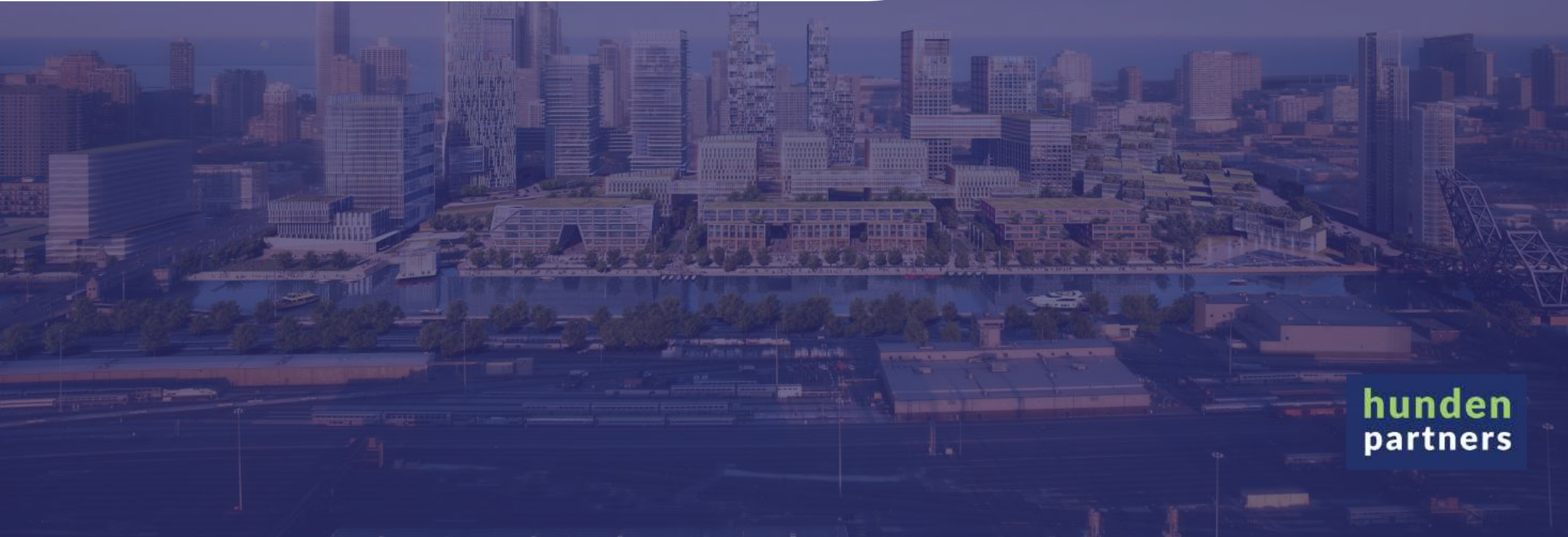


State of the Industry: 2023

ALSD Conference

July 10, 2023



hunden
partners

Back Home in Indiana!



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- 02 Updated Venue Database and Statistics
- 03 Recent Renovations & New Builds
- 04 Team Relocations & Expansions
- 05 Host City Analysis



1

Introduction

Welcome to Design and Build

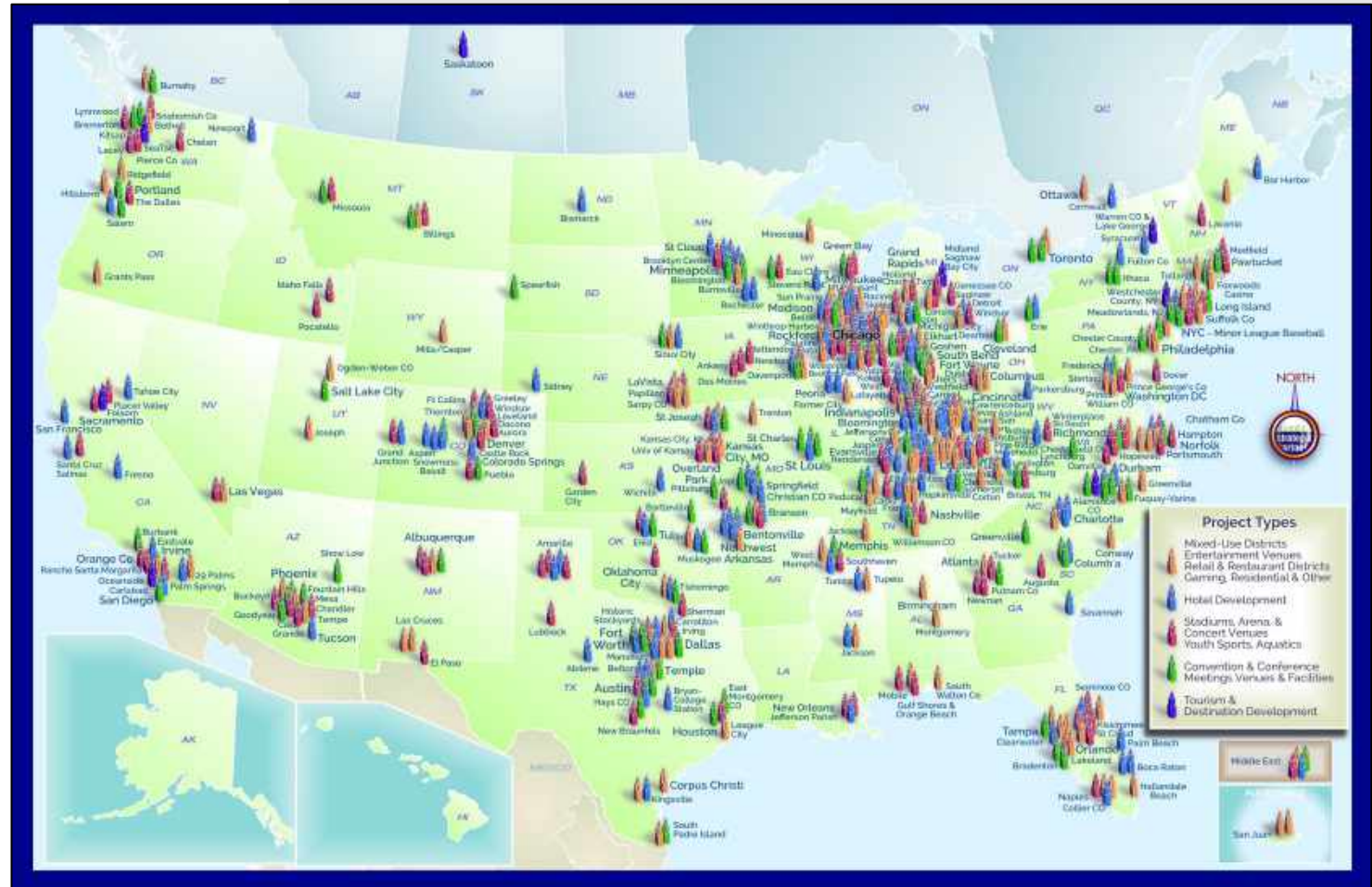
- About **\$4.5 billion** in Major League Sports Projects under construction
- There were a moderate level of deliveries in 2022, which totaled approximately **~\$800 million**. In 2021, total deliveries were **~\$3.1 billion**.
- **Today :**
 - Up-to-Date Database Statistics & Trends
 - New Builds/Major Renovation Profiles
 - League expansions & team relocations
 - **NEW!** Host City Analysis



What Does HP Do?

Conduct market, financial feasibility & impact studies on:

- **Stadiums/Arenas**
- **Entertainment Districts**
- **Hotels, Convention Centers**
- **Mixed-Use Districts**

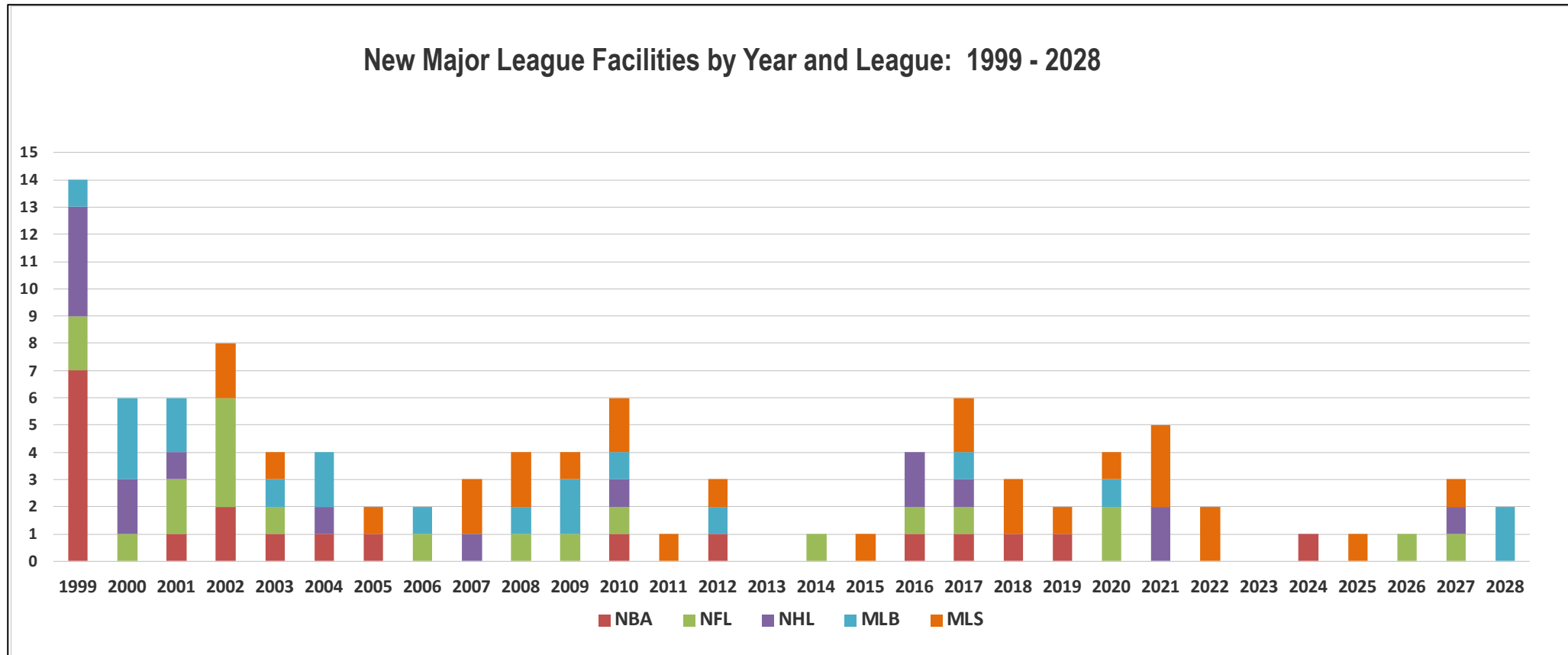


A background image of the Chicago skyline, featuring several tall skyscrapers and a large Ferris wheel on the right side. The image is overlaid with a semi-transparent blue filter. On the left side, there is a green rounded rectangle containing the number 2.

2

Updated Venue Database and Statistics

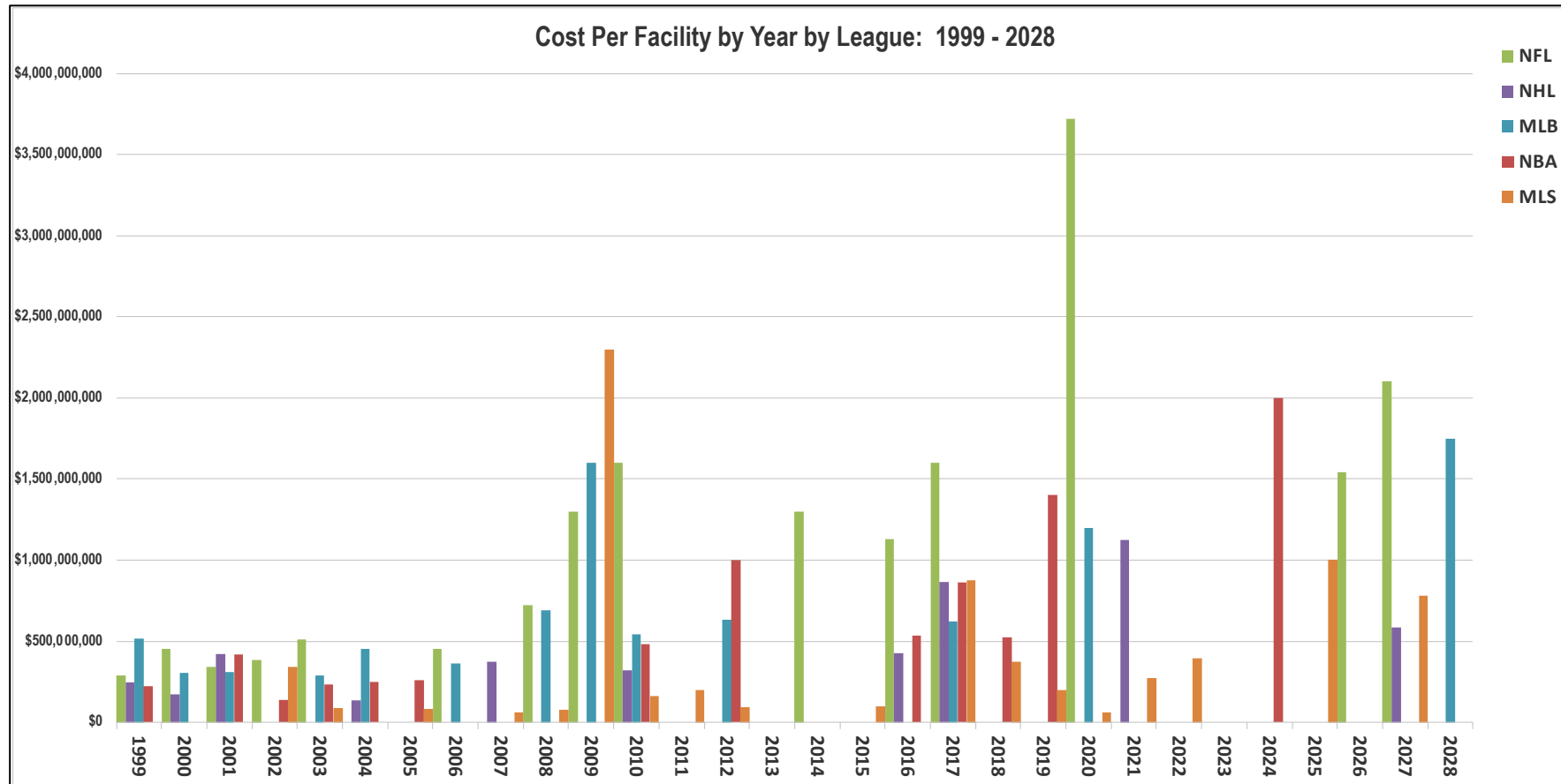
New Major League Facilities by Year



- Owners are deciding on renovation **VS** new development

- Total cost of major renovations are reaching all-time highs

Cost per Venue by Year



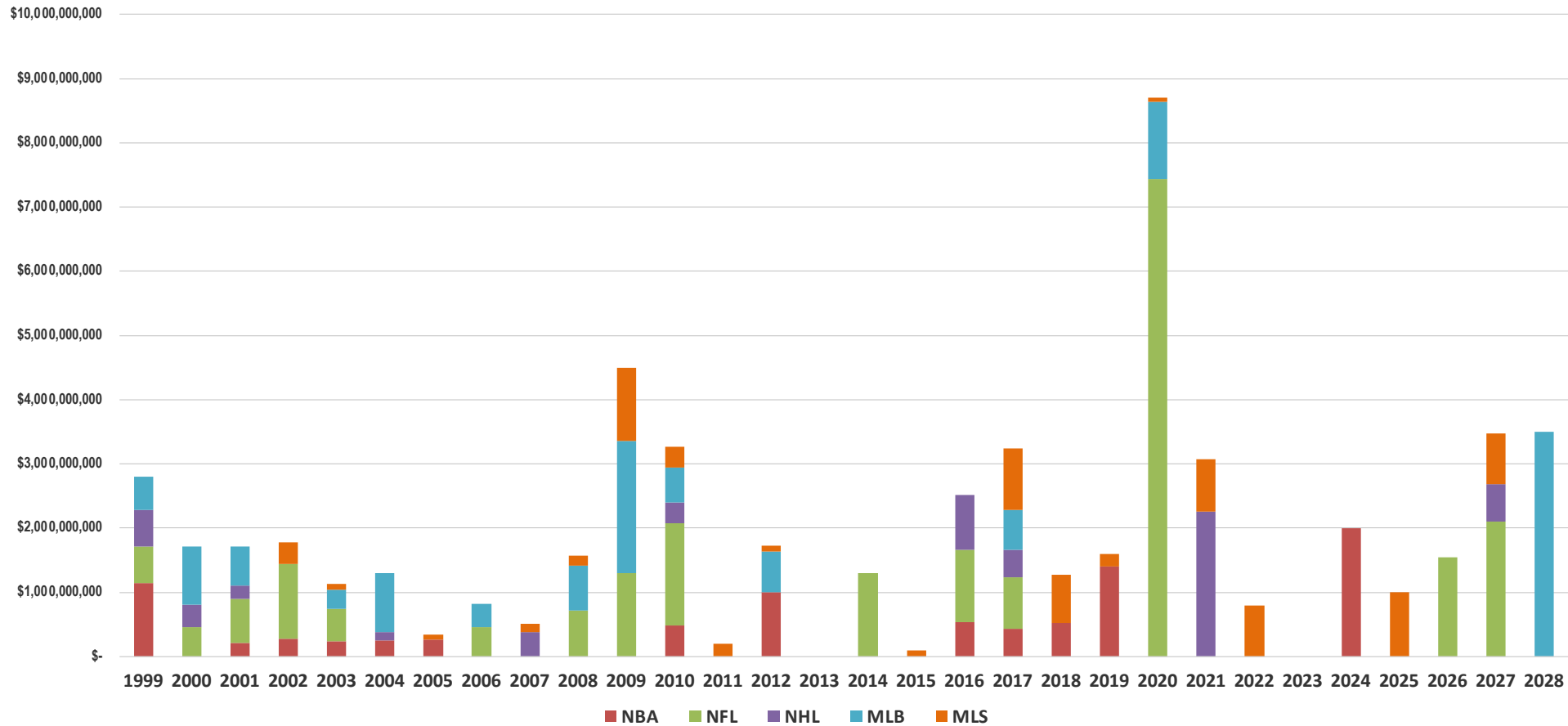
Average cost per new venue by league is **increasing.**

- **NFL: \$2.8B**
- **NBA: \$1.3B**
- **MLB: \$1.6B**
- **NHL: \$946M**
- **MLS: \$643M**

NBA and **MLB** witnessed the most significant gains

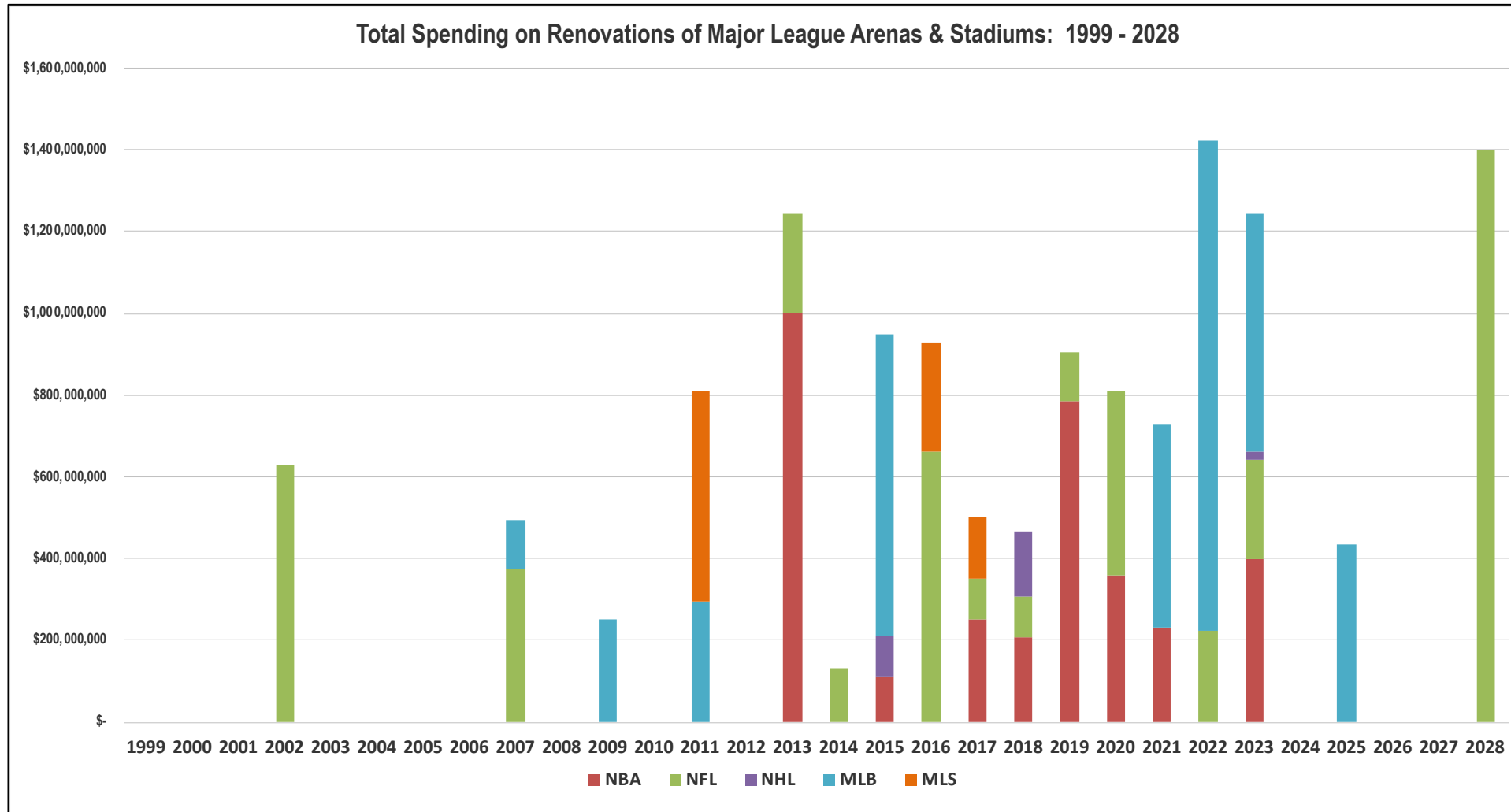
Total Spending on New Major League Facilities

Total Spending on Major League Arenas & Stadiums: 1999 - 2028



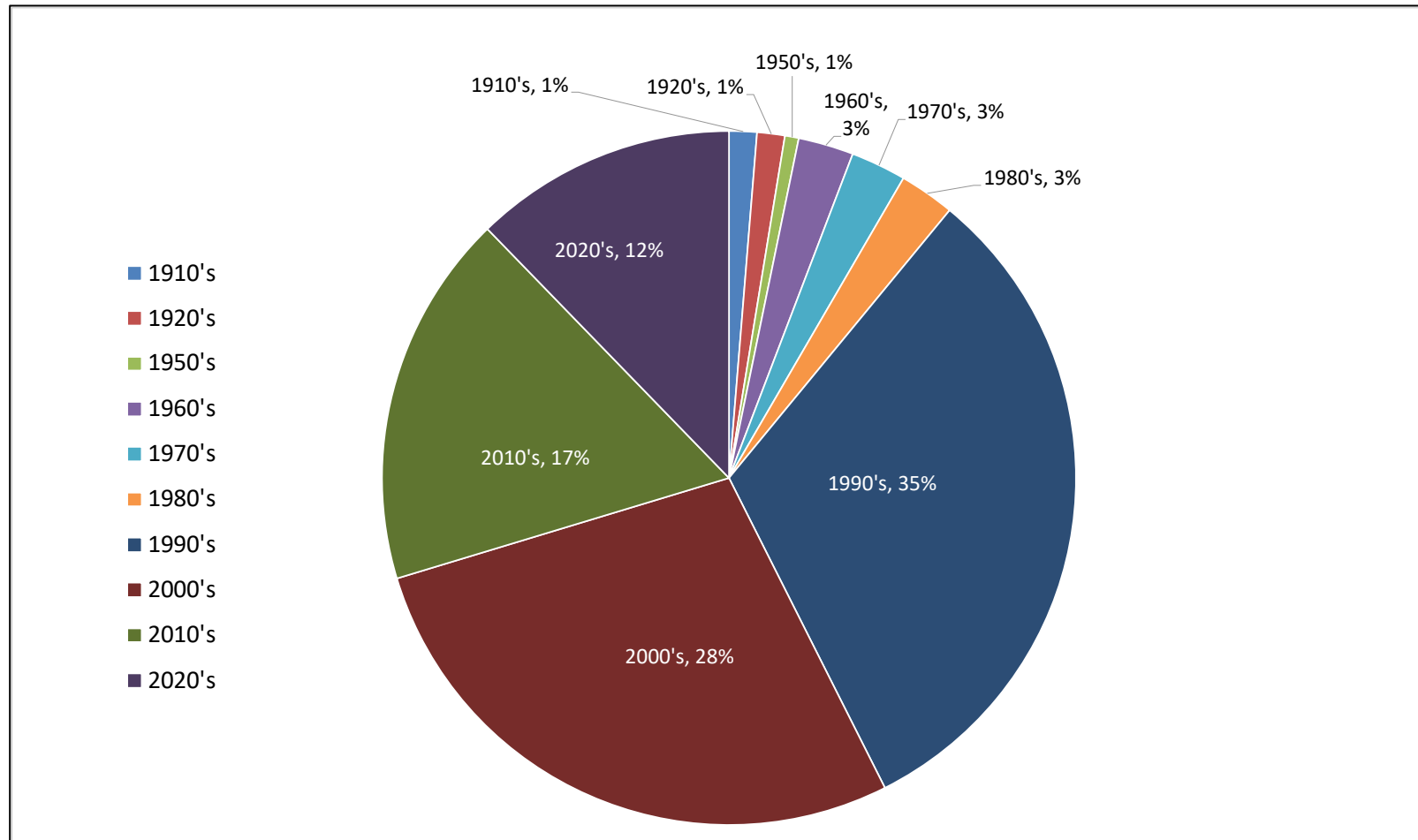
Average annual spend over the last 25 years on new venues is roughly **\$1.9 billion**, increasing despite fewer venues.

Total Spending on Renovations of Major League Facilities



- **\$1.2B in completed renovations in 2023**
- **Many arenas of the NBA/NHL were renovated in the 2010's decade.**
- **The early 2020's decade saw many MLB major renovations**
- **There are two major renovations planned, including Progressive Field in Cleveland in 2025 and TIAA Bank Field in Jacksonville in 2028**

Major League Facilities Built by Decade



- 19+ facilities completed or underway in the 2020's.
- HP projects **21** venues built in 2020 decade, below that delivered in the 2010's

| MLS: Naming Rights Deals

Old
Name

Centene
Stadium



New
Name

CITYPARK

NBA: Naming Rights Deals

Old
Name

FTX Arena



**MIAMI
HEAT**

New
Name

Kaseya Center

Vivant
Arena



Delta Center

| MLB: Naming Rights Deals

Old
Name

RingCentral
Coliseum



New
Name

Oakland-Alameda
County Coliseum

NFL: Naming Rights Deals

Old
Name

**TIAA Bank
Field**



**Paul Brown
Stadium**



**FirstEnergy
Stadium**



New
Name

EverBank Field

Paycor Stadium

**Cleveland Browns
Stadium**



3

Recent Renovations and New Builds

Five Major Leagues (2022 - 2026)

MLS

New Builds

2022-2026

MLS: Recent Renovations and New Builds

2022

- Nashville SC began play in new GEODIS Park
- Charlotte FC kicked off in newly renovated Bank of America Stadium

2023

- Expansion team St. Louis City SC will begin play in CITYPARK Stadium
- Renovations on Gillette Stadium in Foxborough set to be completed

2025

- Miami Freedom Park scheduled to open

2027

- New York City FC new, soccer-specific stadium to open for 2027 MLS season



GEODIS Park

Nashville, Tennessee

- **MLS Franchise: Nashville SC**
- **Reported Cost: \$335 million**
- **Opening Year/Season: 2022-2023**



CITYPARK Stadium

St. Louis, Missouri

- **MLS Franchise: St. Louis City SC**
- **Reported Cost: \$458 million**
- **Opening Year/Season: 2022-2023**



Miami Freedom Park

Miami, Florida

- 
- An aerial architectural rendering of Miami Freedom Park at dusk. The central feature is a large, modern stadium with a white, undulating roof and a vibrant, multi-colored interior. To the right of the stadium is a cluster of modern, multi-story buildings with glass and concrete facades. The park is surrounded by green spaces, including soccer fields and walking paths. In the background, the dense urban landscape of Miami is visible under a colorful sunset sky.
- **MLS Franchise: Inter Miami CF**
 - **Reported Cost: \$1 billion (includes district)**
 - **Opening Year/Season: 2025-2026**

New York City FC

Queens, NYC

- 
- NYC FC announced plans of NYC's first ever soccer specific stadium
 - Set to deliver the largest 100% affordable housing development in 40 years
 - Reported Cost: \$780 million
 - Opening Year/Season: 2027-2028

MLS Venues Without Major Renovations

Longest Time Without a Major Renovation (MLS)				
Venue Name	Tenant(s)	Year Opened	Years Without Major Renovation	Recent Minor Renovation?
Bank of America Stadium	Charlotte FC	1996	27	✓
Lumen Field	Seattle Sounders FC	2002	21	✓
Source: HP				



NBA New Builds 2022-2026

NBA: Recent Renovations and New Builds

2022

- Construction on multi-year renovation of Paycom Center in Oklahoma City began

2023

- Gainbridge Fieldhouse renovation/ district in Indianapolis completed
- Spectrum Center renovation in Charlotte to begin
- Renovations to be completed on the Wells Fargo Center in Philadelphia

2024

- Los Angeles Clipper's Intuit Dome expected to be finished

TBD

- All Net Resort and Arena experiencing funding issues
- "76 Place" expected to open 2031
- FedEx Forum in Memphis Major Renovation expected to take place



Intuit Dome

Inglewood, CA

- **NBA Franchise: Los Angeles Clippers**
- **Reported Cost: \$1.2 Billion**
- **Open Date: 2024-2025 Season**



All Net Resort and Arena

Las Vegas, Nevada



- **Hotel, Retail, Restaurants, Multi-Use Indoor Arena**
- **Reported Cost: \$4.9 billion**
- **NBA Franchise? TBD**
- **Construction begins in Sept 2023; Scheduled to open in 2025**

Las Vegas Arena

Las Vegas, Nevada

- 
- An aerial photograph of Las Vegas at dusk. The city lights are visible, and the sky is a mix of dark blues and oranges from the setting sun. In the foreground, a large, modern building with a glass facade is visible. To the right, a large, empty lot is highlighted with a red outline, indicating the site for the new arena. The surrounding area includes various commercial buildings and parking lots.
- Oak View Group planning 20,000-seat arena on the Las Vegas Strip
 - Reported Cost: \$3 Billion (includes mixed-use)
 - NBA Franchise? TBD
 - Planning to break ground in 2023

76 Place at Market East

Philadelphia, Pennsylvania

- Capacity: 18,500
- Reported Cost: \$1.6 billion
- NBA Franchise: Philadelphia 76ers
- Proposed Opening Date: 2031



Renovated NBA Arenas 2022-2026

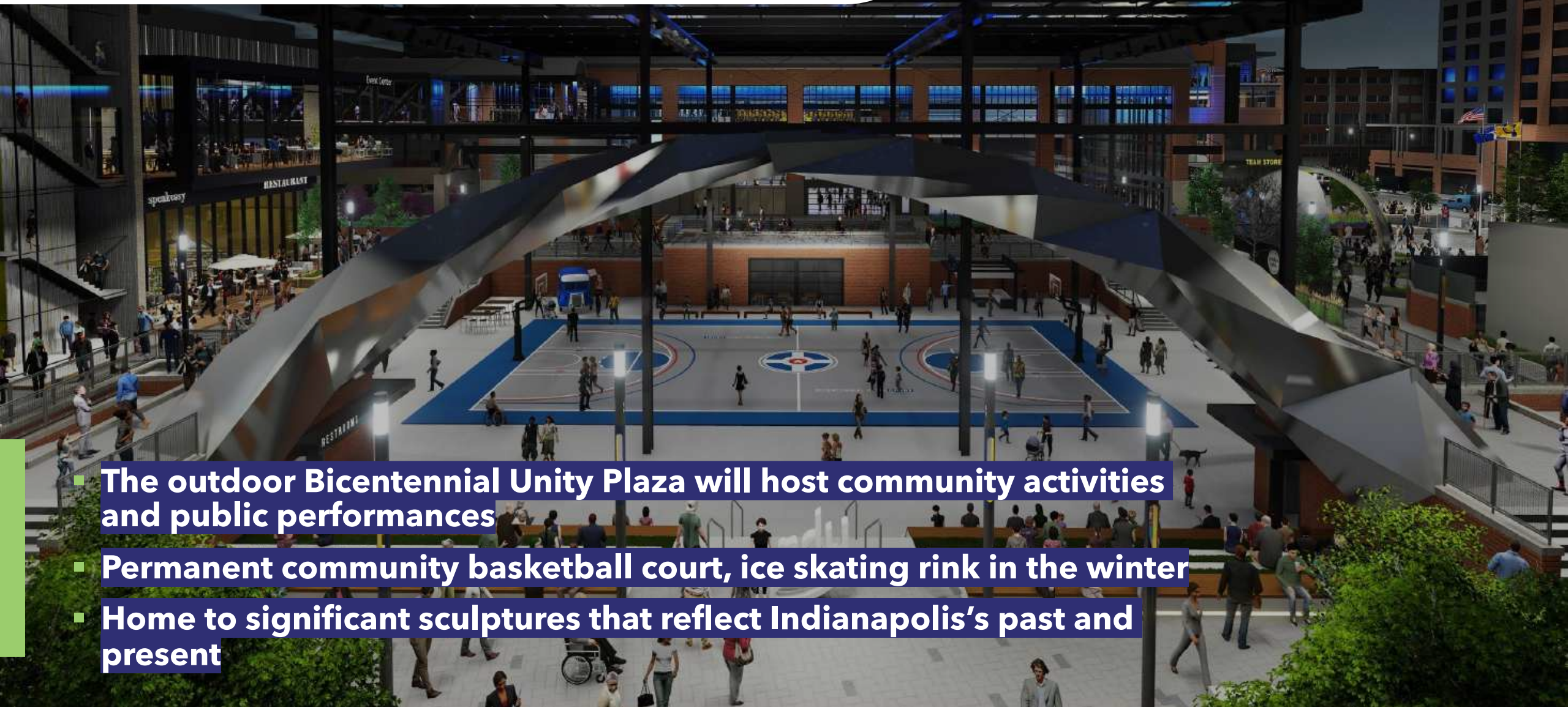
Gainbridge Fieldhouse

Indianapolis, Indiana

- 
- **NBA Franchise: Indiana Pacers**
 - **Reported Renovation Cost: \$360 million**
 - **First Season in Renovated Facility: 2022-2023**
 - **New outdoor plaza, lower-level improvements, balcony area**

Gainbridge Fieldhouse

Indianapolis, Indiana



- The outdoor Bicentennial Unity Plaza will host community activities and public performances
- Permanent community basketball court, ice skating rink in the winter
- Home to significant sculptures that reflect Indianapolis's past and present

Spectrum Center

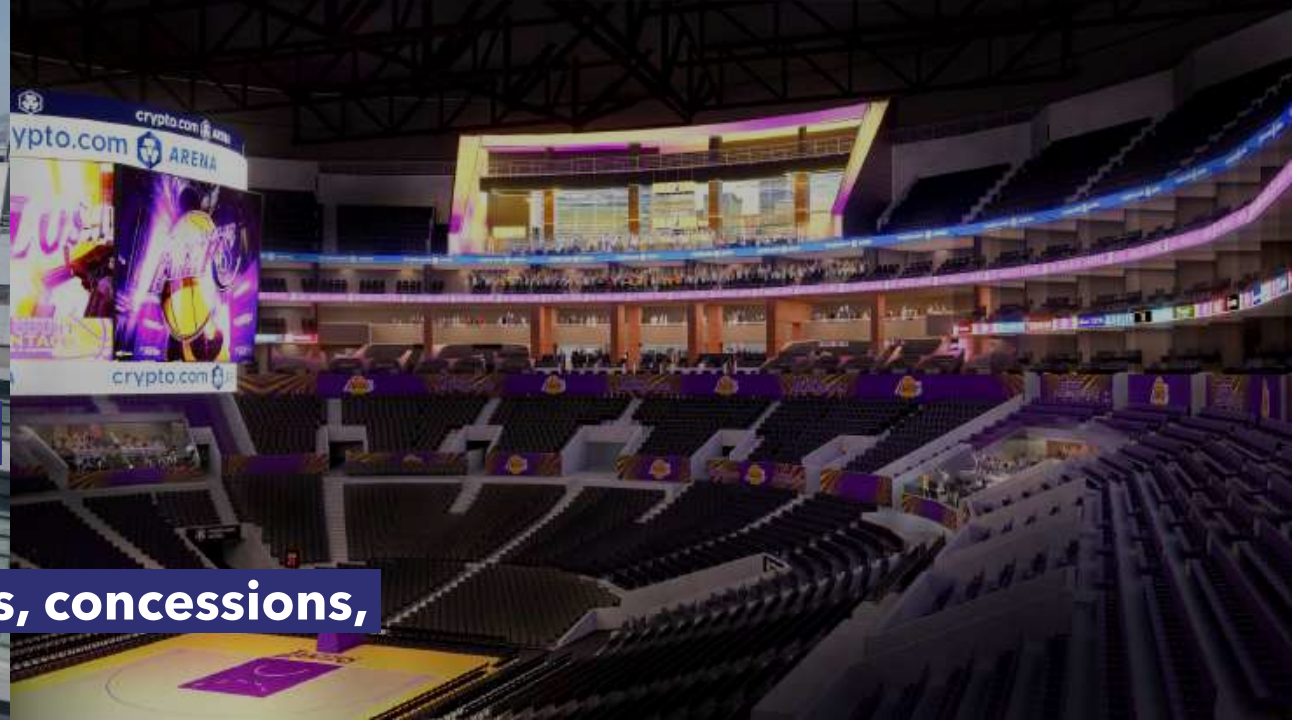
Charlotte, North Carolina



- **NBA Franchise: Charlotte Hornets**
- **Reported Renovation Cost: \$215 million**
- **Multi-Phase Renovation**
- **Improvements to roof, elevators, bathrooms, and entrances**

Crypto.com Arena

Los Angeles, California



- **NBA Franchise: Lakers**
- **Reported Renovation Cost: \$100 + million**
- **Multi-Phase Renovation**
- **Renovations: LED boards, concourses, bars, concessions, clubs, public plaza, and a outdoor terrace**

NBA Venues Without Major Renovations

Longest Time Without a Major Renovation (NBA)				
Venue Name	Tenant(s)	Year Opened	Years Without Major Renovation	Recent Minor Renovation?
Moda Center	Portland Trailblazers	1995	28	X
Smoothie King Center	New Orleans Pelicans	1999	24	X
Kaseya Center	Miami Heat	1999	24	X
Ball Arena	Denver Nuggets	1999	24	X
Crypto.com Arena*	LA Lakers, LA Clippers	1999	24	X
* planned renovation				
Source: HP				



NFL New Builds 2021-2026

NFL: Recent Renovations and New Builds

2023

- Renovations completed on Gillette Stadium in Foxborough
- Denver Broncos' begin renovation on Mile High stadium
- Dallas Cowboys to begin Stadium Upgrades

2024

- Construction to begin on New Tennessee Titans Stadium
- Caesar's Superdome Renovations to be complete

2026

- Buffalo Bills new stadium expected to be completed in Orchard Park
- Construction to begin on Jacksonville Jaguars' Stadium of the Future
- Construction to begin on Cleveland Browns' Stadium Renovation

TBD

- Washington Commanders and Chicago Bears both seek new arrangements
- San Francisco 49ers to renovate Levi's Stadium
- Major renovation of Carolina Panther's Stadium

New Buffalo Bills Stadium

Orchard Park, New York

- **NFL Franchise: Buffalo Bills**
- **Reported Cost: \$1.5 Billion**
- **Opening Year/Season: 2026-2027**



Tennessee Titans New Stadium

Nashville, Tennessee

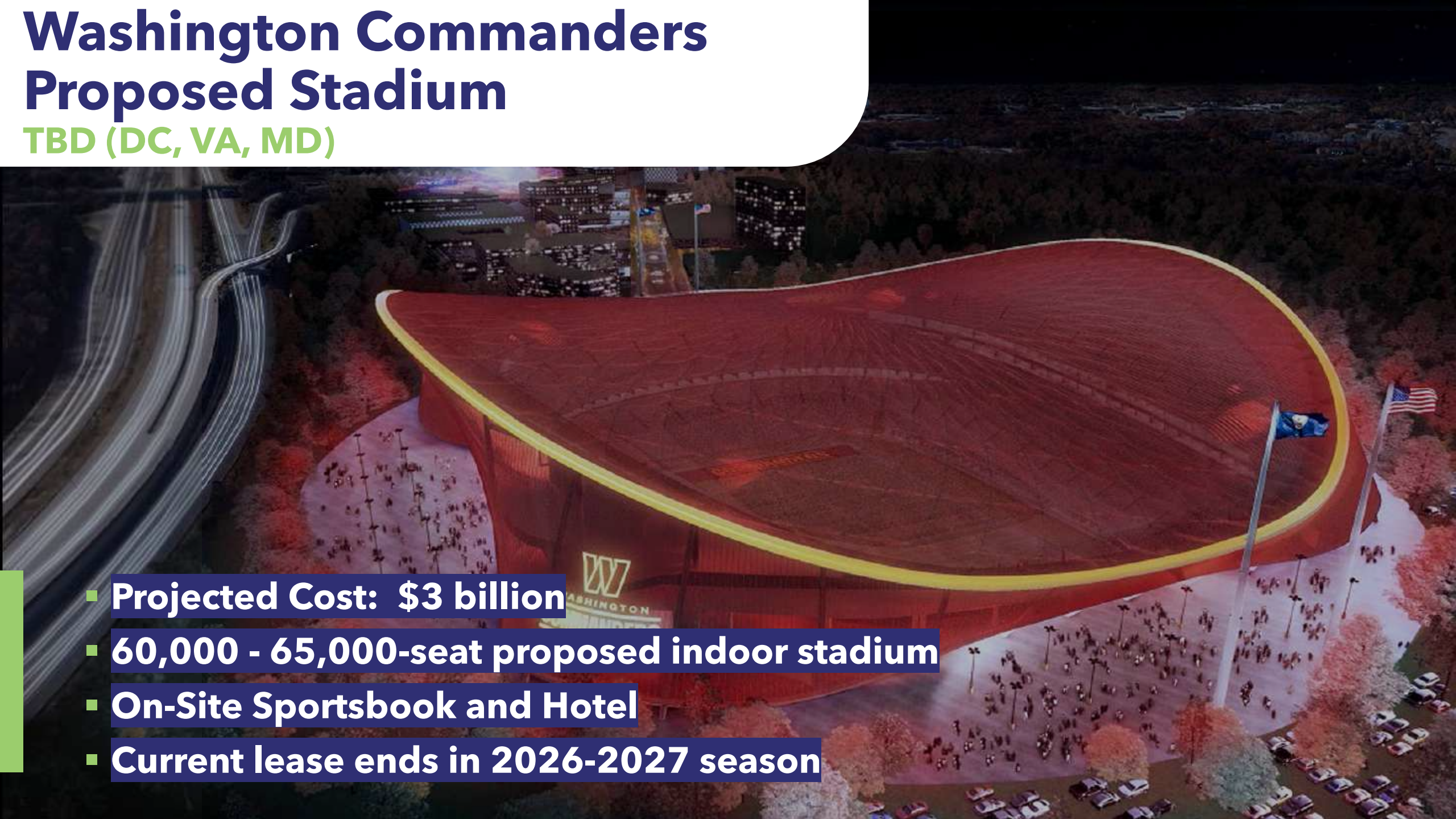


- Reported Cost: \$2.1 Billion
- Groundbreaking in 2024; Open by 2027 Season
- City/State: \$500 million in funding

Washington Commanders Proposed Stadium

TBD (DC, VA, MD)

- **Projected Cost: \$3 billion**
- **60,000 - 65,000-seat proposed indoor stadium**
- **On-Site Sportsbook and Hotel**
- **Current lease ends in 2026-2027 season**



Cleveland Browns

Cleveland, Ohio

- 
- **Reported Cost: \$1 billion (includes district)**
 - **Construction starting in 2026; could take 3 years**
 - **Renovations: lakefront development, the Browns' Berea campus, mixed-use developments around both plus a relocated Shoreway**

Chicago Bears Proposed Stadium

Arlington Heights, IL or Chicago, Illinois

- Agreed to purchase the Arlington International Racecourse
- Due to a reassessment of the land, the property value increased from their past agreement
- Now Naperville, Waukegan, Aurora, and Rockford have joined the race to land the Bears



Renovated NFL Stadiums 2022-2026

Gillette Stadium

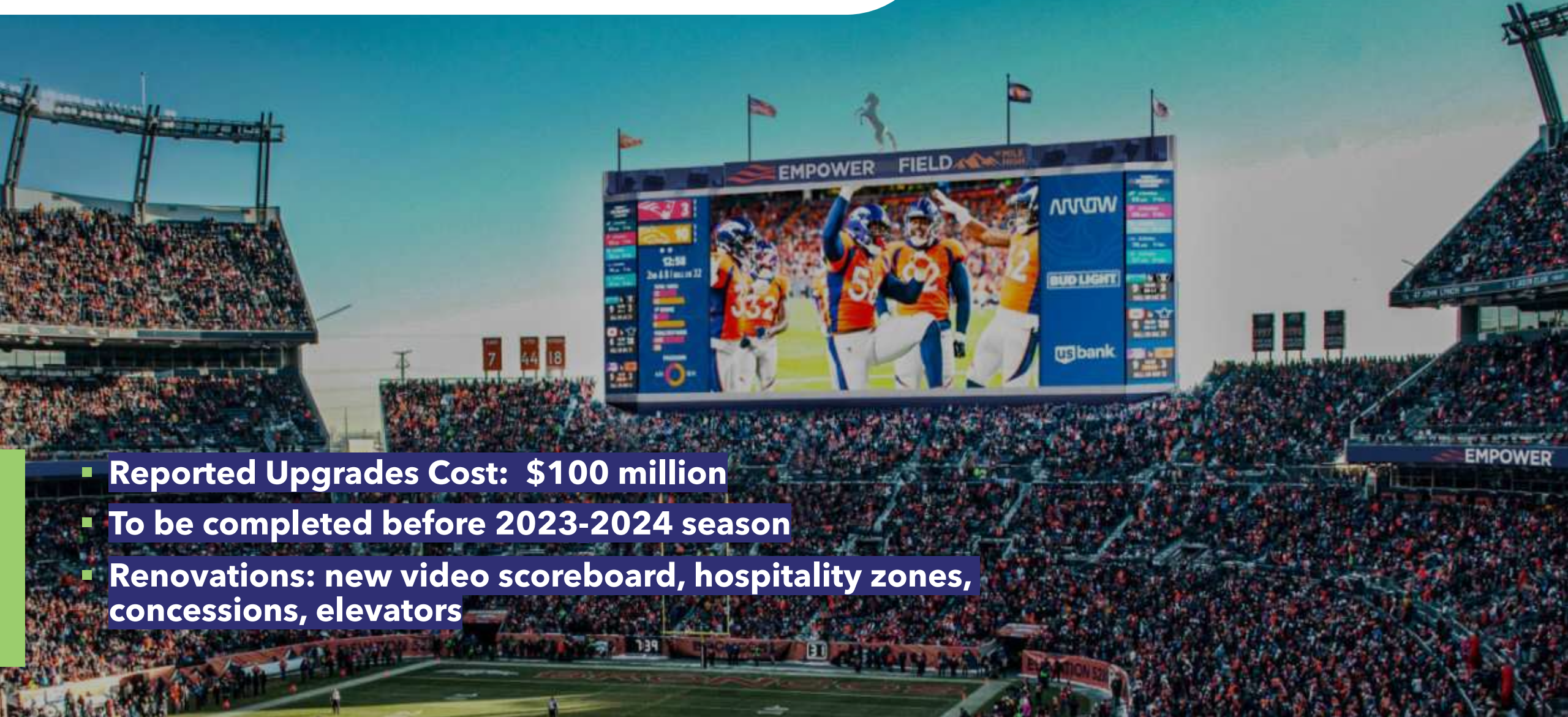
Foxborough, Massachusetts

- 
- A wide-angle photograph of the exterior of Gillette Stadium. The stadium's modern architecture features large glass panels and a prominent, tall, tan-colored tower with a blue and white top section. The words "Gillette STADIUM" are visible on the building's facade. A large banner with the text "GET LOUD GET LOUD" is displayed. In the foreground, a paved plaza with people walking is visible. To the right, a sign for the "CROSS PAVILION" is seen. In the sky, a formation of jets leaves white smoke trails.
- **NFL Franchise: New England Patriots**
 - **Reported Renovation Costs: \$225 million**
 - **First Season in Renovated Facility: 2023-2024**
 - **New entry plaza, adding hospitality and function spaces**

Empower Field


Denver, Colorado

- **Reported Upgrades Cost: \$100 million**
- **To be completed before 2023-2024 season**
- **Renovations: new video scoreboard, hospitality zones, concessions, elevators**




Caesars Superdome

New Orleans, Louisiana

- 
- **NFL Franchise: New Orleans Saints**
 - **Reported Renovation Costs: \$450 million**
 - **Opening Year/Season: 2024-2025**
 - **Sideline club seats, atrium entrances, new fan zones**

TIAA Bank Field

Jacksonville, Florida


- 
- An architectural rendering of the TIAA Bank Field stadium in Jacksonville, Florida, shown at dusk. The stadium features a large, curved, translucent roof with a blue and white color scheme. The facade is illuminated with bright blue and white lights. A large banner for the Jacksonville Jaguars is visible on the side of the stadium. The foreground shows a wide, paved plaza with many people walking, and a green lawn area to the left. The sky is a deep blue with some clouds.
- **NFL Franchise: Jacksonville Jaguars**
 - **Reported Renovation Costs: \$1.4 billion**
 - **Opening Year/Season: TBD**
 - **Shaded seating, wider concourses, restroom and concession upgrades**

NFL Venues Without Major Renovations

Longest Time Without a Major Renovation (NFL)

Venue Name	Tenant(s)	Year Opened	Years Without Major Renovation	Recent Minor Renovation?
Bank of America Stadium	Carolina Panthers	1996	27	✓
Acrisure Stadium	Pittsburgh Steelers	2001	22	✗
Lumen Field	Seattle Seahawks	2002	21	✗
NRG Stadium	Houston Texans	2002	21	✓

Source: HP



MLB New Builds 2022-2026

MLB: Recent Renovations and New Builds

2022

- Renovations approved for Oriole Park at Camden Yards in Baltimore

2023

- Renovations set to begin in Toronto on the Rogers Centre
- \$200M+ upgrades expected to start on Progressive Field in Cleveland
- 10-year, \$280M renovation plan begins on T-Mobile Park in Seattle
- Construction to begin on Minute Maid Park entertainment district in Houston

TBD

- Oakland Athletics new ballpark
- Tampa Bay Rays seek new arrangement
- Arizona Diamondbacks seek new arrangement
- Kansas City Royals new ballpark

Oakland Athletics Ballpark

Las Vegas Strip

- 
- An aerial view of the Oakland Athletics Ballpark in Las Vegas. The stadium is filled with spectators, and the field is visible. In the background, the Las Vegas skyline is visible, including the MGM Grand. The stadium's architecture features green and gold colors, reflecting the team's branding. A large scoreboard is visible on the right side of the stadium.
- **MLB Franchise: Oakland Athletics**
 - **Reported Cost: \$1.5 Billion**
 - **Opening Year/Season: 2028**
 - **State legislature recently approved \$380 million of taxpayer funds**

Tampa Bay Rays

TBD

- 
- Ownership seeking agreement by the years end to build a new stadium
 - Current facility has tough location and accessibility
 - Various projects sites have been discussed in Tampa, St. Petersburg, and Ybor City

Kansas City Royals New Stadium

Kansas City, Missouri

- 
- An aerial architectural rendering of the proposed Kansas City Royals stadium and its surrounding urban environment. The stadium is a large, modern structure with a curved, white roof and a green field. It is surrounded by a mix of green spaces, walkways, and modern buildings. A large, multi-story glass skyscraper is prominent on the right side of the image. The scene is populated with small figures of people, suggesting a vibrant, active area. The overall design emphasizes a blend of sports, urban development, and green space.
- **Reported Cost: \$2 billion**
 - **Expected Move in Date: 2027 or 2028**
 - **City/State: \$350 million in funding**
 - **Down to two location: Downtown Kansas City and North Kansas City**

Renovated MLB Stadiums 2021-2026


Chase Field

Phoenix, Arizona

- 
- An aerial photograph of Chase Field stadium in Phoenix, Arizona. The image shows the baseball field with its green grass and brown dirt base paths. The seating bowl is filled with blue seats, and the stadium's retractable roof is visible in the background. The outfield scoreboard and various advertisements are visible along the top of the stadium.
- Arizona Diamondbacks deciding on renovation vs. new stadium
 - Renovations would cost hundreds of millions
 - Current lease up after 2027 season
 - Ballpark sales tax approved by Arizona state legislature which underwrites 80% of the cost of a new stadium

Oriole Park at Camden Yards

Baltimore, Maryland

- 
- An aerial photograph of Oriole Park at Camden Yards, a baseball stadium in Baltimore, Maryland. The stadium features a large green field with a white infield, surrounded by tiered seating areas. The stadium is situated in an urban environment, with various buildings and streets visible in the background.
- **MLB Franchise: Baltimore Orioles**
 - **Reported Cost: ~\$600 million**
 - **Opening Year/Season: TBD**
 - **State funding approved in 2022 for Oriole Park and M&T Bank Stadium (Baltimore Ravens) upgrades**

Rogers Centre

Toronto, Ontario

- **MLB Franchise: Toronto Blue Jays**
- **Reported Cost: \$300 million**
- **Opening Year/Season: 2024-2025**
- **Lower bowl and concourse renovations, 240% larger scoreboard, replacing a restaurant**



Progressive Field

Cleveland, Ohio

- 
- An architectural rendering of the interior of Progressive Field stadium. The view is from an elevated position looking down towards the field. The stadium is filled with spectators in the tiered seating areas. The upper concourse is visible, featuring a large, curved scoreboard or display structure with a red 'C' logo and the word 'CLEVELAND' in red lettering. People are walking on the concourse, and some are sitting at tables. The sky is visible in the background, showing a clear blue day.
- **MLB Franchise: Cleveland Guardians**
 - **Reported Cost: \$203 million**
 - **Opening Year/Season: 2025-2026**
 - **Expansion and upgrading of the Terrace Club, renovating upper concourse**

T-Mobile Park

Seattle, Washington

- **MLB Franchise: Seattle Mariners**
- **Reported Cost: \$280 million**
- **10-Year Renovation Plan**
- **Renovating Diamond Club and press area, adding more premium space**

- 100

MLB Venues Without Major Renovations

Longest Time Without a Major Renovation (MLB)				
Venue Name	Tenant(s)	Year Opened	Years Without Major Renovation	Recent Minor Renovation?
Angel Stadium	Los Angeles Angels	1966	57	X
Tropicana Field	Tampa Bay Rays	1990	33	X
Comerica Park	Detroit Tigers	2000	23	X
Oracle Park	San Francisco Giants	2000	23	X
Minute Maid Park	Houston Astros	2000	23	✓
American Family Field	Milwaukee Brewers	2001	22	✓
PNC Park	Pittsburgh Pirates	2001	22	X
Source: HP				



NHL New Builds 2022-2026

NHL: Recent Renovations and New Builds

2022

- Mixed-use development surrounding SAP Center in San Jose proposed
- Rogers Place ICE District in Edmonton opened

2023

- Wells Fargo Center renovations completed in Philadelphia

2024

- Construction on Ottawa Senators new arena set to begin
- Entertainment district surrounding the Honda Center in Anaheim set to be completed

2025

- \$225M+ renovations set to begin in PNC Arena in Raleigh

TBD

- Calgary Flames seeking new arrangement
- Arizona Coyotes seeking new arrangement

Ottawa Senators Proposed Arena

Ottawa, Ontario



- Ottawa Senators are close to an agreement to lease land for a new arena in Ottawa
- The project is pending final approval
- The project features 800 new housing units, a 'Flats District,' and nightlife entertainment

Calgary Flames

Calgary, Alberta

- 
- A wide-angle photograph of the Calgary skyline. In the foreground, the curved, white roof of the Scotiabank Saddledome is visible, with a red and yellow logo on it. Behind the arena, the city's skyline is filled with various skyscrapers and buildings. The CN Tower is prominent in the center. The sky is clear and blue. The foreground shows some snow on the ground and a few trees.
- City of Calgary reached agreement with Flames owner
 - Estimated Cost: \$1.2 Billion (includes surrounding district)
 - Expected opening Year/Season: 2026 or 2027

Arizona Coyotes Future Unknown

TBD

- 
- Plans of Tempe Entertainment District was rejected by voters
 - Six new potential sites in the Phoenix Area
 - Houston, Portland, and Milwaukee among many options outside AZ

PNC Arena

Raleigh, North Carolina



- **NHL Franchise: Carolina Hurricanes**
- **Reported Renovation Costs: \$225+ million**
- **Opening Year/Season: 2025-2026**
- **New roof, modern amenities**


NHL Venues Without Major Renovations

Longest Time Without a Major Renovation (NHL)				
Venue Name	Tenant(s)	Year Opened	Years Without Major Renovation	Recent Minor Renovation?
KeyBank Center	Buffalo Sabres	1996	27	X
Bridgestone Arena	Nashville Predators	1996	27	✓
Amalie Arena	Tampa Bay Lightning	1996	27	✓
Source: HP				

Mixed-Use Developments and Entertainment Districts

Minute Maid Park Mixed-Use Development

Houston, Texas

- 
- **MLB Franchise: Houston Astros**
 - **Mixed-use development planned next to the ballpark and Union Station in downtown Houston**
 - **Owned and developed by the team**
 - **Construction set to begin later this year and take approximately 3 years**

Cleveland Browns

Cleveland, Ohio

- 
- **Reported Cost: \$1 billion (includes district)**
 - **Construction starting in 2026; could take 3 years**
 - **Renovations: lakefront development, the Browns' Berea campus, mixed-use developments around both plus a relocated Shoreway**

Rogers Place ICE District

Edmonton, Canada



- Combines sports, entertainment, residential, hotel, office space, and retail, all centered around a public plaza
- Opened in October 2022
- Reported Cost: \$2.5 Billion
- Hosts year-round outdoor events and entertainment across the street from Rogers Place arena

SAP Center Mixed-Use Development Proposal

San Jose, California

- 
- **NHL Franchise: San Jose Sharks**
 - **Reported Development Cost: \$1 billion**
 - **Downtown West project by Google**
 - **Mixed-use development surrounding the arena**
 - **Office space, 4,000 new residences, 15 acres and a community center**

Honda Center Entertainment District

Anaheim, California

- 
- **NHL Franchise: Anaheim Ducks**
 - **Reported Development Cost: \$4 Billion**
 - **Opening Year: 2025**
 - **Entertainment district surrounding the arena**
 - **Multifamily housing, retail & restaurant, and a hotel**



Special Events

Chicago NASCAR Race

Chicago, Illinois



- Chicago NASCAR Cup Series race was held on a street circuit in July 2023
- The "Grant Park 220" is 220 miles with 100 laps, "The Loop 121" is 121 miles with 55 laps
- Three-year deal
- NBC's most-watched Cup Series race in six years

Las Vegas Grand Prix

Las Vegas, Nevada

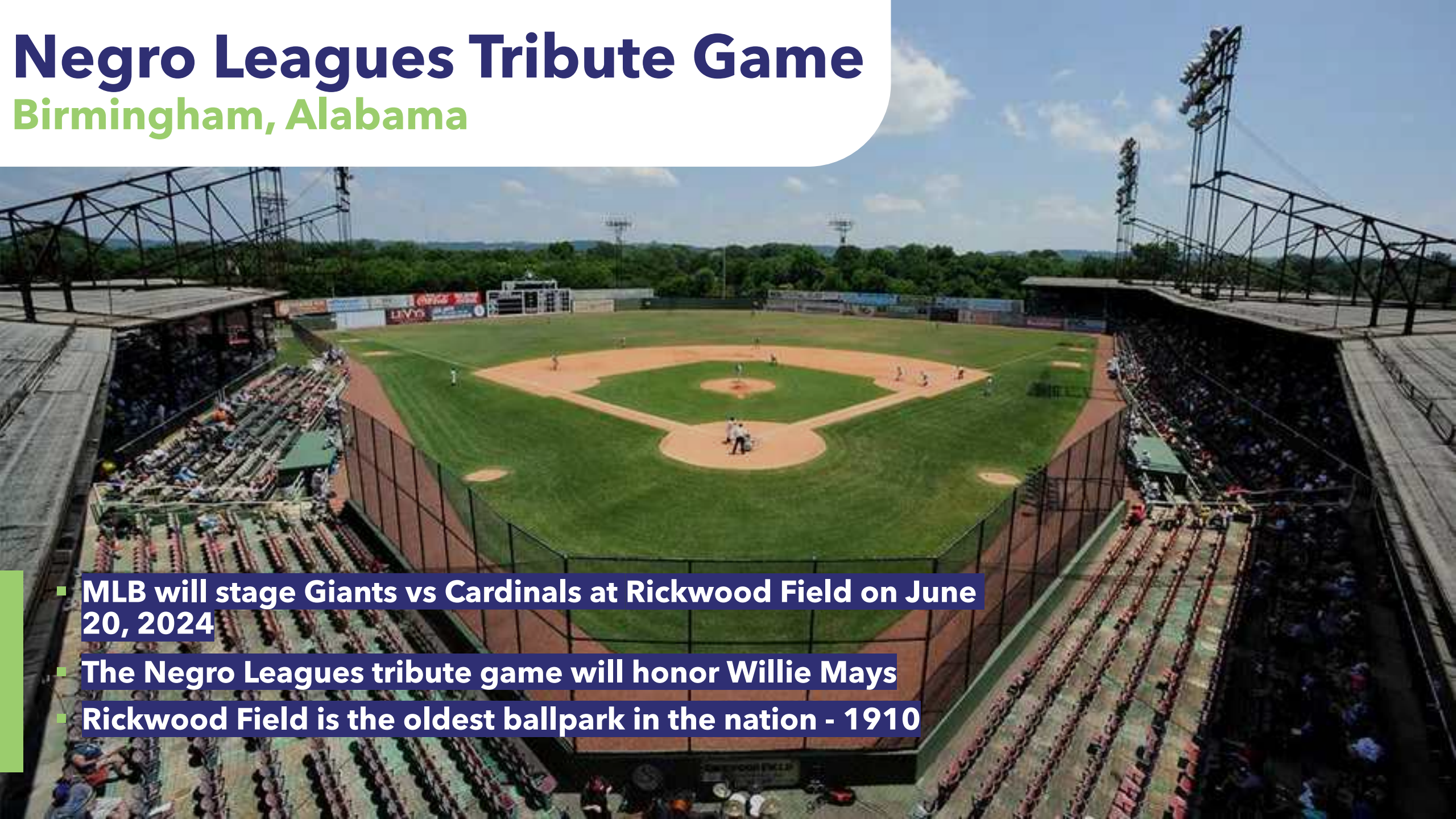


- Formula 1 coming to Las Vegas November 2023
- Race is taking place on a street circuit in the heart of the city
- 50-lap, nighttime race



Negro Leagues Tribute Game

Birmingham, Alabama

- 
- An aerial photograph of Rickwood Field, a historic baseball stadium. The field is green with a brown infield, and several players are visible on the field. The stands are filled with spectators, and the stadium's steel framework is visible. In the background, there are trees and hills under a blue sky with some clouds.
- **MLB will stage Giants vs Cardinals at Rickwood Field on June 20, 2024**
 - **The Negro Leagues tribute game will honor Willie Mays**
 - **Rickwood Field is the oldest ballpark in the nation - 1910**



5

Host City Analysis

Host City Analysis Overview

What it takes to competitively host rotating national and international events

- Analyzes the Top 10 sporting event host cities based on National TV viewership of rotating bid events
- Awards points based on weight of major sporting event and its historic engagement, providing insight on future host cities
- Forecasts future Top 10 host cities over the next 20 years



| How did we award points?

Time Frame: 1997 - 2028

- Includes announced future host cities through 2028

Event Type

- | | |
|---|------------------|
| ■ Olympic Games 2028 Host City | 25 Points |
| ■ FIFA World Cup 2026 Host City | 10 Points |
| ■ Super Bowl | 5 Points |
| ■ NCAA Men's Final Four | 4 Points |
| ■ BCS College Football Playoff/National Championship | 4 Points |
| ■ Men's NCAA Basketball Power 6 Conference Tournament | 3 Points |
| ■ Power 5 College Football Conference Championship Game | 2 Points |

10. Phoenix

Arizona

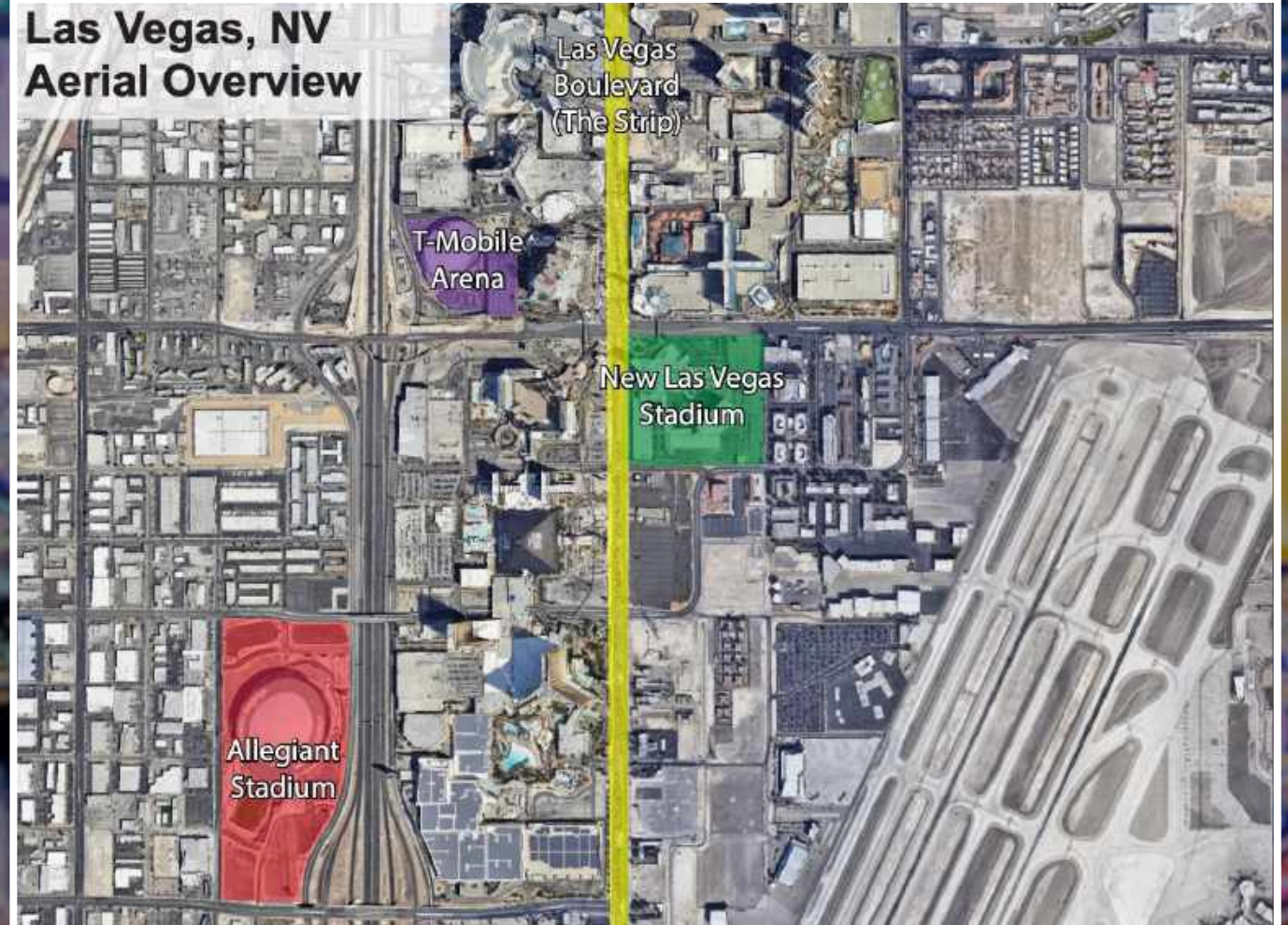
- 3 Super Bowls
- 2 Final Fours
- 5 College Football National Championships
- 1 NCAA Basketball Power 6 Conference Tournament
- 1 Power 5 College Football Conference Championship



9. Las Vegas

Nevada

- **1 Super Bowl**
- **1 Final Four**
- **11 NCAA Basketball Power 6 Conference Tournaments**
- **3 Power 5 College Football Conference Championships**
- **Future FIFA World Cup Host City**

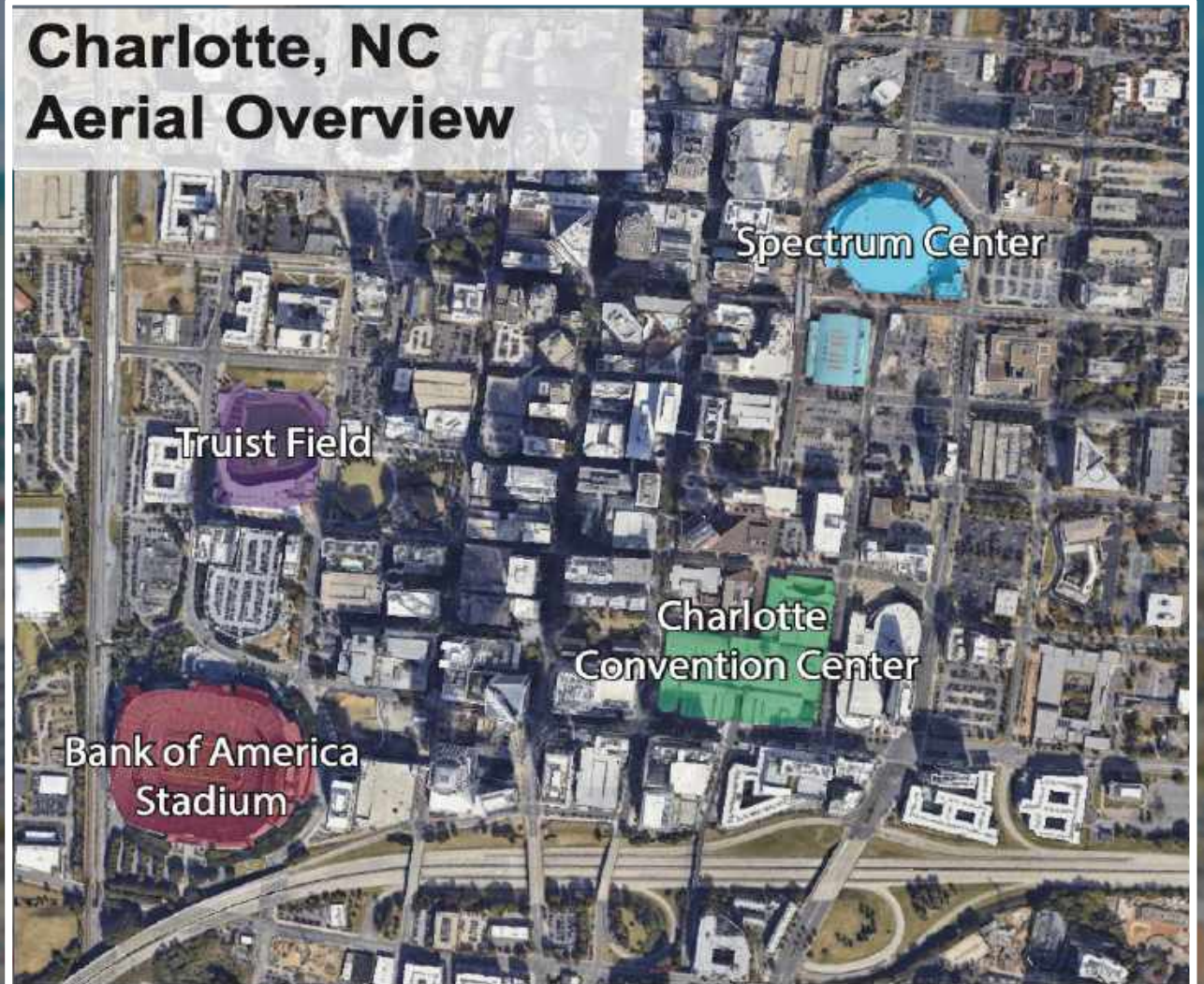


8. Charlotte

North Carolina

- 5 NCAA Basketball Power 6 Conference Tournaments
- 18 Power 5 College Football Conference Championships

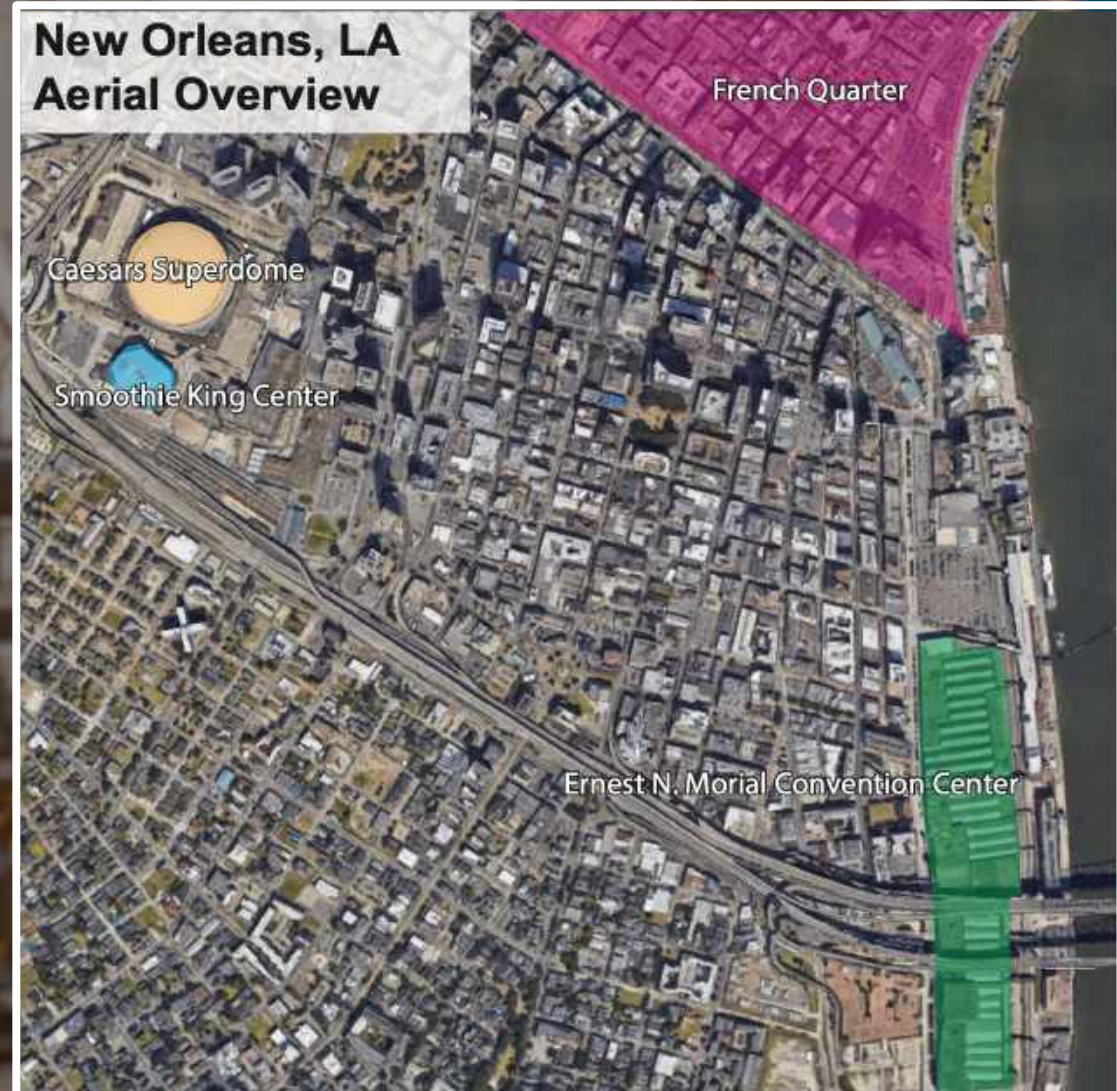
Charlotte, NC Aerial Overview



7. New Orleans

Louisiana

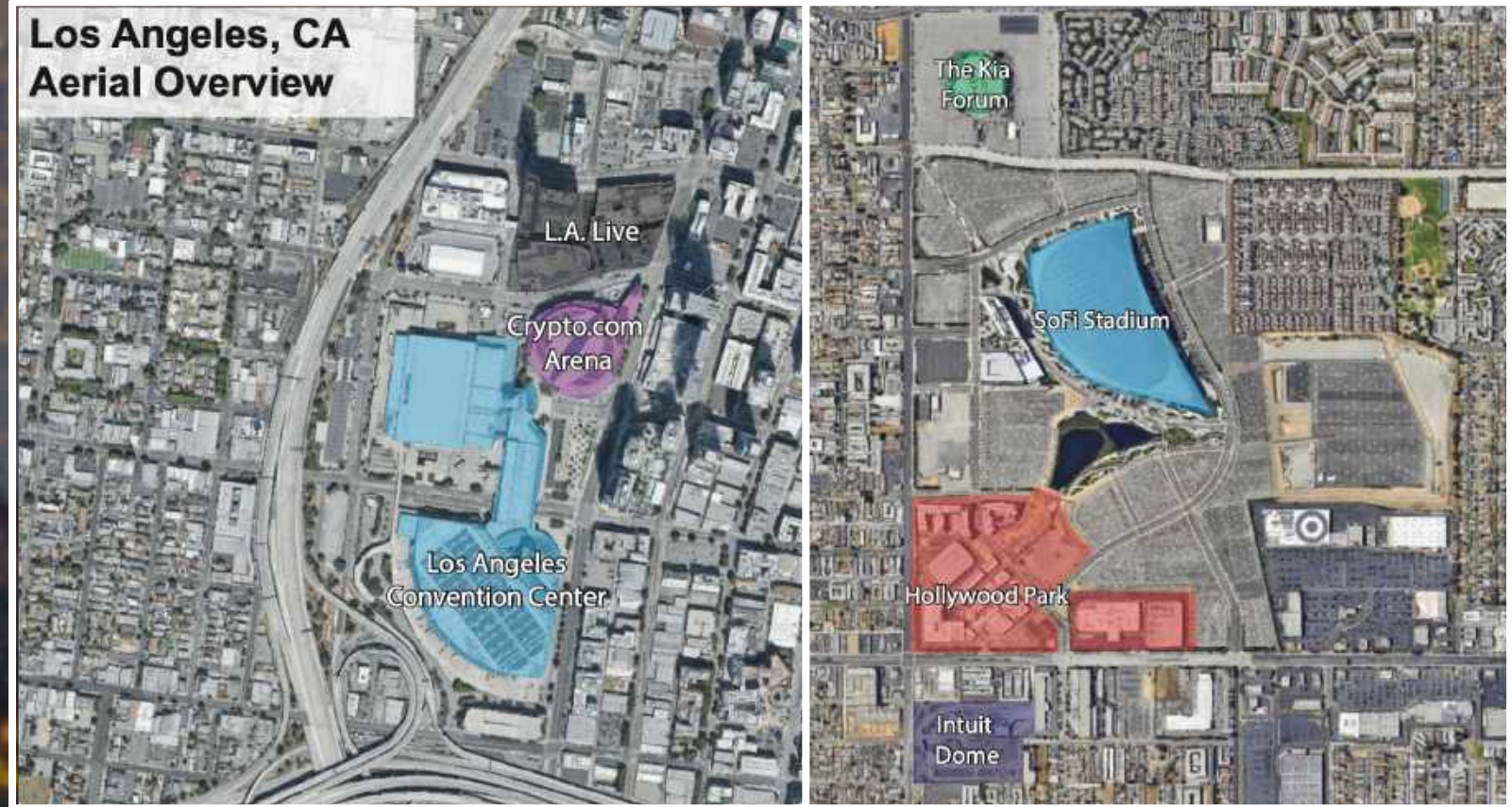
- **3 Super Bowls**
- **3 Final Fours**
- **5 College Football National Championships**
- **3 NCAA Basketball Power 6 Conference Tournaments**



6. Los Angeles

California

- **1 Super Bowl**
- **4 College Football National Championships**
- **11 NCAA Basketball Power 6 Conference Tournaments**
- **1 Power 5 College Football Conference Championship**
- **Future FIFA World Cup Host City**



5. Dallas - Fort Worth

Texas

- **1 Super Bowl**
- **2 Final Fours**
- **1 College Football National Championship**
- **3 NCAA Basketball Power 6 Conference Tournaments**
- **18 Power 5 College Football Conference Championships**
- **Future FIFA World Cup Host City**



4. Kansas City

Missouri

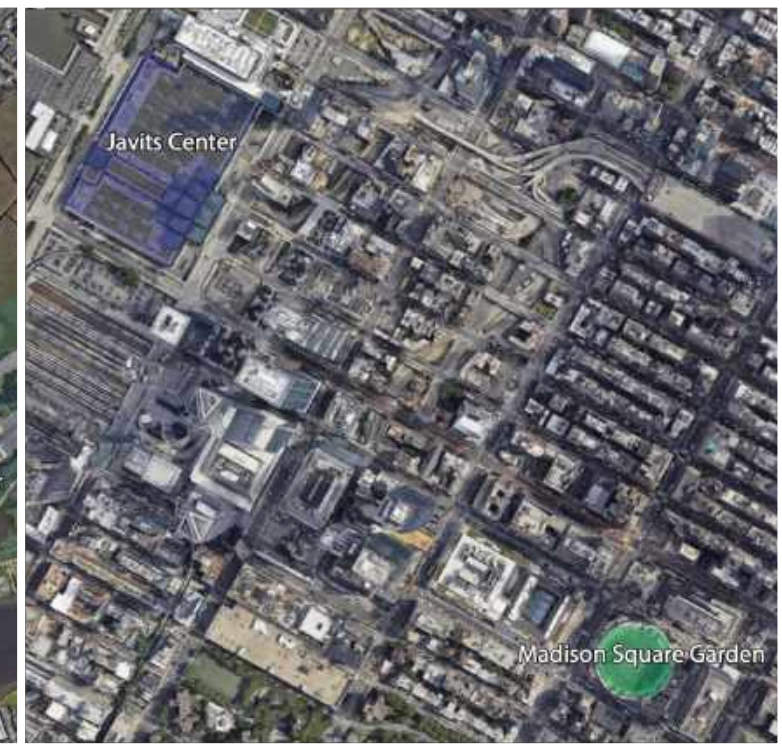
- 26 NCAA Basketball Power 6 Conference Tournaments
- 5 Power 5 College Football Championships
- Future FIFA World Cup Host City



3. New York City

New York / New Jersey

- 34 NCAA Basketball Power 6 Conference Tournaments
- 1 Super Bowl
- 1 College Football National Championship
- Future FIFA World Cup Host City



2. Indianapolis

Indiana

- **1 Super Bowl**
- **8 Final Fours**
- **1 College Football National Championship**
- **12 NCAA Basketball Power 6 Conference Tournaments**
- **14 Power 5 College Football Conference Championships**

Indianapolis, IN
Aerial Overview



1. Atlanta

Georgia

- 2 Super Bowls
- 3 Final Fours
- 2 College Football National Championships
- 13 NCAA Basketball Power 6 Conference Tournaments
- 30 Power 5 College Football Conference Championships
- Future FIFA World Cup Host City

Atlanta, GA
Aerial Overview



Predicted 20-Year Host Cities: New Cities

| How did we make projections?

Time Frame: 2024 - 2043

Projection Rationale

Based on **established patterns of major bid events and the known future booked schedule**, accounting for major new developments and renovations, Hunden projected the twenty-year future of all major markets nationally within the specified scoring system.

| Top 10 Host Cities: Who's in Who's Out

**Who's
Out**

New York

New Orleans

**Who's
In**

Nashville

Jacksonville



So, what's changed?

Nashville

Tennessee

Past Events

- **15 NCAA Basketball Power 6 Conference Tournaments**

Nashville, TN
Aerial Overview



Jacksonville

Florida

Past Events

- **1 Super Bowl**
- **3 Power 5 College Football Conference Championships**

**Jacksonville, FL
Aerial Overview**



New Developments in Nashville & Jacksonville

Nashville

- New Tennessee Titans Stadium and entertainment district



Jacksonville

- Stadium of the Future Renovation and entertainment district



What will the future hold in these two cities?

Current vs. Predicted Future Rankings

Current Rankings by City

Rank	City
1	Atlanta
2	Indianapolis
3	New York, NY/NJ
4	Kansas City
5	Dallas-Ft Worth/Arlington
6	Los Angeles/Pasadena/Inglewood/Anaheim
7	New Orleans
8	Charlotte
9	Las Vegas
10	Phoenix/Glendale/Tempe

Source: HP

Projected Rankings by City

Rank	City	Change
1	Las Vegas	▲
2	Indianapolis	■
3	Phoenix/Glendale/Tempe	▲
4	Nashville	▲
5	Atlanta	▼
6	Dallas-Ft Worth/Arlington	▼
7	Los Angeles/Pasadena/Inglewood/Anaheim	▼
8	Kansas City	▼
9	Charlotte	▼
10	Jacksonville	▲

Source: HP

An aerial photograph of a city skyline, likely New York City, featuring numerous skyscrapers and modern buildings. The image is overlaid with a semi-transparent blue filter. In the foreground, there is a body of water and some lower-rise structures. The sky is a deep blue with some light clouds.

Thank You

Have a great conference!



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

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

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

The firm and its principal have performed more than 800 studies over the past 20 years, with more than \$6.5 billion in built, successful projects.