

City of Novato
Hamilton Fields Sports Park Project

Assessment of Visitation Projections

Final Report

Prepared By

The Sports Management Group



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Prepared For

The City of Novato
Parks, Recreation, & Community Services Department

By

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Introduction

The City of Novato is processing a development application for a sports complex proposed on a site on the former Hamilton Air Force Base. The City engaged the services of Victus Advisors in July 2015 to conduct an independent, objective, and research-based analysis of the potential economic and fiscal impacts of the proposed Hamilton Fields Sports Park project. The Project Applicant provided Victus Advisors with estimated annual attendance figures that served as the basis of the Victus Advisors economic and fiscal projections. The City retained the services of The Sports Management Group in December 2015 to evaluate the “reasonableness” of the projected visitation figures as projected by the Project Applicant.

Project Approach

The scope of work performed by The Sports Management Group was limited to the evaluation of visitation estimates and the estimated percentage of use by City of Novato residents. The Victus Advisors scope of work did not include market research and is based upon the Project Applicant’s market research and projections. To test the “reasonableness” of the figures, three tests were applied:

1. Using the number of available “field slots”, test the field capacity to verify that the fields can support the number of estimated visitations stated in the Victus Advisors report. Testing includes checking schedules to verify slot availability at times acceptable to the users.
2. Using the unmet “demand for field slots” identified in the *Field Needs Assessment Study (TSMG December 2015)*, test if the demand is sufficient to meet the Applicant’s estimated visitation totals.
3. Utilizing City of Novato population totals, test if the estimated percentage of participation by residents is “reasonable”.

The Sports Management Group completed the following research:

- Interviewed the Project Applicant regarding assumptions used to develop the participation figures. Identified and assessed the underlying operating assumptions.
- Analyzed the project usage and visitation figures presented in the Economic & Fiscal Impact Analysis of the Hamilton Fields Sports Park, dated November 6, 2015, by Victus Advisors.
- Prepared a “typical schedule” for fall-winter-spring and summer to test the capacity of the fields to support the projected visitations and to model the field use.
- Performed a comparative analysis of attendance figures at three similar facilities.

Project Description

- Hamilton Field Sports Park is a proposed 55-acre, state-of-the-art amateur sports and recreation complex that includes a 12-acre community park. The amenities for the Sports Park (not including the Community Park) are expected to include:
- Four (4) variable dimension youth baseball/softball fields in a cloverleaf without lights
- Four (4) full-sized multi-sport fields (soccer, lacrosse, etc.) without lights
- Regulation diamond in a 500-seat ballpark without lights
- 50,000 square foot training center
- Future home for the Marin Sports Hall of Fame
- Covered practice infield diamond
- Restrooms and concession areas

Assumptions

The visitation figures developed by the Project Applicant are based on a preliminary operating plan. To evaluate the figures, the Project Applicant was contacted and provided preliminary operating assumptions that are summarized below.

General Operating Assumptions

- Varying attendance and operating hours depending on the time of year due to primary sport playing seasons.
- Variable closing times depending on nightfall.
- Tournaments 47 weekends, with community use on weekdays.

Fee Assumptions

- The rates for field use by local teams will be the same as those charged by the City of Novato and the Novato Unified School District.

Operating Schedule

- The Training Center will be open from 9am – 8pm daily and will include major league off-season activities for professional and collegiate players. The Victus Advisors study (p. 30) identified the field operating hours as:

Jan – April	9am – 6pm	9 hours daily
May – Aug	9am – 8pm	11 hours daily
Sept – Dec	9am – 6pm	9 hours daily

- Fields open 47 weeks to accommodate holidays and inclement weather days
- 47 weekend tournaments (Saturday - Sunday + Holiday)
- 94 tournament weekend days
- 329 days annually
- 235 non-tournament weekdays

Changes to that plan will impact the use. Factors that might impact team use and visitations include fees and charges, schedule priority, existing tournament schedules, and external factors such as weather.

Projected Annual Visitations

The Project Applicant provided Victus Advisors with the following estimates of programming and use of the proposed Hamilton Fields Sports Park. Figures assume fields are not lighted.

<u>USAGE TYPE</u>	<u>ANNUAL UNIQUE DAILY USERS*</u>	<u>ANNUAL UNIQUE DAILY GUESTS</u>	<u>AVERAGE DAYS PER EVENT TYPE</u>	<u>TOTAL ANNUAL VISITOR DAYS</u>	<u>ESTIMATED % CITY RESIDENTS</u>	<u>TOTAL ANNUAL RESIDENT VISITS</u>
Lessons	6,650	6,650	1	13,300	62%	8,213
Camps/Clinics	2,100	2,100	2	8,400	56%	4,725
Tournaments	12,960	12,960	2	51,840	16%	8,294
Field Rentals	24,300	24,300	1	48,600	90%	43,740
Training Center	18,300	-	1	18,300	56%	10,294
Showcases	340	510	2	1,700	16%	272
Other Events**	-	27,000	1	27,000	45%	12,150
Ballpark	-	32,400	1	32,400	52%	16,848
Community Park	-	91,250	1	91,250	90%	82,125
TOTAL:	64,650	197,170	1.1	292,790	64%	186,661

Sources: Visitor Days via Project Applicant, Resident Visits estimated by Victus Advisors

** Users represent Athletes participating in lessons, camps, clinics, tournaments, etc.*

*** Parties, Guest Appearances, Autograph Signings, Specialized Training, etc.*

Visitation Testing

The Sports Management Group created a fall-winter-spring schedule and a summer schedule to test the visitation figures reported in the Victus study. The Sports Management Group summer schedule is 9am – 7pm (see page 34 of the Fields Needs Assessment Report, December 2015). The Victus schedule is 9am - 8pm resulting in 10 hours of additional field time per week. The operator will determine if there is sufficient daylight to safely complete a game by 8pm during the summer season and if there sufficient youth organizations willing to play after 7pm.

The school schedule consists of September through April and identifies periods of time during the school day when users other than youth teams may schedule the fields. Afterschool hours are set aside for the community youth teams, and weekends are reserved for tournaments. The summer schedule accounts for extended availability to community youth teams during the weekday and continues with tournaments on the weekends.

A practical approach to field scheduling was used to project visitations. When considered over the course of a year, the equivalent of one (1) field may not be in use due to a number of factors. This could be a baseball field, multi-purpose field, or the ballpark. For purposes of this study, the baseball field has been reduced one slot to reflect the field not in use. The factors impacting scheduling include:

- Different age level play that requires set-up of safety fencing to protect players from cross field play
- Environmental factors, such as sun orientation or other weather conditions, that limit play
- Older age groups requiring longer field dimensions
- “Resting” of one field for cleaning, maintenance purposes or use in addition to practice/game—i.e. camp, lessons, skill training
- Reducing the impact on parking and support services

To evaluate the number of sports participants and spectators, the capacity of the fields were tested using calculations based on “field slots”. Field slots are used to quantify field availability. A field slot equals 1.5 hours on average for practice and games, and 2 hours on average for tournament play. The testing calculates visitations based on the assumptions shown on the tables that follow. The *Fields Needs Assessment Study; December 2015* identified sufficient demand to fill the available slots.

Sport Field Visitations

<i>Afterschool Visitations</i>			
	Baseball Fields	Multipurpose Fields	Ballpark
Number of Fields	4	4	1
Number of Slots per Day ^A	6 ^B	8	2
Number of Visitors per Slot ^C	30	30	30
Visitations per Weekday	180	240	60
Number of Afterschool Days	160	160	160
Subtotal Visitations	28,800	38,400	9,600
Total Visitations	76,800		

<i>Summer Visitations</i>			
	Baseball Fields	Multipurpose Fields	Ballpark
Number of Fields	4	4	1
Number of Slots per Day ^A	12 ^B	16	4
Number of Visitors per Slot ^C	30	30	30
Visitations per Weekday	360	480	120
Number of Summer Days	55	55	55
Subtotal Visitations	19,800	26,400	6,600
Total Visitations	52,800		

^A 2 slots per 3 hours x number of fields

^B One baseball field taken out of use (3 total) for slot calculation to accommodate potential variations in schedule

^C 2 teams with 9 players/coach + 6 spectators per team = 30 per slot

Tournament Visitations

Tournaments are projected for 47 weekends and will either be a ball field or multi-purpose field tournament, due to parking and support services. Each slot represents two hours.

<i>Tournament Visitations</i>				
	Baseball Fields	Multipurpose Fields	Ballpark	Ballpark Spectators
Number of Fields	4	4	1	1
Number of Slots per Day ^A	12 ^B	16	4	1
Number of Visitors per Slot ^C	38	38	38	250
Number of Days in Weekend	2	2	2	1
Number of Visitors Per Weekend	912	1,216	304	250
Number of Tournament Weekends	47	47	47	47
Subtotal Visitations	42,864	57,152	14,288	11,750
Total Visitations	126,054			

^A 4 slots per field (8 hrs. daily, 2-hour slot)

^B One baseball field taken out of use (3 total) for slot calculation to accommodate potential variations in schedule

^C 2 teams with 9 players/coach + 10 spectators per team = 38

Training Facility Visitations

<i>Training Center Visitations</i>	
Visitors per Day ^A	56
Days of Operation	350
Total Visitations	19,600

^A Provided by the Project Applicant to Victus Advisors

The Sports Management Group has identified the potential use and visitation to the Sports Park and Training Center (not including Community Park estimated attendance) at 275,254, combining the sport field, tournament, and training center visitations. The annual projected usage and visitation by the Victus Advisors study is 201,540.

Community Park Visitations

Community Park is a proposed 12-acre park with a dog area, bocce courts, versa courts, picnic areas, and playground elements. The park will be open to the public and accessible on a daily basis during daylight hours. The estimated annual attendance to the park is 91,250 with a daily average of 277 park visitors based on 329 open days (same number of opened days as the sports park) for purposes of this study.

Based on the figure of 91,250 participations, the park is expected to host 48 visitors per hour during the school year for 3 hours daily and during the summer for 6 hours. Based on the variety of amenities and the all-day access, these participation numbers are achievable, as shown in the table below.

<i>Community Park Visitations</i>	
	Hours
Park Attendance – School Year	
3 hours x 180 school days	540
6 hours x 72 school weekends x 2 days	864
Park Attendance - Summer	
11 weeks x 7 days x 6 hours of use	462
Total	1,866 ^A

^A 48 visitors per hour to match the 91,250 participations

Resident Use Testing

The Assessment of Visitation Projections included a review of the allocation of resident and non-resident use (shown on page 3). There are no regional or national standards or other metrics to estimate resident use. The Project Applicant provided the projections reported in the study to Victus Advisors.

The Sports Management Group contacted the Project Applicant regarding definitions, assumptions, data sources, and approach used to develop the estimates. The estimates are based on the Project Applicant's industry experience, visitation rates reported at similar facilities, and best practices.

The Project Applicant provided the following:

- The "Ballpark" refers to the premier field with 500 spectator seats.
- The market for leagues, camps, lessons will be predominantly local
- Tournament attendance is primarily non-resident visitors.
- The attendance figures and resident distribution for camps, clinics, and lessons is based on Future Prospects, an instructional baseball program located in San Rafael.
- Attendance estimates for the Ballpark are based on the San Rafael Pacific's Baseball Team attendance distribution at Albert Park.
- Comparable facilities referenced in the study include Big League Dreams (Manteca).
- Twin Creeks Park (Sunnyvale), the Ripken Experience in Aberdeen (Maryland).

Assessment of Resident Participation Rates

The City defines a resident as a person residing within the city limits of Novato. The Sports Management Group has provided an opinion of resident participation that is limited to the population of the City of Novato. These estimates are based upon thirty years experience in the field as well as market research and findings from The Sports Management Group's previous work with the City to assess the demand for ball fields and sports fields.

The Hamilton Fields Sports Park and the Community Park are primarily intended for use by residents of the City of Novato. The framework for an agreement between the City and the Applicant provides priority use of the fields during weekdays by City of Novato youth and adult sports teams. Resident field rentals are based on the assumption that the rental rate will be the same rate as City and School District field use. City of Novato youth will benefit from lessons and clinics that will be offered to improve playing skills. On weekends there will be youth sports tournaments including both local residents and others who will be visiting from out of town, who are primarily young families with children. Residents will be the primary users of the Community

Park. The Sports Management Group’s opinion is the estimated use figures on page 3 are realistic and should reflect reasonable use by the resident community.

Comparative Analysis

Interviews were conducted with operators of facilities similar to the proposed Hamilton Sports Park. Attendance figures for the facilities are consistently high during prime time. Prime time hours are defined as afterschool from 3pm-6pm (or nightfall) and weekends from 8am – 6pm, with longer hours during the summer. Attendance estimates include non-paid access to the sports park during slow periods for pick-up games or fitness walking. Hamilton Sports Park has more acreage than several of the Sports Parks contacted. However, their projected attendance figures are lower. This suggests a conservative approach to the use and scheduling of the fields. The table on the following page provides a comparison of the facilities.

<i>Comparative Sport Parks</i>				
	SportsPlex, Santee	Big League Dreams, Manteca	Ken Mercer Sports Park, Pleasanton	Hamilton Sports Park, Novato
Est. Annual Attendance	350,000	420,000	264,000	201,540
Acres	15 acres	28 acres	103 acres	43 acres
Fields	2 Lighted Arena Soccer Fields 3 Lighted Softball Fields w/ Synthetic Turf	6 Lighted Baseball Fields 1 Indoor Multi-Purpose Field 4 Volleyball Courts	4 Lighted Grass Softball Fields 12 Multi-Purpose Fields Bocce, Basketball, Volleyball Courts	4 Baseball / Softball Fields 4 Multi-Purpose Fields 1 500-Seat Ballpark with Regulation Diamond

Attendance may be impacted by parking, field conditions (grass, synthetic, or a combination of field surfaces), and facility policies.

Findings

In the opinion of The Sports Management Group the Project Applicant’s annual visitation estimates of 201,540 to the Sports Park and 91,250 to the Community Park is conservative and attainable by Year Two of operation. The Sports Management Group concurs with the estimates for resident use.

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