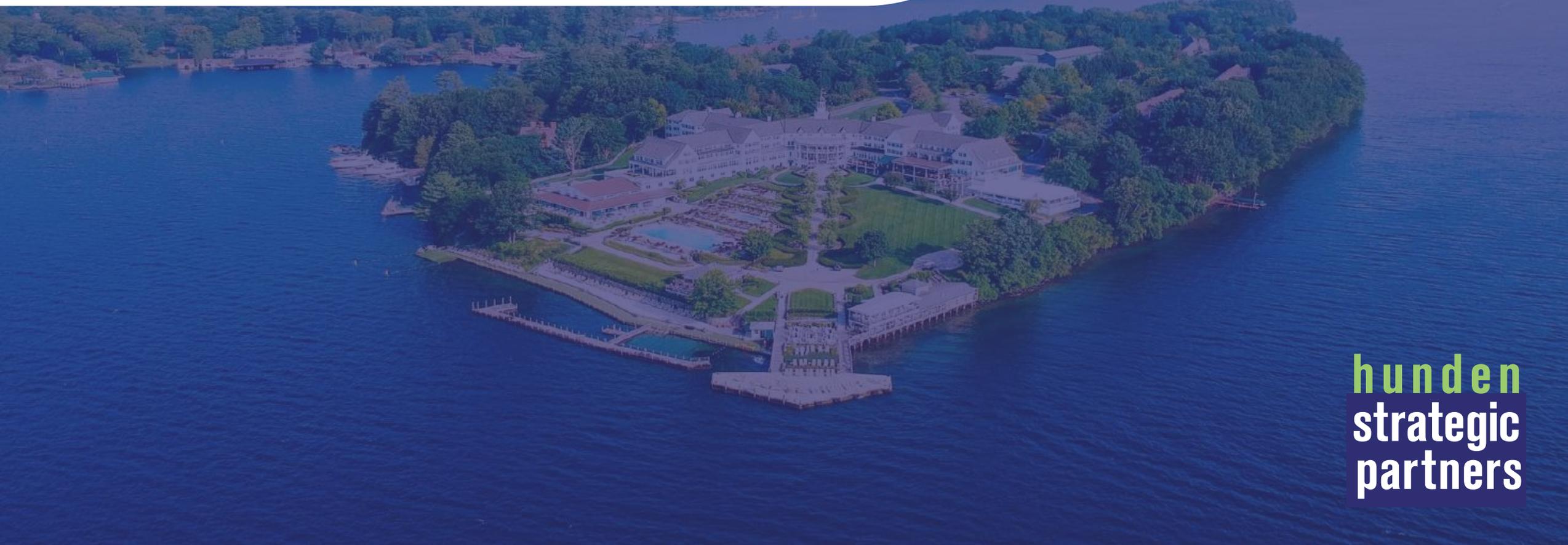


# Warren County, New York Tourism Revitalization & Rejuvenation Services

August 1, 2022



**hunden**  
strategic  
partners

# Agenda

- 01 Introductions
- 02 Roles & Responsibilities
- 03 Methodology
- 04 Experience
- 05 Why Us?
- 06 Q & A





# Introductions

# | Key Personnel



Rob Hunden

CEO & Project Lead  
HSP



Ryan Sheridan

Project Manager  
HSP



David Greusel

Drawings/Budgets  
Convergence Design

# Rob Hunden

## President & CEO

### Public and Private Sector Employment Experience

- Indianapolis Bond Bank/Mayor's Office 1996 - 1998
- Horwath Landauer/Grubb & Ellis 1998 - 2000
- C.H. Johnson Consulting 2000 - 2005
- Hunden Strategic Partners - 2006 - Present

### 25 Years of Industry Experience Nationwide

- 1,000+ Projects and Studies
- Speaker, Teacher and Author
- Move projects from Concept to Reality



# Speaker, Teacher, Author

- Speaker, Teacher and Author
- ALSD Annual Conferences
- IEDC Annual Conferences
- ICMA Annual Conferences
- CSEF Multiple Sessions
- City Nation Place Americas
- Sports ETA Virtual Facilities Summit
- IEDC Leadership Summit
- EEE Conference
- Collaborate & Connect Tourism Regina
- ALSD International
- Professional Developers of Iowa
- Madison Venue Summit
- Urban Land Institute
- Louisville TV & Radio
- ALSD Design & Build Conference
- Race Track Business Conference
- IAVM VenueConnect
- P3 Conference & Expo

## Teaching:

- Adjunct Instructor at Kendall College
- IEDC Ongoing Instructor
- Hotel of Tomorrow Think Tank





# Convergence Design

Convergence Design aims to improve the quality of the built environment through excellent architecture, great design and sound planning.

- **Highly Creative**
- **Specialized Experience**
- **Social Responsibility**
- **Proven track record with HSP**



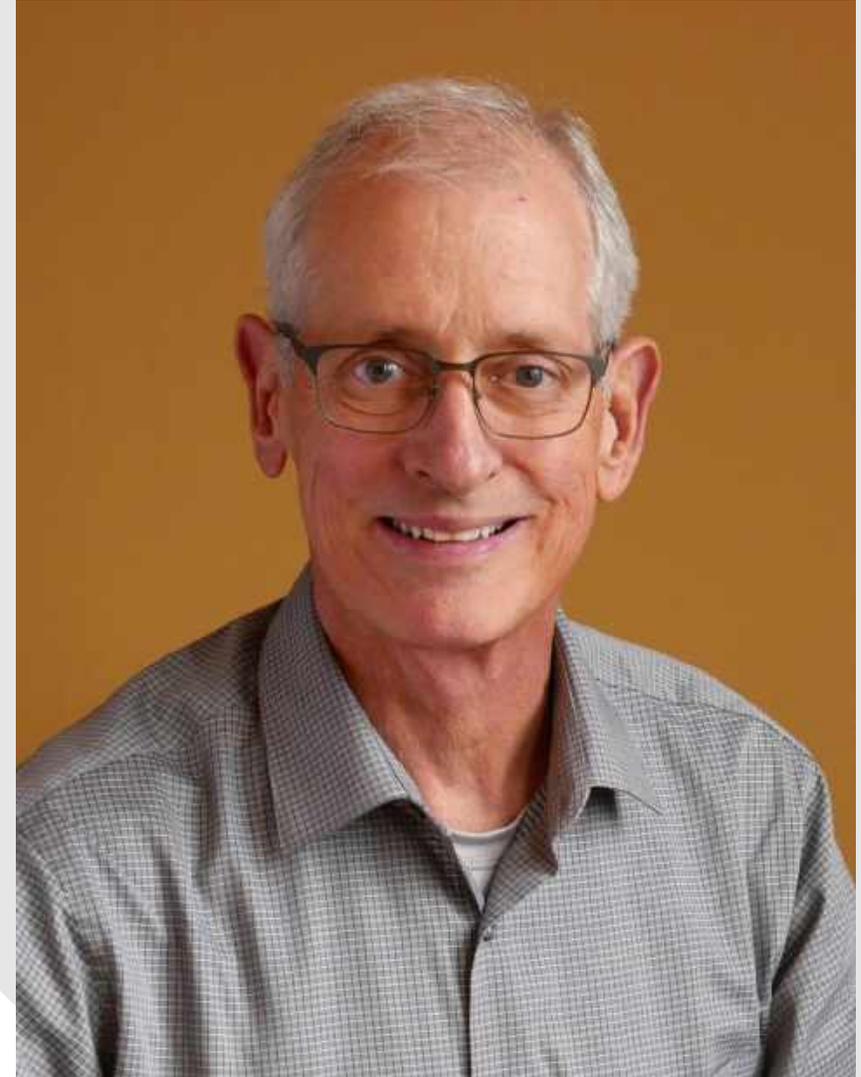
# David Greusel, FAIA, LEED AP Founding Principal

## Design Services for a Variety of Use Types

- Mixed-Use Developments
- Athletic and Recreation Centers
- Stadiums and Arenas
- Civic, Convention and Conference Centers

## 30+ Years of Professional Experience

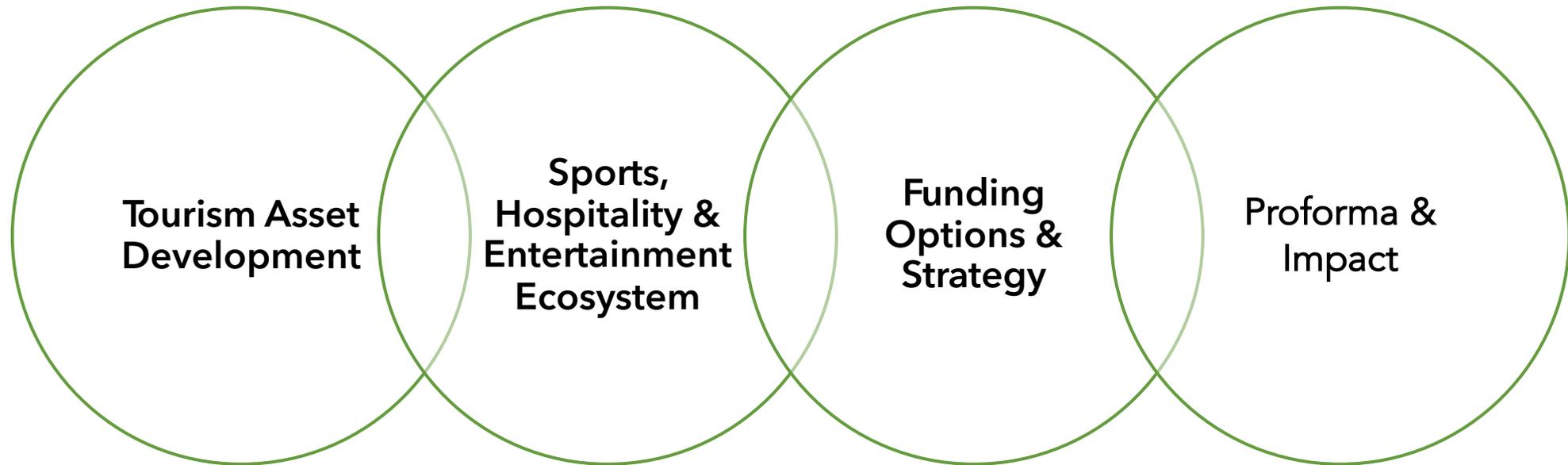
- Architecture and Planning
- Planning, Programming, Design, and Project Management
- Member of College of Fellows of the American Institute of Architects, LEED<sup>®</sup> AP





# Roles & Responsibilities

# | Multi-Disciplinary Team



# Hunden Strategic Partners

- Principal-led by CEO Rob Hunden
- 1,000 projects & studies completed
- Roles & Expertise:
  - Market Demand
  - Financial Feasibility
  - Funding Options & Strategy
  - Economic Impact



# Placemaking & Real Estate Advisory



# 16 Years of Unique Studies & Processes



1000+  
tourism  
destination  
development  
studies



600+  
unique hospitality  
developments



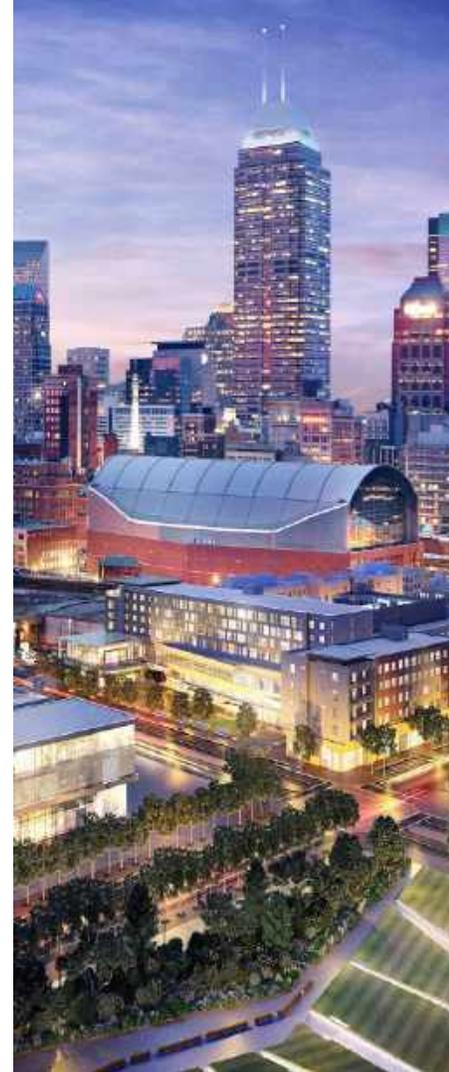
150+  
youth sports,  
stadium & arena  
studies



60+  
studies for events  
and event impact

# Market Intelligence & Strategy for:

- **Tournament Sports Complexes**
- **Entertainment Districts**
- **Conference & Event Centers**
- **Attractions**
- **Multi-Use Arenas & Stadiums**
- **Fairgrounds & Expos**
- **Retail, Restaurant, Residential, Office**





# Methodology



# Goals & Outcomes

# Tourism Revitalization & Rejuvenation

## Outcomes:

- The services being solicited by this RFP are intentionally broad in order to encourage the submission of unique ideas. Interested proposers should submit a scope of the proposed services, the objectives these services are designed to accomplish, metrics by which the accomplishment of those objectives might be measured, the proposer's qualifications and experience providing the proposed services, a proposed time line for service delivery, and a proposed budget. Warren County is open to considering multi-year projects not to exceed a total duration of five (5) years.



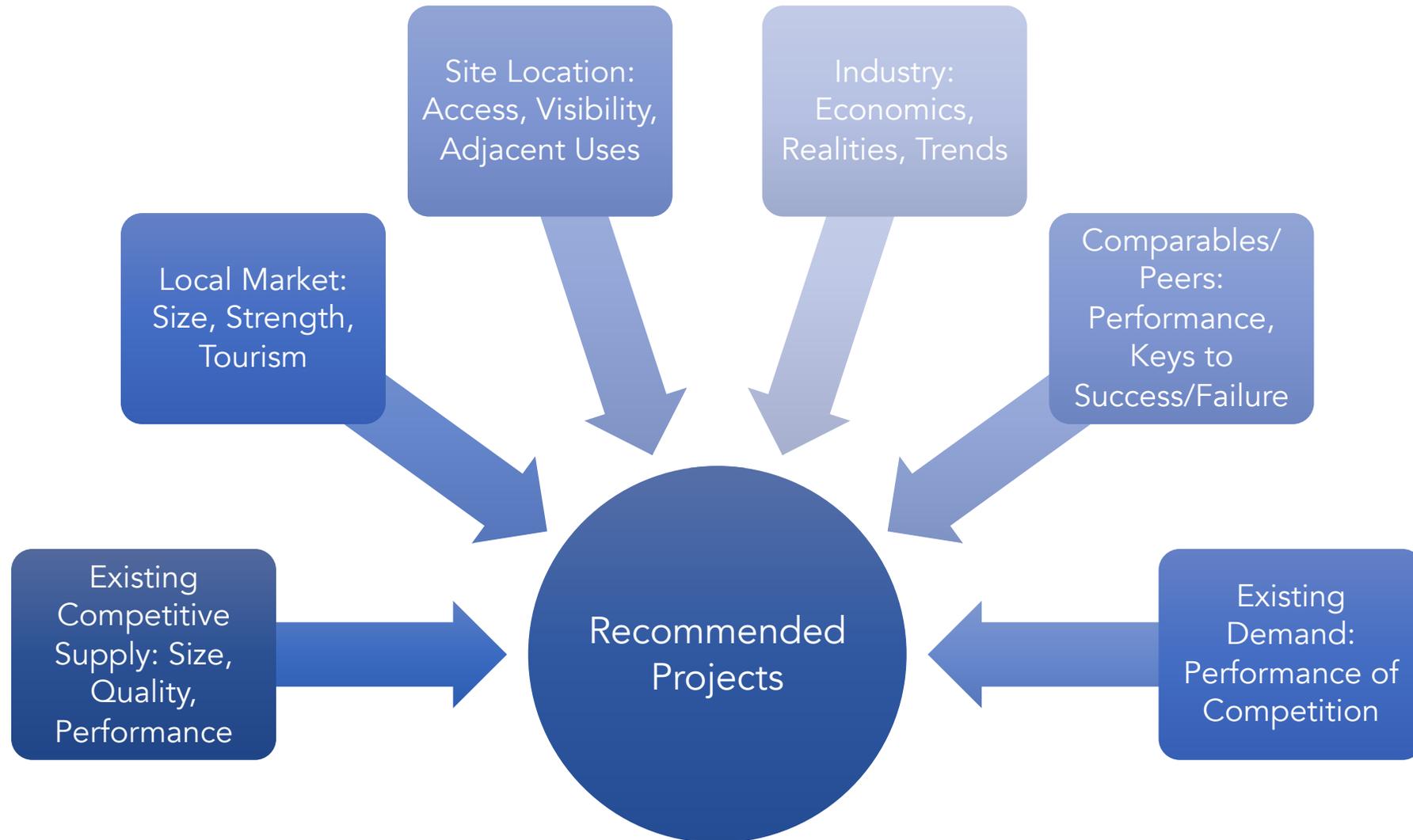


# Approach

# Market & Financial Analysis; Impact

- Task 1 – Kickoff, Project Orientation and Interviews
- Task 2 – Economic, Demographic and Tourism Overview
- Task 3 – Sports Market Analysis
- Task 4 – Ski Hotel Market Analysis
- Task 5 – Special Events Analysis
- Task 6 – Market Findings and Recommendations
- Task 7 – Demand and Financial Projections
- Task 8 – Economic, Fiscal and Employment Impact Analysis

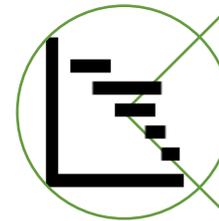
# What Influences Viability & Recommendations?



# Deliverable Milestones & Communication



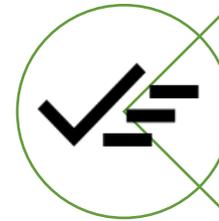
Kickoff Process



Draft Analysis



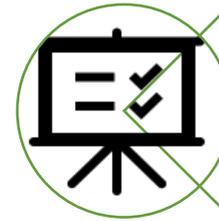
Check - In Calls



Final Analysis



Market Findings



Final Presentation



# Estimated Timeline

## Proposed Timeline & Milestones

	Week #															
	1	2	3	5	6	7	8	9	10	11	12	13	14	15	16	
Task 1 – Kickoff, Project Orientation, Interviews	█								█				█		█	
Task 2 - Economic, Demographic & Tourism Overview from Prior Study	█								█				█		█	
Task 3 – Sports Market Analysis		█	█	█	█	█			█				█		█	
Task 4 – Ski Hotel Market Analysis		█	█	█	█	█	█		█				█		█	
Task 5 – Special Events Analysis			█	█	█	█	█	█	█				█		█	
<b>Task 6 - Market Findings and Recommendations (Presentation)</b>									X							
Task 7 – Demand & Financial Projections										█	█	█	█		█	
Task 8 – Economic, Fiscal, and Employment Impact Analysis										█	█	█	█		█	
<b>Draft Report</b>															X	
Client Edits														█		
<b>Final Report</b>																X



**Tourism Assessment  
vs.  
Market Demand Analysis**

# We Learned:



- **Adirondack Sports Park – Queensbury, NY**

- **Notes:** The Dome is a 108,000-square foot indoor turf field. The facility can host multiple games concurrently, allowing the Dome to host tournaments and leagues. In addition to the indoor facility, there are three baseball fields and a multi-use field on the same property.



- **Cool Insuring Arena – Glens Falls, NY – Capacity 4,806**

- **Notes:** The Cool Insuring Arena is home to the Adirondack Thunder, an ECHL affiliate of the New Jersey Devils. The arena is more than a hockey arena in that it also hosts smaller concerts, the Puppy Bowl (2021 and 2022) and high school basketball sectional tournaments. It can have one court/ice sheet at a time which limits its ability to host multi-team tournaments.



- **Glens Falls Recreation Center – Glens Falls, NY**

- **Notes:** The Glens Falls Rec Center is an ice facility located next door to the Glens Falls YMCA. The facility hosts youth hockey organizations, figure skating events and public skates for the community.

# Additional Warren County Sports Facilities



Crandall Park  
Sports Field



Queensbury  
School District



Jenkinsville Sports  
Park



SUNY Adirondack



East Field

# Sports Facilities

According to the Lake George CVB, approximately 43 percent of Warren County group business over the last 5 years has been driven by sport tourism.

These sports include lacrosse, soccer, basketball, volleyball (indoor and beach), running & cycling events, mountain biking, baseball, softball, hockey, field hockey, disc golf, endurance/long distance swimming, and pickleball.

**Indoor Sports Facilities - Warren County, NY**  
Excluding Public/Private School Facilities

Facility	City	County	Indoor Facilities			
			Multi-Purpose Turf Field	Gymnasium	Ice Sheets	Bowling Lanes
Adirondack Sport Complex - The Dome	Queensbury	Warren	1	-	-	-
Cool Insuring Arena	Glens Falls	Warren	-	-	1	-
Glens Falls Recreation Center (Fire Rd Rink)	Glens Falls	Warren	-	-	1	-
Kingpin Family Fun Center	S. Glens Falls	Saratoga	-	-	-	42
Lanes and Games Bowling Center	Lake George	Warren	-	-	-	24
SUNY Adirondack Community College	Queensbury	Warren	-	1	-	-
<b>Total</b>			<b>1</b>	<b>1</b>	<b>2</b>	<b>66</b>

Source: Hunden Strategic Partners, Warren County Tourism

**Outdoor Sports Facilities - Warren County, NY**  
Excluding Public/Private School Facilities

Facility	City	County	Outdoor Facilities					
			Diamonds	Fields	Basketball	Tennis	Ice Sheets	Trails (Miles)
Adirondack Sport Complex - The Dome	Queensbury	Warren	4	3	-	-	-	-
SUNY Adirondack Community College	Queensbury	Warren	1	1	-	6	-	-
Adirondack MX Facility	Fort Ann	Washington	-	-	-	-	-	3.1
Crandall Park	Glens Falls	Warren	2	3	2	2	-	-
Cole Woods Ski Trails	Glens Falls	Warren	-	-	-	-	-	4.1
East Field Stadium	Glens Falls	Warren	4	4	2	-	-	-
Golden Goal Sport Park	Fort Ann	Washington	-	8	-	-	-	-
Gumey Mountain Bike Park	Queensbury	Warren	-	-	-	-	-	13
Haviland Cove	Glens Falls	Warren	1	-	-	-	-	-
Warrenburg Town Rec Fields	Warrenburg	Warren	2	2	2	2	-	-
Rogers Beach Park	Bolton Landing	Warren	-	-	1	2	-	-
Vet Memorial Park	Bolton Landing	Warren	-	-	1	-	-	-
<b>Total</b>			<b>14</b>	<b>21</b>	<b>8</b>	<b>12</b>	<b>0</b>	<b>20</b>

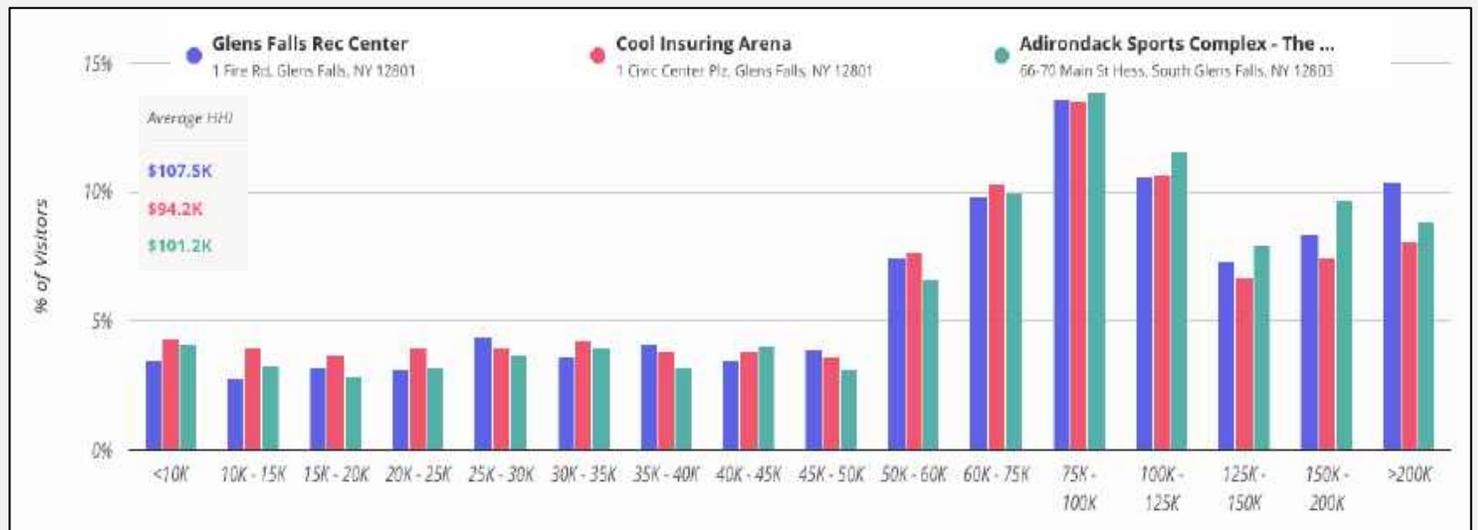
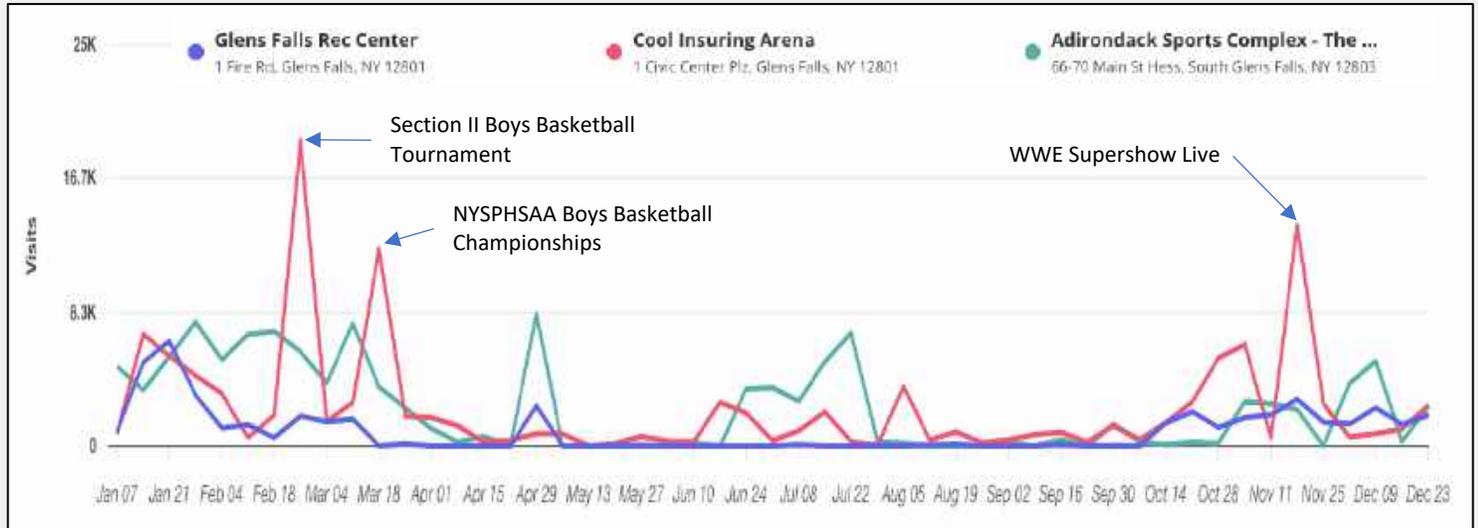
Source: Hunden Strategic Partners, Warren County Tourism

# Warren County Sports Facilities Visitation

2021 Combined Visitation Characteristics beyond 30 miles to Warren County Sports Facilities:

- 300,100 visits
- 134,900 unique visitors

Home Location of Visitors to Warren County Sports Facilities (2019)



## Factors Driving Tournament Demand & Activity

There are several factors that impact a city's ability to capture large tournaments. These factors include the following:

- Number and quality of fields and playing surfaces
- Strong on/off-site amenities and attractions
  - Food & Beverage
  - Retail
  - Hotels
  - Entertainment
- Accessibility, by Air and by Car

Counties, cities and destinations with stronger packages of the above listed items will be more successful in attracting major tournament groups. These major tournament groups garner a nationwide pull for tournaments, which brings in teams from surrounding states and across the country.



## Opportunity in Warren Co.

- There is a gap in indoor facilities for court sports and hockey
- The area has seen success in outdoor tournaments, leading to 43 percent of the area group business, but has room for growth during winter/mud months
- Sectional basketball and minor league hockey already use the Cool Insuring Arena. This facility could be leveraged as a championship sheet/court for basketball and hockey tournaments.

# Interview Adirondack Youth Hockey Assoc.



Royce Lawrence, President of AYHA

Hockey in Warren County:

There are currently 525 children participating in AYHA, with over 100 coaches and hundreds of other family volunteers.

AYHA is one of the five largest youth hockey programs in New York state, and the largest to the east of Rochester.

Hockey families have to travel to Buffalo, Rochester, NY; Marlboro, MA; Philadelphia, PA for tournaments.

The hockey season lasts from October to April. During the spring, these hockey players often shift to lacrosse.

Warren County sees strong competition with Essex County over youth hockey programs.

# | Our Deep-Dive:

- Industry Trends
- Local Sports Facilities
- Regional Sports Facilities
- Comparable Sports Facilities
- Recommendations for New Facilities & Programming
- Pro Forma
- Impact



# Sample Output

# Local Indoor Athletic Supply

Aside from Atwood Stadium and Dort Financial Center, the supply of indoor facilities within 40 miles of Genesee County mainly consist of training facilities, multi-use complexes that are too small for large scale tournaments and outdoor parks.

When tournaments do happen in the area, they are split up amongst multiple different facilities, which limits Genesee’s ability to attract these tournaments.

The following sections include an analysis of the most relevant indoor and outdoor facilities in the local market.

Legend		Local Youth Sports Facility Supply											
Indoor Facility	Outdoor Facility/Park	Indoor/Outdoor	Facility Name	Location	Distance from W Hill Road (Miles)	Basketball	Volleyball	Indoor Turf Field	Outdoor Turf Field	Outdoor Grass Field	Diamonds	Batting Cages	Ice Sheets
			Mundy Sportsplex	Flint, MI	1.6	-	-	2	-	-	-	1	-
			Genesee Fieldhouse	Grand Blanc, MI	3.7	-	-	2	-	-	-	-	-
			Cage Sports	Swartz Creek, MI	6.0	4	-	-	-	-	-	-	-
			Grand Blanc Soccer Zone	Grand Blanc, MI	6.7	-	-	2	-	-	-	-	-
			Bicentennial Park	Grand Blanc, MI	6.7	-	-	-	-	5	10	-	-
			Flint Iceland Arena	Flint, MI	7.8	-	-	2	-	-	-	-	1
			Kettering University Atwood Stadium	Flint, MI	8.7	-	-	-	1	-	-	-	-
			Ascension Genesys Health Club	Grand Blanc, MI	10.0	2	4	-	-	-	-	-	-
			Dort Financial Center	Flint, MI	10.7	4	8	2	-	-	-	-	2
			Berseton Field House	Flint, MI	11.5	1	-	-	-	-	1	-	-
			Deer Run Soccer Complex	Linden, MI	11.7	-	-	-	-	13	-	-	-
			McBrook Sports Complex	Fenton, MI	12.4	3	-	1	-	-	-	4	-
			Crystal Fieldhouse Ice Arena	Burton, MI	13.0	-	-	-	-	-	-	-	2
			Jack N. Abernathy Regional Park	Davison, MI	17.8	-	-	-	-	-	4	-	-
			MAAC Sports & Fitness	Clio, MI	18.9	2	-	-	-	-	-	-	-
			Clio Area Youth Sports Complex	Clio, MI	21.6	-	-	-	-	12	8	-	-
<b>Total/Average</b>					<b>10.6</b>	<b>16</b>	<b>12</b>	<b>11</b>	<b>1</b>	<b>30</b>	<b>13</b>	<b>5</b>	<b>5</b>
Source: Various Sources													

# Regional Indoor Athletic Supply

The regional supply of youth sports facilities, within a five-hour drive time of Genesee County, presents a significant supply of major indoor and outdoor facilities.

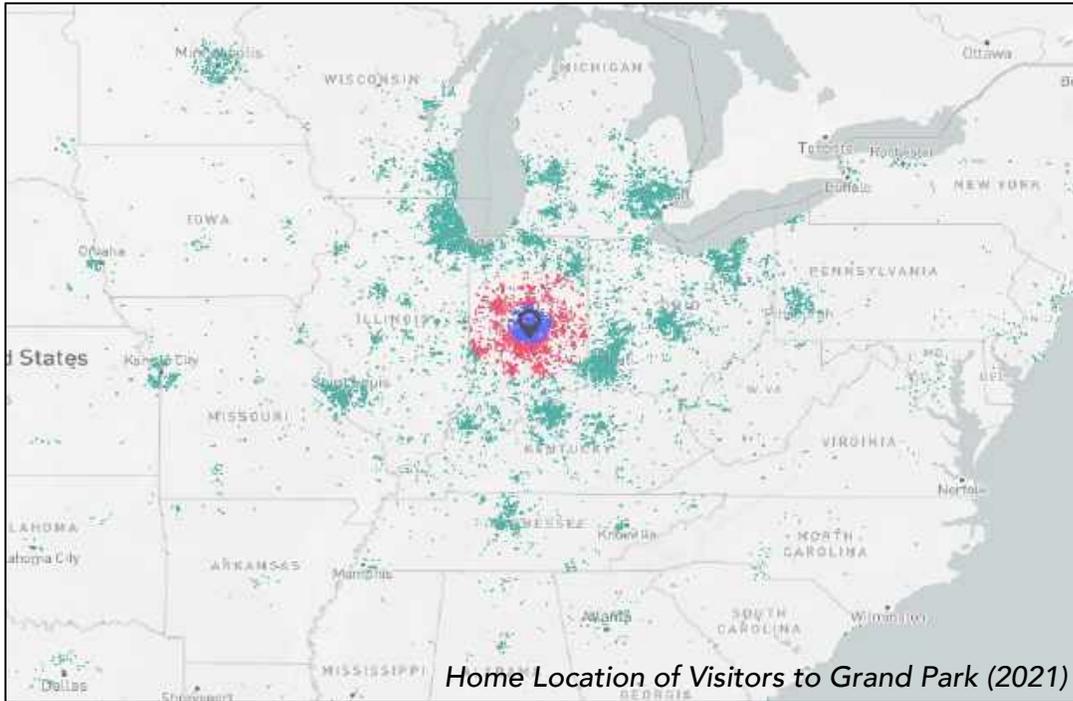
However, within eastern Michigan, where most of the state's population is, there is only one major indoor facility (Brighton) and within the entire state there are no major outdoor complexes. Meijer in Rockford (near Grand Rapids) is the only complex with 8 diamonds and there are no complexes with 8 or more high-quality outdoor fields.

		Regional Youth Sports Facility Supply							
			Basketball	Volleyball	Indoor Turf Field	Outdoor Turf Field	Outdoor Grass Field	Diamonds	Ice Sheets
Facility Name	Location	Distance from Flint, MI (Miles)							
Legacy Center Sports Complex	Brighton, MI	41.3	8	18	2	-	7	6	-
Total Sports Complex (Wixom)	Wixom, MI	49.7	-	-	4	-	-	2	-
Michigan Sports Academies (Woodland)	Grand Rapids, MI	110.0	4	6	2	-	1	-	-
Meijer Sports Complex	Rockford, MI	127.0	-	-	-	-	-	8	-
Cedar Point Sports Campus	Sandusky, OH	170.0	10	18	3	8	-	1	-
Lou Berliner Sports Park	Columbus, OH	240.0	4	8	-	-	-	31	-
Crown Point Sportsplex	Crown Point, IN	273.0	-	-	1	2	-	10	-
Wintrust Sports Park	Bedford Park, IL	300.0	8	16	-	-	-	-	-
Grand Park Sports Campus	Westfield, IN	307.0	8	16	3	7	24	26	-
UW Health Sports Factory	Rockford, IL	366.0	8	16	-	-	-	-	-
<b>Total/Average</b>		<b>198.4</b>	<b>50</b>	<b>98</b>	<b>15</b>	<b>17</b>	<b>32</b>	<b>84</b>	<b>0</b>

Source: Various

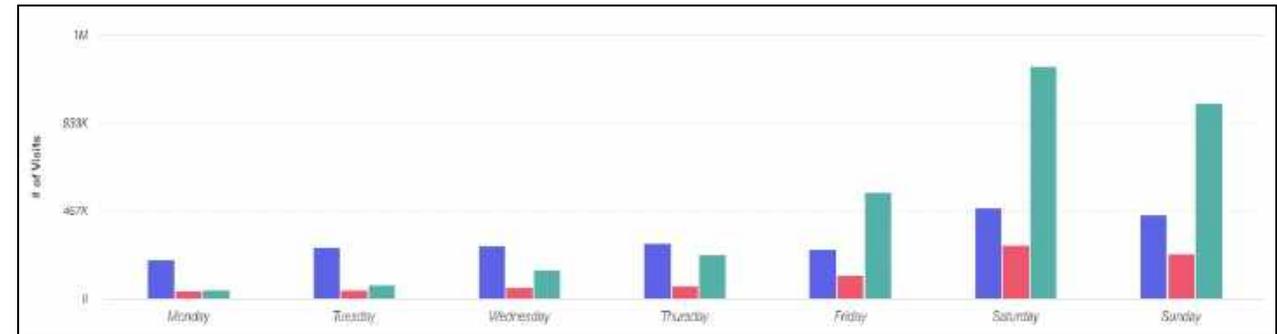
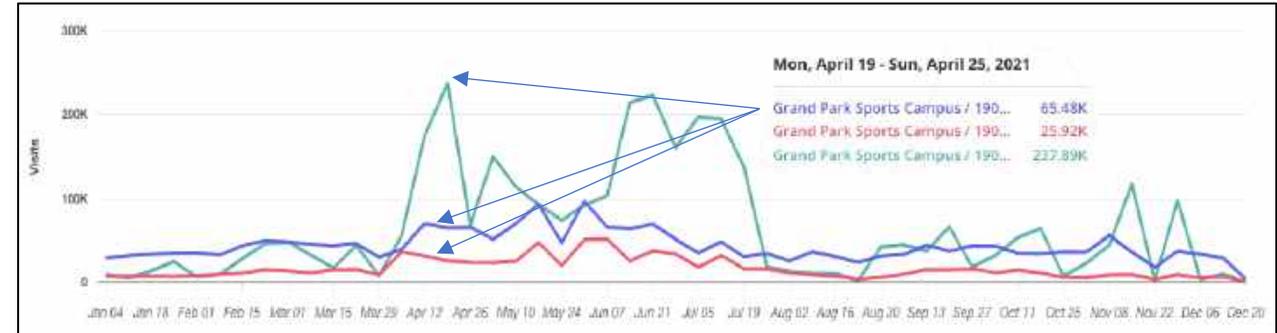
Legend
Indoor Facility
Outdoor Facility/Park
Indoor/Outdoor

# Market Analysis: Visitation



## Visitation Notes:

Grand Park attracts visitors from all of the country, but its largest visitation base is the major cities of the Midwest. Over 50 percent of visitation comes from beyond 75 miles, with the majority of visitation between Friday and Sunday. Weekend visitation displays the impact of tournament activity at Grand Park.



Grand Park - Westfield, IN January 2021 - December 2021					
Visitor Origins by Distance from Site Colors correspond to charts & maps	Total Visits		Total Unique Customers		Avg. Visits per Customer
	Est. Number of Visits	Percent of Total Visits	Est. Number of Customers	Percent of Total Customers	
Locals - Within 25 miles	2,200,000	34.6%	232,200	17.2%	9.47
Regional Distance - Over 25 miles & Less Than 75 miles	861,800	13.5%	157,600	11.7%	5.47
Long Distance only - Over 75+ miles	3,300,000	51.9%	961,800	71.2%	3.43
<b>Total Visits</b>	<b>6,361,800</b>	<b>100.0%</b>	<b>1,351,600</b>	<b>100.0%</b>	<b>4.71</b>

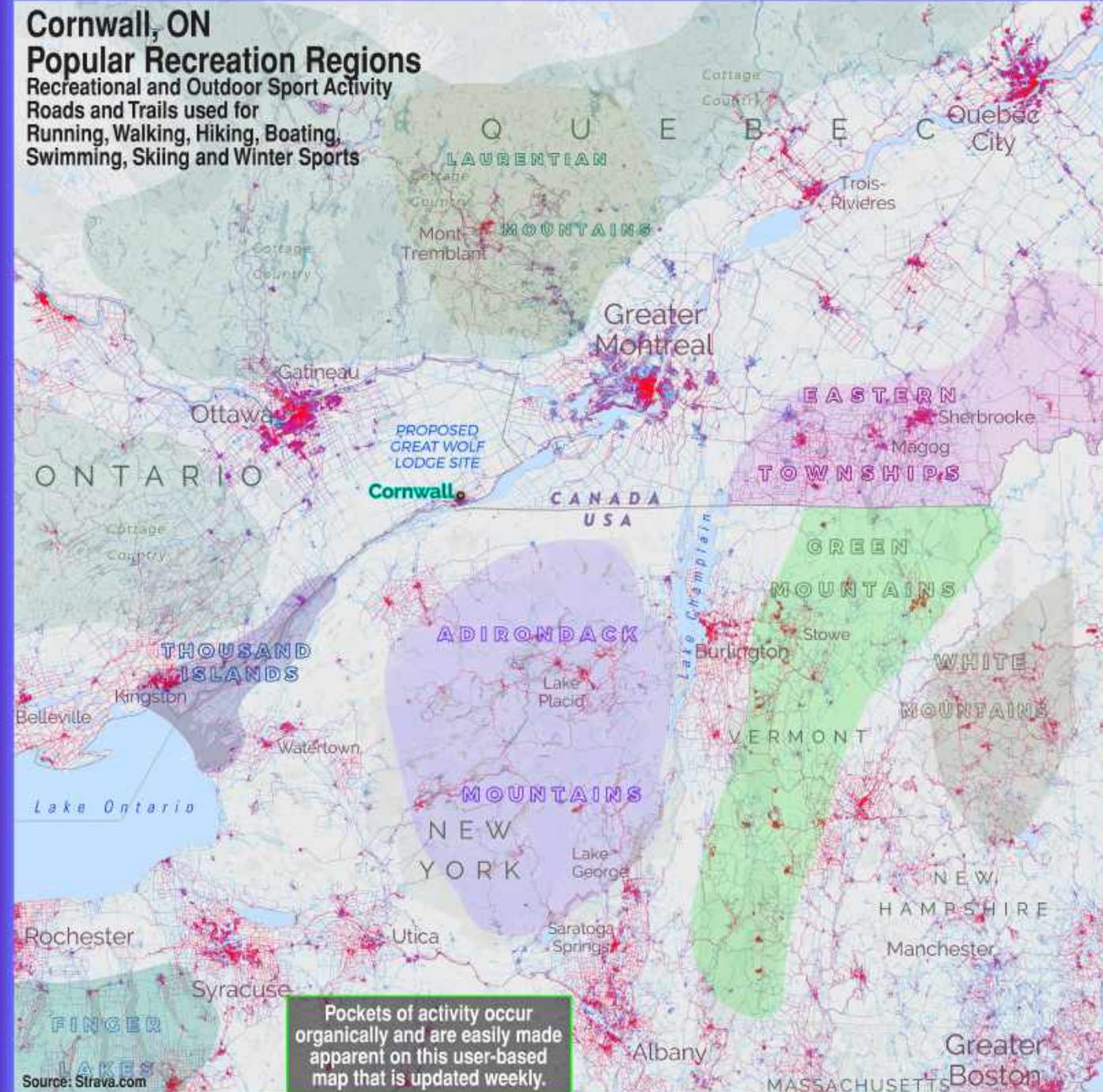
Source: Placer.ai

# Supply Maps



# Recreational Activity

- The map to the right illustrates regional outdoor recreational activity using user-based tracking data from Strava.com. This website's map is kept up to date every week.
- The rural areas that are popular destinations show up as islands of activity across the rural areas, separated by less-traveled rural areas.



# Local, Regional Profiles & Case Studies

## Mundy Sportsplex

**Location:** Flint, MI (Mundy Township)

**Opened:** 2019

**Sports Features:**

- 2 Multi-Sport Turf Fields (Each 32,000 SF)
- Batting Cages

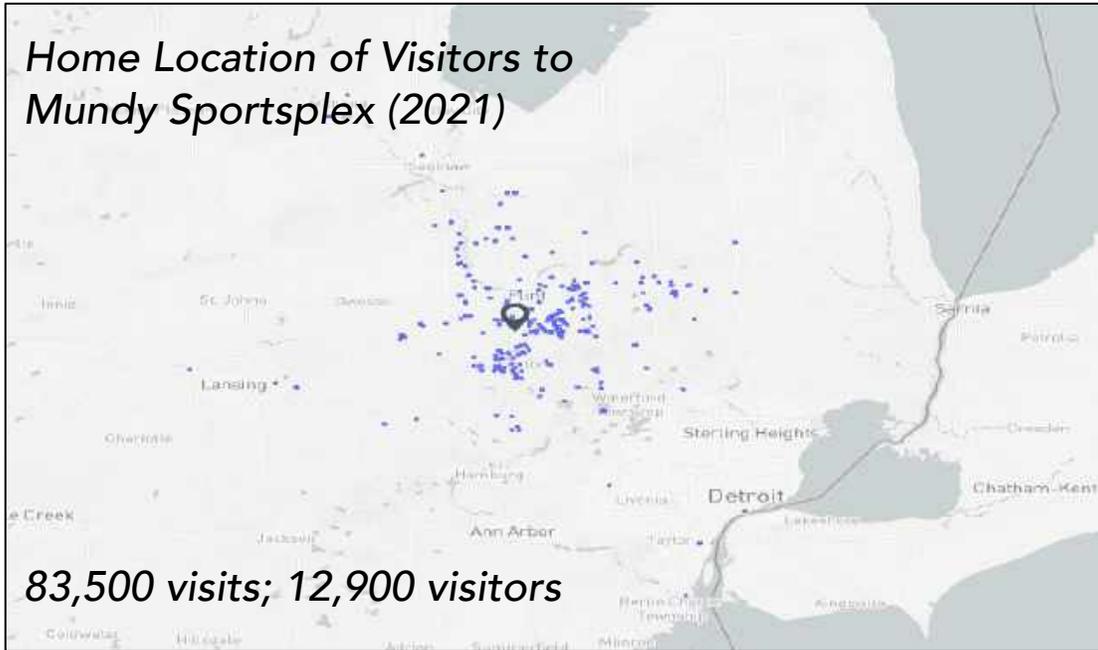
**Notes:** Mundy Sportsplex is a new facility in Genesee County with two large indoor turf fields. The facility hosts soccer leagues and tournaments, baseball, lacrosse and indoor football camps and practices.

The sportsplex is available for rental by teams, corporate events, birthday parties. Additional amenities in the facility include fitness areas and batting cages.



# Local, Regional Profiles & Case Studies

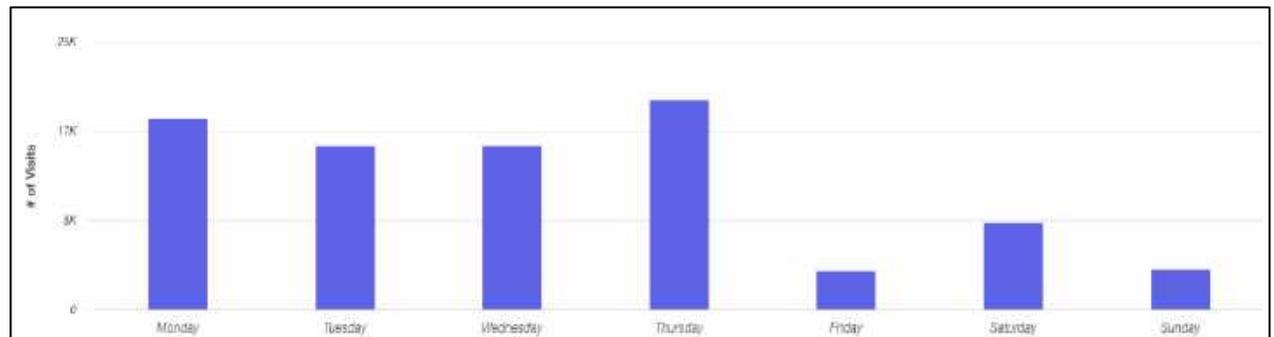
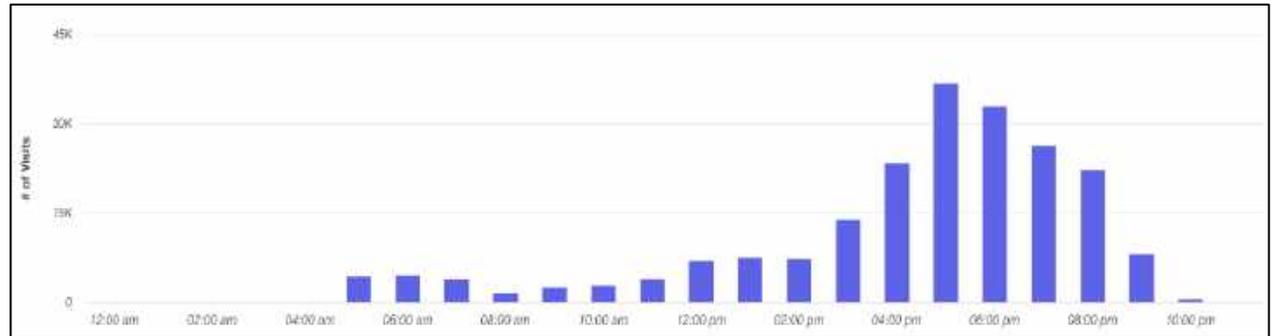
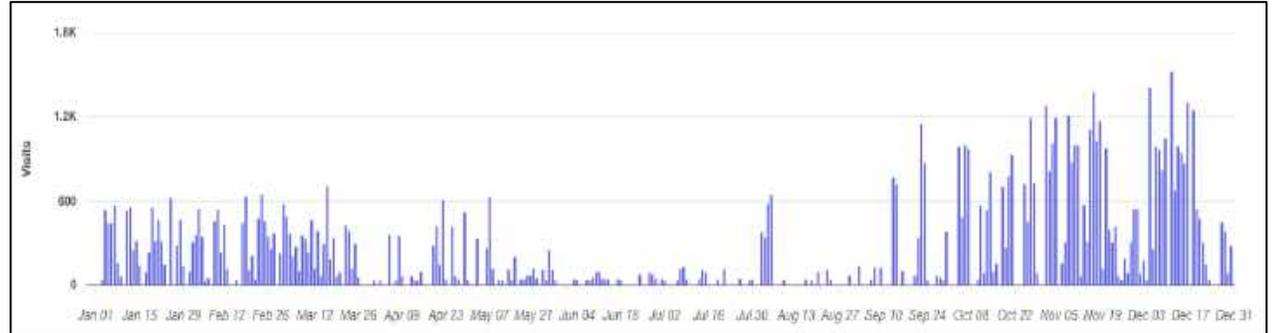
Home Location of Visitors to Mundy Sportsplex (2021)



83,500 visits; 12,900 visitors

## Visitation Notes:

Due to Mundy Sportsplex being a newer smaller facility in the market, over 90 percent of its visitation was accounted for within 25 miles. There were a total of 83,500 estimated visits to the facility, yet only 12,900 unique visitors. On average, each of these visitors went to Mundy Sportsplex roughly 6.5 times throughout the year, indicating a high volume of repeat visitors. The winter months were the busiest periods for the facility, but a sharp decline in activity can be seen on the weekends, indicating that the facility is primarily used for practices during the week for sports that are not in season in the winter such as baseball, softball and soccer.



# Local, Regional Profiles & Case Studies

## Interview – Mundy Sportsplex

HSP interviewed the Mundy Sportsplex staff to gain insight into the operation of the facility. The interview indicated the following:

- Soccer is the most popular sport and Mundy Sportsplex. Their largest tenant is the Nationals Soccer Club with around 450-500 participants, and they primarily use the facility in the winter months for practices.
- In addition to soccer, Mundy Sportsplex hosts softball, baseball, football, lacrosse and wrestling tournaments.
- Weekend visitation was affected by COVID but has been increasing since Fall of 2021. Weekends are used for league play and smaller tournaments that typically occur near Thanksgiving and Christmas.
- Each fieldhouse is separated into a 7v7 sized field and a training space. Tenants can rent out the entire fieldhouse or one of the two spaces at a time. **Rental of the full field is \$600 in the winter months and rental of one of the spaces is \$350.**
- Ownership observed that quality indoor space was lacking within the area and started operations to bring a higher quality to the market. Mundy Sportsplex replaced an old tennis and basketball facility.

# Heat Maps

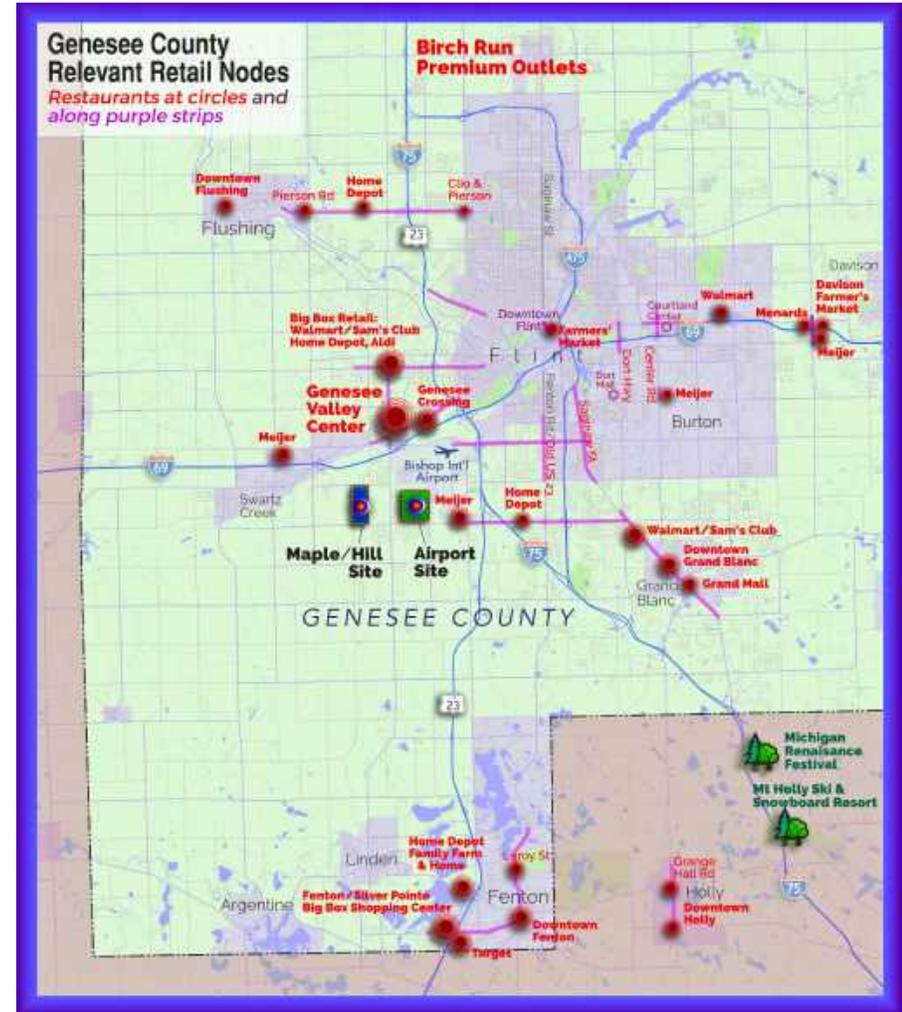
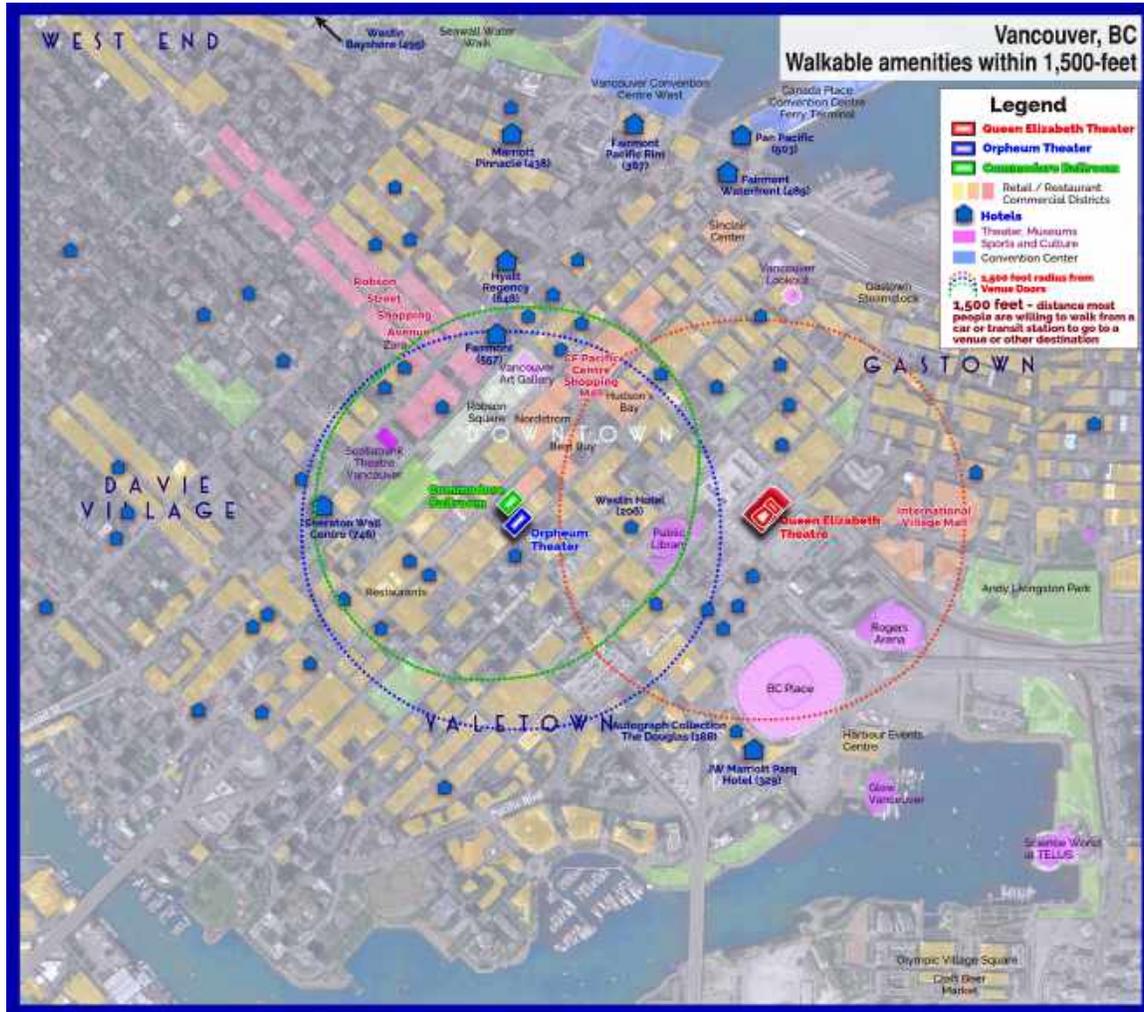
Deer District Foot Traffic  
Entire 15-block area  
April 26 - July 11, 2021



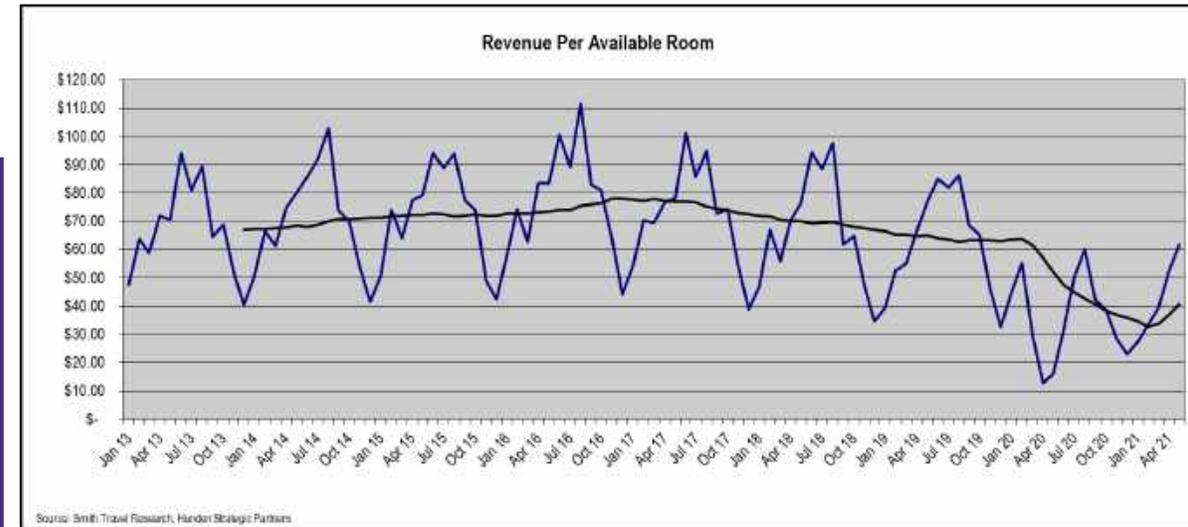
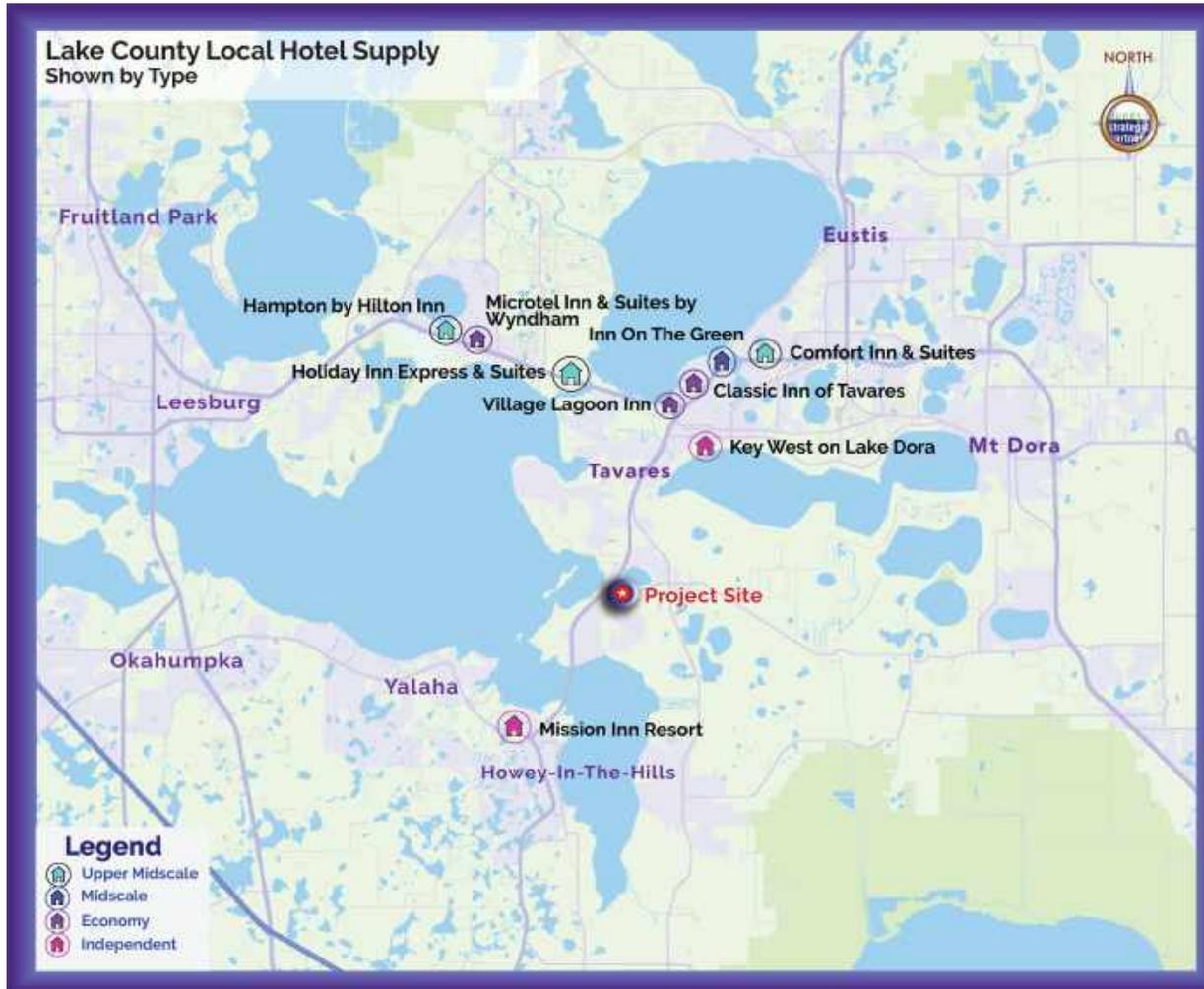
Fiserv Forum Foot Traffic - Close Up  
April 26 - July 11, 2021



# In-House Mapping



# Hotel Market Analysis



**Occupancy Percent by Day of Week by Month - November 2019 - October 2020**

	Sunday	Monday	Tuesday	Wednesday	Thursday	Friday	Saturday	Avg
Nov - 19	58.2%	64.1%	71.7%	76.1%	76.3%	75.0%	76.7%	71.5%
Dec - 19	62.1%	64.4%	69.9%	69.3%	66.6%	70.4%	76.7%	68.2%
Jan - 20	70.7%	74.9%	77.4%	79.0%	85.2%	84.1%	81.7%	79.4%
Feb - 20	83.1%	88.2%	90.9%	88.0%	88.5%	89.4%	87.8%	88.0%
Mar - 20	45.0%	46.0%	44.1%	50.6%	47.7%	45.5%	44.9%	46.1%
Apr - 20	1.5%	n/a	n/a	2.2%	2.2%	1.8%	2.3%	2.0%
May - 20	18.5%	10.3%	10.9%	11.1%	12.5%	20.2%	30.0%	16.8%
Jun - 20	33.4%	24.5%	24.5%	24.2%	29.9%	51.2%	60.2%	34.7%
Jul - 20	37.2%	30.2%	29.6%	31.0%	36.9%	57.2%	65.2%	41.1%
Aug - 20	33.0%	25.8%	27.1%	28.6%	35.3%	63.7%	70.2%	40.8%
Sep - 20	40.0%	19.2%	19.0%	20.9%	27.7%	56.0%	68.1%	34.8%
Oct - 20	33.7%	27.1%	27.0%	29.3%	33.6%	53.1%	61.5%	39.0%
<b>Average</b>	<b>43.4%</b>	<b>40.4%</b>	<b>41.7%</b>	<b>42.6%</b>	<b>45.6%</b>	<b>56.8%</b>	<b>61.9%</b>	

Sources: Smith Travel Research



# Detailed Proformas

Proforma - Hotel (Select Service Branded)												
	Yr 1	Yr 2	Yr 3	Yr 4	Yr 5	Yr 6	Yr 7	Yr 8	Yr 9	Yr 10	Yr 20	Yr 30
Rooms	200	200	200	200	200	200	200	200	200	200	200	200
Occupancy Rate	58%	62%	65%	65%	65%	65%	65%	65%	65%	65%	65%	65%
Average Daily Rate	\$ 119	\$ 123	\$ 126	\$ 130	\$ 134	\$ 138	\$ 142	\$ 147	\$ 151	\$ 155	\$ 209	\$ 281
Occupied Room Nights	42,340	45,260	47,450	47,450	47,450	47,450	47,450	47,450	47,450	47,450	47,450	47,450
Parking (Daily Rate)	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	-	-
Percent Parking	95%	95%	95%	95%	95%	95%	95%	95%	95%	95%	95%	95%
Parking Space Demand	40,223	42,997	45,078	45,078	45,078	45,078	45,078	45,078	45,078	45,078	45,078	45,078
<b>Revenue (000s)</b>												
Rooms	\$ 5,046	\$ 5,555	\$ 5,999	\$ 6,179	\$ 6,364	\$ 6,555	\$ 6,752	\$ 6,954	\$ 7,163	\$ 7,378	\$ 9,915	\$ 13,325
Parking	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -
Other	2.0%	\$ 101	\$ 111	\$ 120	\$ 124	\$ 127	\$ 131	\$ 135	\$ 139	\$ 143	\$ 148	\$ 267
Total	\$ 5,146	\$ 5,666	\$ 6,119	\$ 6,302	\$ 6,491	\$ 6,686	\$ 6,887	\$ 7,093	\$ 7,306	\$ 7,525	\$ 10,113	\$ 13,592
<b>Expenses (000s)</b>												
<i>Departmental Expenses</i>												
Rooms	24%	\$ 1,211	\$ 1,333	\$ 1,440	\$ 1,483	\$ 1,527	\$ 1,573	\$ 1,620	\$ 1,669	\$ 1,719	\$ 1,771	\$ 2,380
Parking	25%	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -
Other	65%	\$ 66	\$ 72	\$ 78	\$ 80	\$ 83	\$ 85	\$ 88	\$ 90	\$ 93	\$ 96	\$ 129
Total		\$ 1,277	\$ 1,405	\$ 1,518	\$ 1,563	\$ 1,610	\$ 1,658	\$ 1,708	\$ 1,759	\$ 1,812	\$ 1,867	\$ 2,509
<b>Gross Operating Income</b>												
		\$ 3,870	\$ 4,261	\$ 4,601	\$ 4,739	\$ 4,881	\$ 5,028	\$ 5,179	\$ 5,334	\$ 5,494	\$ 5,659	\$ 7,605
<i>Undistributed Operating Expenses</i>												
Admin & General	6.2%	\$ 319	\$ 351	\$ 379	\$ 391	\$ 402	\$ 415	\$ 427	\$ 440	\$ 453	\$ 467	\$ 627
Marketing	4.8%	\$ 247	\$ 272	\$ 294	\$ 303	\$ 312	\$ 321	\$ 331	\$ 340	\$ 351	\$ 361	\$ 485
Utilities	3.9%	\$ 201	\$ 221	\$ 239	\$ 246	\$ 253	\$ 261	\$ 269	\$ 277	\$ 285	\$ 293	\$ 394
Operations & Maintenance	4.0%	\$ 206	\$ 227	\$ 245	\$ 252	\$ 260	\$ 267	\$ 275	\$ 284	\$ 292	\$ 301	\$ 405
Total Expenses		\$ 973	\$ 1,071	\$ 1,156	\$ 1,191	\$ 1,227	\$ 1,264	\$ 1,302	\$ 1,341	\$ 1,381	\$ 1,422	\$ 1,911
<b>Gross Operating Profit</b>												
		\$ 2,897	\$ 3,190	\$ 3,445	\$ 3,548	\$ 3,654	\$ 3,764	\$ 3,877	\$ 3,993	\$ 4,113	\$ 4,236	\$ 5,693
Franchise Fees (of Gross Rooms Rev)	9.0%	\$ 454	\$ 500	\$ 540	\$ 556	\$ 573	\$ 590	\$ 608	\$ 626	\$ 645	\$ 664	\$ 892
<i>Fixed Expenses</i>												
Property Taxes (per Key)	\$ 640	\$ 128	\$ 132	\$ 136	\$ 140	\$ 144	\$ 148	\$ 153	\$ 157	\$ 162	\$ 167	\$ 224
Insurance	1.0%	\$ 51	\$ 57	\$ 61	\$ 63	\$ 65	\$ 67	\$ 69	\$ 71	\$ 73	\$ 75	\$ 101
Management Fee	3.5%	\$ 180	\$ 198	\$ 214	\$ 221	\$ 227	\$ 234	\$ 241	\$ 248	\$ 256	\$ 263	\$ 354
Reserves	4.0%	\$ 206	\$ 227	\$ 245	\$ 252	\$ 260	\$ 267	\$ 275	\$ 284	\$ 292	\$ 301	\$ 405
Total		\$ 565	\$ 613	\$ 656	\$ 675	\$ 696	\$ 717	\$ 738	\$ 760	\$ 783	\$ 807	\$ 1,084
<b>Net Operating Income</b>												
		\$ 1,878	\$ 2,077	\$ 2,249	\$ 2,316	\$ 2,386	\$ 2,457	\$ 2,531	\$ 2,607	\$ 2,685	\$ 2,766	\$ 3,717
<i>Operating Margin</i>		36%	37%	37%	37%	37%	37%	37%	37%	37%	37%	37%

Source: Hunden Strategic Partners

# Concept Drawings & Budgets



## Genesee County Youth Sports Detailed Recommendations

Feature	Unit	Unit Size	Max Parking
<b>Phase I (High Priority)</b>			
<i>Sports Spaces</i>			
Basketball/Volleyball (Hardwood)	Courts	8	640
Seating	Seats	250	-
Outdoor Multi-sport Artificial Turf Fields (Lighted)	Fields	4	400
Soccer	Fields	4	-
Softball/Baseball	Diamonds	8	-
Seating		400	-
<b>Phase 2 (Future Priority)</b>			
<i>Sports Spaces</i>			
Outdoor Grass Soccer Fields	Fields	8	800
Seating	Seats	800	-
<b>Total Parking</b>			<b>1,840</b>
<i>Other Key Amenities:</i>		<i>Building Needs:</i>	
Concession/Café/Restaurant/Food Service Area		Team/Changing Rooms	
Play Area/Lounge Space		Offices	
Performance/Physical Therapy Area		Public Restrooms	
Meeting Rooms		Storage	
Lobby Space			

Phase	Item Description	Const. Cost	Soft Costs	Total Project Cost
<b>Phase 1</b>	Multisport artificial turf fields	\$ 8,000,000	\$ 2,000,000	\$ 10,000,000
	Indoor Facility	\$ 29,900,000	\$ 7,500,000	\$ 37,300,000
	Parking	\$ 1,600,000	\$ 400,000	\$ 2,000,000
	<b>Total</b>	<b>\$ 39,500,000</b>	<b>\$ 9,900,000</b>	<b>\$ 49,300,000</b>
<b>Phase 2</b>	Rectangular Fields (grass)	\$ 8,000,000	\$ 2,000,000	\$ 10,000,000
	Softball Fields (grass)	\$ 4,000,000	\$ 1,000,000	\$ 5,000,000
	Parking	\$ 2,400,000	\$ 600,000	\$ 3,000,000
	<b>Total</b>	<b>\$ 14,400,000</b>	<b>\$ 3,600,000</b>	<b>\$ 18,000,000</b>

# Impact

## 30-Yr. Summary of Impacts - Hotel

<b>Net New Spending</b>	<b>(millions)</b>
Direct	\$3,289
Indirect	\$1,233
Induced	\$572
<b>Total</b>	<b>\$5,095</b>
<b>Net New Earnings</b>	<b>(millions)</b>
From Direct	\$1,362
From Indirect	\$684
From Induced	\$336
<b>Total</b>	<b>\$2,382</b>
<b>Net New FTE Jobs</b>	<b>Actual</b>
From Direct	829
From Indirect	313
From Induced	149
<b>Total</b>	<b>1,292</b>
<b>Taxes Collected</b>	<b>(millions)</b>
Collier County Hotel Tax (5.0%)	\$97.8
County Portion of State Sales Tax Collections*	\$1.0
Collier County Sales Tax (1.0%)	\$33.5
Collier County Property Tax	\$48.7
<b>Total</b>	<b>\$181.0</b>

Source: Hunden Strategic Partners

## One-Time Construction Impacts - Hotel

### Development Cost (000s)

Labor (60%)	\$ 140,400
Materials (40%)	\$ 93,600
<b>Total</b>	<b>\$ 234,000</b>

% Labor in State	100%
% Labor in City/County	70%
% Materials in State	100%
% Materials In City/County	70%

### Taxes Generated (000s)

County Portion of State Sales Tax Collections	\$ 468
Collier County Sales Tax (1.0%)	\$ 655

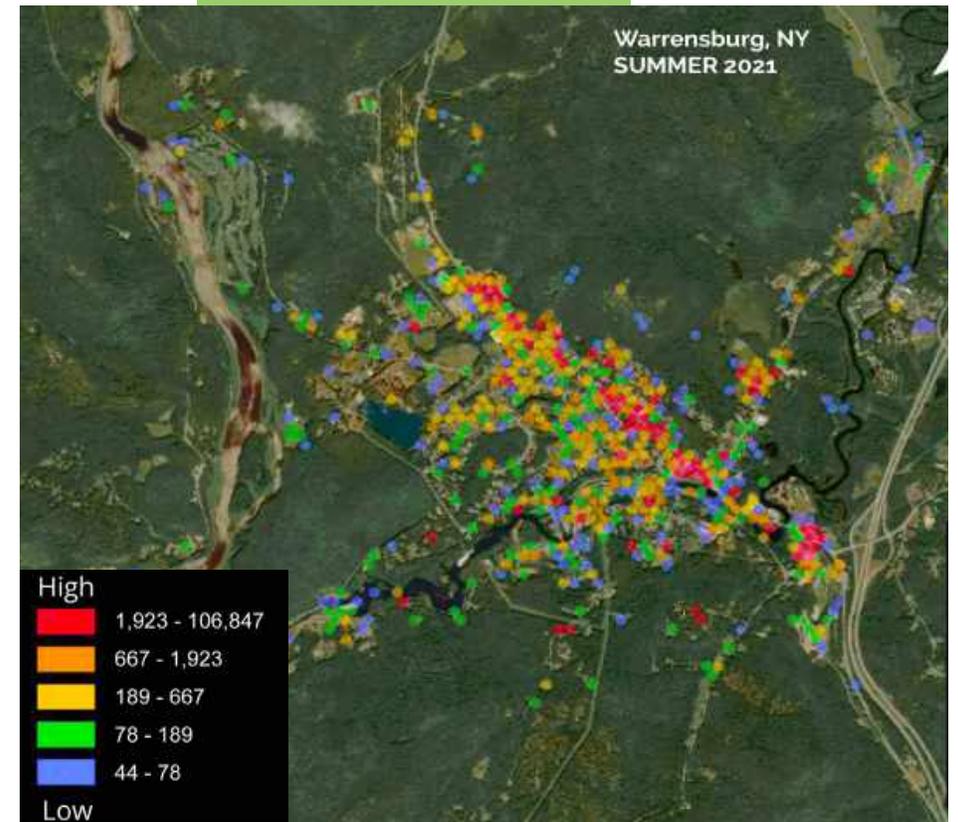
Source: Hunden Strategic Partners



**Experience**

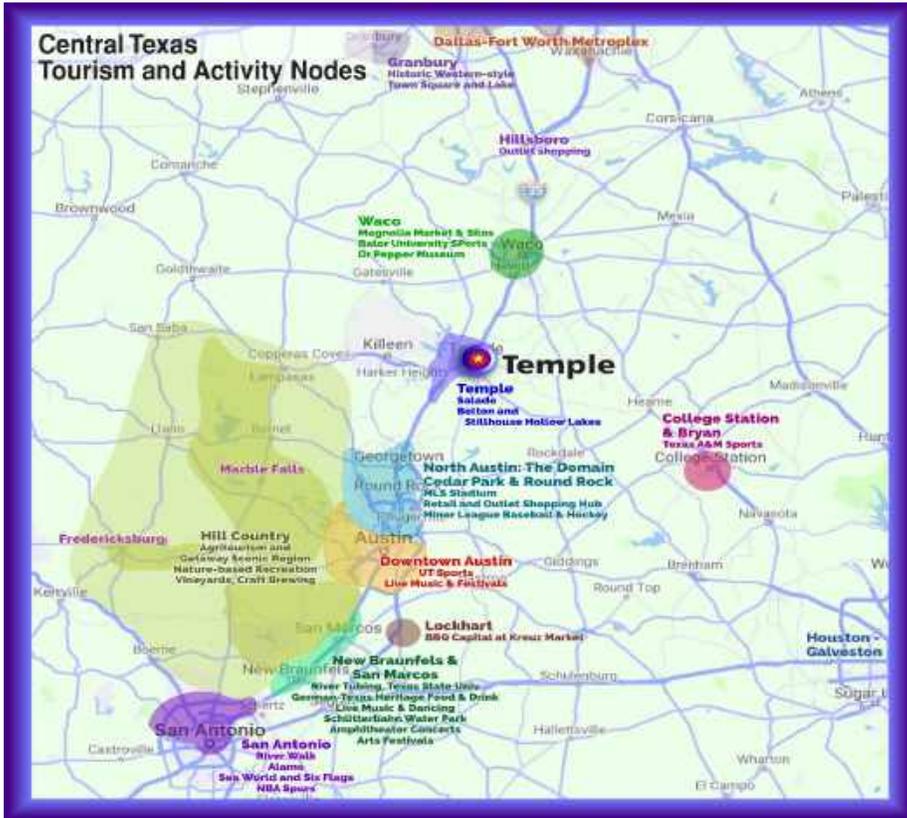


# Tourism Destination



# Warren County, New York

Tourism Study & Competitive Destinations Assessment



# Temple, Texas

Destination Development Master Plan



# Sun Prairie, Wisconsin

Tourism Asset Assessment



COURTESY: MICHIGAN'S GREAT LAKES BOAT REGISTRATION CONVENTION & EXHIBITION



# Great Lakes Bay, Michigan

Tourism Destination Development Plan



# Kansas City, Missouri

Multiple Studies for Sports, Entertainment Developments & Tourism Assets



# Fort Worth, Texas

Multiple Studies for Sports, Entertainment Developments & Tourism Assets



**Sports**



# Bedford Park, Illinois

Wintrust Sports Complex at Bedford Park



# Fishers, Indiana

New Sports Arena Study



# Snohomish, Washington

Sports Facility Market, Financial Feasibility & Impact



# Lacy, Washington

Indoor Sports Complex Feasibility, Impact & Business Plan



# Placer Valley, California

Multi-Use Sports Complex & Event Center



# Windsor, Ontario

Windsor Family Credit Union



# Chicago, Illinois

McFetridge Sports Center



# Irvine, California

Great Park Sports Tournament Complex & Mixed-Use Master Plan



# Overland Park, Kansas

Bluhawk Sports Complex, Arena & Mixed-Use District



# Williamson County, Tennessee

Sports Tournament Complex & Conference Hotel



# Suffolk County, New York

Ronkonkoma Station Sports, Entertainment & Meetings District



**Hospitality**



# St. Charles, Missouri

Suburban Conference Center & Hotel



# Bentonville, Arkansas

Bentonville Motel Feasibility Study



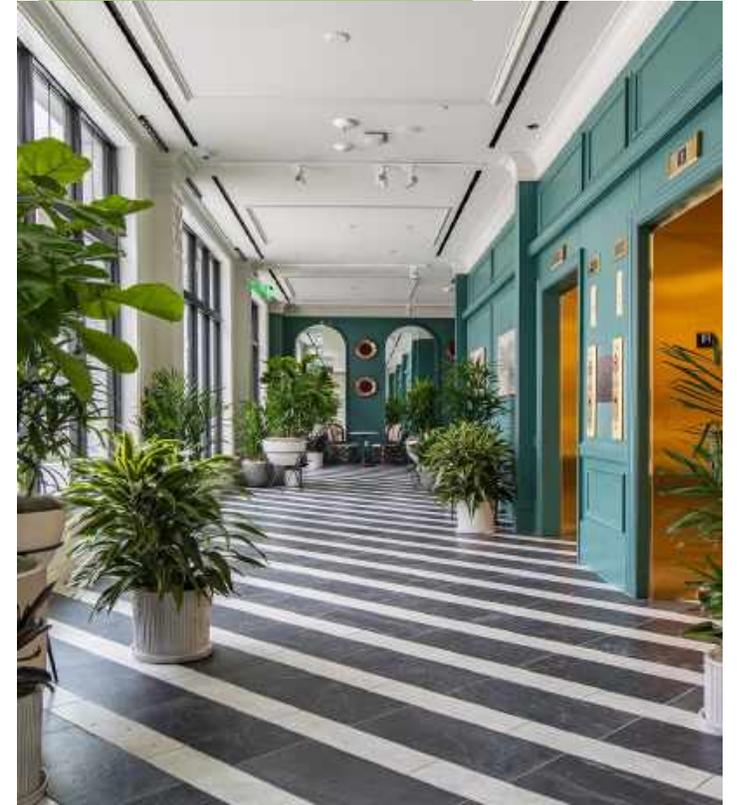
# Bryan-College Station, Texas

Glamping & Urban Hotel Retreat Studies & Advisory



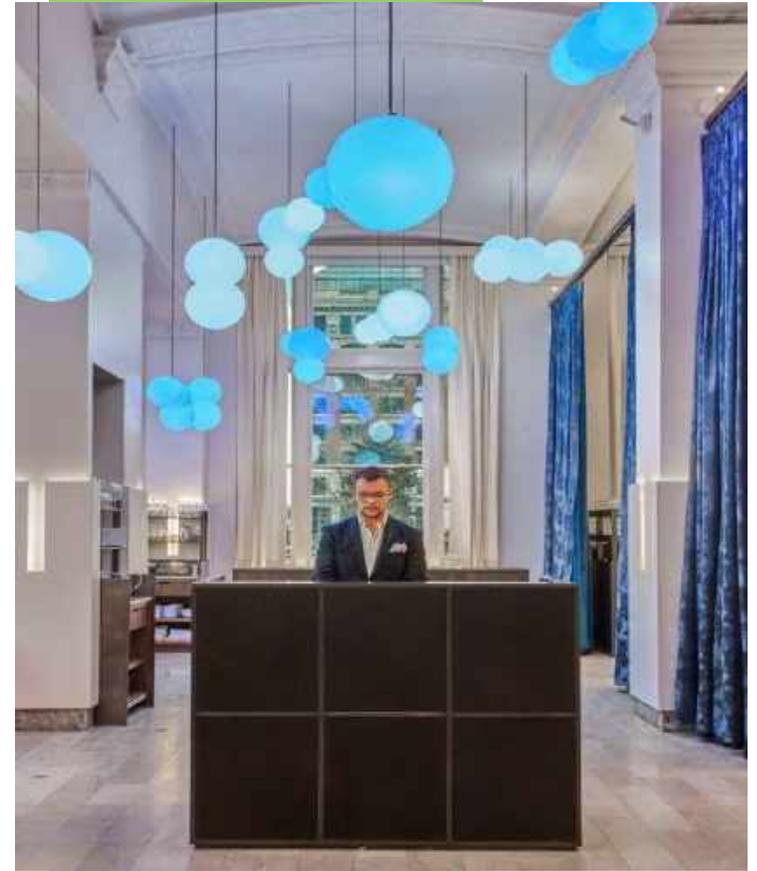
# Collier County, Florida

Great Wolf Lodge



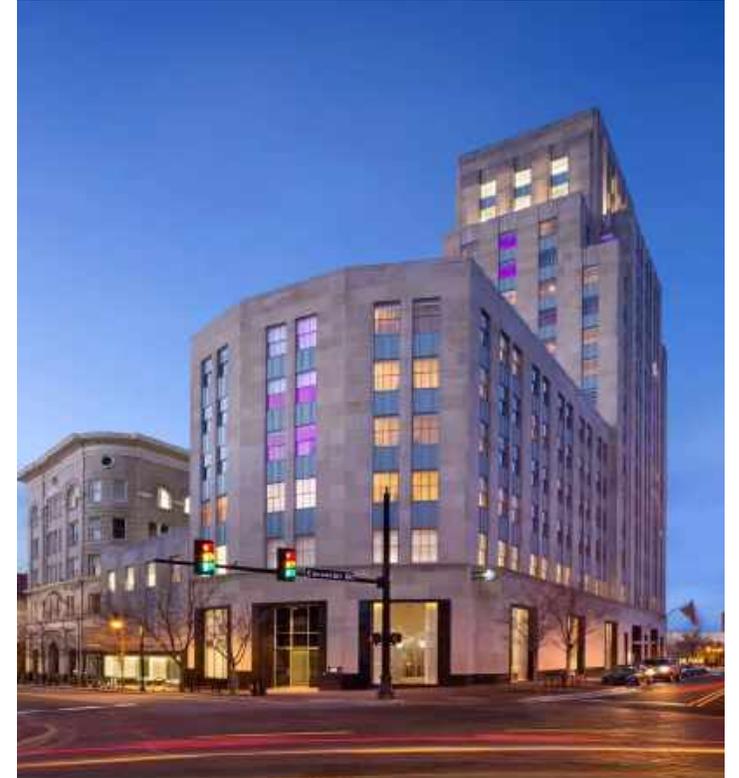
# Omaha, Nebraska

Cottonwood Hotel Boutique Hotel Feasibility & Fiscal Impact Analysis



# Lexington, Kentucky

21c Museum Hotel Market & Economic Impact Study



# Durham, North Carolina

21c Museum Hotel Feasibility & Economic Impact Study



# Louisville, Kentucky

21c Museum Hotel Market & Economic Impact Study



# Chicago, Illinois

Navy Pier Sable Hotel Study



# Loretto, Kentucky

Makers Mark Inn at Star Hill Farm Study



# Stevens Point, Wisconsin

Hotel & Golf Course Destination Feasibility Study



# Newport, Kentucky

Aloft Hotel at Newport on the Levee Study



# Cave City, Kentucky

Mammoth Cave Campground Expansion Impact Analysis



# Collier County, Florida

Great Wolf Lodge

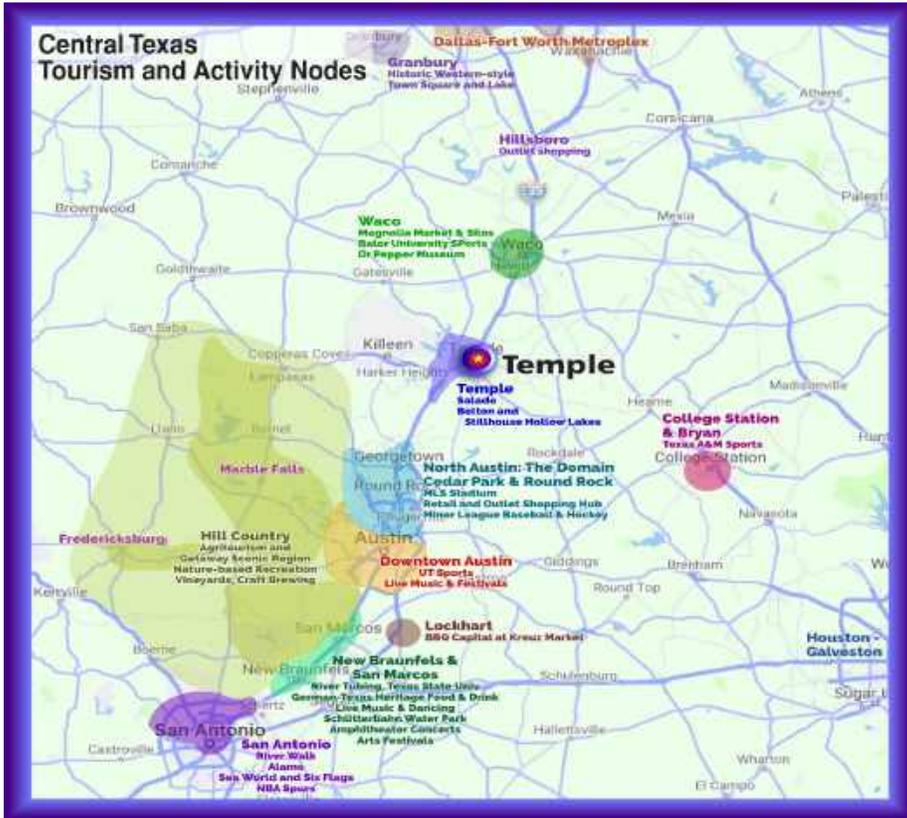


# Events



# Burbank, California

Events Surveys & Impact



# Temple, Texas

Destination Development Master Plan



# Kyle, Texas

Tourism Oriented Development Opportunity



# San Juan, Puerto Rico

T-Mobile Entertainment District



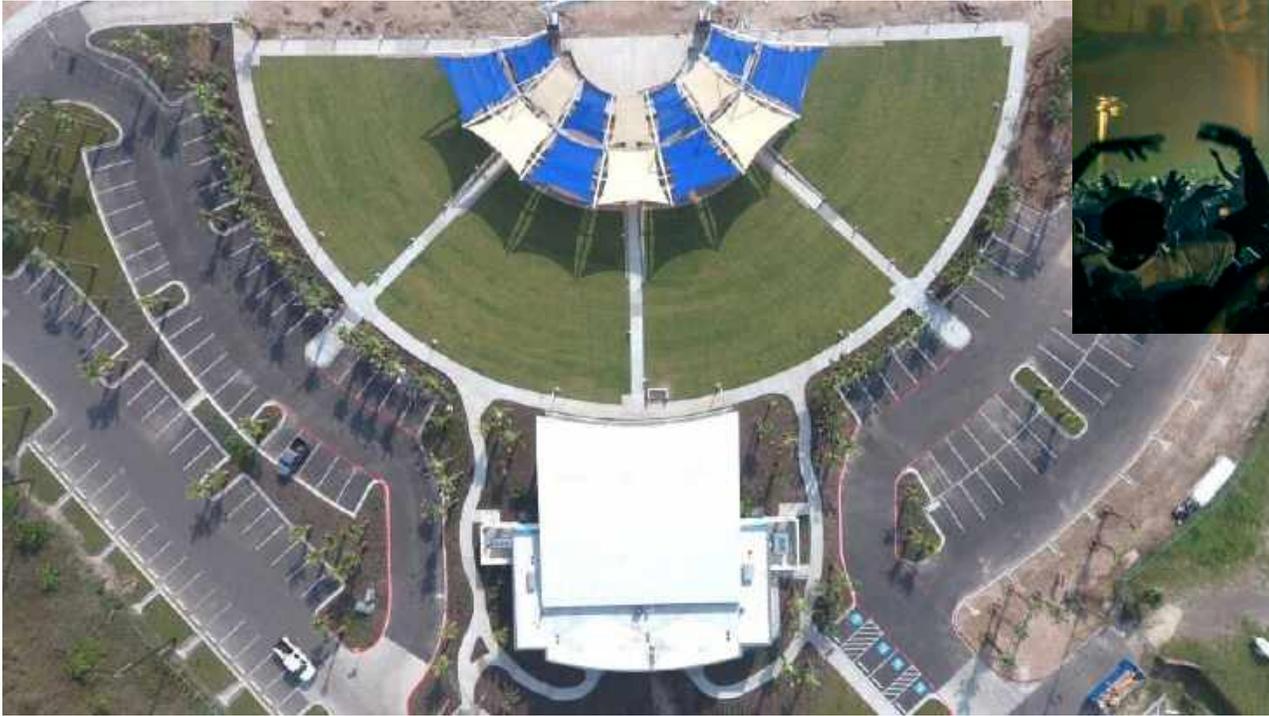
# Rockford, Illinois

Davis Park Amphitheater



# Conway, South Carolina

Riverfront Amphitheater



# South Padre Island, Texas

Amphitheater & Convention Center



# El Paso, Texas

Amphitheater & Event Center



**Why Choose Us?**

# Why Us?

- **Placemaking Grounded in Analytics & Best Practices**
- **Actionable To-Do List (not a plan that sits on a shelf)**
- **Tangible Financial Solutions w/ New York Experience**
- **Decades of Industry Experience & Lessons Learned**

## Layer Legend

### Warren County

Hexagon color

by sum of foottraffic





**Q & A**



**Thank You**



For further information about Hunden Strategic Partners, please contact:

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Hunden Strategic Partners is a full-service real estate development advisory practice specializing in destination assets.

With professionals in Chicago, San Diego and Minneapolis, HSP provides a variety of services for all stages of destination development in:

- Real Estate Market and Financial Feasibility
- Economic, Fiscal and Employment Impact Analysis (Cost/Benefit)
- Organizational Development
- Public Incentive Analysis
- Economic and Tourism Policy/Legislation Consulting
- Research and Statistical Analysis
- Developer Solicitation and Selection

The firm and its principal have performed more than 1,000 studies over the past 25 years, with more than \$10 billion in built, successful projects.