



SPORTS MARKET DEMAND & FACILITY OPPORTUNITY ANALYSIS FOR THE GREATER FREDERICK COMMUNITY

Prepared for Good Works Frederick // August 30, 2023

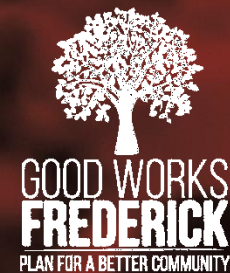




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Please Note: This report relies on a variety of information and assumptions to develop market, financial, and economic projections. Sources of information and assumptions include, but may not be limited to, information provided by Good Works Frederick, input and opinions provided by the client's relevant stakeholders and partners, Victus Advisors' industry experience and previous studies, and publicly available data from various industry sources. Any such information collected by Victus Advisors has not been audited or verified and has been assumed to be correct. There will be differences between actual events and the projections contained herein, and we express no assurances of any kind related to any projected information. Differences between projections and actual events may be material.



1. INTRODUCTION



PROJECT BACKGROUND



Victus Advisors (or “Victus”) was engaged in May 2023 by a Frederick-based non-profit, **Good Works Frederick** (or the “Client”), to conduct a comprehensive feasibility study (including market, financial, economic, conceptual, and construction analysis) for the proposed “Maryland Sports & Learning Campus”. Victus’ primary project goals for this study include:

Phase 1 - Sports Market Demand & Facility Opportunity Analysis **(Completed)**

- a) **Market Demand & Opportunity Analysis** - Analyze the Greater Frederick market area to identify any sports facility gaps and sports market opportunities.

Phase 2 - Quantitative Analysis & Initial Concept Plan Development **(Next Steps)**

- a) **Financial Operating Analysis** - Develop a custom financial operating model for the proposed complex.
- b) **Economic & Fiscal Impact Analysis** - Develop estimates of the economic and fiscal impacts that could be generated by a new sports complex in Frederick.
- c) **Concept Plans** - Preliminary building program, conceptual plans, and construction cost estimates for the recommended facilities/amenities.

The flow chart later in this section shows a more detailed visualization of our study methodology.



GOOD WORKS FREDERICK'S PROJECT VISION



It is our understanding that Good Works Frederick's initial vision for the proposed "Maryland Sports & Learning Campus" would be a multi-use sports, recreation, education, and wellness destination that could potentially include, but may not be limited to:

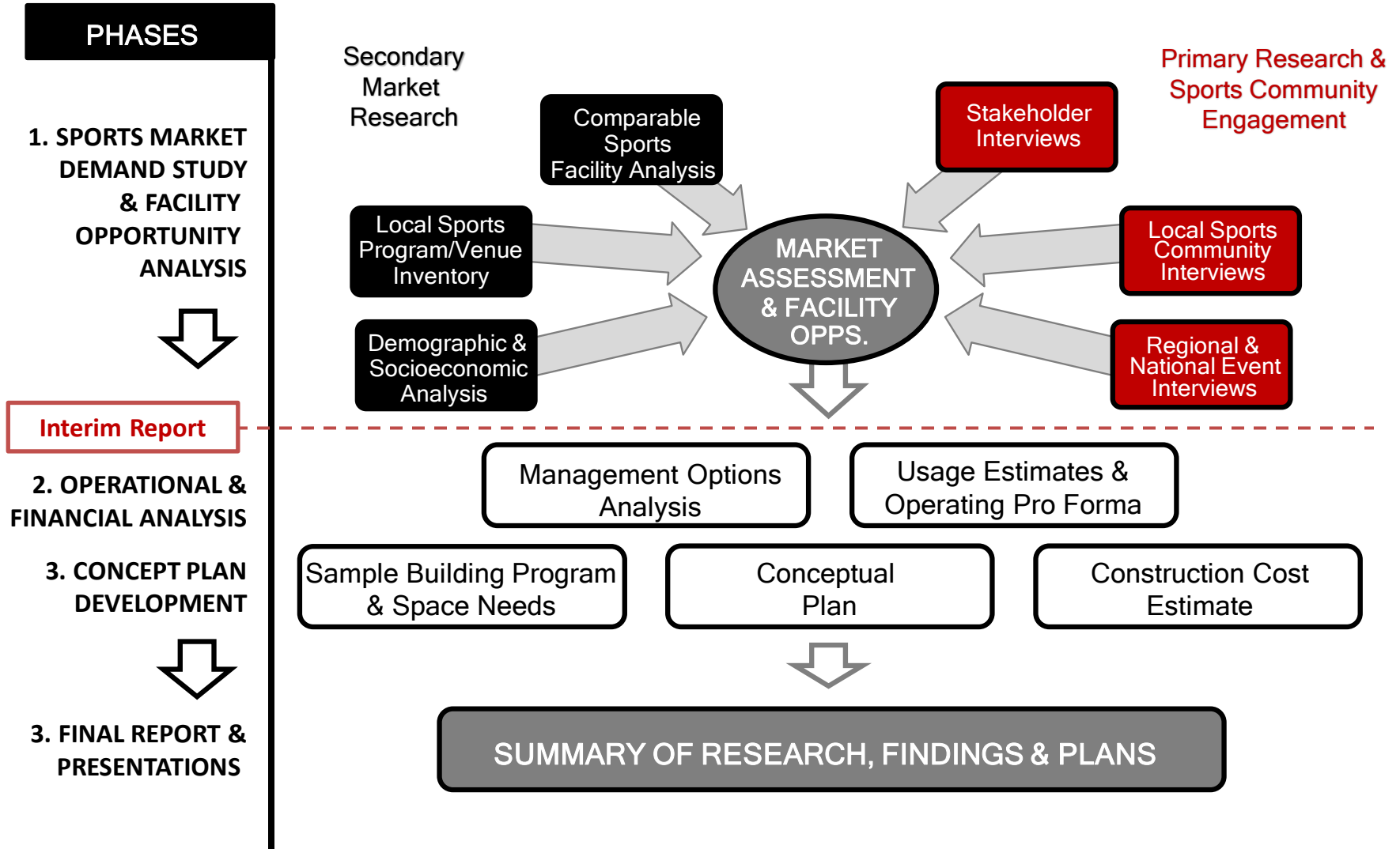
- Indoor sports center, potentially including amenities such as indoor track, swimming/diving, basketball, volleyball, and/or indoor soccer
- Outdoor sports complex, potentially including soccer fields, baseball/softball fields, and/or outdoor running track
- Other recreation, education, and wellness amenities such as a playground, center for aging and health, strength/conditioning center, sports medicine/rehab hub, and multi-purpose rooms for youth programs, community events, etc.

Good Works Frederick anticipates that such a project could have the following positive impacts within the Greater Frederick community:

- Invigorate underserved populations and areas of the community
- Attract scores of sports tourism guests annually
- Create thousands of area hotel bookings
- Generates tens of millions of dollars in local economic impact
- Create hundreds of jobs
- Promote the health of hundreds of Frederick County families
- Inspire, educate, and develop area youth



STUDY METHODOLOGY

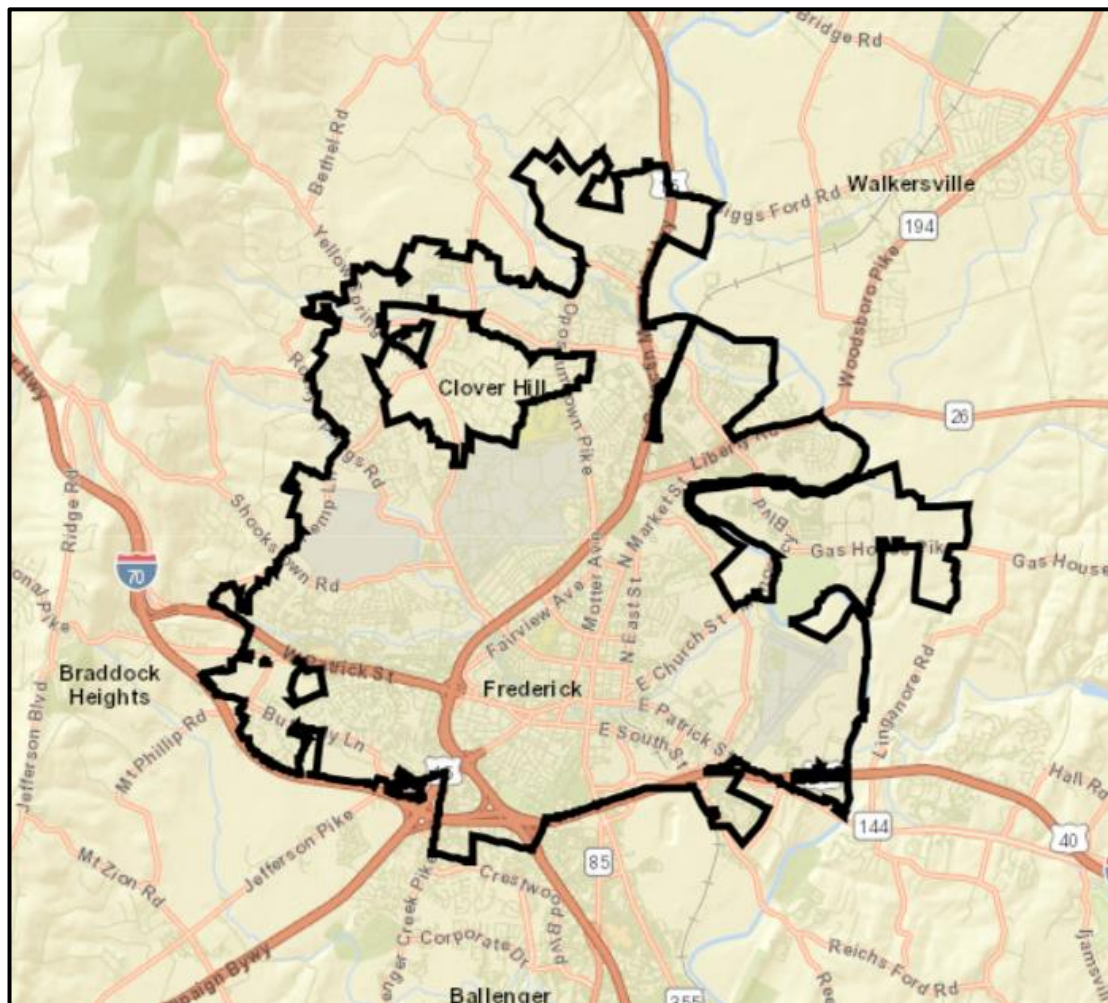




2. DEMOGRAPHIC & SOCIOECONOMIC ANALYSIS



CITY OF FREDERICK



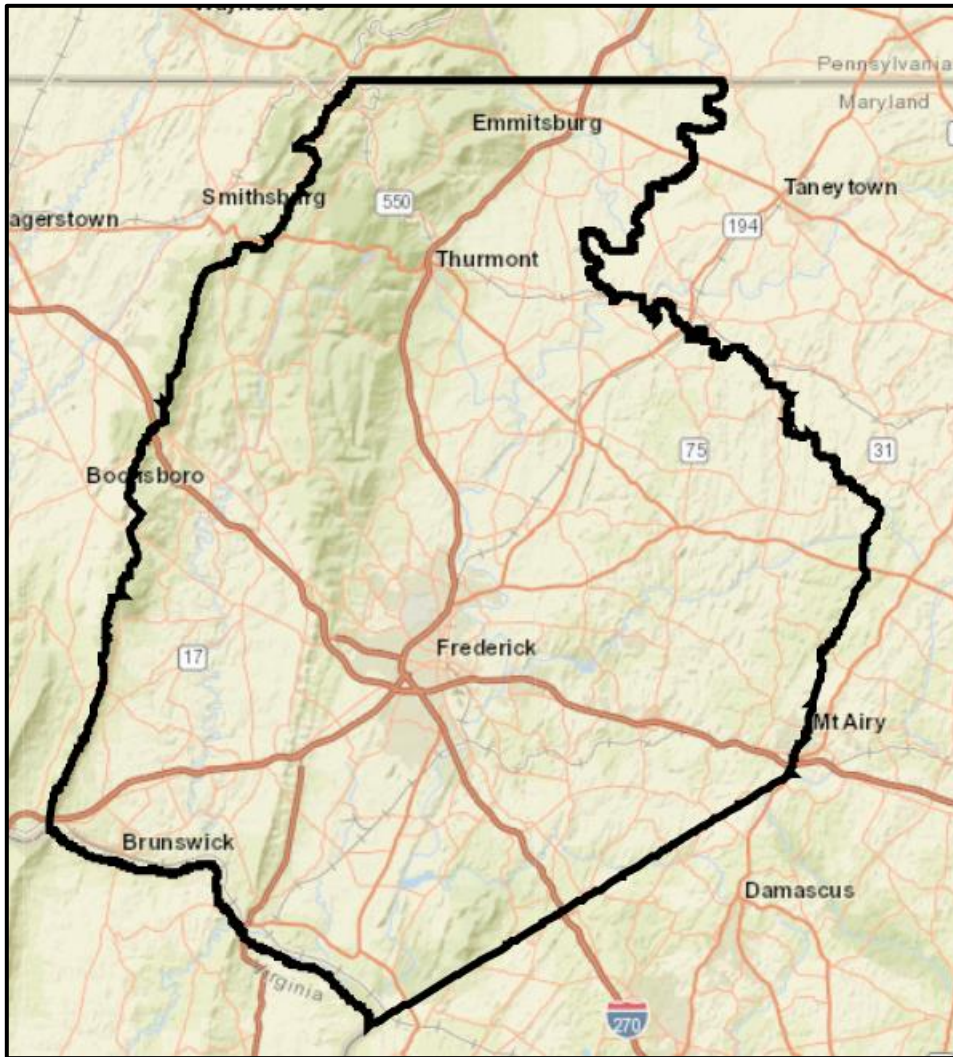
The City of Frederick is the county seat of Frederick County and has an estimated City population of 79,811.

Source: Esri

Note:  Denotes project site marker for the remainder of the report.



GREATER FREDERICK



Frederick County (or “Greater Frederick”) has an estimated population of 280,041.

Source: Esri



POPULATION DATA



	City of Frederick	Frederick County	United States
Population	79,811	280,041	335,707,897
Population Under 18	17,955	63,034	72,900,044
Percentage of Population Under 18	22.5%	22.5%	21.7%
Population Growth:			
Annual Pop. Growth (2000 to 2022)	1.6%	1.7%	0.8%
Annual Pop. Growth (5-year Projection)	1.0%	1.0%	0.2%
Projected Population (2027)	83,925	294,276	339,902,796
Median Age	37.5	40.1	38.9

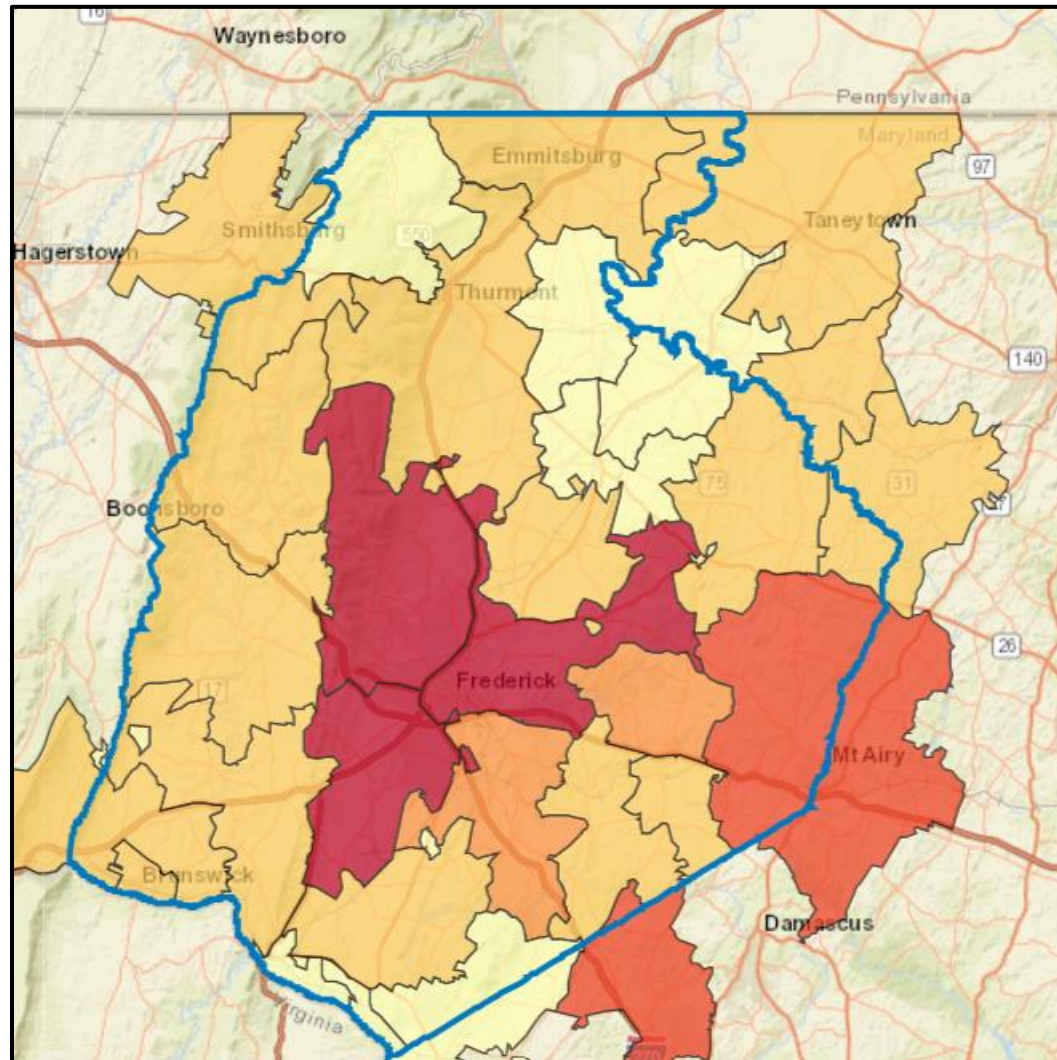
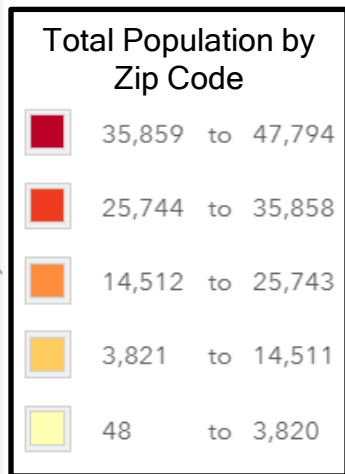
Source: Esri

Over the past 20 years, the population of the City of Frederick (or the “City”) has grown at 1.6% annually, which is a higher growth rate than the U.S. as a whole. The City’s projected growth rate is expected to continue to exceed that of the nation. Frederick County (or the “County”) is experiencing similarly rapid growth.

In terms of both population under 18 and median age, the City of Frederick is slightly younger than the U.S. average. A lower median age tends to represent a larger presence of working-age populations with young families, which can be a positive indicator for youth/amateur sports and community recreation demand.



POPULATION DISTRIBUTION

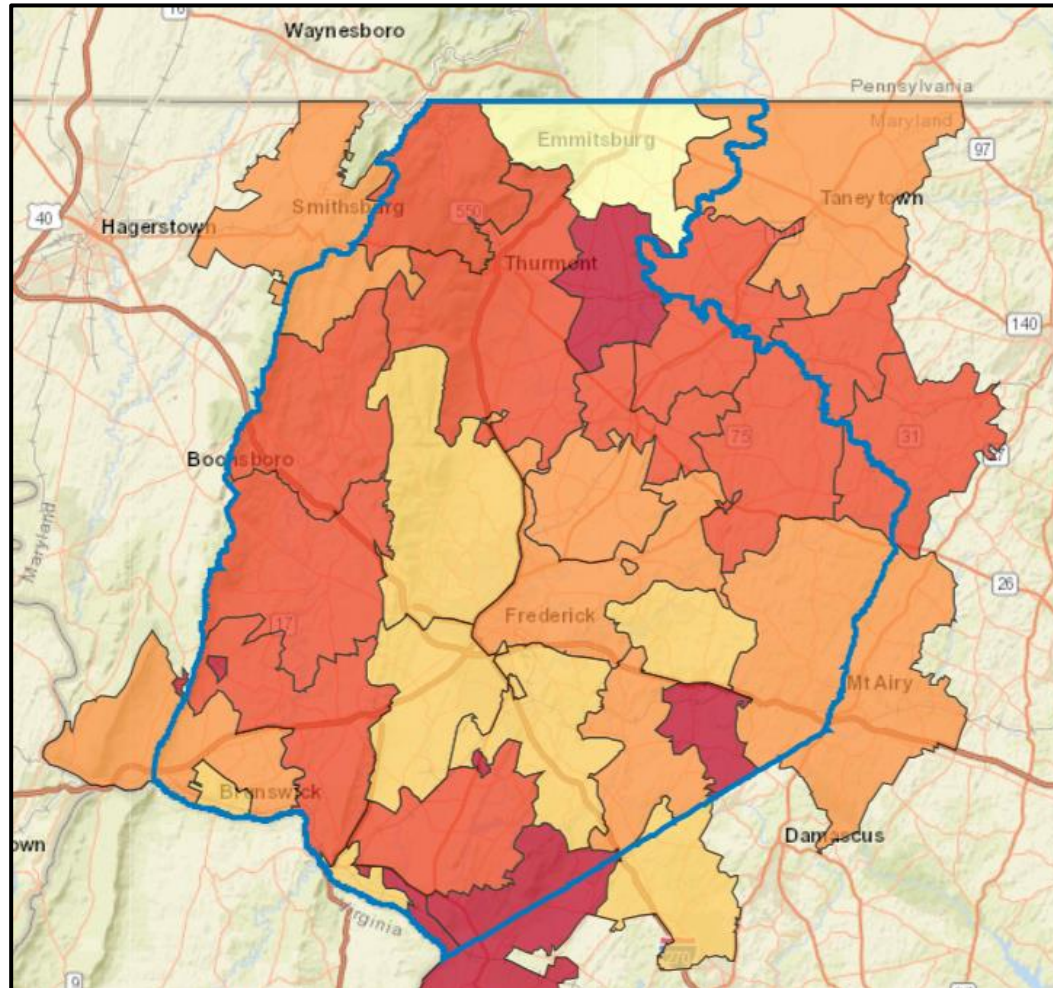
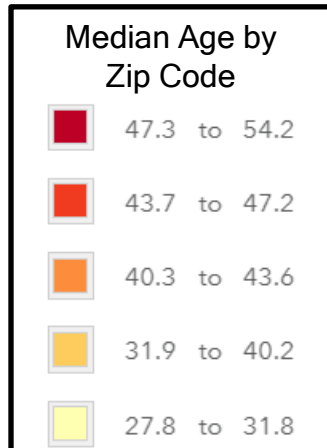


Population density within Frederick County is highest in and around the City of Frederick, as well as east/southeast along I-70 and I-270 towards Carroll County and Montgomery County.

Source: Esri



AGE DISTRIBUTION



Median age is lowest in and near the City of Frederick, as well as east/southeast towards Carroll County and Montgomery County.

Source: Esri



HOUSEHOLD DATA



	City of Frederick	Frederick County	United States
Total Households	30,718	101,491	128,657,669
Households With Children Under 18	17,990	71,240	83,407,414
Percentage of Households With Children	58.6%	70.2%	64.8%

Source: Esri

	City of Frederick	Frederick County	United States
Median Household Income	\$86,295	\$108,138	\$72,414
Adjusted Median Household Income (1)	\$79,097	\$95,108	

Sources: Esri, Sperling

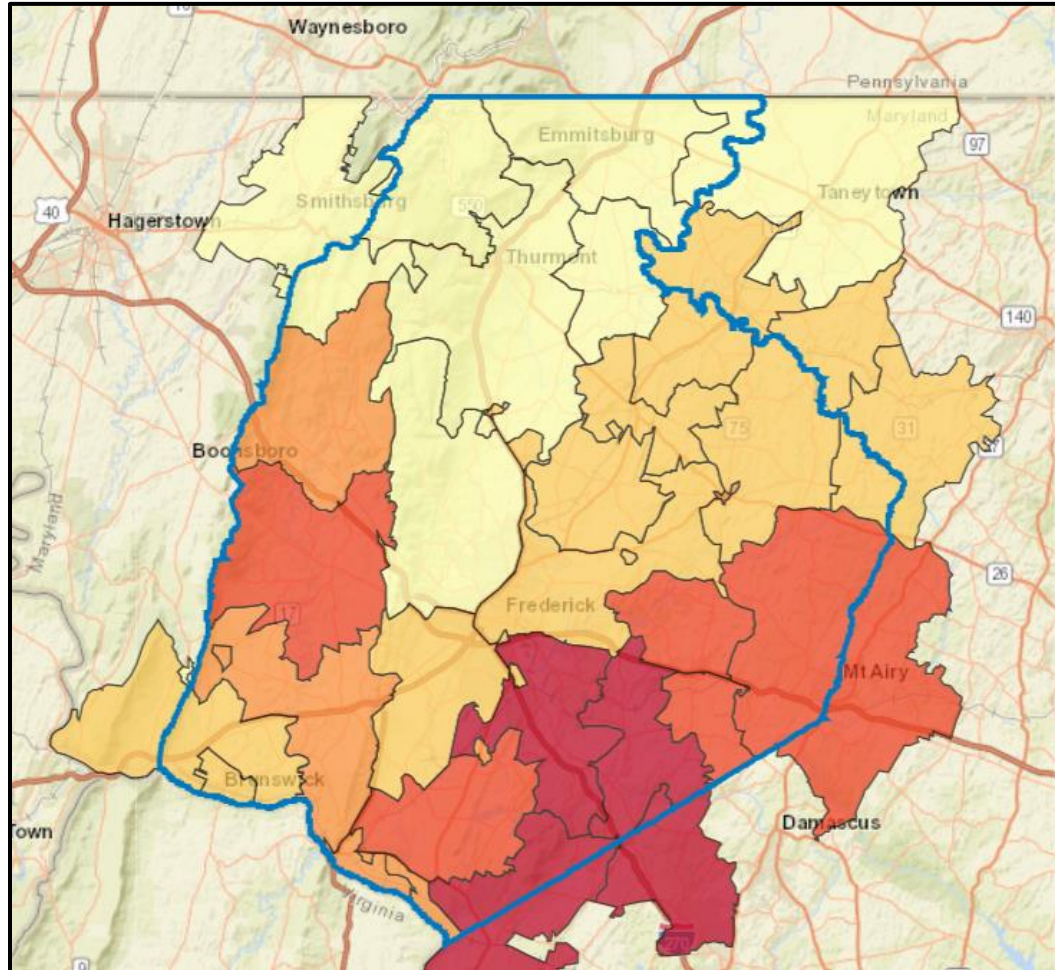
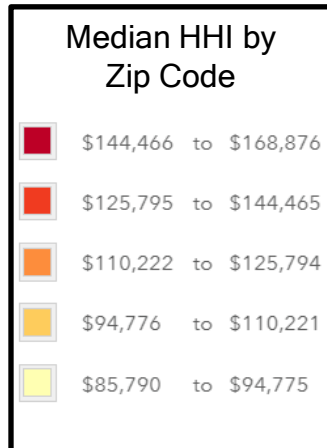
Note: (1) Adjusted for cost of living according to Sperling

Although the City of Frederick has a lower percentage of households with children than the U.S. average, Frederick County as a whole has a higher percentage than the national average. A high percentage of households with children can be a positive indicator for youth sports/recreation participation demand in the local area.

After accounting for the cost-of-living index (COLI), the COLI-adjusted median household income levels in both the City of Frederick and Frederick County are higher than the U.S. average, which indicates local residents may have more disposable income that can be spent on sports/recreation than would residents in other areas of the United States.



INCOME DISTRIBUTION

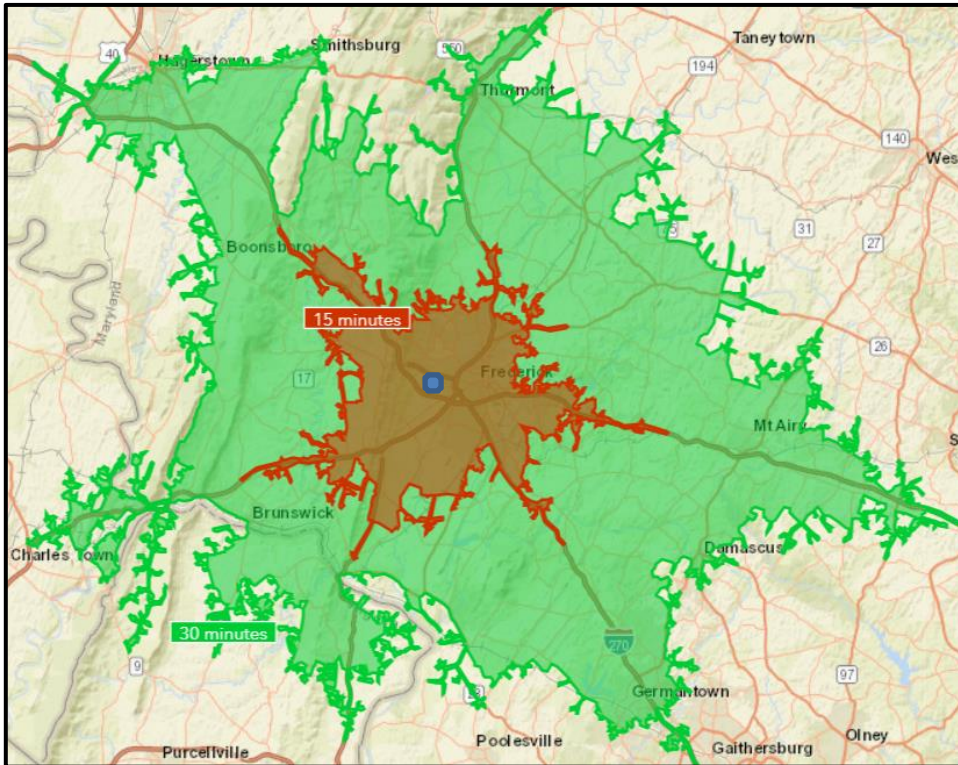


Median Household Income tends to be higher in the south/southeast regions of Frederick County, towards Carroll County and Montgomery County.

Source: Esri



WEEKDAY SPORTS USAGE DRIVE-TIME ZONES



Source: Esri

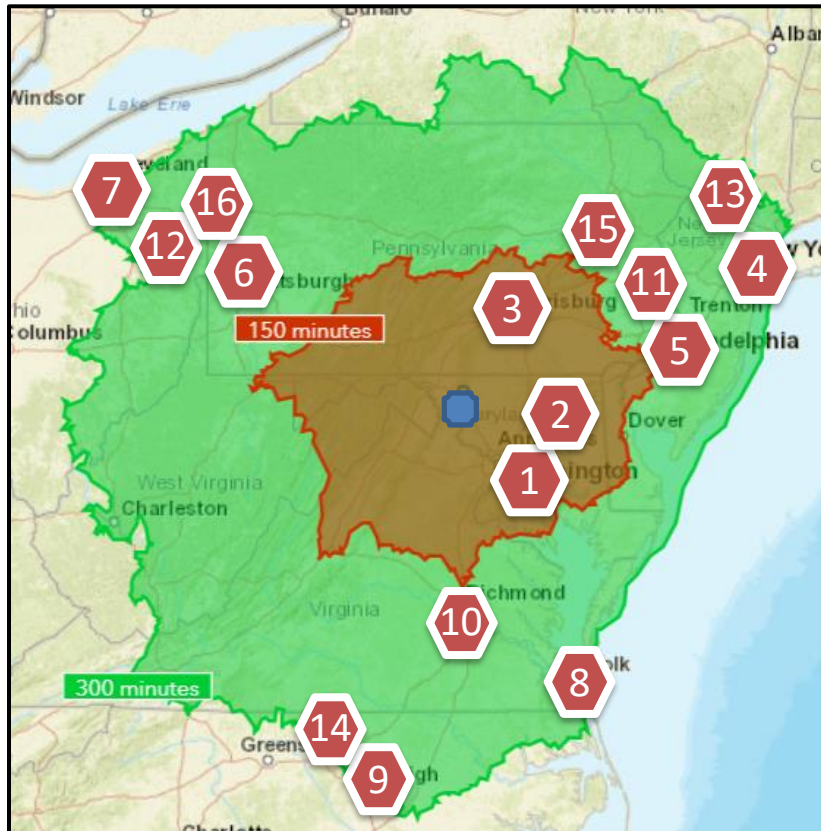
Based upon Victus Advisors' experience, primary weekday attendance for youth/amateur sports facilities (typically in the late afternoons and evenings) is usually drawn from within a 15-to-30-minute drive radius.

There is a population of nearly 141,000 people within a 15-minute drive of Westside Regional Park in Frederick, and nearly 460,000 people within a 30-minute drive.

Note: Regional, multi-day, weekend tournament attendance will typically be drawn from a much wider drive radius, as shown on the next page.



REGIONAL TOURNAMENT DRIVE-TIME ZONES



Source: Esri

There is a population of over 15.2 million people within a 2.5-hour drive time of Frederick, and over 55.3 million people within a 5-hour drive time of Frederick, to potentially draw from for sports tourism events.

Large MSAs (500K+ Pop) Within a 2-3 Hour Drive

- 1 Washington D.C. MSA
6,522,851
- 2 Baltimore MSA
2,861,168
- 3 Harrisburg MSA
598,396

Large MSA's (500K+ Pop) Within a 5-6 Hour Drive

- 4 New York MSA
20,224,976
- 5 Philadelphia MSA
6,290,595
- 6 Pittsburgh MSA
2,366,261
- 7 Cleveland MSA
2,083,095
- 8 Virginia Beach MSA
1,817,180
- 9 Raleigh MSA
1,489,947

Large MSA's (500K+ Pop) Within a 5-6 Hour Drive (Cont.)

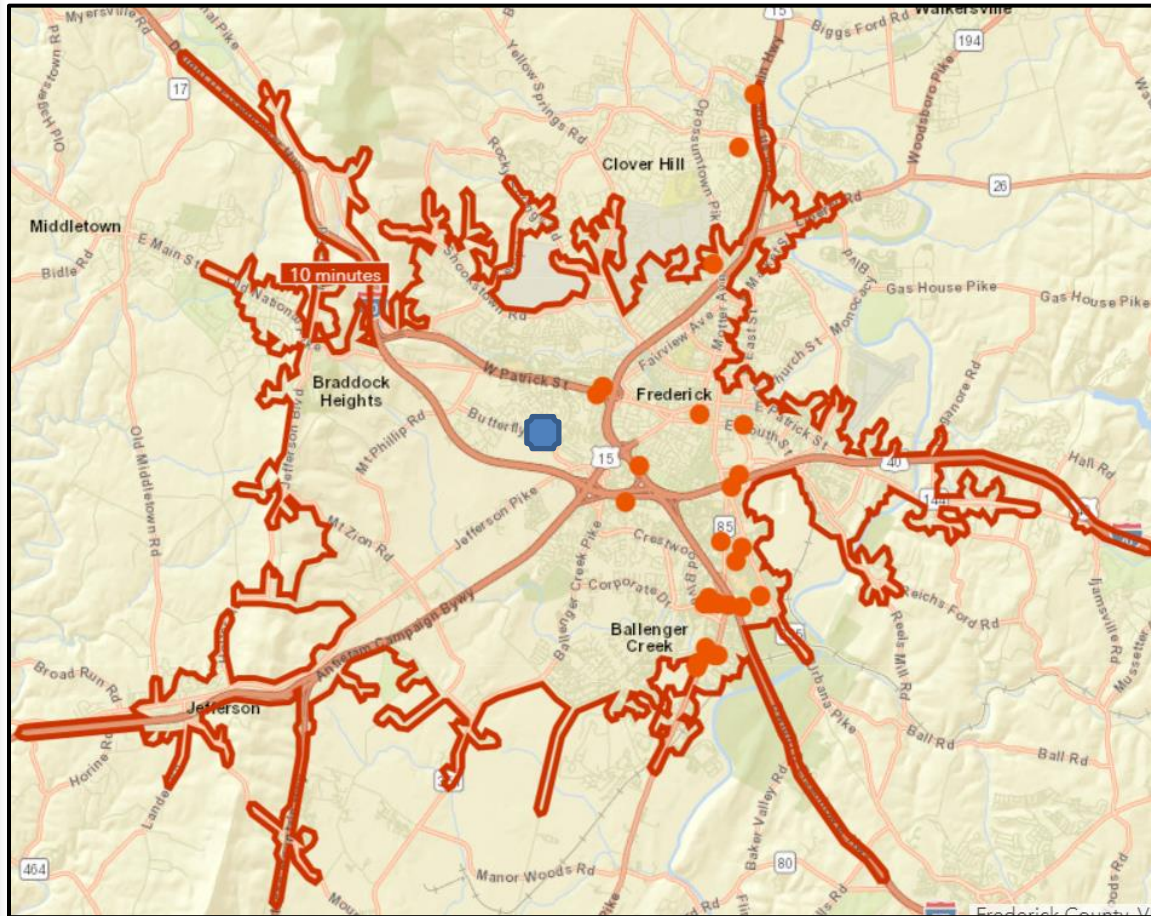
- 10 Richmond MSA
1,339,185
- 11 Allentown MSA
867,198
- 12 Akron MSA
699,833
- 13 Poughkeepsie MSA
696,269
- 14 Durham MSA
670,863
- 15 Scranton MSA
565,778
- 16 Youngstown MSA
534,551

METROPOLITAN STATISTICAL AREA (MSA)

MSA's are defined by U.S. Office of Management & Budget as adjacent counties with a high degree of social/economic integration with an urban core of 50,000 people or more.



HOTEL MAP



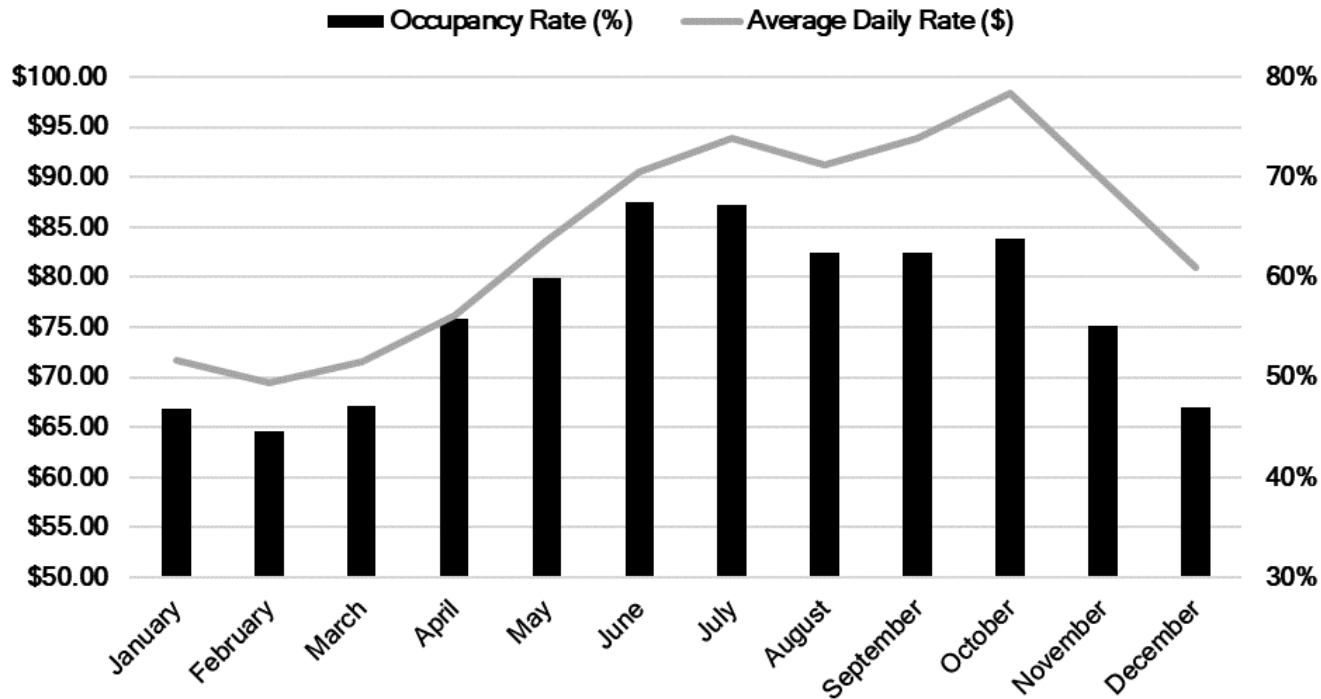
Source: Esri

Convenient, affordable, family-friendly lodging (preferably within a 10-minute drive area from a sports tourism venue) is an important component of attracting and hosting multi-day tournament activity.

Victus Advisors found over 15 lodging options (minimum 2-star hotel class) within a 10-minute drive of Westside Regional Park, including appealing family-oriented brands such as Hampton Inn & Suites and Fairfield Inn & Suites, among others.



2021 FREDERICK COUNTY HOTEL DATA



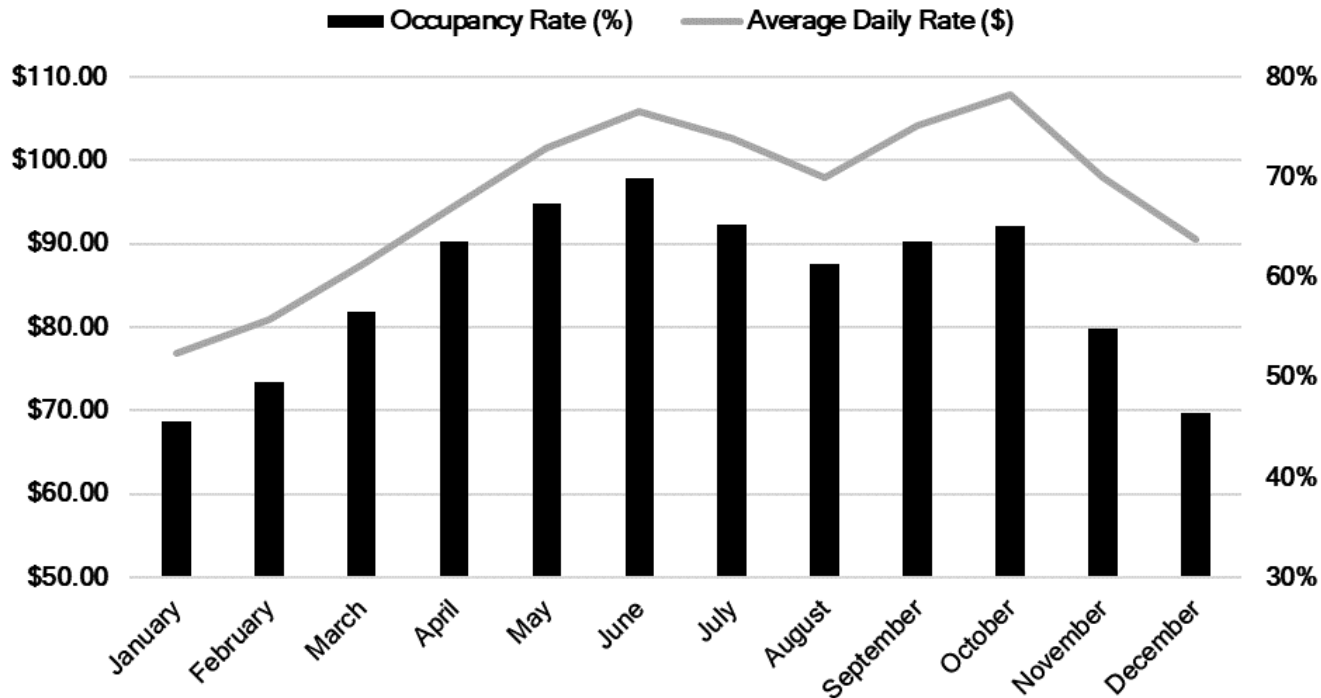
Source: Visit Frederick

In 2021, Frederick County hotel average daily rates (ADR) ranged from \$69 to \$99 per night across the calendar year, with occupancy rates ranging from approximately 45% to 68%.

Demand was highest (greater than 60% occupancy and \$80 ADR) in summer and fall, from June through October, whereas occupancy fell below 50% in December.



2022 FREDERICK COUNTY HOTEL DATA



Source: Visit Frederick

In 2022, Frederick County hotel average daily rates (ADR) increased from \$76 to \$108 per night throughout the calendar year, with occupancy rates ranging from approximately 46% to 70%.

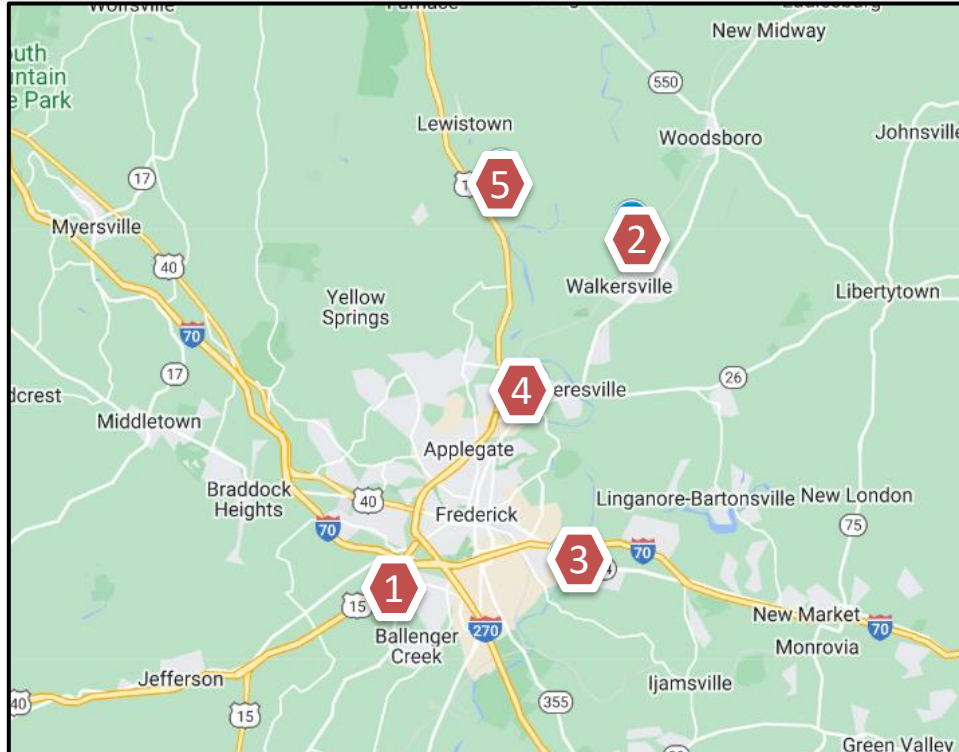
Demand peaked from April through October, whereas occupancy/ADR fell below 50% and \$70, respectively, in December.



3. LOCAL SPORTS FACILITY ANALYSIS



FREDERICK SPORTS TOURISM-CALIBER FACILITIES



Source: Google Maps

Note: Sorted by Facility in alphabetical order

Facility

- 1 Ballenger Creek Park
- 2 Heritage Farm Park
- 3 Pinecliff Park
- 4 Skate Frederick
- 5 Utica District Park

Victus Advisors identified a sample of sports tourism facilities located within Frederick County that meet the sports surface/amenity criteria to be defined as a “sports tourism-caliber” facility, based upon a minimum number of sports surfaces* (fields, courts, sheets, etc.) which are required to host regional and national sports tournaments.

**Criteria: Five (5) field minimum for baseball, softball, and multi-use fields; 2-sheet minimum for ice; and 50-meter minimum for pools. Any other sports facilities in the County were not included as they did not meet the requirement for being classified as a sports tourism-caliber facility.*



BALLENGER CREEK PARK



- Location: Frederick
- Owner: Frederick County
- Operator: Frederick County Parks & Recreation
- Features:
 - 5 baseball/softball fields (various sizes)
 - 6 multi-use, rectangular fields (various sizes)
 - Community building
 - Dog park
 - Playgrounds
- Sample Users:
 - i9Sports, FC Frederick, Clover Hill Baseball, Western Maryland Youth Lacrosse
- Sports Tourism:
 - The facility hosted 12 tournaments in the 2022-2023 fiscal year.



Frederick County
PARKS & RECREATION

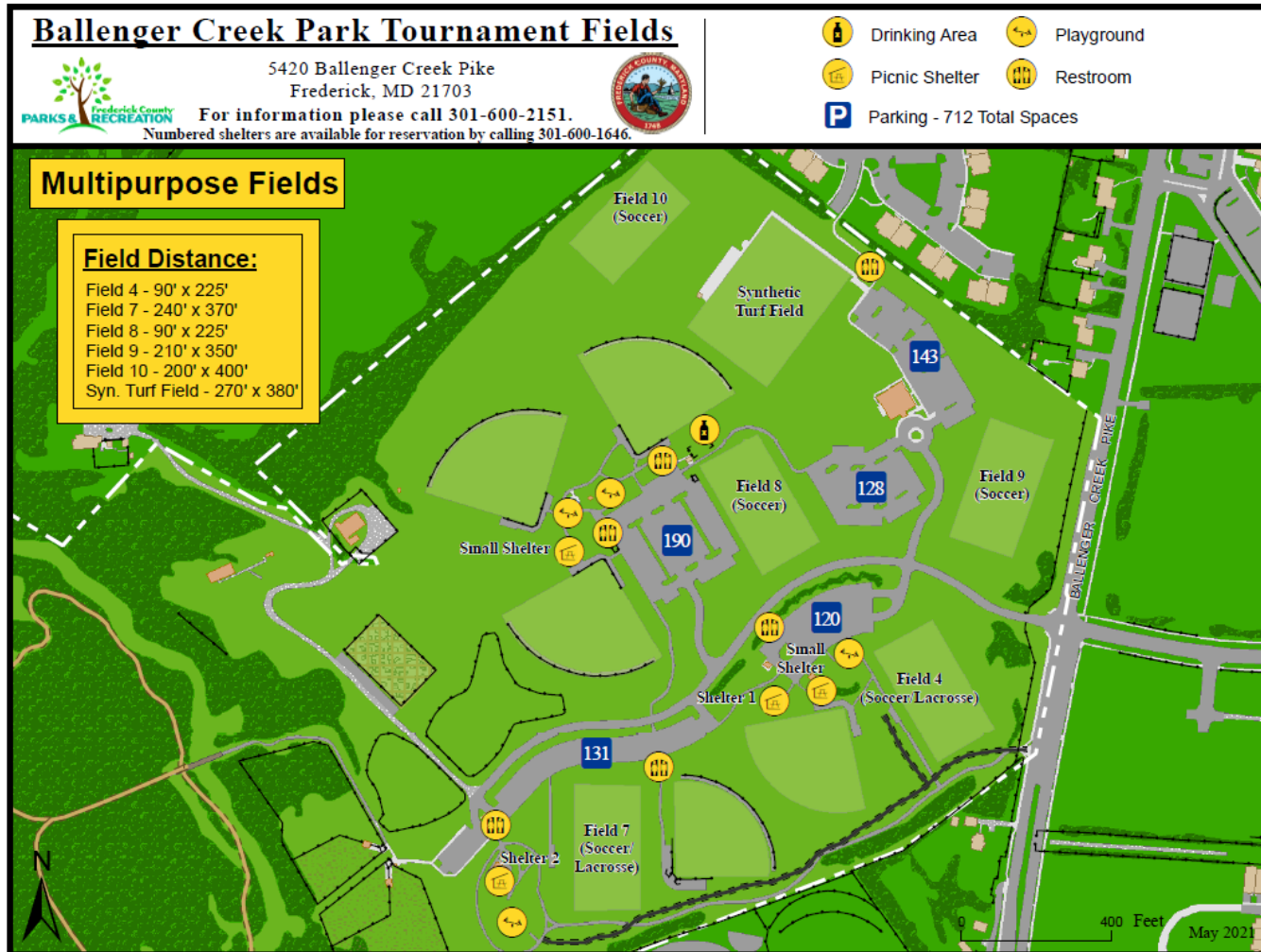


RENTAL RATES

- All Fields: \$45 per field per hour (in-county/non-profit); \$70 per field per hour (out-of-county/for-profit)

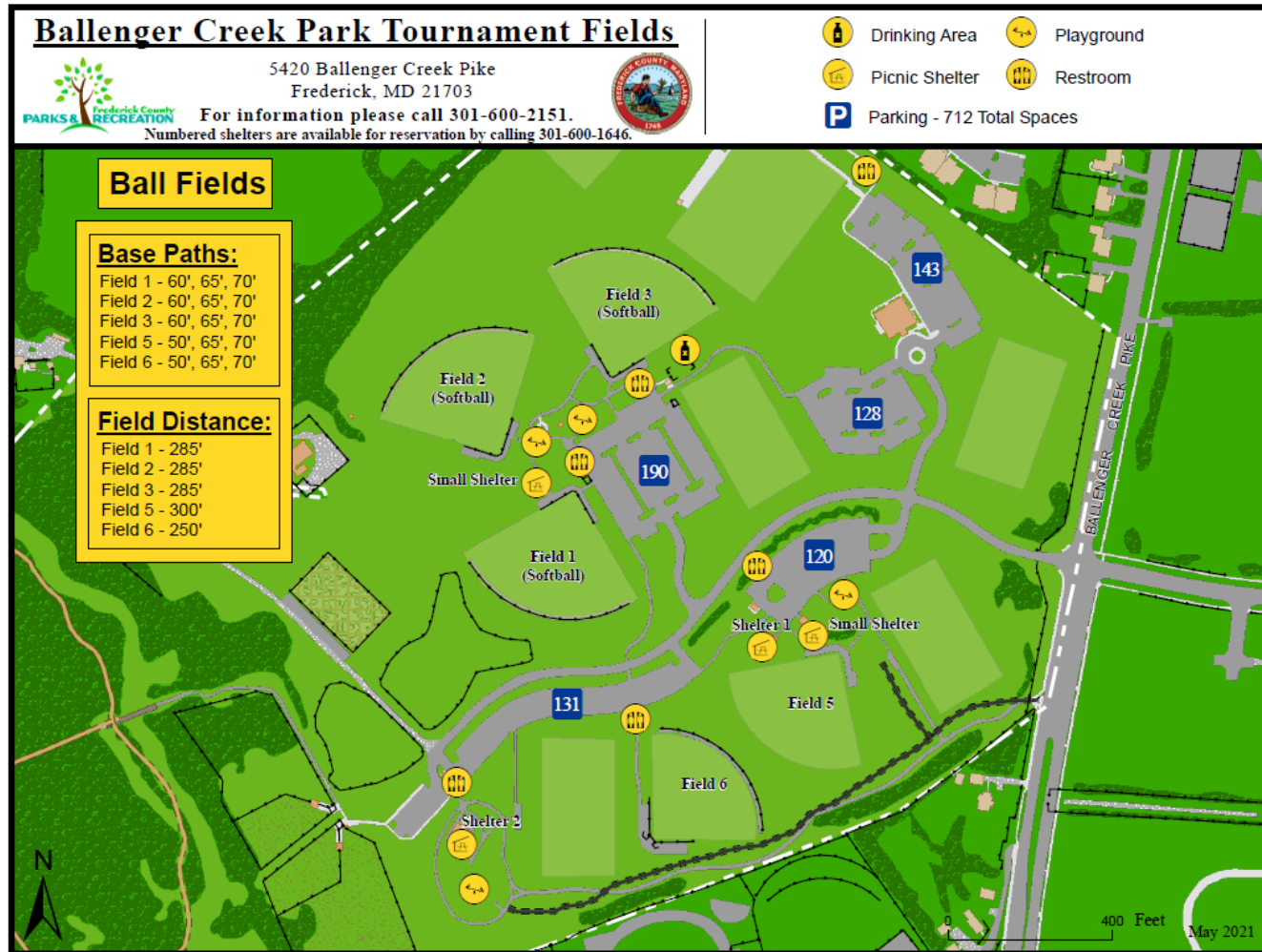


BALLENGER CREEK PARK (CONT.)





BALLENGER CREEK PARK (CONT.)





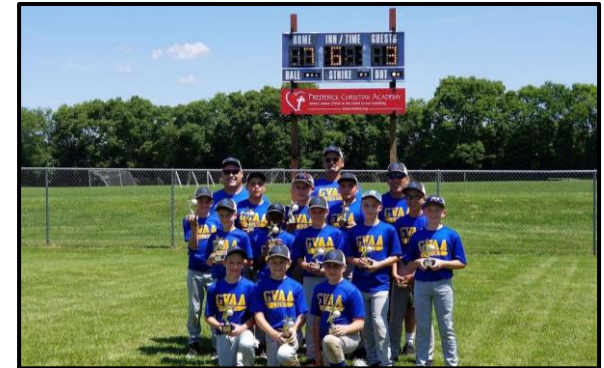
HERITAGE FARM PARK



- Location: Walkersville
- Owner/Operator: Town of Walkersville
- Features:
 - 8 baseball/softball fields (various sizes)
 - 4 multi-use, rectangular fields (various sizes)
 - 9-hole golf course
 - 18-hole disc golf course
 - Playgrounds
 - Trails
- Sample Users:
 - Glade Valley Athletic Association, Western Maryland Youth Lacrosse



TOWN OF
WALKERSVILLE
• MARYLAND •



RENTAL RATES

- Glade Valley Athletic Association does not pay rent to use the facility for their programs, but they do provide some financial contributions for electricity use and cleaning.
- The Town asks other groups that want to use the park to attend a Parks Commission meeting and present their plan for usage. At that point, the Parks Commission decides if the group can use the fields.



PINECLIFF PARK



- Location: Frederick
- Owner: Frederick County
- Operator: Frederick County Parks & Recreation
- Features:
 - 5 softball fields
 - Playgrounds
- Sample Users:
 - Frederick Social Sports, Frederick Area Softball Association
- Sports Tourism:
 - The facility hosted 6 tournaments in the 2022-2023 fiscal year.



Frederick County
PARKS & RECREATION



RENTAL RATES

- All Fields: \$45 per field per hour (in-county/non-profit); \$70 per field per hour (out-of-county/for-profit)



PINECLIFF PARK (CONT.)





SKATE FREDERICK



- Location: Frederick
- Owner/Operator: Private
- Features:
 - 2 NHL-sized ice sheets
 - Pro shop
- Sample Users:
 - Frederick Freeze
 - In-house leagues and tournaments
- Sports Tourism:
 - The facility also hosts occasional regional hockey tournaments



RENTAL RATES

- Frederick Freeze pays a \$400,000 annual lease to use the facility.



UTICA DISTRICT PARK



- Location: Frederick
- Owner: Frederick County
- Operator: Frederick County Parks & Recreation
- Features:
 - Frederick County's largest park, expanded in 2020
 - 8 multi-use, rectangular fields (various sizes)
 - 3 baseball/softball fields (various sizes)
 - Playgrounds
 - Trails
 - 5k running course
- Sample Users:
 - Team Maryland Lacrosse, Frederick Skyline C.F.
- Sports Tourism:
 - The facility hosted 12 tournaments in the 2022-2023 fiscal year.



RENTAL RATES

- Grass Fields: \$45 per field per hour (in-county/non-profit); \$70 per field per hour (out-of-county/for-profit)
- Turf Fields: \$60 (youth) or \$80 (adult) per field per hour (in-county/non-profit); \$120 per field per hour (out-of-county/for-profit)



UTICA DISTRICT PARK (CONT.)





FREDERICK INDOOR SPORTS FACILITY INVENTORY



Facility	City	Owner	Operator	Multi-Use Courts	Indoor Pool	Ice Sheet
Catoctin Recreation Center	Thurmont	Public	Public	1	-	-
Centerville Recreation Center	Frederick	Public	Public	1	-	-
Deer Crossing Recreation Center	New Market	Public	Public	1	-	-
Downtown Y	Frederick	Private	Private	1	1	-
Fort Detrick MWR	Frederick	Private	Private	-	1	-
Frederick Community College Field House	Frederick	Public	Public	1	-	-
Huntsinger Aquatics Center	Frederick	Private	Private	-	1	-
Middletown High School	Middletown	Public	Public	1	1	-
Middletown Recreation Center	Middletown	Public	Public	1	-	-
Natelli Family YMCA	Ijamsville	Private	Private	1	1	-
Oakdale Recreation Center	Ijamsville	Public	Public	1	-	-
Onelife Fitness	Frederick	Private	Private	-	1	-
Rock Creek Recreation Center	Walkersville	Public	Public	1	-	-
Skate Frederick	Frederick	Private	Private	-	-	2
Sugarloaf Recreation Center	Frederick	Public	Public	1	-	-
Thomas Johnson Middle School Recreation Center	Frederick	Public	Public	1	-	-
Thurmont Recreation Center	Thurmont	Public	Public	1	-	-
Tuscarora Recreation Center	Frederick	Public	Public	1	-	-
Walkersville High School	Walkersville	Public	Public	1	1	-
Walkersville Recreation Center	Walkersville	Public	Public	1	-	-
William R. Talley Recreation Center	Frederick	Public	Public	1	-	-
Y Sports Warehouse	Frederick	Private	Private	1	-	-
AVERAGE				1.0	1.0	2.0
HIGH				1	1	2
LOW				1	1	2

Source: Victus research

Note: The courts and pools listed are of various sizes

As shown above, there is no indoor sports facility with more than one (1) multi-use court in Frederick County. Additionally, although there are seven (7) pools, none of them are 50-meter competitive pools. There is no 200-meter indoor track in the County.



FREDERICK BALL FIELDS FACILITY INVENTORY



Facility	City/Town	Owner	Operator	Baseball Fields	Softball Fields	Facility	City/Town	Owner	Operator	Baseball Fields	Softball Fields
Angelberger Field	Frederick	Public	Public	2	-	Libertytown Park	Libertytown	Public	Public	2	-
Araby Park	Frederick	Public	Public	-	2	Little Loats Field	Frederick	Public	Public	1	-
Baker Park	Frederick	Public	Public	1	-	Loats Park	Frederick	Public	Public	1	-
Ballenger Creek Park	Frederick	Public	Public	5	-	LOUYAA Park	New Market	Public	Public	2	2
Braddock Heights Park	Frederick	Public	Public	1	-	Marvin E. Younkins Memorial Field	Brunswick	Public	Public	1	-
Brunswick Elementary School	Brunswick	Public	Public	2	-	Max Kehne Park	Frederick	Public	Public	1	1
Brunswick High School	Brunswick	Public	Public	1	1	McCurdy Field	Frederick	Public	Public	1	1
Camp Shoresh	Adamstown	Public	Public	-	1	Middletown Community Park	Middletown	Public	Public	3	2
Caroll Manor Elementary School	Adamstown	Public	Public	2	-	Monarch Ridge Park	Frederick	Public	Public	1	-
Carrollton Park	Frederick	Public	Public	1	-	Mount Airy Carnival Grounds	Mt. Airy	Public	Public	-	4
Clerestory Park	Frederick	Public	Public	1	-	New Market Middle School	New Market	Public	Public	1	1
Clover Ridge Park	Frederick	Public	Public	1	-	Old Camp Park	Frederick	Public	Public	1	-
Doub's Meadow Park	Myersville	Public	Public	2	1	Old National Pike District Park	Mt. Airy	Public	Public	-	1
East/West Park	Mt. Airy	Public	Public	1	-	Othello Park	Knoxville	Public	Public	2	1
Emmitsburg Memorial Park	Emmitsburg	Public	Public	3	1	Our Lady of the Meadows	Emmitsburg	Private	Private	-	1
Emory & Elizabeth Frye Memorial Field	Brunswick	Public	Public	1	-	Pinecliff Park	Frederick	Public	Public	-	5
Faith Baptist Church	Knoxville	Public	Public	1	-	Rensberg Park	Middletown	Public	Public	3	1
Fireman's Field	Adamstown	Public	Public	1	-	Riverwalk Park	Frederick	Public	Public	1	-
Frederick Community College Baseball Field	Frederick	Public	Public	1	-	Robin Meadows	Frederick	Public	Public	1	-
Golfview Park	Frederick	Public	Public	-	1	Russell Windsor Field	Mt. Airy	Public	Public	1	-
Grove Park	Frederick	Public	Public	1	-	Staley Park	Frederick	Public	Public	1	-
Harmon Park	Frederick	Public	Public	1	-	Staley Stadium	Frederick	Public	Public	1	-
Harp Field	Myersville	Public	Public	1	-	Thurmont Little League Fields	Thurmont	Public	Public	2	4
Harry T. Greager Memorial Athletic Field	Frederick	Public	Public	-	1	Urbana Community Park	Frederick	Public	Public	3	-
Heritage Farm Park	Walkersville	Public	Public	3	5	Urbana District Park	Frederick	Public	Public	2	1
Hillcrest Park	Frederick	Public	Public	1	-	Utica District Park	Frederick	Public	Public	2	1
James W. Main Park	Brunswick	Public	Public	1	-	Walnut Ridge Park	Frederick	Public	Public	-	1
Jefferson Field	Jefferson	Public	Public	1	-	Whittier Community Baseball Park	Frederick	Public	Public	2	-
Kemptown Park	Monrovia	Public	Public	2	-	Wolfsville Ruritan Park	Myersville	Public	Public	-	1
Lake Coventry Park	Frederick	Public	Public	1	-	Woodsboro Park	Woodsboro	Public	Public	-	3
Lewistown Park	Lewistown	Public	Public	1	1	Yellow Springs Elementary School	Frederick	Public	Public	1	2
<i>Source: Victus research</i>				AVERAGE				1.5			
<i>Note: The ball fields listed are of various sizes</i>				HIGH				5			
				LOW				1			

As shown above, there are numerous ball fields found throughout Frederick County. It should be noted however, that there is only one (1) baseball complex with at least five (5) fields, and two (2) softball field complexes with at least five (5) fields).



FREDERICK RECTANGULAR FIELDS FACILITY INVENTORY



Facility	City/Town	Owner	Operator	Multi-Use Fields	Facility	City/Town	Owner	Operator	Multi-Use Fields
Baker Park	Frederick	Public	Public	1	Middletown Community Park	Middletown	Public	Public	2
Ballenger Creek Park	Frederick	Public	Public	6	Middletown High School Stadium	Middletown	Public	Public	1
Brunswick Sports Complex	Brunswick	Public	Public	1	Mt. Airy Elementary School	Mt. Airy	Public	Public	1
Clerestory Park	Frederick	Public	Public	1	Mt. Airy Middle School	Mt. Airy	Public	Public	1
Clover Hill Park	Frederick	Public	Public	1	New Market Middle School	New Market	Public	Public	1
Crestwood Middle School	Frederick	Public	Public	1	North Crossing Park	Frederick	Public	Public	1
Emerald Farms Park	Frederick	Public	Public	1	Oakdale High School	Ijamsville	Public	Public	1
Eyler Road Park	Frederick	Public	Public	3	Old National Pike Park	Mt. Airy	Public	Public	4
Fountaindale Park	Middletown	Public	Public	1	Othello Park	Knoxville	Public	Public	3
Frederick High School Fields	Frederick	Public	Public	1	Remsburg Park	Middletown	Public	Public	5
Golfview Park	Frederick	Public	Public	1	River's Edge Farm Soccer Fields	Frederick	Public	Public	2
Gov. Thomas Johnson Middle School	Frederick	Public	Public	1	Riverside Park	Frederick	Public	Public	1
Green Hill Park	Adamstown	Public	Public	1	St. John's School Field	Frederick	Private	Private	1
Greenleaf Park	Frederick	Public	Public	1	Toca Juniors Soccer Complex	Ijamsville	Private	Private	4
Grove Park	Frederick	Public	Public	1	Tuscarora Elementary	Frederick	Public	Public	1
Heritage Farm Park	Walkersville	Public	Public	4	Tuscarora High School	Frederick	Public	Public	1
Hill Street Park	Frederick	Public	Public	2	Tuscarora Recreation Center	Frederick	Public	Public	2
Hillcrest Elementary School	Frederick	Public	Public	1	Urbana Community Park	Frederick	Public	Public	1
Hood College	Frederick	Private	Private	1	Urbana District Park	Frederick	Public	Public	3
Hospital Park	Frederick	Public	Public	1	Urbana High School Fields	Frederick	Public	Public	3
Libertytown Park	Libertytown	Public	Public	1	Utica District Park	Frederick	Public	Public	8
LOUYAA Park	New Market	Public	Public	4	Wiles Branch Park	Middletown	Public	Public	1
Lucas Village Park	Frederick	Public	Public	1	AVERAGE				1.9
McCurdy Field	Frederick	Public	Public	1	HIGH				8
					LOW				1

Source: Victus research

Note: The multi-use fields listed are of various sizes

As shown above, there are numerous multi-use rectangular fields found throughout Frederick County, however there are just three (3) facilities with 5+ fields, and Utica District Park has the largest number of fields at eight (8).



FREDERICK RACQUET SPORTS FACILITY INVENTORY



Facility	City/Town	Owner	Operator	Tennis Courts	Pickleball Courts
Amber Meadows Park	Frederick	Public	Public	2	-
Baker Park	Frederick	Public	Public	6	-
Commons of Avalon Park	Frederick	Public	Public	1	-
Kemptown Park	Monrovia	Public	Public	2	-
Libertytown Park	Libertytown	Public	Public	3	-
Max Kehne Park	Frederick	Public	Public	2	-
Middletown Community Park	Middletown	Public	Public	4	-
Monarch Ridge Park	Frederick	Public	Public	1	-
Monocacy Village Park	Frederick	Public	Public	1	6
Overlook Park	Frederick	Public	Public	2	-
Trinity Recreation Center	Frederick	Public	Public	-	3
Urbana Community Park	Frederick	Public	Public	3	-
Utica District Park	Frederick	Public	Public	1	-
William R. Talley Recreation Center	Frederick	Public	Public	-	4
Wetherburne Park	Frederick	Public	Public	2	-
Y Sports Warehouse	Frederick	Private	Private	-	4
AVERAGE				2.3	4.3
HIGH				6	6
LOW				1	3

Source: Victus research

Note: Some tennis courts are also used for pickleball

As shown above, there are numerous tennis courts throughout Frederick County, but only four (4) facilities have pickleball courts.



FACILITY PROFILE SUMMARY



Ball Fields: There are numerous ball fields found throughout Frederick County. It should be noted however, that there is only one (1) baseball complex with at least five (5) fields, and two (2) softball field complexes with at least five (5) fields.

Competitive Pool: There is no indoor 50-meter competitive pool in the County.

Indoor Court Space: There is no indoor sports facility with more than one (1) multi-use court.

Rectangular Fields: There are numerous multi-use rectangular fields found throughout Frederick County, however just three (3) have 5+ fields, with eight (8) fields being the largest.

Racquet Sports Courts: There are numerous tennis courts throughout Frederick County, but only four (4) facilities have pickleball courts.



4. COMPARABLE REGIONAL SPORTS FACILITY ANALYSIS



REGIONAL SPORTS FACILITY OVERVIEW



This section is intended to profile comparable regional facilities that may be relevant for benchmarking the potential building program, operations, and impacts of the proposed Maryland Sports & Learning Campus. This section is divided into three sub-sections, as follows:

- **Indoor Sports Complexes:** These are sports tourism facilities that have multi-use indoor court space for basketball and volleyball but can also feature amenities such as an indoor track or indoor pools in the same facility.
- **Outdoor Sports Complexes:** These are sports tourism facilities that feature multiple multi-use fields for sports such as soccer, lacrosse, baseball, softball, etc.
- **Indoor Ice Facilities:** These are sports tourism facilities that feature at least two (2) ice sheets.
- **Indoor Aquatic Facilities:** These are sports tourism facilities that feature indoor, 50-meter competition pools.



4. COMPARABLE REGIONAL SPORTS FACILITY ANALYSIS A. INDOOR SPORTS COMPLEXES



REGIONAL INDOOR SPORTS COMPLEXES



Victus Advisors analyzed regional indoor sports complexes within a 6-hour drive of Frederick that could potentially be a competitive facility for existing or future sports tourism facilities in Frederick. Our criteria was venues with a minimum of six (6) basketball courts, convertible to at least six (6) or more volleyball courts.

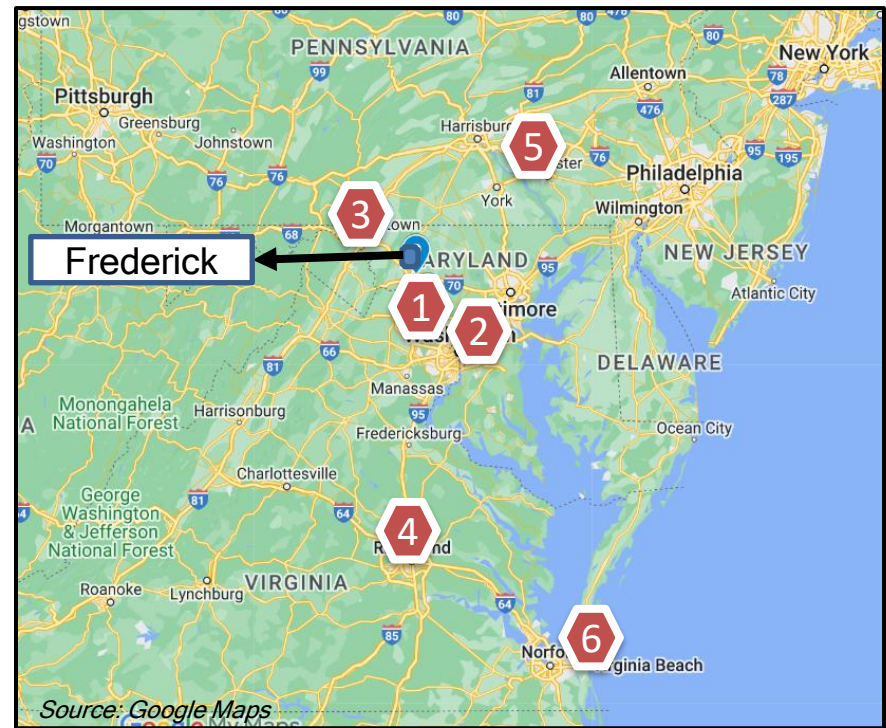
Facility

- 1 Adventist Healthcare Fieldhouse
- 2 Athletic Republic Capital Region
- 3 Hagerstown Field House
- 4 Henrico Sports & Events Center
- 5 Spooky Nook
- 6 Virginia Beach Sports Center

Notes: (1) Sorted in alphabetical order

(2) Hagerstown Field House is currently in the construction bidding process and is expected to open in January 2025.

(3) This is not intended to be a comprehensive inventory, rather we have profiled the regional facilities that were most often referenced by local stakeholders and regional user groups.





ADVENTIST HEALTHCARE FIELDHOUSE



Boyd's, MD

- Opened: 2000
- Construction Cost: \$32.1M in 2023 dollars (including Soccerplex)
- Owner/Operator: Maryland Soccer Foundation
- Footprint: 48,000 sq. ft.
- Features:
 - 8 basketball/volleyball courts (March to November)
 - Convertible to 2 indoor turf fields (November to March)
 - Café
- Programming:
 - Adult and youth leagues for indoor soccer, basketball, and volleyball.
- Economic Impact:
 - A George Washington University study conducted in 2013 estimated that the 12 major tournaments held at the facility (including the Soccerplex) generated more than \$25 million in direct visitor spending and \$1.2 million in tax revenue locally.



MARYLAND
SoccerPlex & Adventist HealthCare Fieldhouse



RENTAL RATES

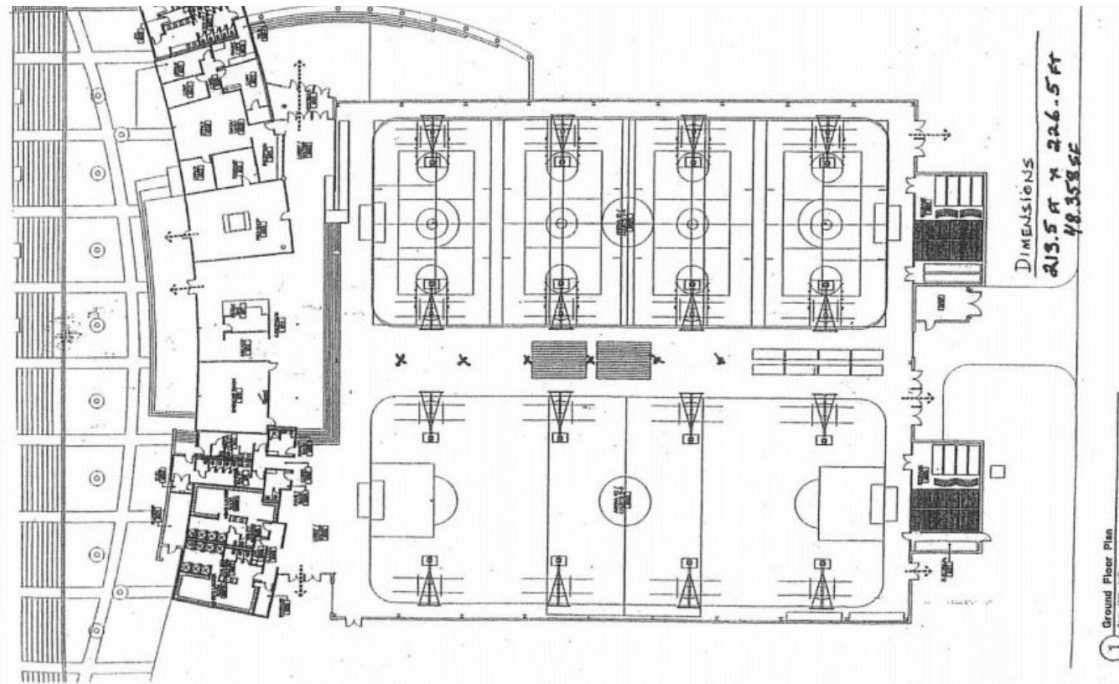
- Basketball/Volleyball: \$60 per court per hour
 - Indoor Turf (Full Field): \$195 to \$245 per field per hour depending on day and time of day
 - Indoor Turf (Half Field): \$97.50 to \$122.50 per field per hour depending on day and time of day



ADVENTIST HEALTHCARE FIELDHOUSE (CONT.)



Floor Plan





ATHLETIC REPUBLIC CAPITOL REGION



District Heights, MD

- Opened: 2021
- Construction Cost: Undisclosed
- Owner/Operator: Private franchisees of Athletic Republic
- Footprint: 100,000 sq. ft. of playable space
- Features:
 - 8 basketball courts
 - Workout area
 - 700 meters of track space
 - 2 turf fields
 - 2 studio rooms
 - Café
- Programming:
 - The facility is marketed for training, leagues, and tournaments.



RENTAL RATES

- Basketball Court: \$100 per hour per court



HAGERSTOWN FIELD HOUSE



Hagerstown, MD

- Planned Opening: January 2025
- Projected Construction Cost: \$24.6M in 2023 dollars*
- Owner: City of Hagerstown
- Operator: Eastern Sports Management
- Footprint: 114,000 sq. ft.
- Features:
 - 6 basketball courts convertible to 8 volleyball courts
 - 2 indoor turf fields
 - Fitness area
 - Restaurant
- Programming:
 - The City of Hagerstown anticipates to make a construction contract award by October 2023.
 - The facility will host basketball, volleyball, other sports events.
 - The City of Hagerstown is planning to issue a bond to help fund the facility, which will be paid for by a user agreement with Eastern Sports Management. The rest of the funding will come from state sources.
 - The facility is estimated to attract about 27,000 out-of-town visitors annually generating over \$1.4 million in economic impact.





HAGERSTOWN FIELD HOUSE (CONT.)



Floor Plan





HENRICO SPORTS & EVENTS CENTER



Glen Allen, VA

- Opening: Fall 2023
- Construction Cost: \$50M in 2023 dollars*
- Owner: Henrico County
- Operator: Henrico Sports & Entertainment Authority
- Footprint: 185,000 sq. ft.
- Features:
 - 12 basketball courts convertible to 24 volleyball courts
 - 4 meeting rooms
 - 6 locker rooms
 - 39,000-sq.ft. flat floor event space with portable seating large enough to accommodate 3,500 spectators or staging and seating for up to 4,500 for meetings and events.
- Programming:
 - The facility will host basketball, volleyball, pickleball, wrestling, gymnastics, dance, robotics, e-sports, and other sports and non-sports events.
 - Local leaders said that the facility would be capable of hosting multiple events at a time, and that they also would be looking to host high school graduations.
 - In a feasibility study conducted in 2020, Victus Advisors estimated that the facility could host up to 30 annual sports tournaments, as well as up to 20 annual community/civic events (graduations, etc.). Victus also projected that the facility could generate incremental annual impacts of more than \$35 million in visitor direct spending and over 67,000 hotel nights.



HENRICO SPORTS & EVENTS CENTER (CONT.)



Sports Configuration



Graduation Configuration



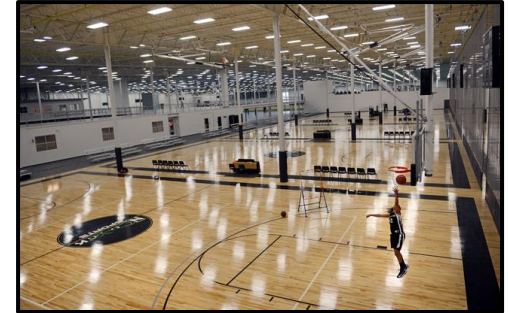


SPOOKY NOOK



Manheim, PA

- Opened: 2013
- Construction Cost: \$55.3M in 2023 dollars*
- Owner/Operator: Private
- Footprint: 700,000 sq. ft.
- Features:
 - Largest sports complex in North America (700,000 sq. ft. indoor) plus outdoor field hockey/climate-controlled fieldhouse dome
 - 10 full-sized basketball convertible to 10 volleyball courts
 - Rock Gym
 - Clip N' Climb Area
 - 3, 60' x 120' enclosed turf fields, plus two 120' x 200' turf fields in the field house
 - Baseball & Softball Training Center
 - Sports Performance
 - Fitness Center
- Programming:
 - Tournaments for basketball, volleyball, soccer, lacrosse, field hockey, etc.

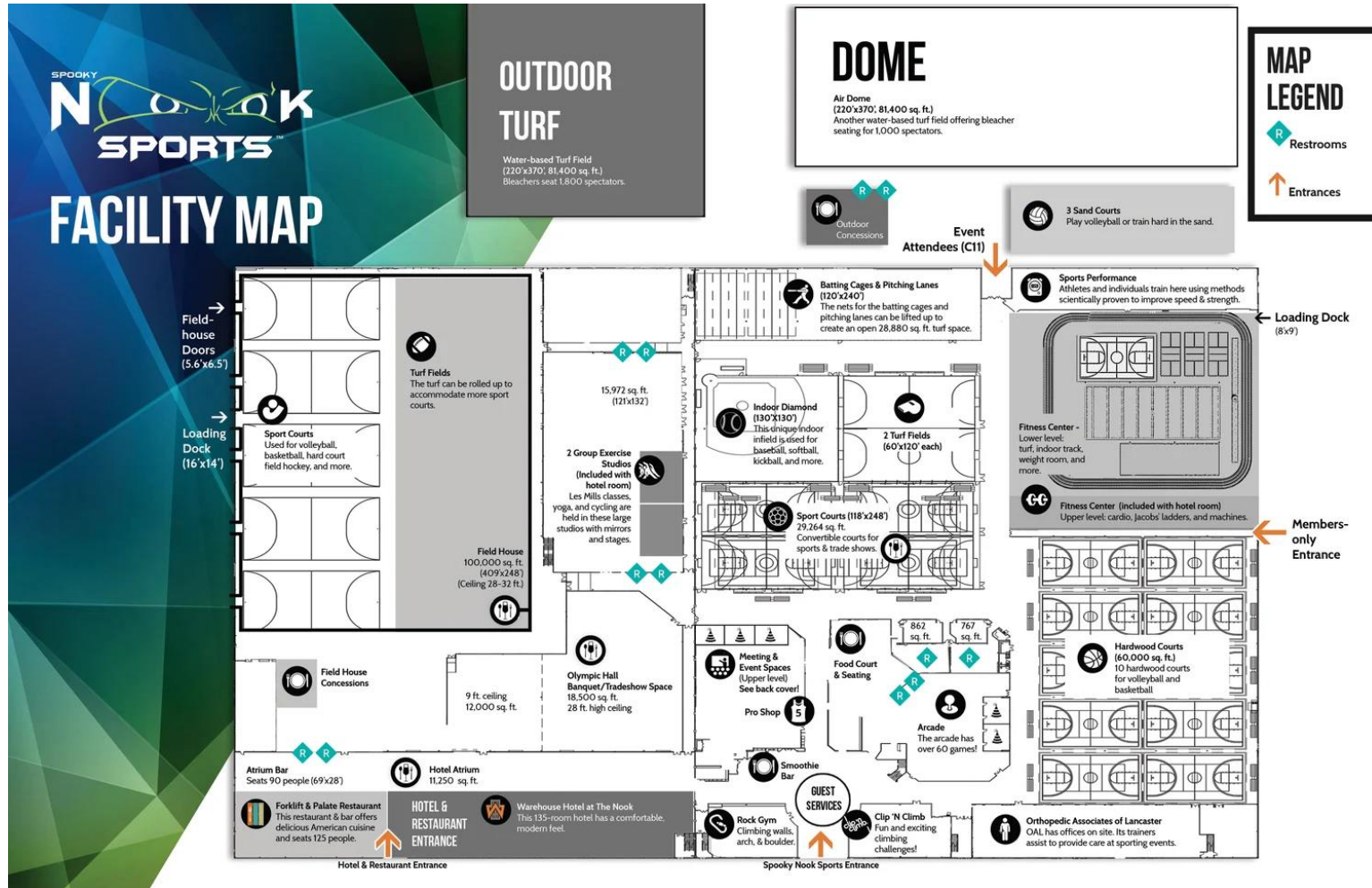




SPOOKY NOOK



Floor Plan





VIRGINIA BEACH SPORTS CENTER



Virginia Beach, VA

- Opened: 2020
- Construction Cost: \$78.9M in 2023 dollars*
- Owner: City of Virginia Beach; Operator: Eastern Sports Management
- Footprint: 285,000 sq. ft.
- Features:
 - 12 basketball courts convertible to 24 volleyball courts
 - 1 hydraulic banked track with 5,000 fixed seats
 - Flexible floor space for other sports such as gymnastics
- Programming:
 - Leagues, camps, clinics, and tournaments for various indoor sports
 - The facility hosted 58 multi-day sports tournaments/events for the 21-22 fiscal year.
 - The 58 events attracted over 180,000 total attendees and generated just under 53,000 contracted room nights for the 21-22 fiscal year.



RENTAL RATES

- Basketball Court (Hardcourt or Track Side): \$100 per hour per court
- Volleyball Court (Hardcourt or Track Side): \$50 per hour per court
- Entire Hardcourt Side (12 basketball/24 volleyball): \$10,000 per day
 - Entire Track Side (12 basketball/12 volleyball): \$10,000 per day
 - Track Practice: \$500 per hour
 - Track Meet: \$10,000 per day

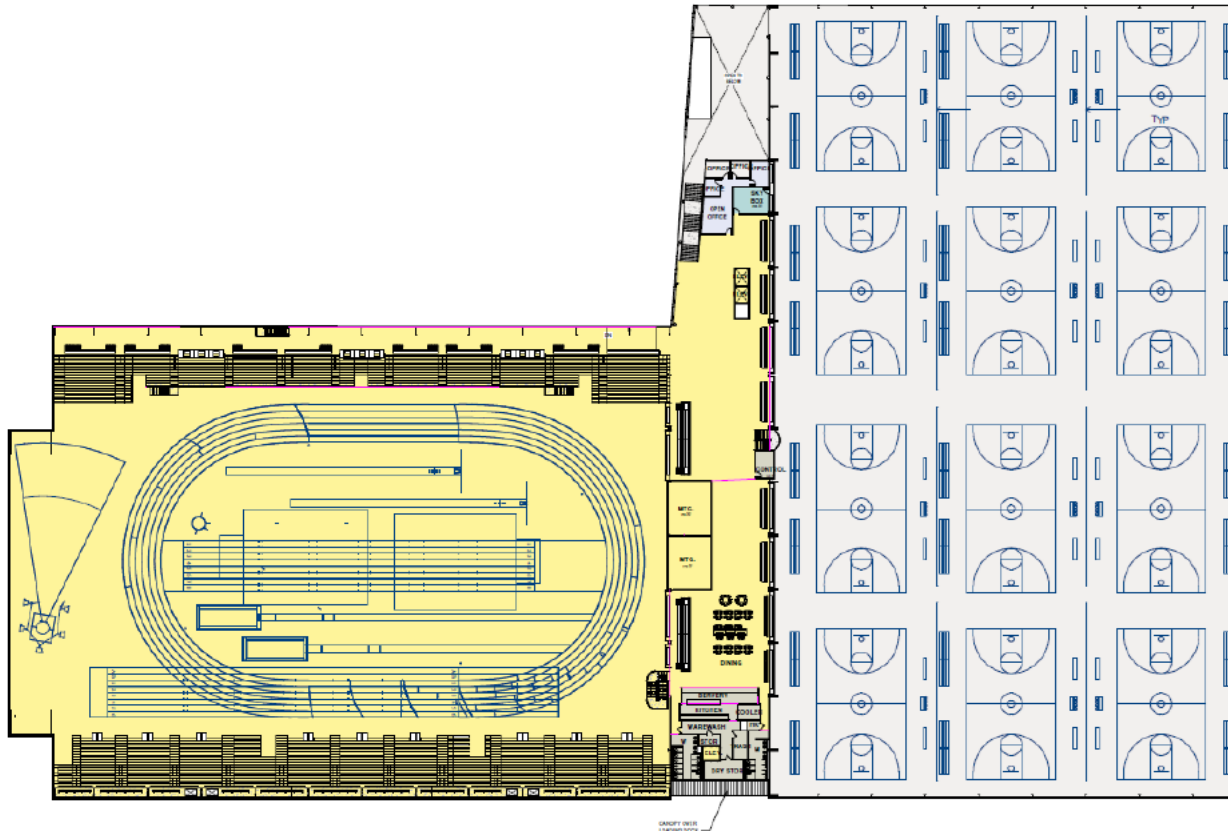
** Estimated according to the Turner Building Cost Index Q2 2023*



VIRGINIA BEACH SPORTS CENTER (CONT.)



Floor Plan





REGIONAL INDOOR SPORTS COMPLEXES SUMMARY: INVENTORY



Facility	Location	Owner	Operator	Basketball Courts	Indoor Turf Fields
Adventist Healthcare Fieldhouse	Boys, MD	Private	Private	8	2
Athletic Republic Capitol Region	District Heights, MD	Private	Private	8	-
Hagerstown Field House	Hagerstown, MD	Public	Private	6	2
Henrico Sports & Events Center	Glen Allen	Public	Public	12	-
Spooky Nook	Manheim, PA	Private	Private	10	-
Virginia Beach Sports Center	Virginia Beach, VA	Public	Private	12	-
AVERAGE				9	2
HIGH				12	2
LOW				6	2

Source: Victus research

Notes: (1) Sorted by Facility in alphabetical order. (2) Basketball courts are typically convertible to 1-2x volleyball courts.

As shown above, all facilities profiled have at least six (6) basketball courts which are convertible to at least six (6) or more volleyball courts. Only Adventist Healthcare Fieldhouse and the planned Hagerstown Field House have indoor turf.



REGIONAL INDOOR SPORTS COMPLEXES SUMMARY: RENTAL RATES



Facility	PER HOUR RATES					
	Basketball Court		Volleyball Court		Turf Field Field	
	Low	High	Low	High	Low	High
Adventist Healthcare Fieldhouse	\$60	\$60	\$60	\$60	\$195	\$245
Athletic Republic Capital Region	\$100	\$100	\$100	\$100	-	-
Virginia Beach Sports Center	\$100	\$100	\$50	\$50	-	-

Source: Victus research

Notes: (1) Sorted by Facility in alphabetical order. (2) Rental rates were not available for the Henrico Sports & Events Center and Spooky Nook.

As shown above, hourly rental rates for basketball and volleyball courts ranged between \$60 and \$100. Hourly rental rates for the turf fields at Adventist Healthcare Fieldhouse ranged between \$195 and \$245 depending on user and time of rental.



REGIONAL INDOOR SPORTS COMPLEXES SUMMARY: CONSTRUCTION COSTS



Facility	Location	Year Opened	Square Feet	Est. 2023 Construction Cost	Est. 2023 Construction Cost Per Sq. Ft.
Virginia Beach Sports Center	Virginia Beach, VA	2020	285,000	\$78,861,512	\$277
Henrico Sports & Events Center	Glen Allen, VA	2023	185,000	\$50,000,000	\$270
Hagerstown Field House	Hagerstown, MD	2025	114,000	\$24,600,000	\$216
AVERAGE			194,667	\$51,153,837	\$254
MEDIAN			185,000	\$50,000,000	\$270

Sources: Victus research. Turner Building Cost Index - Q2 2023.

Notes: (1) Sorted by Est. 2023 Construction Cost Per Sq. Ft. (2) The Adventist Healthcare Fieldhouse was omitted because the construction cost includes the outdoor fields component. (3) Spooky Nook was omitted because the facility was repurposed and not a new build.

Construction costs of the three (3) comparable facilities that were able to provide data, when adjusted to Q2 2023 dollars (the most recent available construction cost data in the Turner Building Cost Index), were built for an average cost of approximately \$254 per square foot.



4. COMPARABLE REGIONAL SPORTS FACILITY ANALYSIS B. OUTDOOR SPORTS COMPLEXES



REGIONAL OUTDOOR SPORTS COMPLEXES



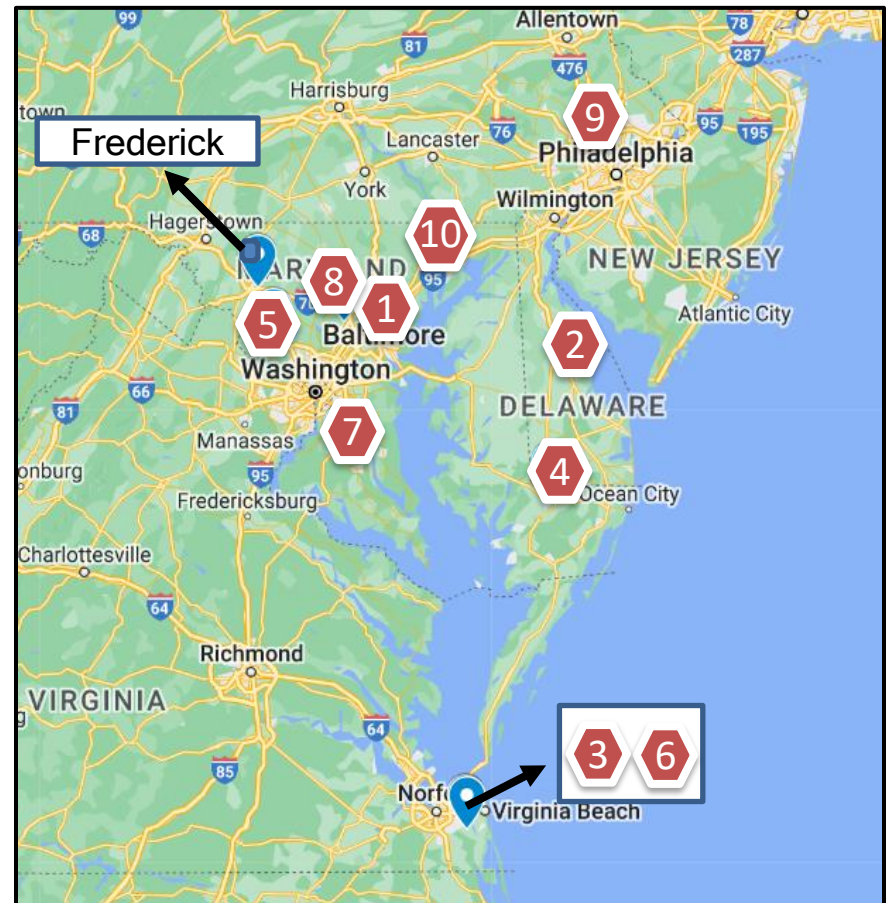
Victus Advisors analyzed regional outdoor sports complexes within a 6-hour drive of Frederick that could potentially be a competitive facility for existing or future sports tourism facilities in Frederick. Our criteria was venues with a minimum of eight (8) rectangular fields and/or a minimum of six (6) baseball/softball fields.

Facility

- 1 Bachman Sports Complex
- 2 DE Turf Sports Complex
- 3 Hampton Roads Soccer Complex
- 4 Henry S. Parker Athletic Complex
- 5 Maryland Soccerplex
- 6 Princess Anne Athletic Complex
- 7 Robert D. Stethem Memorial Sports Complex
- 8 The Bob Lucido Fields at Covenant Park
- 9 The Proving Grounds
- 10 The Ripken Experience Aberdeen

Notes: (1) Sorted in alphabetical order

(2) This is not intended to be a comprehensive inventory, rather we have profiled the regional facilities that were most often referenced by local stakeholders and regional user groups.



Source: Google Maps



BACHMAN SPORTS COMPLEX



Glen Burnie, MD

- Owner: Anne Arundel County
- Operator: Anne Arundel County Department of Recreation and Parks
- Footprint: 55 acres
- Features:
 - 6 softball fields
 - 1 baseball field
 - 1 multi-use rectangular field
- Programming:
 - The facility hosts recreational, competitive leagues, and tournaments for softball.
 - The facility typically hosts tournaments every weekend (weather permitting) March through the end of October.



ANNE ARUNDEL
COUNTY
MARYLAND



RENTAL RATES

- Softball Fields (Games and Practices): \$40 per hour per field
 - All Softball Fields (Tournaments): \$1,750 per day



DE TURF SPORTS COMPLEX



Milford, DE

- Opened: 2017
- Construction Cost: \$31.4M in 2023 dollars*
- Owner/Operator: Kent County Regional Sports Complex Corp.
- Funding: 100% public via Kent County Municipal Bonds
- Features:
 - 12 full-sized artificial turf fields
 - 700-seat capacity on “championship stadium”
 - Multi-purpose room
- Programming:
 - DE Turf hosts leagues, camps, and tournaments year-round for lacrosse, soccer, and field hockey.



RENTAL RATES

- \$75 per hour per field (local resident rate)
 - \$150 per hour per field (for games)
 - \$200 per hour (championship field)
 - \$1,350 per day per field (tournaments)
- Additional \$25 per hour per field cost for lights



DE TURF SPORTS COMPLEX (CONT.)



Site Map





HAMPTON ROADS SOCCER COMPLEX



Virginia Beach, VA

- Opened: 1997
- Owner: City of Virginia Beach
- Operator: Hampton Roads Soccer Council
- Footprint: 75 acres
- Features:
 - 25 grass soccer fields of various sizes
 - 2 artificial turf fields
- Programming:
 - Leagues and tournaments for soccer, football, field hockey, etc.
- Economic Impact:
 - The facility hosted 9 multi-day sports tournaments/events for the 2022 fiscal year. The 9 events attracted nearly 50,000 total attendees and generated just over 9,100 contracted room nights for the 2022 fiscal year.



RENTAL RATES

- Field Rental (Affiliate Soccer Clubs): \$49 per hour per field (grass or turf)
- Field Rental (Non-Affiliate Users): \$60 per hour per field (grass); \$125 per hour per field (turf)



HAMPTON ROADS SOCCER COMPLEX (CONT.)



Site Map





HENRY S. PARKER ATHLETIC COMPLEX



Salisbury, MD

- Owner/Operator: Wicomico County Recreation, Parks, & Tourism
- Footprint: 41 acres
- Features:
 - 8 baseball/softball fields (various sizes)
 - 2 concession stands
 - 2 meeting rooms
 - Playground area
- Programming:
 - The facility is projected to host over 15 baseball and softball tournaments in 2023; generating over 21,000 hotel room nights, and an estimated direct economic impact of \$19.2 million.

Wicomico County
Recreation, Parks & Tourism



RENTAL RATES

- The facility is not available to rent for local usage.



HENRY S. PARKER ATHLETIC COMPLEX (CONT.)



Site Map





MARYLAND SOCCERPLEX



Boys, MD

- Opened: 2000
- Construction Cost: \$32.1M in 2023 dollars* (Indoor and outdoor)
- Owner/Operator: Maryland Soccer Foundation
- Features:
 - 24 outdoor multipurpose fields
 - Championship field with 5,000-seat capacity
- Programming:
 - Adult and youth leagues and tournaments for soccer, lacrosse, and rugby.
 - The facility hosts more than one million annual visitors.



MARYLAND
SoccerPlex & Adventist HealthCare Fieldhouse



RENTAL RATES

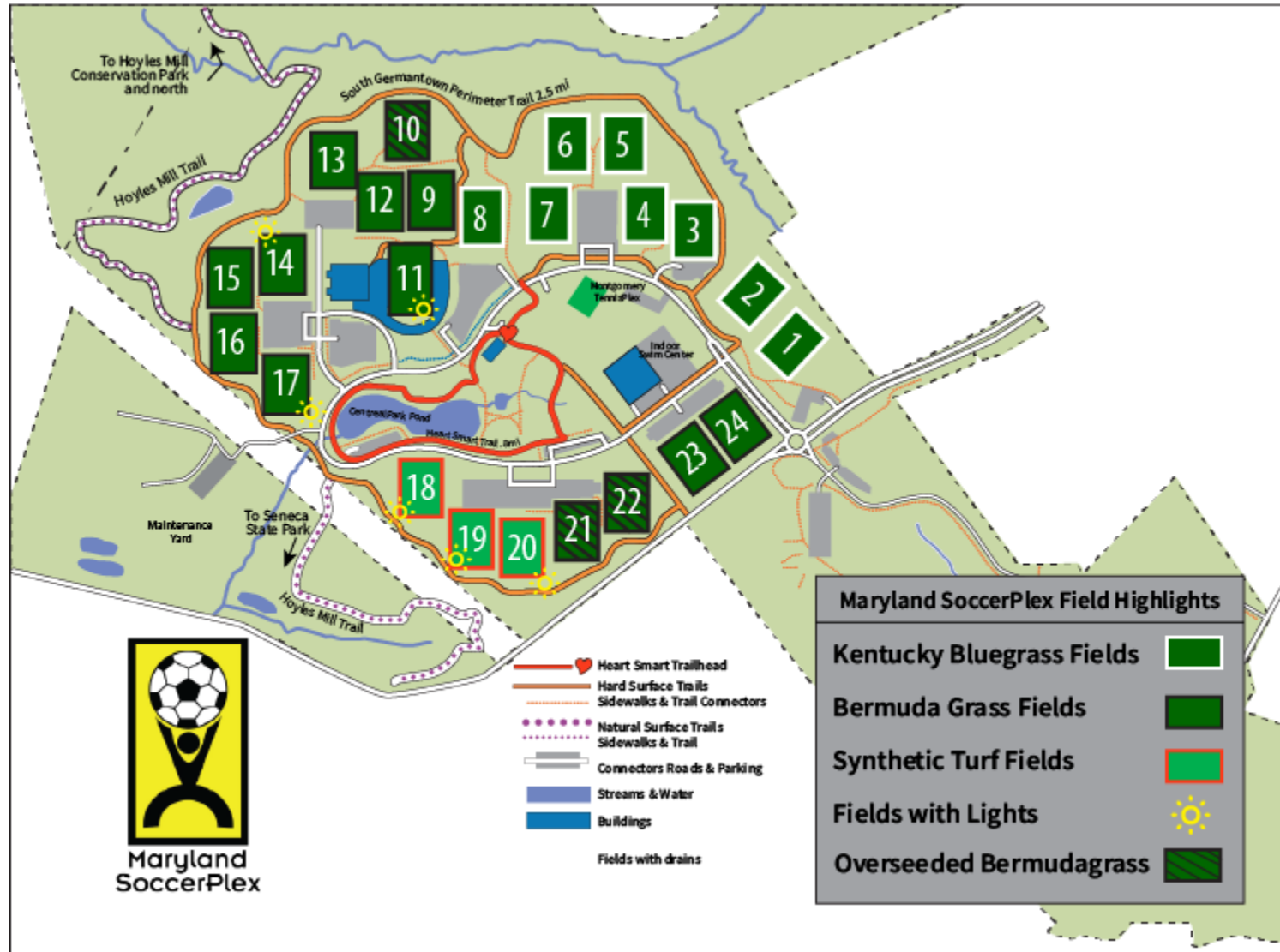
- Half Field: \$85 per hour per field (no lights); \$125 per hour per field (lights)
- Full Field: \$170 per hour per field (no lights); \$210 per hour per field (lights)



MARYLAND SOCCERPLEX



Site Map





PRINCESS ANNE ATHLETIC COMPLEX



Virginia Beach, VA

- Opened: 2007
- Construction Cost: \$24.8M in 2023 dollars*
- Owner: City of Virginia Beach
- Operator: Virginia Beach Parks & Recreation
- Features:
 - 8 multi-use fields; 4 are lighted and artificial
 - 8 lighted softball fields
- Programming:
 - Practices, leagues, games, and tournaments for softball, soccer, etc.
- Economic Impact:
 - The facility hosted 20 multi-day sports tournaments/events for the 2022 fiscal year.
 - The 20 events attracted over 31,000 total attendees and generated over 13,500 contracted room nights for the 2022 fiscal year.



RENTAL RATES

- Multi-Use Fields (All 8 & Multi-Day): \$58 per hour per field (artificial) \$26 per hour per field (grass)
 - Multi-Use Fields (All Artificial & Multi-Day): \$63 per hour per field
- Multi-Use Fields (Hourly): \$35-\$73 per hour per field depending on type of field, time of day, and day of week.
 - Softball Fields (Partial Day): \$175 per field
 - Softball Fields (Full Day): \$225 per field

** Estimated according to the Turner Building Cost Index Q2 2023*



PRINCESS ANNE ATHLETIC COMPLEX (CONT.)



Site Map





ROBERT D. STETHEM MEMORIAL SPORTS COMPLEX

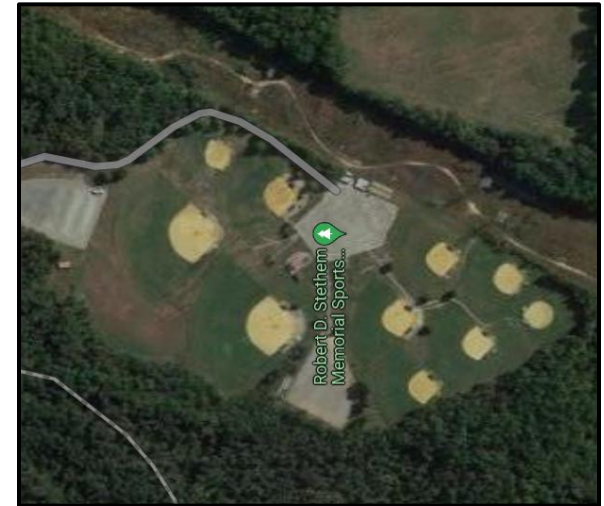


Waldorf, MD

- Opened: 2007
- Owner: Charles County
- Operator: Charles County Recreation & Parks
- Features:
 - 10 baseball fields (various sizes)
 - 1 football practice area
- Programming:
 - Practices, leagues, games, and tournaments for baseball.



Charles County
Maryland



RENTAL RATES

- Practice: \$12 per hour per field (\$3 per hour per additional field)
 - Day Games: \$12 per game per field
 - Night Games: \$18 per game per field



THE BOB LUCIDO FIELDS AT COVENANT PARK

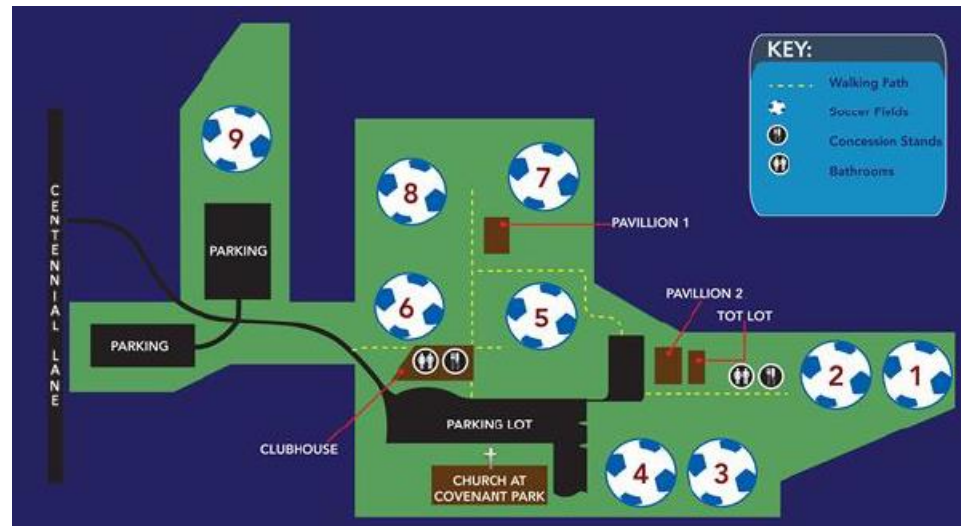


Ellicott City, MD

- Owner/Operator: Soccer Association of Columbia (SAC)
- Features:
 - 8 soccer fields (5 turf and 3 natural grass)
- Programming:
 - SAC and Baltimore Armour programming



Site Map





THE PROVING GROUNDS



Conshohocken, PA

- Owner/Operator: Private
- Features:
 - 8 multi-use rectangular fields
 - 1 indoor multi-use rectangular field (10,000 sq. ft. facility)
 - Indoor batting tunnels
- Programming:
 - Practices, leagues, games, and tournaments for soccer, field hockey, lacrosse, rugby, and football.



RENTAL RATES

- Full Field: \$170 per hour per field
- Half Field: \$105 per hour per field



THE PROVING GROUNDS (CONT.)



Site Map





THE RIPKEN EXPERIENCE ABERDEEN



Aberdeen, MD

- Opened: 2002
- Construction Cost: \$46.3M in 2023 dollars*
- Owner/Operator: Private
- Features:
 - 9 adjustable fields
 - 15 batting cages
 - 16 bullpens
 - 1 warm-up area
 - Hotel on-site
- Programming:
 - 3-4 game and week-long tournaments for 8U-18U
 - 17 (3-game) tournaments in 2022
 - 3 (week-long) tournaments planned for 2023
- Economic Impact:
 - According to facility operators the complex generates over \$30 million in economic impact in Aberdeen.
 - The complex is projected to draw over 1,500 teams, 25,000 participants, and 100,000 visitors to Aberdeen.





THE RIPKEN EXPERIENCE ABERDEEN



Site Map





REGIONAL OUTDOOR SPORTS COMPLEXES SUMMARY: INVENTORY



Facility	Location	Owner	Operator	Rectangular Fields	Ball Fields
Bachman Sports Complex	Glen Burnie, MD	Public	Public	1	7
DE Turf Sports Complex	Milford, DE	Public	Public	12	-
Hampton Roads Soccer Complex	Virginia Beach, VA	Public	Private	25	-
Henry S. Parker Athletic Complex	Salisbury, MD	Public	Public	-	8
Maryland Soccerplex	Boysds, MD	Private	Private	24	-
Princess Anne Athletic Complex	Virginia Beach, VA	Public	Public	8	8
Robert D. Stethem Memorial Sports Complex	Waldorf, MD	Public	Public	1	10
The Bob Lucido Fields at Covenant Park	Ellicott City, MD	Private	Private	8	-
The Proving Grounds	Conshohocken, PA	Private	Private	8	-
The Ripken Experience Aberdeen	Aberdeen, MD	Private	Private	-	9
AVERAGE				11	8
HIGH				25	10
LOW				1	7

Source: Victus research

Note: Sorted by Facility in alphabetical order.

As shown above, the Hamptons Roads Soccer Complex has the most rectangular fields at 25 while the Robert D. Stethem Memorial Sports Complex has the most ball fields at 10.



REGIONAL OUTDOOR SPORTS COMPLEXES SUMMARY: RENTAL RATES



Facility	PER HOUR RATES				DAILY TOURNAMENT RATE
	Rectangular Field		Ball Field		
	Low	High	Low	High	
Bachman Sports Complex	-	-	\$40	\$40	\$1,750
DE Turf Sports Complex	\$75	\$200	-	-	\$16,200
Hampton Roads Soccer Complex	\$49	\$125	-	-	-
Maryland Soccerplex	\$170	\$210	-	-	-
Princess Anne Athletic Complex	\$35	\$73	\$26	\$26	\$1,800
Robert D. Stethem Memorial Sports Complex	-	-	\$12	\$18	-
The Proving Grounds	\$170	\$170	-	-	-

Source: Victus research

Notes: (1) Sorted by Facility in alphabetical order. (2) Rental rates were not available for the Henry S. Parker Athletic Complex.

As shown above, hourly rental rates for rectangular fields range between \$35 and \$210. Hourly ball field rentals range from \$12 to up to \$40.



REGIONAL OUTDOOR SPORTS COMPLEXES SUMMARY: CONSTRUCTION COSTS



Facility	Location	Year Opened	Total Fields	Est. 2023 Construction Cost	Est. 2023 Construction Cost Per Field
The Ripken Experience Aberdeen	Aberdeen, MD	2002	9	\$46,308,562	\$5,145,396
DE Turf Sports Complex	Milford, DE	2017	12	\$31,379,310	\$2,614,943
Princess Anne Athletic Complex	Virginia Beach, VA	2007	16	\$24,774,590	\$1,548,412
AVERAGE			12	\$34,154,154	\$3,102,917
MEDIAN			12	\$31,379,310	\$2,614,943

Sources: Victus research. Turner Building Cost Index - Q2 2023.

Notes: (1) Sorted by Est. 2023 Construction Cost Per Field (2) The Maryland Soccerplex was omitted because the construction cost includes the indoor component. (3) Spooky Nook was omitted because the facility was repurposed and not a new build.

Construction costs of the three (3) comparable facilities that were able to provide data, when adjusted to Q2 2023 dollars (the most recent available construction cost data in the Turner Building Cost Index), were built for an average cost of approximately \$3.1 million per field.

It should also be noted that the Ripken Experience Aberdeen facility is significantly more expensive on a per-field basis because it is a showcase complex for Ripken Baseball. The complex is located in the Ripken family's hometown, and it features replicas of Major League Baseball ballparks, as well as a 114-room hotel.



4. COMPARABLE REGIONAL SPORTS FACILITY ANALYSIS C. INDOOR ICE FACILITIES



INDOOR ICE FACILITIES



Victus Advisors analyzed other regional indoor ice facilities within a 6-hour drive of Frederick that could potentially be a competitive facility for existing or future sports tourism facilities in Frederick. Our criteria was venues with a minimum of two (2) ice sheets.

Facility

- 1 Ashburn Ice House
- 2 Chilled Ponds Ice Sports Complex
- 3 ION International Training Center
- 4 Rockville Ice Arena
- 5 The Gardens Ice House

Notes: (1) Sorted in alphabetical order

(2) This is not intended to be a comprehensive inventory, rather we have profiled the regional facilities that were most often referenced by local stakeholders and regional user groups.



Source: Google Maps



ASHBURN ICE HOUSE



Ashburn, VA

- Owner/Operator: Private
- Features:
 - 2 NHL-sized ice sheets
 - Video arcade
 - Restaurant
 - Pro shop
- Programming:
 - Programming for public skating sessions, birthday parties, learn to skate programs, adult hockey and youth hockey leagues.
 - The facility hosts about 500,000 visitors per year.





CHILLED PONDS ICE SPORTS COMPLEX



Chesapeake, VA

- Owner/Operator: Private
- Footprint: 90,000 sq. ft.
- Features:
 - 2 NHL-sized ice sheets
 - 12 total locker rooms
 - Bleacher seating for 200 spectators (main arena) and 100 (secondary rink)
 - Bar/Grill
 - Pro shop
 - Physical therapy and training clinic
- Programming:
 - Programming for public skating sessions, birthday parties, learn to skate programs, adult hockey and youth hockey leagues.
 - Have hosted tournaments and meets for hockey and figure skating.
 - Chilled Ponds is the official practice facility for the Norfolk Admirals of the East Coast Hockey League (ECHL).



RENTAL RATES

- \$350-\$425 per hour per ice sheet depending on user and time/day.
- Tidewater Figure Skating Club pays \$425 per hour per ice sheet.



ION INTERNATIONAL TRAINING CENTER



Leesburg, VA

- Opened: 2019
- Construction Cost: \$30.1M in 2023 dollars*
- Owner/Operator: Private
- Footprint: 90,000 sq. ft.
- Features:
 - 2 NHL-sized ice sheets
 - 8 locker rooms
 - Bleacher seating for 3,500 spectators (main arena)
 - Café and pro shop
 - Medical room and training room
- Programming:
 - Programming for public skating sessions, birthday parties, learn to skate programs, adult hockey and youth hockey leagues.
 - The facility hosts hockey tournaments and figure skating meets.
 - Events are projected to bring in \$20 million in tax revenue into Loudoun County every year.



RENTAL RATES

- Main arena: \$550 per hour; Practice rink: \$450 per hour



ROCKVILLE ICE ARENA



Rockville, MD

- Owner/Operator: Private
- Features:
 - 3 ice sheets
 - 12 locker rooms
 - Restaurant
 - Pro shop
- Programming:
 - Home of Montgomery Youth Hockey Association
 - Programming for public skating sessions, birthday parties, learn to skate programs, adult hockey and youth hockey leagues and tournaments.





THE GARDENS ICE HOUSE



Laurel, MD

- Owner/Operator: Private
- Footprint: 150,000 sq. ft.
- Features:
 - 3 full-sized ice sheets
 - 1 goalie training ice sheet
 - Private rooms
 - Full gym
 - Curling center
 - Cafe
 - Pro shop
- Programming:
 - Home to five youth hockey programs.
 - Programming for public skating sessions, birthday parties, learn to skate programs, adult hockey and youth hockey leagues.
 - The facility also hosts tournaments and the Maryland high school state championships.

The Gardens
ICE HOUSE





INDOOR ICE FACILITIES SUMMARY: INVENTORY



<u>Facility</u>	<u>Location</u>	<u>Owner</u>	<u>Operator</u>	<u>Ice Sheets</u>
Ashburn Ice House	Ashburn, VA	Private	Private	2
Chilled Ponds Ice Sports Complex	Chesapeake, VA	Private	Private	2
ION International Training Center	Leesburg, VA	Private	Private	2
Rockville Ice Arena	Rockville, MD	Private	Private	3
The Gardens Ice House	Laurel, MD	Private	Private	3
AVERAGE				2
HIGH				3
LOW				2

Source: Victus research

Note: Sorted by Facility in alphabetical order.

As shown above, Victus found five (5) facilities with at least two (2) ice sheets. Rockville Ice Arena and the Gardens Ice House have three (3) ice sheets.



4. COMPARABLE REGIONAL SPORTS FACILITY ANALYSIS D. INDOOR AQUATIC FACILITIES



INDOOR AQUATIC FACILITIES



Victus Advisors analyzed regional indoor aquatic facilities within a 6-hour drive of Frederick that could potentially be a competitive facility for existing or future sports tourism facilities in Frederick. Our criteria was venues with an indoor 50-meter competition pool.

Facility

- 1 Collegiate School Aquatics Center
- 2 Hampton Aquaplex
- 3 Henry A. Rosenberg Jr. Aquatic Center
- 4 Lloyd Aquatic Center
- 5 Prince George's Sports & Learning Complex

Note: Sorted in alphabetical order



Source: Google Maps



COLLEGIATE SCHOOL AQUATICS CENTER



Richmond, VA

- Owner/Operator: SwimRVA
- Footprint: 54,000 sq. ft.
- Features:
 - 8-lane, 50-meter competition pool
 - 25-yard programming pool
 - Spectator seating for 700
 - Therapy pool
 - Community room
 - Locker rooms
- Programming:
 - Regional and national swimming meets
 - SwimRVA programs



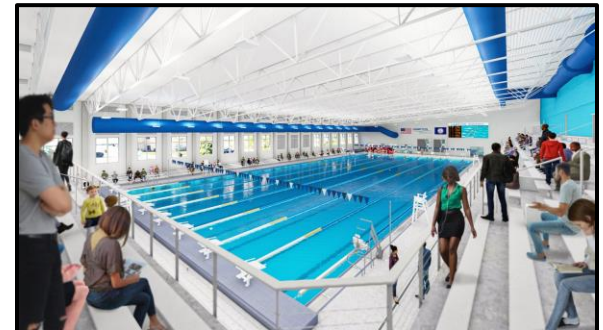


HAMPTON AQUAPLEX



Hampton, VA

- Opened: 2022
- Construction Cost: \$30.7M in 2023 dollars*
- Owner: City of Hampton
- Operator: Eastern Sports Management
- Footprint: 62,739 sq. ft.
- Features:
 - 8-lane, 50-meter competition pool
 - 25-yard programming pool
 - Spectator seating for 1,500 with on-deck seating for 760
 - Two (2) 1-Meter Springboards for Competitive Diving
 - Two (2) 3-Meter Springboards For Competitive Diving
 - One (1) multi-purpose room
 - One (1) team room
 - Culinary Center Concession Food and Beverage Service
 - Outdoor splash park
- Programming:
 - Regional and national swimming and diving events
 - Local school swim teams
 - Fitness and certified swim classes
 - Open-swim for all ages, along with event rentals



** Estimated according to the Turner Building Cost Index Q2 2023*



HENRY A. ROSENBERG JR. AQUATIC CENTER



Owings Mills, MD

- Opened: 2006
- Construction Cost: \$11M in 2023 dollars*
- Owner/Operator: McDonogh School
- Features:
 - 24,000 sq. ft. facility
 - 8-lane, 50-meter competition pool
- Programming:
 - The facility hosts 9 to 10 USA Swimming meets and 16 high school and college dual meets.

MCDONOGH



RENTAL RATES

- \$275 to \$450 per hour depending on user



LLOYD AQUATIC CENTER



Owings Mills, MD

- Opened: 2020
- Construction Cost: \$20.9M in 2023 dollars*
- Owner/Operator: Mercersburg Academy
- Footprint: 41,000 sq. ft.
- Features:
 - 10-lane, 50-meter competition pool
 - Diving area
 - Locker rooms
- Programming:
 - The facility typically hosts 3 to 4 USA Swimming meets and 6 high school meets per year.



RENTAL RATES

- Practice: \$75 for 2 hours
- Swim Meet (One Day): \$1,000
- Swim Meet (Two Days): \$1,800



Landover, MD



Prince George's Sports & Learning Complex

- Opened: 2000
- Construction Cost: \$89.9M in 2023 dollars*
- Owner/Operator: Prince George's County
- Footprint: 80 acres
- Features:
 - 10-lane, 50-meter competition pool
 - Diving area
 - Locker rooms
 - Leisure pool
 - 75,000 sq. ft. field house
 - 200-meter flat track with 3,500-seat capacity
 - 25,000 sq. ft. gymnastics center
 - Outdoor track and sports field
- Programming:
 - Tournaments for basketball, volleyball, soccer, lacrosse, field hockey, etc.
- Additional Note:
 - The competition Pool was closed in early 2023 for continued maintenance assessment.





OTHER INDOOR SPORTS FACILITIES SUMMARY: INVENTORY



Facility	Location	Owner	Operator	50-M Pool
Collegiate School Aquatics Center	Richmond, VA	Private	Private	1
Hampton Aquaplex	Hampton, VA	Public	Private	1
Henry A. Rosenberg Jr. Aquatic Center	Salisbury, MD	Private	Private	1
Lloyd Aquatic Center	Owings Mills, MD	Private	Private	1
Prince George's Sports & Learning Complex	Landover, MD	Public	Public	1
AVERAGE				1
HIGH				1
LOW				1

Source: Victus research

Note: Sorted by Facility in alphabetical order.

As shown above, Victus found five (5) facilities with indoor 50-meter competition pools. It should be noted that most facilities with competition pools also have diving areas and other swim meet amenities.



OTHER INDOOR SPORTS FACILITIES SUMMARY: CONSTRUCTION COSTS



Facility	Location	Year Opened	Square Feet	Est. 2023 Construction Cost	Est. 2023 Construction Cost Per Sq. Ft.
Lloyd Aquatic Center	Mercersburg, PA	2020	41,000	\$20,875,106	\$509
Hampton Aquaplex	Hampton, VA	2022	62,739	\$30,743,243	\$490
Henry A. Rosenberg Jr. Aquatic Center	Owings Mills, MD	2006	24,000	\$11,016,393	\$459
AVERAGE			42,580	\$20,878,248	\$486
MEDIAN			41,000	\$20,875,106	\$490

Sources: Victus research. Turner Building Cost Index - Q1 2023.

Notes: (1) Sorted by Est. 2023 Construction Cost Per Sq. Ft. (2) Prince George's Sports & Learning Complex was omitted because the construction cost includes additional components beyond the competition pool.

Construction costs of the three (3) comparable facilities that were able to provide data, when adjusted to Q2 2023 dollars (the most recent available construction cost data in the Turner Building Cost Index), were built for an average cost of approximately \$486 per square foot.



COMPARABLE REGIONAL SPORTS FACILITY ANALYSIS: SUMMARY



Indoor Sports Complexes (Inventory): All facilities profiled have at least eight (8) basketball courts which are convertible to at least eight (8) or more volleyball courts. Only Adventist Healthcare Fieldhouse had indoor turf.

Indoor Sports Complexes (Construction Costs): Construction costs of the four (4) comparable facilities that were able to provide data, when adjusted to Q1 2023 dollars (the most recent available construction cost data in the Turner Building Cost Index), were built for a median cost of approximately \$52.3 million.

Outdoor Sports Complexes (Inventory): The Hamptons Roads Soccer Complex has the most rectangular fields at 25 while the Robert D. Stethem Memorial Sports Complex has the most ball fields at 10.

Indoor Ice Facilities: Victus found five (5) facilities with at least two (2) ice sheets. Rockville Ice Arena and the Gardens Ice House have three (3) ice sheets.

Indoor Aquatic Facilities: Victus found five (5) facilities with indoor 50-meter competition pools. It should be noted that most facilities with competition pools also have diving areas and other swim meet amenities.



5. STAKEHOLDER INTERVIEW SUMMARIES



OVERVIEW



In May, June, and July 2023, Good Works Frederick identified participants and scheduled a series of in-person, virtual, and telephone interviews for Victus Advisors. The goals of these interviews were to gather feedback from key stakeholders, community leaders, and potential project partners regarding the market potential for the proposed Maryland Sports & Learning Campus. The set of topics and questions included perceptions of Greater Frederick's current sports facility offerings, potential support for the project, opportunities for public-public and/or public-private partnerships, and other such feedback concerning the proposed venue.

INTERVIEWS - Victus Advisors conducted in-person, virtual and telephone interviews with representatives from the following 13 stakeholder groups (in alphabetical order):

- Ausherman Family Foundation
- City of Frederick
- City Youth Matrix
- Downtown Frederick
- Frederick County Chamber of Commerce
- Frederick County Office of Economic Development
- Frederick County School District
- Frederick Health
- Frederick Indoor Sports Center (Former Owner of the Closed Facility)
- Golden Mile Alliance
- Maryland Sports Commission
- United Way of Frederick County
- Visit Frederick



STAKEHOLDER SUMMARY



PERCEPTIONS OF CURRENT SPORTS FACILITIES IN FREDERICK COUNTY

- Several stakeholders indicated that there is essentially no indoor court space for basketball, volleyball, and other court sports. A few mentioned that the only options for basketball are at Hood College, Frederick Community College, and Mount St. Mary's University.
- One stakeholder mentioned that Frederick County has a lot of field space for lacrosse and soccer and cited three to four regional parks in the County. They added that there is some tournament activity in those facilities. Another stakeholder stated that FC Frederick is currently trying to develop a new soccer facility, although there is no known completion date.
- Another stakeholder shared that baseball groups used to use Baker Park, but the park started having serious flooding issues every couple of months. They added that there are some other City fields that are very poorly maintained and can't be used for games. Lastly, they felt that there is a big need for intermediate-age ball fields as well, and a place where they could host regional tournaments.
- One stakeholder indicated that there is limited pool access in the County and a larger leisure and competition pool is needed in the community.



STAKEHOLDER SUMMARY (CONT.)



SUPPORT FOR ADDITIONAL SPORTS FACILITY DEVELOPMENT IN FREDERICK COUNTY

- Generally speaking, stakeholders were very supportive of proposed Maryland Sports & Learning Campus. There was some concern however, among a few stakeholders about access to families with limited financial resources and a lack of transportation options.
- One stakeholder stated that the economic benefits of the proposed venue would positively affect both the City of Frederick and Frederick County with new jobs, increased tax revenues, and general wealth. They added that the proposed facility could also support businesses on the Golden Mile and the hospitality industry would greatly benefit from multi-day events.
- A few stakeholders indicated that Frederick County's population is growing and they're the fastest growing county in Maryland. They added that the County is well-balanced with a mix of young and older individuals. Lastly, they suggested that the community as a whole is largely wealthy compared to other communities, so there is probably an overall willingness to pay for sports recreation from most families. That said, one stakeholder mentioned there is a portion of the community especially on the west side of the town, that likely can't afford to pay for sports recreation.
- Many stakeholders were excited about the possibility of not having to travel outside of Frederick County for practices and games. They indicated that they frequently travel to Prince George's County and Montgomery County.



STAKEHOLDER SUMMARY (CONT.)



PERCEPTION OF FREDERICK COUNTY AS A HOST OF REGIONAL SPORTS TOURNAMENTS

- Generally speaking, stakeholders felt that Frederick County is an attractive tourism destination, and the right sports facility or facilities would only enhance the County's reputation. One stakeholder indicated that almost two million visitors come to Frederick County on annual basis, generating over \$450 million in direct spending. There was a general consensus that a lack of sports tourism-caliber facilities in Frederick County was the only thing preventing the area from attracting more events.
- Several stakeholders felt that Visit Frederick does a great job at marketing the region to spur tourism. That said, Visit Frederick currently does not have a dedicated sports marketing staff or budget.
- Stakeholders also felt that Frederick County has a strong inventory of affordable and family-friendly hotels. Additionally, they think that local restaurants are competitively priced.

POTENTIAL PARTNERSHIP OPPORTUNITIES

- Feedback was mixed by stakeholders when it came to their thoughts on potential public-private partnerships for the development of the proposed facility. Some stakeholders were very optimistic that organizations from the private sector would be interested. Others were worried that there wouldn't be enough public support for a project of this scale.



SCHOOL DISTRICTS NEEDS

- From a high school athletics standpoint, the interviewee indicated that Frederick County is so large and spread out, so the collective centralized single facility hasn't typically worked for the school district. They added that the school district is building a new high school soon, and they typically build the sports facilities they need at each high school site, except for swimming and indoor track.
- The interviewee also stated that there are only two (2) pools in Frederick County at the high school level, and they're both 50 years old. They sit empty during the day, and the interviewee thinks it would be great if there was a different shared-use model that could maximize usage.
- The interviewee felt that if there was an indoor track in Frederick County, it would attract visitors from Western Maryland, Howard County, Montgomery County, and Carroll County, at a minimum. They stated that there just aren't enough facilities and venues for indoor track programs locally to train.
- Lastly, the interviewee indicated that the school district is interested in having discussions with other public entities in the Frederick area about a shared facility for aquatics and for indoor track.



CITY OF FREDERICK PARKS & RECREATION MASTER PLAN

In 2021, the City of Frederick engaged a consultant to conduct a parks & recreation master plan. The report was delivered in 2022. Below are the key finding and recommendations which are relevant to this study.

- The master plan identified recurring feedback from community members regarding the lack of tournament-caliber sports facilities, turf fields, and additional recreational facilities to meet future population demands.
- The development of a new indoor recreation facility as a part of the Westside Regional Park.
- Consider the development of a sports tourism-caliber facility.
- Conduct a feasibility study for an indoor aquatic facility .

It should ne noted that the master plan called for development of new facilities and amenities should be focused on the west side of the City of Frederick which has been a historically under-served area.



6. LOCAL USER GROUP & REGIONAL SPORTS EVENT INTERVIEWS



OVERVIEW



In May, June, and July 2023, Victus Advisors conducted telephone interviews with a representative sample of local sports groups and regional sports event organizers who could be potential users of proposed Maryland Sports & Learning Campus. The goals of these interviews were to gather feedback regarding the market opportunity for local and regional events to be held at the proposed facility. Interviewees shared which local facilities they use, comparable out-of-market venues, minimum amenities required to attract events, and other feedback concerning the proposed venue.

INTERVIEWS - Victus Advisors conducted telephone interviews with representatives from the following 25 local and regional sports groups and event organizers (in alphabetical order):

- Big Shots Basketball
- Bocce Enthusiast
- Crossover Hoops
- East Frederick Little League
- FC Frederick
- Frederick American Little League (FALL)
- Frederick Area Divers
- Frederick Area Swim Team (FAST)
- Frederick County Girls Softball League
- Frederick Freeze
- Frederick Girls Softball
- Frederick National Little League
- Frederick Rugby
- Frederick Skyline C.F.
- Frederick Volleyball Club
- Glade Valley Athletic Association (GVAA)
- i9Sports
- Linganore, Oakdale, Urbana Youth Athletic Association (LOUYAA)
- Maryland AAU
- Maryland Swimming
- Monocacy Swim Club
- USA Pickleball Baltimore Central Maryland
- USA Pickleball Frederick
- Sertoma Basketball
- Team Maryland Lacrosse



USER & EVENT INTERVIEW SUMMARY



LOCAL (FREDERICK COUNTY) SPORTS FACILITIES USED

AQUATICS

- Fort Detrick Family and MWR
- Hood College
- Onelife Fitness
- Middletown High School and Walkersville High School

BOCCE

- Baker Park

BASEBALL/SOFTBALL

- Ballenger Creek Middle School (Tee-Ball)
- LOUYAA Park
- City and County-owned fields

BASKETBALL/VOLLEYBALL

- Frederick County Public Schools
- Rented warehouse

FIELD HOCKEY/LACROSSE

- Frederick County Parks and Recreation fields
- Heritage Farm Park
- LOUYAA Park



LOCAL (FREDERICK COUNTY) SPORTS FACILITIES USED (CONT.)

FOOTBALL

- Ballenger Creek Middle School
- Heritage Farm Park

HOCKEY

- Skate Frederick

PICKLEBALL

- Public Outdoor Parks and indoor recreation centers

RUGBY

- City and County-owned fields

SOCCER

- City and County-owned fields
- Ballenger Creek Middle School
- Heritage Farm Park
- LOUYAA Park



COMPARATIVE VENUES USED BY INTERVIEWEES

AQUATICS

- Collegiate School Aquatics Center (Richmond, Virginia)
- Henry A. Rosenberg Jr. Aquatic Center (Owing Mills, Maryland)
- Lloyd Aquatic Center (Mercersburg, Pennsylvania)
- Prince George's Sports & Learning Complex (Landover, Maryland)

BASEBALL/SOFTBALL

- Thurmont Little League Fields (Thurmont, MD)

BASKETBALL/VOLLEYBALL

- Adventist Healthcare Fieldhouse (Boyds, MD)

HOCKEY

- ION International Training Center (Leesburg, VA)

LACROSSE

- DE Turf Sports Complex (Frederica, Delaware)
- The Proving Grounds (Conshohocken, Pennsylvania)

SOCCER

- Maryland Soccerplex (Boyds, MD)
- The Bob Lucido Fields at Covenant Park (Ellicott City, MD)



DEMAND & IDEAL AMENITIES FOR A NEW SPORTS FACILITY

AQUATICS

- FAST's ideal aquatic facility would feature a 50-meter, 8-lane, competitive pool. Furthermore, the facility should have a warm-up pool, spectator seating, and locker rooms for both competitive swimmers and the general public.
- Monocacy Aquatic Club and Maryland Swimming also believe the community needs a 50-meter, 8-lane competitive pool. Additional requested features and amenities include warm-up and warm-down pools, bleacher seating for up to 1,500 spectators, office and flex room space, locker rooms, and a weight room.
- Frederick Area Divers would like to see an aquatic facility that had a separate dive well with diving boards. They would also recommend diving platforms and dry land training space that includes trampolines and dry boards.

BASEBALL/SOFTBALL

- Baseball and softball groups would like to see either a four-plex for each sport, or a combined complex that could adapt to both. Additionally, groups think there is also demand for indoor batting cages.



USER & EVENT INTERVIEW SUMMARY (CONT.)



DEMAND & IDEAL AMENITIES FOR A NEW SPORTS FACILITY (CONT.)

BASKETBALL/VOLLEYBALL

- Sertoma Basketball would like to see an indoor facility that has up to 10 courts. They believe this would not only meet demand for their group but provide enough courts for other basketball groups in the region and thus minimize fighting over the same schools. They added that the facility should also have locker rooms and flex rooms.
- AAU Maryland felt that an eight (8)-court facility in Frederick could attract frequent basketball activity. They also stressed the importance of making the venue multi-use for other sports like volleyball and pickleball. Big Shots stated that 12 courts would be ideal.
- Frederick Volleyball Club indicated that they would use up to six (6) more indoor volleyball courts in the market if it were available to supplement their programming that is currently at a warehouse. They also felt there is growing demand for indoor beach volleyball and up to four (4) courts would be used if developed.

LACROSSE

- Team Maryland Lacrosse indicated that the community needs a multi-turf complex with up to 10 fields. Furthermore, about half the fields should be turf while the other half should be natural grass.



USER & EVENT INTERVIEW SUMMARY (CONT.)



DEMAND & IDEAL AMENITIES FOR A NEW SPORTS FACILITY (CONT.)

MULTI-SPORT

- For outdoor programs, LOUYAA would like to have access to two (3) rectangular fields and three (3) ball fields with adjustable sizes while they would like to have access to three (3) basketball courts convertible to three (3) or more volleyball courts for indoor programs.
- i9Sports would like to see at least two (2) basketball courts at the proposed facility. Furthermore, they indicated the need for adjustable hoops that could be used for various age groups. For outdoor programs, they would like to have access to two (2) rectangular fields.
- GVAA indicated that their needs are met for outdoor space, but there is demand for more indoor space. The ideal facility for them would have five (5) basketball courts and up to five (5) turf fields for their programs.

OTHER SPORTS

- Frederick Freeze stated that there is a lack of ice availability in the region. Skate Frederick frequently turns away ice rental requests because they don't have any time, especially August through March. Their ideal additional hockey facility in Frederick would have two (2) NHL-sized ice sheets with locker rooms for players and referees.



USER & EVENT INTERVIEW SUMMARY (CONT.)



DEMAND & IDEAL AMENITIES FOR A NEW SPORTS FACILITY (CONT.)

OTHER SPORTS (CONT.)

- Frederick Rugby would use at least two (2) full-sized rectangular fields. They would also like to have rugby posts installed.
- A local bocce enthusiasts believes a covered or indoor 4-court bocce court would draw tournaments.

PICKLEBALL

- The USA Pickleball ambassador in Frederick felt that there is a need for at least 12 more outdoor dedicated pickleball courts in Frederick County. They added that there is demand for up to eight (8) indoor courts, although those could be on multi-use surfaces like a basketball court. USA Pickleball Baltimore Central Maryland stated that 12 indoor courts would ensure capturing local demand, but also be appealing for drawing regional tournaments. They also added that if the indoor courts are not dedicated pickleball courts, it could be a deterrent for hosting large events.

SOCCER

- FC Frederick indicated that they would use up to 12 soccer fields if available. They also stated that at minimum two (2) fields would need to be turf. Frederick Skyline C.F. would use at least four (4) to eight (8) fields.



USER GROUP & EVENT DEMAND SUMMARY: INDOOR SPORTS



Group/Organization	Sport	Likelihood of Usage	Type of Usage	Ideal # of Surfaces*	Number of Annual Events
Big Shots Basketball	Basketball	Definitely Use	Events	12	2
Crossover Hoops	Basketball	Would Not Use	-	-	-
FAST	Swimming	Definitely Use	Practices, Games, Events	1	6
Frederick Area Divers	Diving	Definitely Use	Practices, Games, Events	1	4
Frederick Freeze	Hockey	Definitely Use	Practices, Games, Events	2	1
Frederick Volleyball Club	Volleyball	Possibly Use	Events	6	2
GVAA	Basketball	Likely Use	Practices, Games	5	-
GVAA	Wrestling	Likely Use	Practices, Games	1	-
GVAA	Cheer	Likely Use	Practices, Games	1	-
i9 Sports	Basketball	Possibly Use	Practices, Games	2	-
i9 Sports	Volleyball	Possibly Use	Practices, Games	2	-
LOUYAA	Basketball	Definitely Use	Practices, Games	3	-
Maryland AAU	Basketball	Definitely Use	Events	8	5
Maryland Swimming	Swimming	Definitely Use	Events	1	2
Sertoma Basketball	Basketball	Definitely Use	Practices, Games	10	-
USA Baltimore Central Maryland	Pickleball	Definitely Use	Events	12	6
USA Pickleball Frederick	Pickleball	Definitely Use	Practices, Games	8	-

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Source: Victus research

Notes: Sorted by Group/Organization in alphabetical order. This is a representative sample of potential users, and the potential usage shown above is based solely on the interviewees contacted by Victus Advisors. (*) Surfaces are sport specific (courts, pools, ice sheets, etc.) according to Group/Organization.

Victus Advisors interviewed a representative sample of potential indoor sports facility users/events:

- All but one of the sports groups above expressed interest in using a new indoor sports facility in Frederick County.
- Usage ranged from weekday use for games and practices to weekend tournament event usage.
- Overall, we found initial interest for up to 28 annual tournaments/weekend events. These events ranged in terms of both the number of surfaces needed and the number of event days needed.



USER GROUP & EVENT DEMAND SUMMARY: OUTDOOR SPORTS



Group/Organization	Sport	Likelihood of Usage	Type of Usage	Ideal # of Surfaces*	Number of Annual Events
East Frederick Little League	Baseball	Definitely Use	Practices, Games, Events	4	3
FC Frederick	Soccer	Definitely Use	Practices, Games, Events	12	4
Frederick American Little League	Baseball	Definitely Use	Practices, Games, Events	4	1
Frederick County Girls Softball League	Softball	Definitely Use	Practices, Games, Events	4	4
Frederick Girls Softball	Softball	Likely Use	Events	4	2
Frederick National Little League	Baseball	Possibly Use	Practices	2	-
Frederick Rugby	Rugby	Likely Use	Practices, Games, Events	2	1
Frederick Skyline C.F.	Soccer	Definitely Use	Practices, Games, Events	8	4
i9 Sports	Football	Possibly Use	Practices, Games	2	-
i9 Sports	Soccer	Possibly Use	Practices, Games	2	-
LOUYAA	Field Hockey	Definitely Use	Practices, Games	2	-
LOUYAA	Lacrosse	Definitely Use	Practices, Games	2	-
LOUYAA	Soccer	Definitely Use	Practices, Games	2	-
Team Maryland Lacrosse	Lacrosse	Definitely Use	Practices, Games, Events	10	5
USA Pickleball Frederick	Pickleball	Definitely Use	Practices, Games	12	-

24

Source: Victus research

Notes: Sorted by Group/Organization in alphabetical order. This is a representative sample of potential users, and the potential usage shown above is based solely on the interviewees contacted by Victus Advisors. (*) Surfaces are sport specific (softball fields, soccer fields, etc.) according to Group/Organization.

Victus Advisors interviewed a representative sample of potential outdoor sports facility users/events:

- All of the sports groups above expressed interest in using a new outdoor sports facility in Frederick County.
- Usage ranged from weekday use for games and practices to weekend tournament event usage.
- Overall, we found initial interest for up to 24 annual tournaments/weekend events. These events ranged in terms of both the number of surfaces needed and the number of event days needed.



7. SPORTS FACILITY OPPORTUNITY ASSESSMENT



SUMMARY OF KEY TAKEAWAYS

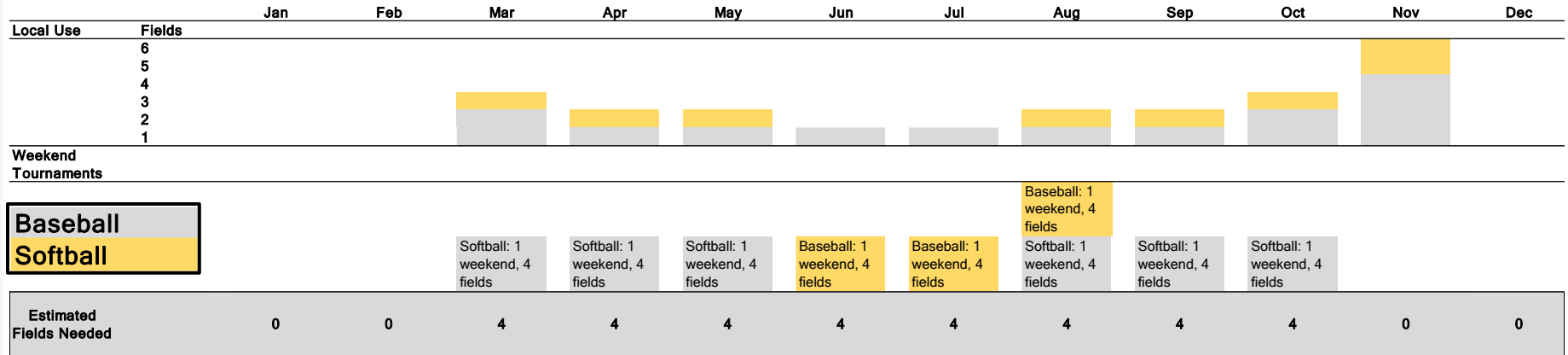


Key takeaways from the market research presented thus far in this report include:

- **Ball Fields:** There are numerous ball fields found throughout Frederick County. It should be noted however, that there is only one (1) baseball complex with at least five (5) fields, and two (2) softball field complexes with at least five (5) fields.
- **Competitive Pool:** There is no indoor 50-meter competitive pool in Frederick County.
- **Indoor Court Space:** There is no indoor sports facility with more than one (1) multi-use court.
- **Rectangular Fields:** There are numerous multi-use rectangular fields found throughout Frederick County, however just three (3) have 5+ fields, with eight (8) fields being the largest.
- **Facility Support:** Generally speaking, stakeholders were very supportive of proposed Maryland Sports & Learning Campus.
- **Potential Partnership:** The school district is interested in having discussions about a shared facility for aquatics and for indoor track.
- **Indoor Sports Demand:** All but one of the indoor sports groups interviewed expressed interest in using a new indoor sports facility in Frederick County. Furthermore, we found initial interest for up to 28 annual tournaments/weekend events.
- **Outdoor Sports Demand:** All of the outdoor sports groups expressed interest in using a new outdoor sports facility in Frederick County. Furthermore, we found initial interest for up to 24 annual tournaments/weekend events.



ESTIMATED UNMET DEMAND & USAGE CALENDAR: BALL DIAMONDS



Source: Victus research

ESTIMATED USAGE PATTERNS

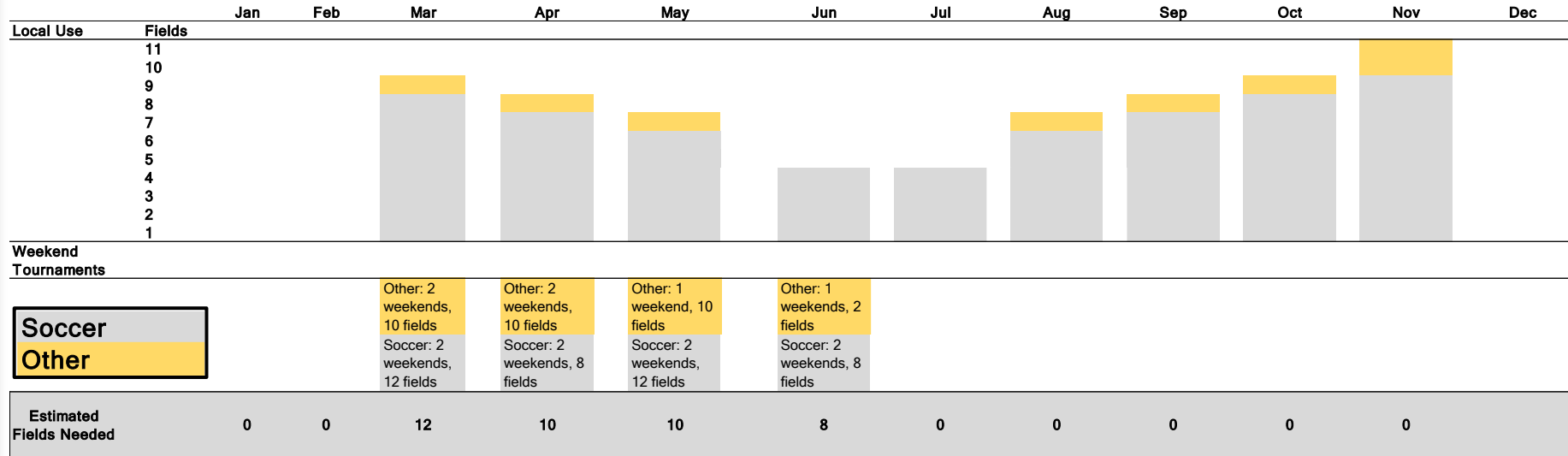
Estimated usage of ball diamonds would be consistent for practices, games, and tournaments between March and November.

NEW FACILITY DEMAND

Victus estimates that a tournament-caliber 4-plex baseball/softball complex would be able to capture the vast majority of excess local and tournament usage in the spring, summer, and fall. If possible, it may be worthwhile to consider expansion of an existing 4+ field diamond complex, in order to create a larger, tournament-caliber baseball/softball facility.



ESTIMATED UNMET DEMAND & USAGE CALENDAR: RECTANGULAR FIELDS



Source: Victus research

ESTIMATED USAGE PATTERNS

Estimated usage of rectangular fields peaks during the spring and the fall. Weekend tournament usage would be highest between March and early summer.

NEW FACILITY DEMAND

Victus estimates that a 10-field complex would be able to capture the vast majority of local and tournament usage year-round for soccer and other user groups.



OTHER SPORTS DEMAND



- **Swimming & Diving:** In addition to the school district's interest in a shared-use competitive pool, Monocacy Aquatic Club and Maryland Swimming also believe the community needs a 50-meter, 8-lane competitive pool. Additional requested features and amenities include warm-up and warm-down pools, bleacher seating for up to 1,500 spectators, office and flex room space, locker rooms, and a weight room. Frederick Area Divers would like to see an aquatic facility that had a separate dive well with diving boards. They would also recommend diving platforms and dry land training space that includes trampolines and dry boards.
- **Indoor Track:** The Frederick County School District interviewee felt that if there was an indoor track in Frederick County, it would attract visitors from Western Maryland, Howard County, Montgomery County, and Carroll County, at minimum. They stated that there just aren't enough facilities and venues for indoor track programs locally to train.
- **Pickleball:** There is demand for a dedicated indoor pickleball facility with at least eight (8) courts. That said, some of pickleball demand could also be accommodated through a multi-use indoor facility with pickleball capabilities.



CONTACT INFORMATION



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