DISTRICT									
Riverside High School (BPS)	1	1							1
Coyer Field (Buff State)	1	1							1
Demske Complex (Canisius)	1	1							
Canisius H.S.	1	1							
Nichols School	1	3							
Subtotal =	**5**	**7**	**0**	**0**	**0**	**0**	**0**	**0**	**2**
OLMSTED DISTRICT									
Subtotal =	**0**	**0**	**0**	**0**	**0**	**0**	**0**	**0**	**0**
Total – All Districts =	**7**	**7**	**0**	**0**	**0**	**0**	**0**	**0**	**3**

Source: City of Buffalo Division of Parks and Recreation

Table Two indicates that non-City facility owners theoretically contribute to the overall available football field (which typically allow for soccer, lacrosse and field hockey play as well), soccer, and track and field inventory within the City. However, there are conditions typically associated with privately-owned and public non-City facilities, and which are in place at this set of non-City facilities that can be articulated as follows:

- Unlike City of Buffalo facilities, which favor youth groups on its hierarchy of permitting, privately-owned facilities typically identify their own internal teams and programs as the absolute scheduling priority;

- For college facilities in particular, intercollegiate athletics, intramurals, and recreational use by campus constituents are scheduling priorities ahead of most if not all outside user groups;

- Unlike City of Buffalo facilities, privately-owned facilities typically charge *all* user groups a rental fee for use of their facilities, including *both* youth and adult programs; and

- Buffalo Public School facilities must first accommodate its interscholastic sports programs at its available facilities before considering permitting to outside groups.

Potential Additions to City of Buffalo Recreational Facility Inventory

In addition to existing City of Buffalo and non-City of Buffalo recreational facilities within the City limits, there are a number of recreational facility projects that are either underway or proposed that will and may, respectively, impact the overall recreational facility inventory within the City in the near term or otherwise. Paradigm has endeavored to identify and assess the status of these projects so as to determine the relative impact that each might ultimately have on overall facility availability within the City. Descriptions of actual and potential projects of this type that have been identified to-date are provided as follows:

- ***D'Youville College (new outdoor turf field):*** Construction recently completed on Porter Avenue. All-weather surface has a configuration that accommodates soccer, field hockey, lacrosse, football, as well as softball and baseball. Facility will not be available to outside groups for first full year of operation, but DYV athletics intention is to make facility available to outside groups on a rental basis thereafter.

- ***Tapestry Charter School (outdoor turf field and track):*** Combination of components is still under development, proposed components have

included all-weather turf surface (football, basketball, soccer, field hockey), 8-lane track encircling field, and seasonal air structures (domes) covering the all-weather surface in late fall-winter-early spring.

- ***English Pork Pie Company (rugby stadium, side fields, indoor fieldhouse):*** Proposed for outside space behind EPPC corporate location at 1176 South Park Avenue. Ownership indicates an intention to privately-finance development, primarily to provide a centralized and rugby-centric location for regional rugby play, as well as a secondary purpose of providing outdoor field space for the local soccer community. This intent would require acquisition by EPPC of contiguous land currently owned by the City, and the ability of EPPC to do so is uncertain at this time.

- ***Lee Street Property (outdoor surfaces for soccer, rugby, lacrosse, beach volleyball):*** 18 total acres, including existing structures, envisioned as potential live entertainment, retail and outdoor recreation complex to complement contiguous projects and business operations at Larkinville, Railroad Museum, Silo City, etc.

- ***Outer Harbor (multiple development proposals):*** Projects have been proposed that are baseball-centric and multi-function (combination of retail, participative sports, live entertainment, other), as well as new Bills stadium-centric. Proposed as privately-developed, owned, and operated projects most likely, they are all speculative at present, likely require 100-150+ acres of development, propose to have sports facility components that might lend themselves to “sports tourism” opportunities that could align with VBN interests, and would likely require rental payments for access by outside groups and event.

On a probability scale, the DYC project was completed in Q3 of 2014, with availability to outside local user groups beginning perhaps in 2015-2016.

Tapestry Charter School has had a deliberate process in place since 2013 to both plan and fundraise for an 8+-acre project on land that it currently owns on Great Arrow Avenue. That said, if a development plan and funding was in place by fall of 2014, it is likely that facilities could not be online before spring of 2016, based on typical construction timelines that consider design efforts, materials purchase, and seasonality constraints.

The outer harbor proposals that have some degree of potential event, program, and/or recreational sports capability are expansive in their scopes, and would qualify as major development projects that would require significant funding, design, public-private collaboration, and construction efforts. As a result, the green-lighting of one or more of these projects would certainly be both intricate and deliberate. Therefore, integrating any aspect of their proposed component strategy is likely not advisable for planning for recreation program access and use in particular. That said, they do have relevance for potential VBN sports tourism business development efforts, and any eventual development component decisions that come to pass with respect to one or more of them.

Task Two in the SBBOA recreation needs assessment study entailed the determination and codification of the *current utilization* of existing recreational resources currently existing within the study area.

City of Buffalo Division of Parks and Recreation files and records, especially annual permitting logs, were utilized to create a comprehensive summary of users of City outdoor facilities, separated into for-profit and not-for-profit user groups. These summaries are provided in Table Three and Table Four, respectively.

TABLE THREE – FOR-PROFIT FACILITY USERS

Name	Sport(s)	District(s)	Park(s)
Buffalo Social Club	Softball, soccer	S,W,O	JFK, Franczyk, LaSalle, Front, Delaware, Schiller, Walden
M/ilesports	Softball, kickball, flag football, soccer	S,E,W,O	Conway, Tifft, Glenny, LaSalle, Delaware
South Buffalo Softball	Softball	S,O	Houghton, Caz, Franczyk
Queen City Softball	Softball	W	LaSalle
Game On	Softball, baseball, flag football	O,E,S	South Park, Glenny, Boone, Del, Houghton, Franczyk
Buffalo Wings	Baseball	O	Caz, Delaware
Old First Ward	Softball	S	Conway
Friendly Friday	Softball	S	Conway
Buffalo Rugby Club	Rugby	O	Delaware
Buffalo Women's Rugby	Rugby	O	Delaware
USA Ultimate Frisbee	Frisbee		
WAKA	Kickball	O	Delaware
New Era 14U	Baseball	O	Delaware
Soccer Shots	Soccer	O	Delaware, South Park
Buffalo Niagara Tennis	Tennis	W,O	Riverside, Delaware
New Era Tourney	Baseball	O,E	Caz, McCarthy, Delaware
WNYFFL	Flag football	S	JFK
Go Flingo	Kickball	W	LaSalle
Tuesday Women's Night	Volleyball	S	Houghton
Old Neighborhood	Softball	S	Conway

Source: City of Buffalo Division of Parks and Recreation

Table Three indicates that at least 20 for-profit recreational sport organizations utilize City of Buffalo Recreational facilities on an annual basis in order to run their respective programs. These for-profits are almost exclusively for adult leagues, and represent men's, women's, and coed sports and leagues. The key users based on annual volume – Buffalo Social Club, M/ilesports, and Game On – provide multiple participative sports opportunities, and therefore use a wider variety of City field types and park locations. Other heavy users such as South Buffalo Softball are single-sport, but utilize multiple park locations as well due to their sizable membership.

The main calendar period for these sports and users is the May-August timeframe, with some activity taking place in "shoulder" seasons of April and September.

TABLE FOUR – NOT-FOR-PROFIT FACILITY USERS

Name	Sport(s)	District(s)	Park(s)
MUNY MSPL	Baseball	E,O	Walden/Scaj., Delaware
Nardin	Tennis	O	Delaware
Canisius H.S.	Baseball	O	Delaware
Bishop Timon	Baseball, football, lacrosse	O,S	Delaware, Mulroy, Tifft
Mt. Mercy	Softball	O	Caz
South Buffalo Little League	Baseball	S	Okell
Kensington Little League	Baseball	E	McCarthy
NICYO	Baseball	E	Walden/Scaj.
West Side Little League	Baseball	W	LaSalle
Hertel N. Park Little League	Baseball	W	Shoshone
Riverrock Little League	Baseball	O	Riverside
BPS	Tennis, baseball, football, softball	O,E,W	Delaware, MLK, Riverside, Caz, Dewey, Masten, Waterfront, Riverside, Shoshone, LaSalle, Houghton, JFK
Maritime Charter	Baseball	O	Delaware
Delaware Soccer Club	Soccer	O,W,E	Delaware, JH Williams, McCarthy
Monsignior Nash	Softball	O	Caz
W. Side Int'l Soccer	Soccer	W	Front, Massachusetts
AAABA	Baseball	O	Delaware
Bflo Legion Post 64	Baseball	O	Delaware
Jr. Bisons CEBA	Baseball	O	Caz, Delaware
S. Buffalo Soccer	Soccer	O	Delaware
PAL	Basketball, baseball, soccer, tennis	W,O	Riverside, Delaware, Caz, Houghton
Ballin' for Breast Cancer	Basketball	O	Delaware
S. District Summer Camp	Basketball	O	Caz
S. Buffalo Football	Football	S	Hillary
Buffalo ravens	Football	E	Glenny
Redskins	Football	W	Waterfront
Cowboys	Football	E	JB Wiley
Buffalo Vets	Football	E	Manhattan
N. Buffalo Jr. Athletics	Football	E	McCarthy
Hurricanes	Football	S	Houghton
West Side Football	Football	W	LaSalle
Stingrays	Football	S	Okell
Blackrock Riverside	Football	W	Riverside
Wolverines	Football	E	Schiller
Buffalo Raiders	Football	E	Emerson

GC Cowboys	Football	E	Trinidad
Lovejoy Lions	Football	E	Bailey Moreland
Steelers	Football	E	Walden/Scaj.
JFK Giants	Football	S	JFK
Redskins	Football	E	Kingsley
Falcons	Football	S,E	Franczyk, Lang Weber
Jets	Football	S,E	Mungavin, Nowak
JFK Flag Football	Flag football	E	McCarthy, Manhattan
Medaille	Softball	Ee	McCarthy
Sacred Heart Academy	Softball	W	Shoshone
Notre Dame	Baseball, softball	S	Conway
Buffalo Soccer Club	Soccer	W	Waterfront
NABA	Baseball	W	LaSalle
S. Buffalo Celtics	Football	S	Tifft
Diocese of Bflo CYO	Softball	S	Houghton

Source: City of Buffalo Division of Parks and Recreation

The not-for-profit cohort includes 50 user groups. Two of the largest users, Buffalo Public Schools and PAL, are multi-sport users and therefore utilize a variety of facilities throughout the City districts. Other high-volume users such as Delaware Soccer Club are single-sport, but make high use of multiple facilities, in the case of DSC Olmsted Park facilities (Delaware Park), as well as McCarthy and J.H. Williams. Seasonal neighborhood youth sports programs are significantly represented, and typically utilize facilities located within their own neighborhoods.

A number of private city-based high schools make significant use of City facilities, as they typically do not have facilities of their own for outdoor fall or spring sports.

V. DEMAND ANALYSIS

The demand analysis for the SBBOA recreation needs assessment was intended to evaluate the ability of identified recreational resources within the City of Buffalo to meet current and future market demand.

For purposes of this analysis, the inventory of City-owned recreation facilities was the primary focus, as the identified privately-owned facilities comprise a relatively small and frequently hard-to-access subset of the overall recreation facility inventory within the City of Buffalo geography.

Based on the current City of Buffalo recreation utilization analysis generated in the previous section, the primary sources of "demand" were determined to be a combination of not-for-profit programs, primarily for resident youth populations, and for-profit programs that generally cater to adult rec sport participants.

In addition to City of Buffalo Department of Parks and Recreation anecdotal information that speaks to current and projected demand trends, two key areas of quantifiable information that help to focus on the relationship between population and recreation resources are historical City of Buffalo population characteristics, and recreation industry baselines and standards.

City of Buffalo Population Characteristics

The City of Buffalo Office of Strategic Planning provided to the study an in-house data set of City of Buffalo census data reaching back to 1940. This data was utilized to identify and evaluate a 70-year history of population changes, as well as calculations of population density per square mile and population density by City of Buffalo census tracts. These subsets of population data are exhibited in Table Five.

TABLE FIVE – CITY OF BUFFALO 70-YEAR POPULATION AND DENSITY TRENDS

	1940	1950	1960	1970	1980	1990	2000	2010
Total Pop.	575,901	580,132	532,527	462,655	357,800	328,320	292,648	261,310
Density/Sq. Mi.	13,993	14,096	12,939	11,249	8,695	8,083	7,205	6,472

Source: City of Buffalo Office of Strategic Planning, U.S. Census

Table Five indicates that over the period 1940-2010, the City of Buffalo experienced a population decline of 314,591, or 55%. It is the project's

understanding that the City's recreational asset inventory remained relatively stable during that period, and in fact became more formalized in some instances, and has most recently been added to (i.e. McCarthy Park). This, to serve a City population less than half the size in 2010 than it was 3+ generations previous.

Another look at this data deals with population density. Whereas the population density per square mile in the City was 13,993 in 1940, due to consistently falling population numbers over the following 70-year period, the 2010 population density was calculated to be 6,472 residents per square mile.

Changes to the Traditional and Historic Youth Sports and Adult Recreation Markets

The other side of this particular data assessment considers the change in recreational programming that has taken place over that same period. Recreational sports for the youth market specifically have grown since the 1960s and 1970s; youth football and soccer especially have gained in popularity, and require green field space that heretofore was not required of City parks. Both non-profit and for-profit organizations have stepped in to provide programming options and opportunities in baseball, softball, football, and soccer for the youth market.

The net effect for the City is that while the population has decreased by half since 1940, additions to the overall inventory of popular youth sports, supported by the development of youth sports programs within the City to satisfy the program side of the overall recreational sports program equation, have served to actually increase the pressure on finite City of Buffalo Division of Parks and Recreation resources, some of which have been both in place and relatively unchanged for up to 100 years, to provide space and time for interested user groups based primarily within the City of Buffalo.

In addition to this youth sports program increase, the trend of increased activity in adult recreational sports further complicates the ability of the City to satisfy overall user-program demand. For-profit enterprises have seized the opportunity to provide adult recreation programs in the form of leagues primarily to satisfy not only traditional adult male rec sport demand in the areas of baseball, softball, and basketball, but also the now-institutionalized prevalence of both women's-only

and coed sports and leagues, including relatively new sports such as soccer, flag football, ultimate Frisbee, volleyball, lacrosse, and others.

Recreation Industry Standards

A way of measuring the adequacy of the City of Buffalo recreation asset inventory is to identify recreation industry standards that allow for both indexing and comparison to an identifiable comparable metropolitan area cohort.

Both The Trust for Public Land and the National Recreation and Parks Association (NRPA) proved to be valuable sources of information in the areas of metropolitan area recreation resource databases as well as facility prevalence per unit of population.

A survey of 100 U.S. cities conducted by The Trust for Public Land produced information on the prevalence of ball diamonds, basketball hoops, tennis courts, public golf courses, and ice skating rinks per 10,000 residents. High, low and median calculations were extracted from this 100-city deep database by Paradigm, to show the relative position of Buffalo against other U.S. markets exhibiting high and low prevalence, and against the median for all 100 markets. This comparison is provided in Table Six below.

TABLE SIX – SELECT FACILITIES PER 10,000 RESIDENTS – BASELINES

Facility	High	Low	Median	Buffalo
Ball Diamonds	5.3 (St. Paul)	0.0 (Laredo)	1.5	2.4
Basketball Hoops	10.7 (Madison)	0.0 (Miami)	2.2	6.4
Tennis Courts	6.0 (Norfolk)	0.1 (Boise)	1.7	2.1
Public Golf Courses (1)	1.7 (Honolulu)	0.0 (Gilbert AZ)	0.75	1.5
Ice Skating Rinks (2)	12.2 (Minneapolis)	0.0 (Tucson)	0.0	1.5

Source: The Trust for Public Land
(1) Per 100,000 residents, moderate-to-high density cities only;
(2) Per 100,000 residents, only five cities over 1.5.

Table Six would indicate that the City of Buffalo is above the median with respect to facilities per 10,000 in the areas of ball diamonds, basketball hoops, and tennis courts, three key facility types in the SBBOA needs assessment.

Another analysis to be conducted using this data is the comparing of the City of Buffalo against a cohort of other cities deemed to be comparable to Buffalo based on age, geographic location, and to a lesser extent, population size. This comparison is provided in Table Seven.

TABLE SEVEN – FACILITIES PER 10,000 RESIDENTS – BUFFALO AND COHORT

	Population	Ball Diamonds	Basketball Hoops	Tennis Courts
Columbus (OH)	809,798	1.1	1.9	1.7
Detroit	701,475	3.1	3.0	1.7
Baltimore	621,342	3.3	1.6	1.8
Milwaukee	598,916	0.9	2.3	1.3
Minneapolis	392,880	5.0	1.7	4.6
Cincinnati	390,928	3.6	6.9	4.2
Cleveland	318,172	3.6	5.9	2.8
Pittsburgh	306,211	4.0	3.5	2.8
St. Paul	290,770	5.3	1.3	2.6
Toledo	284,012	n.a.	n.a.	n.a.
Newark	277,727	1.4	1.5	1.6
Buffalo	***259,384***	***2.4***	***6.4***	***2.1***
Jersey City	254,441	0.4	0.8	0.2

Source: The Trust for Public Land

Table Seven indicates that with respect to the other 12 cities included in the cohort, Buffalo is ranked 8th in ball diamonds per 10,000, 3rd in basketball hoops, and 6th in tennis courts.

The NRPA data takes the position of suggesting what volume of facilities *should* be available to a local population. Access to "suggested development standard" information from the NRPA for the years 1983 and 2013 provide an opportunity to not only see the standards established for 2013, but the relative change by facility by type over the 30-year period in between the years. This comparison is provided in Table Eight.

TABLE EIGHT – NPRA PARK FACILITY STANDARDS

	1983 – NPRA "Suggested Facility Development Standards"	2013 – NPRA "Median Jurisdiction Population Per Facility"
Basketball Court (outdoor)	1 per 5,000	1 per 6,644
Diamond Field (baseball, softball)	1 per 5,000	1 per 3,403
Rectangular Field (football, soccer)	1 per 20,000/1 per 10,000	1 per 4,242
Tennis Court (outdoor)	1 per 2,000	1 per 4,283

Source: "Recreation, Park and Open Space Standards and Guidelines", 1983 (NRPA); "2014 Parks and Recreation National Database Report" (NRPA)

Table Eight would indicate that the *suggested* requirement for basketball courts per population unit decreased by 33% over the 20-year period, as did the need for tennis courts (114% decrease). Conversely, the suggested requirement for baseball and softball diamonds per population increased by 32% during the period, while rectangular field requirements increased by 471%.These figures coincide in particular with pressure felt by the City of Buffalo parks-rec

department with respect to anecdotal demand for time by both youth and adult leagues at City-run baseball, softball, football, and soccer fields.

It should be noted that the NRPA put out an update in 1995 that focuses on a level of service (LOS) approach to determining park and recreational needs, as opposed to the traditional straight XX/1,000 persons recommendation. This LOS approach attempts to incorporate a more holistic and community-specific evaluation into overall recreational asset and programmatic strategies and development.

Anecdotal Evidence of Facility Need and Opportunity

Interviews were by Paradigm with City of Buffalo Department of Parks and Recreation personnel with respect to the department's assessment of where current pressure points exist in program scheduling and facilities use, and also where it is felt that future pressure will rest and what additional spaces might be necessary to relieve that pressure.

Additionally, Paradigm conducted direct first-person interviews with a representative sampling of current youth and adult program organizers so as to gather their thoughts, concerns, and recommendations regarding current facility availability, constraints holding back the growth of their programs, and ideas for future facility investment and use.

Summary statements based on these interviews are provided as follows:

- City-based non-profit youth programs are currently constrained by a lack of available facilities. Organizations such as the PAL believe that they could provide more opportunity within their core summer sports, if they had greater access to a larger inventory of recreational facilities;

- For-profit adult programs such as M/ilesports and Buffalo Social Club are similarly constrained by a lack of City-based facilities. Their current experience is that potential participant programs migrate to suburban leagues, in some cases, due to a lack of league opportunity at City facilities, and/or because league seasons are shorter in the City due to a lack of facility availability. High growth of coed, kickball, and soccer programs in particular have created opportunity for these adult programs,

but the facility inventory in general in the City is unable to keep pace with that growth;

- Not-for-profit adult leagues such as South Buffalo Softball are similarly constrained by a lack of facilities, and have also been limited by the curtailing of certain opportunities to play which, in the case of South Buffalo Softball, included the elimination of lights at Houghton Park that had historically allowed for softball play past dark and into the middle and late evenings, as well as fall league evening play;

- The local soccer community, in particular, is taking it upon itself to organize and mobilize with respect to advocating investment somewhere in the market in a soccer complex of some size and capacity. The Buffalo Soccer Council currently includes as its members the following organizations: Westside International Soccer Club; FC Buffalo; Soccer Shots; Yemen Soccer; UB Men's Soccer; Buffalo developmental Soccer League; and Blackwatch Premier. Additionally, interviews with other premier programs such as Empire United and New York Premier Soccer indicate a desire on their part to advocate for a centrally-located soccer complex that would allow them to consolidate their outdoor training, outdoor league games, and off-season indoor training for their 200+ and 300+ participants respectively;

- City of Buffalo Division of Parks and Recreation estimates that if the current composition of available facilities in the City remains static, 80% of permitted time at City facilities will be allocated to youth programs within five years, and that that figure will grow to 85% in 10 years. It is estimated that an additional 10+ soccer fields would allow for youth program growth, while at the same time leaving availability for revenue-generating adult programs. Similarly, because many if not most of the City's baseball diamonds are "home" fields for City-based youth baseball programs, young and older adult baseball programs have limited opportunity to schedule time at City facilities. It is estimated that an additional four baseball fields would allow for more adult league play, and would be readily booked in the months of May, June, and July. Lastly, City softball diamonds are largely booked by under-10 baseball programs. The growth of coed, women's, and adult fun league programs has created added

pressure for softball play on the City's softball field inventory. It is estimated by the City that an additional 4-6 softball fields would readily accommodate adult league play and allow for their expansion.

Facility Options and Opportunities – Incremental and Non-COB Recreational Sports Demand

In the course of conducting interviews with City of Buffalo Division of Parks and Recreation youth sports and recreation program representatives, a degree of crossover was identified between programs that typically utilize City recreational assets on a generally seasonal basis (i.e. baseball, softball, soccer, football, other) and other sports-rec programs that operate as aggressive private non-profit or private sports program organizers and operators, with the later in some instances indicating a need for and willingness to pay for "off-season" (i.e September-October through March-April) time at indoor facilities. This indication aligned with largely anecdotal information circulating within the market regarding the need for additional indoor sports facilities that could accommodate off-season clinics, training, leagues, tournaments, and related activities.

The preliminary indication gathered by Paradigm related to this indoor facility option caused a rigorous interview process to be constructed and executed by the project team, so as to add to largely anecdotal information regarding the need within the market, and perhaps within the City of Buffalo specifically, by speaking directly with key program representatives and user groups already established and active within the Western New York market. Ultimately, this effort included a broad interview process that captured information from a targeted variety of entities including but not limited to the following:

- City-based private high schools;
- City-based colleges;
- City-based charter schools;
- Youth sport membership programs (i.e. house/travel soccer, lacrosse);
- Premier youth sports programs (i.e. high-level premier soccer); and
- Adult membership sports programs (adult soccer and lacrosse leagues).

Specific programs and entities interviewed by the Paradigm team within these categories include but are not limited to the following:

- Blackwatch Premier (youth soccer, premier level);
- Buffalo District Soccer League (adult soccer);
- Buffalo Legacy Project;
- Buffalo Soccer Council;
- Buffalo State College;
- Buffalo/Western New York Junior Soccer League;
- Canisius College;
- Canisius High School;
- Daemen College;
- Delaware Soccer Club
- D'Youville College;
- Empire United Soccer (youth premier-level soccer);
- English Pork Pie Company
- Erie Canal Harbor development Corporation
- Erie Community College;
- FC Buffalo (adult soccer);
- Global Premier Soccer (youth premier-level soccer, NYS chapter);
- Health Science Charter School;
- Medaille College;
- Nichols School;
- Tapestry Charter School;
- University at Buffalo track (includes USATF and NYS high school); and
- West Side Soccer (youth soccer).

Informative themes, issues, and recommendations were identified throughout these interviews that in combination provide a consistent advocacy by potential users for a new indoor turf-centric sports-rec facility within the Western New York market. A condensation of these themes, issues, and recommendations is provided as follows:

- Programs that believe the regional youth-adult sports market is underserved by the current inventory of indoor turf facilities generally believe that a City-based indoor facility would have great utility not only for their own program(s), but for other local-regional programs needing indoor training, league, clinic, and tournament play, access, and programs;

- Programs that have extensive experience participating in competitions across the state support the development and operation of an additional indoor facility in WNY, based on their specific knowledge of facility inventories and facility operations not only in other New York State markets such as Rochester and Syracuse, but also in non-NYS markets in Boston, Ohio, Massachusetts, Connecticut, and elsewhere;

- The location of existing indoor turf facilities in WNY (i.e. Epic, Sahlens) tend to provide consistent travel issues related to concerns and challenges that come with winter driving during the November-February period;

- High-volume users of indoor turf time (i.e. premier youth soccer programs primarily) have a difficult time finding enough indoor time for training during the indoor season. Additionally, they find it problematic to consolidate their training schedules at a single facility or at one facility primarily. They would prefer to have “resident” status at a single facility, which would make the administration of their program in particular more efficient and effective;

- A lack of geographically-proximate indoor turf creates logistical issues for City-based college athletics programs looking for indoor training time for their spring sports programs. Programs do use existing indoor turf facilities for this purpose, but bussing student athletes to at-a-distance locations creates not only extra costs, but use-of-time issues that are inconvenient and that can cause scheduling challenges;

- Programs that are looking to grow their membership are restrained because of priority scheduling at existing indoor facilities that preclude them from gaining scheduling advantages over entrenched (i.e. “preferred”) user programs;

- The evident volume of indoor softball training in particular at Sahlen’s indicates a lack of specific indoor softball training facilities in WNY, which provides evidence of a potential for strong second-tier user demand generated by programs other than youth and adult soccer;

- In some instances, programs are relegated to utilizing hard-court indoor surfaces for practices and training, even at Epic Center, when turf field surface access would be preferred. Program representatives are sometimes forced to change and/or otherwise limit their training regimen on hard surfaces, because spaces tend to be smaller than preferred, are boarded on their perimeter, or are in gymnasiums with bleachers and/or concrete walls on the immediate perimeter.

VI. MARKET ANALYSIS

The purpose of the recreational needs assessment market analysis was to identify and evaluate target market, participant, and user segments for potential new facility utilization, and to also assess the relative merits of targeted markets and users within a City of Buffalo planning and development context.

It is relevant at this point in the overall analysis to restate the key question that is driving the recreational needs assessment, as follows:

"Is the demand for a new facility (or facilities) to be located somewhere in the City limits real, is the facility type able to be preliminarily identified as an indoor-outdoor sports complex of some defined size and purpose and if so, can private sector investment and ownership criteria be identified so as to allow for the advocating by the public sector of such a project?"

Potential Target Markets, Participants, and User Segments

Based on both City of Buffalo Department of Parks and Recreation program permitting experience as well as primary interviews conducted with current key City recreational facility user programs, there is clear evidence that overall demand is not being adequately met by the combination of City-owned and other-owned facilities in the City of Buffalo geography. In the case of the City of Buffalo, there are not enough facilities to satisfy the demand of either youth sports programs that play for free, or the adult pay-to-play programs that follow behind City-based youth programs and the Buffalo Public Schools interscholastic sports programs from a permitting priority standpoint.

City-based private facility owners including colleges and private high schools have scheduling priorities that preclude consistent access and utilization by outside user groups and programs. And Buffalo Public Schools, while having in its own inventory of facilities some of the newest and most contemporary fields within the City limits, have administrative processes in place that tend to limit and in some cases discourage pay-to-play programs from seeking access to and permitting for these high-demand facilities.

From the perspective of a private sector facility investment, development, ownership, and management opportunity, any attractive and realistic investment

will need to exhibit revenue-generating capability that will warrant the initial investment. Therefore, indoor and outdoor spaces that can attract pay-to-play programs need to be identified, quantified, and translated into annualized revenue estimates. Such programs have been determined to exist within the current City of Buffalo recreation facilities user base. In some cases, these programs are consistent and active users that would welcome additional access to facilities. In other cases, these programs are limited and inconsistent users of City facilities, not because the demand is not there, but because they are at the end of the City prioritization list and/or because they desire to access facilities that appear to them to be in the shortest supply (i.e. full-sized soccer fields).

For facilities that are accessible, there is evidence that demand will flow in the direction of new outdoor facilities in particular that are introduced to the market, and that pay-to-play programs in particular will permit for time especially if the facility provides a contemporary setting and play experience. An example of this is the new all-weather Pierce Field at Mulroy Park facility in South Buffalo. Additionally, private facilities that actively and aggressively book time, such as Nichols with its outdoor all-weather field surfaces, can generate six-figure annual income from outside rentals without compromising access by its own interscholastic sports programs.

Therefore, a focus on pay-to-play adult programs, as well as on for-profit premier league youth programs, can justify investment in outdoor facilities and spaces that are of a contemporary nature, and which most likely need to have extended-season capability by being of an all-weather surface design.

Additionally, off-season indoor training and league play can justify investment in an indoor facility. While not experienced by the City of Buffalo or City-based private sector facility owners, an indoor turf field facility in particular is routinely discussed by pay-to-play programs as being necessary within the market, and attractive if located within the City of Buffalo. Such an indoor facility would allow pay-to-play programs that are active at City and non-City facilities during the outdoor season to migrate indoors during the off season, and perhaps at the same location at which they concentrate their outdoor season play and training.

Lastly, with respect to an indoor turf field investment opportunity, City-based colleges and high schools in particular indicated an interest in having access to and utilization of a City-based indoor venue for off-season and pre-season training for football, baseball, softball, soccer, lacrosse, and field hockey.

In summary, target programs within the general "pay-to-play" category can be identified as including but not being limited to the following:

- *Existing outdoor adult leagues* (soccer, softball, baseball, kickball, flag football, volleyball, other) looking for contemporary, accessible, and convenient play opportunity;

- *Potential indoor adult leagues* (soccer, kickball, flag football, volleyball, other) looking to expand their participant base into year-round activity;

- *City-based travel, premier and other high-end soccer programs* (for both outdoor and indoor seasons and training), as well as soccer programs not necessarily resident within the City, but with large participant bases that are geographically proximate to the City;

- *Regional softball and baseball programs* conducting off-season training; and

- *City-based college and private high school sports programs* in need of off-season training facilities (for football, baseball, softball, soccer, lacrosse, and field hockey).

Test of Program Demand Against Measurable NYS Market Experience

The stated demand of local and/or City-based recreational, intercollegiate, and other sports programs for indoor facility access can be framed within and tested against the actual experience of other identifiable metropolitan markets in New York State, in order to better ascertain the credibility of indoor facility development as a preferred option within the City of Buffalo. This can be achieved by evaluating economic-demographic characteristics of comparable NYS markets by ranking NYS markets by county size, and by then comparing the inventory of available indoor turf facility assets to the population density of each market. This comparable county markets assessment is provided below in Table Nine.

Table Nine: NYS County Demographics

Market	Tot. Population (2000 actual)	Tot. Population (2013 est.)	# Indoor Field Sports Facilities
Erie	950,265	919,866	3
Monroe	735,343	749,606	5
Onondaga	458,336	468,387	4
Albany	294,565	306,945	3
Oneida	235,469	233,585	2
Broome	200,536	197,534	3
Ontario	-	109,103	0
Tompkins	96,501	103,617	1
Tioga	51,784	50,243	0
Chenango	51,401	49,503	0

Source: U.S. Census 2000 and 2013, New York State West Youth Soccer Association

This table would indicate that Monroe County has the largest number of indoor facilities in the top 10 NYS county markets.

Additionally, the exhibit represents that a wide range of indoor field sports venues per 100,000 of population exists between markets. This range, represented from high density of venues to low density of venues per county, is summary as follows:

Broome	One venue per 66,000
Albany	One venue per 102,315
Tompkins	One venue per 103,000
Onondaga	One venue per 117,000
Oneida	One venue per 117,000
Monroe	One venue per 150,000
Erie	One venue per 306,622

This facility density summary would indicate that, assuming that program and facility demand is equal among county markets, the Erie County market, at three indoor turf field facilities (Epic Center, Sahlen Sports Park, Sportsplex), is relatively underrepresented by indoor field sports facilities when compared to five lesser-sized NYS county markets that have at least one indoor facility. This supports the general premise that is implicit in the information generated through the study's program representative interviews, that there is significant pressure within the market for greater access to indoor "off season" turf time within the market.

Sports Program Market Characteristics that Apply to and Support Indoor Facility Investment and Operation

A set of key quantifiable information captured through secondary research and program representative interviews serve in the aggregate to support the contention of the market that the regional outdoor recreational, intercollegiate and related sports market is of a size and has budget, membership and operational characteristics that align with assumptions that would integrate with business plan development and financial modeling exercises for such a project. Examples of such information can be articulated as follows:

- Existing local indoor turf field facilities can charge between $165-$225 per hour for prime field time, which is a rental fee range that is similar to ranges charged in other NYS markets and by facilities in those markets that follow a private ownership model and which have exhibited operational longevity in their respective markets;

- Similarly outdoor fields in WNY tend to charge in the range of $125 per hour for rental time, which again is commensurate with rental rates charged by going concern facility operations in other markets;

- Larger premier soccer programs in WNY exhibit a range of annual indoor and outdoor field rental costs of $140,000-$180,000 each;

- Larger premier soccer programs in WNY have membership levels of 200-375 annually, with desires to and expectations of enlarging these programs, with field access being a key consideration in their efforts to do so;

- City-based house and premier soccer programs are expanding in order to add play levels to their overall offering, in particular in the areas of girls' travel and girls' premier team play;

- Existing rec sports programs that operate primarily in the summer (May-September) spend low- to mid-five figures in outdoor facility rentals annually, and believe that they could expand their program offering to include indoor sports with the addition within the City of contemporary indoor facility space.

Relative Merits of Target Markets and Users

In the judgment of the study team and within a City of Buffalo planning and economic development context, a privately-developed indoor-outdoor sports complex would appear positioned to contribute in both a broad and specific manner.

In broad terms, the type of sports programs and the profile of program participants envisioned for a proposed indoor-outdoor sports complex speak directly to “quality of life” enhancement for City residents primarily. Such a development project contributes specifically to the marketability of the City of Buffalo as a place to live, work and recreate. A project of this type can also combine with other recent and forthcoming recreation, leisure, and public assembly development projects and business operations – think Larkinville, HarborCenter, inner and outer harbor and similar – in a “whole is greater than the sum of its parts” manner.

In more specific terms, the target users and programs represented by the “pay-to-play” universe represent disposable income, and therefore economic impact. Expansion of existing adult rec sport programs means the likelihood of additional employment and incremental business spending. Incremental business spending generates incremental economic impact through business operations – direct, indirect, induced, and fiscal.

Additionally, a state-of-the-art complex that produces an ongoing stream of user programs and participants in turn will likely produce incremental foot traffic for restaurants, retailers, service stations, and the like. Target audiences and program participants that might otherwise limit their exposure to and time in the City as a result of minimal participation in available City-based recreational programs, or who might not experience the City at all because they or their children currently utilize suburban facilities for league play and/or training, will contribute to an incremental increase in visitations to the City by adults, young adults, and families with children.

On the other side of this point, City of Buffalo residents who currently participate in suburban recreation programs due to a lack of similar program opportunity in the City, will be able to remain in the City to satisfy their recreational needs, and will keep their related social dollar spending in the City as a result.

Lastly, the ultimate design program for an indoor-outdoor sports complex may lend itself to some of the functionality that will allow Visit Buffalo Niagara to increase its business development efforts and sports tourism prospecting success rate, by including outdoor sports field and indoor field house capability that satisfies the facility requirements of local, regional and other bid opportunities in the areas of baseball, softball, soccer, lacrosse, field hockey, rugby (all outdoor), as well as gymnastics, wrestling, indoor track, basketball, cheer, dance, and other (all indoor).

Investment that would allow for sports tourism-related functionality and competitive positioning would depend largely if not solely on the cost-benefit that would be attributable by the owner to the capital investment and operating budget, and specifically the amount of annual projected revenue that would be gained, or lost, by allocating rentable time to potentially low- or non-rent-paying multi-day sports events.

Support for Indoor Turf-Centric Development Opportunity

Based on the key user, overall demand, broad market and competitive facility analyses conducted by the project team in this study, the professional judgment of the project team concludes that an indoor turf-centric development project identifies, above other indoor or outdoor facility types that might be considered, as a high-priority need within the WNY market, and within the City of Buffalo in particular, and importantly as one that should be attractive to private sector developer-owner-operators because of its financial performance viability.

Characteristics of an indicative prototype facility can be identified based on the project analyses conducted in this and previous report sections, can be judged against active comparable market economic, demographic, and existing facility conditions as assessed in the report section that follows, and will be fully articulated as a preliminary layout and construction cost estimation in a later section of this report.

The judgment of the project team specifically indicates the following list of criteria for the prototype facility:

- A City-based location, having relatively high visibility for vehicular traffic, in-place infrastructure, easy ingress and egress for passenger vehicles;

- In an optimal situation, room within the geographic footprint for potential facility expandability in later phases, with any expansion to be based on demonstrated key program need and growth;

- Construction using metal clad ("Butler building") materials and technology, to maintain a conservative overall construction budget;

- A single-field indoor design as a first phase construction, with a dimension large enough to both support true 11v11 U18 and adult soccer play, and to also be sectionable with curtaining so as to divide into three smaller side-by-side fields;

- A cluster of four outdoor playing surfaces, two all-weather surface and two natural grass surface, to accommodate late-season and early season demand in particular as indicated by local soccer, lacrosse, rugby, and other field sport teams, leagues, and programs, and to create in combination with the indoor facility a true indoor-outdoor complex that supports year-round play and activities;

- A primary programmatic focus on satisfying local/regional team, league, program, and school needs so as to maximize both seasonal utilization and revenue-generating opportunities for the ownership group, with a limited focus on special events other than those that can be conceived of and managed by the facility itself; and

- A private not-for-profit legal/business structure that is capable of maximizing revenue generation while at the same time taking advantage of income and tax-saving opportunities that are available to registered non-profits.

VII. COMPARABLES IDENTIFICATION AND ANALYSIS

ANALYSIS OF EXISTING SPORTS-REC FACILITY INDUSTRY CONDITIONS

An analysis of existing industry conditions on behalf of the proposed indoor turf center project focused on supply-related characteristics of the local-regional facility and events market, as well as on identification of regional and other comparable facility development projects and operations that a new City of Buffalo-based strategic planning, design, and management-operations planning could both learn from and model itself after.

DESIGN AND OPERATIONAL TREND SUMMARY

As is the case with indoor skating venues, contemporary indoor turf field facility design and construction has accelerated within the last decade based primarily on the increasing level of youth soccer participation in the U.S.

Particularly in seasonal regions of the country like the northeastern U.S., soccer programs benefit from the year-round activity that indoor facilities allow, as do other outdoor sports with lesser participation such as lacrosse and field hockey. As a result, facility design programs and specifications have adjusted in order to provide a more satisfactory indoor playing experience for participants, as well as for a more comfortable experience for attending non-participants. In certain cases, some of these improvements have now become the new technical standard and are expected by individual users and programs to be included in a facility's design or renovation process.

These improvements and considerations should be acknowledged and top-of-mind for a proposed City of Buffalo project as it contemplates an indoor turf field investment as a potential component of a potential regional multi-activity sports complex development project.

A summary of contemporary indoor turf field facility design trends is provided in the following key areas:

- Multi-field configuration
- Retail component integration
- Energy efficiency
- Enhancement of user spaces
- Community component inclusion
- Enhancement of exterior and interior treatments
- Enhancement of seating capacity and type of seating
- Allowance for year-round utilization
- Cost per square foot (SF) range
- Break-even opportunity

- **Multi-Field Configuration:**

  Sizing of new facilities is typically carried out in order to accommodate the current and projected programming needs of existing local-regional user groups and anchor tenants. A consideration in many cases is the inclusion of at least two playing surfaces in a development project. This can be justified, beyond projected tenant utilization, as a means for better accommodating special events (such as field sports leagues, tournaments and clinics) that require access to more than one playing surface. Additionally, assuming that there is alignment with market demand, multiple fields are often a requirement to generate sufficient revenue to assure successful long-term financial performance.

  Lastly, some projects adopt either a “wait and see” strategy that allows for building expansion and the increasing in size of an initial single-field configuration, and/or the adding of a second or third field at a later date should user demand warrant;

- **Retail Component Integration:**

  Typical concessions food is generally offered, as well as vending machine fare. Pro shops that sell athletic gear specific to the facility’s targeted sports are often found, but they typically occupy a modest amount of space and often are combined with the food sales operation so as to minimize staffing for each. Interviews with NYS-based owner-operators has indicated that food service and retail operations are often provided as a courtesy to users, not with an intention of generating incremental revenues;

- **Energy Efficiency:**

  Unlike indoor skating venues, indoor field sports facilities have relatively limited utility (electric, gas, water) requirements, due to the need to only warm and cool the air of a typical indoor environment during a typical 6-month operating calendar. This can make the indoor field sports facility, as opposed to an ice rink complex, a more attractive type of facility and operation from a purely operational (i.e. expense line item for utilities) standpoint;

- **Enhancement of User Spaces:**

  Maximizing field use is key to enhancing revenue performance in any new indoor facility. That said, support spaces for field sport activities are typically less in demand than they are in indoor skating venues. Locker rooms are helpful but not always necessary, as field sports participants can arrive in their athletic gear. The same applies to referees. Therefore, it is possible to concentrate space allocation on the playing surface specifically, as opposed to on support spaces. The exception is for storage space, which is always in some degree of demand;

- **Enhancement of Interior and Exterior Treatments:**

  Typically, facilities are of a "Butler building" design so as to minimize the cost per square foot of construction. However, for facilities that are intended to be "signature" structures for a municipality or on a college campus, enhanced exteriors and interiors might be a necessary construction investment, so that the look and feel of the facility satisfactorily integrates into the overall design and development strategy of its surroundings;

- **Enhancement of Seating Capacity and Type of Seating:**

  Organized soccer play does not typically attract the same size crowds as does indoor ice hockey or figure skating. However, in order to accommodate anticipated special events, new facilities having multiple fields can consider having a designated "feature" field that provides a larger volume of seating (sometimes 1,000+ seats) than the typical facility.

  Seating capacity must be provided so as to accommodate the greatest volume of anticipated attendees at any regular user group event, and consideration is often given to providing seating in excess of that amount, in order to accommodate on a situational basis special events as well as future anchor tenant programs. In many cases, use by a local college soccer and/or

lacrosse program, or anticipation of serious regional or national tournament play, can be the justification for extra seating;

- **Allowance for Year-Round Utilization:**

  Older indoor field sports facilities typically were not designed to be utilized during the traditional outdoor playing season (May-September). That is, they often did not have HVAC systems installed initially that were capable of cooling the facility for summer use.

  Today, almost all new turf field facilities are designed to be used on a year-round basis, even if off-season utilization is relatively minimal. This requires investment in and installation of HVAC equipment, the running of which increases energy use and expenses during warm weather months. However, field sports typically migrate outdoors during the May-September period, and limited revenue opportunity typically exists for field sports facilities during the late spring-summer and early fall months.

- **Cost Per Square Foot (SF) Range:**

  In today's indoor turf field facility development environment, the construction cost per SF that is associated with contemporary design and utilization has a price point range that is fairly narrow, but which is at the same time more costly than that which was experienced by earlier generations of turf field facilities.

  Typical metal facilities are in the $75-$125 per SF range for construction only. Facilities on the low end of this range have found ways to economize on materials purchase (by receiving discards and donated materials) and on construction labor (by using volunteer labor). The specific economic benefits created by donated materials and labor are best generated by an ownership group operating under non-profit status (typically 501 I(3)), which allows for tax benefits for donations of materials and time. More expensive facilities tend to include enhanced food service and retail components, as well as higher price points on interior and exterior materials and finishes;

- **Break-Even Opportunity:**

  The volume of annual rented field time and hourly rental rates are the most significant variables impacting an indoor field sport facility's ability to generate operating revenues.

In many cases, particularly in smaller and/or isolated markets with low or moderate prime time rental rates, primary user groups (youth soccer, youth lacrosse and field hockey) with small memberships and low public use volumes (i.e. open play), achieving financial break-even on operations can be problematic, and covering typical debt service for a traditional construction loan is often unrealistic. In these instances, public or private operating subsidies are necessary.

Conclusion

In summary, older generations of indoor field sports facility complexes were designed to simply accommodate the most basic recreational and competitive play needs of their primary sports participant audience. User comfort, customer service, marketability, and any needs of non-participating fans, parents, and friends were of little or no consideration in early facility design and operation.

Today, contemporary design at minimum considers the needs of both facility users and the spectating public, as well as the opportunity to enhance the marketability and revenue-generating ability of the facility, and also to accommodate non-field sports, multi-purpose use and year-round utilization.

Contemporary design considerations and options are typically focused on the generation of revenue above and beyond field rentals, the more comfortable and expeditious accommodation of user groups, support personnel, and event attendees, the enhancement and streamlining of facility operations and functionality, and the minimization of common and major operational expenses. However, such designs and accommodations come at a cost of construction that is greater than that which was found in earlier generations of buildings.

Additionally, the seasonal aspect of indoor field sports operations, when combined with unique market characteristics that can impact revenue generation (size of target market, price points on field rentals, incidence and size of traditional field sports user groups), can make the achieving of financial breakeven a goal that not every indoor facility in every U.S. market can attain.

DEVELOPMENT TREND SUMMARY

Earlier generations of indoor field sports facilities were developed in a typically straightforward manner. In many cases during the 1980's and 1990's, indoor field sports were played on a temporary basis on top of temporarily covered municipal ice sheets, or on hardwood gym floors in school and church gymnasiums.

In some instances, municipalities financed, developed, operated, and then subsidized the operation of (primarily) single-field indoor enclosed facilities, with a target user market being the local and regional tax-paying public. Private schools, colleges, and universities also built new indoor facilities in order to accommodate their intercollegiate programs primarily and on-campus user groups secondarily.

Since the early 1980's, and primarily based on the interest in soccer generated by U.S.-based Summer Olympics competition, World Cup Soccer play, and the achievements of the U.S. women's national soccer team, U.S. youth and adult soccer participation growth has stimulated the development of a new generation of indoor field sports venues in the U.S., particularly to accommodate off-season indoor play. In many cases, traditional municipal financing, development, and operating mechanisms are no longer applicable based on a facility owner's need to cost-justify its initial capital, and potentially its ongoing operational, investment.

As a result, a number of non-traditional conditions and characteristics are regularly found attached to current-generation indoor field sport facility development, renovation, and expansion projects. A summary is provided in this section of these conditions and characteristics in the following areas:

- Multi-purpose utilization strategy
- Public/private partnerships
- Generation of ancillary economic development as a key strategic goal
- Generation of commercial foot traffic as a key strategic goal
- Non-traditional ownership, management, and utilization
- User-promoted development

- **Multi-Purpose Utilization Strategy:**

  Traditional indoor field sport facilities were typically designed and operated for single-purpose utilization only.

In today's user climate, research can indicate that a facility investment can better or best serve its targeted service area by being multi-purpose in its intent, design, and operation. Additionally, multi-purpose capability can oftentimes provide the year-round revenue generating capability that a facility needs in order to sustain itself financially.

Multi-purpose utilization of an indoor field sport facility can include the hosting of ticketed events during the indoor season (by covering the turf playing surface) or during the off season, as well as scheduling of a variety of "dry" events such as craft fairs, CPA exams, and consumer shows;

- **Public/Private Partnerships:**

  Traditional facilities were typically financed and developed by either a municipality or by an educational institution.

  In today's indoor field sports facility industry development and operating environment, most facilities are found to be owned and operated privately. This runs contrary to the typical ownership/operating scenario found with indoor skating venues, and speaks to the more attractive investment opportunity that indoor field sports venues generally represent when compared to ice rink operations;

- **Generation of Ancillary Economic Development as Key Strategic Goal:**

  Traditional indoor field sport facilities had a simple mission: to provide a recreational opportunity to the local/regional recreational sports public.

  While an indoor field sport's facility's strategic purpose can be multi-dimensional, the concentration of privately-owned indoor field sports facilities causes ancillary economic development to typically be a low priority. Private owner-operators generally are focused on generating revenues for their facilities primarily if not solely, and any ancillary economic development or benefit that results is typically unplanned and unexpected;

- **Generation of Commercial Foot Traffic as a Key Strategic Goal:**

  Once again, the concentration of field house operations with private operators makes location of facilities in high or potentially high foot traffic areas a low priority. While retail operations within facilities do need a steady flow of retail consumers, those can typically be generated by the facility's user base for whom the food-beverage and other retail are typically tailored;

- **Non-Traditional Ownership, Management, and Utilization:**

  In today's market, facilities tend to have ownership, management, and utilization characteristics that have not been found at traditional municipal indoor field sports venues. With respect to new or recently-built indoor field sports facilities, USA Soccer-connected ownership groups, and even not-for-profit foundations are now in the business of financing, developing, and operating indoor field sports operations.

  Private management companies, theoretically providing to facilities operational expertise and access to unique industry resources, are being contracted with on a limited basis to oversee facility operations on behalf of both private and public owners. And non-field sports uses are frequently becoming a greater percentage of the facility's annual event schedule;

- **User-Promoted Facility Development:**

  Demand for primetime indoor field use in the U.S. by both youth soccer and, to a lesser extent, youth lacrosse and field hockey associations, has grown dramatically since the late 1980s. As a result, these primary user groups primarily have been strong advocates for the renovation, replacement, and addition of new indoor field sports facilities, particularly at the private ownership and operation level. In some cases, regional youth-adult soccer organizations themselves have become developers and owner-operators, especially with outdoor soccer field complexes, which often serve as a prelude to indoor field sports facility development and operations.

Conclusion

As is the case with indoor skating facilities, the projected financial performance of new indoor field sports facilities is now a key consideration for most development projects of this type. Market evidence indicates that the private development-ownership-management model is most prevalent with new indoor field sports complexes, and the imperative is therefore on optimizing financial performance for the private owner-operator. The exception in indoor field sports facility development is now the traditional municipally-financed, owned, and operated facility.

ANALYSIS OF COMPARABLE AND REGIONAL COMPETITIVE FACILITY OPERATIONS

COMPARABLE INDOOR FIELD SPORTS FACILITIES/MARKETS ANALYSIS

Beyond the broad U.S. indoor field sports facilities market, it is important for the purpose of this City of Buffalo analysis to examine subsets of the facilities universe that can serve as strategic and operational reference points for a potential Buffalo-based indoor turf field sports facility operation.

In order to accomplish this, an evaluation was made by the Paradigm project team of indoor field sports facilities in major NYS markets, as well as in NYS markets deemed to be most comparable in size to that of Erie County, with particular interest in facilities designed to accommodate either, and perhaps a combination of, youth sports programs, interscholastic, and intercollegiate field sports programming.

Key U.S. Census Bureau Data

As a state with one of the country's most active youth soccer program volumes, New York State serves as an appropriate geographic territory to identify applicable markets against which the Erie County market can be measured.

Using actual 2000-2013 U.S. Census data and estimates, all major metropolitan statistical areas (MSAs) in NYS were evaluated according to total population in order to determine correlations between existing NYS market characteristics, and incidence of indoor sports field facilities and operations in those markets.

These markets were then cross-referenced against indoor field sports venue databases, to show the number of indoor field sports facilities *that actively book indoor sports-rec programs* per major NYS MSA. Table Ten provides a comparative summary of this data.

Table Ten: Comparable Markets Analysis – New York State

Market (MSA)	Tot. Population (2000 actual)	Tot. Population (2013 est.)	# Indoor Field Sports Facilities
Buffalo-Niagara – WNY	1,170,111	1,134,115	3
Rochester	1,098,201	1,083,278	5
Albany-Schenectady-Troy	875,583	877,905	3
Syracuse	650,154	662,578	4
Utica-Rome	299,896	297,766	2
Binghamton	252,320	247,777	3
Jamestown	139,750	133,080	0
Glens Falls	124,345	128,774	1
Elmira	91,070	88,506	0

Source: U.S. Census 2000 and 2013, NYS West Youth Soccer Association

- While the NYSWYSA database may not include all available indoor field sport facilities in every market, it does provide a reliable standardized measure for comparing one market against another. As would be expected, and with some exceptions, larger metropolitan areas in New York State exhibit substantially larger inventories of indoor venues than do smaller markets.

OLDER, RECENTLY OPENED, AND PENDING NYS FACILITIES

A second context that was assessed was the more specific classification of inventory of old, new or recently opened, and pending indoor field sports facilities in New York State.

By identifying and understanding the strategic reasoning behind these development projects, it was expected that broad industry and market trends could be identified that would have relevance to the strategic decision-making that would need to be applied against facility development considerations for a new indoor facility in the City of Buffalo.

Using a variety of industry and professional contact resources, an inventory of long-standing and recently built facilities, as well as pending or under construction facilities, have been identified in New York State by the market study.

This inventory is represented in Table Eleven.

Table Eleven: NYS Indoor Field Sport Facilities Inventory

Facility	Location	Legal Entity Type	# Indoor Fields	Year Opened/ Added	Comments
OLDER FACILITIES					
Akron Sports Park	Akron	Private	3	Unknown	Might have been closed – phone and e-mail disconnected
Rochester Sports Garden	Rochester	Private	3	Unknown	Appears to be low-cost complex and provider.
Sportsplex Indoor Soccer Center	Tonawanda	Private	2	1982	Very old building, former indoor tennis center, limited flexibility.
Syracuse Indoor Soccer Center	Syracuse	Private	2	1984	Debt paid off, owner beginning to reinvest in facility.
NEWER FACILITIES					
All Star Sports Arena	Rochester	Private	2	2006	Converted in 2006.
Brighton Sports Zone	Rochester	Private	2+	2006	Converted in 2006.
CNY Family Sports Centre	Baldwinsville	Private	2	Unknown	Rumored by other facilities in market to be for sale.
Cortland	Cortland	Private Non-Profit	2	2004	$1 million in foundation support for construction.
Epic Center Indoor Soccer	Lancaster	Private	2	1998	Very aggressive operation, multi-sport programming.
Sahlen's Sports Park	Elma	Private	2	1997	Significant corporate/family financial support.
SportsCenter 481	Syracuse	Private	2	Unknown	Fairly traditional operation.
The Field	Ithaca	Private Non-Profit	2	2001	Fields added on to existing indoor skating rink operation
Total Sports Experience	Rochester	Private	3	DNK	Multi-function sports and non-sports capability.
Turin Sports Dome	Fairport	Private	1	DNK	Converted tennis center.
Ultimate Goal	Syracuse	Private	2	DNK	Company's Watertown location closed down 2-3 years ago.
Sports Dome	Endicott	Private	3	2006	Large inflatable dome.
PENDING FACILITIES					
Canandaigua	Canandaigua	Private Non-Profit	TBD	TBD	1-2 field facility planned, in discussion since early '00s.
Greater Binghamton	Conklin	Private Non-Profit	3	2005	Phase Two to include double-sheet ice skating component.

Source: Paradigm Economics interviews and database

- Only two of the state's *existing* facilities, The Community Center (The Rink/The Field) in Ithaca, and the Cortland facility, operate as a private non-profit (501 I(3) entity;

- The two *proposed* new NYS facilities are proposing to construct and operate as private non-profit entities;

- Four facilities are considered to be "older", and 12 facilities are considered "newer" and are estimated to have come on line since 1996, with five and perhaps six either having been built or converted since 2001.

A summary of significant characteristics of the facilities highlighted above is as follows:

Reality of Economic Breakeven Potential

- Because these facilities are all operating as either private for-profit or private non-profit entities, they have a financial imperative to at least break even on operations and repayment of debt service. There is no public subsidy or underwriting available to these facilities if they suffer a financial shortfall (unlike the operation of most ice rink operations);

- The potential ramifications of private ownership and operation can be felt by user groups. As employees and utilities are the number one and two annual expense line items, these two areas tend to be cut back if a facility experiences difficulty in generating targeted revenues. As a result, customer service and user comfort tends to decrease if and when this occurs. The current Vestal facility in particular seems to have these characteristics, and some facilities in the Syracuse area are rumored to have lean and inexperienced staffs and what seems to be lower indoor temperatures (as a result of lowered utility utilization) as well;

- Elimination or minimization of debt service, when possible, can relieve financial pressure from facilities. The Ithaca facility in particular exemplifies how creative construction and development strategies can lower building debt service – discarded light fixtures from Home Depot were utilized to light the indoor skating facility, conveyor belt remnants were used to piece together floor surface covers at the rink, and donated materials were utilized to build bleacher seating using 100% volunteer labor.

Reality of Multi-Purpose Utilization

- Even when planned for in advance, true multi-purpose utilization of an indoor field sports facility is difficult to attain due to the lack of attractiveness of indoor facilities during the spring-summer-fall months for either sports or non-sports programming;

- In actuality, indoor facilities tend to fall back on multi-purpose utilization as a means for making up for an inability to schedule rental times during the off-season at a volume great enough to meet operating projections. Under this scenario, facilities are often forced to retrofit themselves and reorient their operations and marketing staffs in a multi-purpose manner that was originally unintended and unprepared for during the facility's planning, grand opening, and stabilization phases.

Benefits of Multi-Function Program of Requirements

- Municipal facilities in particular are tending to bundle a variety of use opportunities into their facility planning and design, in order to extend the overall economic impact that is generated by the initial facility project. However, this tendency is not typically evidenced in private facility development projects, as private sector developer/owner/operator groups tend to have limited resources to invest, a small margin for financial error, and therefore a specific focus on the intended indoor sports facility and its specific operation only;

New Facilities Have Active and Stable Programs as Anchor Tenants

- Most facilities from the above list were committed to and developed knowing that they had existing youth soccer, youth lacrosse, and in some cases high school and college sports programs that would be either league participants or contract users upon opening. This provided these facilities with guaranteed annual rental revenues from the outset;

Nature of Legal Entity and Accounting Practices Can Make Assessment of Profit-Loss Difficult

- In some cases, facility operating detail for for-profit operations can be either unavailable, and/or perhaps difficult to decipher. On the other hand, non-profit entity statements are by law readily accessible, but allow for accounting practices that can make true determination of operational characteristics difficult as well;

Conclusion

Recent indoor field sports facility development in New York State has occurred in and around major markets (Buffalo, Rochester, Syracuse) as well as in some smaller markets (Ithaca). In all but two cases, new facilities were built by private for-profit developers/operators. Based on assessment of available operating information from some of these facilities, it is evident that achieving economic break-even as a for-profit entity requires that per session team fees for leagues be in the range of $550-$650 (kickball) and $785-$825 and up to $1,200 per team for soccer and lacrosse, with per hour field rental rates of $100 or $175 to $225 per hour being the norm throughout the state.

Additionally, indoor field sports facilities are in reality not actually readily adaptable for multi-purpose utilization. However, some new development projects are expecting to have success in bring complementary recreational functions (fitness centers, public spaces, meeting areas) together under one roof.

ANALYSIS OF MONROE COUNTY COMPETITIVE FACILITY OPERATIONS

Within New York State, Monroe County provides the example of the greatest density of indoor turf facilities per 100,000 of population in markets having more than one indoor facility. Paradigm conducted a comprehensive analysis of indoor turf, indoor multi-sport, and indoor track facilities within the Monroe County geography, so as to understand the most aggressive New York State competitive context within which any new City of Buffalo-based indoor-outdoor turf field facility would compete for targeted users, programs, and revenues.

Paradigm conducted a broad facilities identification exercise that captured both indoor and outdoor facilities and locations identified as being in both the City of Rochester and Monroe County market proper, and attempted to identify key design, layout, management, ownership, marketing, pricing, and user group characteristics of each business operation.

For comparative purposes, indoor turf facility summary descriptions have been in Monroe County have been captured in summary form in Table Twelve so that key facility characteristics by category can be assessed against each other.

Table Twelve: Regional Indoor Specialty Use and Multi-Sport/Turf Field Facility Inventory

Facility	Ownership	Sports Supported	Building Specs	Programming	Marketing	Other	Users
All Star Sports Arena **557 East Ridge Road** **Rochester**	Lonestar Recreation (private)	Travel Soccer, lacrosse, baseball, football, kickball	40x80 yd boardless field; 40x60 yd boardless field; 30,000 total SF	Multi-sports afterschool programs; lessons; youth and adult leagues; private rentals	"tournaments, camps, preseason practices, special events, corporate outings, birthday parties"	Has main lobby area, game area, snack bar; Was converted from a boarded field/rink in 2006; Empire Sports Solutions does naming/sponsorship sales;	Empire United Soccer; Pittsford Mustangs Soccer Club; Fairport Soccer Club; Victor Farmington United Soccer; Chili Soccer Association; Penfield Rangers; Penfield Strikers; Rush-Henrietta Soccer; Honeoye Falls Blaze Soccer Club
Brighton Sports Zone **3195 Brighton Henrietta Road** **Rochester**	Lonestar Recreation (private)	Travel soccer, lacrosse, baseball, football, kickball	40x100 yd boardless 40x100 yd boardless 20x30 yd walled	Boys and girls leagues ages 11-16, and scholastic; $100 cost for 2-hr birthday party for 10	"Rochester's premier indoor sports facility"	Converted from a skate park to a turf field facility in 2006	
Rochester Sports Garden **1460 E. Henrietta Rd.** **Rochester**	Private	Indoor soccer, "soccer tots", basketball, batting cages, table tennis	75x175 ft boardless 75x125 ft boardless 3 basketball courts 2 batting cages Fields are field turf; Have electronic scoreboards;	Batting clinics, adult basketball leagues, soccer leagues and tournaments, rentals, men's annual holiday tournament	"Rochester's premier indoor sports facility"	$25/hr rate for basketball court; $45/hr rate for 2 batting cages (youth league rate); Hours = 7 days per week, M-F 12n-midnight, open 10a weekends; Installing new turf July 2011; Have relationship with	

						West Ham United Int'l Academy, and Super 9 Soccer	
Total Sport Experience	Private	Soccer, lacrosse, basketball, baseball, softball, indoor football	50x80 yd boardless 28x62 yd boarded 25x25 yd warmup 40x65 ft basketball All Astroplay turf	Leagues, camps, clinics, academies, tournaments	"Total Sports Experience is the ultimate sports center!"	$225/hr. full boarded field, $145/hr half field; $125/hr boarded field $60/hr training area $40/hr basketball court	
Turin Sports Dome **260 Hogan Road** **Fairport**	Lonestar Recreation (private)	Travel soccer, lacrosse, baseball, football	40x80 yd boardless Field is Supergrass Outdoor facilities include 2 pools, tennis courts, 40x80 yd field, snack bar, game room, basketball court, locker rooms, pro shop	Kickball leagues (@ $700/team) – 8-wk session, runs Nov.-April		"Adult beverages allowed" at kickball leagues	

Source: Paradigm Economics database and site visits

Table Twelve indicates that within the regional Rochester/Monroe County market, there exist five active indoor rec sports facilities having all-weather turf surfaces either exclusively or in combination with other hard surface areas. These facilities are all privately owned and operated. Three of the facilities – All Star Sports Arena, Brighton Sports Dome, and Turin Sports Dome – are owned by a single owner/operator, Lonestar Recreation. As privately owned and operated facilities, the sole purpose for their existence is to generate revenue. Therefore, their legal structures, business models, and marketing, booking, and scheduling priorities are assumed to focus on this revenue-first operating objective.

The dimensions of the indoor turf surfaces represented by these five facilities are significant to the City of Buffalo facility analysis. These facilities' largest surfaces are of the following dimensions: 100x40 yards, 80x50 yards; and 80x40 yards. These fields can accommodate play up to U12 youth soccer specifications (100-105 yard length min/max, 40-55 yard width min/max), and almost accommodate U13 play (100-110 yard length min/max, 50-60 yard width min/max). Adult play requirements specify 110-120 yard length min/max, and 65-80 yard width min/max.

These five facilities typically include some combination of ancillary and support spaces that includes locker rooms, game rooms, concessions areas, lounge areas, and retail components.

In some cases, it is estimated that the hours of weekly operation for these business operations – that is, how many hours of rental time are available to outside programs and individual users - can reach 90+.

In addition to the five identified indoor turf surface facilities, the regional market has a baseball-specific privately owned indoor operation (Valle Sports Indoor Baseball) and one privately owned volleyball-specific indoor facility (Hotshots Volleyball).

VIII. LOCATION ANALYSIS

Based on the determination of a potential new facility type that was identified in this study's market supply and demand analysis, a preliminary location analysis was conducted that considered potential geographic footprints within the City of Buffalo that might serve as host sites for the indoor-outdoor turf field facility. This location analysis included three main components as follows:

- Development of criteria for optimal project location;
- Creation of a comparative analysis of primary and secondary locations based on evaluation criteria; and
- Evaluation of sites within the South Buffalo BOA against the location criteria.

Development of Criteria for Optimal Project Location

The first consideration for determining the criteria for optimal facility project location is the size of the geographic footprint that needs to be available in order to site indoor and outdoor facilities, parking, and adequate outdoor circulation areas. In this effort, square footage calculations were conducted by the Paradigm project team so as to determine the geographic footprint size that would accommodate the indoor/outdoor sports complex development project that is being preliminarily considered.

The geographic footprint range that was identified (in round figures) is a minimum of 13 acres for a "base" project (indoor turf facility, outdoor soccer fields, parking), and up to a maximum of 37 acres for a phased project that considers additional revenue-generating spaces based on exhibited demand and cost-benefit that could ultimately include a second indoor turf field facility (with additional parking), an indoor baseball/softball training center (with additional parking), and an indoor field house/events center with seating capacity of 5,000+, a rubberized hard floor surface for indoor track and other sports, with additional parking for 1,818 based on a standard 2.75 live event patrons-per-vehicle calculation. Obviously, the need for substantial parking for a potential indoor field house component adds significantly to the maximum footprint scenario (approximately 13.5 acres, or over 33% of the total).

Additionally, using observational information gathered from similar facility types in Western New York and Central New York primarily, a location characteristics wish list was identified that included both primary and secondary criteria as follows:

- Primary criteria:

  - Ability to mass acreage that has been determined to be necessary for both initial development and potential expansion;
  - Immediate access to primary vehicular thoroughfares (i.e. ready access from all directions, and major thoroughfares);
  - Effective traffic controls re vehicular ingress/egress;
  - High visibility by vehicular traffic (neighborhood, local, elevated, other);
  - Geographic proximity to existing/planned complementary business operations (i.e. especially retail, entertainment, gas and food service, recreational, other hospitality);
  - Ability to accommodate high and/or surging vehicle counts without negative impacts on neighborhood;
  - Ability to accommodate relatively high noise (and perhaps field lighting after sundown) levels without negative impacts on neighborhood;
  - Ability to secure perimeter of property;

- Secondary criteria:
  - Proximity to shareable public parking;
  - Ability to install outdoor field lights without negative neighborhood impacts;
  - Proximity to additional, safe walkable street and/or other public parking.

Using these primary and secondary criteria as a guideline, an exercise need to be conducted that provided a determination as to how and where this scenario fit within the South Buffalo BOA, and whether there were one or more location alternatives within the BOA that could be considered for development. Additionally, alternatives outside of the BOA were determined to be of interest as well, so that location characteristics for an array of potential location options within and without the BOA could be compared, as information on and comparison of a menu of preliminarily-identified locations would be of primary interest to potential private sector developer candidates.

Comparative Analysis of Locations

With assistance from the BUDC and the City of Buffalo, an inventory of potential host locations for the new facility project was identified that included both South Buffalo BOA and other City of Buffalo locations. This set of potential sites was selected based solely on a combination of size and availability (i.e. vacant land). Owners of these locations were not contacted and have not indicated that these sites would be available for this type of development and use. The intent of determining this initial set of locations is to indicate that there are potential sites within the City limits that meet the preliminary study criteria.

A total of 11 locations were identified for evaluation by the Paradigm team. This set of location options happened to include seven (7) geographic footprints that were located in one of the four current Brownfield Opportunity Areas within the City of Buffalo. This location set and the BOA within which each location resides is provided as follows:

12. 90 Hopkins Street – South Buffalo BOA;
13. Outer Harbor – Buffalo Harbor BOA;
14. Elk Street – Buffalo River BOA;
15. Emerson Young Park – Buffalo Harbor BOA;
16. Tee-to-Green property – Tonawanda Corridor BOA;
17. Black Rock Yard – Tonawanda Corridor BOA;
18. 1070 Seneca Street;
19. Kensington Heights;
20. Buffalo Forge;
21. Village Farms/Hydroponics/English Pork Pie Company; and
22. American Axle

A more explicit description of basic location characteristics is provided in Table Thirteen below.

Table Thirteen: Target Location Descriptions

	Street Address	Ownership	Size
1. 90 Hopkins Street	90 Hopkins and 40 Hopkins	City, LKQ	17 acres
2. Outer Harbor	Buffalo Outer Harbor	Empire State Development	120 acres
3. Elk Street	85 Lee Street, 98 Maurice, 42 Elk (Buffalo Color), and 503 Elk Street (ExxonMobil)	Buffalo Color, ExxonMobil	15-49 acres
4. Emerson Young Park	Including 43 Carolina	City	15+acres
5. Tee-to-Green	189/191/205 Tonawanda Street, and 69 Dearborn	Golf & Recreational/Ambassador Bridge	32+ acres
6. Black Rock Yard	300 Hertel	CSX	28+ acres
7. 1070 Seneca Street	Same	Private	21.5 acres (potential for add'l 6)
8. Kensington Heights	1827 Fillmore	BMHA	71 acres
9. Buffalo Forge	490 Broadway	Buffalo Forge/Howden Fan	8 acres, plus 4 add'l
10. Village Farms/EPPC	1176/1216 South Park Ave.	EPPC, city-sponsored econ dev	33 total acres

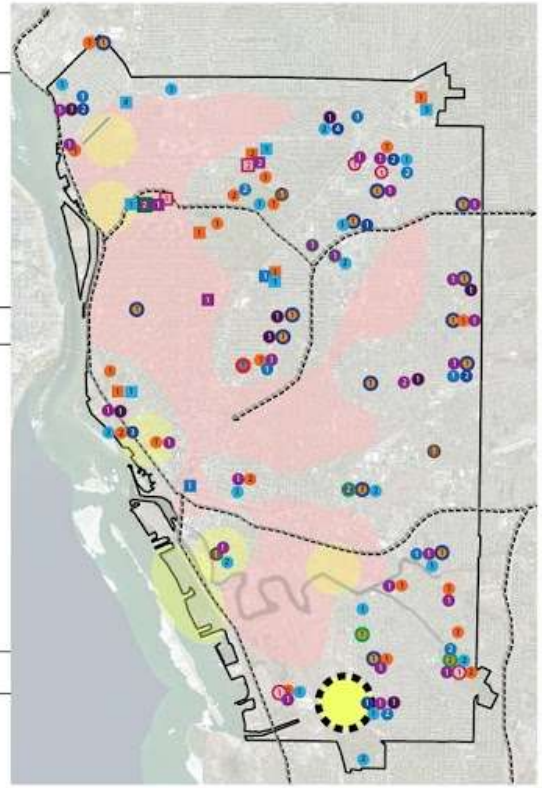
11 American Axle	1001 East Delevan Avenue		5-8 acres total

Source: BUDC

In order to best evaluate the 11 identified City of Buffalo location options, the Paradigm team conducted first-person site evaluations of all the target locations, and supplemented those evaluations with aerial scans using Google Earth. Particular attention was paid to assessing the locations against the primary and secondary criteria that were identified as being elemental to optimal facility location and operation. The following maps and narrative summaries provide a more detailed analysis for each location that allow for a preliminary comparative analysis and prioritization of these sites.

Hopkins

90 Hopkins St. (COB owned) (9 acres)
40 Hopkins St. (LRQ) (8 acres)
South Buffalo BOA



Access

Skyway
Hopkins St.
S. Park Ave.
Ridge Rd.
Tift St.

Context

Schools:

South Buffalo Charter School

Retail & Entertainment:

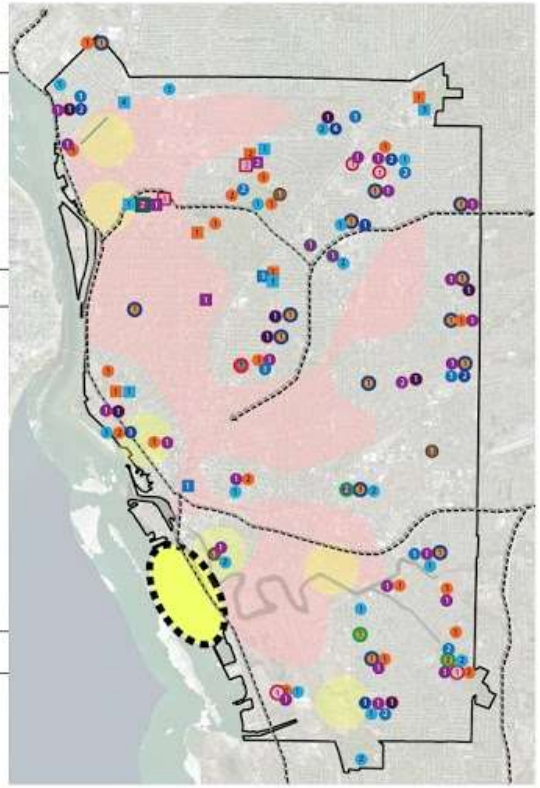
Outer Harbor

Parks & Recreation:

Durant park (1 Prac. Soccer, 1 BBall)
Okell park (1 Football, 2 Hardball, 1 Softball, 1 L.L., 1 Tball, 1BBall)
Tift / Hartmann Field (1 Football, 1 Soccer, 1 L.L.)
South park (2 Softball)
Botanical Gardens

Outer Harbor

ESD property
Buffalo Harbor BOA
120 acres



Access

Skyway
190
Furhmann Blvd.
Ohio St.
Michigan
S. Park Ave.
Boat harbor

Bus route: 74
Outer Harbor/ Tift Bike Trail

Context

Schools:

Southside Elementary School

Retail & Entertainment:

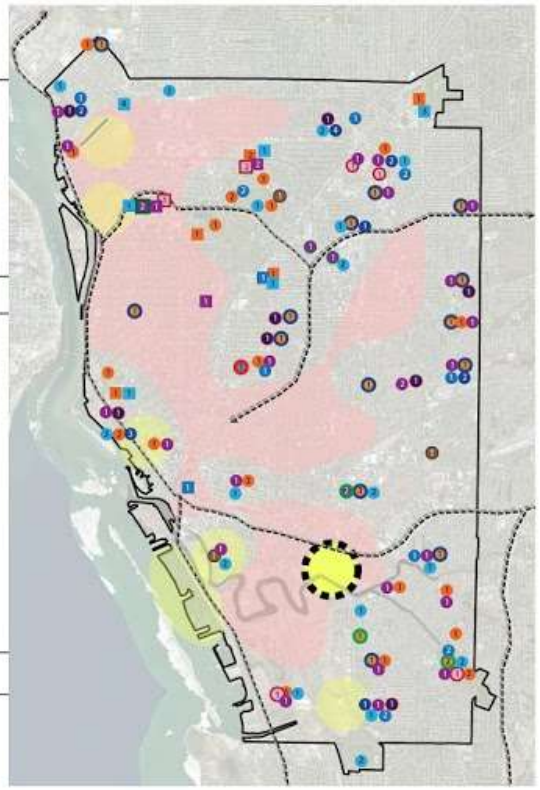
Silo City
Downtown
Casino

Parks & Recreation:

First Niagara Center
Coca Cola Field
Tift / Hartmann (1 Football, 1 Soccer, 1 L.L.)
Conway park (1 Football, 2 Softball)
Times Beach & Wilkenson Point

Elk St.

Buffalo Color (South Buffalo Development Co., 85 Lee, 98 Maurice, 42 Elk)
ExxonMobil- 503 Elk
Buffalo River BOA
15-49 acres



Access

190
S. Park Ave.
Bailey Ave.
Elk St.
Babcock St.
Seneca St.
Clinton St.
Filmore

Context

Schools:

Southside Elementary School

Retail & Entertainment:

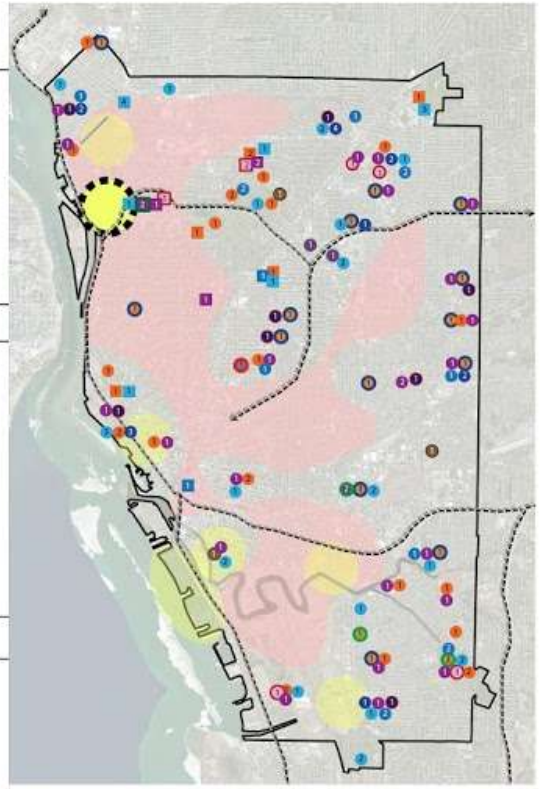
Larkinville

Parks & Recreation:

Houghton park (1 Football, 1 Soccer,1 Softball, 3 BBall, 4 Tennis)
Franczyk park (3 Prac. Soccer, 2 Softball, 1 BBall, 2 Half-BBall)
Boone park (1 Softaball, 1 BBall)
Tift / Hartmann (1 Football, 1 Soccer, 1 L.L.)
Southside Elementary School Field (1 Football/ Soccer)

Tee-to-Green

189, 191, 205 Tonawanda St. (25 acres)
69 Dearborn (7 acres)
Tonawanda Corridor BOA
1 owner



Access

190
198
Tonawanda St.
Amherst St.
Niagara St.
Forest Ave.
Grant St.

Bus Routes: 5, 32, 40
Scajaquada Bike Trail

Context

Schools:

Buffalo State College
McKinley H.S.
Math & Science Prep School

Retail & Entertainment:

Wegmans
Regal Movie Theatre
Elmwood Ave.

Parks & Recreation:

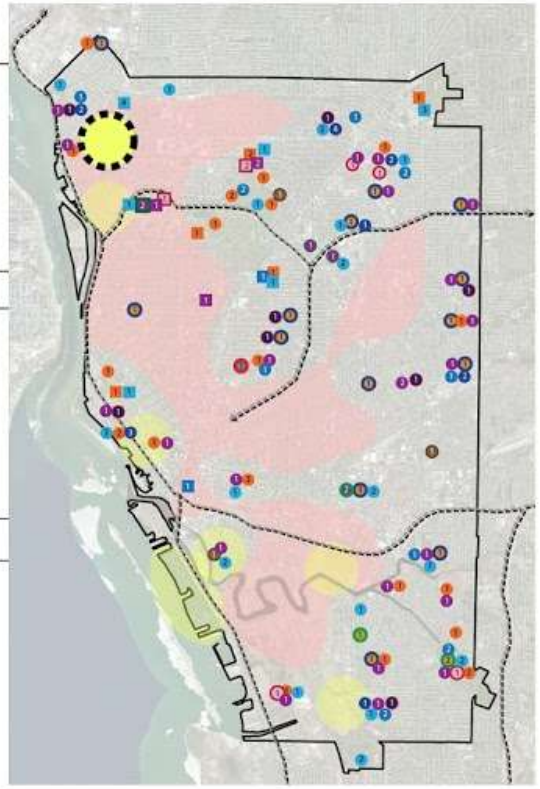
Squaw Island

Buffalo State Fields (1 Softball, 1 Football, 1 Prac.)

Delaware park (1 football, 5 soccer, 2 hardball, 1 softball, 4 BBall, 17 tennis)

Black Rock Yard

300 Hertel Ave.
Tonawanda Corridor BOA
28.6 acres
1 owner



Access

Hertel Ave.
190
198
Niagara St.
Amherst St.

Tonawanda St.
Bus Routes: 5, 23

Context

Schools:

McKinley H.S.
Riverside H.S.
Math & Science Prep School
Buffalo State College

Retail & Entertainment:

Wegmans
Regal Movie Theatre
Elmwood Ave.
Hertel Ave.

Parks & Recreation:

Private Softball fields (4)

Riverside H.S. Field (1 Football/Soccer)

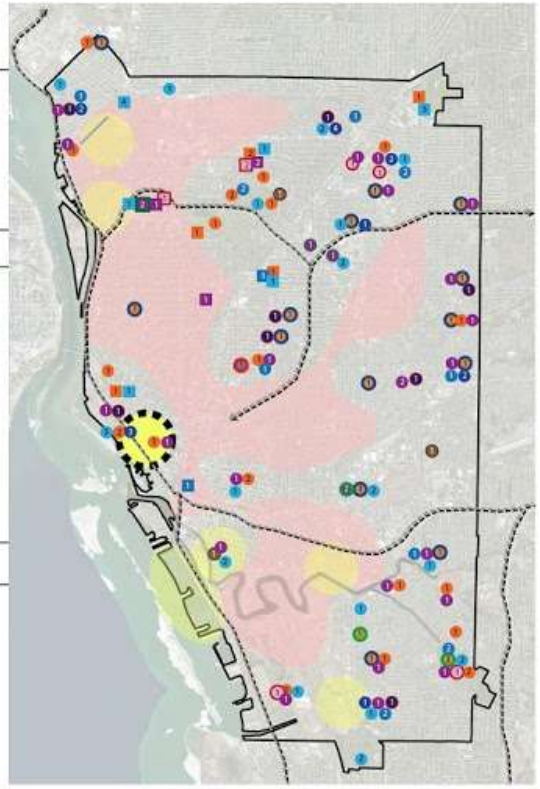
Buffalo State Fields (1 Softball, 1 Football, 2 Prac.)

Delaware park (1 football, 5 soccer, 2 hardball, 1 softball, 4 BBall, 17 tennis)

Riverside park (1 Football, 1 hardball, 1 softball, 2 L.L., 1 T-ball, 2 BBall, 2 Tennis)

Waterfront

43 Carolina
Buffalo Harbor BOA
15+ acres



Access

190
33
Skyway
Delaware Ave.
Niagara St.
Elmwood Ave.
Division St.

Peace Bridge
Virginia St.
Subway
Bus Routes: 1, 2, 4
Close to Riverwalk Bike Trail

Context

Schools:

Hutch Tech.
Waterfront School
ECC
D'Youville

Retail & Entertainment:

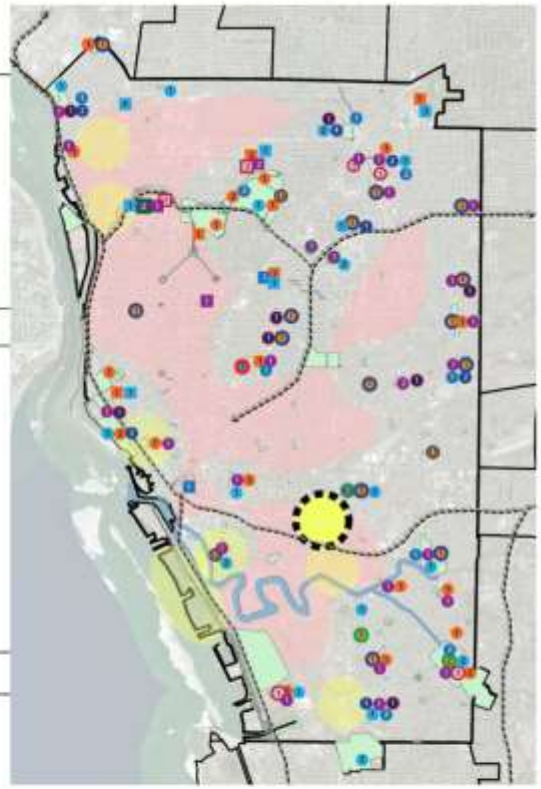
Downtown
Dipson Market Arcade
Theatre District
Chippewa
Kleinhans

Parks & Recreation:

Harbor Center
Erie Basin Marina
Naval park
Coca Cola field
Times Beach & Wilkenson Point
Front park (1 soccer)
JFK park (1 football, 2 soccer, 1 softball, 3 BBall, 4 tennis)
Waterfront park (1 football, 2 soccer, 1 softball backstop)
LaSalle park (1 football, 2 soccer, 3 softball, 3 L.L., 1 T-ball)

1070 Seneca St.

90 Hopkins St. (COB owned) (9 acres)
40 Hopkins St. (LRQ) (8 acres)
21.5 acres
[City Engineering facilities at 1120 Seneca, potential 6 acres]



Access

190 Seneca St.
Clinton St.
Smith St.
Bailey Ave.

Bus routes: 6, 15, 103

Context

Schools:

PS 26

Bilingual Center

Retail & Entertainment:

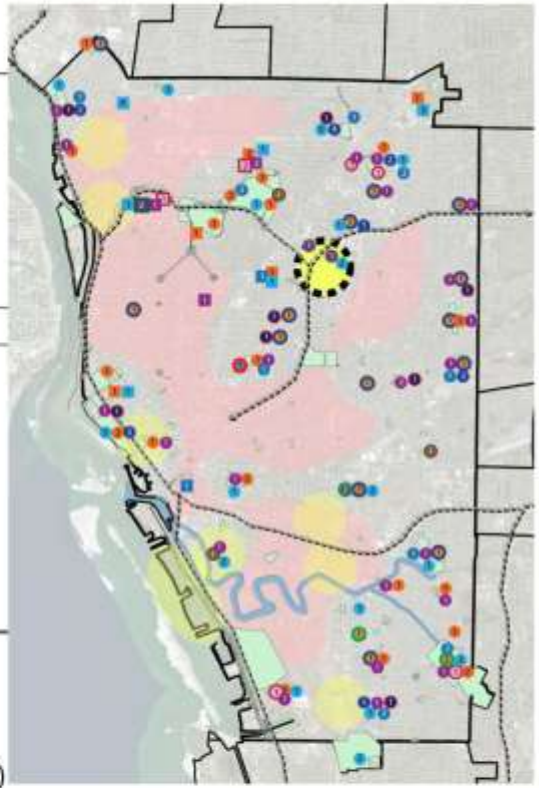
Babcock Boys and Girls Club
Larkinville

Parks & Recreation:

Red Jacket River Front Park
Franczyk Park (1 Football prac., 2 Soccer, 1 Softball, 3 BBall, 4 Tennis)

Kensington Heights

1827 Fillmore Ave.
Owned by BMHA
17 acres
Unused ECMC parking lot (1825 Fillmore Ave.) 4.5 acres



Access

33
Fillmore Ave.
Delevan Ave.
Humboldt Pkwy.

Bus routes: 6, 23, 102, 111

Context

Schools:

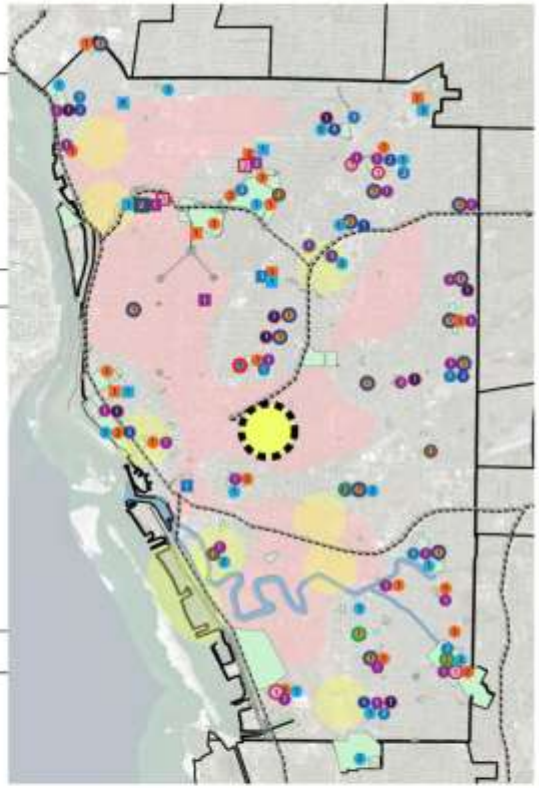
Canisius College
St. Marys School for the Deaf
Dr. Lynda T Wright School
PS 84
Seneca HS
Burgard Vocational HS
UB School of Medicine

Parks & Recreation:

Trinidad Park (1 short Football, 2 BBall)
Glenny Park (1 Football, 2 Softball, 2 BBall)
Dewey Park (1 Soccer prac., 1 Softball, 1 L.L., 3 BBall)

Buffalo Forge

490 Broadway
Adjacent parking at 498 Broadway and 213, 187 and 233 Mortimer
8 acres (plus additional 4 acres with adjacent parking)
Single owner (Buffalo Forge/Howden Fan)



Access

33 Bus routes: 4, 6, 18, 19
Broadway
Jefferson Ave.
Sycamore St.
Genesee St.
William St.

Context

Schools:

PS 41
PS 12
Bryant Stratton College

Parks & Recreation:

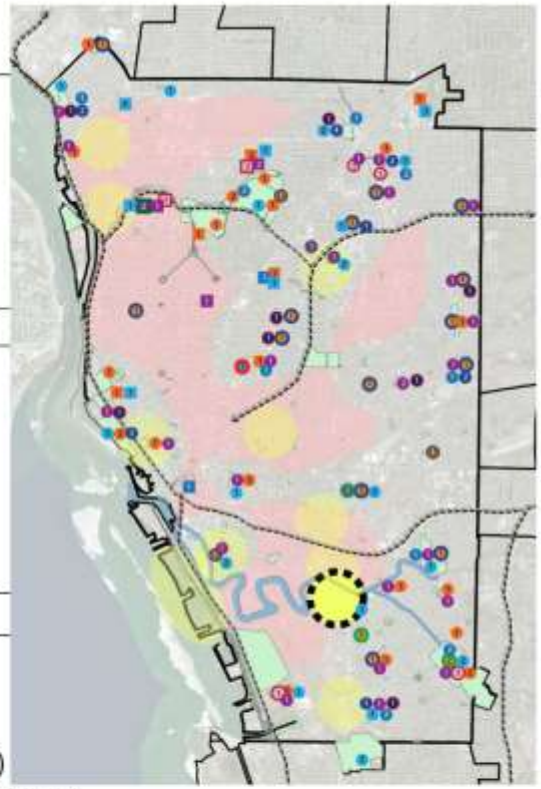
Willert Park (2 BBall)
JFK Park (1 Football, 2 Soccer, 1 Softball, 3 BBall, 4 Tennis)

Retail & Entertainment:

Buffalo & Erie Public Library
Downtown

Village Farms/Hydroponics/Pork Pie

1176 S. Park Ave. (Owned by city-sponsored development corp.)
1216 S. Park Ave.
33 acres



Access

South Park Ave.
Tift St.
190
Bailey Ave.

Bus routes: 14, 16, 23, 101, 111

Context

Schools:

Bilingual Center

Retail & Entertainment:

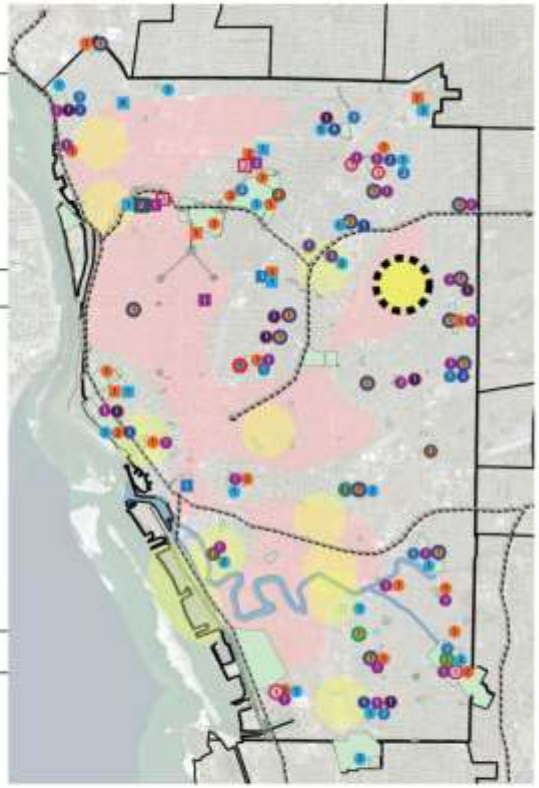
Outer Harbor
Tift Nature Preserve
Larkinville

Parks & Recreation:

Boone park (1 Softball, 1 BBall)
Durant park (1 small Soccer, 1BBall)
Red Jacket River Front Park

American Axle

1001 E. Delevan Ave.
5-8 acres



Access

Bailey Ave. Bus routes: 19, 26, 102
33
E. Delevan Ave.
E. Ferry St.
Genesee St.

Context

Schools:

PS 23
Seneca HS
East HS
PS 84
Dr. Lynda T Wright School

Retail & Entertainment:

Bailey Ave.

Parks & Recreation:

MLK Jr. Park (2 BBall, 4 Tennis)
Walden Park (1 Football, 1 Soccer prac., 1 Hardball, 2 L.L.)
Dewey Park (1 Soccer prac., 1 Softball, 1 L.L., 4 BBall)
Schiller Park (1 Football, 1 Soccer prac., 1 B-Ball

Table Fourteen is completed using high-medium-low designations so as to allow for a standardized comparison of the 11 individual locations.

Table Fourteen: Target Location Comparative Analysis

	Primary Criteria								Secondary Criteria		
	Massable Acreage Available	**Major Street Access**	**Existing Traffic Controls**	**Vehicular Traffic Visibility**	**Proximity to Complementary Development**	**High-Volume Vehicle Capability**	**High Noise Level Ability**	**Ability to Secure Property Perimeter**	**Proximity to Shareable Public Property**	**Ability to Install Outdoor Lights**	**Proximity to Safe/ Walkable Parking**
1. 90 Hopkins Street	Med	High	Med	Low	Med	High	High	High	Low	High	Med
2. Outer Harbor	High	High	High	High	High	High	High	Med	Med	High	Med
3. Elk Street	High	High	High	Med	High	High	High	High	Low	High	Low
4. Emerson Young Park	Med	High	High	High	Low	High	Low	Med	High	Low	High
5. Tee-to-Green	High	High	High	Med	Low	High	High	High	Low	High	Low
6. Black Rock Yard	High	High	High	Low	Low	High	High	High	Low	High	Low
7. 1070 Seneca Street	High	High	High	Med	Low	High	High	High	Low	High	Low
8. Kensington Heights	High	High	High	High	Med	High	High	High	High	High	High
9. Buffalo Forge	Low	High	High	Med	Low	High	Med	Med	Med	Med	Low
10. Village Farms	High	High	High	Med	Med	High	High	Med	Med	High	Med
11. American Axle	Low	Med	High	Med	Low	Med	Med	Med	Low	Low	Low

Source: Paradigm Economics

Table Fourteen would indicate that with respect to the key primary location criteria of massing ability of necessary acreage, seven of the 11 target locations (Outer Harbor, Elk Street, Tee-to-Green, Black Rock Yard, 1070 Seneca Street, Kensington Heights, and Village Farms) have enough of a footprint so as to allow for both initial facility development, as well as expandability of the indoor-outdoor complex should marketability and operating characteristics of a new facility indicate that business operation expansion is appropriate.

IX. CONSTRUCTION COST ESTIMATION

Based on the demand, market, and comparables findings articulated in earlier sections of this study, the Paradigm study group endeavored to generate a set of preliminary construction cost estimates based on the indoor-outdoor turf field complex facility type that was elevated to priority status within the new facility type option evaluation.

In this effort, Spicer Group, general construction and construction management specialists, was given a set of facility parameters that represented a ***base case*** construction project for a new indoor-outdoor turf field complex. As a *base case* project, the parameters established and provided to Spicer Group address a conservative construction scenario, and one that allows for either a phased or some other form of future expansion to either the indoor and/or outdoor facility component based on demonstrated and validated user group demand and revenue-generating capability.

Base Case Facility Parameters

Based on predominant user group needs, recommendations, and requirements that were generated through the market supply and demand sections interview process, a set of preliminary base case facility parameters were developed that reflected the indoor, outdoor, and support space construction specifications that would support a conservative construction scenario within the indoor-outdoor turf field facility type. These parameters were transferred to Spicer Group for construction cost estimating purposes, and are articulated as follows:

- One (1) 330’x210’ indoor turf field surface;
- Two (2) 180’x300’ outdoor field surfaces;
- Two (2) 240’x360’ outdoor field surfaces;
- Paved parking for 200 vehicles (@325 SF/space);
- Interior support space that includes retail, administration, food service, lavatories, and storage;
- Adequate interior circulation space;
- Basic Butler building-type metal clad structure and materials;
- HVAC system that allows for year-round utilization of indoor spaces;
- 50’ ceiling height over indoor playing surface;
- Security fencing around the footprint perimeter.

Construction Cost Methodology and Calculations

Spicer Group developed their facility cost estimates using separate CSI division designations. A 15% contingency cost was included in the overall cost at this preliminary pricing stage; this contingency number would be reduced as more accurate numbers became available through an actual facility design process.

The Spicer Group estimates also include some facility equipment (i.e. rolling grill for concessions, goal frames and nets) as well as some safety protection (pole padding, spectator netting), all of which would be typically included in an inventory of FF&E (furniture, fixtures, and equipment), which is not included in this estimate.

A cost of $26.00 per SF was utilized for the building structure, and bathrooms, HVAC, and electrical work and materials are priced so as to meet local building codes.

A complete preliminary construction cost estimation is provided below as Table Fifteen.

Table Fifteen: Preliminary Construction Cost Estimation

		Subcontract	Material	Labor	Equipment	Total
	General Conditions @5%	476,303				476,303
	Architectural Design	90,000				90,000
	Engineering & SWPP	60,000				60,000
	Infrastructure	67,500				67,500
	Site work incl. 2 small grass fields	436,500				436,500
	Fencing (4,120 LF @6' Chain Link + 2-24' Gates)	39,140				39,140
	Pavement and Walks	253,750				253,750
	AstroPlay Surface for 3 Fields	2,042,400				2,042,400
	Concrete Reinforcing	664,766				664.766
	Masonry Work	33,958				33,958
	Millwork	8,750				8,750
	Interior Plywood Liner	64,350				64,350
	Door Frames & Hardware	11,000				11,000
	Aluminum Storefronts	8,050				8,050
	Metal Studs-Drywall and Acoustic	30,500				30,500
	Floor Covering	5,500				5,500
	Painting	21,000				21,000
	Ceramic Tile	14,700				14,700
	Toilet Accessories and Partitions	2,450				2,450
	Rolling Grill (s) for Snack/Retail Area	3,000				3,000
	Sports Equipment (Frames and nets)	42,900				42,900
	Bleachers (8 sets of 4 rows by 21' long)	28,000				28,000
	Metal Building w/ Erection	2,355,000				2,355,000
	Spectator Netting	54,000				54,000
	Plumbing	54,000				54,000
	HVC	285,000				285,000
	Pole Padding	18,600				18,600
	Electrical	480,000				480,000
	Landscape Allowance	40,000				40,000
	Bond				88,507	88,507
	Subcontractor Bonds					
	Tax					
29641	Insurance Requirements	29,641				29,641
	Contingency 15%	1,574,802				1,574,802
A	**Subtotal**	**9,437,560**			**88,507**	**9,526,067**
B	Overhead (Percentage)	3.00%	3.00%	3.00%	3.00%	
B	Overhead (Amount)	283,127			2,655	285,782
C	Profit (Percentage)	7.00%	7.00%	7.00%	7.00%	
C	Profit (Amount)	680,448			6,381	686,829
B+C	Totals (Percentage)	10.21%	10.21%	10.21%	10.21%	
B+C	Totals (Amount)	963,575			9,037	972,611
A+B+C	**Totals (bond included)**	**$9,720,687**			**$91,162**	**$10,498,678**

Source: Spicer Group

Table Fifteen indicates that a total construction cost for the indoor-outdoor turf field facility is estimated to be $10,498,678, which includes some soft costs (design, engineering), insurance, bonding, as well as some equipment costs.

Geographic Footprint for Indoor-Outdoor Turf Field Complex

The size/dimension for the layout of the preliminary facility complex that includes an indoor building, parking areas, and four (4) outdoor fields is estimated to be a rectangle of 21 acres.

The 21-acre total includes approximately 13 acres for the building, parking lots, and outdoor fields, and an additional eight acres of outdoor circulation, landscaping, and auxiliary space.

Facility Expansion Opportunity and Considerations

Consideration was given in the facility construction to potential expansion of the indoor space so as to include over time additional turf areas. Addition of auxiliary indoor space could be accommodated in a second phase of construction, on either the long or short side of the primary indoor facility.

Consideration of additional construction would need to be applied in the first construction phase in determining a final layout of indoor and outdoor spaces on the geographic footprint, so as to allow for the most efficient attachment of a new space to the existing building. This would also impact the size and dimension of the geographic property footprint on which the original construction project takes place.

X. FINANCIAL OPERATIONS ANALYSIS

Based on the design program selected for the proposed indoor-outdoor turf and field sport center (one full-sized indoor turf field, four outdoor turf and natural grass fields), a set of assumptions were generated that provided the basis for a preliminary financial performance analysis for the proposed facility operation that is indicative of financial performance expectation using one set of key assumptions and operational expectations. Consistently-apparent characteristics of indoor facilities both inside and outside of Western New York were kept top of mind in developing the financial performance model and strategy. A summary of these key characteristics includes but is not limited to the following:

- A private legal structure and operation (either for-profit or not-for-profit) is preferred based on the almost exclusive appearance of this legal structure in other markets throughout the state, as well as in Western New York;

- The business operation essentially has a 6-month revenue period (November-April), with limited revenue generation occurring during the seasonal market's outdoor/warm weather period (May-October);

- As is the case with indoor field sports activity projects, and unlike indoor ice rink operations, the facility will be required to internally develop, market, and administer a variety of leagues and programs including but not limited to youth and adult soccer, flag football, and similar.

Other key characteristics for the cash flow model have been preliminarily selected for illustrative purposes, and are described as follows:

- Indoor utilization reflects a 90% utilization of available prime time hours;

- Not-for-profit legal status has been selected and applied, which allows for solicitation of grants, donations, and pledges. This also allows the facility to forego property tax payments and good and services taxes, eliminating those line items from the expense budget, which offers relief to the overall annual operating budget;

- A management company line item is included in the expense budget, which reflects the opportunity for experienced indoor/outdoor recreation facility operators to oversee day-to-day facility operation for ownership on a contract basis;

- Indoor field utilization is expected to include a combination of league and tournament play (run by the facility) and straight rentals by outside user groups. Also expected is high-to-low utilization volume with soccer as the high-volume sport, followed by lacrosse, field hockey, flag football, kickball, and softball training; and

- An 80% loan over 25 years on a construction budget of $10,498,678 at 6.5% has been factored in as an expense.

Cash Flow Model Summary

The preliminary cash flow model includes revenues from indoor and outdoor field utilization ("Total Usage Revenue"), as well as non-rental revenues that include concessions revenues (net), field sponsorship rights, revenues from grants, donations, and pledges, and sponsorship package revenues ("Ancillary Revenues").

The expense side of the cash flow model includes expense line items such as payroll (facility management, sports coordinators), utilities, management company fee, telephone/internet, insurance, building/grounds maintenance, equipment replacement fund, office expenses and supplies, contract services, legal and accounting fees, and marketing.

Total revenues are aligned against total expenses to generate a net cash flow figure. This net cash flow figure represents the cash that is available to the facility owner to make loan/mortgage payments that are incurred to purchase property and for building development/construction. For purposes of this financial performance modeling exercise, those payment obligations have not been estimated or included as line items in the expense side of the cash flow model.

Table 16 provides a summary of the facility's preliminary cash flow estimation. A full articulation of the 12-month cash flow model can be found in the report Appendix.

Table 16 – Summary – Preliminary Cash Flow Model

Revenue	
Indoor Fields	$686,098
Outdoor Fields	$396,000
Other Uses	$20,000
Ancillary Revenues	$72,000
Total Revenues =	**$1,174,098**
Expenses	
Total Expenses =	**$1,099,172**
Net Cash Flow =	**$74,926**

XI. ECONOMIC IMPACT ANALYSIS

Projected economic impact for a geographically-defined community can be an important consideration in the decision-making process utilized to consider the making of a significant economic development investment in a live entertainment/sports tourism-based development project and its long-term operation. At the funding stage of a proposed indoor sports-recreation facility development effort, a strategic objective expressed by the BUDC is to specifically ascertain the quantifiable benefits of the project, as determined by rigorous input-output economic impact analysis.

In that effort, Paradigm has undertaken a comprehensive analysis of the overall regional economic impact that a new indoor sports-recreation facility development/operations project might generate, so that this estimation could be integrated and measured against the estimation of projected economic self-sufficiency determined of the development and its ongoing operations.

Key Areas and Assumptions Test

The assessment of overall economic impact generated by a new development project and its operation contained the following key elements:

- Determination of economic impact generated by construction, operations, and generation of incremental visitors to the market; and

- Measurement of direct, indirect, and induced effects generated by the project.

Introduction and Impact Summary

Any economic impact generated by the proposed development project and business operation can be attributed to two distinct occurrences:

1. Construction – a one-time only event that we are assuming for purposes of this calculation would take place within the next 1-2 year period; and
2. Operation of the facility – ongoing business operation at relatively stabilized levels (i.e. consistent revenues, expenses).

Method of Analysis

The input-output multiplier approach was used to estimate the economic benefits related to the construction and operation of the proposed indoor sports-recreation facility. In performing these analyses, direct spending in the relevant economy (defined as Erie

County) was estimated. Then factors were used to estimate the multiplied effects of this spending on output and employment in the defined geographic economy. Economic impact or benefits are traditionally expressed in terms of increases in sales volume, employment, income and fiscal revenues.

The economic impacts estimated in this report consist of construction (temporary), operating (permanent), and on-going visitation (permanent) impact. For purposes of definition, economic *output* is the spending in the economy related to the proposed facility's operations and development. This measure of economic activity includes direct spending plus re-spending generated through the multiplier effect. Jobs created in the economy, measured in full-time equivalent jobs (FTEs), as a result of the economic output directly related to the proposed facility's stabilized operations and construction and indirectly related through the multiplier effect is *employment* impact. *Labor income* impact represents both employee salaries and wages plus business bonuses and commissions and the like.

Limitations of Input-Output Models

To quantify economic impact in each case, we utilized IMPLAN, an industry-accepted input-output model, to derive multipliers (see Appendix One). There are two fundamental limitations of input-output models:

- It is generally assumed that no substitution across expenditure categories occurs, when in fact, substitution does occur. If residents would otherwise have spent dollars on other local activities versus in association with the proposed facility, it could be argued that a facility would not be responsible for any increase in local spending.

  Conversely, if "facility dollars" spent by local residents would otherwise have been used for activities outside the local area, then these dollars do not merely represent displaced spending, but without the proposed facility, the area would continue to lose these funds. In other words, it is assumed that none of the spending amounts used as inputs for the models represent "displaced spending" or that without the proposed development, incremental business activity generated from events utilizing a new facility would take place outside of the State.

- Second, it is assumed that excess capacity in business employment does not exist. In other words, if area enterprises employ sufficient staff to accommodate a larger volume of sales, it is unlikely that a higher level of sales will cause additional employment.

Impact Levels

Economic impact is typically measured on three levels. As defined by the IMPLAN model, these are:

> *Direct Effects* – the impacts (e.g. changes in employment) for the expenditures and/or production values specified as direct final demand changes;
>
> *Indirect Effects* – the impacts caused by the iteration of industries purchasing from industries resulting from direct final demand changes; and
>
> *Induced Effects* – the impacts on all local industries caused by the expenditures of new household income generated by the direct and indirect effects resulting from direct final demand changes. Induced effects may also reflect government or investment expenditures."

Economic impacts or benefits are traditionally expressed in terms of increases in sales volume, employment and income resulting from the "export" of goods and services from and the "import" of new spending into an economy.

> *Economic output* is the spending in the economy related to the proposed facility's development and operations. It represents changes in sales volume or increases in a region's local aggregate economic activity resulting from new dollars "imported" into an economy. In other words, it is the total dollar flow of the major economic sectors (wholesale, retail, manufacturing and service) and is generally equivalent to the gross product of a given area. This measure of economic activity includes direct spending plus re-spending generated through the multiplier effect.
>
> Because of the changes in sales volume, local enterprises, depending on their excess capacity, may need to hire additional employees. Jobs created in the economy, measured in full-time equivalent jobs (FTEs), as a result of the economic output directly related to facility operations and construction and indirectly related through the multiplier effect is employment impact.
>
> *Labor impact (often referred to as "Personal Income")* represents changes in County residents' earnings resulting from increased employment and spending due to the "import" of new dollars into an economy.

The Multiplier Effect

Economic impacts from operations of the proposed indoor sports-recreation facility are defined as total expenditures generated from facility visitors ("direct spending") and the indirect benefits which result as these dollars are re-spent within the area. These indirect

benefits that result from subsequent rounds of spending are often referred to as the "multiplier" effect. All attendees to the subject facility are considered to generate economic impact.

The multiplier concept recognizes that income is spent in successive rounds within a community and that these "chain reactions" create an economic impact in excess of the original expenditure and employment levels. For example, each dollar collected by the proposed facility will eventually recycle, or multiply itself, creating many levels of economic activity in an area. As a prospective employer, the proposed race track facility pays wages; these wage earners, in turn, make purchases from local businesses. As taxpayers, all businesses and individuals benefiting from or adding incremental revenue to the economy also confer revenue to the community in terms of taxes. As a consumer, the proposed track project would buy goods and services from area businesses. Hence, the multiplier concept represents multi-level economic activity.

The multiplier effect is directly related to a region's geographic size, population and diversity of its industrial and commercial base. A larger population is generally able to support a more diverse economic base, and more products are likely to be manufactured and purchased locally rather than imported. Therefore, money injected into the economy is re-spent more often, causing greater changes in local business volume. In the case of the subject area, Erie County, the multiplier effects are somewhat more limited in that a significant portion of the impact might be felt by areas outside the County. For example, it is likely that, in large measure, the furniture, fixtures and equipment to be utilized for the proposed facility will be manufactured and shipped from areas outside of Erie County.

CALCULATIONS OF DIRECT AND INDIRECT IMPACT

Construction Impact

Significant non-recurring benefits will be generated by the construction of the facility due to major expenditures for labor and materials. Facility project development and construction cost documentation generated by Spicer Group estimates that total construction costs for the project (including site preparation, soft costs, but not land purchase) will be approximately $10,498,678 ($7,417,760 for construction, and $3,080,918 for bonding, soft costs and certain non-building equipment purchases).

The direct expenditures of $7,417,760 cause a “ripple” or “spin-off” effect, generating additional economic activity to numerous industries throughout the County. Using economic multipliers supplied by the federal government’s Bureau of Economic Analysis, and an input-output model derived by the IMPLAN Development and Applications (alternatively referred to as “Minnesota Implan Group”, abbreviated MIG), the total economic impact, which includes the “ripple” or “spin-off” effect from direct expenditures resulting from the development of the proposed facility was quantified. Multipliers were developed for every industry; the degree of impact within each sector is affected by its relationship and synergy with the economic impactor.

Applying the output, earnings and employment multipliers for the new construction expenditures across the various sectors of the Erie County economy yields the total direct and indirect impacts of the construction phase as shown in the table below.

IMPACT OF SITE PREP & CONSTRUCTION

Impact Summary

Impact Type	Employment	Labor Income	Output
Direct Effect	66.8	$3,196,756	$7,417,760
Indirect Effect	13.5	$772,878	$1,964,339
Induced Effect	21.0	$896,164	$2,651,473
Total Effect	101.3	$4,865,797	$12,033,572

Employment = Jobs
Labor Income = Employee Compensation + Proprietor Income (does not include benefits)
Output = Revenue (cost of consumption plus value added)

Notes

- These are annual figures. (Construction impacts would need to be adjusted to reflect the duration of the project if it was longer or shorter than a year).
- Site prep and construction were run as two separate models then aggregated. Sale/purchase of land was not included in construction model.
- Employment and income for the direct effect of the construction model are estimates derived by the program calculated from the project cost of $7,206,815 (does not include soft costs, i.e. bonding, contingencies, profit, other). If more accurate figures are available the model could be further refined.
- Site prep is considered separately, as it only generates indirect and induced impacts since it is essentially service and not product oriented.

Construction Impact Summary

- Based on the estimated hard construction project cost of $7,417,760 (including $436,500 in site prep), IMPLAN estimated the site prep and construction project will employ 66.8 FTEs, with a payroll of $3,196,756 **(direct effects).**

- Multiplied many times through levels of the supply chain, the site prep and construction creates a demand of $$1,964,339 worth of goods/services from the county economy. This requires 13.5 FTEs receiving a payroll of $772,878 (i**ndirect effects).**

- The spending from the direct & indirect FTEs' payroll creates a demand of $2,651,473 of goods and services from the local economy. This demand requires 21.0 FTEs, receiving a payroll of $896,164 (i**nduced effects).**

- The construction/site prep will have job impact of 101.3 FTEs with a payroll of $4,865,797 creating $12,033,572 of economic impact in Erie County (t**otal impact).**

Facility Operations Impact

Our calculation of impact related to operation of the facility was based, in large measure, upon the projected financial performance of the facility in operating year one as calculated by the Paradigm project team. Based on these financial projections, it was estimated that the facility would generate total revenues of $1,174,098 (expressed in current value dollars) in operating year one of the business operation. Output from the IMPLAN model based on these projections is as follows:

IMPACT OF FACILITY OPERATIONS

Impact Summary

Impact Type	Employment	Labor Income	Output
Direct Effect	6.0	$146,500	$1,174,098
Indirect Effect	2.1	$110,093	$314,420
Induced Effect	1.4	$57,729	$170,796
Total Effect	9.4	$317,322	$1,659,313

Facility Impact Summary

- The facility itself will employ 6.0 FTEs, with a payroll of $146,500. These employees create $1,174,098 worth of goods/services (**direct effects).**

- Multiplied through many times through levels of the supply chain, the facility creates a demand of $314,420 worth of goods/services from the county economy. This requires 2.1 FTEs receiving a payroll of $110,093 **(indirect effects).**

- The spending from the direct & indirect FTEs' payroll creates a demand of $170,796 of goods and services from the local economy. This demand requires 1.4 FTEs, receiving a payroll of $57,729 **(induced effects).**

- The facility will have job impact of 9.4 FTEs with a payroll of $317,322 creating a $1,659,313 economic impact in Erie County **(total impact).**

Non-Local Visitor Spending Impact

The area where additional economic impact can be expected will be related to “sports tourism” visitor spending if and as the existence of the facility draws new visitors to Erie County. Calculations of economic impact in this area would tie directly to the number of users estimated for the proposed facility, the percentage of those users who are likely to be from outside Erie County and the number of those who would be visiting the county with the proposed new facility as their primary destination.

Generated economic impact would result from the import of new dollars which are spent and retained locally. Spending by local residents would not be considered since it represents displaced spending.

As gathering of spending data from prospective outside users was not a component of this project scope, a “sports tourism” visitor spending impact calculation was not generated as a function of the overall project economic impact analyses. However, the project team did want to make known that this third area of economic impact exists that could be calculated once the proposed facility was up and running, and when spending habit details from non-local users and visitors could be determined.

XII. APPENDIX

A. Existing Conditions/Supply Analysis – Mapping Analysis

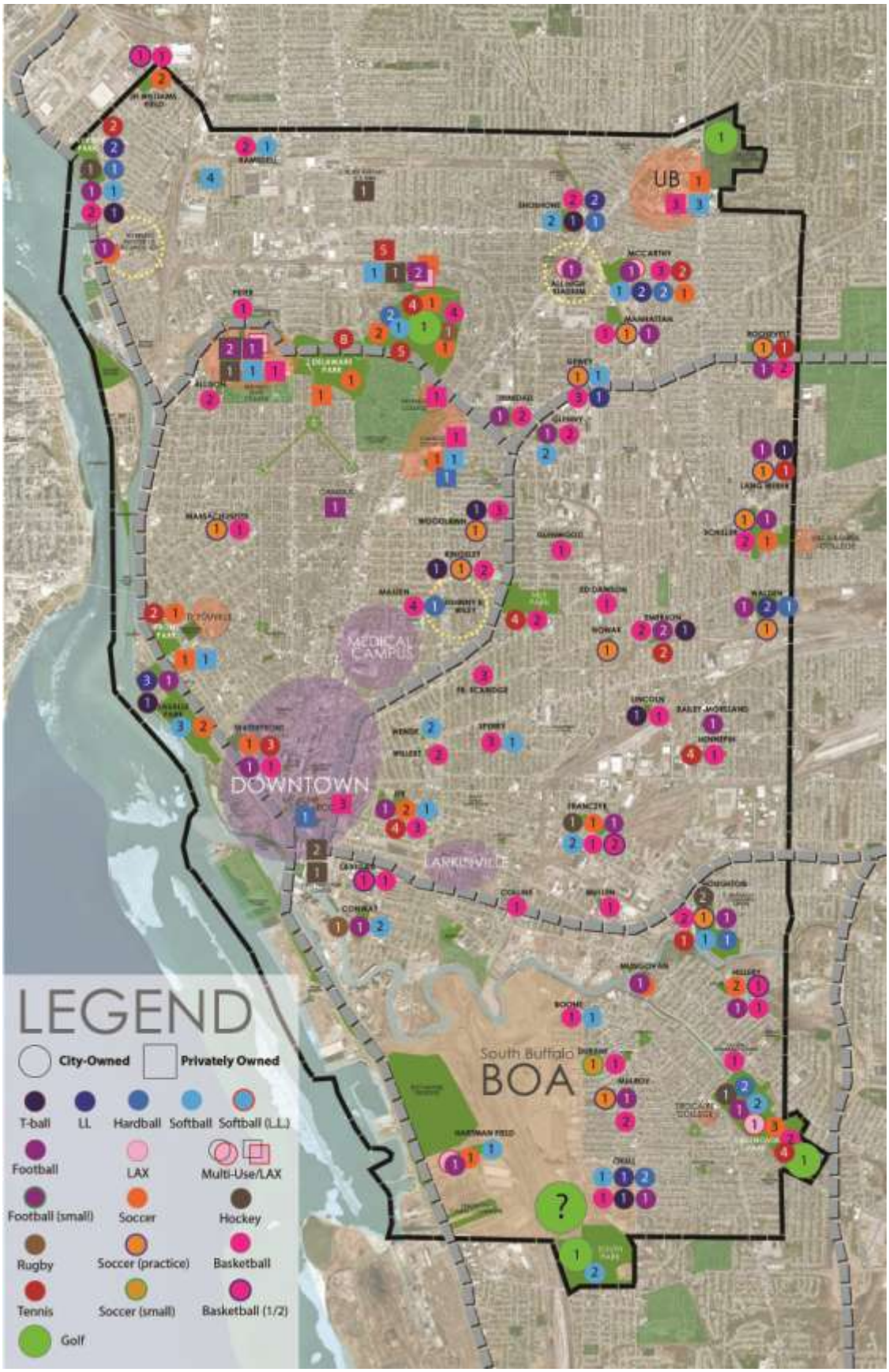
B. Cash Flow Model

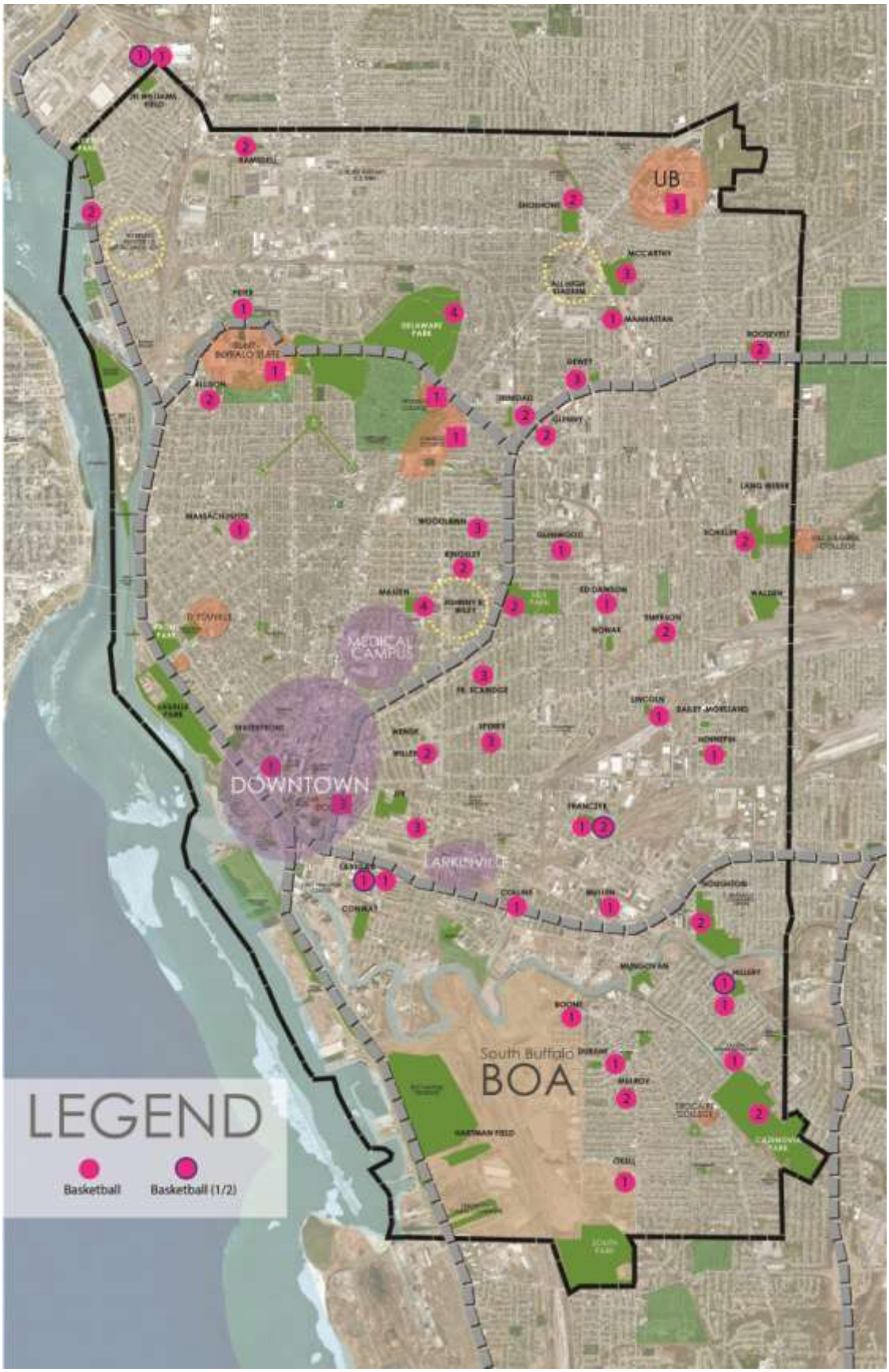
C. Economic Impact Analysis – Methodology Detail

E. Youth-Adult Soccer Field Requirements

D. Project Research – Information Source Summary

Appendix A. – Existing Conditions/Supply Analysis – Mapping Analysis


UB
MEDICAL CAMPUS
DOWNTOWN
LARKINVILLE
South Buffalo
BOA
LEGEND
City-Owned
Privately Owned
T-ball
LL
Hardball
Softball
Softball (LL)
Football
LAX
Multi-Use/LAX
Football (small)
Soccer
Hockey
Rugby
Soccer (practice)
Basketball
Tennis
Soccer (small)
Basketball (1/2)
Golf


UB
DOWNTOWN
MEDICAL CAMPUS
LARKINVILLE
South Buffalo
BOA
LEGEND
Basketball
Basketball (1/2)


UB
MEDICAL CAMPUS
DOWNTOWN
LARKINVILLE
South Buffalo
BOA
LEGEND
Football
Football (small)


UB
MEDICAL CAMPUS
DOWNTOWN
LARKINVILLE
South Buffalo
BOA
LEGEND
Golf
?

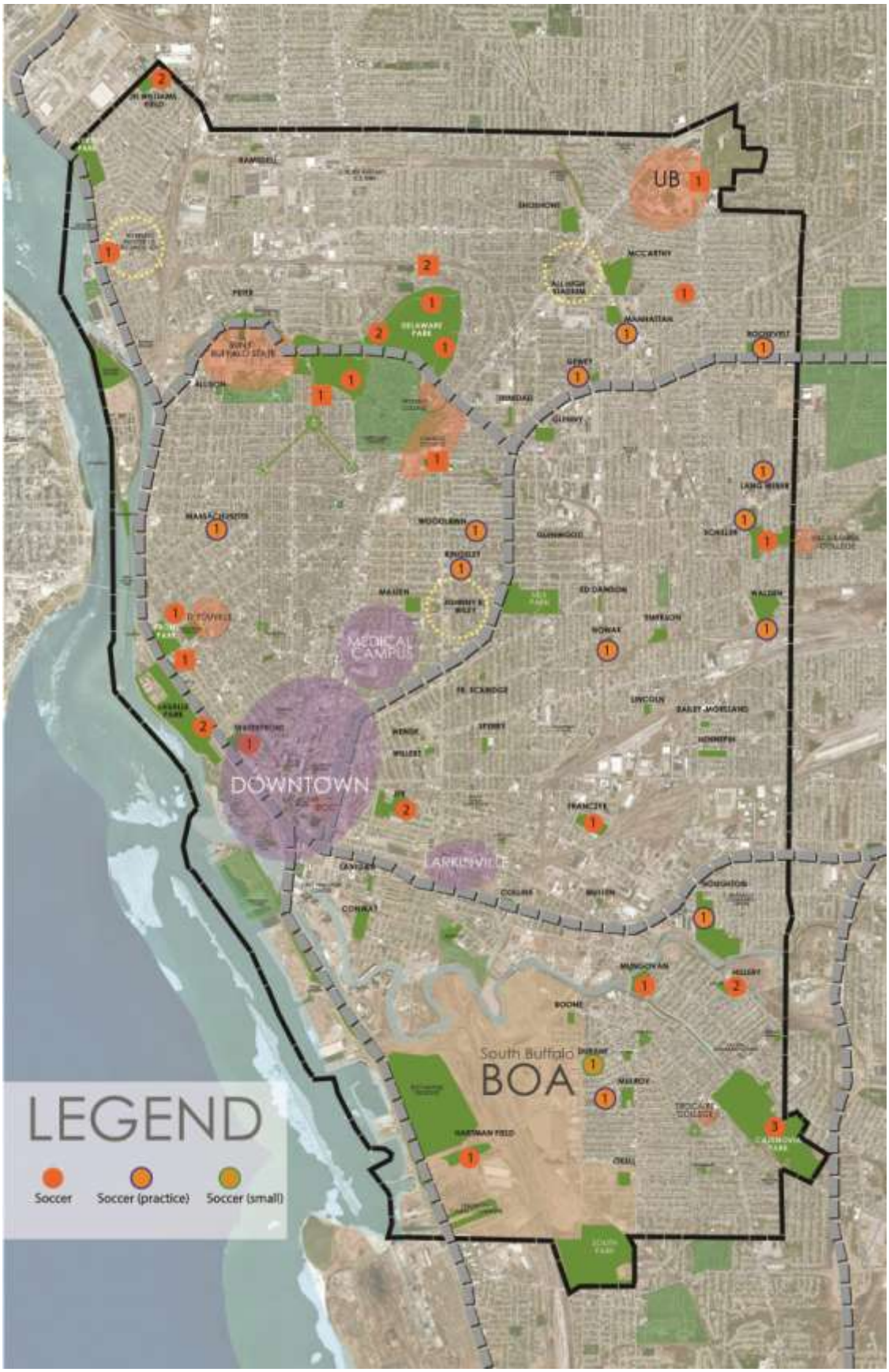

UB
MEDICAL CAMPUS
DOWNTOWN
LARKINVILLE
South Buffalo
BOA
LEGEND
Hardball


UB
MEDICAL CAMPUS
DOWNTOWN
LARKINVILLE
South Buffalo
BOA
LEGEND
Hockey


UB
MEDICAL CAMPUS
DOWNTOWN
LARKINVILLE
South Buffalo
BOA
LEGEND
Lacrosse


UB
MEDICAL CAMPUS
DOWNTOWN
LARKINVILLE
South Buffalo
BOA
LEGEND
Little League


UB
MEDICAL CAMPUS
DOWNTOWN
LARKINVILLE
South Buffalo
BOA
LEGEND
Rugby


UB
MEDICAL CAMPUS
DOWNTOWN
LARKINVILLE
South Buffalo
BOA
LEGEND
Soccer
Soccer (practice)
Soccer (small)


UB
MEDICAL CAMPUS
DOWNTOWN
LARKINVILLE
South Buffalo
BOA
LEGEND
Softball
Softball (L.L.)


UB
MEDICAL CAMPUS
DOWNTOWN
LARKINVILLE
South Buffalo
BOA
LEGEND
T-Ball


UB
MEDICAL CAMPUS
DOWNTOWN
LARKINVILLE
South Buffalo
BOA
LEGEND
Tennis

Appendix B. – Cash Flow Model

COB Turf Field Complex - Indicative Financial Performance Model

	Hours	Qty	Year 1	Year 2	Year 3	Year 1	Year 2	Year 3
IN SEASON:						OFF SEASON:		
Weekday Offtime (8-5)	9		20%			10%		
Weekday Primetime (5-11)	6		85%			25%		
Weekend (Sa 8-11, Su 8-6)	25		90%			25%		
Rates:								
Indoor Field Offtime	$80	3						
Indoor Field Primetime	$135							
Full Field	$275							
Cage	$25	4						

CASH FLOW MODEL - YEAR 1

REVENUE	Nov	Dec	Jan	Feb	Mar	Apr	May	Jun	Jul	Aug	Sep	Oct	**TOTAL**
Indoor Fields													
Weekday Primetime Usage	44,718	44,718	44,718	44,718	44,718	44,718	13,152	13,152	13,152	13,152	13,152	13,152	**347,223**
Weekday Offtime Usage	9,353	9,353	9,353	9,353	9,353	9,353	4,676	4,676	4,676	4,676	4,676	4,676	**84,175**
Weekend Usage	36,450	36,450	36,450	36,450	36,450	36,450	6,000	6,000	6,000	6,000	6,000	6,000	**254,700**
Outdoor Fields													
Weekday Usage	22,000	0	0	0	22,000	22,000	22,000	22,000	22,000	22,000	22,000	22,000	**198,000**
Weekend Usage	22,000				22,000	22,000	22,000	22,000	22,000	22,000	22,000	22,000	**198,000**
Clinics	1,000	1,000	1,000	1,000	1,000	1,000	1,000	1,000	1,000	1,000	1,000	1,000	**12,000**
Special Events	0	0	0	0	0	0	0	0	0	0	0	0	**0**
Summer Camps	0	0	0	0	0	0	0	0	4,000	4,000	0	0	**8,000**
TOTAL USAGE REVENUE	135,521	91,521	91,521	91,521	135,521	135,521	68,829	68,829	72,829	72,829	68,829	68,829	**1,102,098**
Net Food Concessions	4,000	4,000	4,000	4,000	4,000	4,000	0	0	0	0	0	0	**24,000**
Field Sponsorship Rights	2,000	2,000	2,000	2,000	2,000	2,000	2,000	2,000	2,000	2,000	2,000	2,000	**24,000**
Grants/Donations/Pledges	1,000	1,000	1,000	1,000	1,000	1,000	1,000	1,000	1,000	1,000	1,000	1,000	**12,000**
Sponsorship Packages	1,000	1,000	1,000	1,000	1,000	1,000	1,000	1,000	1,000	1,000	1,000	1,000	**12,000**
TOTAL REVENUE	143,521	99,521	99,521	99,521	143,521	143,521	72,829	72,829	76,829	76,829	72,829	72,829	**1,174,098**

EXPENSES													
Payroll - Facility Management	11,458	11,458	11,458	11,458	11,458	11,458	11,458	11,458	11,458	11,458	11,458	11,458	**137,500**
Payroll - Sports Coordinators	750	750	750	750	750	750	750	750	750	750	750	750	**9,000**
Management Company Fee	2,500	2,500	2,500	2,500	2,500	2,500	2,500	2,500	2,500	2,500	2,500	2,500	**30,000**
Utilities	12,500	12,500	12,500	12,500	12,500	12,500	12,500	12,500	12,500	12,500	12,500	12,500	**150,000**
Telephone/Internet	300	300	300	300	300	300	300	300	300	300	300	300	**3,600**
Insurance	2,500	2,500	2,500	2,500	2,500	2,500	2,500	2,500	2,500	2,500	2,500	2,500	**30,000**
Building/Grounds Maintenance	1,500	1,500	1,500	1,500	1,500	1,500	1,500	1,500	1,500	1,500	1,500	1,500	**18,000**
Equipment Replacement Fund	833	833	833	833	833	833	833	833	833	833	833	833	**10,000**
Office Expense/Supplies	300	300	300	300	300	300	300	300	300	300	300	300	**3,600**
Contract Services	750	750	750	750	750	750	750	750	750	750	750	750	**9,000**
Legal/Accounting Fees	500	500	500	500	500	500	500	500	500	500	500	500	**6,000**
Marketing	1,000	1,000	1,000	1,000	1,000	1,000	1,000	1,000	1,000	1,000	1,000	1,000	**12,000**
Loan Repayment - Construction (1)	56,706	56,706	56,706	56,706	56,706	56,706	56,706	56,706	56,706	56,706	56,706	56,706	**680,472**
TOTAL EXPENSES	91,598	91,598	91,598	91,598	91,598	91,598	91,598	91,598	91,598	91,598	91,598	91,598	**1,099,172**
NET CASH FLOW	51,923	7,923	7,923	7,923	51,923	51,923	(18,769)	(18,769)	(14,769)	(14,769)	(18,769)	(18,769)	**74,926**

(1) Assumes 80% of $10,498,000 at 6.5% over 25 years

Appendix C. – Economic Impact Analysis – Methodology Detail

The economic impact analysis estimating the economic and fiscal impacts of the CNYRP study was completed using the IMPLAN economic impact (or input-output) model. The IMPLAN model is used by more than 500 universities and government agencies to estimate the economic and fiscal impacts of investments and/or changes in industry, to forecast tax revenue and employment generation, and to conduct economic comparison studies of two or more geographic locations.

IMPLAN Economic Impact Analysis Description

IMPLAN is an input-output model. Input-output accounting describes commodity flows from producers to intermediate and final consumers. The total industry purchases of commodities, services, employment compensation, value added, and imports are equal to the value of the commodities produced.

An IMPLAN impact analysis involves specifying a series of expenditures and applying them to the region's economic multipliers. The expenditures are identified in terms of (1) the sectoring scheme for the model, (2) in producer prices, and (3) in historical dollars with the current year used as a base year. Only the dollars spent within the regional are multiplied to the model.

The notion of a multiplier rests upon the difference between the initial effect of a change in final demand and the total effects of that change. Total effects can be calculated either as direct and indirect effects, or as a combination of direct, indirect, and induced effects.

Direct effects are production changes associated with the immediate effects or final demand changes. Indirect effects are production changes in backward-linked industries caused by the changing input needs of directly affected industries (for example, additional purchases to produce additional output). Induced effects are the changes in regional household spending patterns caused by changes in household income generated from the direct and indirect effects.

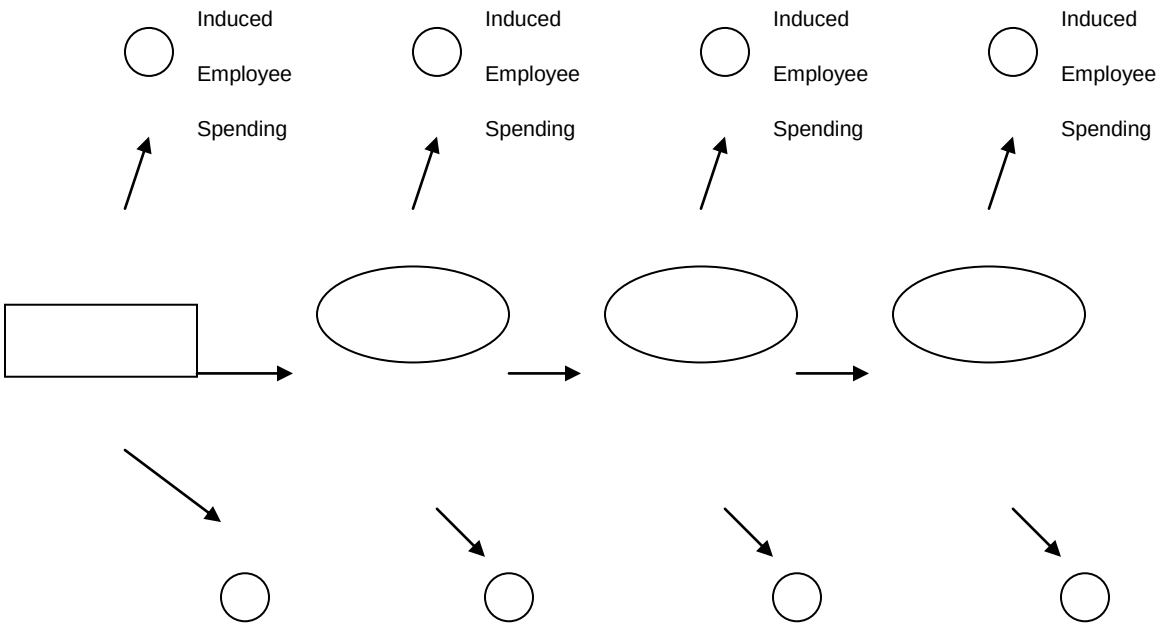
Purchases for final use (i.e. final demand) drive the model. Industries producing goods and services for final demand purchase goods and services from other producers. These other producers, in turn, purchase goods and services. This buying of goods and services (indirect purchases) continues until leakage from the region (imports and value added) stops the cycle.

These indirect and induced effects (i.e. the effects of household spending) can be mathematically derived. The resulting sets of multipliers describe the change of output for each and every regional industry caused by a one dollar change in final demand for any given industry.

Creating a regional input-output model requires a tremendous amount of data. The costs of surveying industries within each region to derive a list of commodity purchases (i.e. production functions) are prohibitive. IMPLAN was developed as a cost-effective means to develop regional input-output models. The IMPLAN data accounts closely follow the accounting conventions used in the “Input-Output Study of the U.S. Economy” by the Bureau of Economic Analysis (1980) and also the rectangular formula recommended by the United Nations.

To establish useful definitions, “economic impact” is also referred to as “economic output” or spending. This value represents all sales of goods or services either at the intermediate or final product (i.e. retail) level. Diagram One provides a graphical representation how direct spending, indirect spending, and induced spending occur as spent dollars flow through a designated geographic economy, and how jobs are created from this spending.

Diagram One



= Direct Spending and Effects

= Indirect Spending and Effects

= Induced Spending and Effects

Appendix D. – Youth-Adult Soccer Field Requirements

Adult Soccer Field Dimensions: The optimum size is 75 yards (68.58m) by 120 yards (109.73m).

Rules: The field of play shall be rectangular. Width shall not exceed the length. The width shall not be more than 80 yards (73.15M) nor less than 65 yards (59.44m)

The length shall not be more than 120 yards (109.72m) nor less than 110 yards (100.58m).

US Youth Soccer Field Dimensions

Age	Field Width	Field Length
Youth	**Min - Maximum**	**Min - Maximum**
U6 - U7	(15 - 20 yards)	(25 - 30 yards)
U8	(20 - 25 yards)	(30 - 40 yards)
U9	(30 - 35 yards)	(40 - 50 yards)
U10	(40 - 50 yards)	(60 - 70 yards)
U11	(40 - 50 yards)	(70 - 80 yards)
U12	(40 - 55 yards)	(100 - 105 yards)
U13	(50 - 60 yards)	(100 - 110 yards)
Adult	(65 - 80 yards)	(110 - 120 yards)
International	(70 - 80 yards)	(110 - 120 yards

Source: The Soccer Institute

Appendix E. - Project Research – Information Source Summary

1. Primary Research

○ *Public Sector Entities*

Buffalo Urban Development Corporation
City of Buffalo – Division of Parks & Recreation
City of Buffalo - Office of Strategic Planning
Empire State Development Corporation
Erie Canal Harbor Development Corporation
Erie County – Department of Planning
New York State

○ *Colleges and Private Schools*

Buffalo State College
Canisius College
Canisius High School
Daemen College
D'Youville College
Erie Community College
Medaille College
Nichols School
Tapestry Charter School

○ *Youth/Adult Recreational Sports*

Blackwatch Premier
Buffalo District Soccer League
Buffalo Soccer Council
Buffalo Social Club
Buffalo WNY Junior Soccer League
Delaware Soccer Club
Empire United
English Pork Pie Company
Fellowship of Christian Athletes/Niagara Power Baseball
FC Buffalo
Game On
M/ilesports

New York Premier Soccer
Police Athletic League (PAL)
Queen City Softball
Soccer Shots
South Buffalo Softball
UB Track
West Side Soccer
Youth Box Lacrosse

- ***Other***

The Buffalo Legacy Project/Pierce Field at Mulroy Park
Visit Buffalo Niagara/Greater Buffalo Sports Commission
The Wellness Institute

2. Secondary Research

- ***Documentation***

"American Fitness Index" (American College of Sports Medicine);
"City-Wide Parks Improvements Court Assessments" (Nussbaumer & Clarkee, Inc., 2012);
Lewiston (NY) Recreation & Senior Center – Program Plan;
"Park, Recreation, Open Space and Greenway Guidelines" (National Recreation and Park Association);
"Parks and Recreation National Database Report – 2012" (National Recreation and Park Association);
"Parks and Recreation National Database Report – 2014" (National Recreation and Park Association);
"Recreation, Park and Open Space Standards and Guidelines – 1983" (National Recreation and Park Association);
"Special Park District National Database Report " (National Recreation and Park Association);
"The Trust for Public Land, Center for City Park Excellence: 2014 City Park Facts";
"Time to Act: Investing in the Health of Our Children and Communities (Robert Woods Johnson Foundation, 2013);

- ***Websites***

American Fitness Index
Athletic Business
Buffalo District Soccer League
The Buffalo Legacy Project
The Buffalo News
Buffalo Rising
Buffalo School of Baseball
Buffalo Soccer Club
Buffalo Soccer Council
Buffalo State College
Buffalo Storm AAU Basketball
Buffalo Titans Basketball
Buffalo Wings Travel Baseball
Buffalo and WNY Junior Soccer League
Canisius High School
Canisius College
City of Buffalo (GIS maps section)
City-Data (City Top Lists)
City Parks Alliance
Daemen College
D'Youville College
Delaware Soccer Club
Empire United SA
Epic Center
Erie Canal Harbor Development Corporation
Erie Community College
Erie County
Go Bike Buffalo
Greater Buffalo Track Club
Medaille College
M/ilesports
National Recreation and Park Association
New Era Park
NYS West Youth Soccer Association
Nichols School
Pierce Field@Mulroy Park
Sahlens Sports Park
ShareRanks

Soccer Institute
SPIRE Sports Academy
Sport Center 481
Sports Performance Park
Tapestry Charter School
Total Sports Experience
Tournament Town (Brooklyn USA)
The Trust for Public Land
Visit Buffalo Niagara
Wallet Hub (2014 Best & Worst Cities for Recreation)
Wellness Institute