

January 2015

Executive Summary & Feasibility Report

Davidson County Sports
Complex
(Davidson County, NC)

Prepared for:
Davidson County, NC

Prepared by:
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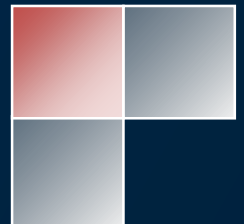


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PROJECT INTRODUCTION

The Sports Facilities Advisory (SFA) was engaged to complete an Executive Level Summary & Feasibility Report pertaining to the development of a new, best-in-class sports and events complex in Davidson County, North Carolina, that has the potential to serve the local, sub-regional, regional markets, national markets.

SFA is an independent sports facility consulting company that has provided planning, funding support, development, and management services to a portfolio of more than \$3.5 billion in planned and operational sports complexes throughout the U.S. and overseas. SFA currently provides operations and management services to more than \$100 million in community sport, sports tourism, and recreation centers. SFA has also developed industry-leading forecasting calculators which allow the firm to provide accurate financial forecasts based on market demographics, current operations, local needs, regional opportunities, comparable facilities, and emerging trends.

This document is intended to provide Davidson County's leadership group (henceforth "the project team") with SFA's initial reactions to this opportunity and to identify the factors that will impact feasibility. The pages that follow detail those factors and serve as the basis for SFA's determination of whether or not a new sports and events complex in Davidson County has the opportunity to meet the project team's "definition of success." It should be noted that this scope of work is intended to qualify the opportunity; SFA has provided the project team with an outline for a potential future scope of work that would quantify the opportunity through the development of a detailed financial forecasts and set of economic impact projections.

To date, SFA has completed the following steps:

- Completion of detailed market and industry research encompassing demographics, socioeconomics, sports participation, local sports organizations, regional inventory of sports and events assets, and regional facility competition
- Facilitation of a strategic planning session with the project team
- Facilitation of a business development planning session with more than 25 leaders from municipalities, departments, organizations, and businesses within Davidson County
- Facilitation of stakeholder interview sessions with potential end-users of the complex
- Presentation and question and answer session at an open-forum town hall meeting
- Completion of market tour of potential sites for a new facility
- Production of Executive Level Summary and Feasibility Report
- Gathering of information and data for the next scope of work

Most critically, the steps above have allowed SFA and the project team to define success for the project. In order to justify moving forward with additional analysis, a best-in-class sports and events complex in Davidson County must:

1. Improve the quality of life for the community
2. Create a driver for economic development
3. Enhance the brand of Davidson County

Based on this understanding of the purpose of the complex and the findings detailed within this document, SFA acknowledges that a new facility with the right design and product/service mix can achieve each of the success factors above. As such, SFA recommends that the project team moves forward with the next steps of the project and engages SFA for the development of a full financial forecast and economic impact study.

PREPARATION FOR SITE VISIT AND TIME ON SITE

In conducting a feasibility assessment, SFA analyzes destination factors, industry factors, and financial factors. For this scope of work, SFA created a project plan and an on-site agenda based on those factors that allowed the analysis team to prepare for the site visit and utilize the time on site to create a comprehensive understanding of the opportunity.

Pre-Visit Market Research and Analysis

In preparation for the site visit to Davidson County, SFA's team of industry experts and business analysts completed preliminary market research which included demographics, socioeconomics, national, regional, and local sports participation rates, drive-times for key market segments, existing regional event inventory, pricing studies, and the identification of local and regional service providers. Additionally, SFA held multiple conversations with representatives from Davidson County to discuss the strategy, goals, and outcomes of the site visit and this scope of work.

The goal of this research was to better understand the opportunity for developing a sports tourism asset based on who plays, what sports they play, where they play, when they play, and how much they pay to play. While much of that information is detailed in the pages that follow, some of it is compiled as raw data for use in a future financial forecast. All research and information gathered to date is available to the project team.

Site Visit

A representative from SFA traveled to Davidson County and was on location from November 18-19, 2014. While in the market, SFA and the project team completed a planning and strategy session, user group and stakeholder interviews, a town hall presentation, and a tour of potential sites for the new facility. The goal of SFA's site visit was to refine the project team's vision for the project, identify contributors and challenges to project success, and define project success.

County Planning and Strategy Session

SFA facilitated a county planning and strategy session with the project team in order to further elaborate on the vision for the project, value proposition, resources, target customers, products and services, and financial reality, among other key topics. In total, more than 25 representatives from the following organizations took part in the planning and strategy session:

- Davidson County Management
- Davidson County Planning
- Davidson County Economic Development
- Davidson County Recreation
- Davidson County Schools
- Davidson County Community College
- Lexington Tourism
- Lexington Schools
- Lexington Chamber of Commerce
- Thomasville Tourism
- Thomasville Schools
- Thomasville Chamber of Commerce
- Management and Parks and Recreation from four surrounding cities and towns

User Group/Stakeholder Interviews

Prior to traveling to Davidson County, SFA and the project team invited potential users and stakeholders from local sports organizations to take part in roundtable discussions related to the project. Attendees represented indoor court, outdoor “diamond” (baseball/softball) fields, outdoor multi-purpose fields, and equestrian user groups and organizations.

Town Hall Presentation

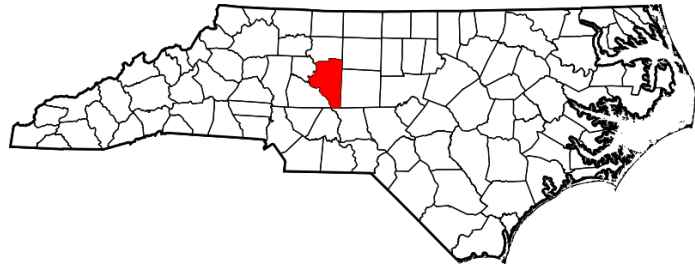
SFA facilitated a public presentation and discussion in a town hall setting. The presentation was open to the community at large and attended by roughly 60 community members. Following the presentation by SFA, a question and answer session was conducted to facilitate an open discussion about the project and SFA’s scope of work.

Local Market Tour

SFA utilized its time in Davidson County to evaluate the local elements that impact feasibility, including affordability, local attractions, existing leagues, hotel accommodations, restaurants, existing facilities, and potential site locations. In addition to analyzing the local market as a whole, SFA and the project team traveled to three potential sites for a new facility.

MARKET OVERVIEW

Davidson County has an approximate population of 163,189, and the most populous city is Thomasville with 26,757 according to the 2010 census. The county seat of Lexington encompasses a population of 18,978 according to the 2010 census.



The Piedmont Triad, which includes the north-central region of North Carolina, including Greensboro, Winston-Salem, and High Point, is the 33rd largest CSA metropolitan area in the United States with an estimated population of 1,611,243 in 2012. Interstate 85 runs through Davidson County northeast to southwest, and U.S. Route 64 runs through the County east to west. The Piedmont area includes a number of hotels, restaurants, and retail destinations that offer visitors and patrons a multitude of convenient amenities.

Davidson County has proven it can serve as a regional destination based on the popularity and success of the annual Lexington Barbecue Festival, the Davidson County Agriculture Fair, High Rock Lake for water activities, the Richard Childress Racing Museum, Richard Childress vineyard, and various parks. However, because there are only approximately 600 hotel rooms within Davidson County, surrounding municipalities enjoy the overflow from large events hosted within Davidson County.

Davidson County has a history of attracting corporate development. In 2008, Lexington and Thomasville were selected by Site Selection Magazine as the nation's top 'Micropolitan Area' for corporate projects.

Local and Sub-Regional Market Demographic Characteristics

As part of this phase of work, SFA conducted an in-depth demographic and socio-economic analysis of the local and sub-regional market. The goal of this portion of the analysis is to determine the key characteristics of the most regular users of a sports complex in Davidson County.

In accordance with the information above and to gain a comprehensive understanding of the local and sub-regional market, SFA has analyzed Davidson County in comparison with seven surrounding counties, including Davie, Forsyth, Guilford, Montgomery, Randolph, Rowan, and Stanly. A complete side-by-side analysis is included in the appendix of this document.

The chart on the following page summarizes key demographic factors for Davidson County and the two largest counties in the area: Guilford and Forsyth.

Key Demographic Factors			
Category	Davidson County	Guilford County	Forsyth County
Total Population	163,189	509,056	363,713
Projected Population Growth	4.0%	5.6%	4.9%
Median Age	41.2	36.7	37.5
Median Household Income	\$43,332	\$44,611	\$43,819
Average Expenditure: Recreation Equipment and Supplies	\$118	\$116	\$116
Average Expenditure: Entertainment	\$2,378	\$2,322	\$2,329

As demonstrated, Davidson County has a markedly smaller, older population than both Guilford County and Forsyth County. While this data could be considered a challenge to success in a complex designed to serve the local population, it should be noted that one of the primary objectives of this project is to draw people from outside the local market to play and spend in Davidson County. Being surrounded by relatively large, young populations is a positive factor for the sports travel portion of this project.

To add additional perspective to the information above and in the appendix as it relates to SFA's assessment of the market opportunity, the following information provides context for each key factor above:

- **Population Size:** With 163,000 people, SFA categorizes Davidson County as a moderately populated suburban market. The sub-region, made up of Davidson County and its seven neighboring counties, has a total population of 1,447,894 people. In most cases, a sub-regional population of more than 1 million people can support multiple tournament-ready sports and events complexes. Future work will determine the recommended mix of programs and services to create a differentiated model from the existing service providers that draw from the primary trade area.
- **Population Growth:** The areas surrounding Davidson County are poised for moderate growth in the coming years, which is a positive indicator for feasibility.
- **Age:** The median age within Davidson County is older than the national average (roughly 36.5). However, the median age within the surrounding counties is in line with the national average. This suggests pockets of older population surrounded by a young population with a high number of children, an assumption that is supported by the full demographic report in the appendix. Further work will need to be completed to determine the participation in each sport offered at new facilities.
- **Household Income:** Median household income levels within the area are well below the national average (roughly \$51,000). This indicates that portions of the population may be price sensitive and points to the need to complete a full pricing analysis in the next phase of work.
- **Average Expenditure on Similar Products/Services:** Spending on entertainment is well below the national average (roughly \$3,000) in the primary market. Spending on recreation equipment and supplies is also well below the national average (roughly \$150). These statistics also point to the need to fully understand pricing thresholds.

Regional Sports Participation

To gain an understanding of regional participation in traditional youth and amateur sports, SFA has researched the number and type of travel teams currently based in the region. Additionally, SFA has compiled details related to existing sports tournaments and events in the region, including location, dates, format, number of teams, participant ages, etc. Both data sets have been saved for use in a full financial forecast and are available for the project team upon request.

Additionally, SFA has analyzed local and regional participation rates reported the National Sporting Goods Association (NSGA) and the Sporting Goods Manufacturers Association (SGMA). These reports take into account only active sports participants who play their respective sport in an organized format a specific number of times per year.

As demonstrated in the chart to the right, basketball is the most commonly played sport in the region, but the combination of outdoor sports has the highest cumulative participation.

Sports Participation	
Sport	Registered Participant %
Baseball	3.9%
Basketball	8.9%
Football	4.5%
Soccer	4.7%
Softball	3.5%
Volleyball	2.6%
Lacrosse	0.8%
Ice Hockey	0.9%
Ice Skating	4.0%

EXISTING SERVICE PROVIDERS

While population size, demographics, socio-economics, and sports participation assist in determining the total market size, gaining a comprehensive understanding of competition from existing service providers is a vital step in determining the actual market opportunity. SFA has analyzed both local/regional facilities and best-in-class national facilities to provide the project team with an understanding of what facilities would be in direct competition with the Davidson County Sports Complex and what it would take to create a best-in-class facility.

Local and Regional Facilities

As can be expected in a market of this size, there are a number of existing tournament-ready sports facilities in the area. In order to make a preliminary assessment of opportunity for Davidson County to compete in the local and travel sports business, SFA has identified and analyzed existing service providers for local programs as well as existing tournament facilities in the region.

Based on the vision of the project team, SFA has identified three primary categories of existing service providers that impact feasibility based on their existing share of the market: court sports tournament facilities, outdoor multi-purpose field tournament facilities, and outdoor baseball/softball tournament facilities. The charts below list the names, locations, and approximate drive time distances from the proposed sites of the potential new complex in Davidson County.

Court Sports Tournament Facility	City	Drive Time
Greensboro Sportsplex	Greensboro, NC	39 min
Raleigh Convention Center	Raleigh, NC	1 hour, 50 min
Carolina Courts Indian Trail	Indian Trail, NC	1 hour, 8 min
Carolina Courts Concord	Concord, NC	45 min
Upward Star Center	Spartanburg, SC	2 hours, 4 min

Multi-Purpose Field Tournament Facility	City	Drive Time
Gary L. Pittman Memorial Park	Greenville, SC	2 hours, 22 min
Pavilion Recreation Complex	Taylors, SC	2 hours, 24 min
Mallard Creek Community Park	Charlotte, NC	52 min
Ramblewood Soccer Complex	Charlotte, NC	1 hour, 14 min
Lenoir Rotary Soccer Complex	Lenoir, NC	1 hour, 35 min
Ted Mackorell Soccer Complex	Boone, NC	1 hour, 42 min
WRAL Soccer Center	Raleigh, NC	1 hour, 45 min
Bryan Park Soccer Complex	Browns Summit, NC	47 min
Frank Liske Park	Concord, NC	51 min
Jordan Soccer Complex	Fayetteville, NC	2 hours, 10 min
BB&T Soccer Park	Advance, NC	31 min
Statesville Soccer Complex	Statesville, NC	47 min
Rocky Mount Sports Complex	Rocky Mount, NC	2 hours, 30 min
Hine Park Soccer Complex	Winston-Salem, NC	33 min
Sara Lee Soccer Complex	Winston-Salem, NC	33 min
Mesa Soccer Complex	Greer, SC	2 hours, 22 min

Baseball/Softball Tournament Facility	City	Drive Time
Lakeside Park	Piedmont, SC	2 hours, 31 min
Northwest Park	Greenville, SC	2 hours, 40 min
David Jackson Park	Taylors, SC	2 hours, 32 min
Corey Burns Park	Taylors, SC	2 hours, 29 min
Mallard Creek Community Park	Charlotte, NC	52 min
Frank Liske Park	Concord, NC	51 min
Rocky Mount Sports Complex	Rocky Mount, NC	2 hours, 30 min
Hornets Nest Park	Charlotte, NC	1 hour
Conestee Park	Greenville, SC	2 hours, 24 min

In total, 27 unique facilities were identified that have the potential to host sports tournaments on courts, multi-purpose fields, or baseball/softball diamonds, making them competitors that could impact the regional programming at a new facility in Davidson County. It is important to note that while these tournament and event facilities have been identified, there are also a variety of tournaments in the region that are held at a combination of smaller facilities not large enough to host events individually.

There are a few items to note related to competing facilities:

- The facilities above represent potential competitors in the market that are currently hosting programs, tournaments, or other events that may impact the operations at a new facility. Not all facilities will have an equal impact on the opportunity, and – depending on the final business model – some may not impact the new facility at all.
- The next steps in this process would be to further refine the list of competitors and determine their impact on a new facility’s ability to achieve financial and operational success. The factors SFA uses to perform this analysis include, but are not limited to:
 - Proximity to new facility
 - Quality of physical space
 - Pricing
 - Seasonality
 - Marketing reach and capture rate
 - Program mix and service offerings
- Specifically related to tournament and event facilities, a further analysis of the existing tournament and event inventory related to the factors below will allow SFA to quantify the opportunity for a new facility to attract existing events and create new events.
 - Existing tournament inventory
 - Locations
 - Pricing
 - Seasonality
 - Local vs. non-local participation and attendance
 - Number of teams
 - Level of competition

Best-In-Class Facilities

A primary component of the project team’s vision for the project is that the Davidson County Sports Complex must be a best-in-class facility. To provide insight as to what it means to be “best-in-class,” SFA has identified and described 11 elite facilities that overlap the potential model of the Davidson County Sports Complex.

Tyger River Park – Duncan, South Carolina

Tyger River Park is a premier tournament baseball complex with 12 fields and an additional championship stadium. The park is owned and operated by the Spartanburg County Parks Department. A nine-acre playground includes a sand pit, swings, and the spider web climber. A 60-foot high tower is in the center of the park, allowing parents view and staff to supervise park activities. The park also plans on expanding the playground by adding a splash zone.



Players can participate in tournaments or play in various leagues hosted at the complex. Tyger River Park had an estimated attendance of over 100,000, generating an estimated economic impact of \$17.6 million for Spartanburg County with an additional \$5.8 million impact on Greenville County. The National Softball Association National Championship tournament alone brought \$4.66 million for Spartanburg County and \$1.5 million for Greenville County in 2012.

Tyger River Park			
Facility Type	Amenities	Number of Events	Economic Impact
Baseball tournament facility	13 baseball diamonds	40 annually	\$23,400,000 annually

Rocky Top Sports World – Gatlinburg, Tennessee

Rocky Top Sports World is located less than 10 minutes from the entrance of the Great Smoky Mountains National Park, as well as downtown Gatlinburg. The complex includes 6 synthetic turf fields, 1 natural surface field, a championship stadium with capacity for 1,500, and an 86,000 square foot indoor court tournament facility with 6 basketball or 12 volleyball courts. Additionally, there are 4 more basketball courts and 3 more volleyball courts located on-site. The 80-acre campus is a hotspot for sports tournaments and sports tourism for the entire southeast. 1,200 parking spaces provide ample parking for visitors.



The complex will generate an estimated \$100 million of economic impact for Gatlinburg within the first five years of operation. 28 signed contracts in the first year will allow Rocky Top Sports World to surpass the city's first year goal, bringing \$19 million of economic impact in year one. The \$20 million complex was funded by a joint venture between the City of Gatlinburg and Sevier County. Rocky Top Sports World opened in July of 2014.

Rocky Top Sports World			
Facility Type	Amenities	Number of Events	Economic Impact
Outdoor multi-purpose fields; indoor sports facility	7 fields, 10 basketball, 15 volleyball	46 annually	\$23,000,000 annually

Myrtle Beach Sports Center- Myrtle Beach, South Carolina

Located in the third largest tourism destination in the United States, the Myrtle Beach Sports Center is a 100,000 square foot tournament and event facility set to open in March of 2015. The facility includes 8 basketball courts or 16 volleyball courts. The space can also be used for other events, such as mat sports, table tennis, pickle ball, tradeshow, and other group events.



The Sports Center has already signed 17 event contracts and will bring an estimated economic impact of \$13 million in the first year of operations. By year five, the center will bring an estimated impact of \$30 million, with the city receiving nearly \$570,000 in taxes. The approximate construction cost is \$13 million.

Myrtle Beach Sports Center			
Facility Type	Amenities	Number of Events	Economic Impact
Indoor sports facility	8 basketball courts, 16 volleyball courts	36 annually	\$30,000,000 annually

The Ripken Experience - Myrtle Beach, South Carolina

The Ripken Experience in Myrtle Beach consists of 9 baseball fields, with 4 being regulation-size and 5 being youth-size. The fields are modeled as replicas of historic ballparks, such as Griffith Field, Navin Field, and The Polo Grounds. The facility also offers pitching mounds, batting cages, and practice fields for training purposes.

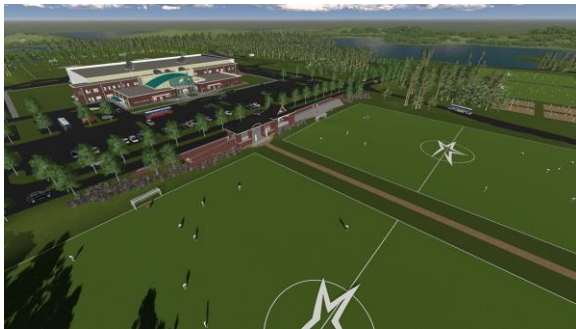


Ripken Myrtle Beach hosted 23 tournaments in 2013. The facility was constructed for \$23 million and opened in 2006.

The Ripken Experience			
Facility Type	Amenities	Number of Events	Economic Impact
Baseball tournament facility	9 baseball diamonds	23 annually	Privately held - information not available

Upward Star Center – Spartanburg, South Carolina

The 60-acre Upward Star Center includes a 120,000 square foot complex with 6 hardwood basketball courts. Upward partners with local churches to provide leagues, skill development, tournaments, and travel teams. The courts are lined to include 12 volleyball courts. The Star Center also features 4 sand volleyball courts, 4 grass fields and 2 turf fields, indoor baseball training, and personal fitness.



Project construction cost was estimated at \$19 million. There will be over 100,000 visitors in first year of operations.

Upward Star Center			
Facility Type	Amenities	Number of Events	Economic Impact
Outdoor multi-purpose fields; indoor sports facility	6 basketball courts, 12 volleyball courts, 6 fields	12+ annually	\$6 million+ annually

West Tennessee Healthcare SportsPlex - Jackson, Tennessee

The West Tennessee Healthcare SportsPlex features 17 baseball/softball fields of varying size, batting cages, and concession stands at each quad of fields. The 70 acre complex hosts approximately 40 tournaments annually, drawing an estimated 250,000 visitors per year. The complex was estimated to bring an annual economic impact of \$12.6 million annually.



The West Tennessee Healthcare SportsPlex is owned by the city of Jackson, and cost \$13.4 million to construct. The complex is estimated to bring an annual economic impact of \$12.6 million annually.

West Tennessee Healthcare SportsPlex			
Facility Type	Amenities	Number of Events	Economic Impact
Baseball tournament facility	17 baseball diamonds, batting cages	40 annually	\$12,600,000 annually

Elizabethtown Sports Park – Elizabethtown, Kentucky

Owned by the City of Elizabethtown, the 150-acre Elizabeth Town Sports Park offers visitors the chance to play on 12 baseball/softball diamonds, 13 natural turf fields, and 2 synthetic turf fields. All full-sized fields are lighted for night games. The park was designed to host national, regional, and local events. There are 6 full-service concession stands, 3 large covered pavilions with tables and seating, and 4 playgrounds for younger visitors. The park hosted 24 events in 2013.



Elizabethtown Sports Park was constructed at a cost of \$29 million, funded publicly via a restaurant sales tax. The economic impact from over 100,000 annual visitors likely exceeded \$12 million in 2013.

Elizabethtown Sports Park			
Facility Type	Amenities	Number of Events	Economic Impact
Baseball tournament facility; outdoor multi-purpose fields	12 baseball diamonds, 15 long fields	24 annually	\$12,000,000 annually

Mike Rose Soccer Complex – Memphis, Tennessee

Mike Rose Soccer Complex is a 136-acre soccer tournament complex that hosts tournaments, leagues, exhibition games, camps, clinics, academies, and special events. The complex features 16 FIFA-regulation lighted turf fields and a 2,500 capacity stadium, enabling over 22 major soccer tournaments to be hosted annually.

The soccer complex is owned by Shelby County and was built in 2001 at a total construction cost of about \$4 million. The estimated economic impact was over \$8 million as of 2012.



Mike Rose Soccer Complex			
Facility Type	Amenities	Number of Events	Economic Impact
Outdoor multi-purpose fields	16 fields	22 annually	\$8,000,000 annually

Virginia Beach Sportsplex – Virginia Beach, Virginia

The Virginia Beach Sportsplex features a 6,000 capacity three-level steel stadium with luxury suites and concessions that can be expanded to hold 17,000, as well as nine additional soccer fields. Two of those turf fields are dedicated to a regional training center for field hockey. The site also includes two baseball fields and tennis courts.



Owned by the City of Virginia Beach, the Sportsplex opened in 1999 for a total construction cost of \$6.8 million. The complex hosts an average of 33 events annually, generating an economic impact of \$46 million.

Virginia Beach Sportsplex			
Facility Type	Amenities	Number of Events	Economic Impact
Outdoor multi-purpose fields	10 fields	33 annually	\$46,000,000 annually

Overland Park Soccer Complex – Overland Park, Kansas

The Overland Park Soccer Complex is a 96-acre soccer tournament complex featuring 12 lighted regulation-size synthetic turf fields. The complex also includes nearly 1,100 square feet of meeting space, basketball and tennis courts, a skate park, and multiple playgrounds.



Overland Park Soccer Complex was scheduled to host 23 tournaments in 2014 and is expected to attract over one million visitors (players and spectators) to the complex. The complex is owned by the City of Overland Park and was constructed for \$36 million in 2009. The anticipated annual economic impact is \$24 million.

Overland Park Soccer Complex			
Facility Type	Amenities	Number of Events	Economic Impact
Outdoor multi-purpose fields	12 fields	23 annually	\$24,000,000 annually

Grand Park Athletic Complex- Myrtle Beach, South Carolina

Grand Park Athletic Complex features 7 large multi-purpose baseball fields, 2 youth fields, and 2 natural grass practice fields. 9 of the 11 fields are lighted synthetic turf fields, and are designed to accommodate a variety of sports, including baseball, softball, lacrosse, soccer and football. The complex also has a six-tunnel batting cage and three concessions areas. Games on fields the nine synthetic turf fields are streamed online, and can be viewed in real time for free or purchased at a later date.



The total development cost of Grand Park was \$21 million. This development, along with several others, helped attract nearly 2,900 teams on all of its recreation fields in 2012.

Grand Park Athletic Complex			
Facility Type	Amenities	Number of Events	Economic Impact
Outdoor multi-purpose fields; baseball tournament facility	11 fields	40 annually	Information not available

FACILITY CONCEPT & LOCATION

The vision of the project team is to create a facility and operating model that achieves all three success factors:

1. Improve the quality of life for the community
2. Create a driver for economic development
3. Enhance the brand of Davidson County

Because of those broad factors and the project team's willingness to consider any model that meets all three goals, the Davidson County Sports Complex may include one or more components that are right-sized to the market and the opportunity. The information below provides a brief insight to the potential amenities featured at the Complex, an overview of potential site locations, and an in-depth description of the business model that would need to be implemented in order to optimize operations and achieve success.

Facility Concept

As discussed in the project introduction, the concept for the facility is not yet developed but may have several potential amenities that meet the goals of the County. While this scope of work is intended to identify the opportunity to achieve the County's definition of success and not intended to recommend a facility program, SFA has identified several components to analyze in its future scope of work.

Indoor Facility

The indoor analysis is anticipated to include six to eight basketball courts, with the ability to accommodate eight to sixteen volleyball courts. The analysis will ensure the facility is planned to maximize flexibility to host all indoor events, including but not limited to wrestling, gymnastics, martial arts, table sports, badminton, pickle ball, etc. The indoor facility will have the ability to include flexible seating and could be designed to host large spectator events, including high school graduations, concerts, etc.

Outdoor Facility – Diamond Fields

The outdoor analysis of diamond fields is anticipated to include five to ten baseball/softball fields designed to maximize flexibility for tournaments by incorporating adjustable base paths and temporary fences. The analysis will ensure the fields are planned to host all youth baseball and softball tournaments across a multitude of national governing body regulations as well as consider the value of designing fields that can host full-size (400' fence) baseball fields. Additionally, a championship field with upgraded amenities and expanded seating will be analyzed.

Outdoor Facility – Multi-Purpose Fields

The outdoor analysis of multi-purpose fields is anticipated to include eight to sixteen multi-purpose fields designed to accommodate soccer and lacrosse with the flexibility to host additional outdoor events including but not limited to football, ultimate Frisbee, Quidditch, etc. The fields are anticipated to all be regulation size (300-360' length) and be designed to maximize the opportunity to host youth teams on smaller configurations. As with the diamond field analysis, a championship field with upgraded amenities and expanded seating will be analyzed.

Outdoor Facility – Adventure/Lifestyle Amenities

Although not a primary focus at this point, SFA will also analyze the opportunity to develop outdoor adventure components that capitalize on access to unique geographic features

within/proximate to Davidson County. In particular, the adventure component should take advantage of opportunities to run, hike, bike, and access waterways. The outdoor adventure components may be supported and/or rounded out by the development of unique, differentiating amenities including but not limited to canopy tours, mountain biking paths, bicycle tracks, an outdoor velodrome, etc.

In all cases, the County's vision is to develop the best asset or combination of assets that are multi-purpose and multi-generational, and can serve residents and guests alike in a safe, fun, supported environment. Based on the potential in the market, the cost to develop best-in-class facilities, and the current inventory of support service providers (most notably lodging providers), SFA anticipates that the next scope of work will result in a final recommendation of a phased approach to development.

Potential Sites

Prior to SFA's visit to Davidson County, the project team provided SFA with three possible site locations for the development of the Davidson County Sports Complex. It should be noted that although these locations have been identified and preliminarily analyzed, no decision has been made about the location; furthermore, the final location may not be any of the three locations below.

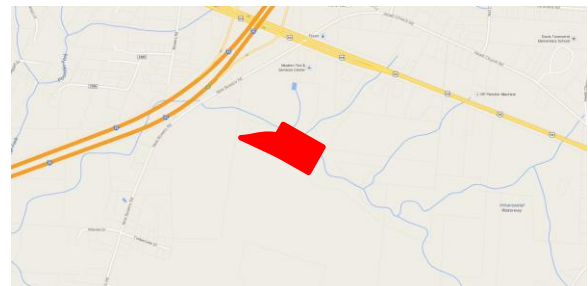
"The Davidson County Community College Site"

One possible location is on land owned by Davidson County Community College and is located adjacent to the College. This site is near Lexington and relatively centrally located within Davidson County. Proximity to (and potentially direct access to) Lake Thom-A-Lex would provide a possible tie-in to a unique outdoor adventure component. Additionally, the opportunity to partner with Davidson County Community College for operations, maintenance, events, tournaments, campus recreation, etc. could be a tremendous benefit for the facility.



"The Harris Site"

Another possible location is the located just off of off I-64 and near I-85. The site is owned by the Harris family, and additional land beyond the 60-acre plot outlined at the right may be available. Proximity to two major thoroughfares in Davidson County creates a potential advantage for accessibility and visibility, which are two primary factors in creating a best-in-class experience for guests.



"The Coble Dairy Farms Site"

A third possible location is the Coble Dairy Farms property. While the site is no longer used for farming, the property has retained most of its flat grading and is large enough to create a full campus of indoor and outdoor sports and adventure components while providing additional land for supporting developments.



Each site has advantages and potential challenges that may or may not impact the final operational forecast. In order to determine the best site, a future scope of work will need to be conducted that analyzes each location for its ability to support the final business model. To make that determination, SFA looks at 25 factors of site selection, including but not limited to:

- Cost of acquisition
- Cost of site development
- Access to utilities and cost to bring access, if necessary
- Proximity to support service providers (hotels, restaurants, etc.)
- Proximity to major thoroughfares
- Accessibility
- Visibility

Business Model

In order to achieve the project team's definition of success, The Davidson County Sports Complex business model will need to feature a diverse product/service mix focused on the ability to serve the sports and recreation needs of the local community and the ability to attract and retain regional sports events.

Regardless of the final mix of physical spaces, SFA has identified the need for the complex to operate on a business model that provides team and individual instruction/training, camps, clinics, leagues, and tournaments in a variety of sports while simultaneously creating the opportunity to use the space for any non-sports events that create an opportunity to contribute to operations. By creating this flexible business model, the complex can become a hub of activity for the local area and the region, providing a complete family experience that promotes competition, involvement, entertainment, and participation.

SFA has provided some general guidelines and recommendations for the business model below:

- Spaces and programs should be developed to create a regional appeal
- The facility should be designed to serve the local community in ways that it is currently underserved
- A specific schedule for local vs. tournament use should be developed to ensure operational efficiency and maximization of revenue-generating opportunities
- A market-driven approach should be taken to "right size" the facility for both type and number of amenities
- The facility should focus on in-house programming with a mix of facility-organized tournaments, leagues, and other programs
- Additional inventory of time should be backfilled with contract rentals
- Conventions, tradeshow, and other large events should be targeted in addition to sports tournaments
- The management team should formalize relationships with area organizations, schools, and state/regional/national organizing bodies in order to maximize the opportunity to generate revenue
- There should be a cross-utilization of outdoor space to create additional opportunities, such as:
 - Water sports, including fishing, kayaking, paddle-boarding, etc.
 - Trail sports, including biking, hiking, etc.
 - Open land sports, including, adventure races, endurance races, etc.

As mentioned above, the Davidson County Sports Complex will have to create balance of local and regional utilization in order to achieve success. Those program types often use the same spaces, but they are very different in the way programs are developed, their time and inventory requirements, and the way in which they generate revenue for the facility and the community.

If engaged for the future scope of work (which will lead to the operational forecast of a recommended facility), SFA will address the balance of local and regional programming. Below is an explanation of each type of program.

Local Model

The local model is designed as a hub for the area with the intention of serving as a community asset providing sports, recreation, youth development, and educational services. In order to accomplish this goal, it is encouraged that the facility develops its own program options and partners with existing community organizations such as Parks & Recreation, existing program providers, and coaches. By creating partnerships with groups and people who have the ability to bring existing teams/user groups to the facility, the facility will immediately host multiple activities and serve a wide range of community pursuits.

During peak hours (after school/work and on the weekends), the Complex may offer indoor and outdoor instructional clinics, leagues, tournaments, classes, and other programs for the following any or all of the following activities:

- | | | |
|-----------------|-----------------|--------------------|
| • Basketball | • Lacrosse | • Family |
| • Volleyball | • Football | Entertainment |
| • Court Events | • Field Hockey | • Adventure |
| • Court Rentals | • Baseball | Recreation |
| • Wrestling | • Softball | • Fitness & |
| • Cheerleading | • Field Events | Training |
| • Soccer | • Field Rentals | • Birthday Parties |

In many cases, sustainability hinges on a facility's ability to serve the community during non-peak hours and seasons (during the school/work day, in between seasons, etc.). In order to maximize utilization and revenue from the local model, the Complex will have to develop opportunities to for locals to participate in ways beyond the traditional opportunities above. These non-peak opportunities should feature:

- Child development programs
- Half-day and full-day camps
- Teen-centric afternoon activities, events, and offerings
- Family event nights
- Field trips, lock-ins, end-of-year/ graduation parties
- Open play
- Special events and conventions
- Corporate/group teambuilding for event/convention guests and local businesses
- After-hours social hours for event and convention guests

Sports Tourism Model

The goal of a sports tourism model is to attract teams, players, and spectators to the market to generate revenue for the facility and to create economic impact through direct spending in the community. Within the sports tourism model, there are two primary ways of developing

tournaments: creating in-house tournaments and outsourcing tournaments to existing organizers/rights holders.

In-house tournaments require a significant amount of time, energy, and resources to develop and execute. This type of event requires the facility to market the event, register teams, secure hotels, train staff, hire officials, manage play, etc. As such, significant revenue can be generated but the cost of doing business is high. Additionally, tournaments typically take multiple years to grow, so first-year (and often second-year) events are small, marginally profitable, and create a minimal economic impact.

Outsourced tournaments require much less work on the part of the facility because inventory is rented to a tournament provider who is in charge of securing teams and running the event. Outsourced tournaments often provide significantly greater economic impact in the early years of operation because they are often already established with a history of participation, so there are more teams in attendance. However, the amount of money the facility can generate on an outsourced tournament is limited because the rights holder, not the facility, collects all team registration fees and often collects additional revenue streams, such as hotel rebates and gate fees.

In order to achieve the ideal balance of revenue generation for the facility and direct spending in the community, the facility should strive for a nearly equal mix of in-house tournaments and outsourced tournaments at maturity. That said, in the early years of operation the facility will likely feature a significantly higher number of outsourced tournaments than in-house tournaments.

Program Mix

In both local and sports tourism models, SFA recommends a facility program mix that is more heavily focused on internal or in-house programs than on rental or outside service provider programs. While SFA recognizes the value of relationships with existing service providers and local sports organizations, in-house programming presents the facility with the following growth and business development opportunities:

- **Greater Ownership of the Business:** Running in-house programs will allow the management team to dictate all aspects of the products and services being offered in the facility. This ownership provides the ability to make decisions regarding marketing, sales, and operations of all programs. Furthermore, the facility will rely less on the skills, experience, and relationships of outside people or organizations and therefore strengthen the facility's ability to offer best-in-class services to its customers.
- **Control of the Customer Experience:** All programs are a reflection of the facility and will affect customer perception of the brand of Davidson County. With a rental model, a facility has a minimal level of control over program quality and customer experience. If a program run by an outside organization does not meet customer expectations, the facility and Davidson County will be directly associated with that bad experience. On the other hand, internal programs allow the facility to control the quality of a customer's experience.
- **Higher Financial Returns:** Rental programs are limited in the level of revenue they are able to generate. This relatively flat revenue restricts the ability to capitalize on growth opportunities. An internally programmed business creates the opportunity for the facility to grow service offerings and increase the amount of revenue that can be generated per hour. With the proper investment and development into in-house programs, the facility will be able to generate significantly higher levels of revenue.

- **Facility Database and Cross Marketing:** Internal programming presents the facility with the opportunity to build an extensive internal database of its customers. Owning and running in-house programs will allow the facility to capture and retain important customer contact information. This internal database will create a platform for the management team to cross-market appropriate programs to people who are already customers and invested in taking part in the products and services that the facility has to offer. The ability to cross-market to an internal database is substantially more effective than many traditional marketing initiatives.
- **Ability to Maximize Scheduling:** A rental-only model restricts the management team's ability to maximize program scheduling. This is a result of the desire of outside programmers and rentals to purchase only the "prime" hours in the facility. With an in-house program model, the management team will be able to dictate the day and time that programs are run and therefore allow the facility to maximize the use of available scheduling time.

A gradual transition towards a higher level of internal programming following opening will allow the facility to maintain relationships and utilize outside programming during the maturation process. As the facility matures, shifting to an increased level and focus on internal programs will allow the facility to capitalize on opportunities to grow programs and contribute to a higher level of financial sustainability.

STATE OF THE SPORTS TOURISM INDUSTRY

In today's youth sports landscape, the number of youth sports tournaments and events is increasing by 5-10% each year. This is due to the continued development of competitive travel sports, wherein players are participating in their sport(s) of choice year-round and competing in anywhere from eight to 30 tournaments annually, depending on the sport.

As such, sports tourism – or travel sports – is the fastest growing segment of the sports, recreation, and tourism industries. According to Sports Travel Magazine, sports tourism accounts for \$200 billion annually and was the only sector of the tourism industry to grow in every year during the recent recession. In 2012, 27% of all family trips taken were centered on a sports event.

In the past two decades there has been incredible growth in the number and availability of tournament-ready facilities. In the 1980s and 1990s, amateur tournament facilities were primarily confined to well-known destinations that possessed one-of-a-kind attractions such as the Baseball Hall of Fame and Disney World. In the late 1990s, municipalities and communities across the country began packaging their various sports assets together in an effort to host and attract large events that needed multiple – and often dozens – of fields. Today, the most progressive cities and counties are developing their own facilities, creating best-in-class competition venues that bring thousands of visitors and millions of dollars of direct spending.

The chart below shows general statistics for youth and amateur sports participation and serves to validate the reason travel sports is such a significant business in today's world.

Youth Sport Statistics (Ages 5-18)	Data
Number of kids who play organized sports each year	35 Million
Percent of kids who play sports outside of school	60%
Percent of boys who play organized sports	66%
Percent of girls who play organized sports	52%
Percent of coaches who are dads coaching their own kids	85%
Percent of corporation executives who played sports	73%
High School Sports Statistics	Data
Number of boys playing high school soccer	284,000
Number of girls playing high school soccer	209,000
Number of boys playing high school football	1 Million
Number of boys playing high school basketball	500,000
Female Sports Statistics	
Female high school athletes are 92% less likely to get involved with drugs	
Female high school athletes are 80% less likely to get pregnant	
Female high school athletes are 3 times more likely to graduate than non-athletes	
Odds of Going Pro	Odds
Odds of a High School football player making it to the NFL	1 in 6,000
Odds of a High School basketball player making it to the NBA	1 in 10,000
Odds of a High School soccer player receiving a full scholarship to a Division I or II School	1 in 90

SPORTS TOURISM FEASIBILITY ANALYSIS

In order to achieve success, and particularly to capitalize on the growth of sports tourism described above, Davidson County will have to develop a model that takes advantage of existing strengths of Davidson County as a destination and mitigates the challenges that Davidson County will have in competing with other sports tournament locations.

SFA has created a unique, proprietary analysis for determining feasibility in this preliminary stage of the project. The analysis is based on successful sports tourism facilities across the country and SFA's vast experience in planning, opening, and managing facilities that host competitive sports tournaments and events throughout the year. Included in the analysis are a total of 22 factors across four general categories, including destination, industry, financial, and facility-based factors.

To determine the feasibility of creating a sports tourism complex, SFA grades each factor individually based on a rating of "none," "weak," "moderate," "strong," or "game-changer." Using a weighted system to convert the ratings to numeric scores based on the proportional impact of each factor on overall facility performance, SFA gives a total score for the opportunity.

At this phase of analysis, SFA evaluates, rates, and scores the first 16 factors across the first three categories and provides a score based on a scale of 0-200. The six factors in the "facility-based factors" section come from the operating model, which will be created in the future financial forecast scope of work.

The total score, what the score means, and what the score suggests needs to be done in order to achieve success is included at the end of this section; prior to that, each of the first 16 factors is defined, detailed, and rated below.

Destination Factors

Accessibility

Definition: Ease of access to the market based on location, major roadways, proximity to major markets, proximity to airports, etc.

Details: Interstate 85 runs directly through the center of Davidson County connecting the area to Greensboro to the northeast and Charlotte to the southwest. U.S. Route 52 runs south from Winston-Salem through the heart of Davidson County and joins I-85. In addition to those major arteries, a variety of other U.S. Routes and State Routes run through Davidson County and connect the area to I-40, I-77, I-74, and I-73. This presence of major highways makes Davidson County a convenient destination from large competitive sports markets such as Atlanta, GA, Knoxville, TN, Richmond, VA, Columbia, SC, Greenville, SC, Charlotte, NC, Greensboro, NC, Raleigh-Durham, NC, and Asheville, NC.

Rating: Strong

Affordability

Definition: Cost to visit for a family/team, primarily dependent on hotel room rates and inclusive of dining costs, entertainment costs, gas costs, etc.

Details: Youth and amateur sports tourism participants vary greatly in their price sensitivities, but in general they look for a range of options from \$60-\$120 per hotel night and \$8-\$20 per meal. The average daily rate (ADR) in Davidson County is approximately \$75, which is in line with the rates ADR most non-local visitors seek. That said, Davidson County lacks a high volume of hotels and restaurants in the upper-end of the typical ranges; that impact is weighed in other factors and does not detract from the affordability score.

Rating: Strong

Area Attractions

Definition: Opportunities to participate in family and/or team activities away from the sports complex, including entertainment, shopping, etc.

Details: While Davidson County has successful events on select weekends throughout the year and has a few unique attractions (most notably Richard Childress Racing Museum and various vineyards), there are limited family entertainment and retail options that can be enjoyed during a 2-3 hour period of time before, between, or after games.

Rating: Weak

Community Support - Institutional Alliances

Definition: Participation, support, and backing of influential organizations that can offer funding, land, and/or bolster social capital, operations, etc.

Details: The project team and SFA have identified and/or held preliminary conversations with representatives from various local governments, economic development committees, schools, recreation managers, etc. While levels of support have not yet been defined, there is a great deal of momentum for the project based on the enthusiasm of the groups that have been consulted with thus far.

Rating: Strong

Community Support - Sport Participation and Leagues

Definition: Existence of and support from youth and adult sports leagues that can offer operational support, tournament hosting services, event volunteers, etc. and will purchase inventory of time during weekday programs at a fair market rate.

Details: Based on conversations with potential end-users, there is both support for and concern with the potential to develop a new sports complex. Support comes from groups who recognize the clear lack of best-in-class amenities available within Davidson County; concern comes from groups who are sensitive to the location of the facility as it relates to accessibility and future development as well as groups who are currently involved in hosting tournaments and events that would lose some of the leverage and potential price advantages they have created at existing local facilities.

Rating: Strong

Hotel Accommodations/Lodging Participation

Definition: Inventory of rooms, variety of property types, variety of pricing, established systems for event hosting, rebate history, etc.

Details: Although there is not definitive data available because of a lack of participation in previous efforts to clearly define lodging inventory in Davidson County, through representation within the stakeholder meeting session it was reported that there are approximately 600 hotel rooms in Davidson County. Multiple groups expressed concern that not all of the existing hotel rooms are of the quality and/or reputation necessary to create an appealing destination.

Rating: Weak

Reputation

Definition: Perception of the destination's ability to host sports, events, entertainment, recreation, etc. based on existing events, historic growth, repeat business, etc.

Details: The Barbecue Festival is a proven, successful event for Davidson County and points to the ability of County to develop a reputation for hosting non-local guests. Specifically related to this opportunity, there are a few successful baseball and softball events but no established reputation for multi-use field sports events or indoor sports events.

Rating: Weak

Restaurants

Definition: Variety of family-friendly dining options at a variety of price levels.

Details: Davidson County has a mix of restaurants and dining options across multiple price points. Downtown Lexington and Thomasville each have a few unique local dining establishments that could host large groups. There is a regional reputation for great barbecue, and several locally-known restaurants could help to bolster Davidson County's reputation a desirable destination to eat.

Rating: Moderate

Weather

Definition: Year-round playability based on heat, snow, rainfall, etc.

Details: Davidson County weather is characterized by hot summers with an average high temperature of 80 degrees and mild winters with an average high temperature of 57 degrees. The "warm" season lasts from the end of May until the beginning of September while the "cold" season lasts from the beginning of December to the end of February. Precipitation is moderate, with a 40% average chance of precipitation occurring at some point during any given day throughout the "warm" season.

Rating: Strong

Industry Factors

Existing Events – Local

Definition: Relevant sports tournaments/events in the local market that can be brought into a new facility.

Details: There are a limited number of existing local tournaments in Davidson County that could be brought into a new facility. Some existing baseball and softball events may be interested in transferring to a new best-in-class facility, but the majority of events would be new to Davidson County. While this is not a negative factor (since the goal of a sports tourism model is to create new visitors), the fact that only a few sports are currently represented means that exposure to new visitors will be time consuming and require financial resources for marketing and business development.

Rating: Weak

Existing Events – Regional

Definition: Relevant sports tournaments/events in the regional market that can be competed for and/or expanded in a new facility.

Details: Because of strong regional participation in youth sports and year-round playability for outdoor sports and adventure/lifestyle activities, the region surrounding Davidson County sees hundreds of tournaments across the sports that could be featured at the Davidson County Sports Complex.

Rating: Strong

Opportunity Relative to Competing Facilities

Definition: Quality of local/regional facilities that would compete for events.

Details: As can be expected with a strong regional events basis, there are several tournament-ready facilities (listed in the market study section of this report). While many of those facilities are not classified as “best-in-class,” several are. Most notably, the region has seen three new premier indoor court-based facilities begin booking events over the last 24 months, meaning the greatest opportunity for Davidson County is more likely to exist on outdoor programming.

Rating: Moderate

Opportunity Relative to Competing Markets

Definition: Attractiveness of the destination compared to other regional markets that would compete for events.

Details: Similar to the competing facilities factor, there is a wide range in quality of competing markets. Because Davidson County does not have a strong position based on existing events and lacks the hotel inventory to compete with major markets that can offer convenient accommodations for all participants, Davidson County will need to build its opportunity relative to larger markets in the pre-opening and early years of operations.

Rating: Weak

Financial Factors

Financial Performance Expectations Relative to Opportunity

Definition: Opportunity to operate at a subsidized/sustainable/profitable level per the expectations of the project team.

Details: Based on this business model, which requires a best-in-class facility built large enough to attract regional tournaments and events, SFA does not believe the Davidson County Sports Complex will be able to operate at a self-sustaining level. This assertion was a central conversation point in discussions with the project team, and it is clear based on those discussions that the project expects to offset some operational costs so long as the economic impact of the Complex justifies the investment in operations.

Rating: Strong

Funding - Construction

Definition: Opportunity to fund a facility that is in line with the vision and size expectations of the project team through any combination of viable funding sources.

Details: As of this report, no funding has been set aside or approved for this project. However, the project team reports that the Davidson County administration has been fiscally responsible in the past and anticipates there are several options for funding, depending on the cost and financial performance of the Complex.

Rating: Moderate

Funding - Ongoing Operations

Definition: Opportunity to provide financial support for ongoing operations from opening through sustainability.

Details: As with construction, no funding sources have been officially identified for ongoing operational support. That said, the project team expects there to be some level of ongoing support required and anticipates that the County will be able to identify a source.

Score: Moderate

As stated above, SFA uses a proprietary system to weigh the feasibility factors above and create a total preliminary feasibility score. The total score reveals the likelihood the facility would be considered viable and assists in identifying ways in which the facility can be planned and developed to increase performance. It is important to note this is a preliminary analysis and could be subject to change following further review with the project team and through the process of creating a full financial forecast.

SFA's scoring system categorizes the overall opportunity in one of four categories: "none," "weak," "moderate," and "strong." The chart below provides the numerical score range for the opportunity as a whole.

None	Weak	Moderate	Strong
0-50	51-100	101-150	150+

Davidson County scores a **105** on this scale, making this project - as it currently stands and at this stage of analysis - a low-moderate sports tourism opportunity. For reference, 70% of destinations SFA analyzes fall within the weak or moderate ranges.

In order to achieve a final recommendation to move forward with the development of a sports tourism facility, Davidson County must elevate the opportunity from “moderate” to “strong.” The primary way to do that is through the facility itself.

As referenced above, SFA’s proprietary analysis includes a fourth category of factors that cannot be evaluated without developing a facility program and creating an operating model. The category is called “facility-based factors,” and the factors include

- Business Development Resources – the human and financial resources dedicated to securing and servicing business.
- Competition Venue – the quality of the facility in terms of playing areas, spectator areas, convenience, amenities, etc.
- Execution of a Unique Vision – the implementation of a plan or creation of an environment that enables the facility to stand for something.
- Key Differentiators – the identification of and focus on elements that makes the experience different from any other competing venue.
- Management – the quality and experience level of the people or group charged with setting and achieving operational goals.
- Value Proposition – the element or set of elements that makes the facility more valuable for people than any other competing venue.

The total impact of those factors in the opportunity score is up to 50 points, meaning that a well-planned, differentiated, expertly-managed facility could transform Davidson County from a moderate sports tourism market to a strong sports tourism market.

It should be noted that an adjustment to other factors could further strengthen or weaken the opportunity. For example, if a funding mechanism is secured to guarantee construction costs would be covered up to a certain dollar amount, the score of 105 could move up to as much as eight points. Alternatively, if the strong institutional alliances described above cease to support the project and the rating drops from “strong” to “weak,” the opportunity score would decrease by eight points.

This analysis is not intended to provide a final recommendation or to reveal any operating performance, but rather is used by SFA as a key factor in determining whether the definition of success can be met and – if so – whether or not it is recommended to move forward with a full financial forecast.

CONCLUSION & NEXT STEPS

Based on the detail in the preceding pages, the vision of the project team, the support of administrators and residents within Davidson County, and the opportunity to compete in the local and regional sports industry, SFA believes there is an opportunity for a new complex in Davidson County to:

1. Improve the quality of life for the community
2. Create a driver for economic development
3. Enhance the brand of Davidson County

The concept that the project team has shared with SFA has, in other markets, served as a catalyst for improving perceived quality of life within a community, an economic development driver by assisting in attracting and retaining additional businesses, and a factor in improving the brand of the market.

In order to determine feasibility and make the recommendation for moving forward with the next phase of work, SFA has completed the following steps:

- Completion of detailed market and industry research encompassing demographics, socioeconomics, sports participation, local sports organizations, regional inventory of sports and events assets, and regional facility competition
- Facilitation of a strategic planning session with the project team
- Facilitation of a business development planning session with more than 25 leaders from municipalities, departments, organizations, and businesses within Davidson County
- Facilitation of stakeholder interview sessions with potential end-users of the complex
- Presentation and questions and answer session at an open-forum town hall meeting
- Completion of market tour of potential sites for a new facility
- Production of Executive Level Summary and Feasibility Report
- Gathering of information and data for the next scope of work

NEXT STEPS

If the project team chooses to move forward with the next step in the project as originally outlined in SFA's proposal, the following steps would be taken:

- Create a facility program that outlines the spaces to be analyzed and the projected costs to develop those spaces
- Complete an analysis to determine the demand for each amenity and the capture rate potential for the facility
- Determine the appropriate price structure for all programs and services offered
- Produce a forecast of programming revenue and expenses
- Determine the five-year growth rate for each program
- Right-size the facility program based on financial performance and utilization
- Determine the appropriate management structure for the facility
- Project the facility and operating expenses associated with the facility
- Finalize the five-year financial forecast

SFA is honored to work with Davidson County on the development of the Davidson County Sports Complex. We are looking forward to the next steps and will be proud to serve the project team with excellence.

Appendix

TOURNAMENT RESEARCH DATA

1. Baseball/Softball Tournaments and Events

The following is a sampling of current and past baseball/ softball tournaments and events in the region. Details on this page break down the type of tournament, locations, number of teams, cost, length, seasonality, and level of play.

Tournament Name	Location	Length	Dates	Price	Teams	Level
11th Annual Grand Slam Championship	Charlotte, NC	2 days	3/8-3/9	310-385	51	U8-U13
2015 "Total Control" "March Madness Event "	Rocky Mount, NC	2 days	3/21-3/22	250-400		
2015 New Top Gun "Battle of the Borders"	Rocky Mount, NC	2 days	4/11-4/12	275-425		
2015 New Top Gun Zone World Series Qualifier	Rocky Mount, NC	2 days	5/30-5/31	275-425		
2015 Top Gun "Line Drive Dual" All Star Weekend	Concord, NC	2 days	6/13-6/14	250-300		
2015 Top Gun "Summer World Series" and "Player Individual Showcase"	Rocky Mount, NC	3 days	6/20-6/22	250-650		
2015 Top Gun 4th Annual Battle for the Bats	Waterborough, SC	2 days	5/16-5/17	250-400		
3rd Annual Clemmons AAU Season Opener	Clemmons, NC	2 day	3/1-3/2	210-445	18	9U-14U
4th Annual Oxford Ring Super Regional	Oxford, NC	2 days	3/22-3/23	210-445	33	9U-13U
4th Annual Spring Into Summer Classic	Lexington, SC	2 days	5/30-5/31	150-275		
5th Annual SPRING BATTLE OF THE BATS	Concord, NC	2 days	4/16-4/17	200-300		
9th Annual Triple Play Challenge	Charlotte, NC	2 days	9/20-9/21	350-450	134	U9-U19
AAU Ring Championship	Oxford, NC	2 days	10/19-10/20	210-445	35	9U-13U
April Baseball Classic	Clemmons/Lexington, NC	2 days	4/5-4/6	210-445	32	8U-13U
ASA Cystic Fibrosis Foundation Benefit	Roanoke, VA	2 days	5/2-5/3	385		
ASA/USA 14U Region 3 & Open National Qualifier	Disputanta, VA	3 days	6/26-6/28	495		
Battle of the Bats	Rocky Mount, NC	2 days	6/7-6/8	360-435	32	U8-U13
Battle of the Carolinas	Charlotte, NC	2 days	3/1-3/2	360-410	38	U9-U14
Beast of the East (Fall) Super NIT - Central (USSSA)	Greensboro, NC	3 days	10/31-11/2	350-465	91	9U-14U
Big East Baseball Championship	Wilson, NC	2 days	8/23-8/24		34	U9-U14
Big East Show Down	Snow Hill, NC	2 days	9/6-9/7		13	U8-U13
Blue Ridge Fall Bash	Canton/Asheville/Hendersonville	2 days	9/13-9/14	175-395	48	8U-15U
Boo On The Diamond Classic - Greensboro	Greensboro, NC	2 days	10/25-10/26	250-450	34	11U-HS
Capital City Sunday Championship Series 1	Wake Forest, NC	1 day	7-Sep		21	U8-U14
Capital City Sunday Championship Series 2	Wake Forest, NC	1 day	14-Sep		18	U10-U14
Central AAU Fall State	Clemmons/Lexington, NC	2 days	10/5-10/6	210-445	26	9U-14U
Clemmons Ring Super Regional	Clemmons, NC	4 days	9/28-10/1	210-445	32	8U-14U
Clemmons Super Regional	Clemmons, NC	2 days	4/24-4/25	210-445	32	8U-14U
Combat/Rawlings Battle of the Bats Championship (USSSA)	Charlotte, Greensboro, NC	3 days	11/14-11/16	250-425	66	9U-16U
Covington Clash One Day (USSSA)	Covington, VA	1 day	15-Mar	125		

1. Baseball/Softball Tournaments and Events Continued

Crystal Coast Wood Bat National Championships	Morehead City, NC	4 days	7/24-7/27	695	76	U8-U15
CVA Open State Championships	Petersburg, VA	2 days	6/27-6/28	250-475		
Diamond Duel Waverly	Waverly, VA	1 day	26-Apr	250		
Dog Daze of Summer	Charlotte, NC	2 days	8/9-8/10	350-450	16	U12-U18
East Coast Ring Classic	Clemmons, NC	2 days	7/26-7/27	210-445	21	8U-13U
East Coast Select National Championships	Rocky Mount, NC	4 days	7/17-7/20	695	7	U8-U10
End of Summer Super Regional	Charlotte NC	2 days	8/23-8/24	400-500	59	U9-U18
Fall State Championship of the Carolinas	Charlotte, NC	2 days	8/27-8/28	350-500	122	U8-U18
GameOn Winter World Series 2015	Oxford/Butner, NC	2 days	11/8-11/9	Package	41	8U-16U
Gatorade Ultimate Spring Super Regional	Charlotte, NC	2 days	3/15-3/16	360-435	71	U8-U13
Gatorade Ultimate Super Regional	Charlotte, NC	2 days	11/15-11/16	165-425	20	U8-U13
Greater Charlotte Baseball Championship Ultimate Super Regional	Charlotte, NC	2 days	10/18-10/19	350-500	110	U8-U18
Labor Day Super Challenge	Charlotte NC	2 days	8/30-8/31	350-400	12	U12-U14
May Ring Super Regional	Clemmons/Lexington, NC	2 days	5/17-5/18	210-445	51	8U-13U
Metrolina Fall Championship	Charlotte, NC	2 days	10/11-10/12	350-450	111	U9-U18
Mid-Atlantic Championships	Rock Hill, SC	2 days	7/25-7/26	150-285		
Nations Baseball Elite	Charlotte, NC	3 days	7/12-7/14	495		
Nations Baseball Select Division	Rocky Mount, NC	3 days	7/19-7/21	495		
Nations Grand Slam Ultimate Super Regional	Rocky Mount, NC	2 days	8/27-8/28	360-460	47	U8-U14
NC AAU Super State (Rings)	Oxford/Butner, NC	2 days	6/21-6/22	Package	37	8U-13U
NC GameOn Sports Summer World Series	Oxford/Butner, NC	3 days	7/18-7/20	Package	47	8U-13U
NC Western Zone State 12U	Mooresville, NC	2 days	6/14-6/15	210-445	13	8U-13U
November Blast Charlotte (USSSA)	Charlotte, NC	2 days	11/8-11/9	250-425	12	11U-16U
November to Remember	Charlotte, NC	2 days	11/1-11/2	300-450	77	U8-U18
Rumble at the Rivers - Charlotte	Charlotte, NC	2 days	9/20-9/21	275-425	36	10U-HS
Salem Fair July 4th Softball Tournament	Salem, VA	3 days	7/3-7/5	495		
Spring World Series "NIT"	Concord, NC	2 days	5/11-5/12	185-295		
Sundrop Ultimate Super Regional	Charlotte, NC	2 days	9/13-9/14	350-500	91	U8-U18
Super NIT Warmup - Raleigh Qualifier	Religh, NC	2 days	10/25-10/26	250-425	22	13U-14U
Super Summer Sizzler	Charlotte, NC	2 days	8/16-8/17	350-450	26	U10-U18
Top Gun "Super Regional" & "Showcase Pro-Day"	Spartanburg, SC	2 days	5/2-5/3	275-575		
Top Gun 1 Day Super Saver	Rocky Mount, NC	1 day	9-May	200		
TOP GUN SUMMER WORLD SERIES	Fayetteville, NC	2 days	5/30-5/31	250-350		
USSSA State Championships	Florence, SC	2 days	6/13-6/14	310		
VA State Championships	Madison Heights, VA	2 days	5/9-5/10	250-400		
West VA Fall State (USSSA)	Covington, VA	2 days	10/17-10/18	200		
Winter Mania Bow Net Championships	Duncan, SC	2 days	3/14-3/15	250-400		
Winter State Championship	Charlotte, NC	2 days	11/8-11/9	350-500	69	U9-U18

2. Multi-Purpose Field Tournaments and Events

A Sampling of current and past multi-purpose field tournaments and events in the region. Details on this page break down the type of tournament, locations, number of teams, cost, length, seasonality, and level of play.

Tournament Name	Location	Length	Dates	Price	Teams	Level	In State	In Region	Foreign
2013 Piedmont Shootout	Axton, VA	2 days	11/16-11/17	425-595	60	U9-U19	87%	92%	
2014 adidas Boys Wolf River Classic	Memphis, TN	3 days	10/17-10/19	450-725	179	U11-U18	47%	73%	2%
2014 adidas SoccerElite Fall Championship	Memphis, TN	3 days	9/5-9/7	450-725	82	U11-U17	70%	95%	1
2014 Capital Cup	Hanover, VA	2 days	5/25-5/26	535-575	53				
2014 Charleston Select Shootout - Men	Charleston, SC	3 days	10/10-10/12	540-590	128	U11-U18	96%	98%	2%
2014 Charleston Select Shootout - Women	Charleston, SC	3 days	9/26-9/28	540-590	85	U11-U18	74%	95%	5%
2014 Commonwealth Invitational	Hanover, VA	2 days	11/22-11/23	515-575	42				
2014 Harris Teeter Shootout - 23rd Annual	Charleston, SC	3 days	3/21-3/23	400-500	96	U11-U14	72%	97%	3%
2014 Jefferson Cup Boys Showcase	Richmond, VA	3 days	3/7-3/9	600-1000	401	U11-U18	24%	64%	0%
2014 Kickers Colonial Cup	Chesterfield, VA	2 days	5/24/5/25		62				
2014 Labor Day Region 2000 Cup	Lynchburg, VA	2 days	8/30-8/31	525-625	49				
2014 Loudon Soccer College Showcase	Leesburg, VA	3 days	2/28-3/2	800	36	U15-U19	81%	100%	0%
2014 Southern Soccer Showcase	Winston Salem, NC	3 days	4/4-4/6						
2014 Summer Soccer Starter Tournament	Southern Pines, NC	2 days	5/10-5/11	450-550	38	U10-U14	97%	97%	3%
2014 Texas Pete Twin City Classic	Winston Salem, NC	3 days	8/15-8/17	425-625	153	U10-U18	90%	98%	
2014 Twin City Friendlies	Winston Salem	3 days	1/24-1/26			U12-U16			
2014 Ultimate Cup (Boys Weekend)	Chesterfield/Richmond, VA	2 days	3/1-3/2	575-695	216	U11-U18	80%	92%	0
2014 Ultimate Cup (Girls Weekend)	Chesterfield/Richmond, VA	2 days	2/22-2/23	575-695	206	U11-U18	68%	97%	0%

2. Multi-Purpose Field Tournaments and Events Continued

2015 Interim HealthCare Spring Challenge	Greenville County, SC	2 days	4/25-4/26						
21st Annual 2014Chesapeake Icebreaker Invitational	Chesapeake, VA	2 days	3/1-3/2	550-675	24	U11-U16	100%	100%	0%
adidas Greensboro Clash	Greensboro, NC	3 days	11/17-11/19	575-650		U13-U19			
Aiken Soccer Cup 2014	Aiken, SC	2 days	8/23-8/24		105	U12-U19	69%	100%	
Annandale Premier Cup 2014 - Boys Weekend	Herndon, VA	3 days	3/7-3/9	750-1000	471	U11-U19	18%	80%	3
Annandale Premier Cup 2014 - Girls Spring Showcase	Herndon, VA	3 days	2/28-3/2	750-1000	40	U14-U17	40%	90%	0%
Arlington Spring Invitational	Arlington, VA	10 days	2/28-3/9	650-775	172	U11-U14	76%	100%	0
Beat the Heat	Winston-Salem, NC	2 days	4/25-4/26	450-575					
Carolina Soccerween 2014	Rock Hill, SC	1 day	8-Nov	200-250					
CASL Boys Shootout	Raleigh, NC	2 days	11/16-11/17	745-845	84	U12-U14	37%	55%	3%
CASL Boys Showcase	Raleigh, NC	3 days	12/12-12/14	1395	128	U15-U19	15%	60%	2%
CASL winter blast	Raleigh, NC	2 days	1/31-2/1	375-625					
FCCA Carolina Shootout	Concord, NC	2 days	11/8-11/9	985-1285	92	U12-U19	77%	97%	
GUA Friendlies	Brown's Summit, NC	3 days	1/30-2/1	450-650					
ICRD Crossroads Classic	Statesville, NC	2 days	5/17-5/18	475	61	U12-U15	95%	97%	
King of the Hill	Boone, NC	2 days	5/2-5/3	475					
LNSC Race City Classic	Statesville, NC	2 days	3/7-3/8	400-595					
SRFC Summer Shootout 2014	Smyrna, TN	3 days	8/15-8/17	250-550	36	U11-U13	86%	86%	11%
Tennessee Invitational 2014	Franklin, TN	3 days	5/9-5/11	475-725	149	U11-U17	64%	78%	1%
TFCA Friendlies	Fayetteville, NC	2 days	1/31-2/1	450-650					
Triangle FC Friendlies	Fayetteville, NC	3 days	1/31-2/2	570-670		U16-U19			
Twin City Friendlies	Advance, NC	3 days	1/23-1/25	525-625					
Wrangler McDonald's Soccer Tournament	Greensboro, SC	2 days	5/25-5/26	425-650	121	U12-U18	61%	69%	

3. Court Tournaments and Events

A Sampling of current and past court tournaments and events in the region. Details on this page break down the type of tournament, locations, number of teams, cost, length, seasonality, and level of play.

Tournament Name	Location	Length	Dates	Price	Teams	Level
13th Annual Boone Roundball Classic	Ashe County, NC	3 days	3/13-3/15	\$225	150	U9-U18
14th Annual Fluvanna Invitational	Palmyre, VA	3 days	6/5-6/7	\$250		
2015 Marion Roundball Classic	Marion, VA	3 days	2/20-2/22	\$150		
3rd Annual Hoops For the Cure	Raleigh/Durham, NC	3 days	3/27-3/29	\$225	56	2nd-11th, D1/D2/D3
8th Annual King's Dominion Invitational	Raleigh/Durham, NC	3 days	5/29-5/31	\$225	100+	2nd-11th, D1/D2/D3
Big Shots Charlotte	Charlotte, NC	2 days	7/18-7/19	\$600	24	
Big Shots Charlotte Memorial Weekend	Charlotte, NC	2 days	5/16-5/17	\$425		
Big Time Hoops Carolina College Showcase	Charlotte, NC	2 days	6/20-6/21	\$375	48	U8-U18
Big Time Hoops Carolina College Showcase	Charlotte, NC	2 days	6/20-6/21	\$375	50+	3rd-12th, A/B/C
Carolina Courts Kick Off Tournament	Raleigh, NC	2 days	5/9-5/10	225		
Center Stage AAU Invitational	Orangeburg, SC	3 days	4/10-4/12	\$225	80+	AAU U11-U17
Crosstown Throwdown Volleyball	Columbia, SC	1 day	24-Jan	\$200		
Deep South Classic	Raleigh, NC	3 days	4/24-4/26			
Dixie Classic	Spartanburg, SC	2 days	3/21-3/22	\$375		
East Surry Challenge	Pilot Mountain, NC	1 days	10-Jan	\$150		
Fab 50 End of the trail Showcase	Greensboro, NC	3 days	8/15-8/17	\$250	50	U9-U17
Hoops City March Madness	Raleigh/Durham, NC	3 days	3/6-3/8	\$225	52	2nd-11th, D1/D2/D3
North Carolina College Showcase	Indian Trails, NC	2 days	6/20-6/21	\$300	48	U8-U18
NTBA Carolina Courts Shooting for the Stars	Charlotte, NC	3 days	4/24-4/26	\$175	100+	U9-U18, A/B/C

3. Court Tournaments and Events Continued

NTBA Taking Youth Seriously Invitational	Petersburg, VA	3 days	3/27-3/29	\$150		
Quest for Excellence	Greensboro, NC	2 days	12/27-12/28	\$500		
Rawlings Invitational	Raleigh/Durham, NC	3 days	4/24-4/26	\$225	49	2nd-11th, D1/D2/D3
SC KINGS - MLK I Have A Dream Tournament	Columbia, SC	3 days	1/16-1/18	\$200	48	3rd-8th
SCMB Royal Rumble	Raleigh, NC	3 days	1/30-2/1	\$150		
Shamrock Festival	Roanoke, VA	2 days	3/14-3/15			
Sharp Shooters Spring Tip-Off	Charlotte, NC	2 days	3/29-3/30	\$150	60+	3rd-12th
Southern Classic Power	Upstate, SC	2 days	3/7-3/8	\$375		
Spartans Azalea Tournament	Wilmington, NC	3 days	4/10-4/12	\$225		
Spectrum Winter Superjam	Roanoke, VA	2 days	1/10-1/11	\$190		
Sweet Elite Showdown	Spartanburg, SC	3 days	3/27-3/29	\$225		
The Battle at the Brock	Ashland, VA	2 days	6/13-6/14	\$265		
The Rock Classic	Raleigh/Durham, NC	3 days	4/10-4/12	\$225	59	2nd-11th, D1/D2/D3
Tobacco Road Summer Showdown Girls	Greensboro, NC	4 days	7/5-7/8	\$350		
Upward Stars Battle at the star tournament	Spartanburg, SC	2 days	4/10-4/11	\$225		
USA Volleyball Palmetto Regional State Championships	Charlotte, NC	3 days	3/27-3/29	\$325	150	U12-U18
USSSA Boys State Championship	Greensboro, NC	3 days	6/24-6/26	\$350		
USSSA Girls State Championship	Greensboro, NC	2 days	5/31-6/1	\$300		
VBC Invitational Tournament	Stuart's Draft, VA	2 days	1/24-1/25	\$250		
Winter Solstice Volleyball	Columbia, SC	1 day	17-Jan	\$200		U14-U18
YSAL Nationals	Durham, Triangle Area, NC	3 days	6/26-6/28	\$200	70+	2nd-12th, A/B/C
2015 RAPTORS Classic	Kernersville, NC	3 days	12/14-12/15	\$200	176	4th-9th

DEMOGRAPHICS

Demographic Snapshot Comparison Report

	Davidson	Davie	Forsyth	Guilford	Montgomery	Randolph	Rowan	Stanly
Population: 2014A								
Total Population	163,189	41,623	363,713	509,056	27,629	143,248	138,523	60,913
Female Population	51.0%	51.4%	52.6%	52.4%	51.6%	50.7%	50.7%	50.2%
Male Population	49.0%	48.6%	47.5%	47.6%	48.4%	49.3%	49.3%	49.8%
Population Density	288	156	881	774	55	181	264	151
Population Median Age	41.2	43.5	37.5	36.7	40.8	40.2	39.9	41.2
Total Employees	40,626	10,711	177,775	272,381	9,938	44,156	41,582	20,218
Total Establishments*	4,817	1,427	13,137	21,827	911	4,647	4,506	2,187
Population Growth 2000-2010	10.6%	18.3%	14.6%	16.0%	3.6%	8.7%	6.2%	4.3%
Population Growth 2014A-2019	4.0%	6.1%	4.9%	5.6%	2.3%	3.3%	2.7%	2.3%
Income: 2014A								
Average Household Income	\$56,009	\$72,403	\$65,761	\$66,539	\$48,456	\$54,111	\$54,638	\$54,413
Median Household Income	\$43,332	\$50,089	\$43,819	\$44,611	\$32,516	\$41,548	\$41,666	\$40,466
Per Capita Income	\$22,297	\$28,660	\$26,916	\$27,247	\$18,897	\$21,267	\$21,396	\$21,635
Avg Income Growth 2000-2010	20.2%	36.5%	21.0%	16.0%	9.9%	12.8%	21.4%	22.4%
Avg Income Growth 2014A-2019	12.6%	12.4%	12.8%	13.4%	12.3%	13.3%	14.9%	12.2%
Households: 2014A								
Households	64,587	16,414	146,999	205,615	10,499	56,009	53,274	23,765
Average Household Size	2.50	2.51	2.41	2.40	2.53	2.54	2.52	2.48
Hhld Growth 2000-2010	10.9%	18.1%	14.0%	16.6%	7.1%	9.3%	6.4%	6.1%
Hhld Growth 2014A-2019	4.7%	6.5%	5.7%	6.5%	3.4%	3.9%	3.2%	3.0%
Housing Units: 2014A								
Occupied Units	64,587	16,414	146,999	205,615	10,499	56,009	53,274	23,765
% Occupied Units	88.6%	89.6%	91.8%	92.3%	65.2%	90.9%	88.1%	86.8%
% Vacant Housing Units	11.4%	10.4%	8.2%	7.7%	34.8%	9.1%	11.9%	13.2%
Owner Occ Housing Growth 2000-2010	8.5%	15.0%	10.9%	13.0%	2.4%	4.2%	0.7%	1.1%
Owner Occ Housing Growth 2000-2019	13.9%	23.0%	22.3%	25.2%	4.6%	10.5%	3.2%	4.2%
Owner Occ Housing Growth 2014A-2019	4.7%	6.5%	6.1%	6.4%	3.2%	3.8%	2.9%	2.8%
Occ Housing Growth 2000-2010	10.9%	18.1%	14.0%	16.6%	7.1%	9.3%	6.4%	6.1%
Occ Housing Growth 2010-2019	4.8%	7.6%	10.1%	11.4%	3.0%	5.1%	3.5%	3.7%
Occ Housing Growth 2014A-2019	4.7%	6.5%	5.7%	6.5%	3.4%	3.9%	3.2%	3.0%
Race and Ethnicity: 2014A								
% American Indian or Alaska Native Population	0.5%	0.4%	0.4%	0.5%	0.5%	0.7%	0.4%	0.4%
% Asian Population	1.3%	0.7%	2.1%	4.2%	1.5%	1.0%	1.1%	1.9%
% Black Population	8.9%	6.4%	25.8%	33.0%	18.7%	6.0%	16.0%	11.1%
% Hawaiian or Pacific Islander Population	0.0%	0.0%	0.1%	0.1%	0.0%	0.0%	0.0%	0.1%
% Multirace Population	1.6%	1.9%	2.4%	2.5%	1.6%	1.8%	1.8%	1.3%
% Other Race Population	3.6%	3.6%	7.4%	3.7%	9.1%	5.5%	4.4%	2.2%
% White Population	84.0%	87.1%	61.9%	56.1%	68.7%	85.0%	76.3%	83.2%
% Hispanic Population	6.4%	6.2%	12.5%	7.5%	14.8%	10.8%	7.9%	3.8%

	Davidson	Davie	Forsyth	Guilford	Montgomery	Randolph	Rowan	Stanly
% Non Hispanic Population	93.6%	93.8%	87.5%	92.5%	85.2%	89.2%	92.1%	96.2%

SFA Demographic Report 2014

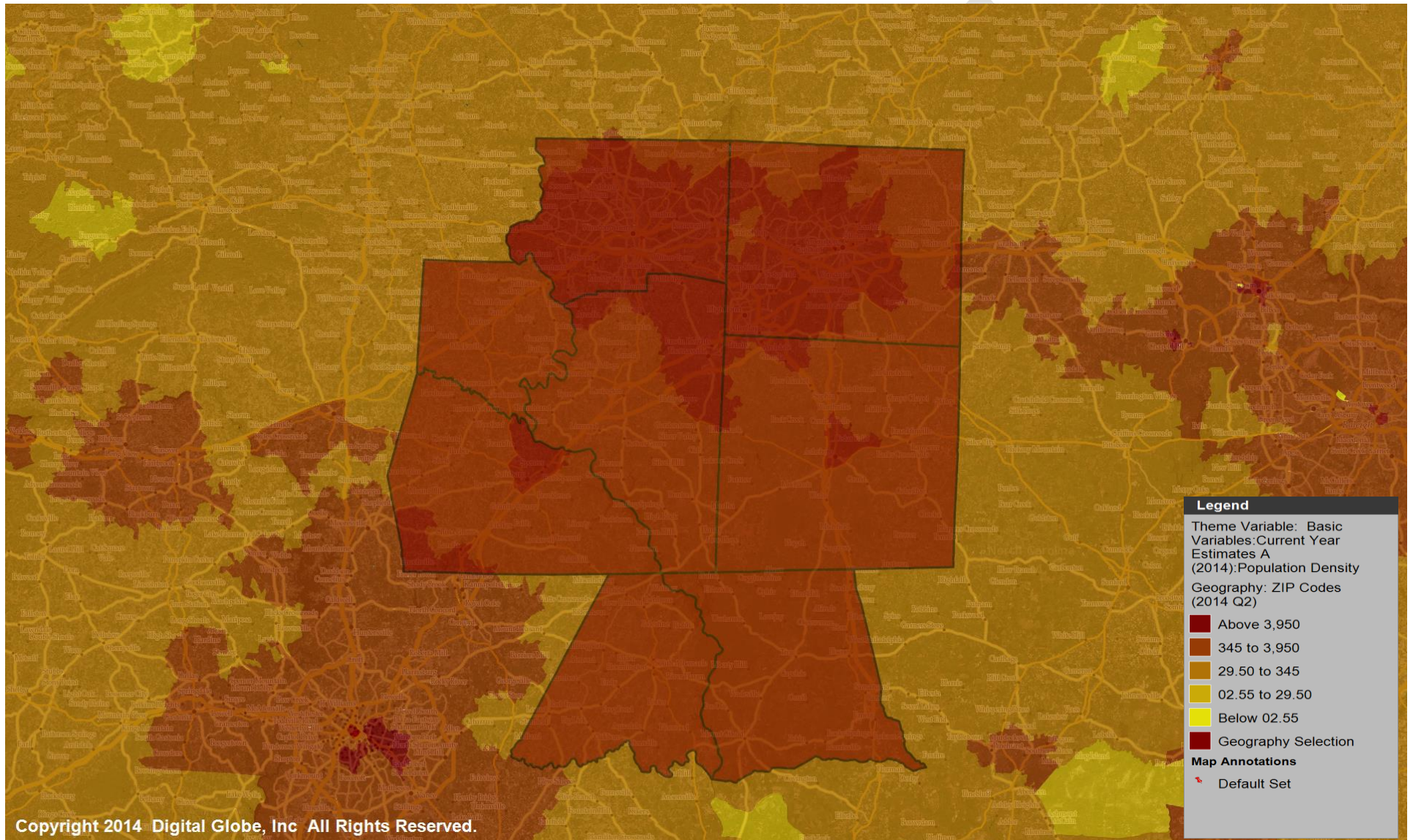
	Davidson	Davie	Forsyth	Guilford	Montgomery	Randolph	Rowan	Stanly
Basic Variables 2014								
% Female Population	50.98%	51.38%	52.55%	52.39%	51.57%	50.66%	50.68%	50.17%
% Male Population	49.02%	48.62%	47.45%	47.61%	48.43%	49.34%	49.32%	49.83%
5 Year Projected Population Growth	4.02%	6.09%	4.90%	5.62%	2.34%	3.25%	2.68%	2.25%
Basic Variables 2014 By Percent:Age:Total (Pop)								
% Age 0-4	5.81%	5.40%	6.66%	6.17%	6.12%	6.13%	6.06%	5.85%
% Age 5-9	6.48%	6.15%	6.76%	6.39%	6.58%	6.66%	6.53%	6.11%
% Age 10-14	6.95%	7.02%	6.71%	6.57%	7.02%	7.21%	6.59%	6.34%
% Age 25-29	5.30%	4.37%	6.45%	6.81%	5.26%	5.35%	5.80%	5.68%
% Age 30-34	5.78%	5.06%	6.44%	6.56%	5.86%	5.76%	6.11%	5.57%
% Age 35-39	6.20%	5.96%	6.19%	6.31%	5.97%	6.35%	6.00%	5.84%
% Age 40-44	7.63%	7.28%	6.84%	7.09%	6.42%	7.49%	6.85%	7.00%
% Age 45-49	7.73%	7.72%	7.01%	7.01%	6.56%	7.52%	7.21%	7.45%
% Age 50-54	7.75%	7.88%	7.22%	6.97%	7.11%	7.43%	7.48%	7.27%
% Age 55-59	6.90%	7.55%	6.55%	6.32%	7.17%	6.79%	6.92%	6.97%
% Age 65+	15.36%	17.72%	13.45%	12.83%	16.70%	14.92%	15.20%	16.30%
Basic Variables 2014 By Percent:Educational Attainment:By Sex (Pop 25+):Total								
% Associate's degree	8.74%	8.86%	7.40%	7.21%	8.90%	9.22%	8.93%	9.56%
% Bachelor's degree	12.89%	16.32%	20.70%	21.96%	9.88%	9.90%	11.30%	11.22%
% Doctorate degree	0.30%	1.46%	1.34%	1.36%	1.02%	0.20%	0.39%	0.39%
% High school graduate, GED, or alternative	34.36%	31.17%	27.87%	26.59%	29.43%	34.96%	33.29%	33.27%
Basic Variables 2014 By Percent:Income:Household								
% Household Income < \$10,000	8.06%	6.32%	8.36%	8.42%	12.83%	8.60%	8.56%	8.39%
% Household Income \$10,000-\$14,999	7.09%	4.61%	6.51%	6.08%	11.04%	6.89%	7.92%	7.78%
% Household Income \$15,000-\$19,999	6.29%	5.29%	6.61%	6.09%	8.85%	7.03%	6.76%	6.99%
% Household Income \$20,000-\$24,999	7.06%	5.81%	6.60%	6.65%	8.32%	6.65%	6.23%	7.80%
% Household Income \$25,000-\$29,999	6.35%	5.74%	6.46%	6.25%	6.00%	6.83%	6.31%	6.05%
% Household Income \$30,000-\$34,999	6.37%	6.18%	6.01%	6.04%	5.84%	6.58%	6.34%	6.22%
% Household Income \$35,000-\$39,999	5.33%	5.23%	5.46%	5.40%	5.53%	5.72%	6.16%	6.28%
% Household Income \$40,000-\$44,999	5.16%	5.52%	5.13%	5.45%	6.49%	5.41%	4.99%	4.80%
% Household Income \$45,000-\$49,999	4.99%	5.22%	4.17%	4.04%	4.33%	5.41%	5.59%	4.88%
% Household Income \$50,000-\$59,999	9.31%	7.46%	7.85%	7.81%	7.63%	9.08%	8.66%	8.18%
% Household Income \$60,000-\$74,999	11.47%	10.56%	9.61%	9.54%	7.08%	10.83%	10.37%	11.23%
% Household Income \$75,000-\$99,999	11.40%	13.18%	10.53%	10.94%	6.75%	11.06%	11.41%	10.89%
% Household Income \$100,000-\$124,999	5.38%	6.86%	6.64%	6.80%	3.81%	4.76%	5.32%	5.10%
% Household Income \$125,000-\$149,999	2.36%	4.23%	3.45%	3.62%	2.45%	2.34%	2.20%	2.60%
% Household Income \$150,000-\$199,999	1.78%	3.80%	3.09%	3.44%	1.06%	1.25%	1.68%	1.14%
Basic Variables 2014 By Percent:Marital Status (Pop 15 Plus):Total								
% Divorced	12.11%	9.30%	10.21%	10.90%	10.01%	11.83%	12.13%	11.76%

	Davidson	Davie	Forsyth	Guilford	Montgomery	Randolph	Rowan	Stanly
% Never Married	23.38%	22.10%	33.23%	34.89%	25.57%	23.61%	27.41%	26.35%
% Now Married	57.98%	61.44%	50.61%	48.70%	55.40%	57.60%	53.16%	54.78%
% Now Married, Spouse Absent: Separated	3.21%	2.27%	2.84%	2.90%	3.52%	3.33%	3.15%	1.89%
% Widowed	6.53%	7.16%	5.95%	5.51%	9.02%	6.96%	7.30%	7.11%
Basic Variables 2014 By Percent:Race and Ethnicity:Hispanic/Latino								
% Total Hispanic/Latino Population	6.44%	6.23%	12.48%	7.49%	14.76%	10.79%	7.94%	3.81%
Basic Variables 2014 By Percent:Race and Ethnicity:Not Hispanic/Latino								
% Total Non Hispanic/Latino Population	93.56%	93.77%	87.52%	92.51%	85.24%	89.21%	92.06%	96.19%
Basic Variables 2014 By Percent:Race and Ethnicity:Population:Total								
% American Indian & Alaska Native	0.50%	0.37%	0.42%	0.53%	0.47%	0.68%	0.36%	0.38%
% Asian	1.31%	0.66%	2.05%	4.20%	1.48%	1.02%	1.10%	1.86%
% Black/African American	8.92%	6.41%	25.80%	32.97%	18.72%	5.95%	16.03%	11.09%
% Native Hawaiian / Other Pacific Islander	0.02%	0.01%	0.07%	0.05%	0.01%	0.03%	0.04%	0.06%
% Some other race	3.61%	3.59%	7.41%	3.74%	9.08%	5.48%	4.43%	2.19%
% Two or more races	1.61%	1.87%	2.35%	2.45%	1.57%	1.83%	1.75%	1.26%
% White	84.02%	87.10%	61.90%	56.05%	68.68%	85.00%	76.29%	83.16%
Basic Variables 2014								
Population Density	287.83	156.04	880.89	774.02	55.06	181.40	264.42	150.67
Total Households	64,587	16,414	146,999	205,615	10,499	56,009	53,274	23,765
Total Population	163,189	41,623	363,713	509,056	27,629	143,248	138,523	60,913
Basic Variables 2014 Age:Total (Pop)								
Age 0-4	9,477	2,248	24,220	31,422	1,692	8,780	8,395	3,561
Age 5-9	10,573	2,558	24,580	32,536	1,817	9,547	9,042	3,720
Age 10-14	11,346	2,920	24,417	33,465	1,940	10,327	9,131	3,860
Age 15-19	10,314	2,682	25,527	37,353	1,798	9,141	9,066	3,967
Age 20-24	8,847	1,925	25,235	41,030	1,581	8,408	9,028	4,001
Age 25-29	8,644	1,818	23,457	34,690	1,452	7,659	8,041	3,459
Age 30-34	9,431	2,108	23,436	33,380	1,618	8,252	8,466	3,391
Age 35-39	10,117	2,480	22,524	32,105	1,649	9,098	8,312	3,560
Age 40-44	12,458	3,030	24,890	36,106	1,775	10,728	9,483	4,266
Age 45-49	12,614	3,213	25,508	35,686	1,813	10,774	9,986	4,537
Age 50-54	12,643	3,279	26,266	35,481	1,965	10,646	10,368	4,426
Age 55-59	11,254	3,144	23,836	32,170	1,981	9,725	9,592	4,245
Age 60-64	10,413	2,843	20,885	28,305	1,933	8,795	8,555	3,993
Age 65+	25,058	7,375	48,932	65,327	4,615	21,368	21,058	9,927
Median Age, Total	41.20	43.48	37.46	36.67	40.77	40.20	39.87	41.16
Basic Variables 2014 Age:Total (Pop):Detail								
Total Population aged < 20	41,710	10,408	98,744	134,776	7,247	37,795	35,634	15,108
Basic Variables 2014 By Percent:Age:Total (Pop)								
% Age 15-19	6.32%	6.44%	7.02%	7.34%	6.51%	6.38%	6.54%	6.51%
% Age 20-24	5.42%	4.62%	6.94%	8.06%	5.72%	5.87%	6.52%	6.57%
% Age 60-64	6.38%	6.83%	5.74%	5.56%	7.00%	6.14%	6.18%	6.56%
Basic Variables 2014 By Percent:Educational Attainment:By Sex (Pop 25+):Total								

	Davidson	Davie	Forsyth	Guilford	Montgomery	Randolph	Rowan	Stanly
% 9th to 12th grade, no diploma	13.47%	9.96%	7.96%	7.55%	15.15%	13.00%	12.87%	13.40%
% College, no degree	20.16%	20.34%	20.80%	21.40%	21.75%	21.02%	22.43%	22.03%
% Graduate or Professional School degree	4.28%	9.58%	10.43%	10.66%	5.26%	3.68%	4.86%	4.83%
Basic Variables 2014 By Percent:Income:Household								
% Household Income \$200,000+	1.60%	3.98%	3.52%	3.42%	2.00%	1.55%	1.50%	1.67%
Basic Variables 2014 Income:Household								
Average (Mean) Household Income	\$56,009	\$72,403	\$65,761	\$66,539	\$48,456	\$54,111	\$54,638	\$54,413
Household Income < \$10,000	5,203	1,037	12,287	17,322	1,347	4,817	4,562	1,994
Household Income \$10,000-\$14,999	4,582	757	9,568	12,507	1,159	3,857	4,219	1,849
Household Income \$15,000-\$19,999	4,061	869	9,710	12,528	929	3,938	3,599	1,662
Household Income \$20,000-\$24,999	4,558	953	9,704	13,666	873	3,727	3,320	1,853
Household Income \$25,000-\$29,999	4,099	942	9,495	12,845	630	3,827	3,364	1,437
Household Income \$30,000-\$34,999	4,117	1,015	8,841	12,429	613	3,685	3,377	1,479
Household Income \$35,000-\$39,999	3,440	859	8,028	11,108	581	3,204	3,281	1,492
Household Income \$40,000-\$44,999	3,334	906	7,548	11,197	681	3,029	2,661	1,141
Household Income \$45,000-\$49,999	3,226	856	6,129	8,315	455	3,031	2,979	1,160
Household Income \$50,000-\$59,999	6,014	1,224	11,538	16,055	801	5,085	4,612	1,943
Household Income \$60,000-\$74,999	7,408	1,734	14,122	19,610	743	6,068	5,524	2,668
Household Income \$75,000-\$99,999	7,365	2,164	15,485	22,501	709	6,195	6,077	2,588
Household Income \$100,000-\$124,999	3,474	1,126	9,760	13,977	400	2,666	2,833	1,212
Household Income \$125,000-\$149,999	1,523	695	5,069	7,444	257	1,310	1,174	618
Household Income \$150,000-\$199,999	1,151	623	4,541	7,077	111	701	893	272
Household Income \$200,000+	1,032	654	5,174	7,034	210	869	799	397
Median Household Income	\$43,332	\$50,089	\$43,819	\$44,611	\$32,516	\$41,548	\$41,666	\$40,466
Basic Variables 2014 Race and Ethnicity:Hispanic/Latino								
Total Hispanic/Latino Population	10,509	2,594	45,391	38,147	4,077	15,455	10,993	2,318
Basic Variables 2014 Race and Ethnicity:Not Hispanic/Latino								
Total Not Hispanic/Latino Population	152,680	39,029	318,322	470,909	23,552	127,793	127,530	58,595
Basic Variables 2014 Race and Ethnicity:Population								
American Indian & Alaska Native	823	153	1,543	2,719	129	977	499	230
Asian	2,142	273	7,442	21,379	408	1,460	1,525	1,134
Black/African American	14,562	2,666	93,852	167,845	5,171	8,528	22,210	6,753
Native Hawaiian / Other Pacific Islander	27	6	255	258	3	38	56	39
Some other race	5,897	1,493	26,935	19,064	2,508	7,853	6,130	1,333
Two or More races	2,633	780	8,547	12,484	435	2,626	2,419	770
White	137,105	36,252	225,139	285,307	18,975	121,766	105,684	50,654
Business Summary 2014 Employees: Major SIC Division								
Total Employees	40,626	10,711	177,775	272,381	9,938	44,156	41,582	20,218
Business Summary 2014 Establishments: Major SIC Division								
Total Establishments	4,817	1,427	13,137	21,827	911	4,647	4,506	2,187
Consumer Expenditure 2014 Average Expenditure								
Average Alcoholic beverages	\$348.11	\$371.97	\$350.61	\$349.73	\$308.34	\$344.60	\$340.33	\$342.34
Average Entertainment	\$2,378.33	\$2,545.26	\$2,329.47	\$2,322.24	\$2,183.76	\$2,344.90	\$2,366.37	\$2,383.34
Average Food	\$6,683.99	\$6,989.43	\$6,535.33	\$6,526.30	\$6,338.56	\$6,634.38	\$6,719.05	\$6,712.27
Consumer Expenditure 2014 Average Expenditure:Alcoholic								

	Davidson	Davie	Forsyth	Guilford	Montgomery	Randolph	Rowan	Stanly
beverages								
Average Alcoholic beverages at home	\$195.40	\$208.16	\$195.11	\$194.14	\$180.40	\$193.99	\$193.67	\$194.98
Average Alcoholic beverages away from home	\$152.71	\$163.81	\$155.49	\$155.60	\$127.94	\$150.60	\$146.66	\$147.36
Consumer Expenditure 2014 Average Expenditure:Entertainment								
Average Fees and admissions	\$377.47	\$408.72	\$376.23	\$375.08	\$328.50	\$368.40	\$369.66	\$370.07
Consumer Expenditure 2014 Average Expenditure:Entertainment:Other entertainment supplies, equipment, and services								
Average Sports, recreation and exercise equipment	\$118.40	\$135.57	\$116.42	\$116.64	\$96.39	\$112.60	\$119.00	\$121.68
Consumer Expenditure 2014 Average Expenditure:Food								
Average Food at home	\$4,364.15	\$4,564.03	\$4,224.69	\$4,206.70	\$4,245.61	\$4,336.25	\$4,431.90	\$4,424.90
Average Food away from home	\$2,319.84	\$2,425.40	\$2,310.64	\$2,319.60	\$2,092.95	\$2,298.13	\$2,287.15	\$2,287.36
Occupation and Employment 2014 By Percent:Labor Force (Pop 16+):Total								
% Civilian, Employed	91.02%	92.41%	91.91%	91.54%	90.63%	91.39%	91.21%	91.73%
% Civilian, Unemployed	8.92%	7.59%	7.98%	8.33%	9.37%	8.61%	8.66%	8.27%
% Not in Labor Force	38.06%	38.18%	37.10%	35.01%	49.25%	32.80%	35.34%	38.45%
Occupation and Employment 2014 Labor Force (Pop 16+):Total								
Civilian, Employed	73,055	19,039	165,201	240,994	10,030	69,184	64,920	27,678
Civilian, Unemployed	7,162	1,563	14,337	21,933	1,037	6,515	6,161	2,494

Population Density: Zip Code (Davidson, Davie, Forsyth, Guilford, Montgomery, Randolph, Rowan, Stanly)



Median Household Income: Zip Codes (Davidson, Davie, Forsyth, Guilford, Montgomery, Randolph, Rowan, Stanly)

