



North Idaho State Fair Master Plan
Kootenai County Fairgrounds
Coeur d'Alene, Idaho April 2024

Prepared for:
North Idaho State Fair Board
Coeur d'Alene, Idaho

Prepared by:
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Consultant Team



Master Planning Consultant Team:



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Planning Participants



North Idaho State Fair Members who should be recognized for laying the groundwork to make the fairgrounds master plan possible:

North Idaho State Fair Board of Directors

Gerald Johnson, Chair
Elise Burton, Vice Chair
Joe Doellefeld
Kevin Kirking
Sharon Nelson
Linda Rider
Timothy Vulles

Fair Board Alternates

Todd Feusier
Mike Mclean
Christina Petit

North Idaho State Fair Staff

Alexcia Jordan, Fair General Manager

Executive Summary

purpose

In the summer of 2020 K/O Fairground Planners were commissioned by the North Idaho State Fair Board of Directors to prepare a Master Plan for the North Idaho State Fair at the Kootenai County Fairgrounds, located in Coeur d'Alene, Idaho. The purpose of the study is to explore the many potential possibilities in re-organizing the fairgrounds at its current location. Furthermore, the study is to guide the future development of the fairgrounds extending into the next 10+ years. This plan lays the groundwork for continuing the tradition of the North Idaho State Fair, while enhancing its current lines of business to include showcasing and promoting agriculture, commerce, technology and culture. The fairground master plan and the many facility upgrades recommended focus on improvements to create a first-class venue for a successful community and regional celebration.

process

The study began by conducting a review of the existing facilities at the existing fairgrounds to account for the present-day amenities. Concurrently, Market Demand Analysis data was compiled to understand what the competitive and event potential was for the region. Once these efforts were finished, several recommendations were made and from those – programming and planning objectives defined. These objectives set the groundwork which helped create the Draft master plan ideas. As the ideas were narrowed down, the Final Plan started to take shape. Upon further edits, discussions, and clarifications, the Final Master Plan document with probable budget figures and phasing was complete.

conditions of study

This Master Plan Report is to be used only for the planning of improved facilities at the Kootenai County Fairgrounds, located in Coeur d'Alene, Idaho. It is not to be used for any other purpose. The North Idaho State Fair Board retains sole ownership of this document, which shall not be reproduced without written consent. All copyrights to material contained herein are held by K/O Fairground Planners and Crossroads Consulting and shall not be released in whole or part for publication or otherwise without giving full credit to K/O Fairground Planners and/or Crossroads Consulting. Although we believe the information herein to be correct, we cannot be responsible for variations that occur due to future events beyond our control, which cannot be anticipated under the limitations of this document.

site visit & meetings

Our initial visit to Coeur d'Alene was in August 2021 to attend the annual fair and examine the existing fairgrounds and its facilities. During this visit K/O interviewed many individuals, and key stakeholders. Our second visit to Coeur d'Alene was in January of 2022, to meet with planning committee members to discuss our Market Findings and narrow down our Site Concepts. Our third visit was in August 2022. During this visit K/O again interviewed many individuals, and key stakeholders while also witnessing in person the fair and its many activities.

Executive Summary

site use concept design process

Site constraining variables along with basic circulation diagrams and patterns are considered when initially studying the location of buildings and amenities and the potential placement of any new programming items on a fairgrounds site. The following planning principles and site constraints were considered when creating the Master Plan:

planning principles adhered to

- Health and Safety of Patrons and Animals.
- Strong Identity.
- Consistency in all aspects.
- Sustainability and Resource Reuse.

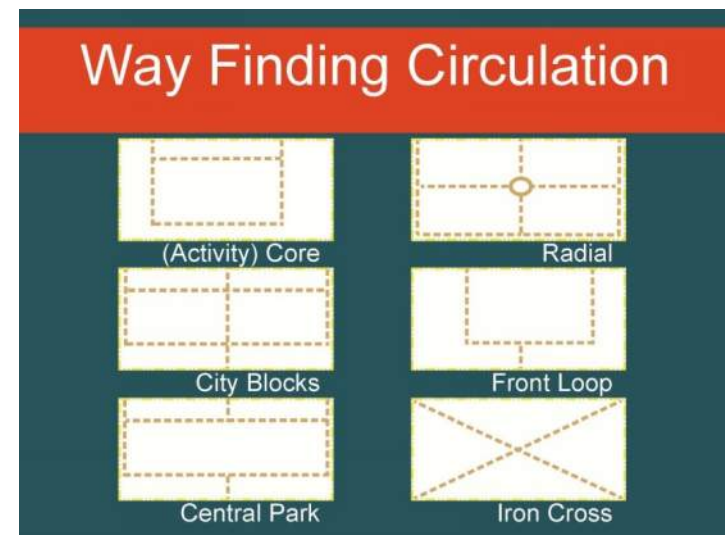
site constraints

- Kootenai County Sheriff's Office to the north.
- Kathleen Avenue to the south.
- Fire Station in the southeastern corner.
- Coeur d'Alene High School campus to the east.
- North Government Way to the west.

goals of the site organizing principles

- Locate complimentary facilities near each other.
- Locate consolidation of functions in identifiable zones.
- Locate facilities to work with existing infrastructure.
- Major gateways should provide visual guidance of the above and be easily identifiable.
- Clean simple sitewide circulation.
- Create visual continuity and appeal among all site elements.

Existing Conditions, Existing Use Zones, Building Heat Map and Site Heat Map diagrams are included after this section.



North Idaho Fairgrounds

Coeur d'Alene, Idaho

Existing Conditions

- Vendors/Office
- Vendors
- 4H/Plant Exhibits
- Stampede Room
- Maintenance
- Wildlife Center
- Vendors
- Arts/Crafts
- Alpaca Barn
- Bugology & Bees
- Poultry Barn
- Rabbit Barn
- 4H Office
- Grandstand & Arena
- Draft Horse Barn
- Goat Barn
- Art Gallery
- Restrooms
- Home Arts
- Main Food Court
- Farm Park Pavilion
- Cattle Barn
- Midway
- First Aid Building
- Jacklin Building
- Horse Barn
- Outdoor Arena
- North Area & Barns
- Parking
- Campground

Entrance
Fair Boundary
 North

K/O Fairground Planners www.k-o.com

Government Way

Dalton Ave

Kathleen Ave

Arena

Main

B

B1

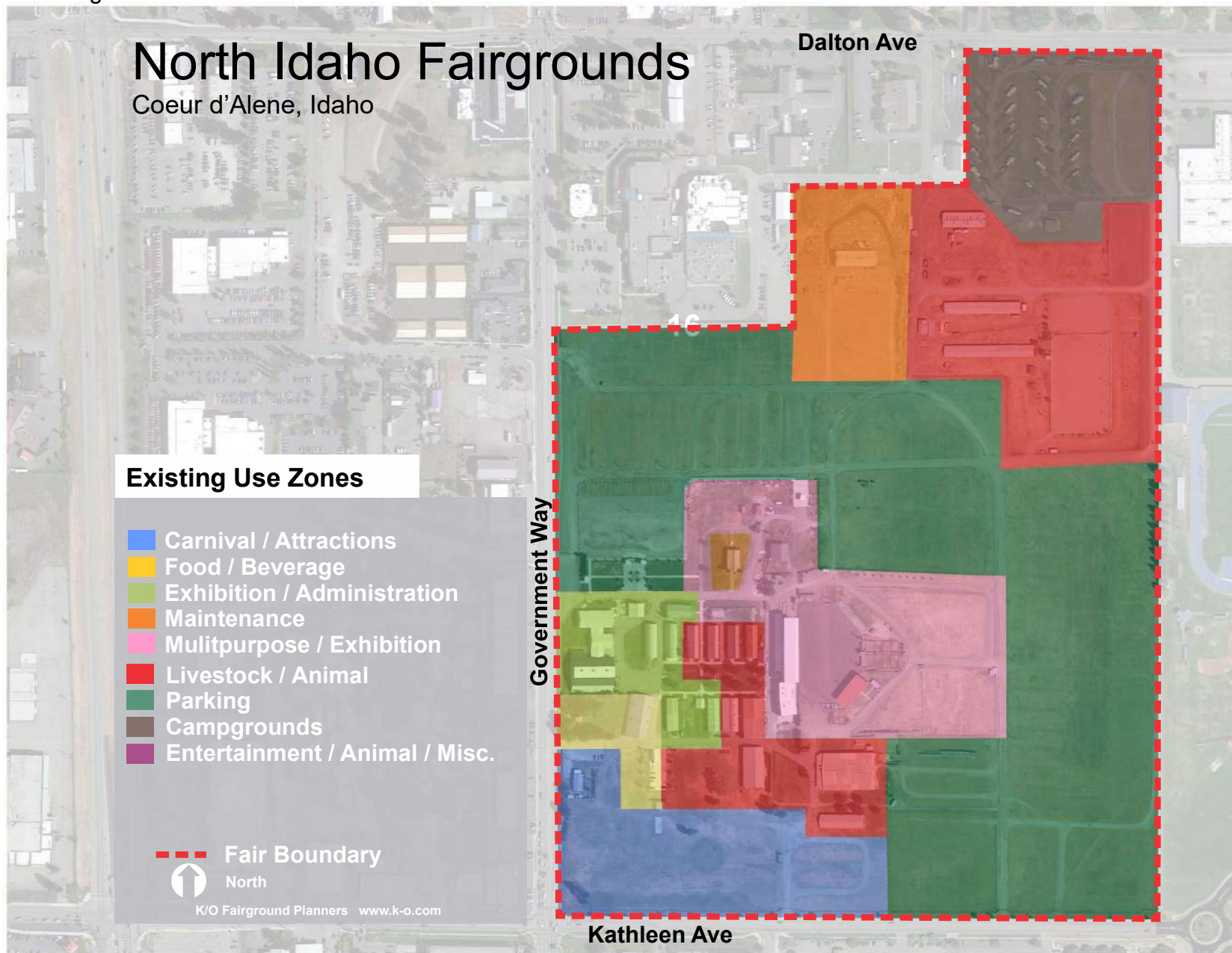
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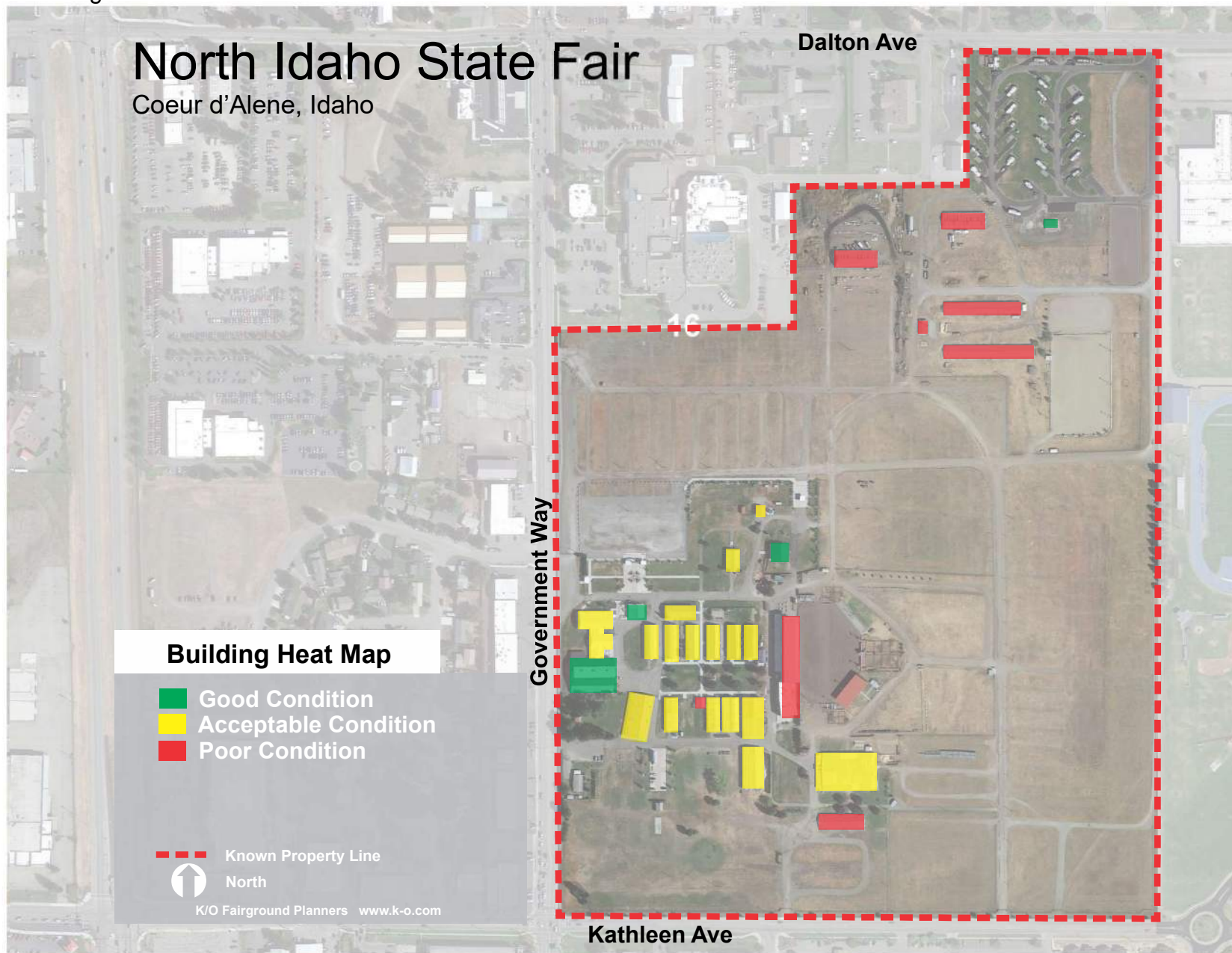
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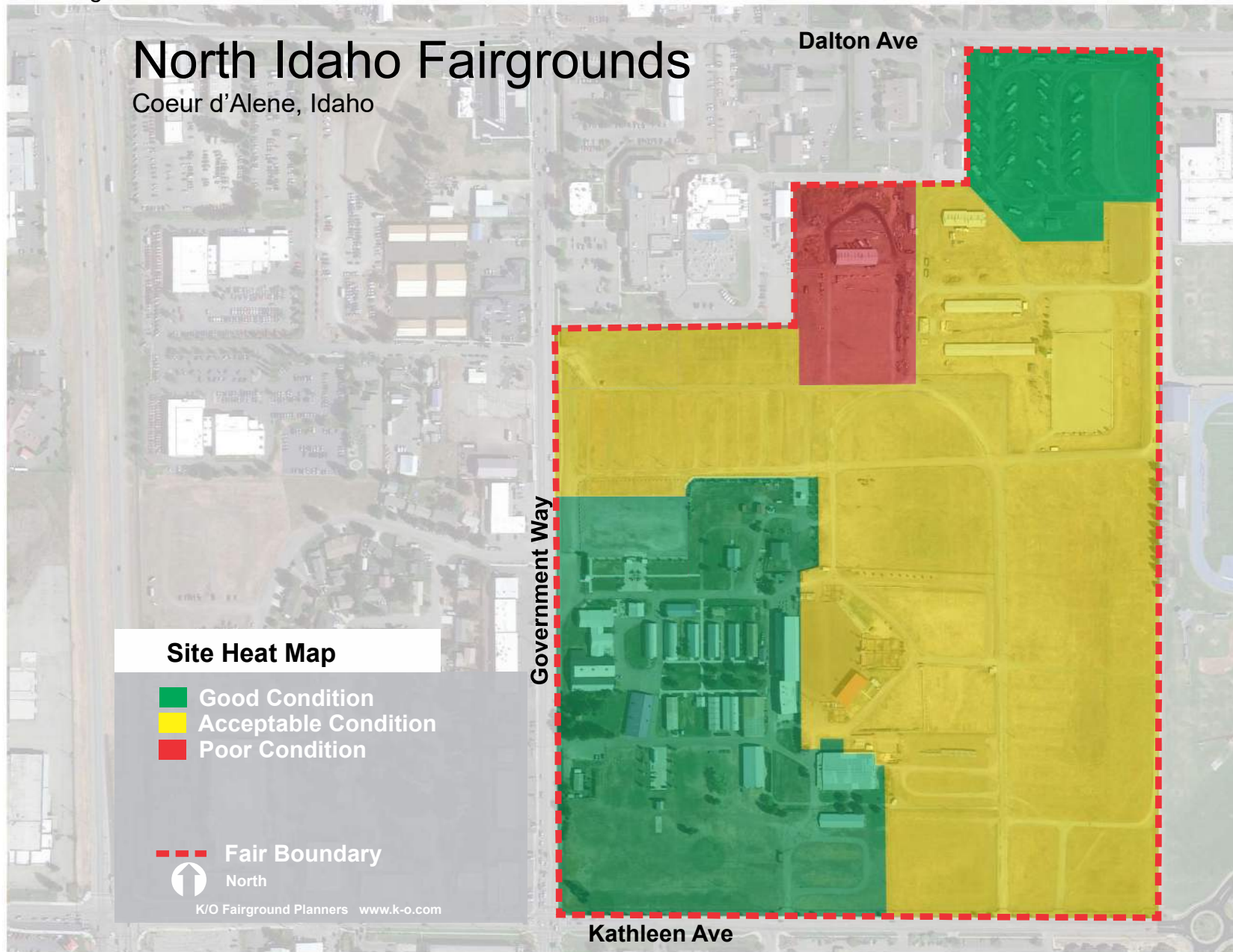
Existing Conditions



Existing Conditions



Existing Conditions



Existing Facilities

1. Building 1 - Commercial Vendors

The barrel roofed building contains vendor areas totaling 9,600 square feet (sf). Playfully advertising the fairgrounds with a western side mural, the building is handicapped accessible with a concrete floor and needs repairs and updates to become a useable off-season event space.



2. Building 2 - Commercial Vendors

Building 2 also houses commercial vendor areas containing 2,400 sf, that is equipped with concrete floors, metal siding and a gable roof. The building is found in good condition but should still have numerous upgrades if it is to maintain its current use.



Existing Facilities

3. Building 3 - 4H

The 4H building contains 5,000 sf of exhibit space equipped with metal roofing and siding with a concrete floor. Found in good condition, the building along with buildings 1 and 2, showcase large, playful murals advertising the fairgrounds on its west side. This building also like buildings 1 and 2 will need significant upgrades if it is to be kept as a useable facility on the grounds.



4. Building 4 - Coors Banquet Stampede Room

The Coors Banquet Stampede Room is a gable roofed structure containing 1,600 sf that is equipped with concrete floor surfaces, restrooms, numerous windows and doors with metal siding and roofing and is found in good condition.



Existing Facilities

5. Building 5 - Maintenance Building

The Maintenance Building is a gable roofed structure containing 2,160 sf, that is equipped with 2 overhead doors and 1 walk-thru door, metal siding and roofing and is found in good condition. The building will need code and repair updates. The maintenance building in the maintenance yard to the north of the property (not pictured) should be replaced as money becomes available.



6. Wildlife Building

The Wildlife Building is a gable roofed, metal building containing approx. 2,500 sf of exhibit space. The structure is found to be in good condition with concrete floors, 2 overhead doors, 1 double and 1 single walk-thru door. Several upgrades would be needed if the building is intended to be left intact.



Existing Facilities

7. Building 7 - Vendor Building

Building 7 is a Quonset hut metal structure containing 3,600 sf, that is equipped with asphalt floors. Its poor conditional rating is due to a leaking roof.



8. Building 8 - Arts/Crafts Building

The Arts & Crafts Barn is also a Quonset hut metal structure containing approx. 3,900 sf, also equipped with asphalt floors, and is found in good condition.



Existing Facilities

9. Building 9 - Alpaca Barn

The Alpaca Barn is a gable roofed, metal structure containing approximately 2,900 sf, that is equipped with dirt surfaces with adjacent fenced-in areas and is found in good condition, with many possible upgrades required.



10. Building 10 - Bugology & Bees

The Bugology & Bees Barn is a gable roofed structure containing approx. 2,900 sf, that is equipped with dirt surfaces, metal siding and roofing and is found in good condition and like building 9 will need updates in the near future.



Existing Facilities

11. Building 11 - Poultry Barn

The Poultry Barn is a gable roofed structure similar to Building 10 containing approximately 2,900 sf, that is also equipped with dirt surfaces, metal siding and roofing and is found in good condition. This structure like buildings 9, 10, and 12 will need electrical and code upgrades to be used as a year-round multi-purpose structure.



12. Building 12 - Rabbit Barn

The Rabbit Barn is a gable roofed structure containing approx. 2,900 sf, that is equipped with dirt surfaces, metal siding and roofing and is found in good condition. With standard upgrades as mentioned on prior buildings to stay viable.



Existing Facilities

13. Building 13 - 4H Office

Used as the 4-H office during the fair and box office during arena fairground-hosted events, the small structure appears in good condition – this should not preclude the decision to relocate it if the plan requires.



14. Building 14 - Grandstand & Findlay Arena

The main Grandstand, along with the metal bleachers and box seats have a total capacity of 2,919 spectators. Containing asphalt floors and wood structural elements, the building is found in marginal condition and should be extensively upgraded or replaced.

Findlay Arena contains approximately 48,000 sf (1.1 acres) of dirt arena space.



Existing Facilities

15. Building 15 - Draft Horse Barn

The Draft Horse Barn is a gable roofed, wood framed structure encompassing 7,200 sf, containing a dirt floor with metal siding and roofing, and is found in good condition.



16. Building 16 - Goat Barn

The Goat Barn is another Quonset hut structure containing 3,500 sf, with an additional lean-to. The barn contains dirt surfaces and metal siding and roofing and is found in acceptable condition.



Existing Facilities

17. Building 17 - Art Gallery

Containing 3,000 sf, the Arts Gallery is a gable roofed metal structure with concrete floors. Code updates and electrical enhancements are needed.



18. Building 18 – Restrooms

The restroom building contains 750 sf, equipped with concrete floors housing 7 stalls on the women's and men's sides. The metal sided structure is found in an acceptable condition.



Existing Facilities

19. Building 19 - Home Arts Building

The Quilts/Sewing building is a gable roofed, metal structure containing approx. 3,000 sf with carpeted flooring, heating and ceiling fans. The building is in good condition.



20. Building 20 - Main Food Court

Containing 3,360 sf, the Food Court Building provides good shelter for food preparation and consumption and is found to be in good condition with a metal roof and metal siding.



Existing Facilities

21. Building 21 – Farm Park Pavilion

The Farm Park Pavilion is a new gable roofed, open structure also containing 2,500 sf, that is equipped with a wood structure, concrete surfaces, and metal roofing and is found in good condition.



22. Building 22 - Cattle Barn

The Cattle Barn is a gable roofed, open structure containing 7,200 sf, that is equipped with dirt surfaces, metal siding and roofing and is found in need of several repairs.



Existing Facilities

23. Midway

The midway carnival area of the grounds is located in the far southwest corner of the fairgrounds. Totalling approximately five acres, the area is mostly turf and found to generally be in good condition. Due to the vegetative nature of this parcel continued grounds maintenance will be required for upkeep of this land.



24. Building 24 - First Aid Building

The First Aid Building is a small wooden structure and is portable in nature. This building is found in acceptable condition for how it is used. Ideally the program of this building could be housed in a more permanent structure.



Existing Facilities

25. Building 25 - Jacklin Building

The Jacklin Building is one of the largest structures on site, containing 16,500 sf. The metal sided and mural painted structure contains concrete surfaces. Multiple upgrades will be needed if this building is to be kept. Due to its location and use it is a good candidate for replacement or extensive enhancements.



26. Building 26 – Horse Barn

Building 26 is an open-sided structure containing 5,200 sf. It has metal siding and a compact gravel floor. This building is found to be in marginal condition and should be considered for replacement.



Existing Facilities

27. Outdoor Arena

The outdoor arena is 180' x 300' containing approximately 54,000 sf (1.25 acres). The arena is found in good condition but due to its locations might want to be relocated.



28. North Area & Barns

The northeast corner of the fairgrounds contains the previously mentioned arena, along with a smaller practice arena. Additionally, 100 9'x9' equestrian stalls are located throughout four structures. Restrooms with showers and a concession building are also located in this area. All of these buildings are in poor condition and should be either removed or replaced if their function is needed to support events.



Existing Facilities

29. Parking Areas

The parking areas throughout the fairgrounds are a mixture of secured, fenced-in gravel lots as well as open, grass areas that are used throughout the year. Consideration should be given to making improvements and paving these areas as deemed appropriate.



30. Campground

The new campgrounds, found in the far northeast corner of the fairgrounds, has 26 camping spots equipped with modern electrical and water hook-ups. This is a new campground and contains a bathroom/shower building on the south side of the site.



Model Program

The goal of the Master Plan is to operate a successful events center year-round. Most of the infrastructure necessary to achieve this currently exists. While some items on site will remain and some will be enhanced or added to, most items are entirely new facilities. Ultimately, regardless of the condition of the existing facilities our study shows the following updates are required to implement all the items of the Master Plan. Please review the complete Market Analysis included at the end of this document for more details as to how these recommendations were arrived at. A high-level list of these suggestions are as follows:

North Idaho State Fair Model Program K/O Fairground Planners November 21, 2021

- Remodel refresh all facilities to remain on grounds
- Improve circulation and wayfinding
- Create new toilet facilities on areas of grounds without new buildings
 - (new buildings to include toilets)
- Add green space – increase shade and park like setting
- Add Plaza areas at major nodes and intersections
 - Create back-of-house perimeter loop access road around inside fence line of grounds
- Create new entry gate image at major entry points to grounds
- Clean-up and consolidate maintenance area
 - Consider new building or major improvements to existing building
- Increase the number of and size of horse stalls
 - Stalls should be at least 12' x 12'
 - Provide for access to Event Center and outdoor arenas
 - Remove old horse stall buildings
 - Add RV hook-ups near relocated horse stalls
- Consolidate Buildings 1, 2, and 3 into a single flat floor expo space
 - Approximately 20,000 SF

Model Program

Consolidate Draft Horse Barn and Cattle Barn into a 30,000 SF single multi-use Livestock Barn

- Include portable stalls that can be reconfigured for all type of livestock

- Include judging area, wash racks, storage, drive-thru access, toilets, etc.

Increase size of existing RV Park by about 16 full service spots

Option A - Develop a 115,000 SF minimum Event Center with a minimum of 6,000 retractable seats

- Column-free, concrete floor with the ability to bring in dirt

- Should be multi-purpose and divisible

- Retractable or bleacher seating

- Other supporting amenities such as meeting rooms, storage, kitchen, pre-function, VIP areas, toilets, show office, etc.

Option B - The following outlines an alternative option to developing the event center described above:

- Increase Grandstand bleacher seating at arena to a minimum of 6,000

- Develop column-free exhibit space of 25,000 SF

- Could be new construction or expansion of an existing facility

- Should be climate-controlled and divisible

- Other supporting amenities such as meeting room, storage, kitchen, toilets, show office, etc.

Program Concepts

The following 8 pages are Program Overlay graphics showing possible site layouts containing items from the model program. Each Program Overlay has its own unique layout, organized with a grid format, oval central grounds, or swooping arches.

From these program overlays a Draft Master Plan was created. Page 35 is the Draft Master Plan from July of 2022.

Continued input from users led to changes and refinements creating the Final Master Plan, as seen on page 36.

Page 37 is a 3D Aerial Rendering of the site showing the full potential of the built out completed Master Plan.

Pages 38 - 40 show three Proposed Building Layouts.

North Idaho State Fair

Coeur d'Alene, Idaho

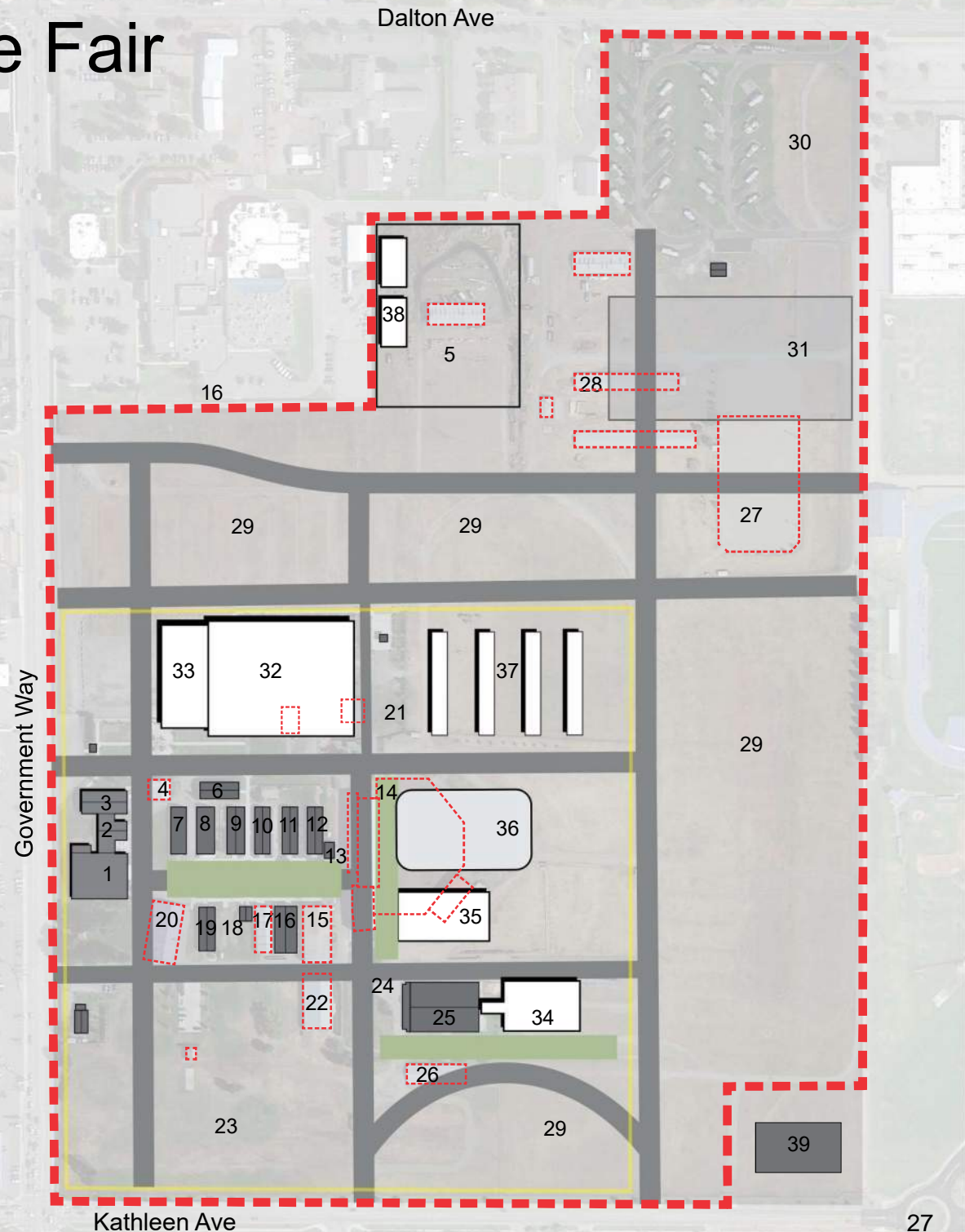
Program Overlay 1

- 1 Building 1 - Vendors/Office
- 2 Building 2 - Vendors
- 3 Building 3 - 4H/Plant Exhibits
- 4 Stampede Room
- 5 Maintenance
- 6 Wildlife Center
- 7 Vendors
- 8 Arts/Crafts
- 9 Alpaca Barn
- 10 Grange
- 11 Poultry Barn
- 12 Rabbit Barn
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- 30 Campground
- 31 Expanded Campground
- 32 New Indoor Arena
- 33 New Admin/Extension Office
- 34 New Expo Hall
- 35 New Livestock Building
- 36 New Outdoor Arena
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- 39 Fire Station

--- Known Property Line



North



North Idaho State Fair

Coeur d'Alene, Idaho

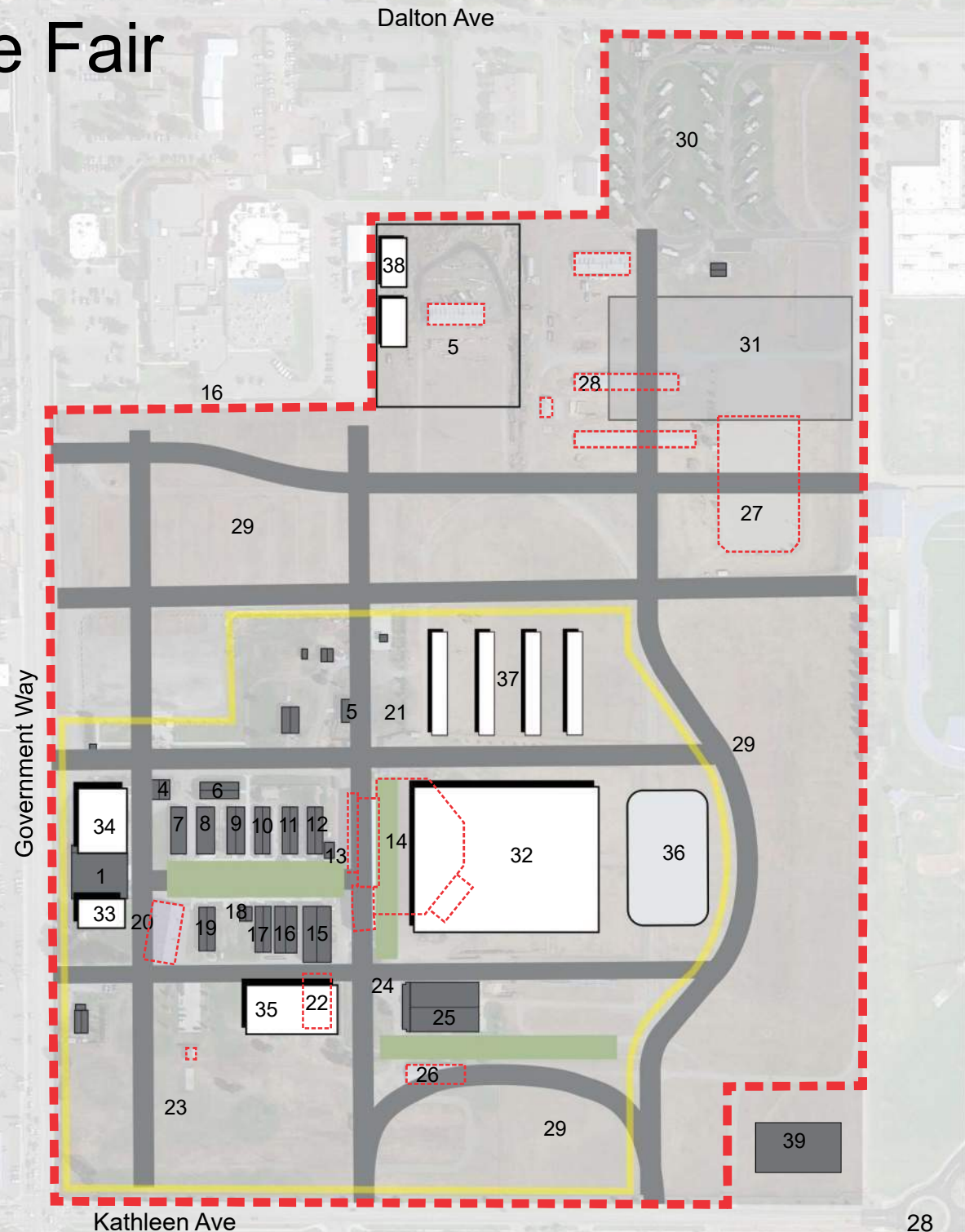
Program Overlay 2

- 1 Building 1 - Vendors/Office
- 2 Building 2 - Vendors
- 3 Building 3 - 4H/Plant Exhibits
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North Idaho State Fair

Coeur d'Alene, Idaho

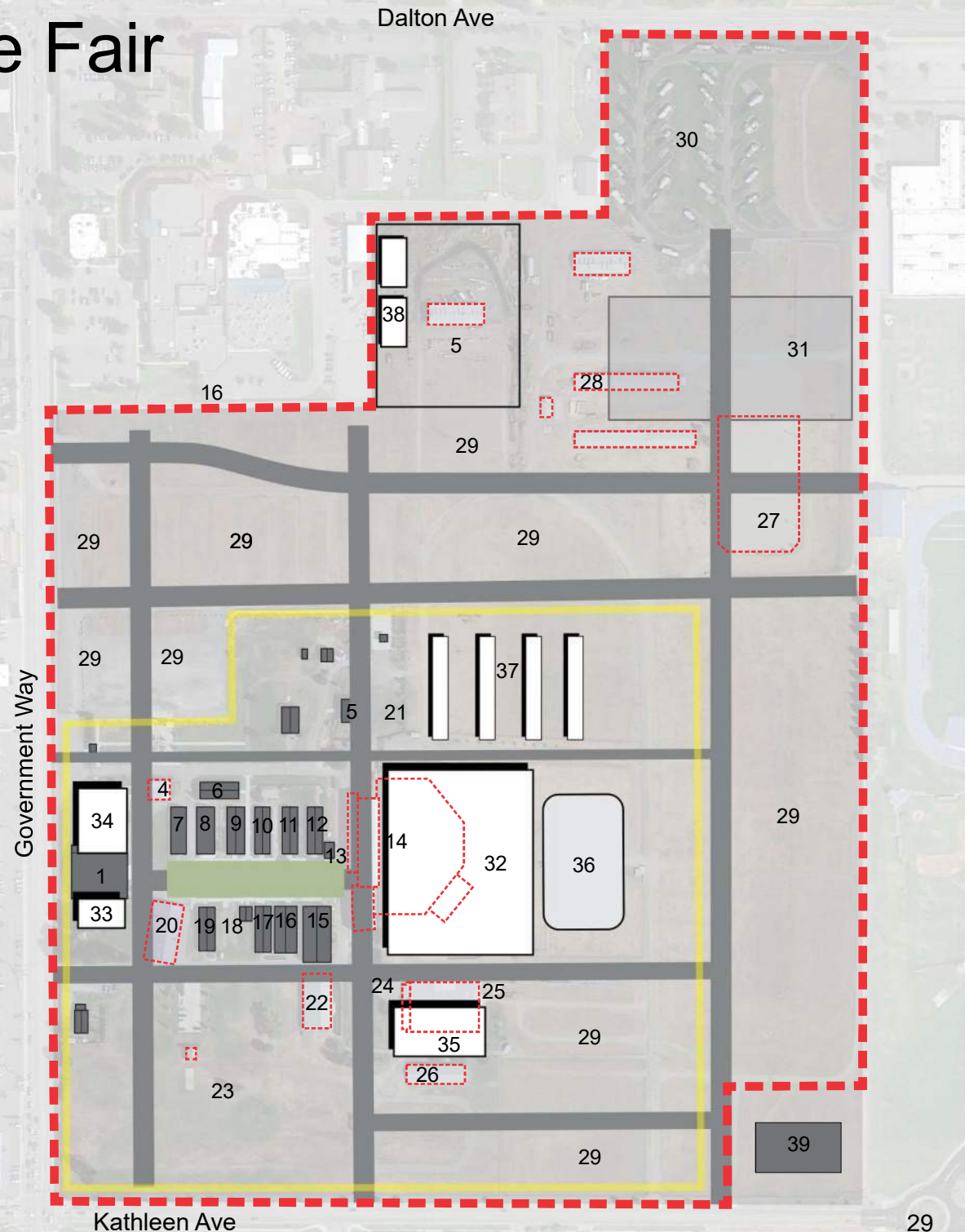
Program Overlay 3

- 1 Building 1 - Vendors/Office
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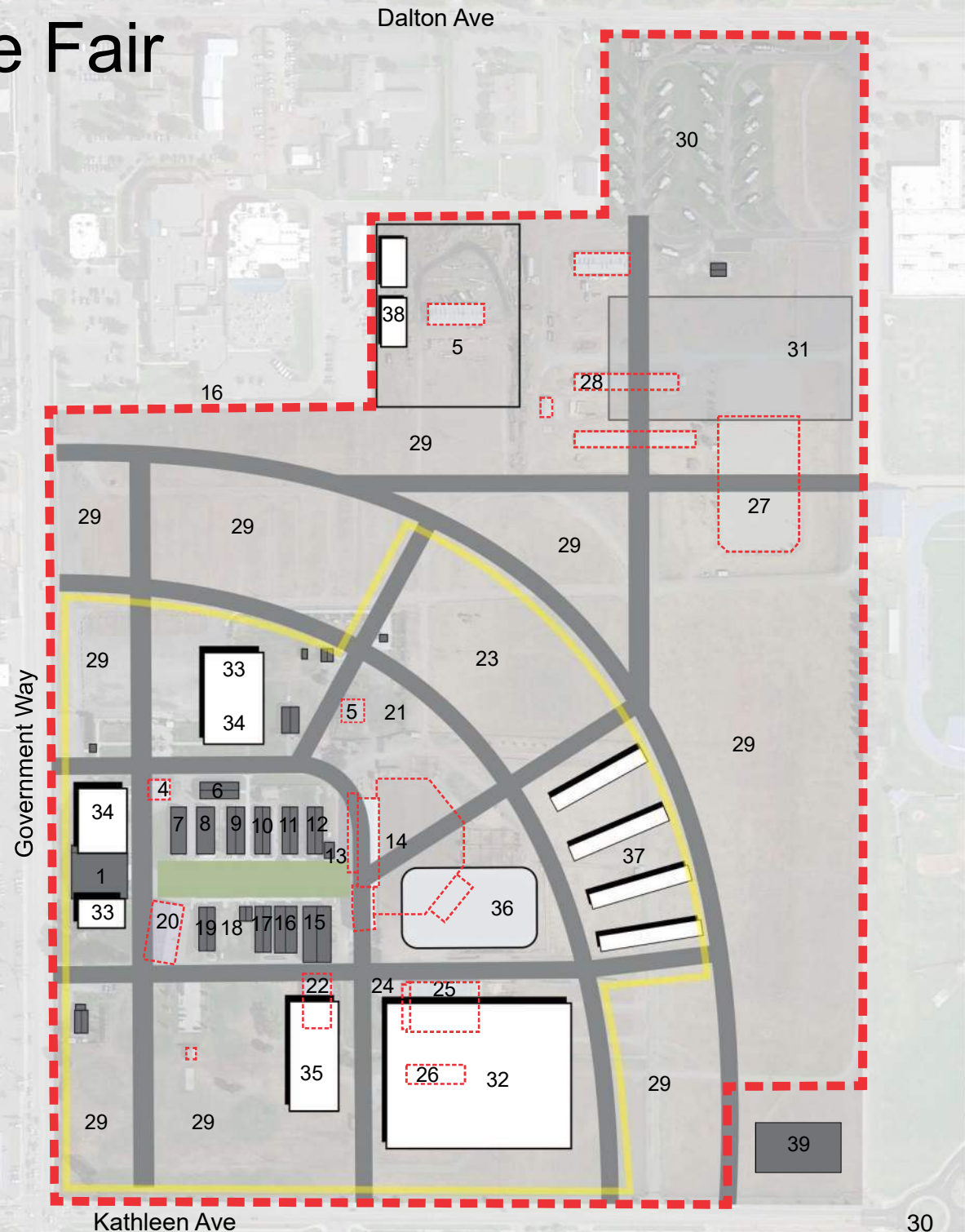
Program Overlay 4

- 1 Building 1 - Vendors/Office
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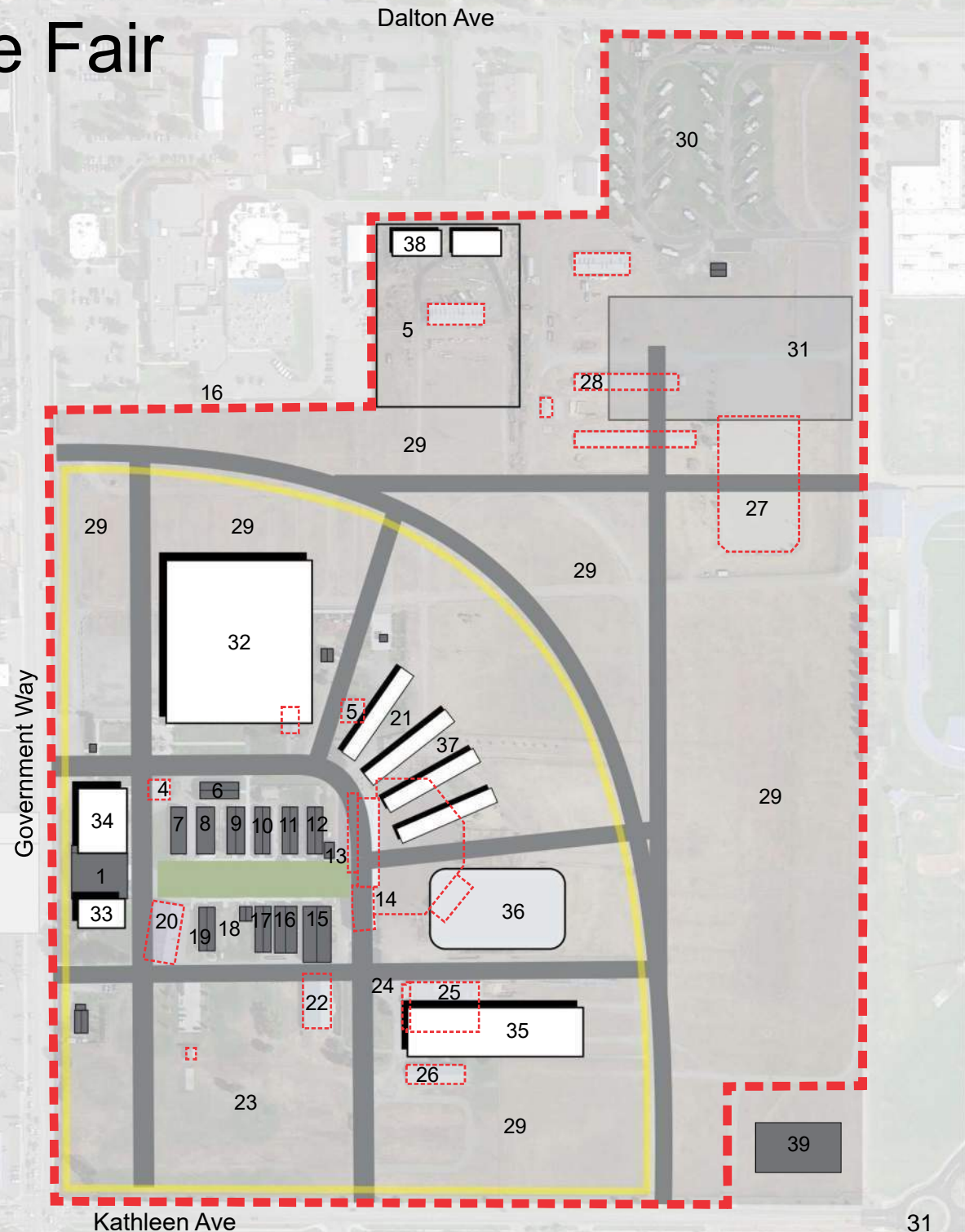
Program Overlay 5

- 1 Building 1 - Vendors/Office
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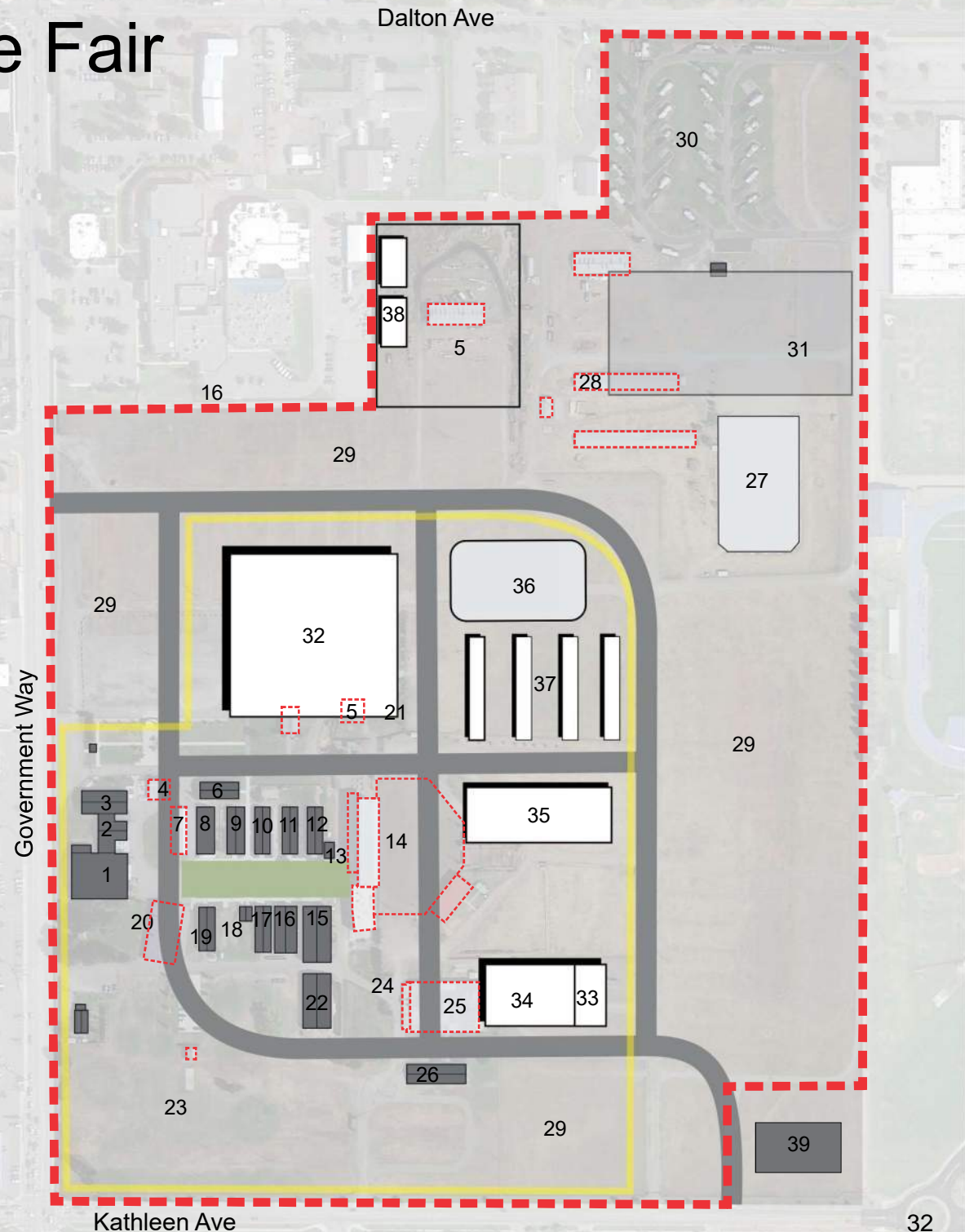
Program Overlay 6

- 1 Building 1 - Vendors/Office
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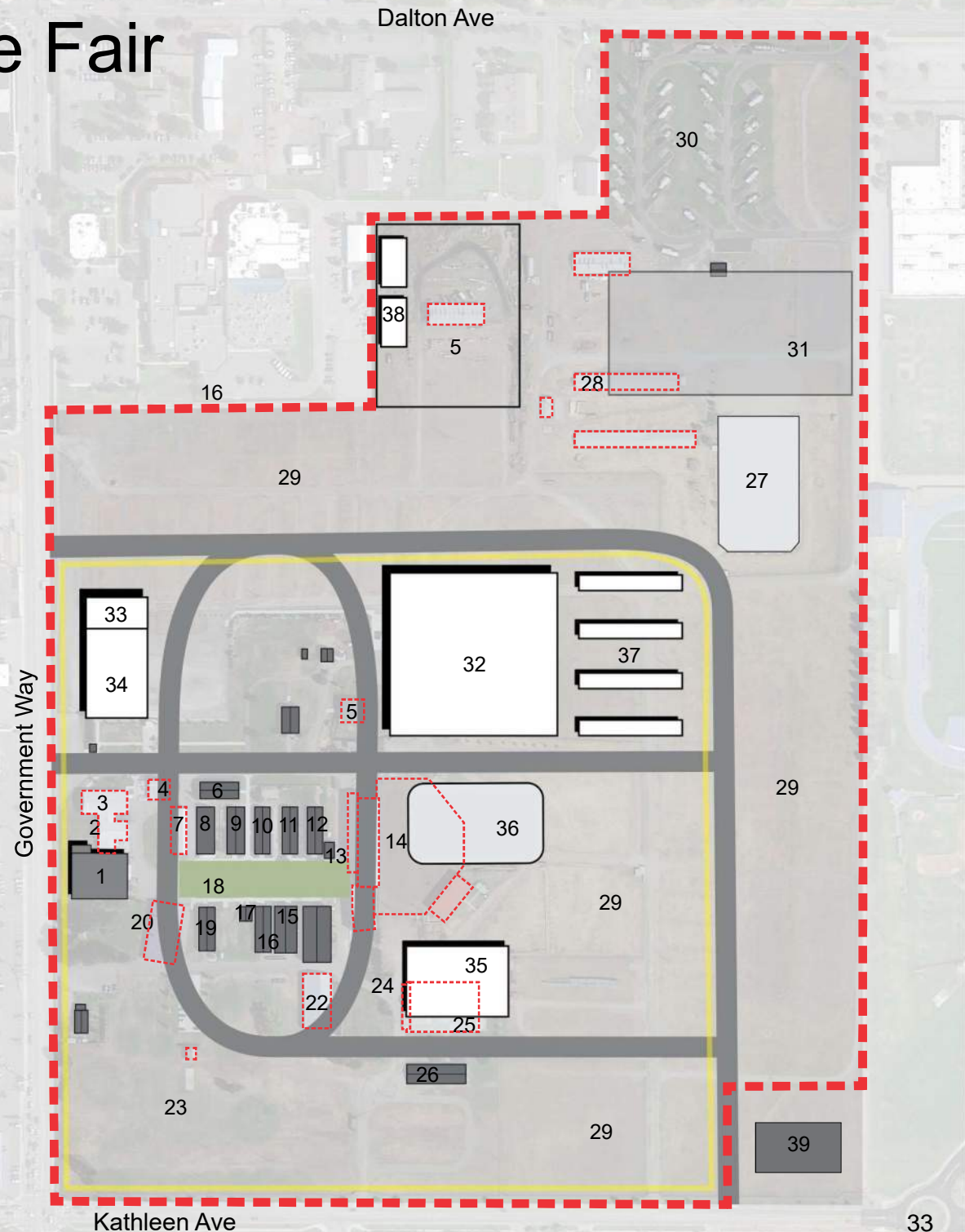
Program Overlay 7

- 1 Building 1 - Vendors/Office
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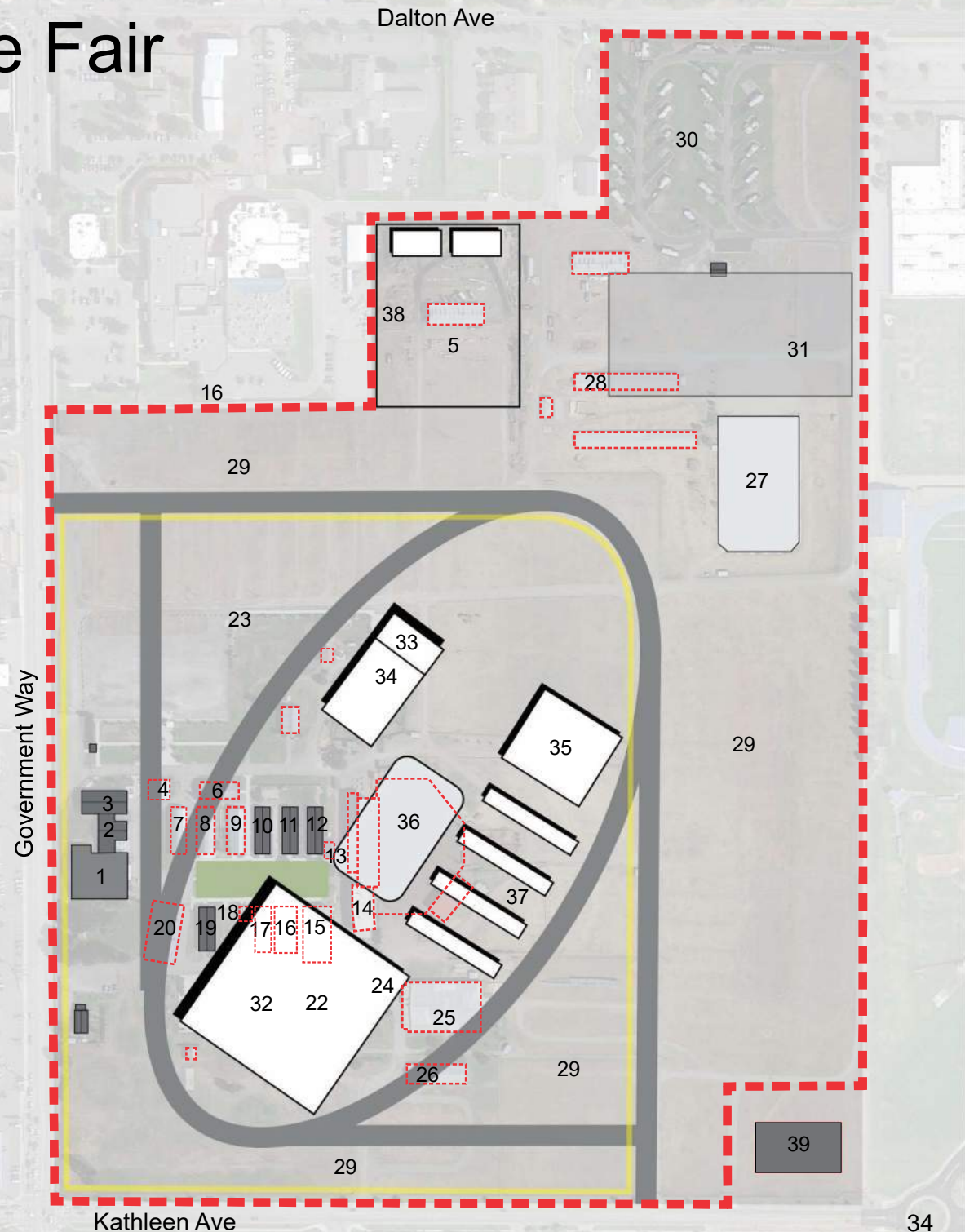
Program Overlay 8

- 1 Building 1 - Vendors/Office
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Coeur d'Alene, Idaho

Draft Master Plan 07/20/2022

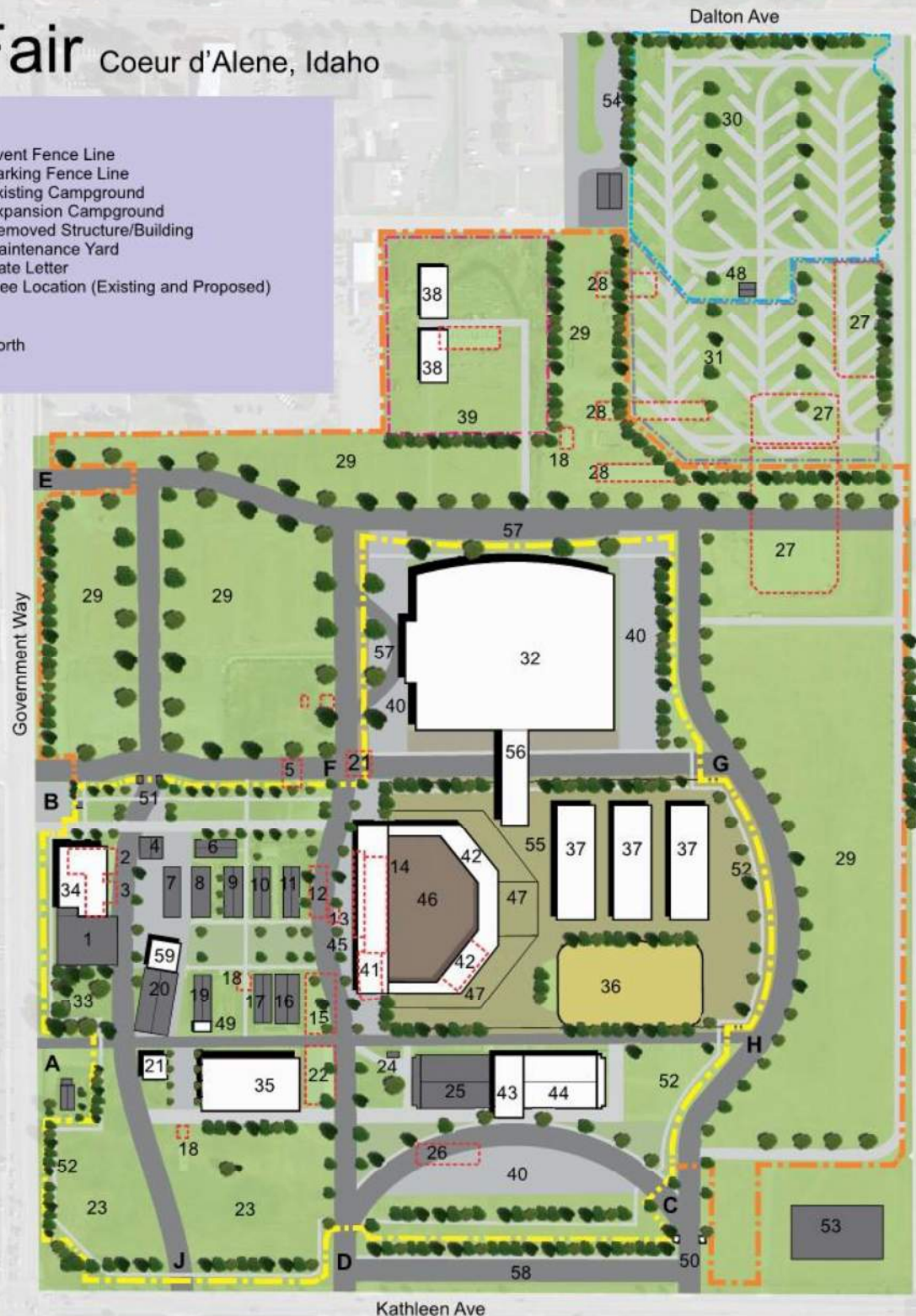
- 1 Renovate Building 1 - Vendors
- 2 Remove Building 2 - Vendors
- 3 Remove Building 3 - 4H/Plant Exhibits
- 4 Stampede Room
- 5 Remove Maintenance Building
- 6 Wildlife Center
- 7 Vendor Building
- 8 Arts/Crafts Building
- 9 Alpaca Barn
- 10 Grange Building
- 11 Poultry Barn
- 12 Remove Rabbit Barn
- 13 Remove 4H Office
- 14 Remove Existing Grandstand
- 15 Remove Draft Horse Barn
- 16 Goat Barn
- 17 Art Gallery Building
- 18 Remove Restrooms
- 19 Remodel Home Arts
- 20 Remodel Food Court Building
- 21 Remove/Relocate Farm Park Pavilion
- 22 Remove Cattle Barn
- 23 Carnival/Park Area
- 24 First Aid Building
- 25 Remodel Jacklin Building
- 26 Remove Horse Stall Barn
- 27 Remove Outdoor Arenas
- 28 Remove North Area & Barns
- 29 Parking
- 30 Existing Campground (approx. 36 Hook-ups)
- 31 Expanded Campground (32 Hook-ups)
- 32 New Indoor Arena/Multipurpose Building
- 33 Storage Building/Park
- 34 New Expo Hall
- 35 New Livestock Building
- 36 New Outdoor Arena
- 37 New Multi-Purpose Stalling Barns
- 38 Remove/Replace Maintenance Buildings
- 39 Maintenance Yard - Fenced
- 40 Paved Parking
- 41 New Grandstand with Concessions and Club
- 42 New Seating/VIP Areas over stock pens
- 43 New Administration/Extension/4H Offices
- 44 New Multi-Purpose Building
- 45 New Grandstand Plaza
- 46 Rodeo Arena Updates
- 47 Stock Pens
- 48 Existing Campground Toilet/Shower Building
- 49 New Restroom Building
- 50 New Entry Gate
- 51 Existing Main Entry Gate
- 52 New Internal Loop Road
- 53 Fire Station
- 54 Existing Dump Station
- 55 Fenced in Livestock Zone
- 56 Covered Walk from Livestock Zone to Indoor Arena Building
- 57 Off-Season Building Drop-Off/Entry
- 58 Event Drop-Off/Ride Share/Bus Zone
- 59 Open Air Rental Pavilion (includes Toilets)

- Event Fence Line
- Parking Fence Line
- Existing Campground
- Expansion Campground
- Removed Structure/Building
- Maintenance Yard
- Gate Letter
- Tree Location (Existing and Proposed)

A J



North



North Idaho State Fair

Coeur d'Alene, Idaho

Final Master Plan

- 1 Renovate Building 1 - Vendors
- 2 Renovate Building 2 - Vendors
- 3 Renovate Building 3 - 4H/Plant Exhibits
- 4 Remove Stampede Room
- 5 Remove Maintenance Building
- 6 Wildlife Center
- 7 Remove Vendor Building
- 8 Remove Arts/Crafts Building
- 9 Remove Alpaca Barn
- 10 Remove Grange Building
- 11 Remove Poultry Barn
- 12 Remove Rabbit Barn
- 13 Remove 4H Office
- 14 Remove Existing Grandstand & Rodeo Arena
- 15 Remove Draft Horse Barn
- 16 Remove Goat Barn
- 17 Remove Art Gallery Building
- 18 Remove Restrooms
- 19 Remove Home Arts
- 20 Remove Food Court Building
- 21 Remove/Relocate Farm Park Pavilion
- 22 Remove Cattle Barn
- 23 Carnival/Park Area
- 24 First Aid Building
- 25 Remove Jacklin Building
- 26 Remove Horse Stall Barn
- 27 Remove Outdoor Arenas
- 28 Remove North Area & Barns
- 29 Parking
- 30 Existing Campground (approx. 36 Hook-ups)
- 31 Expanded Campground (32 Hook-ups)
- 32 New Indoor Arena/Grandstand/
Multipurpose Building
- 33 Storage Building/Park
- 34 New Multi-Purpose Livestock Building
- 35 New Multi-Purpose Livestock Building
- 36 New Outdoor Arena
- 37 New Multi-Purpose Hoop Barns
- 38 Remove/Replace Maintenance Buildings
- 39 Maintenance Yard - Fenced
- 40 Paved Parking
- 41 Not Used
- 42 Remove VIP Areas over stock pens
- 43 New Administration/Extension/4H Offices
- 44 New Multi-Purpose Expo Building
- 45 New Grandstand Plaza
- 46 Not Used
- 47 Not Used
- 48 Existing Campground Toilet/Shower Building
- 49 Not Used
- 50 New Entry Gate
- 51 Existing Main Entry Gate
- 52 New Internal Loop Road
- 53 Fire Station
- 54 Existing Dump Station
- 55 Fenced in Livestock Zone
- 56 Covered Walk from Livestock Zone to
Indoor Arena Building
- 57 Not Used
- 58 Event Drop-Off/Ride Share/Bus Zone

- Event Fence Line
- Parking Fence Line
- Existing Campground
- Expansion Campground
- Removed Structure/Building
- Maintenance Yard
- Gate Letter
- Tree Location (Existing and Proposed)



0 125' 250' 500'



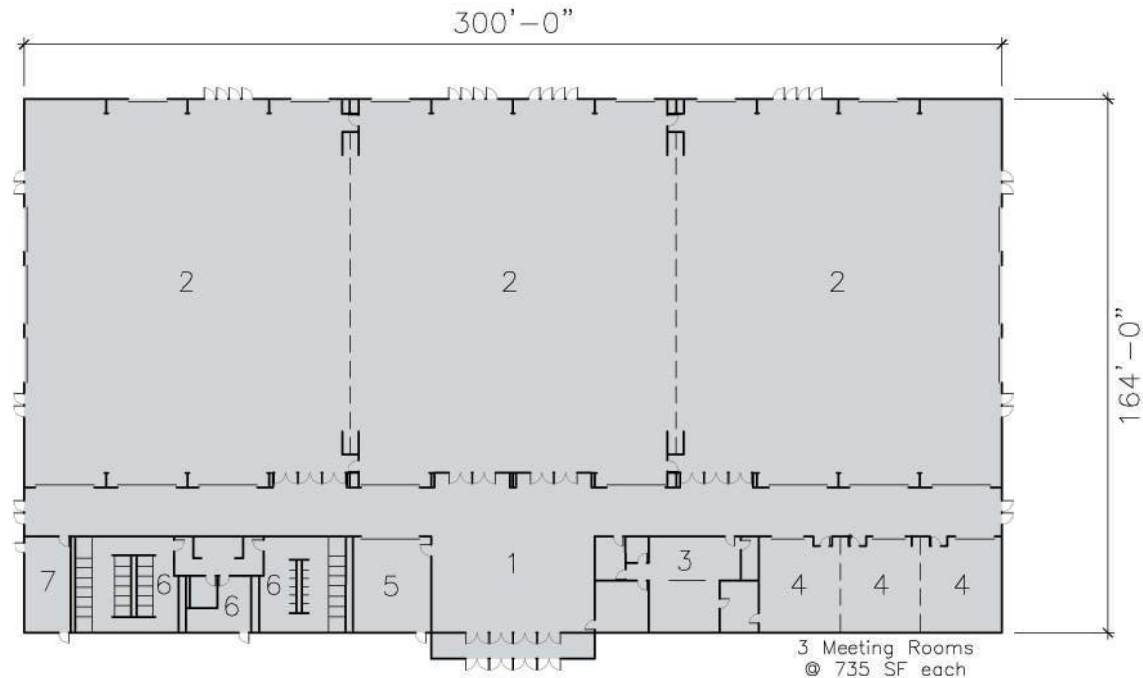
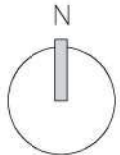
K/O Fairground Planners www.k-o.com

3D Aerial Rendering



Proposed Building Layout

- 1 Entry
- 2 Meeting Hall
- 3 Offices
- 4 Meeting Room
- 5 Kitchen/Concessions
- 6 Restrooms, Janitor
- 7 Mechanical/Storage



49,600 Total SF



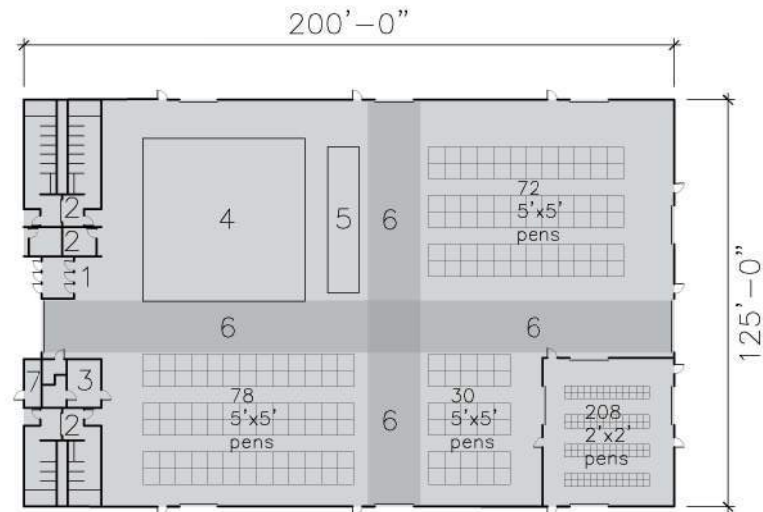
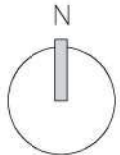
K/O FAIRGROUND PLANNERS

650 SOUTH PRAIRIE VIEW DRIVE, STUDIO 103
WEST DES MOINES, IOWA 50266
515-288-4821 www.k-o.com

New Exhibition Building
North Idaho Fairgrounds
Coeur d'Alene, Idaho
1.11.2024

Proposed Building Layout

- 1 Entry
- 2 Restrooms
- 3 Office
- 4 Judging Arena—50'x50'
- 5 Bleacher Seats—150
- 6 16' Drive Aisle
- 7 Mechanical

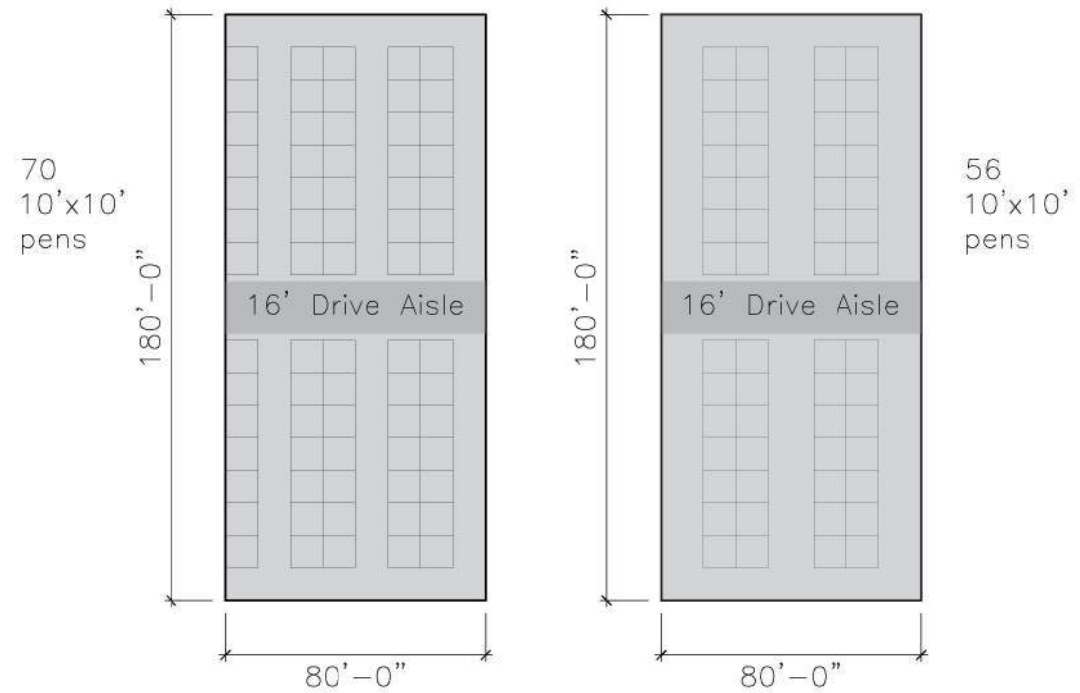
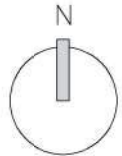


K/O FAIRGROUND PLANNERS

650 SOUTH PRAIRIE VIEW DRIVE, STUDIO 103
WEST DES MOINES, IOWA 50266
515-288-4821 www.k-o.com

New Animal Building
North Idaho Fairgrounds
Coeur d'Alene, Idaho
1.11.2024

Proposed Building Layout



K/O FAIRGROUND PLANNERS

650 SOUTH PRAIRIE VIEW DRIVE, STUDIO 103
WEST DES MOINES, IOWA 50266
515-288-4821 www.k-o.com

New Animal Hoop Barn
North Idaho Fairgrounds
Coeur d'Alene, Idaho
1.11.2024

BUDGET - December 30, 2023**STATEMENT OF PROBABLE BUDGET****North Idaho State Fair Master Plan****Narrative:**

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ID	Work Category	Area	Units	Cost/Unit	Cost	Work Type
Demolition						
4	Stampede Room	1,800	SF	\$4.00	\$7,200.00	D
5	Maintenance Building	2,400	SF	\$4.00	\$9,600.00	D
7	Vendor Building	3,500	SF	\$4.00	\$14,000.00	D
8	Arts/Crafts Building	3,500	SF	\$4.00	\$14,000.00	D
9	Alpaca Barn	3,000	SF	\$4.00	\$12,000.00	D
10	Grange Building	3,000	SF	\$4.00	\$12,000.00	D
11	Poultry Barn	3,000	SF	\$4.00	\$12,000.00	D
12	Rabbit Barn	3,000	SF	\$4.00	\$12,000.00	D
13	4H Office	700	SF	\$4.00	\$2,800.00	D
14	Grandstand	22,500	SF	\$4.00	\$90,000.00	D
15	Draft horse Barn	7,200	SF	\$4.00	\$28,800.00	D
16	Goat Barn	5,000	SF	\$4.00	\$20,000.00	D
17	Art Gallery Building	3,000	SF	\$4.00	\$12,000.00	D
18	Restrooms	500	SF	\$4.00	\$2,000.00	D
19	Home Arts Building	3,000	SF	\$4.00	\$12,000.00	D
20	Food Court Building	9,100	SF	\$4.00	\$36,400.00	D
21	Relocated Farm Park Pavilion	1,800	SF	\$4.00	\$7,200.00	D
22	Cattle Barn	7,200	SF	\$4.00	\$28,800.00	D
25	Jacklin Building	19,200	SF	\$4.00	\$76,800.00	D
26	Horse Stall Barn	5,400	SF	\$4.00	\$21,600.00	D
27	Outdoor Arenas	95,000	SF	\$0.25	\$23,750.00	SD
28	North Area Barns	23,000	SF	\$4.00	\$92,000.00	D
					\$546,950.00	
Renovations/Updates						
1	Building 1 - Vendors	13,000	SF	\$78.00	\$1,014,000.00	P,R,E,F,M,MC,C,WF
2	Building 2 - Vendors	5,000	SF	\$78.00	\$390,000.00	P,R,E,F,M,MC,C,WF
3	Building 3 - 4H/Plant Exhibits	4,550	SF	\$78.00	\$354,900.00	P,R,E,F,M,MC,C,WF
6	Wildlife Center	2,975	SF	\$78.00	\$232,050.00	P,R,E,F,M,MC,C,WF
24	First Aid Building	200	SF	\$44.00	\$8,800.00	P,R,E,MC,C
33	Storage Building	600	SF	\$44.00	\$26,400.00	P,R,E,MC,C
48	Toilet Shower Building	900	SF	\$8.00	\$7,200.00	P,MC
51	Main Entry Gate	800	SF	\$8.00	\$6,400.00	P,MC
					\$2,039,750.00	
New Facilities						
32	Indoor Arena/Multi-Purpose Building	145,000	SF	\$450.00	\$65,250,000.00	NA
34	Multi-Purpose Livestock Building	22,500	SF	\$390.00	\$8,775,000.00	NL
35	Multi-Purpose Livestock Building	22,500	SF	\$390.00	\$8,775,000.00	NL
37	Multi-Purpose Hoop Barns	60,000	SF	\$220.00	\$13,200,000.00	NS
38	Maintenance Buildings	11,000	SF	\$300.00	\$3,300,000.00	NM
43	Administration/Extention/4H Offices	2,500	SF	\$450.00	\$1,125,000.00	NO
44	Multi-Purpose Expo Building	50,000	SF	\$415.00	\$20,750,000.00	NE
A	A - Vehicle Gate	50	LF	\$68.00	\$3,400.00	LV
B	B - Walk-thru Ticketing Entry Gate	350	SF	\$380.00	\$133,000.00	NT
50	C - Walk-thru Ticketing Entry Gate	500	SF	\$380.00	\$190,000.00	NT
D	D - Walk-thru Ticketing Entry Gate	250	SF	\$380.00	\$95,000.00	NT
E	E - Vehicle Gate	60	LF	\$68.00	\$4,080.00	LV
F	F - Walk-thru Ticketing Entry Gate	250	SF	\$380.00	\$95,000.00	NT
G	G - Livestock Gate	60	LF	\$68.00	\$4,080.00	LV
H	H - Walk-thru Ticketing Entry Gate	250	SF	\$380.00	\$95,000.00	NT
I	I - Vehicle Gate	60	LF	\$68.00	\$4,080.00	LV
J	J - Vehicle Gate	60	LF	\$68.00	\$4,080.00	LV
K	K - Vehicle Gate	60	LF	\$68.00	\$4,080.00	LV
56	Covered Walk from Livestock Zone to Indoor Arena	17,000	SF	\$220.00	\$3,740,000.00	NS
					\$125,546,800.00	

BUDGET - December 30, 2023

STATEMENT OF PROBABLE BUDGET

North Idaho State Fair Master Plan

Narrative:

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ID	Work Category	Area	Units	Cost/Unit	Cost	Work Type
Facility Core Improvements						
	Site Storm Sewer 12-inch Service	15,000	LF	\$140.00	\$2,100,000.00	No Work Type
	Site Sanitary Sewer 6-inch Service	15,000	LF	\$75.00	\$1,125,000.00	No Work Type
	Site Water 1-inch Service	15,000	LF	\$40.00	\$600,000.00	No Work Type
	Site Power	15,000	LF	\$60.00	\$900,000.00	No Work Type
	General Pedestrian Site Lighting	130	Unit	\$6,000.00	\$780,000.00	No Work Type
29	Large Overhead Parking Lot General - Site Lighting	12	Unit	\$9,000.00	\$108,000.00	No Work Type
	Vendor Utility Hook-ups	85	Unit	\$9,000.00	\$765,000.00	No Work Type
30	Existing Campground	50,625	SF	\$0.00	\$0.00	No Work
31	Expanded Campground RV Hook-ups	32	Unit	\$9,000.00	\$288,000.00	No Work Type
39	Maintenance Yard - Site Prep	140,000	SF	\$2.00	\$280,000.00	SP
39	Maintenance Yard - Fencing	1,500	LF	\$28.00	\$42,000.00	LF
23	Midway Power	20	Unit	\$8,000.00	\$160,000.00	No Work Type
					\$7,148,000.00	
Parking						
29	Parking (Turf)	1,450,000	SF	\$2.00	\$2,900,000.00	SP
34	Barn 34 Pavement	15,000	SF	\$20.00	\$300,000.00	CTLU
35	Barn 35 Pavement	15,000	SF	\$20.00	\$300,000.00	CTLU
40	Paved Parking - South	50,000	SF	\$20.00	\$1,000,000.00	CTLU
					\$4,500,000.00	
Roadways						
52	New Internal Loop Road	50,000	SF	\$15.00	\$750,000.00	CT
58	South Boulevard - Event Drop-Off/Ride Share/Bus Zone	30,000	SF	\$15.00	\$450,000.00	CT
31	Additional Campground Parking/Roadways	55,000	SF	\$15.00	\$825,000.00	CT
	N/S Road 1 - West	52,000	SF	\$15.00	\$780,000.00	CT
	N/S Road 2 - Center	50,000	SF	\$15.00	\$750,000.00	CT
	N/S Road 3 - East	55,000	SF	\$15.00	\$825,000.00	CT
	E/W Road 1 - North	55,000	SF	\$15.00	\$825,000.00	CT
	E/W Road 2 - Center	45,000	SF	\$15.00	\$675,000.00	CT
	E/W Road 3 - South	45,000	SF	\$15.00	\$675,000.00	CT
	South Drop-Off Curved	48,000	SF	\$15.00	\$720,000.00	CT
					\$7,275,000.00	
Park Features						
23	Carnival/Park Area	175,000	SF	\$2.00	\$350,000.00	SP
33	Park	18,000	SF	\$2.00	\$36,000.00	SP
36	Outdoor Arena	60,000	SF	\$19.00	\$1,140,000.00	A,MC,SP
45	Grandstand Plaza	15,000	SF	\$20.00	\$300,000.00	CTLU
					\$1,826,000.00	
Other Features						
55	Fenced in Livestock Zone	100,000	SF	\$2.00	\$200,000.00	SP
	Main Grounds - Fencing	5,500	LF	\$28.00	\$154,000.00	LF
53	Existing Fire Station	4,000	SF	\$0.00	\$0.00	No Work
54	Existing Dump Station	24,000	SF	\$0.00	\$0.00	No Work
					\$354,000.00	

Construction Subtotal		\$149,236,500.00
General Conditions	5%	\$7,461,825.00
Subtotal		\$156,698,325.00
Contractor Overhead & Profit	5%	\$7,834,916.25
Subtotal		\$164,533,241.25
Fees and Development Costs	8%	\$13,162,659.30
Subtotal		\$177,695,900.55
Contingency	10%	\$17,769,590.06
Subtotal		\$195,465,490.61
3 Years Inflation	12.0%	\$23,455,858.87
Probable Construction Cost Total		\$218,921,349.48
		All Costs Combined

BUDGET - December 30, 2023

STATEMENT OF PROBABLE BUDGET

North Idaho State Fair Master Plan

Narrative:

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ID Work Category

Area Units Cost/Unit Cost Work Type

Averaged Costs per SF of above work items	Cost/SF	Key to Work	Keys to Combinations of Work Types for various projects as shown above	
No Work	\$0.00	No Work	\$0.00	No Work
Building Demolition	\$4.00	D	\$4.00	D
Site Demolition	\$0.25	SD	\$0.25	SD
New Expo Construction	\$415	NE	\$415	NE
New Livestock Barn Construction	\$390	NL	\$390	NL
New Maintenance Bldg. Construction	\$300	NM	\$300	NM
New Indoor Arena Construction	\$450	NA	\$450	NA
New Office Construction	\$450	NO	\$450	NO
New Walk-thru Ticketing Entry Gate	\$380	NT	\$380	NT
New Vehicle Gate	\$100	NV	\$100	NV
New Overhead Structure	\$220	NS	\$220	NS
New Animal Stalling	\$12.00	A	\$12.00	A
Paint	\$3.00	P	\$3.00	P
Roof Repairs	\$12.00	R	\$78.00	P,R,E,F,M,MC,C,WF
Electrical & Lighting	\$15.00	E	\$44.00	P,R,E,MC,C
Fan	\$3.00	F	\$8.00	P,MC
Other Mechanical	\$11.00	M	\$19.00	A,MC,SP
Miscellaneous Items	\$5.00	MC	-	-
Fencing - Linear Foot	\$28.00	LF	\$28.00	LF
Vehicle Gate - Linear Foot	\$68.00	LV	\$68.00	LV
General Site Prep	\$2.00	SP	\$2.00	SP
Concrete Flooring/Sidewalk Replacement	\$9.00	C	\$9.00	C
Concrete Paving - Traffic Rated	\$15.00	CT	\$15.00	CT
Wall and Floor Finishes	\$20.00	WF	-	-
Concrete Paving - Traffic Rated, Lights, Utilities	\$20.00	CTLU	\$20.00	CTLU

BUDGET - BUCKET SEPARATION - December 30, 2023

POSSIBLE BUDGET SEPARATION BY BUCKETS - USE BUCKETS TO HELP DEFINE FUTURE PHASING

North Idaho State Fair Master Plan

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ID	Work Category	Bucket 1 Expo Hall Barn 35	Bucket 2 Maintenance & Existing	Bucket 3 Barn 34 & Hoop Barns	Bucket 4 Expanded Campground	Bucket 5 Circulation & Gates	Bucket 6 Indoor Arena and Livestock
Demolition							
4	Stampede Room	\$7,200					
5	Maintenance Building					\$9,600	
7	Vendor Building	\$14,000					
8	Arts/Crafts Building	\$14,000					
9	Alpaca Barn	\$12,000					
10	Grange Building	\$12,000					
11	Poultry Barn	\$12,000					
12	Rabbit Barn	\$12,000					
13	4H Office					\$2,800	
14	Grandstand						\$90,000
15	Draft horse Barn			\$28,800			
16	Goat Barn			\$20,000			
17	Art Gallery Building			\$12,000			
18	Restrooms			\$2,000			
19	Home Arts Building			\$12,000			
20	Food Court Building			\$36,400			
21	Relocated Farm Park Pavilion					\$7,200	
22	Cattle Barn						\$28,800
25	Jacklin Building	\$76,800					
26	Horse Stall Barn	\$21,600					
27	Outdoor Arenas				\$23,750		
28	North Area Barns				\$92,000		
		\$181,600	\$0	\$111,200	\$115,750	\$19,600	\$118,800
Renovations/Updates							
1	Building 1 - Vendors		\$1,014,000				
2	Building 2 - Vendors		\$390,000				
3	Building 3 - 4H/Plant Exhibits		\$354,900				
6	Wildlife Center		\$232,050				
24	First Aid Building		\$8,800				
33	Storage Building		\$26,400				
48	Toilet Shower Building				\$7,200		
51	Main Entry Gate		\$6,400				
		\$0	\$2,032,550	\$0	\$7,200	\$0	\$0
New Facilities							
32	Indoor Arena/Multi-Purpose Building						\$65,250,000
34	Multi-Purpose Livestock Building			\$8,775,000			
35	Multi-Purpose Livestock Building	\$8,775,000		\$13,200,000			
37	Multi-Purpose Hoop Barns						
38	Maintenance Buildings		\$3,300,000				
43	Administration/Extention/4H Offices	\$1,125,000					
44	Multi-Purpose Expo Building	\$20,750,000					
A	A - Vehicle Gate					\$3,400	
B	B - Walk-thru Ticketing Entry Gate					\$133,000	
50	C - Walk-thru Ticketing Entry Gate	\$190,000					
D	D - Walk-thru Ticketing Entry Gate	\$95,000					
E	E - Vehicle Gate					\$4,080	
F	F - Walk-thru Ticketing Entry Gate					\$95,000	
G	G - Livestock Gate			\$4,080			
H	H - Walk-thru Ticketing Entry Gate			\$95,000			
I	I - Vehicle Gate	\$4,080					
J	J - Vehicle Gate					\$4,080	
K	K - Vehicle Gate				\$4,080		
56	Covered Walk from Livestock Zone to Indoor Arena			\$3,740,000			
		\$30,939,080	\$3,300,000	\$25,814,080	\$4,080	\$239,560	\$65,250,000

BUDGET - BUCKET SEPARATION - December 30, 2023
POSSIBLE BUDGET SEPARATION BY BUCKETS - USE BUCKETS TO HELP DEFINE FUTURE PHASING
North Idaho State Fair Master Plan
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ID	Work Category	Bucket 1 Expo Hall Barn 35	Bucket 2 Maintenance & Existing	Bucket 3 Barn 34 & Hoop Barns	Bucket 4 Expanded Campground	Bucket 5 Circulation & Gates	Bucket 6 Indoor Arena and Livestock
Facility Core Improvements							
	Site Storm Sewer 12-inch Service	\$350,000	\$350,000	\$350,000	\$350,000	\$350,000	\$350,000
	Site Sanitary Sewer 6-inch Service	\$187,500	\$187,500	\$187,500	\$187,500	\$187,500	\$187,500
	Site Water 1-inch Service	\$100,000	\$100,000	\$100,000	\$100,000	\$100,000	\$100,000
	Site Power	\$150,000	\$150,000	\$150,000	\$150,000	\$150,000	\$150,000
	General Pedestrian Site Lighting	\$130,000	\$130,000	\$130,000	\$130,000	\$130,000	\$130,000
29	Large Overhead Parking Lot General - Site Lighting	\$18,000	\$18,000	\$18,000	\$18,000	\$18,000	\$18,000
	Vendor Utility Hook-ups	\$127,500	\$127,500	\$127,500	\$127,500	\$127,500	\$127,500
30	Existing Campground				\$0		
31	Expanded Campground RV Hook-ups				\$288,000		
39	Maintenance Yard - Site Prep		\$280,000				
39	Maintenance Yard - Fencing		\$42,000				
23	Midway Power	\$26,667	\$26,667	\$26,667	\$26,667	\$26,667	\$26,667
		\$1,089,667	\$1,411,667	\$1,089,667	\$1,377,667	\$1,089,667	\$1,089,667
Parking							
29	Parking (Turf)	\$483,333	\$483,333	\$483,333	\$483,333	\$483,333	\$483,333
34	Barn 34 Pavement			\$300,000			
35	Barn 35 Pavement	\$300,000					
40	Paved Parking - South	\$1,000,000					
		\$1,783,333	\$483,333	\$783,333	\$483,333	\$483,333	\$483,333
Roadways							
52	New Internal Loop Road					\$750,000	
58	South Boulevard - Event Drop-Off/Ride Share/Bus Zone					\$450,000	
31	Additional Campground Parking/Roadways				\$825,000		
	N/S Road 1 - West					\$780,000	
	N/S Road 2 - Center			\$750,000			
	N/S Road 3 - East			\$825,000			
	E/W Road 1 - North					\$825,000	
	E/W Road 2 - Center			\$675,000			
	E/W Road 3 - South			\$675,000			
	South Drop-Off Curved	\$720,000					
		\$720,000	\$0	\$2,925,000	\$825,000	\$2,805,000	\$0
Park Features							
23	Carnival/Park Area	\$175,000		\$175,000			
33	Park	\$6,000	\$6,000	\$6,000	\$6,000	\$6,000	\$6,000
36	Outdoor Arena			\$1,140,000			
45	Grandstand Plaza					\$300,000	
		\$181,000	\$6,000	\$1,321,000	\$6,000	\$306,000	\$6,000
Other Features							
55	Fenced in Livestock Zone			\$200,000			
	Main Grounds - Fencing					\$154,000	
53	Existing Fire Station	\$0	\$0	\$0	\$0	\$0	\$0
54	Existing Dump Station	\$0	\$0	\$0	\$0	\$0	\$0
		\$0	\$0	\$200,000	\$0	\$154,000	\$0
Construction Subtotal							
		\$34,894,680	\$7,233,550	\$32,244,280	\$2,819,030	\$5,097,160	\$66,947,800
General Conditions							
		\$1,744,734	\$361,678	\$1,612,214	\$140,952	\$254,858	\$3,347,390
	Subtotal	\$36,639,414	\$7,595,228	\$33,856,494	\$2,959,982	\$5,352,018	\$70,295,190
Contractor Overhead & Profit							
		\$1,831,971	\$379,761	\$1,692,825	\$147,999	\$267,601	\$3,514,760
	Subtotal	\$38,471,385	\$7,974,989	\$35,549,319	\$3,107,981	\$5,619,619	\$73,809,950
Fees and Development Costs							
		\$3,077,711	\$637,999	\$2,843,945	\$248,638	\$449,570	\$5,904,796
	Subtotal	\$41,549,095	\$8,612,988	\$38,393,264	\$3,356,619	\$6,069,188	\$79,714,745
Contingency							
		\$4,154,910	\$861,299	\$3,839,326	\$335,662	\$606,919	\$7,971,475
	Subtotal	\$45,704,005	\$9,474,287	\$42,232,591	\$3,692,281	\$6,676,107	\$87,686,220
3 Years Inflation							
		\$5,484,481	\$1,136,914	\$5,067,911	\$443,074	\$801,133	\$10,522,346
	Probable Construction Cost Total	\$51,188,486	\$10,611,201	\$47,300,501	\$4,135,355	\$7,477,240	\$98,208,566
		Bucket 1 Expo Hall Barn 35	Bucket 2 Maintenance & Existing	Bucket 3 Barn 34 & Hoop Barns	Bucket 4 Expanded Campground	Bucket 5 Circulation & Gates	Bucket 6 Indoor Arena and Livestock

MARKET & FINANCIAL ANALYSIS

KOOTENAI COUNTY FAIRGROUNDS

NORTH IDAHO STATE FAIR

PRESENTED TO: NORTH IDAHO STATE FAIR BOARD

FINAL REPORT – APRIL 2024

*The market analysis conducted as part of this Master Plan was completed in November 2021. The financial analysis was completed after the preferred Master Plan concept was identified and agreed upon by the Client in 2024. As such, this report does not reflect any market changes that occurred after November 2021.

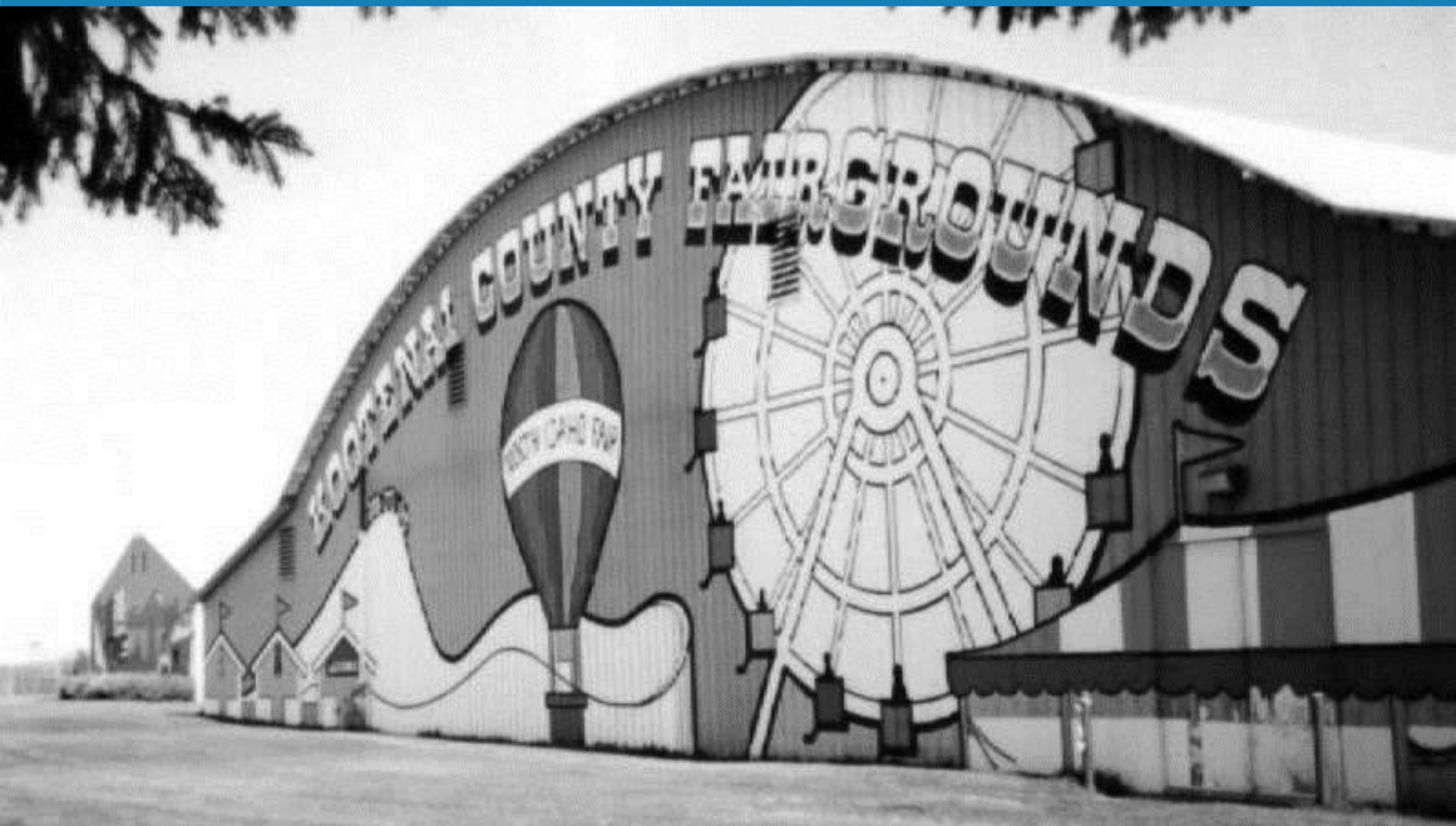


Photo Credit: Facility management.

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Source: Facility management.

1. INTRODUCTION



PROJECT BACKGROUND

The inception of the North Idaho State Fair (Fair or NISF) dates back to 1922 when the first 4-H fairs in Kootenai County (County) were held in Post Falls and Worley, Idaho. In 1937, the City of Coeur d'Alene (City) purchased the old Mill grounds and organized the North Idaho State Fair Board (Board) and constructed the first building a year later. In the early 1950s, the County and City swapped the downtown Fair site for a 110-acre parcel now known as Kootenai County Fairgrounds (Fairgrounds) where the Fair has been held ever since. The existing site is close to amenities such as parks, lakes, dining options and retail establishments as well as Silverwood Theme Park, which offers more than 70 rides, shows and attractions. Lake Coeur d'Alene is located directly to the south of the Fairgrounds and draws significant visitors to the area, particularly in the summer.

Portions of the Fairgrounds site have been designated for other purposes over the years. The Fairgrounds currently consists of 83 acres and includes 26 buildings and structures. In addition to being home of the North Idaho State Fair, the Fairgrounds is home to the Gem State Stampede which is considered a top Professional Rodeo Cowboys Association (PRCA) rodeo. The Fairgrounds also hosts a variety of non-fair event activity including auctions, banquets, wedding receptions, trade shows, science fairs, high school graduation parties, etc.

The Board's mission is committed to "producing a successful annual Fair, encouraging appropriate use of the facilities, and exploring ways in which the Fairgrounds can serve the educational and entertainment needs of the community" on a year-round basis. The Board assists the General Manager with establishing the annual budget and making decisions on personnel, facility improvements, safety issues, building rentals and fair entertainment. In 2012, the Board completed a Master Plan to create a vision for the Fairgrounds as a premiere, cost effective, year-round destination for family entertainment, recreation and education. A priority of the Board is to continually review and revise its master plan to ensure that the Fair and Fairgrounds reflect the educational and entertainment needs and interests of the vibrant, growing community.

The North Idaho Fair & Rodeo Foundation (Foundation) is a 501 (c) (3) organization that supports Fair & Rodeo and Fairgrounds programs and facilities by facilitating gifts like donations, annual pledges, or estate planning. The Foundation plays a critical role in financing the Fair and Fairgrounds since the Fair and Fairgrounds receive less than 10% of its annual budget from taxpayers. The mission of the Foundation is to raise funds for capital improvements at the Kootenai County Fairgrounds and for educational opportunities for area youth.

Consistent with the Board's mission and priorities, the project team of K/O Fairground Planners and Crossroads Consulting Services, LLC (Crossroads) was retained to develop a Master Plan that optimally positions the Board to achieve its goals in the future.

WORK PLAN

Specific tasks completed as part of this analysis include, but were not limited to, the following:

- Met virtually with client representatives to develop an understanding of the background and key issues related to the project; confirm study scope and objectives; identify key stakeholders and potential users to contact as part of the study process; and discuss project schedule.
- Attended the North Idaho State Fair.
- Obtained feedback from stakeholders regarding the relative strengths, challenges and opportunities associated with the Fairgrounds.
- Analyzed market attributes including demographic and socioeconomic metrics, employment base, transportation access, hotel inventory and climate statistics.
- Reviewed and analyzed historical operating data for the Fairgrounds which included the Fair.
- Profiled the competitive supply of facilities in the region.
- Analyzed market attributes, building program elements and operating data from a select number of peer facilities.
- Conducted market outreach with existing and potential user groups representing multiple market segments to obtain their input on market supportable event programming opportunities for the Fairgrounds.
- Summarized market analysis findings.
- Estimated impacts to operating revenues and operating expenses associated with implementation of the recommended improvements.

The market analysis, which includes sections 2 through 7 of this report, was completed in November 2021. The financial analysis was completed after the preferred Master Plan concept was identified and agreed upon by the Client in 2024. As such, this report does not reflect any market changes that occurred after November 2021.

2. LOCAL MARKET CONDITIONS



LOCAL MARKET CONDITIONS

This section of the report summarizes select market attributes including demographic and socioeconomic statistics, area employment, accessibility, hotel supply, and climate statistics.

When assessing future event programming opportunities for enhanced and/or new facilities at the Fairgrounds, it is important to understand the market in which it operates. Many variables such as demographic and economic conditions, the vibrancy of the area immediately surrounding a facility and overall destination appeal to both event planners/promoters and attendees can impact a facility's overall competitiveness within the broader marketplace.

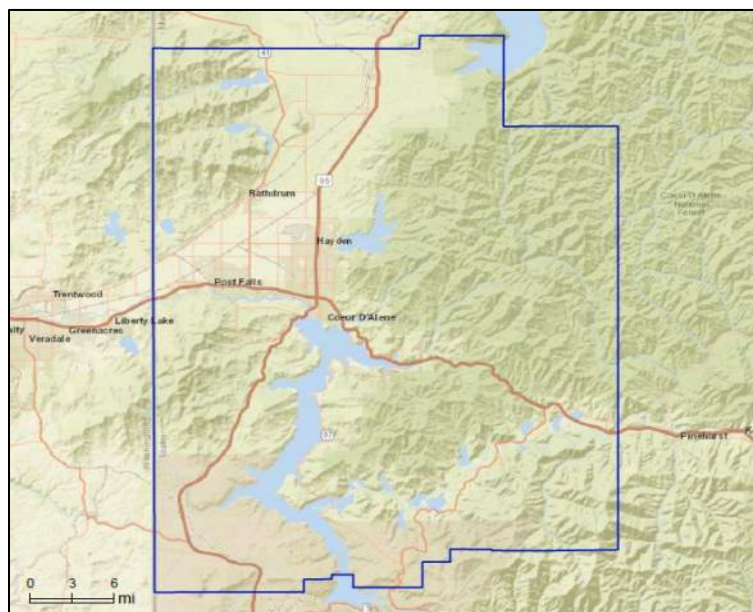
Demographic and Socioeconomic Statistics

Event promoters/producers typically consider a variety of factors such as population, age distribution, income characteristics, accessibility to the population base, as well as the facility building program and supporting infrastructure when deciding where to host their events. The importance that event planners/producers place on each of these factors differs based on the type of event.

Depending on the scope and nature of the event, facilities can draw both area residents and out-of-town attendees. While it is common for local, civic based events to attract attendees from a relatively close geographic area such as the County, other special events such as the Fair, entertainment events, and sanctioned competitions can draw attendees from beyond the immediate market such as a two or three-hour drive time from the Fairgrounds.

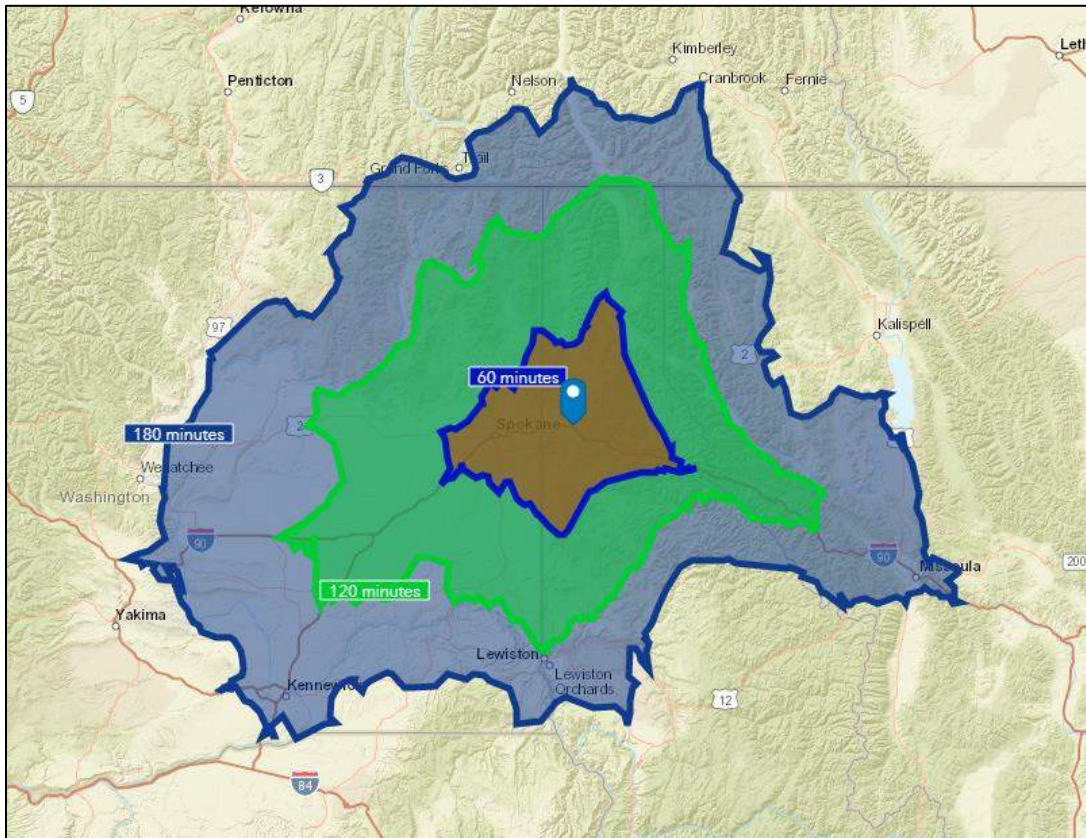
Demographic and socioeconomic data was analyzed for multiple geographic areas including the County; a 60-, 120- and 180-minute drive time from the Fairgrounds; the State of Idaho and the U.S.

Map of Kootenai County



Source: Esri.

Map of 60-, 120- and 180-Minute Drive Times from the Fairgrounds



Source: Esri.

Population

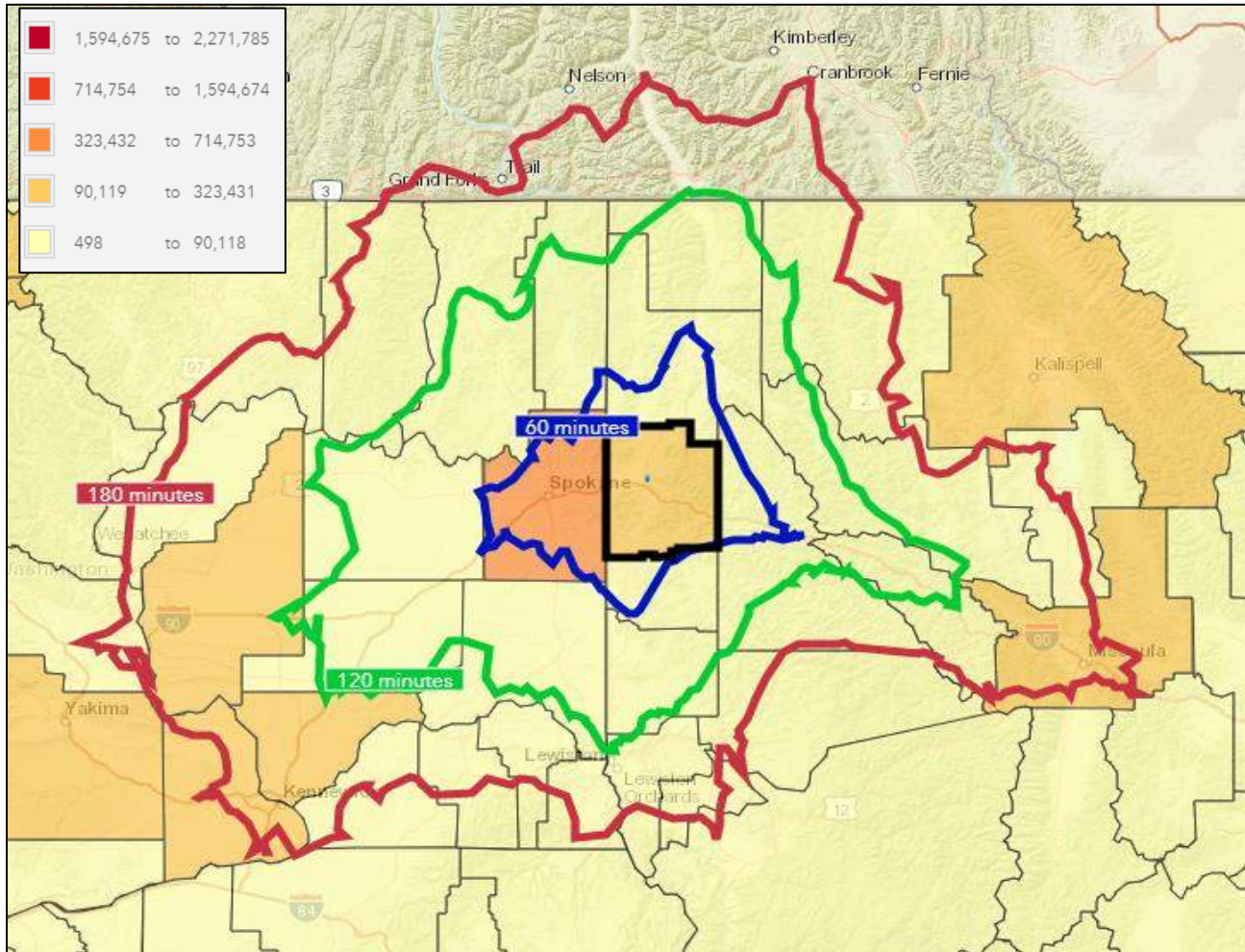
Population serves as a base from which events at the Fairgrounds draw attendance and other forms of support. Between 2000 and 2020, the County's population increased significantly from approximately 108,700 to 170,300. The County's population is projected to increase at an annual growth rate of 2.05% between 2020 and 2025, which is greater than that for all other profiled market areas. The significant increase in population within a 60-minute drive time is primarily attributable to Spokane and provides a target market for certain events at the Fairgrounds.

Total Population						
Population Summary	Kootenai County	60-Minute Drive Time	120-Minute Drive Time	180-Minute Drive Time	State of Idaho	U.S.
2000 Total Population	108,685	556,548	733,228	1,226,790	1,293,953	281,421,906
2010 Total Population	138,494	640,133	832,541	1,421,337	1,567,582	308,745,538
2020 Total Population	170,266	743,454	957,252	1,633,419	1,856,821	333,793,107
2025 Total Population	188,482	797,930	1,022,699	1,743,709	2,017,346	346,021,282
2000-2010 Annual Growth Rate	2.74%	1.50%	1.35%	1.59%	2.11%	0.97%
2010-2020 Annual Growth Rate	2.29%	1.61%	1.50%	1.49%	1.85%	0.81%
2020-2025 Annual Growth Rate (Projected)	2.05%	1.42%	1.33%	1.32%	1.67%	0.72%

Source: Esri.

The map below illustrates population density within the County and each profiled drive-time. As shown, the County is one of the more populated areas within a 180-minute drive of the Fairgrounds. The 60-minute drive time of the Fairgrounds includes most of Spokane County, which is the most densely populated county within a 180-minute drive time. Many of the counties outside of the 60-minute drive have relatively small populations.

Map of Population Density

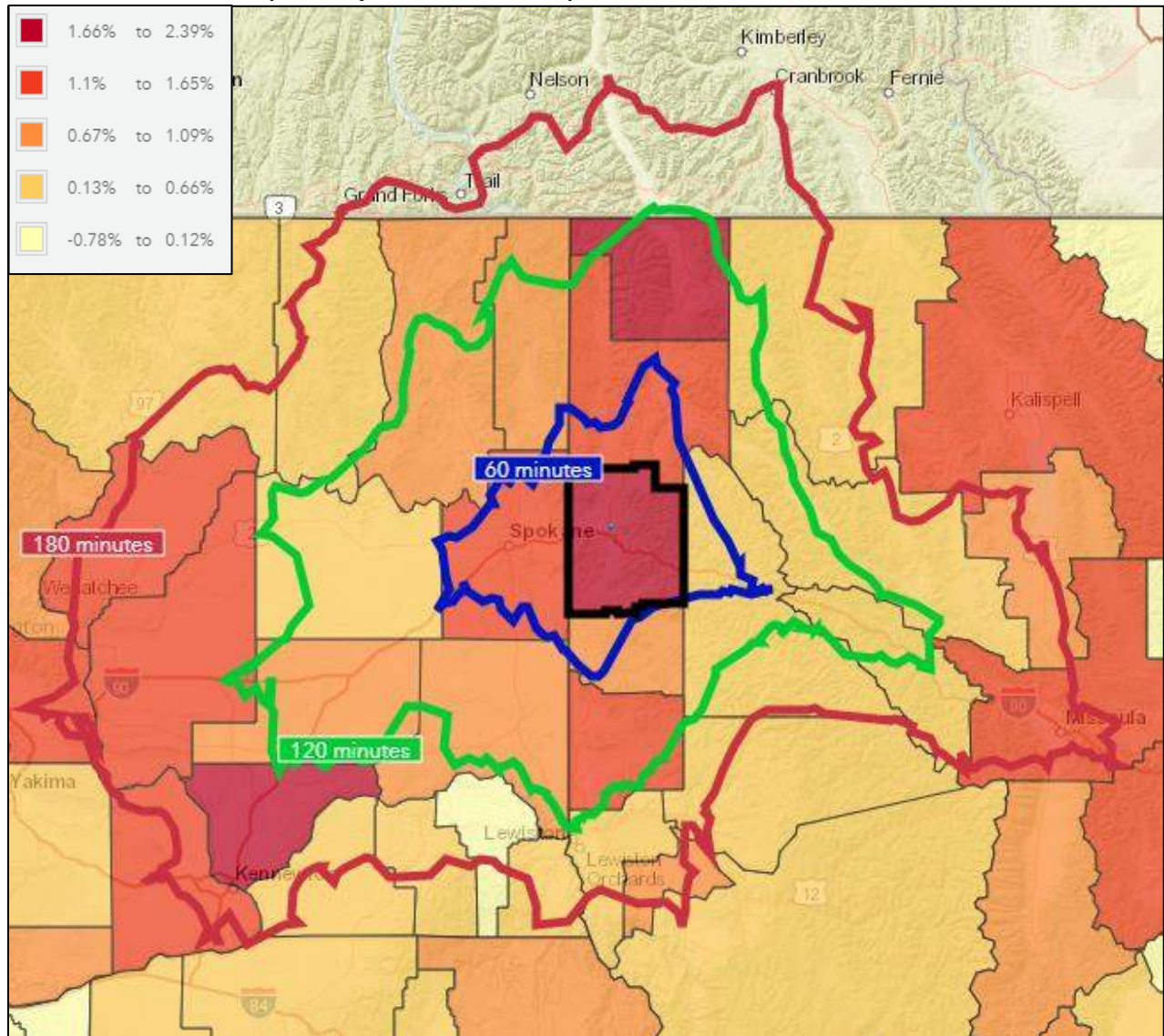


Note: Kootenai County is outlined in black.

Source: Esri.

The map below shows the projected annual population growth rate between 2020 and 2025 for the County and each profiled drive-time. Most areas are expected to experience population growth during this time span. As previously mentioned, the County is projected to be one of the fastest growing areas within a 180-minute drive time during the profiled five-year period.

Map of Projected Annual Population Growth (2020 – 2025)



Note: Kootenai County is outlined in black.

Source: Esri.

Number of Households

The table below illustrates the number of households within each of the profiled market areas. A household consists of one or more people occupying a single housing unit. Similar to population, the five-year projected growth rate (2.03%) for households in the County is the highest among the profiled markets.

Number of Households						
Household Summary	Kootenai County	60-Minute Drive Time	120-Minute Drive Time	180-Minute Drive Time	State of Idaho	U.S.
2000 Total Households	41,308	217,596	284,827	467,772	469,645	105,480,101
2010 Total Households	54,200	254,721	331,772	551,925	579,408	116,716,292
2020 Total Households	66,299	295,450	381,390	632,996	684,363	126,083,849
2025 Total Households	73,294	317,056	407,683	675,708	743,088	130,658,485
2000-2010 Annual Growth Rate	3.12%	1.71%	1.65%	1.80%	2.34%	1.07%
2010-2020 Annual Growth Rate	2.23%	1.60%	1.50%	1.47%	1.81%	0.80%
2020-2025 Annual Growth Rate (Projected)	2.03%	1.42%	1.34%	1.31%	1.66%	0.72%

Source: Esri.

Household Income Distribution

Income offers a broad measurement of spending potential for a specific population because it indicates the general ability of individuals or households to purchase a variety of goods and services including admission to events and participation in activities. The 2020 median household income was \$56,452 in the County, which was relatively consistent with that for each of the profiled drive times and the State but lower than that for the U.S. (\$62,203).

Household Income Distribution						
2020 Household Income Distribution	Kootenai County	60-Minute Drive Time	120-Minute Drive Time	180-Minute Drive Time	State of Idaho	U.S.
Less than \$15,000	9.7%	10.0%	11.3%	10.4%	9.6%	10.3%
\$15,000 to \$24,999	7.9%	9.4%	9.8%	9.6%	9.7%	8.8%
\$25,000 to \$34,999	8.8%	8.9%	9.5%	9.6%	9.6%	8.7%
\$35,000 to \$49,999	16.6%	14.2%	14.2%	14.3%	14.8%	12.2%
\$50,000 to \$74,999	20.4%	19.8%	19.6%	19.7%	21.1%	17.3%
\$75,000 to \$99,999	13.3%	13.7%	13.1%	13.1%	12.6%	12.6%
\$100,000 to \$149,999	13.2%	13.7%	13.1%	13.6%	13.5%	15.3%
\$150,000 to \$199,000	6.1%	5.2%	4.9%	5.2%	4.9%	6.9%
\$200,000+	4.1%	5.0%	4.6%	4.5%	4.2%	7.9%
2020 Median Household Income	\$56,452	\$57,062	\$54,862	\$55,680	\$55,378	\$62,203
2025 Median Household Income (Projected)	\$59,837	\$61,409	\$58,970	\$59,856	\$58,623	\$67,325
2020-2025 Annual Growth Rate (Projected)	1.2%	1.5%	1.5%	1.5%	1.2%	1.6%
2020 Average Household Income	\$76,738	\$78,154	\$75,192	\$75,908	\$74,809	\$90,054
2025 Average Household Income (Projected)	\$84,548	\$87,450	\$84,296	\$84,801	\$82,714	\$99,510
2020-2025 Annual Growth Rate (Projected)	2.0%	2.4%	2.4%	2.3%	2.1%	2.1%

Source: Esri.

Age Distribution						
2020 Population by Age	Kootenai County	60-Minute Drive Time	120-Minute Drive Time	180-Minute Drive Time	State of Idaho	U.S.
Age 0-4	6.1%	5.8%	5.6%	6.2%	7.2%	6.0%
Age 5-9	6.3%	6.0%	5.7%	6.2%	7.2%	6.1%
Age 10 - 14	6.3%	6.1%	5.9%	6.3%	7.1%	6.3%
Age 15 - 24	11.5%	13.0%	14.6%	14.0%	13.6%	13.0%
Age 25 - 34	13.3%	13.7%	13.4%	13.8%	13.6%	14.0%
Age 35 - 44	12.3%	12.2%	11.5%	11.8%	12.4%	12.6%
Age 45 - 54	12.2%	11.9%	11.6%	11.4%	11.3%	12.4%
Age 55 - 64	13.8%	13.5%	13.6%	13.1%	12.1%	13.0%
Age 65 - 74	11.2%	10.7%	10.9%	10.5%	9.5%	9.8%
Age 75 - 84	5.2%	5.0%	5.0%	4.8%	4.4%	4.8%
Age 85+	2.0%	2.2%	2.1%	2.0%	1.7%	2.0%
Age 18+	77.7%	78.6%	79.4%	77.8%	74.6%	78.0%
Age < 18	22.3%	21.4%	20.6%	22.2%	25.4%	22.0%
2020 Median Age	40.1	39.2	39.1	37.9	36.0	38.5

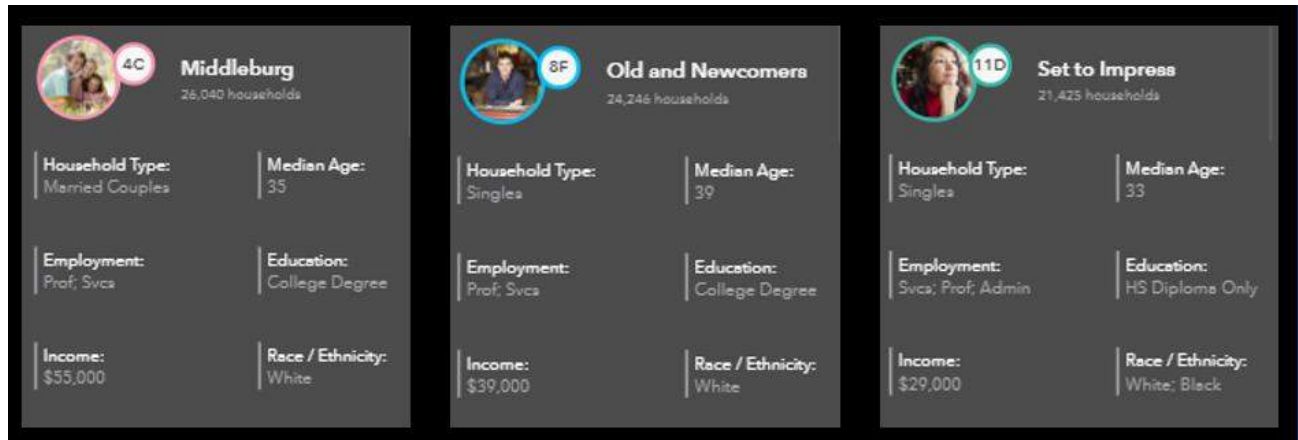
Source: Esri.

Tapestry Segmentation

According to ESRI, tapestry segmentation classifies neighborhoods into 67 segments on both demographics and socioeconomic attributes. They summarize lifestyle choices as well as what people buy and how people spend free time. The top tapestry segments within a 60-minute drive time of the Fairgrounds include Middleburg, Old and Newcomers, and Set to Impress. The following provides a brief description of each of these three tapestry segments as defined by ESRI.

1. **Middleburg (25.4% of 2020 Households):** Middleburg neighborhoods transformed from the easy pace of country living to semirural subdivisions in the last decade, when the housing boom reached out. Residents are conservative, family-oriented consumers. Still more country than rock and roll, they are thrifty but willing to carry some debt and are already investing in their futures. They rely on their smartphones and mobile devices to stay in touch and pride themselves on their expertise. They prefer to buy American and travel in the US. This market is younger but growing in size and assets.
2. **Old and Newcomers (8.2% of 2020 Households):** This market features singles' lifestyles, on a budget. The focus is more on convenience than consumerism, economy over acquisition. Old and Newcomers is composed of neighborhoods in transition, populated by renters who are just beginning their careers or retiring. Some are still in college; some are taking adult education classes. They support charity causes and are environmentally conscious. Age is not always obvious from their choices.

3. **Set to Impress (7.3% of 2020 Households):** Set to Impress is depicted by medium to large multi-unit apartments with lower-than-average rents. These apartments are often nestled into neighborhoods with other businesses or single-family housing. Nearly one in three residents is 20 to 34 years old, and over half of the homes are single person and nonfamily households. Although many residents live alone, they preserve close connections with their family. Income levels are low; many work in food service while they are attending college. This group is always looking for a deal. They are very conscious of their image and seek to bolster their status with the latest fashion. Set to Impress residents are tapped into popular music and the local music scene.



Source: Esri.

Area Employment

The employment base in the surrounding area provides a potential target market for events and financial support for the Fairgrounds, particularly at any enhanced and/or new facilities. For instance, area employers may utilize Fairgrounds for events and/or are a target market for advertising and sponsorship opportunities at the Fairgrounds.

The following table summarizes average year-end employment by industry in the Coeur d' Alene metropolitan statistical area (MSA) from 2016 through 2020. An MSA contains at least one core urban area of 50,000 or more inhabitants. Each metropolitan area consists of one or more counties and includes counties containing the core urban area, as well as any adjacent counties that have a high degree of social and economic integration with the urban core. The Coeur d' Alene MSA consists of Kootenai County.

A broad workforce distribution helps lessen a community's dependency on support from any one single industry segment which can be beneficial during economic downturns. While the MSA offers employment in various industries, trade, transportation and utilities and government have historically accounted for the largest number of total jobs in the area followed by government. Other industries that have accounted for a significant number of jobs include leisure and hospitality, education and health services, and professional and business services. In aggregate, employment in these profiled industries has increased slightly from 2016 to 2019. The decline in average year-end employment in 2020 is likely a result of the COVID-19 pandemic. In 2020, there were approximately 67,300 total jobs in the MSA based on data from the Bureau of Labor Statistics.

Employment by Industry in Coeur d'Alene MSA					
Industry	Total Jobs				
	2016	2017	2018	2019	2020
Trade, Transportation, and Utilities	11,600	11,800	12,200	12,500	12,700
Government	11,100	11,200	11,500	11,700	11,700
Leisure and Hospitality	8,700	8,900	9,300	9,800	9,200
Education and Health Services	7,800	8,100	8,400	8,600	8,500
Professional and Business Services	6,500	6,800	7,000	7,100	7,300
Mining, Logging, and Construction	4,900	5,300	5,600	6,100	6,300
Manufacturing	5,000	4,900	4,800	5,200	5,000
Financial Activities	3,400	3,600	3,900	3,800	3,900
Other Services	2,000	2,200	2,300	2,200	2,100
Information	600	600	700	600	600
Total	61,600	63,400	65,700	67,600	67,300

Notes: Total jobs reflect year-end averages.

Sorted in descending order by 2020 number of jobs.

Source: Bureau of Labor Statistics.

The following table summarizes the top 10 principal employers in the County in 2020. Kootenai Health was the largest employer in the area followed by the Silverwood Theme Park. The County, the Coeur d'Alene Casino and North Idaho College were also significant employers.

Top 10 Principal Employers - Kootenai County	
Employer	Employee Range
Kootenai Health	3,000+
Silverwood Theme Park	1,000 - 2,000
Kootenai County	800 - 899
Coeur d'Alene Casino (Tribe)	800 - 899
North Idaho College	800 - 899
Wal-Mart	600 - 699
US Bank	600 - 699
Qualfon Data	400 - 499
City of Coeur d'Alene	400 - 499
Northwest Specialty Hospital	300 - 399
Average Employment Size	882

Notes: Sorted in descending order by range of employees.

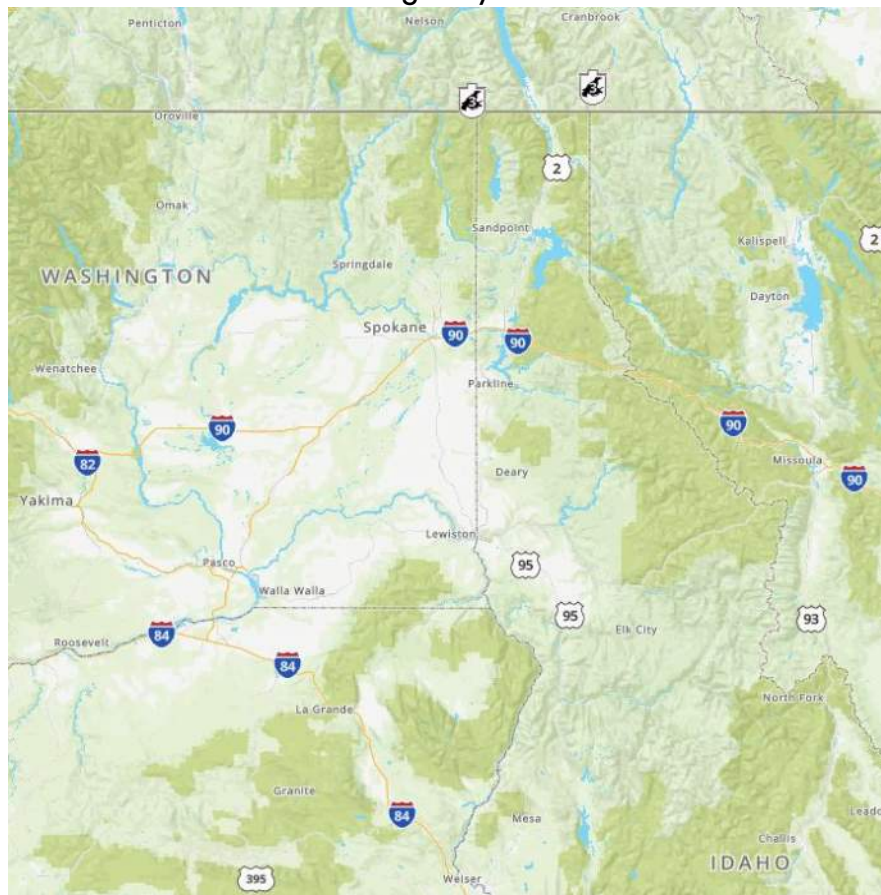
Some employment data, such as that related to school districts, was not available for 2020.

Source: Kootenai County Comprehensive Annual Financial Report - FY 2020.

Transportation Access

The method that event promoters/producers use to select venues to host their event is partially based on the ease of access to a market for attendees. In addition, the location and accessibility of a facility relative to the population base can impact its marketability for events. Coeur d'Alene is located approximately 10 miles east of Washington, 50 miles west of Montana and 80 miles south of Canada. As shown in the graphics that follow, east/west highway access is provided by Interstate 90 which allows for relatively easy access from Spokane, Washington. North/south highway access into Coeur d'Alene is primarily provided by US-95.

Area Highway Access



Source: Mapquest.

Proximate, convenient air access is beneficial in serving the needs of event promoters/producers, VIPs and attendees who require fly-in service. Commercial air service is primarily provided by the Spokane International Airport, which had approximately 1.9 million enplanements in 2019 (pre-COVID-19) and ranked 65th among all commercial service airports in the U.S. The drive time to/from the County from this airport is approximately one hour. The Federal Aviation Administration defines passenger enplanements as domestic, territorial and international passengers who board an aircraft in scheduled and non-scheduled service.

Hotel Supply

Hotel rooms proximate to the Fairgrounds can play a role in attracting events that draw overnight attendees. Research indicates that participants/spectators tend to travel further and stay longer when their choice of hotel is available.

As shown in the following table, there are 12 hotel properties in the County that offer 50 or more rooms. In aggregate, these properties offer approximately 1,630 hotel rooms. The existing hotel supply includes the Coeur d'Alene Resort and the Coeur d'Alene Casino Resort Hotel which are both large resort properties. Relative to location, hotels are primarily clustered at the junction of Interstate 90 and US-95 and near Lake Coeur d'Alene. In addition to the profiled hotels, there are many other hotel/motel properties in the County with less than 50 rooms. These properties are included in the map below.

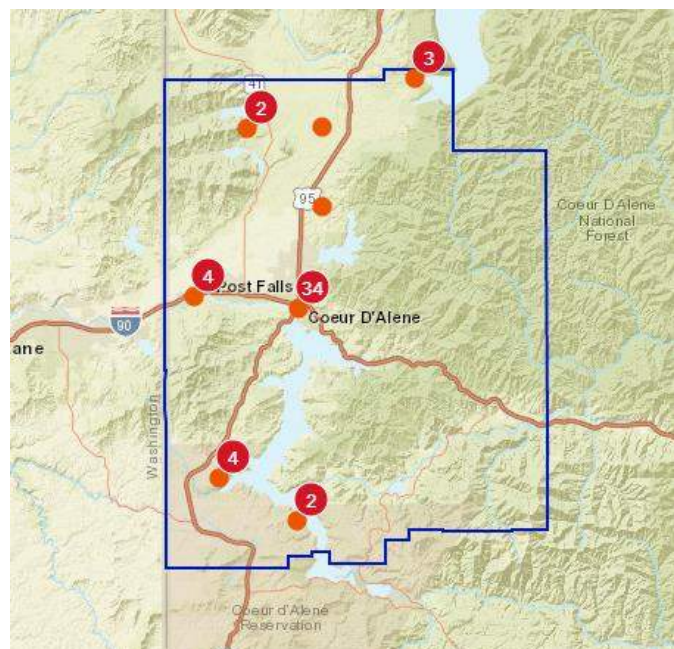
Hotel Supply in Kootenai County	
Property	Number of Rooms
The Coeur d'Alene Resort	338
Coeur d'Alene Casino Resort Hotel	314
Hampton Inn & Suites	124
Best Western Plus Inn & Conference Center	122
SpringHill Suites by Marriott	118
La Quinta Inns & Suites	118
Holiday Inn Express & Suites	101
Staybridge Suites	96
Triple Play Resort Hotel and Suites	95
Comfort Inn & Suites	92
Baymont Inn	62
FairBridge Inn	50
Total	1,630

Notes: Sorted in descending order by number of rooms.

Excludes hotels with less than 50 rooms.

Sources: Visit Coeur d'Alene; Esri; Facility websites.

Map of Hotel Supply – Kootenai County



Notes: Numbers within circles indicate the number of hotel properties in that area.

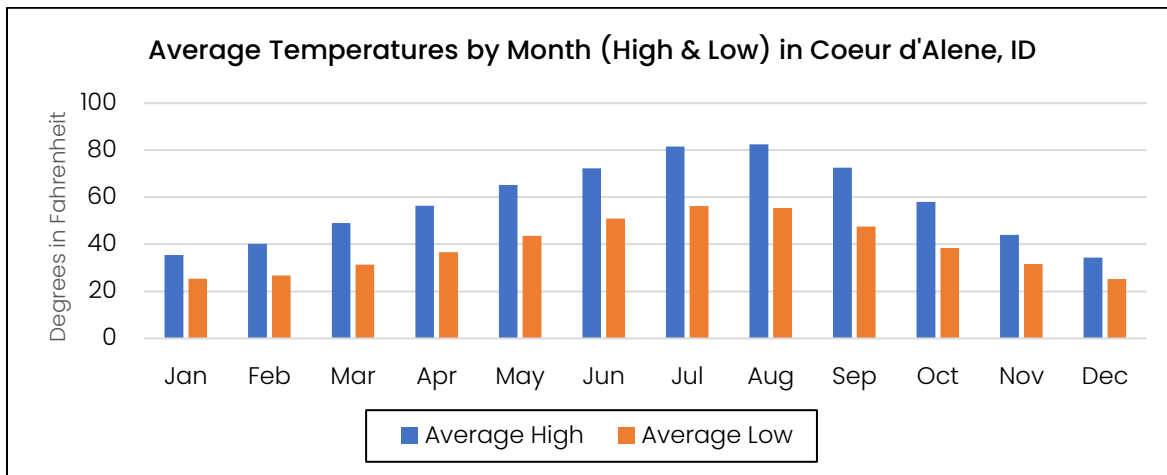
Smaller orange circles indicate one hotel property.

Total number of hotels differs from adjacent table due to the inclusion of smaller hotel/motel properties.

Source: Esri.

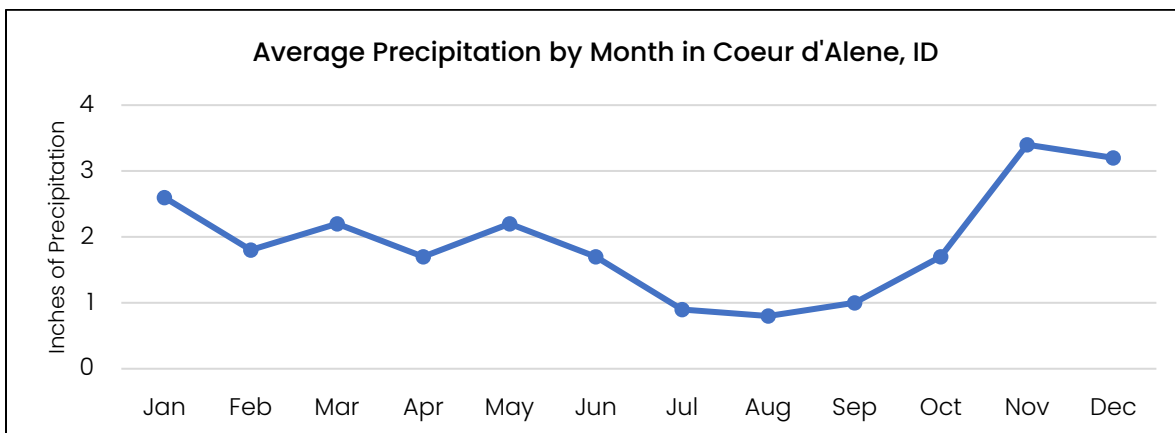
Climate Statistics

Climate is a factor as it can impact demand for certain types of facilities, seasonality, programming opportunities, usage levels and economics. On average, temperatures in Coeur d'Alene generally reach the 60s by May and gradually increase to the low 80s in July and August before falling back to the 50s in October. December through February are typically the coldest months when the average low is around 25 degrees.



Source: Weather Atlas.

Peak precipitation generally occurs in November, December and January.



Source: USA.com.

The Fair occurs in August which generally is one month with the least rainfall and highest temperature.

Key Observations

The following summarizes key observations of local market conditions.

- The County and surrounding experienced significant population growth between 2000 and 2020. The County's population is projected to grow at an annual rate of 2.05% between 2020 and 2025, which is higher than that for the State of Idaho and the U.S.
- A 60-minute drive time from the Fairgrounds includes most of Spokane County, which is densely populated and provides an opportunity for the Fairgrounds to draw attendees.
- Approximately 22% of the population within the County is under the age of 18 which is a target market for both 4-H and FFA activity.
- The 2020 median household income within the County (\$56,452) is lower than that of the State and the U.S.
- The County's population includes a mix of younger and older individuals. The tapestry segmentation suggest much of the population is either beginning their careers or retiring and are living on a budget. This, combined with median household income levels, indicates there is a need to offer diverse and affordable programming at the Fairgrounds that is appealing to these different segments.
- Vehicular access to Coeur d'Alene is generally good. Interstate 90 provides easy access from Spokane.
- The climate limits the amount of year-round activity that can be held in non-climate-controlled spaces at the Fairgrounds. From October through April the average high temperature is below 60 degrees.

3. OVERVIEW OF FAIRGROUNDS OPERATIONS



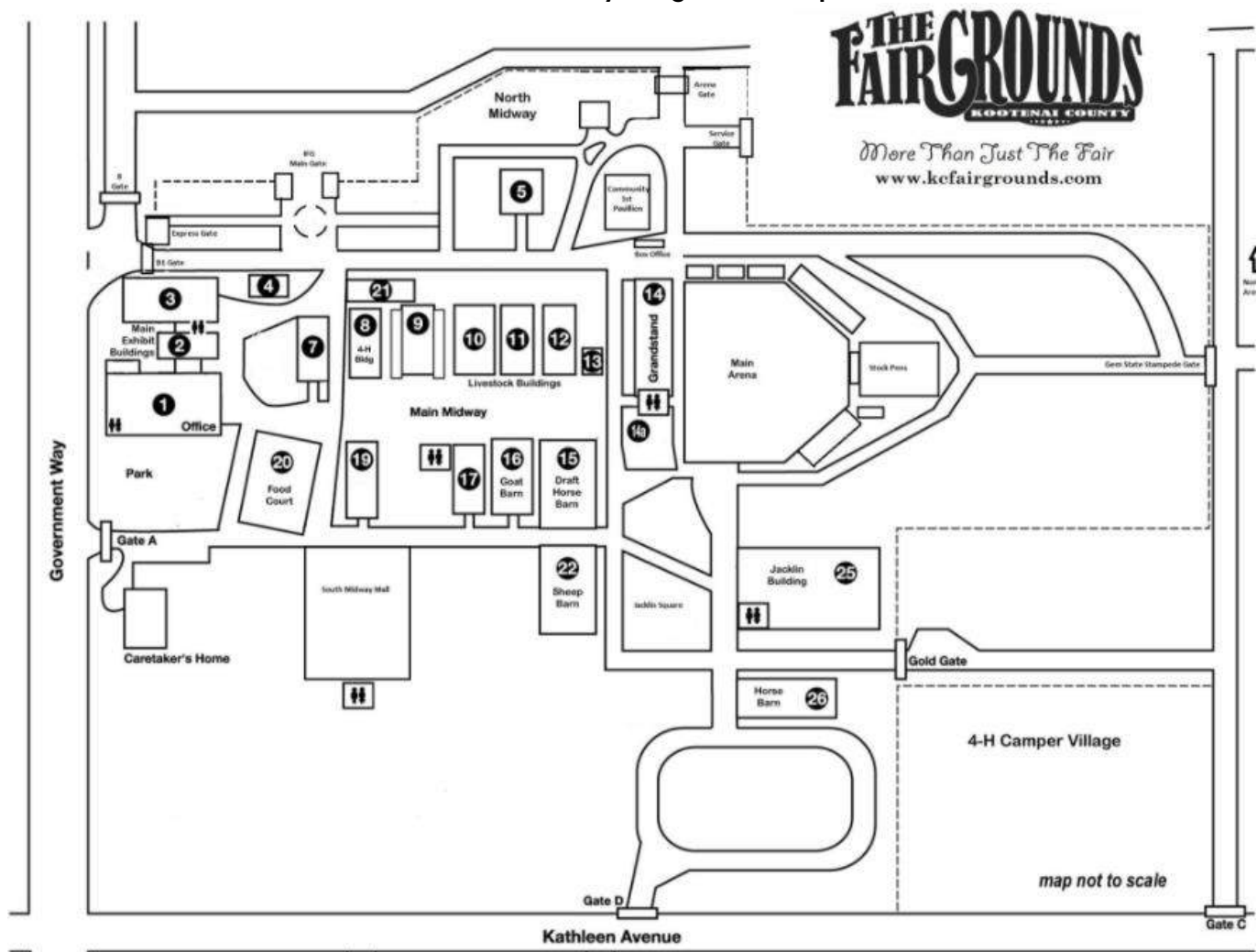
KOOTENAI COUNTY FAIRGROUNDS OPERATIONS

This section provides an overview of the Fairgrounds operations including the existing layout, facility attributes, organizational structure, booking policy, rental rate structure, usage/event activity and financial operations.

Existing Facilities

The Fairgrounds offers multiple facilities that can accommodate diverse event activity. The graphic below illustrates the layout of the Fairgrounds during non-Fair time. The pages that follow provide a description of the primary event spaces located on the Fairgrounds based on data provided by facility management.

Kootenai County Fairgrounds Map



Source: Facility website.

Jacklin Event Building #25

Facility Attributes:

- Indoor, Heating
- 16,500 SF
- Total Capacity: 2,000
- Banquet Capacity: 650

Primary Event Mix:

- Large Fundraisers
- Trade Shows
- Expos
- Sales

Location:

Southeast corner of the Fairgrounds



Source: Facility management.

Event Building #1

Facility Attributes:

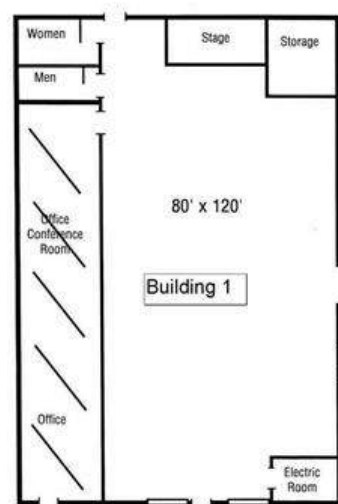
- Indoor, Heating
- 9,600 SF
- Total Capacity: 750
- Banquet Capacity: 500

Primary Event Mix:

- Wedding Receptions
- Fundraisers
- Trade Shows

Location:

West end of the Fairgrounds



Source: Facility management.

Event Building #2

Facility Attributes:

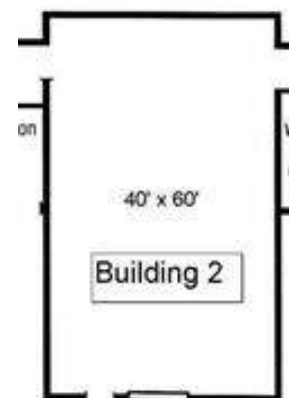
- Indoor, Heating
- 2,400 SF
- Total Capacity: 266
- Banquet Capacity: 160

Primary Event Mix:

- Small Gatherings

Location:

West end of the Fairgrounds



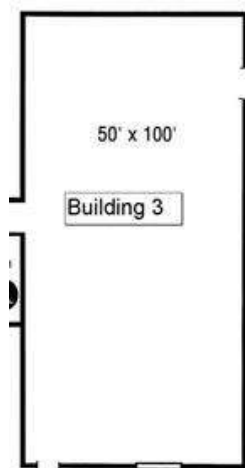
Event Building #3

Facility Attributes:

- Indoor, Heating
- 5,000 SF
- Total Capacity: 600
- Banquet Capacity: 270

Primary Event Mix:

- Weddings
- Meetings
- parties



Source: Facility management.

Location:

Northwest corner of the Fairgrounds

Stampede Room

Facility Attributes:

- Indoor
- 1,600 SF
- Banquet Capacity: 50

Primary Event Mix:

- Small Luncheons
- Meetings
- Hospitality Suite for Large Events



Source: Facility management.

Location:

Northwest corner of the Fairgrounds

Community 1st Pavilion

Facility Attributes:

- Outdoor
- 2,500 SF

Primary Event Mix:

- Picnics
- Reunions
- Weddings

Location:

North end of the Fairgrounds



Source: Facility management.

Findlay Arena

Facility Attributes:

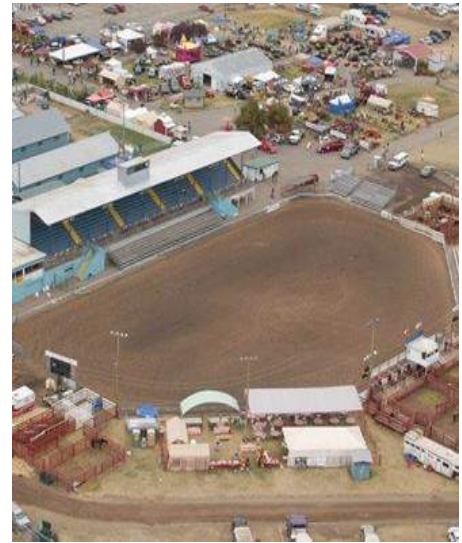
- 60,000 SF Outdoor Dirt Arena
- Grandstands and Bleacher Seating
- Concession Space and Beer Garden
- Total Capacity: 2,919

Primary Event Mix:

- Rodeos
- Arenacross

Location:

East end of the Fairgrounds



Source: Facility management.

North Arena

Facility Attributes:

- 54,000 SF Outdoor Dirt Arena
- Bleacher Seating Capacity: 50
- Warm-Up Arena
- 80 Stalls Available

Primary Event Mix:

- Horse Shows

Location:

North end of the Fairgrounds



Source: Facility management.

RV Park

Facility Attributes:

- Open April to November
- 28 RV spaces
- Restroom and Showers

Location:

Northeast corner of the Fairgrounds



Source: Facility management.

Event Building #19

Facility Attributes:

- Indoor, Carpeted, Heating, Ceiling Fans
- 3,040 SF
- Total Capacity: 288
- Banquet Capacity: 176

Primary Event Mix:

- Meetings
- Club Activities
- Parties
- Used as vendor building during the Fair



Source: Facility management.

Location:

Middle of the Fairgrounds

Event Building #7

Facility Attributes:

- Indoor, Asphalt Floor, Gas Heat
- 3,600 SF
- Total Capacity: 340



Source: Facility management.

Primary Event Mix:

- Used for boat and RV storage October through April

Location:

Middle of the Fairgrounds

Event Building #17

Facility Attributes:

- Indoor, Concrete Floor, No Heat
- 3,000 SF
- Total Capacity: 288



Event Building #17 (cont'd)

Primary Event Mix:

- Trade Shows
- Classrooms
- Small Gatherings
- Used for competitive exhibits during the Fair
- Used for storage October through April

Location:

Middle of the Fairgrounds



Source: Facility management.

Barn #10

Facility Attributes:

- Red Brick Paver Isle, Packed Gravel Floors
- 2,880 SF
- Not rented between October and April

Location:

Middle of Fairgrounds



Source: Facility management.

Building #15 - Draft Horse Barn

Facility Attributes:

- Dirt Floor, No Heat
- 7,200 SF

Primary Event Mix:

- Used for storage October through April

Location:

Middle of the Fairgrounds



Source: Facility management.

In addition to these facilities, there are several other barns and outdoor spaces that can be rented including grass areas and parking lots.

Fair Layout

The graphic below shows the layout for the 2021 Fair.

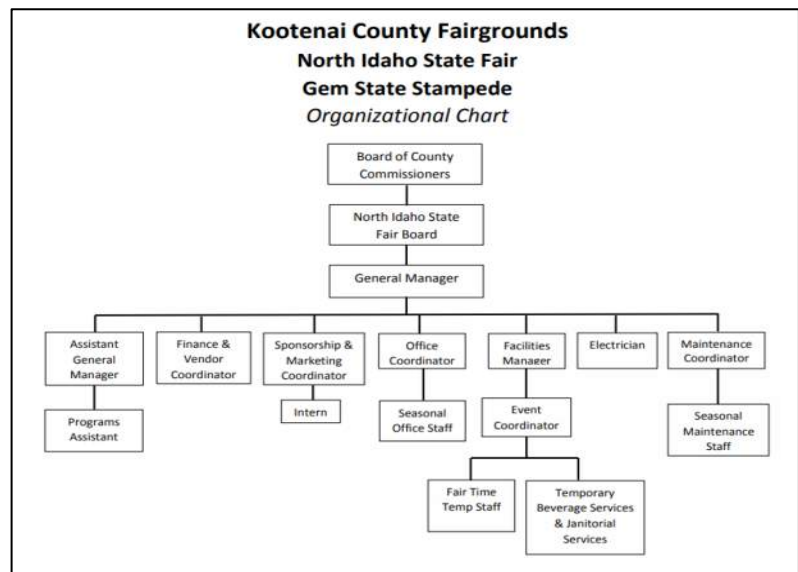
North Idaho State Fair Map



Source: Fair management.

Organizational Structure

The Fairgrounds is located on County-owned land. The Fair and the Fairgrounds are operated by the North Idaho State Fair Board which consist of seven (7) individuals. The Board acts in an advisory capacity to the Board of County Commissioners. Board members are appointed by the County Commissioners and serve four-year terms that are renewable. The adjacent graphic illustrates the current organizational chart.



Source: Facility management.

Booking Policy

It is important for a facility's booking policy to appropriately support and implement the mission statement through a consistent approach to prioritizing bookings. For instance, events that generate economic impact to the community may not result in positive financial performance for the facility, particularly given the competitiveness among fairgrounds/equine facilities and commercial arenas. As such, there is sometimes a conflict for the management team to balance hosting events that operate at a profit and positively impact the facility's financial performance and hosting events that do not necessarily contribute positive cash flow but meet broader programming and operating goals for the community. A well-defined mission statement and booking policy can help reduce the potential for perceived differences in the facility's role by various stakeholders. At this time, the Fairgrounds does not have a formal booking policy.

Rental Rate Structure

The adjacent table summarizes the rental rate structure at the Fairgrounds as of 2021. Most facilities are available for less than \$500/day. Facilities with the highest rental rates are considered primary buildings and include Findlay Arena, Buildings 1, 2 and 2 combined (main exhibit buildings) and the Jacklin Building. A 20% discount is available for non-profit organizations. Although offering discounted rates to organizations that support the mission is a common practice among fairgrounds operators, it can adversely impact the profitability of operations in some instances.

Summary of 2021 Rental Rates		
Facility	Daily Rate	Move In/Out Days
Findlay Arena (Arena & Grandstands for ticketed events)	\$1,750	\$525
Combo Buildings 1, 2, & 3	\$1,250	\$475
Findlay Arena (Arena & Grandstands for non-ticketed events)	\$1,250	\$375
Jacklin Event Building 25	\$1,100	\$475
Event Building 20 (Food Court)	\$1,000	\$200
South Midway	\$1,000	\$100
Findlay Arena (Arena Only)	\$750	\$225
Event Building 1	\$650	\$275
Silver Buckle Club	\$500	n/s
Event building 3	\$425	\$200
Building 14 A (Upper Club House)	\$425	\$125
Event Building 9	\$400	\$150
Event Building 10	\$400	\$150
Event Building 2	\$350	\$125
North Arena	\$350	\$75
Main Parking Lot	\$300	n/s
VIP Parking Lot	\$300	n/s
Main Midway	\$300	\$50
Event Building 19	\$275	\$125
North Midway	\$250	\$50
Draft Horse Barn	\$250	\$75
Building 14B (Space Under Grandstand)	\$200	\$75
Event Building 22 (Sheep Barn)	\$200	\$75
Jacklin Square	\$200	n/s
Event Building 17	\$200	\$75
Event Building 7	\$175	\$50
Event Building 4 (Stampede Room)	\$150	\$75
First Interstate Pavilion	\$150	\$50
Event Building 11	\$100	\$50
Event Building 12	\$100	\$50
Grass Area West of Building 7	\$50	n/s

Notes: Grounds includes all facilities on the Fairgrounds.

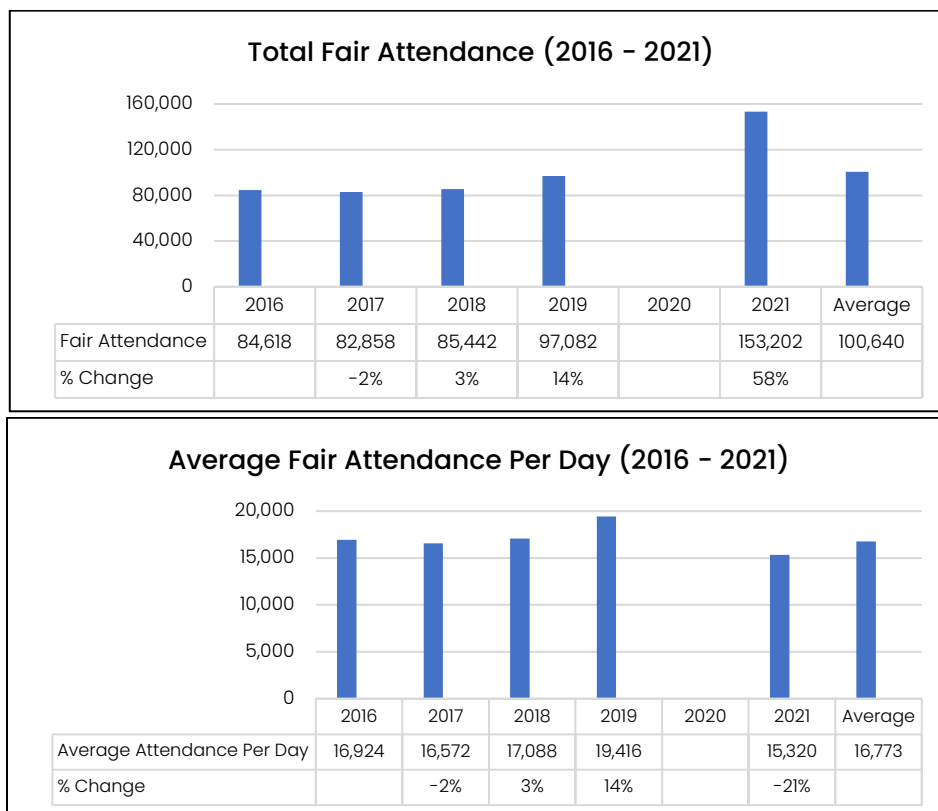
Sorted in descending order by daily rate.

Source: Facility Management.

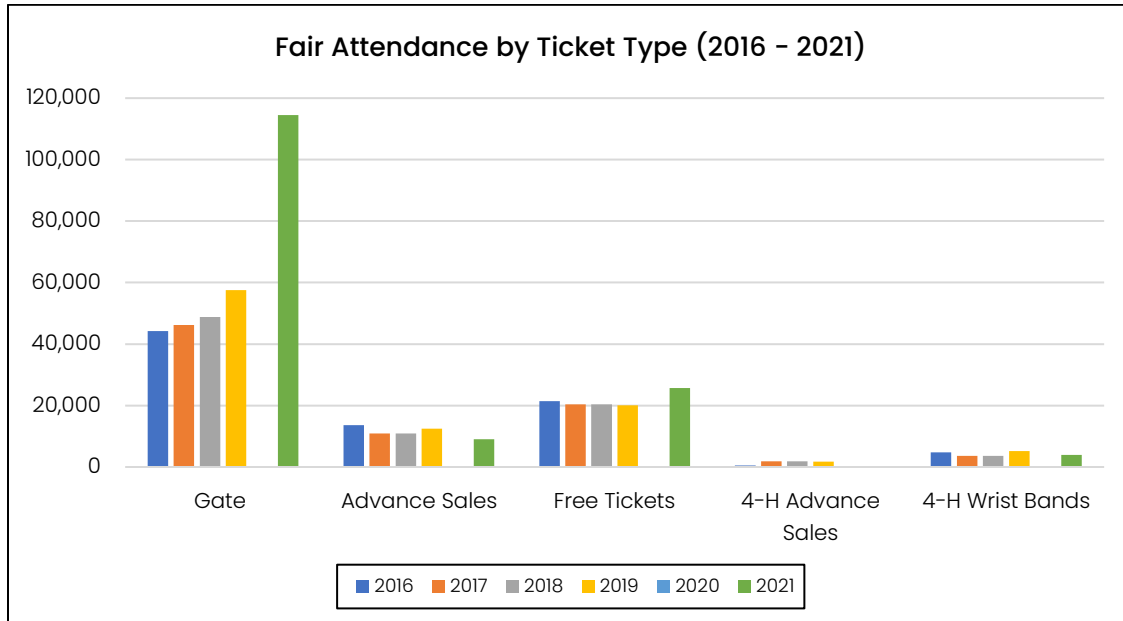
Historical Fair Attendance

The Fair has historically occurred over a five (5) day span starting in August on a Wednesday and ending on a Sunday. In 2021, the Fair ran for 10 days in an effort to increase overall attendance and reduce crowding.

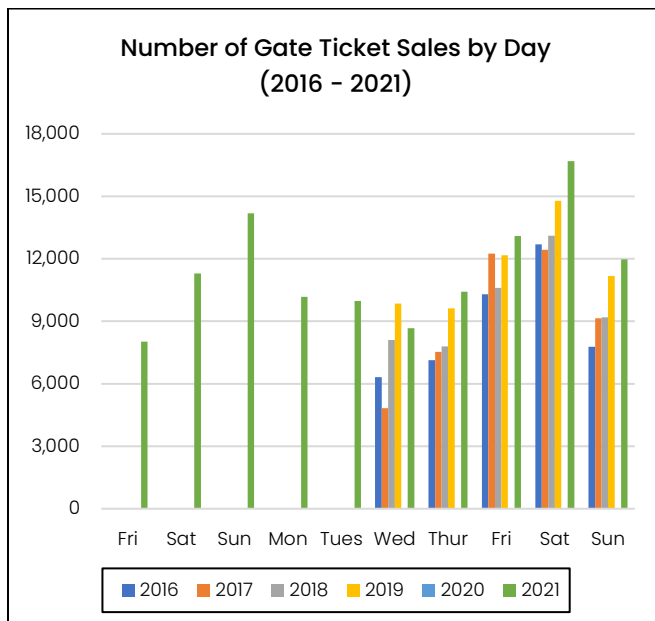
The charts below illustrate total Fair attendance and average Fair attendance per day from 2016 through 2021. In 2020, the Fair was cancelled due to the COVID-19 Pandemic. Total attendance at the Fair averaged approximately 100,600 during the profiled period, which was positively impacted by the record year of attendance in 2021 due to the increase in the Fair's length. Although Fair attendance decreased by 2% in 2017, it increased by 3% in 2018, 14% in 2019 and by 58% in 2021. During the profiled period, the Fair averaged approximately 16,770 in attendance per day. It should be noted factors such as weather conditions can impact attendance at fairs.



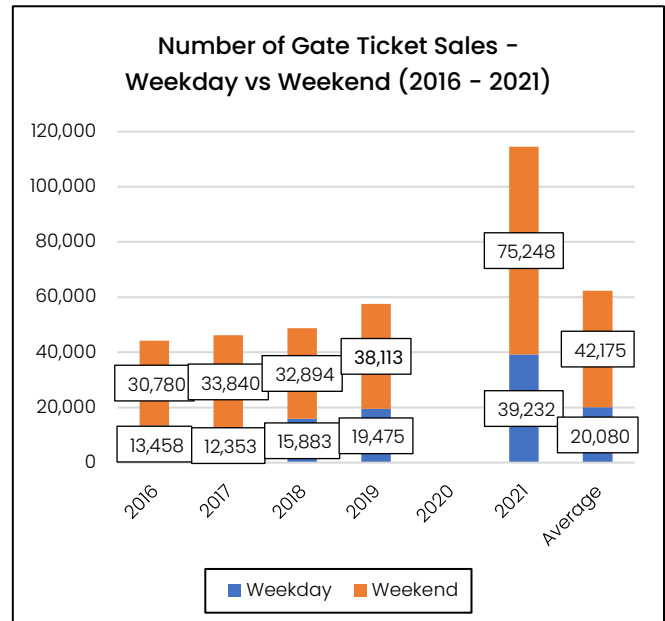
The chart that follows provides a breakdown of Fair attendance from 2016 through 2021 by ticket sales categories: Gate, Advance Sales, Free, 4-H Advanced Sales and 4-H Wrist Bands. The number of tickets bought at the gate increased each year during the profiled period and averaged 62% of total ticket sales during the profiled period. The number of free tickets has been relatively consistent, averaging approximately 21% of total ticket sales during the profiled period. Free tickets have generally been supplied to volunteers, commercial vendors, food vendors, and various sponsors, among others. Advance sales averaged approximately 11% of total ticket sales while those associated with 4-H averaged approximately 5% combined.



The charts below depict the number of Fair tickets sold at the gate by day from 2016 through 2021. Consistent with other fairs, gate ticket sales have historically peaked during the weekend (including Friday). Both weekday and weekend gate ticket sales increased each year other than in 2017 when weekday sales decreased by 8% and in 2018 when weekend sales decreased by 3%. As previously mentioned, weather conditions can impact Fair attendance.



Note: This chart only depicts tickets purchased at the gate.
Source: Facility management.



Notes: This chart only depicts tickets purchased at the gate.
Weekend attendance includes Fridays.
Source: Facility management.

Historical Non-Fair Event Activity at the Fairgrounds

The following table summarizes non-Fair event activity held at the Fairgrounds from 2015 through 2019 for which data was available at the time of this analysis. Event activity for 2017 is not shown as complete event data was not available for that year. Further, event activity is not shown for 2020 as this year is not considered to accurately represent historical performance due to the cancellation of many events resulting from the COVID-19 pandemic. Non-Fair event attendance has not historically been tracked.

As shown, non-Fair activity at the Fairgrounds has primarily consisted of social events, community events and expos. The number of non-Fair events was relatively consistent in 2015 and 2016 before increasing by 16% in 2018 and 21% in 2019. The increase in 2019 was primarily a result of hosting a higher number of dog trainings in that year. On average, community events have accounted for the largest number of event days which is primarily the result of hosting Heart of the City Church for 60 event days in 2016 and Toys for Tots (60 event days) and Santa's Tree Farm (32 event days) in 2019. During the profiled period, the Fairgrounds averaged 99 non-Fair events 234 event days. It should be noted that in addition to the events accounted for below, the Fairgrounds hosts year-round 4-H activity, Board and Foundation meetings, etc.

Summary of Non-Fair Utilization at the Fairgrounds												
Event Type	2015		2016		2017		2018		2019		Four-Year Average	
	Events	Event Days	Events	Event Days	Events	Event Days	Events	Event Days	Events	Event Days	Events	Event Days
Community	20	31	23	90			21	30	21	132	21	71
Sports	18	93	7	35			6	24	7	26	10	45
Expo	19	39	21	37			22	41	18	30	20	37
Social	18	18	16	16			30	31	29	29	23	24
Training	2	2	2	2			4	14	18	82	7	25
Horse Show	3	6	6	13			3	7	5	12	4	10
Meeting/Conference	2	2	5	7			5	5	9	12	5	7
Dog Show	2	4	2	4			2	4	4	7	3	5
Livestock	1	1	1	1			3	4	4	8	2	4
Concert/Festival	2	2	2	3			1	1	4	5	2	3
Family Show	1	1	1	1			2	3	1	1	1	2
Convention/Trade	0	0	0	0			1	1	1	1	1	1
Total	88	199	86	209			100	165	121	345	99	234

Notes: Complete event data for 2017 was not available.

Number of event days excludes move-in/move-out days.

Sorted in descending order by the four-year average number of event days.

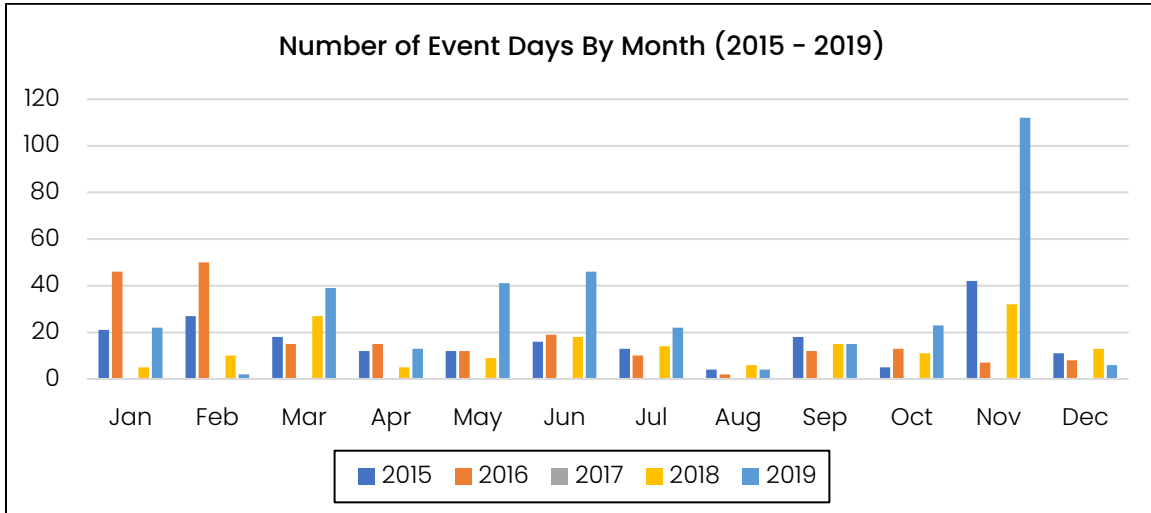
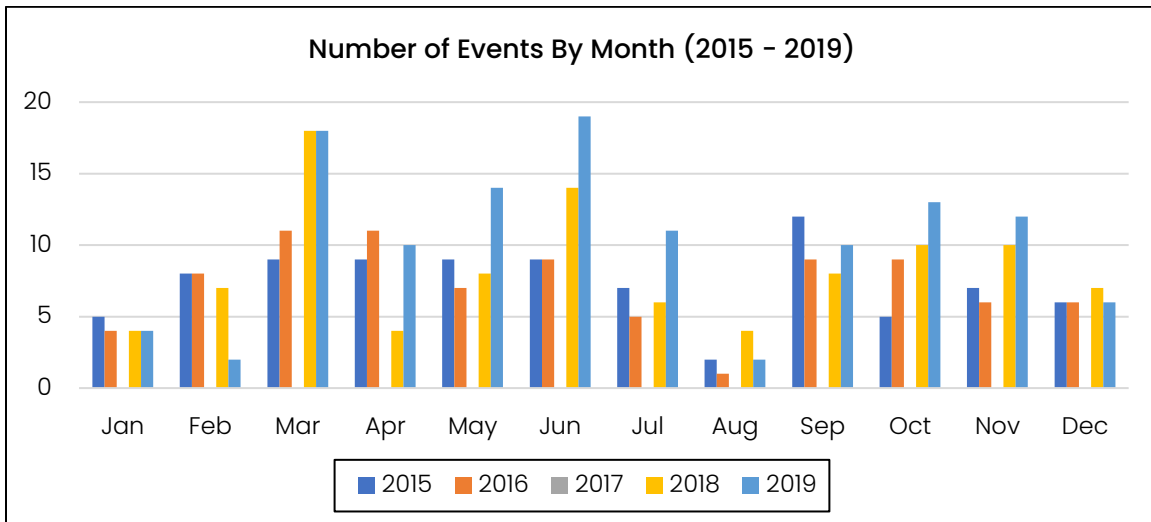
Source: Facility management.

Non-Fair Utilization - Percent of Total												
Event Type	2015		2016		2017		2018		2019		Four-Year Average	
	Events	Event Days	Events	Event Days	Events	Event Days	Events	Event Days	Events	Event Days	Events	Event Days
Community	22.7%	15.6%	26.7%	43.1%			21.0%	18.2%	17.4%	38.3%	21.2%	30.3%
Sports	20.5%	46.7%	8.1%	16.7%			6.0%	14.5%	5.8%	7.5%	10.1%	19.2%
Expo	21.6%	19.6%	24.4%	17.7%			22.0%	24.8%	14.9%	8.7%	20.2%	15.8%
Social	20.5%	9.0%	18.6%	7.7%			30.0%	18.8%	24.0%	8.4%	23.2%	10.3%
Training	2.3%	1.0%	2.3%	1.0%			4.0%	8.5%	14.9%	23.8%	7.1%	10.7%
Horse Show	3.4%	3.0%	7.0%	6.2%			3.0%	4.2%	4.1%	3.5%	4.0%	4.3%
Meeting/Conference	2.3%	1.0%	5.8%	3.3%			5.0%	3.0%	7.4%	3.5%	5.1%	3.0%
Dog Show	2.3%	2.0%	2.3%	1.9%			2.0%	2.4%	3.3%	2.0%	3.0%	2.1%
Livestock	1.1%	0.5%	1.2%	0.5%			3.0%	2.4%	3.3%	2.3%	2.0%	1.7%
Concert/Festival	2.3%	1.0%	2.3%	1.4%			1.0%	0.6%	3.3%	1.4%	2.0%	1.3%
Family Show	1.1%	0.5%	1.2%	0.5%			2.0%	1.8%	0.8%	0.3%	1.0%	0.9%
Convention/Trade	0.0%	0.0%	0.0%	0.0%			1.0%	0.6%	0.8%	0.3%	1.0%	0.4%
Total	100.1%	99.9%	99.9%	100.0%			100.0%	99.8%	100.0%	100.0%	99.9%	100.0%

Note: Sorted in descending order by the four-year average number of event days.

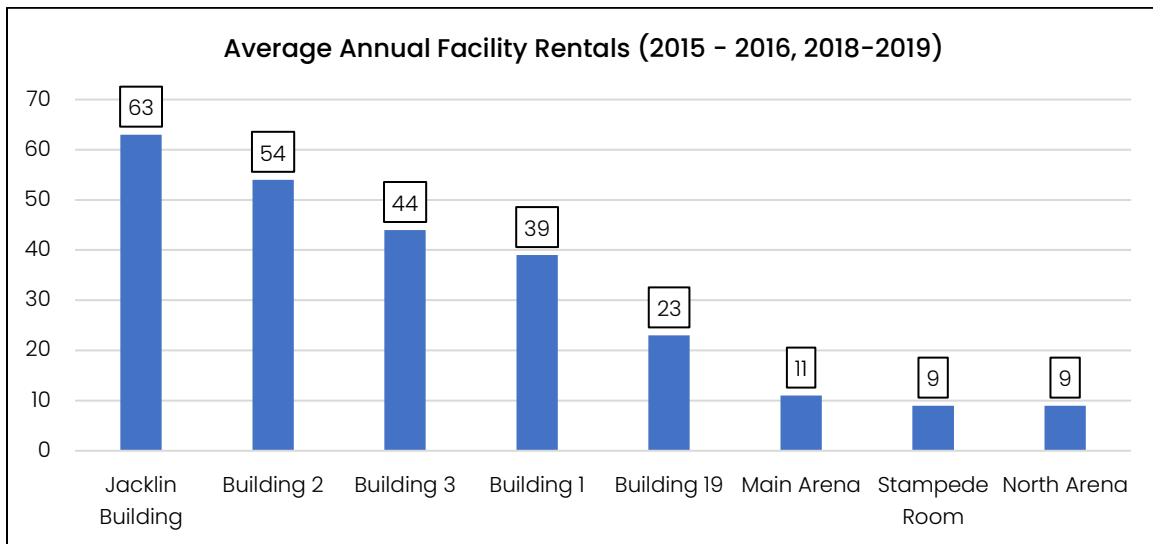
Source: Facility management.

The following charts summarize the number of non-Fair events and event days by month during the profiled five-year period. On average, the Fairgrounds hosted the highest number of events in March. The number of non-Fair events is significantly less in August because the Fairgrounds is closed for rentals during the Fair as well as for days associated with Fair set-up and clean-up. As previously mentioned, the large number of event days in November of 2019 is a result of hosting Toys for Tots and Santa's Tree Farm, which combined accounted for over 90 event days.



Notes: Event activity categorized into months by event start date.
Excludes 2017 as complete event data was not available.

The chart below summarizes the four-year average of non-Fair facility rentals for the primary event spaces on the Fairgrounds.



During the profiled period, the Jacklin Building was the most rented facility on the Fairgrounds, followed by Building 2, Building 3 and Building 1, respectively. Buildings 1, 2 and 3 can be rented together and utilized as one event space.

All other Fairgrounds event spaces such as the barns, midway, community 1st pavilion, etc., had limited non-Fair use during the profiled period. Several event spaces including Buildings 7, 9, 10, 11, 12, 15, 16, 17, 20, 22 and underneath the Grandstands are not available for year-round rental and are utilized as boat, RV, and trailer storage space from October through April.

The following table summarizes facility rentals in each of the primary spaces by event type during non-Fair time.

	Facility Rental by Event Type																																										
Facility	Jacklin Building					Building 2					Building 3					Building 1					Building 19					Main Arena					Stampede Room					North Arena							
Year	2015	2016	2017	2018	2019	2015	2016	2017	2018	2019	2015	2016	2017	2018	2019	2015	2016	2017	2018	2019	2015	2016	2017	2018	2019	2015	2016	2017	2018	2019	2015	2016	2017	2018	2019								
Sports	67	28		1	18	0	0		0	0	0	0		0	0	17	0		17	0	0	0	0	7	7		5	8	0	0		0	0	2	0		0	0					
Training	0	0		0	0	0	1		11	61	0	0		2	1	0	0		0	1	0	0	0	0	0	0		0	0	0	0	0	0	0		0	0						
Community	6	13		7	10	11	64		5	9	10	63		6	4	9	5		3	11	0	5	1	61	1	0		0	1	0	0	2	0		0	0	0	0					
Social	2	4		3	2	2	3		3	2	8	6		9	8	2	1		7	7	0	0		0	0	1	1		0	1	2	2		4	5	0	0		0	0			
Meeting/Conference	1	1		0	3	1	3		0	3	0	6		2	4	0	3		3	1	0	3		0	1	0	0		0	0	0	3		2	0		0	0					
Horse Show	0	0		0	0	0	0		0	0	0	0		0	0	0	0		0	0	0	0		0	0	0		2	0	0	0	0		0	0	4	13		7	8			
Dog Show	4	4		4	4	0	4		0	2	0	0		0	2	2	2		2	4	0	0		0	0	0		0	0	0	0	4	0		2	2		0	0		0	0	
Expo	24	17		9	9	3	8		7	8	7	11		11	13	9	13		19	11	3	4		7	5	0	0		1	1	0	1		4	3		0	0		0	0		
Concert/Festival	1	3		1	1	0	0		0	1	1	0		0	1	0	0		0	3	0	0		0	1	0	0		0	0	0	0		0	0		0	0		0	0		
Convention/Trade	0	0		1	1	0	0		0	0	0	0		0	0	0	0		0	0	0	0		0	0	0		0	0	0	0		0	0		0	0		0	0			
Livestock	0	1		1	0	0	0		0	0	0	0		0	0	1	0		0	1	0	0		0	0	0		0	0	0	0		4	0		0	0		0	0		0	0
Family Show	0	0		0	0	0	0		2	0	0	0		2	0	0	0		2	0	0	0		0	0	0		1	1		1	1	0	0		0	0		0	0		0	0
Total	105	71		27	48	17	83		28	86	26	86		32	33	40	24		53	39	3	12		8	68	12	9		7	16	6	6		14	10	6	13		7				

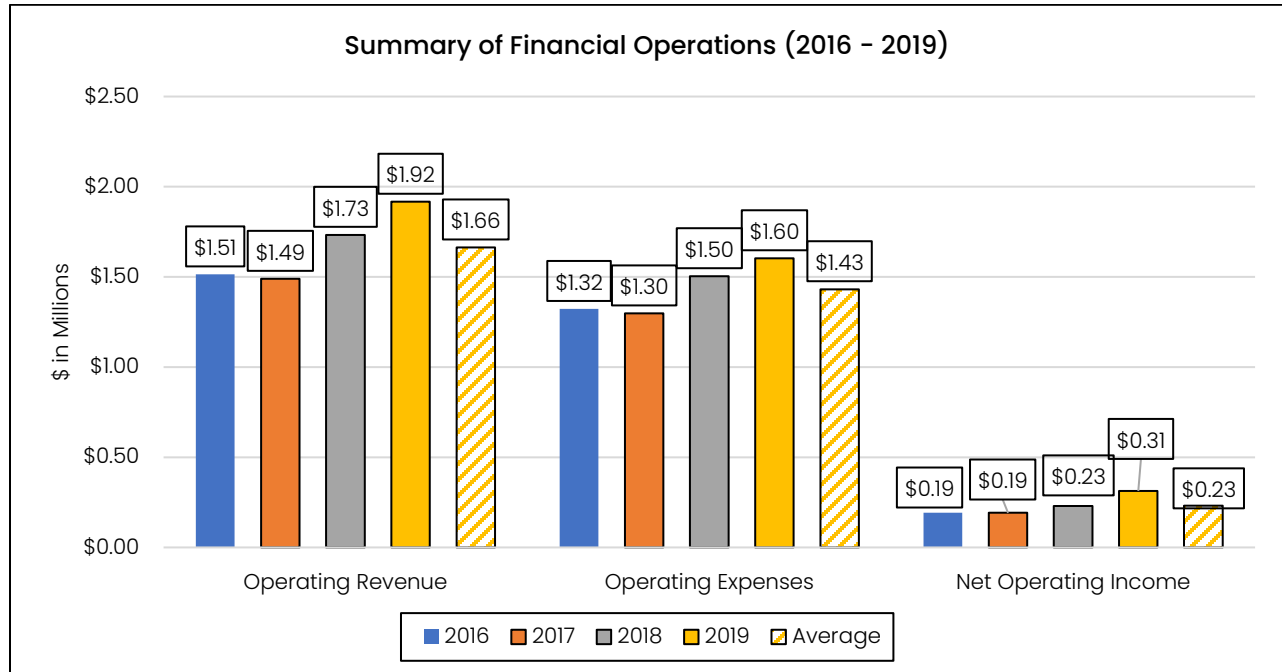
Note: Complete event data for 2017 was not available.

As shown in the table above, the following summarizes the primary uses of each facility.

- Jacklin Building – sports, expos, community events, dog shows, and social functions
- Building 2 – community events, trainings, and expos
- Building 3 – community events, expos, and social events
- Building 1 – expos, sports and community events
- Building 19 – community events and expos
- Main Arena – sports such as motocross
- Stampede Room – social events, dog shows and expos
- North Arena – horse shows

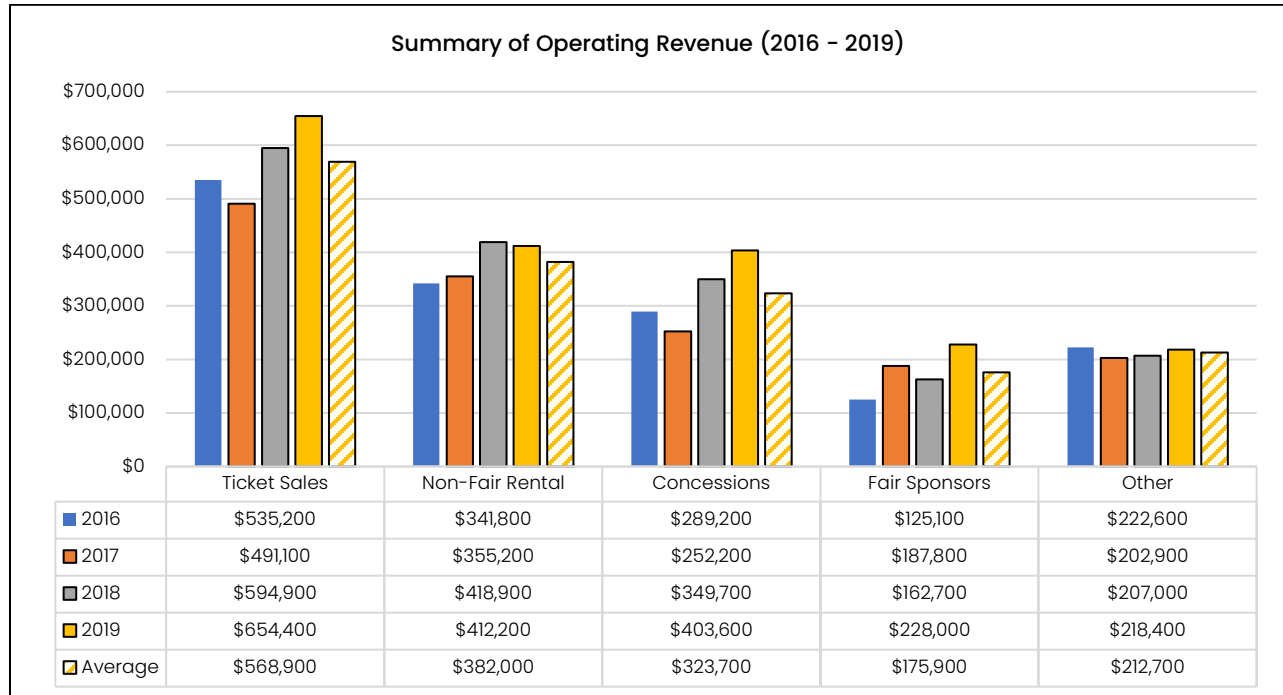
Historical Financial Operations

This section provides a high-level financial overview of Fairgrounds' operations for 2016 through 2019. During the profiled four-year period, the Fairgrounds generated a net operating profit that ranged from approximately \$191,700 to \$313,300 and averaged \$231,500. The Fairgrounds averaged \$1.66 million in operating revenue and \$1.43 million in operating expenses. Both operating revenue and operating expenses increased annually from 2017 through 2019. Operating revenue increased by 16% in 2018 and again by 11% in 2019. Operating expenses increased by 16% in 2018 and by 7% in 2019.



Notes: Amounts are rounded.
Excludes non-operating revenues and expenses.
Source: Facility management.

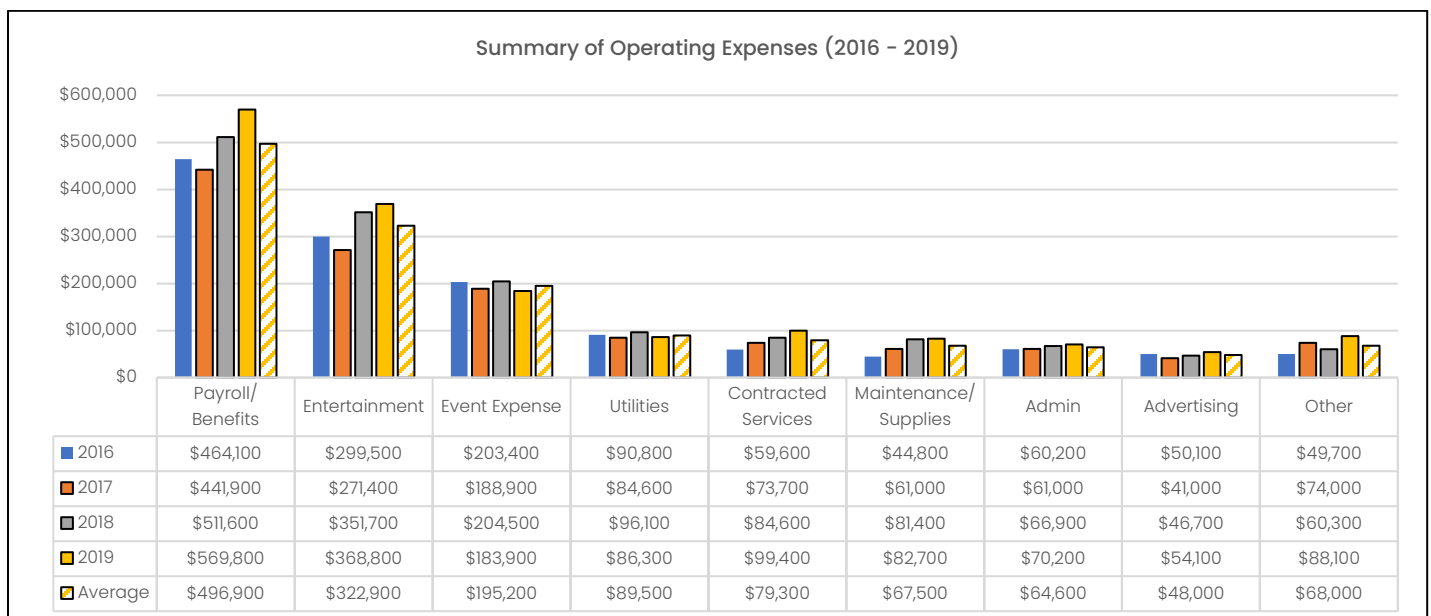
The following chart shows operating revenue from 2016 through 2019 by major line item. Most revenue is derived from Fair operations. Revenues from Fair ticket sales and concessions increased each year from 2017 through 2019. Non-Fair rental revenue increased each year from 2016 to 2018 before experiencing a slight decline in 2019. Fair sponsorship revenues fluctuated during the profiled period and averaged approximately \$175,900. Other revenue, which includes parking, vendor booths, entries/competitive exhibits and other miscellaneous revenues remained relatively consistent during the profiled period and averaged \$212,700.



Notes: Amounts are rounded.
Excludes non-operating revenues.

Source: Facility management.

On average, operating expenses related to payroll/benefits, entertainment, and general event expenses accounted for the majority of total expenses during the profiled period. Both payroll/benefit and entertainment expenses increased from 2017 through 2019 while general event expenses remained relatively consistent.



Notes: Amounts are rounded.
Excludes non-operating expenses.

Source: Facility management.

Key Observations

The following summarizes key observations related to Fairground operations.

- Fair attendance has trended upward in recent years and generated average per day attendance of approximately 16,770 from 2016 through 2021.
- In addition to the Fair, the Fairgrounds host diverse event activity primarily consisting of social events, community events and expos.
- Historically, the Jacklin Building has been the most rented facility on the Fairgrounds, followed by Building 2, Building 3, and Building 1. Many of the facilities on the Fairgrounds such as the barns, midway, community 1st pavilion, etc. have limited non-Fair use. Several of the event facilities, including but not limited to, Buildings 7, 9, 10, 11, 12, 15, 16, 17, 20, 22 and underneath the Grandstands are used as storage from October through April and not available for rent.
- Most of the facilities on the Fairgrounds have a daily rental rate less than \$500.
- The Fairgrounds has generated a net operating profit ranging from \$191,700 to \$313,300 from 2016 through 2019. Most operating revenue is derived from Fair operations. Most operating expenses are related to payroll/benefits, Fair entertainment and general event expenses.
- Overall, it appears the Fairgrounds is home to a successful Fair as well as diverse non-Fair activity and is operated in a fiscally responsible manner.

4. COMPETITIVE LANDSCAPE



COMPETITIVE LANDSCAPE

In addition to optimizing Fair operations, improvements to the Fairgrounds are envisioned to further enhance its ability to host year-round event activity that is appealing to both residents and out-of-town visitors. As such, it is important to understand the existing supply of event facilities in the area in terms of building program and market niche. Factors such as geographic location, building program elements and market focus impact how competitive facilities are, and may be in the future, to the Fairgrounds. While the pages that follow provide a brief description of select local facilities, it is not meant to be an all-inclusive inventory.

Area Entertainment/Meeting/Sports Facilities

The following provides a description of area entertainment, meeting and sports facilities that accommodate similar event activity to that at the Fairgrounds.

Settlers Creek

Settlers Creek is a historic 10-acre farm located 4.5 miles from downtown Coeur d'Alene. The venue specializes in full-service hosting of private events such as weddings, corporate conferences, parties, team building activities, private concerts, and other special events. There are multiple event spaces including a 1,000 SF hill-top gazebo, three grass terraced amphitheaters ranging from 3,500 to 11,000 SF, grass lawns, a 7,000+ SF event tent and several common areas with original farm structures.



Photo Credit: Facility Website.

The Estate at Elk Point

The Estate at Elk Point in Coeur d'Alene hosts many different event types including weddings, birthdays, anniversaries, meetings, trainings, retreats, fundraisers and concerts. The venue has a capacity of 175 persons and offers outdoor space as well as an indoor event pavilion.



Photo Credit: Facility Website.



Coeur d'Alene Casino Resort Hotel

The Coeur d'Alene Casino Resort Hotel is in Worley, which is approximately 25 miles from Coeur d'Alene. Facilities include 300 rooms and suites, seven different food and beverage outlets, a 60,000 SF casino, a 15,000 SF luxury spa and an 18-hole, 72-par golf course. The venue also has over 40,000 SF of meeting and convention space with a capacity of 1,200 people.



Photo Credit: Visit Coeur d'Alene and Facility Website.



Coeur d'Alene Resort

The Coeur d'Alene Resort, located on the north shore of Lake Coeur d'Alene, has several facilities and amenities including a golf course, spa, event rooms, marina, fitness center, pools, shops and restaurants in addition to 338 guest rooms. The event rooms offer more than 32,000 SF of conference, exhibit and meeting space. The Coeur d'Alene Resort completed a full renovation and upgrade in 2018.



Photo Credit: Facility Website.



Salvation Army Kroc Center



Located in Coeur d'Alene on 12 acres, the 132,000 SF Salvation Army Kroc Center is a community center offering a competition pool, leisure pool, a 14,000 SF multi-purpose gym, group exercise studios, a track and fitness area, a climbing wall, a 2,151 SF performing arts theater and other amenities. The multi-purpose gym can be used for various sports including basketball, pickleball, indoor soccer, etc. and hosts camps, classes, and other community events. The performing arts theater features seating for 400 and can host small to medium performance events, concerts and theater productions.

Photo Credit: Facility website.

Spokane Arena

Opened in 1995, the Spokane Arena is owned and operated by the Spokane Public Facilities District. The facility has a seating capacity of approximately 11,700 for basketball and concerts depending on the configuration. The arena floor is 32,000 SF when all retractable seating is retracted. The arena also has a 35,000 SF concourse, five covered loading docks, 10 backstage rooms, a 550 SF green room, fitness center, an 1,800 SF meeting room that is divisible into two rooms and a 4,500 SF Champions/Press room. The arena bowl can be reconfigured and downsized with a curtaining system into the Star Theatre that offers 5,900 seats for smaller, more intimate concert space. The facility is home to the Spokane Shock of the Indoor Football League as well as the Spokane Chiefs of the Western Hockey League. In addition, the venue hosts concerts, family shows, major sports tournaments/competitions and other events.



Photo Credits: Facility website.

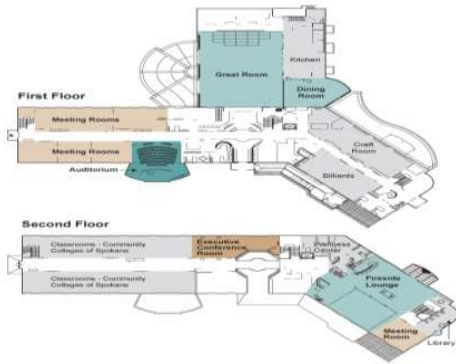
McCarthy Athletic Center



The McCarthy Athletic Center is a 6,000-seat facility located on the campus of Gonzaga University in Spokane. Opened in 2004, the facility is home to the men's and women's basketball programs. The facility hosted the first and second rounds of the Division I Women's Basketball Tournament in 2011, 2012 and 2013 as well as various concerts and comedy acts.

Photo credit: Gonzaga University website.

CenterPlace Regional Event Center



Located in Spokane, the CenterPlace Regional Event Center hosts conferences, business meetings, banquets, community events, musical entertainment, weddings and senior activities. The venue offers 54,000 SF of event space including meeting rooms, banquet facilities, an auditorium and other pre-function and support spaces. The facility offers over 400 free parking spaces.

Photo Credit: Facility website.

Spokane Valley Event Center

Spokane Valley Event Center has a capacity of 450 people for banquets and 750 people for auditorium style. The venue has a kitchen and an on-site catering team as well as full audio and visual capabilities. The primary event mix at the facility includes corporate events, social events, weddings and receptions. The venue offers 350 parking spaces.

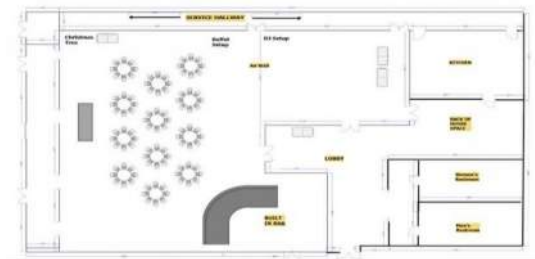


Photo Credit: Facility Website.

Riverside Place

Riverside Place, which is in downtown Spokane, consists of a banquet room with a capacity of 400 people, a ballroom that can seat 450 people, the Commandery Room with a capacity of up to 550 and an auditorium with a capacity of 1,200. The venue hosts weddings, banquets, small concerts, corporate events and other social events.



Photo Credit: Facility Website.

Montvale Event Center

The Montvale Event Center, which is at the historic Odd Fellows Building in Spokane, consists of three multi-functional floors. The first floor has a 3,500 SF event hall with a kitchen and bar. The second floor includes Ella's Theater and Lounge which offers nearly 6,000 SF of event space. The third floor of the event center features Ella's Supper Club, a 2,500 SF event space consisting of a ballroom, bar, sitting area and restrooms. Each floor of the Montvale Event Center can accommodate up to 240 guests. The venue hosts receptions, meetings, parties, seminars and other events.

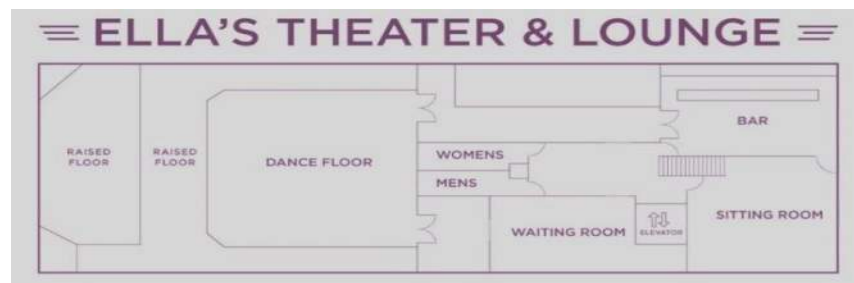
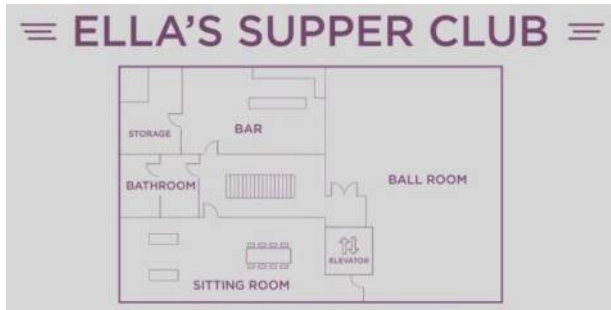


Photo Credit: Facility Website.

Talbott Event Center

The Talbott Event Center in Spokane is a 13,000 SF meeting and event venue. The venue has seven individual rooms that vary in size ranging from 644 SF to 3,478 SF. The facility has a maximum capacity of approximately 500 people. All spaces feature integrated meeting technology and flexible room design with access to a kitchenette.

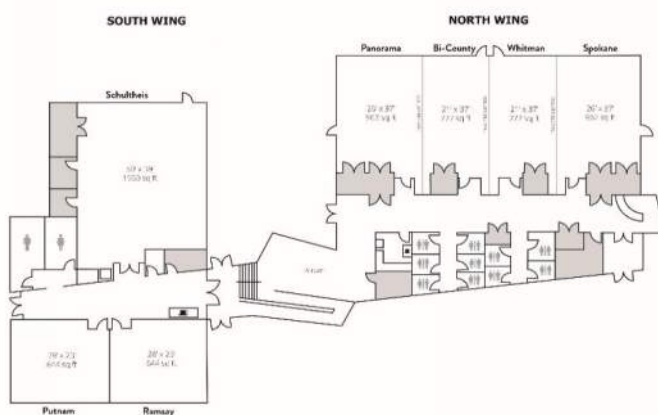


Photo Credit: Facility Website.

Spokane Convention Center

Recently expanded in 2015, the Spokane Convention Center has more than 300,000 SF of event space including a 120,000 SF exhibit hall, three ballrooms and the flexibility to offer 40 breakout spaces. Other spaces at the facility include the 270-seat Conference Theater as well as an Executive Boardroom, a Roof Deck and Riverside Terrace that can each host up to 500 people. The Spokane Convention Center is owned and operated by the Spokane Public Facilities District.



Photo Credit: Facility Website.

HUB Sports Center

The HUB Sports Center in Liberty Lake, Washington features 66,670 SF of event space including five full-size basketball courts, reception and greeting areas, concessions and three large studios. Hub Sports Center has hosted major tournaments such as the National Association of Intercollegiate Athletics Volleyball Regional Tournament, USA Boxing National Championships, USA Judo Youth & Scholastic National Championships, among others.

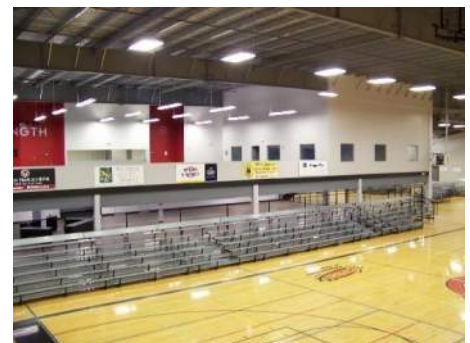


Photo Credit: Facility Website.

Southridge Sports Complex

Located in Kennewick, Washington, the Southridge Sports Complex is a 52-acre multi-sports development that features four baseball/softball fields, two multi-use fields and several indoor buildings offering meeting and event space. Additionally, the complex houses the indoor sports pavilion (30,000 SF) which can be used for both sporting activities and other flat-floor events.



Photo Credit: Facility Website.



The Podium

The Podium is a new indoor sports complex in downtown Spokane. The 135,000 SF facility, which is owned and operated by the Spokane Public Facilities District, includes 75,000 SF of competition space, a 200-meter banked hydraulic track, nine (9) basketball courts, 16 volleyball courts, 21 wrestling mats and seating for up to 4,000 spectators. The venue, which is located across from the Spokane Arena, is capable of hosting multiple sporting events and is scheduled to host the 2022 USA Track & Field (USATF) Indoor Championships.



Photo Credit: Facility Website.



Area Fairground/Equine Facilities

There are multiple fairgrounds and equine/livestock facilities in the area. The following facilities were profiled based on factors such as utilization and geographic proximity to the Fairgrounds. These profiled facilities have historically hosted expos, sporting events, horse shows, holiday events, meetings, trainings, markets, food truck nights, banquets, weddings, rodeos, etc.

Supply of Area Fairgrounds/Equine Facilities					
Facility	Kootenai County Fairgrounds	Bonner County Fairgrounds	Lewiston Roundup Grounds	Nez Perce County Fairgrounds	
Location	Coeur d'Alene, ID	Ponderay, ID	Lewiston, ID	Lewiston, ID	
Program Elements					
Site Size (acres)	83	39	80	27	
Indoor Arena (number)	0	1	1	0	
Indoor Arena (SF of largest)	n/a	n/s	23,000	n/a	
Covered Arena (number)	0	0	0	0	
Outdoor Arena (number)	2	1	1	1	
Warm Up Arena (number)	1	1	2	1	
Stalls (number)	80	92	100	n/s	
RV Hookups (number)	28	33	40	98	
Exhibition Facility	Yes	Yes	No	Yes	
Banquet/Meeting Facility	Yes	No	No	No	
Facility	Grant County Fairgrounds	Spokane County Fair and Expo Center	Missoula County Fairgrounds	Creston Equine Center	Average (excludes Kootenai County Fairgrounds)
Location	Moses Lake, WA	Spokane Valley, WA	Missoula, MT	Creston, WA	
Program Elements					
Site Size (acres)	127	97	48	n/s	70
Indoor Arena (number)	2	1	0	1	1
Indoor Arena (SF of largest)	35,500	23,750	n/a	14,400	24,163
Covered Arena (number)	0	0	0	0	0
Outdoor Arena (number)	1	2	1	0	1
Warm Up Arena (number)	2	2	0	0	1
Stalls (number)	300	199	n/s	18	142
RV Hookups (number)	300	75	n/s	n/s	109
Exhibition Facility	Yes	Yes	Yes	No	
Banquet/Meeting Facility	Yes	Yes	Yes	No	

Note: Missoula County adopted a plan to redevelop the Fairgrounds in 2016 and has started a phased approach to implementation.

Source: Individual facility websites.

The acreage of the Fairgrounds is 19% larger than the average of the profiled facilities. Most of the profiled facilities have an indoor arena that can host diverse event activity. An indoor, climate-controlled arena can be a competitive advantage for facilities, especially those operating in adverse weather conditions such as snow, rain, heat, etc. The Fairgrounds' supply of stalls and RV spaces is 44% and 74% less, respectively, than the average for the profiled area facilities for which data was available.

While it is important to offer traditional elements of livestock and equine facilities such as arenas/rings and stalls, it is not enough to attract, retain and grow business. The combination of these elements is also important, particularly with regards to the physical layout and connectivity.

Several of the profiled facilities have developed master plans in recent years or are in the process of evaluating the merits of expanding/renovating to better serve their constituents and further enhance their market position. The following provides an overview of relevant planning efforts by select profiled facilities.

- Grant County Fairgrounds has begun the process of remodeling their campgrounds to adapt to changes in the design of recreational vehicles.
- Spokane County Fair and Expo Center has consistently looked to improve its facilities over the years with recent improvements/considerations including, but not limited to, new food courts, entry ways, replacing the grandstand and expanding the Expo Center by approximately 32,000 SF. The proposed expansion of the Expo Center is anticipated to include exhibit space, a lobby and a restaurant/brewery.
- Missoula County adopted a plan to redevelop the Missoula County Fairgrounds in 2016. The plan consists of two phases, with the first phase including utility extensions, renovations to historic buildings, a new maintenance shop, a new learning center, new landscaping, 10 acres of new open space, and other improvements. Phase two includes a new livestock center, rodeo arena, ice rink and exhibit center.

In addition to these facilities, there are several fairground facilities in the State that host a relatively large annual fair including Eastern Idaho State Fair and Western Idaho Fair. In 2019 Eastern Idaho State Fair and Western Idaho Fair drew attendance of approximately 247,950 and 250,050, respectively. While these facilities are not proximate to the Fairgrounds and are not considered to be directly competitive, their fairs generally run around the same time of year to that of North Idaho State Fair and provide options for residents and visitors looking to attend a fair in the State.

Key Observations

The Fairgrounds is a unique asset within the local market area. The size and diversity of facilities (both indoor and outdoor) on the Fairgrounds is an advantage in terms of hosting larger events, as well as simultaneous events, in comparison to other existing facilities in the County which are primarily focused on small gatherings/events such as banquets, meetings, conferences, retreats, weddings, etc.

Outside of the County, there are several facilities that host diverse event types, particularly in Spokane. These facilities present strong competition for the Fairgrounds in terms of attracting non-local events including large concerts, sporting events, festivals, conferences, tradeshow and family shows. Further, in comparison to the existing supply of fairground/equine facilities in the area, the Fairgrounds appears to be at a competitive disadvantage in terms of attracting certain event activity such as equine events and RV rallies given the lack of an indoor arena and relatively limited number of stalls and RV spaces. Further, the quality and size of the stalls at the Fairgrounds negatively impacts its marketability for equine events.

5. PEER FACILITY ANALYSIS



PEER FACILITY ANALYSIS

This section compares the Fairgrounds to peer facilities for benchmarking purposes. While providing useful data, benchmarks still only serve as a guide. Factors such as building program/configuration, market conditions and the competitive environment vary among venues and impact operations. While not perfect, data from similar facilities can provide a frame of reference related to program and operations.

The facilities depicted below were selected based on their geographic location as well as their similarities to the Fairgrounds in terms of size, owner/operator, event activity, etc. Kootenai County Fairgrounds is also depicted for geographic comparative purposes.



Source: Google maps.

Owner/Operator

Most profiled peer facilities are owned and operated by a county. Both Kootenai County and Twin Falls County have created governmental component units that oversee operations of the fairgrounds. Benton County leases the fairgrounds to the Benton Franklin Fair Association one month per year to produce the fair.

Profiled Peer Facilities – Owner/Operator			
Facility	Location	Owner	Operator
Benton County Fairgrounds	Kennewick, WA	County	County
Grant County Fairgrounds	Moses Lake, WA	County	County
Kootenai County Fairgrounds	Coeur d' Alene, ID	County	Fair Board
Spokane County Fair and Expo Center	Spokane, WA	County	County
Twin Falls County Fairgrounds	Filer, ID	County	Fair Board
Walla Walla County Fairgrounds	Walla Walla, WA	County	County
Westside Commons	Hillsboro, OR	County	County

Note: Sorted alphabetically.

Market Attributes

The table below summarizes select market attributes within a 120-minute drive of each profiled facility. As shown, market attributes associated with the Fairgrounds are relatively consistent with the median of all other profiled peer facilities with the exception of age. The median age within the 120-minute drive of the Fairgrounds is older than that of all profiled markets associated with peer facilities.

Peer Facilities – Select Market Attributes									
Facility	Location	120-Minute Drive Time							
		Population	Rank	Average Household Income	Rank	Median Household Income	Rank	Median Age	Rank
Westside Commons (Washington County Fair)	Hillsboro, OR	3,504,370	1	\$96,418	1	\$71,787	1	38.6	6
Grant County Fairgrounds	Moses Lake, WA	1,345,924	2	\$77,060	3	\$56,833	3	35.7	4
Spokane County Fair and Expo Center	Spokane, WA	1,049,511	3	\$74,844	6	\$54,778	6	38.5	5
Kootenai County Fairgrounds	Coeur d' Alene, ID	957,252	4	\$75,192	5	\$54,862	5	39.1	7
Benton County Fairgrounds	Kennewick, WA	913,648	5	\$75,510	4	\$56,639	4	34.3	1
Walla Walla County Fairgrounds	Walla Walla, WA	660,224	6	\$78,017	2	\$57,970	2	34.8	2
Twin Falls County Fairgrounds	Filer, ID	430,770	7	\$70,236	7	\$52,212	7	34.9	3
Average (Excludes Kootenai County Fairgrounds)		1,317,408		\$78,681		\$58,370		36.1	
Median (Excludes Kootenai County Fairgrounds)		981,580		\$76,285		\$56,736		35.3	

Note: Sorted in descending order by population.

Source: Esri.

Building Program Attributes

The table below compares select building program attributes at the Fairgrounds to the profiled peer facilities for which data was available. It is important to note that this information only illustrates the amount of space, not the physical condition or quality of the space.

Profiled Peer Facilities – Overview of Select Program Elements																
									Largest Contiguous Indoor Exhibit							
Facility	Acreage	Rank	Grandstand Capacity	Rank	Number of Indoor Arenas	Rank	Arena Floor SF	Rank	Space	Rank	Total Parking	Rank	Hookups	Rank	Total Stalls	Rank
Benton County Fairgrounds	129	1	6,000	1	0	4	n/a	n/a	15,000	5	3,000	4	103	4	320	1
Grant County Fairgrounds	127	2	5,264	2	2	1	35,500	1	12,000	6	n/s	n/s	300	1	300	2
Kootenai County Fairgrounds	83	6	2,919	6	0	4	n/a	n/a	16,500	4	4,000	2	28	6	80	4
Spokane County Fair and Expo Center	97	5	5,000	3	1	2	23,750	2	78,145	1	4,000	2	75	5	199	3
Twin Falls County Fairgrounds	120	3	3,600	4	0	4	n/a	n/a	9,600	7	n/s	n/s	180	2	n/s	n/s
Walla Walla County Fairgrounds	80	7	3,175	5	1	2	19,680	3	33,600	3	2,000	5	180	2	n/s	n/s
Westside Commons	101	4	n/a	n/a	0	4	n/a	n/a	39,250	2	6,000	1	14	7	n/s	n/s
Average (Excludes Kootenai County Fairgrounds)	109		4,608		1		26,310		31,266		3,750		142		273	
Median (Excludes Kootenai County Fairgrounds)	111		5,000		1		23,750		24,300		3,500		142		300	

Sources: IAFE Directories; Secondary sources.

As shown, the Fairgrounds is one of the smallest in terms of acreage; has a smaller grandstand capacity; and less stalls and RV hookups. The acreage of the Fairgrounds combined with the landlocked nature of the site is a challenge and exacerbates the importance of master planning.

The average number of indoor arenas at the profiled peer facilities is one (1). As previously mentioned, the lack of an indoor arena at the Fairgrounds may limit the type and amount of non-Fair activity hosted. Further, the largest contiguous indoor exhibit space at the Fairgrounds is smaller than the average and median of all other profiled peer facilities.

Spokane County Fair and Expo Center offers over 78,000 SF of contiguous indoor exhibit space throughout five (5) divisible event spaces. The space can accommodate one large event or five (5) separate events. As previously mentioned, Spokane County is considering expanding the Expo Center by 32,000 SF to create flexibility to host events requiring breakout rooms.

Westside Commons, which is in Hillsboro, Oregon and home to the Washington County Fair, offers the second largest indoor exhibit space. Construction on the Wingspan Event and Conference Center was completed in 2020. The facility was designed to host diverse needs of the community as well as enhance the Washington County Fair. The facility offers a divisible 39,250 SF expo hall, a conference room and three (3) meeting rooms.

Although yet to be built, Twin Falls County Fair completed a feasibility study in 2016 which recommended the development a new events center with a seating capacity of approximately 5,000 as well as an adjacent 37,500 SF indoor arena.

Fair Attendance

The following table summarizes fair attendance at each of the profiled peer facilities from 2017 through 2019 (prior to COVID-19). As shown below, North Idaho State Fair is one of the few fairs that experienced an increase in attendance from 2017 to 2018 as well as from 2018 to 2019. During the profiled three-year period, North Idaho State Fair averaged approximately 88,500 in total attendance and 17,700 in attendance per day which both ranked 4th among profiled peer facilities.

Profiled Peer Facilities – Fair Attendance (2017 – 2019)												
Fair	2017			2018			2019			Three-Year Average		
	Days	Attendance	Average Per Day	Days	Attendance	Average Per Day	Days	Attendance	Average Per Day	Days	Attendance	Average Per Day
Washington County Fair	4	112,075	28,019	4	86,366	21,592	4	89,000	22,250	4	95,814	23,953
Benton Franklin Fair	5	119,930	23,986	5	116,219	23,244	5	119,101	23,820	5	118,417	23,683
Spokane County Interstate Fair	10	178,270	17,827	10	205,997	20,600	10	206,615	20,662	10	196,961	19,696
North Idaho State Fair	5	82,858	16,572	5	85,442	17,088	5	97,082	19,416	5	88,461	17,692
Walla Walla Fair & Frontier Days	5	n/s		6	84,000	14,000	5	85,184	17,037	5	84,592	15,380
Grant County Fair	5	68,500	13,700	5	77,084	15,417	5	85,504	17,101	5	77,029	15,406
Twin Falls County Fair	6	88,000	14,667	6	76,000	12,667	6	74,000	12,333	6	79,333	13,222
Average (Excludes North Idaho State Fair)	6	113,355	18,893	6	107,611	17,935	6	109,901	18,840	6	108,691	18,533
Median (Excludes North Idaho State Fair)	5	112,075	17,827	6	85,183	18,009	5	87,252	18,882	5	90,203	17,551

Note: Sorted in descending order by three-year average attendance per day.

Source: IAFE Directories.

Non-Fair Event Activity

The profiled peer facilities vary in their method of tracking non-fair event activity and most facilities do not track non-Fair attendance. Non-Fair event activity at the profiled peer facilities (for which data was available) generally ranges from 50 to 600 events and averages approximately 210. When excluding the peer facility that hosts approximately 600 non-Fair events, the average decreases to approximately 130. Event activity at profiled peer facilities includes equine competitions, sporting events, livestock, markets, RV rallies, parties, etc. Based on activity at profiled peer facilities, it appears there may be an opportunity for the Fairgrounds to potentially host more non-fair events, particularly with enhanced and/or new facilities. With that said, factors including, but not limited to, market attributes, competition from area facilities and the physical condition of existing buildings/structures impact the amount of non-Fair event activity hosted.

Financial Operations

Similar facilities throughout the U.S. commonly operate at a deficit and many receive government subsidies to help offset operating deficits. Financial reporting differs among the profiled peer facilities. Many facilities do not segregate financial operations by Fair and non-Fair in their financial reporting. A common challenge among fairgrounds is how to allocate costs, such as utilities, among buildings. In addition, weather conditions can significantly impact fair operations in any given year. While it is difficult to directly compare certain financial operating statistics, general comparisons can be made.

Total operating revenue at the profiled peer facilities ranged from \$1.2 million to \$4.1 million in FY 2019. Total operating expenses ranged from \$1.3 million to \$4.1 million. The operating profit/loss at profiled peer facilities ranged from a loss of \$1.8 million to a profit of \$10,000. Most profiled peer facilities realized an operating deficit in FY 2019. As previously shown, the Fairgrounds generated an operating profit from 2016 through 2019 ranging from approximately \$192,000 to \$313,000. Historical financial operations of the North Idaho State Fair/Kootenai County Fairgrounds compare favorably to peer facilities.

6. INPUT FROM USER GROUPS



OVERVIEW

This section summarizes input obtained from existing and potential user groups. These event producers/organizers reflect a representative sample of user groups. Existing users were contacted to gauge what potential improvements could be made to either enhance their existing event's marketability and/or increase the likelihood of bringing more events to the Fairgrounds. Potential users were asked what improvements are needed at the Fairgrounds to attract their event(s). The input was generally categorized into the following market segments: concert/entertainment/family shows, sporting events, equine/livestock/agriculture, rodeo/bull riding and exhibit/expo/meeting events. The following summarizes the input obtained from these event producers.

Concert/Entertainment/Family Shows

Concert/entertainment/family show event promoters indicated that Coeur d'Alene has a relatively small population base despite its recent growth. In addition, there is an established existing supply of entertainment venues in larger surrounding markets such as Spokane and Boise as well as non-traditional venues like ski resorts and casinos which provide both indoor and outdoor options and various capacities. Based on their location within the central core of the population bases of their respective communities, it is appealing to promoters to book these facilities. Market research, including input from concert/entertainment/family shows, suggests relatively limited opportunity to capture this demand segment outside of the annual North Idaho State Fair. Any opportunities will likely require an upgrade of facilities; a targeted marketing plan; a focused effort on developing relationships with concert and family show promoters; and securing partnerships/sponsorships.

Sporting Events

The Fairgrounds currently hosts various sporting events throughout the year including running events such as color runs and cross-country competitions; motorsports such as ArenaCross and ATV classes; gymnastics; baseball and basketball practices; and yoga classes. Various local, state, and regional sports organizations were contacted to gain insights regarding the Fairgrounds' marketability for their events. Based on input from these user groups and industry contacts, there is a strong sensitivity to cost factors including rental rates and ancillary costs and consistent scheduling. Further, there are several facilities in the area that can host these events, many of which were designed to specifically accommodate this activity. Based on input from user groups, most activity related to sports would be local based. User groups mentioned that a theater with seating, sound system, lighting, changing rooms, and ancillary spaces such as ticketing areas would be a nice addition to the facility landscape, however, these groups are highly price sensitive. Based on potential user input, sports may be a segment that could provide programming opportunities but may not provide significant rental income.

Equine/Livestock/Agriculture

Various equestrian/livestock/agriculture organizations were contacted to gain insight into their experiences at the Fairgrounds and whether there is opportunity to expand and/or create new events at the Fairgrounds. While the existing Fairgrounds has the ability to host event activity related to equine/livestock/agriculture, there are improvements that can be made to improve the experience for current user groups and also potentially attract new events. Users expressed concerns with consistent electrical connections as well as Wi-Fi connectivity, speaker systems, restrooms and the number of RV spaces with electrical hookups. Further, user groups expressed that the footing in the practice arena and the stalls are in poor condition. Several groups commented that the event staff at the Fairgrounds is very strong and that their events are somewhat self-sufficient with little on-site support needed to assist them.

Rodeo/Bull Riding

In discussions with the Professional Rodeo Cowboys Association (PRCA), there are a few existing rodeos in the Eastern Washington and Idaho region. Kennewick is the largest and only tour rodeo in the region. While there is a PRCA rodeo in Spokane, it is a smaller event and not aggressively promoted. PRCA representatives expressed that the population growth in the market combined with the popularity of PRCA rodeos on television and via livestream suggests there may be renewed interest in a larger Northern Idaho event. Representatives indicated that smaller towns outside of Boise and Treasure Valley have grown their smaller rodeos to reach top 50 events in the U.S. rodeo circuit with examples being Gooding and Filer rodeos. Both Nampa and Caldwell's rodeos have grown into top 25 rodeos. There is opportunity to grow the rodeo business in the Coeur d'Alene market, if desired, and the PRCA is supportive of this potential growth opportunity.

Exhibit/Expo/Meeting Events

The Fairgrounds annually hosts exhibit/expo events and meetings. Several existing users have hosted their events at the Fairgrounds for many years. Discussions with existing users indicate that the Fairgrounds meets their needs but that the buildings and grounds need improvements to address basic issues. Several user groups mentioned leaking roofs, inconsistent electrical, Wi-Fi and ventilation services, and poor access from the parking lots into the buildings. Another common theme was the need for improvements related to scheduling and contracting.

User groups cited the location of the Fairgrounds and the event day support staff as positives. Several groups stated that a larger, indoor facility would complement the current buildings and provide more opportunity for their events to grow. Additionally, users commented that a new facility with higher end finishes could attract additional meetings/events. One user group indicated that they host monthly executive board meetings and there are limited options in the Coeur d'Alene market to host these events. A high-finish meeting room/function hall would also allow events to provide a pre- or post-event reception as well as accommodate weddings, family reunions, and other mid-sized meeting/function needs.

Common Themes Among Event Producers

The following summarizes consistent themes expressed by event producers interviewed as part of the market assessment.

- Event staff are exceptional to work with
- Existing facilities, including restrooms, are old and dated
- Existing buildings are small, and layout is not functional
- Roof leaks and inconsistent heating and ventilation throughout the buildings
- Poor access for those with disabilities
- Electrical upgrades are needed
- Parking needs to be paved due to significant mud issues during many months of the year because of weather conditions
- Access from parking lots to buildings needs to be accommodated with paths/walkways
- Stalls are underutilized due to size and overall poor condition
- Wi-Fi needs to be updated to provide consistent coverage
- Date procurement and contracting can be a difficult process
- There is a need for a large, modern facility for consumer shows and expos that can complement and/or connect the other existing facilities
- There is a need for a multi-purpose function room with high quality finishes capable of hosting weddings, meetings, etc.
- There is a need for more RV spaces with electrical hookups

7. MARKET ASSESSMENT



MARKET ASSESSMENT

Based on the research conducted for this study, this section provides key findings that serve as one of several factors that will be used by the project team to develop and prioritize programmatic recommendations that seek to enhance the Fair as well as year-round event activity. The following summarizes relative strengths and opportunities as well as challenges and threats associated with the Fairgrounds' market environment and current physical program.

Strengths & Opportunities

- Historical and projected population growth in the County
- Highway accessibility and proximity to highly populated areas such as Spokane
- Annual growth in attendance at the Fair
- Fairgrounds is a unique asset in the community given the amount and type of space offered including outdoor green space
- Fairgrounds accommodates multiple non-Fair uses on a year-round basis
- Fairgrounds has generated an operating profit in recent years
- Climate during summer months
- Ability to leverage the Fairgrounds' campus-like setting and increase marketability by improving event spaces
- Opportunity to enhance the Fair which generates the highest attendance and revenue
- Opportunity to retain and expand existing year-round business as well as attract new events
- Opportunity to enhance the overall functionality of the Fairgrounds

Challenges & Threats

- Site is generally landlocked and may not be able to accommodate future Fair growth
- Site acreage has decreased over the years due to portions being dedicated to other, non-Fairgrounds related functions, which may continue in the future
- Existing facilities and infrastructure are dated
- The layout of the Fairgrounds is not considered to be efficient in terms of functionality
- Lack of paved areas can create difficulty accessing buildings, particularly during and after adverse weather conditions such as snow, rain, etc.
- Parking is limited during certain times of the year
- The grandstand features a relatively limited seating capacity which limits attendance and revenues at certain Fair entertainment
- Existing Fairgrounds features limited indoor event space, horse stalls and RV spaces
- Silverwood Theme Park offers year-round attractions that compete with the Fair
- Multiple large fairs in the State and region
- Supply of competitive facilities for non-Fair event activity in the area, especially in Spokane
- Potential price sensitivity of the market
- Climate is unfavorable in winter months which limits certain outdoor, non-Fair activity
- Lack of a formal booking policy
- Potential changes in general macro-economic conditions
- Unknown long-term impact of COVID-19

Based on the analysis of market attributes, historical operations of the Fairgrounds, programming at peer facilities, input from existing and potential user groups and our industry experience, the following prioritizes event programming opportunities by relative market demand and includes both expanded and new market segments.

Market Segment	Market Demand Potential	Rationale
Fair	High	<ul style="list-style-type: none"> • Historical significance to the County and State • Most significant existing demand generator and revenue producer • Increasing attendance in recent years • Important to enhance for long-term sustainability • Potential to increase revenue streams with better vendor space, a more functional layout, an improved overall enhanced guest experience, etc. • Physical improvements for the Fair will also positively impact marketability for non-Fair activities.
Community/Social	High	<ul style="list-style-type: none"> • Existing base of business • Growing local population base • Consistent with Board's mission to serve the educational and entertainment needs of the community • Ability to accommodate larger events that cannot currently be accommodated in the local market • Diversity of programming opportunities (e.g. parties, markets, banquets, fundraisers, weddings, etc.)
Expos/Exhibit/Meeting Events	Moderate	<ul style="list-style-type: none"> • Existing base of business • Potential to increase events, attendance and revenue • Potential to attract larger events • Diversity of programming opportunities (e.g. tradeshow, consumer shows, meetings, car shows, boat shows, RV shows, etc.) • Event producer input • Competition from area facilities
Horse Shows/Rodeo	Moderate	<ul style="list-style-type: none"> • Existing base of business • Event producer input • Potential to increase number and scope of events • Opportunity for incremental revenue • Competition from area facilities
Livestock/Small Animal/Agricultural	Moderate	<ul style="list-style-type: none"> • Existing 4-H activity • Diversity of programming opportunities (e.g. competitions, sales, educational meetings/seminars, etc.) • Strong agriculture industry in the State • Limited revenue generating opportunity
Entertainment/Sports/Family Shows	Low	<ul style="list-style-type: none"> • Supply of competitive facilities in the area • Event producer input

Recommended Physical Improvements

Based on the market research conducted as part of this analysis, the following outlines preliminary recommended physical improvements that would better position the Fairgrounds for the future.

- Enhance existing facilities that are in poor condition (see K/O Fairground Planners report under separate cover)
- Improve the overall functionality of the Fairgrounds including circulation and wayfinding
- Develop a new Event Center with a minimum of 6,000 seats
 - Column-free, concrete floor with the ability to bring in dirt
 - Should be multi-purpose and divisible
 - Retractable or bleacher seating
 - Other supporting amenities such as meeting rooms, storage, kitchen, restrooms, pre-function space, etc.
- Increase the number of stalls
 - Stalls should be at least 12' x 12' and have easy access to related assets including the Event Center and the outdoor arenas
- Add RV spaces near the new horse stalls as well as at the existing RV Park

The following outlines an alternative option to developing the Event Center described above:

- Increase Grandstand seating at the outdoor arena to a minimum of 6,000
- Develop column-free exhibit space of 25,000 SF
 - Could include new construction or expansion of an existing facility
 - Should be climate-controlled and divisible
- Add storage space

8. FINANCIAL ANALYSIS



FINANCIAL ANALYSIS

As it relates to financial performance, it is important to understand that many similar fairgrounds realize an annual operating loss and receive government subsidies to help offset operating deficits and support the mission, operating objectives and programming opportunities. Many similar fairgrounds are primarily focused on serving community needs, generating economic benefits and operating in a fiscally responsible manner.

Based on the market analysis, the assessment of existing facilities and Master Plan concept prepared by K/O Fairground Planners, and the phasing strategy outlined in the Master Plan, Crossroads Consulting assisted in developing a hypothetical, order-of-magnitude analysis that compares the estimated incremental new operating revenues and operating expenses before depreciation and debt service by phase for the proposed Master Plan to a baseline year. It should be noted that the market analysis conducted for the Master Plan was completed in late 2021. The financial analysis was conducted after the preferred Master Plan concept was identified and agreed upon by the Client. At that time, facility management provided more recent financial data (CY 2023) which reflected post-pandemic operations. Further, this financial information reflected a 10-day fair, which was implemented in 2021 and remained each of the following years. As such, CY 2023 was used as the baseline year in this analysis.

The financial estimate and related assumptions are based on information from primary and secondary sources including, but not limited to, a comprehensive review and analysis of historical Fairgrounds' operations, general market attributes, input from existing and potential users, and stakeholders as well as data on competitive and/or comparable fairgrounds. This analysis is also based on certain hypothetical assumptions pertaining to operations of the Fairgrounds and other related financial assumptions agreed to by facility management. The accompanying analysis was prepared for internal use by NISF for its planning efforts related to future operations of the Fairgrounds and should not be used or relied upon for any other purpose, including financing of the project.

Further, the primary purpose of this analysis is to provide an order-of-magnitude estimate of financial operations associated with the Master Plan; it is not intended to represent actual results. As with all estimates of this type, we cannot guarantee the results nor is any warranty intended that they can be achieved. The estimates of operating revenues and operating expenses are based on the anticipated size, quality and efficiency of the proposed new/enhanced facilities. Since these estimates and assumptions are based on circumstances that have not yet occurred, they are subject to variation. Further, there will usually be differences between estimated and actual results because events and circumstances frequently do not occur as expected, and those differences may be material.

Assumptions

The following summarizes the assumptions used in this analysis.

- The recommended improvements outlined in the Master Plan are implemented which will increase marketability, functionality and revenue generating potential.
- The Master Plan is implemented following the recommended phasing strategy.
- The Fairgrounds is aggressively marketed to commercial event activity.
- The Fair will continue to be operated in a first-class manner and run for 10 days annually.
- Management will continue to:
 - Focus on the quality of the Fair.
 - Target year-round events that generate significant revenues and support the mission of the Fairgrounds.
 - Evaluate users based on how they support the mission and goals and identify the appropriate event space for them based on cost and benefits.
 - Maintain established contacts and strong relationships with event promoters/producers.
 - Aggressively and strategically market the Fairgrounds in a cost-effective manner.
 - Offer discounts to events that support the mission.
 - Provide a high level of customer service.
 - Remain focused on the balance of increasing revenue and cost containment while providing high-quality and affordable entertainment.
- Existing event activity that is consistent with management's mission and goals will utilize the Fairgrounds at a level relatively consistent with past years.
- Market conditions remain relatively consistent with those shown in the Market Analysis.
- No major changes occur in the competitive landscape.
- No significant economic fluctuations, acts of nature, or cataclysmic events occur that could adversely impact the Fairgrounds' business.
- Amounts are presented in 2024 dollars and reflect a stabilized year of operations.

These assumptions are preliminary in nature and should continue to be refined as decisions related to the Master Plan recommendations and other operating characteristics continue to evolve.

Impact to Fairgrounds Financial Operations

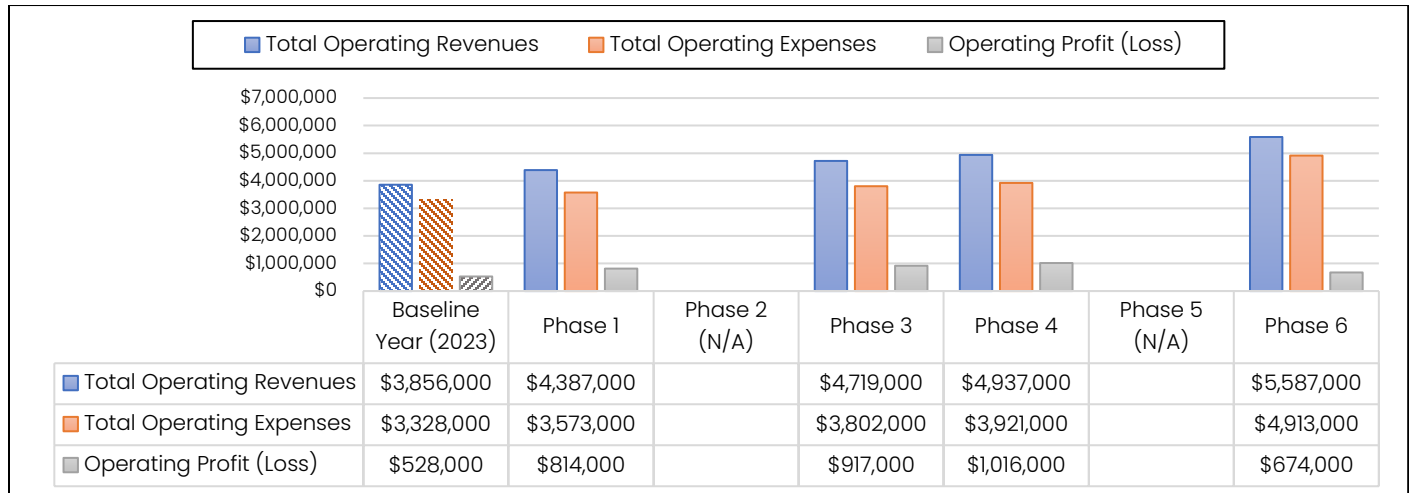
The recommended improvements outlined in the Master Plan are expected to positively impact the Fairgrounds' ability to retain, grow and accommodate existing events including the Fair as well as host incremental new event activity. After additions/enhancements, fairgrounds often experience a "ramp up" period to a stabilized level of activity which occurs for several reasons. For instance, some groups that book their event years in advance may not want to risk that construction is delayed and not completed in time for their event. In addition, some groups may choose to let management "fine tune" its operations before hosting an event at an enhanced or new facility. However, it is important to recognize that overall utilization at any fairgrounds is typically dependent on multiple factors (e.g., market size; accessibility; nearby amenities; size, configuration and quality of the facilities offered;

effectiveness of the management team in booking the facility; date availability; cost, etc.) and is rarely consistent. As such, the financial estimates presented herein represent a stabilized year of operations.

The chart that follows provides an estimate of operating revenues and operating expenses before depreciation and debt service by phase for the proposed Master Plan compared to a baseline year.

The estimated financial operations build upon the previous phase. For example, operating revenues and operating expenses estimated for Phase 6 reflect improvements made in each of the previous phases. Estimated operating revenues and expenses are not shown for phases 2 and 5. Improvements in these phases include addressing deferred maintenance for existing facilities and improvements to general circulation and entry gates. While these improvements are anticipated to enhance the functionality of the Fairgrounds and the attendee experience, they are expected to have a minimal impact on financial operations. The baseline year is shown for comparative purposes.

Impact to Fairgrounds Financial Operations By Phase



Notes: Estimated operating revenues and operating expenses build upon the previous phase.

Estimated operating profit is before debt service and depreciation.

Estimates are not shown for Phases 2 and 5 as the recommended improvements in these phases are not anticipated to have a significant impact on financial performance.

Operating revenues include those related to the Fair such as admissions, concessions, carnival, sponsorships, grandstand seating, parking etc. Operating revenues also include those generated from year-round rentals, concessions, sponsors, and other miscellaneous sources.

Operating expenses include both Fair and non-Fair expenditures such as those related to attractions/entertainment, advertising, maintenance, concessions, salaries/wages, utilities, contracted services, general event expenses, etc. For purposes of this analysis, financial operations for the Fair and year-round operations are shown in aggregate as it is difficult to accurately allocate certain expenses such as salaries/wages, maintenance, and utilities between Fair and non-Fair activities.

Phase 1

Primary projects in Phase 1 include development of a multi-purpose livestock building, administration/extension/4-H offices, a multi-purpose expo building and ticketing entry gates. Operating revenue is estimated to increase by \$531,000 which is primarily driven by increased fair admissions, carnival revenue and concessions from higher attendance, sponsorship revenue, and non-fair event rentals. Operating expenses are estimated to increase by \$245,000 from the baseline which primarily reflects increases in payroll and utilities. Improvements in Phase 1 are estimated to result in an operating profit of approximately \$814,000.

Phase 2

Phase 2 includes renovations to existing vendor buildings and other support facilities and the development of a new maintenance building. These improvements are expected to improve the functionality of the Fairgrounds but not have a direct impact on financial performance.

Phase 3

Projects in this phase include the development of a new multi-purpose livestock building, multi-purpose barns and a livestock and walk-through ticketing gates. Operating revenue is estimated to increase by \$332,000 from Phase 1 which is primarily driven by increased fair admissions, carnival revenue and concessions from higher attendance, sponsorship revenue, and non-fair event rentals. Operating expenses are estimated to increase by \$229,000 from Phase 1 which primarily reflects increases in payroll, event expenses, concessions and utilities. Improvements in Phase 3 are estimated to result in an operating profit of approximately \$917,000.

Phase 4

This phase primarily includes new RV spaces and a new vehicle gate. Operating revenue is estimated to increase by \$218,000 from Phase 3 which reflects an increase in RV rental revenue. Operating expenses are estimated to increase by \$119,000 from Phase 3 which primarily reflects increases in payroll and utilities. Improvements in Phase 4 are estimated to result in an operating profit of approximately \$1.0 million.

Phase 5

This phase includes improvements to gates and circulation. These improvements are expected to enhance the attendee experience and the functionality of the Fairgrounds but not have a direct impact on financial operations.

Phase 6

This phase includes the development of a new indoor arena/multi-purpose building. Operating revenue is estimated to increase by \$650,000 from Phase 4 which reflects increases in revenue derived from admissions, carnival, grandstand seating, sponsors, non-fair event rentals, and concessions. Operating expenses are estimated to increase by \$992,000 from Phase 4 which primarily reflects

increased utilities, payroll, supplies, event expenses, etc. Improvements in Phase 6 are estimated to reduce the operating profit to approximately \$674,000. While buildings of type are generally highly utilized and can attract significant commercial event activity, they are typically expensive to maintain on a year-round basis.

Non-Operating Revenues

Although not quantified in this analysis given the preliminary nature of this project, there are other potential sources facility management could consider to increase revenue generation. These include:

Naming Rights – Through a combination of naming rights, preferential advertising treatment and event sponsorship inducements, one or more private parties may be solicited for up-front or recurring annual commitments. However, as with advertising and sponsorship, the revenue generated from naming rights is generally based on several factors, including but not limited to, the amount and type of event activity, the local corporate base, and management's philosophy on the amount and type of naming rights sold (e.g., selling the entire facility, selling individual buildings, etc.).

Concessionaire Rights – Where a third-party concessionaire provides food/beverage equipment and/or capital in exchange for exclusive rights for a specified term.

Pouring Rights – Where a beverage manufacturer pays the facility for exclusive selling rights for a specified term.

Additional Benefits Associated with the Master Plan

In addition to positively impacting financial operations, the recommendations outlined in the Master Plan will better position management to achieve the goals set for the Fairgrounds. These improvements represent an opportunity to:

- Provide first-class facilities that are affordable and serve the needs of community and visitors
- Preserve and enhance the Fair, which is a significant economic generator for the area
- Retain and grow existing business and host new event activity
- Address deferred maintenance
- Generate incremental new economic benefits to the local economy in terms of spending, jobs, labor income and tax revenues