

Montana ExpoPark

Market Demand, Financial Feasibility and Economic Impact Study Report

February 2011

Submitted by:



MARKIN CONSULTING ■ MAPLE GROVE, MINNESOTA

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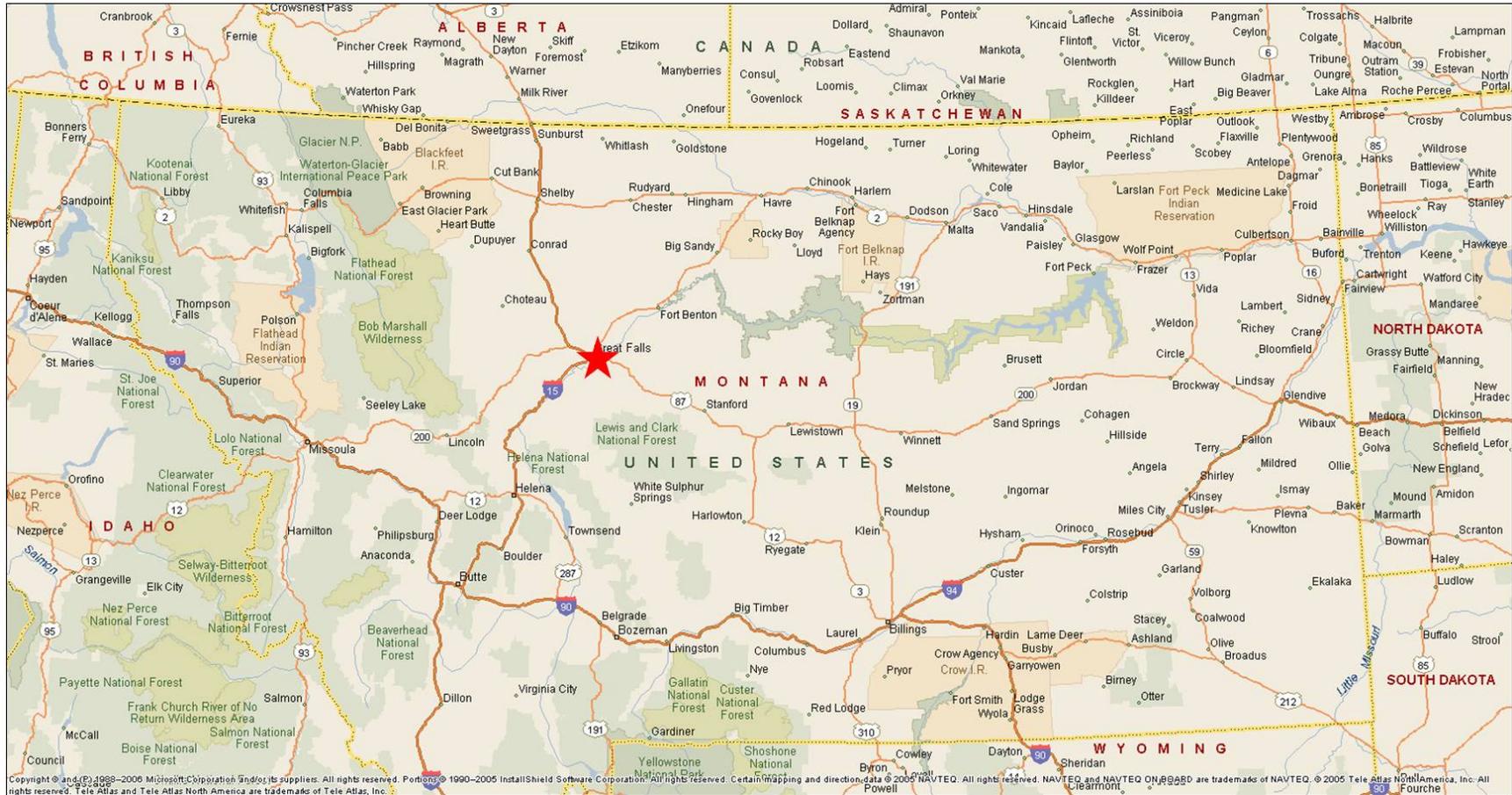
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Exhibits

- Exhibit A – Populous Conditions Report
- Exhibit B – Public Survey Comments
- Exhibit C – Self Promoted Consumer Show Calculations
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SITE FACTORS

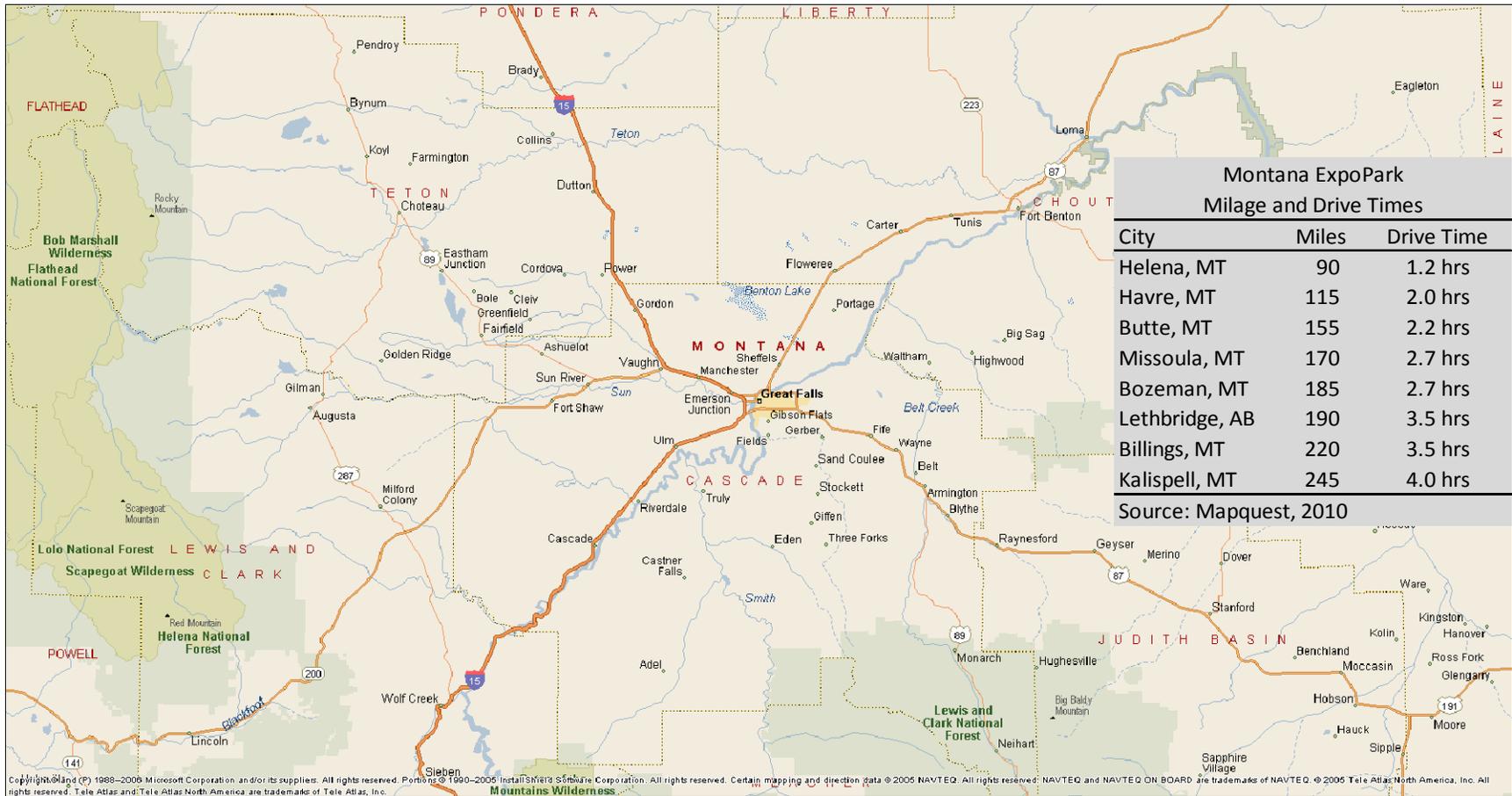
Great Falls in Relation to Montana



The majority of Montana’s population base is located from a line north through Billings and to the western boarder of Montana, putting Great Falls in the center of this population base.

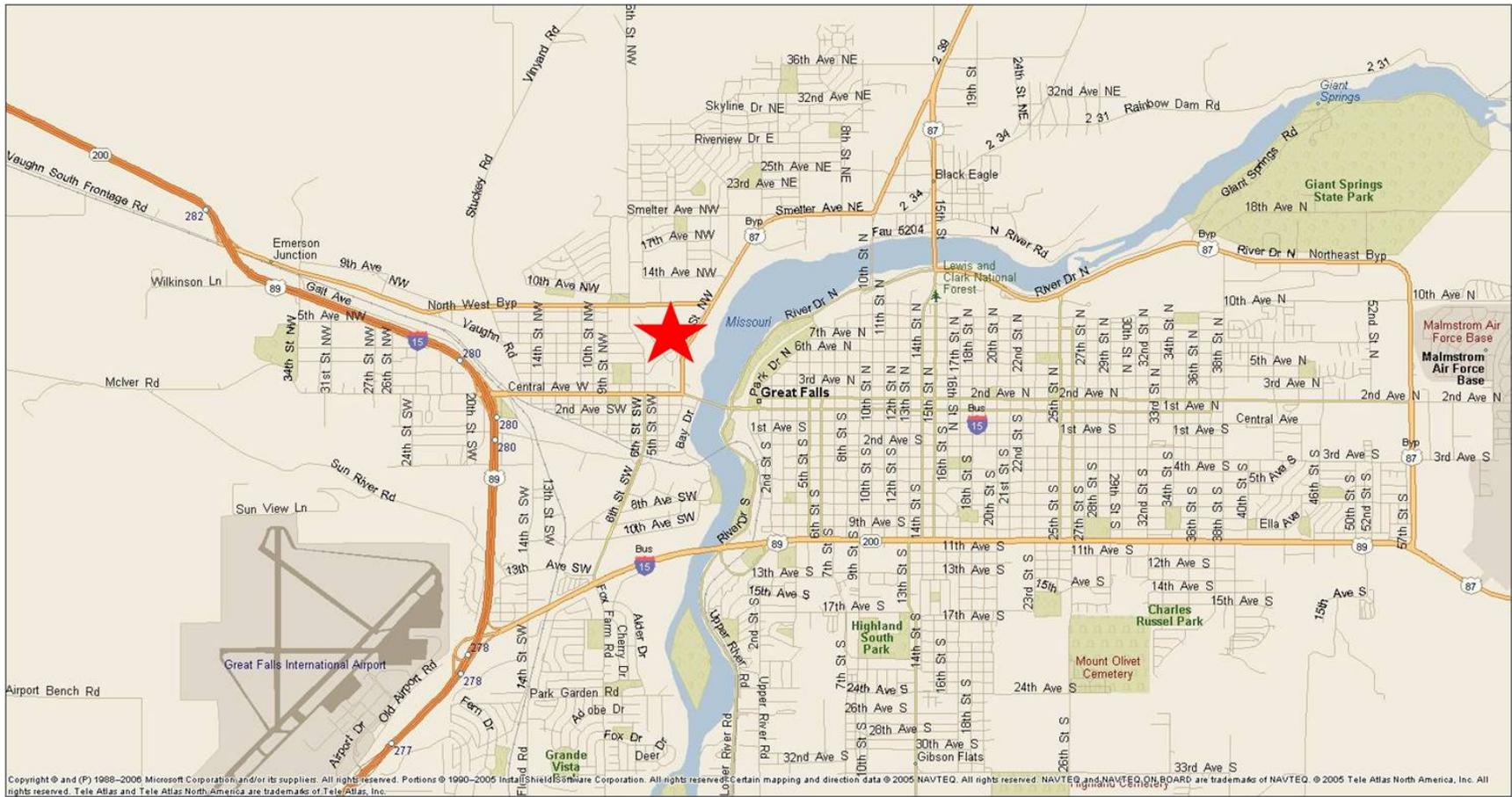
Great Falls is the principal MSA in Montana with very good access to the Canadian market via Interstate 5 to the Canadian border.

Regional Access to Great Falls

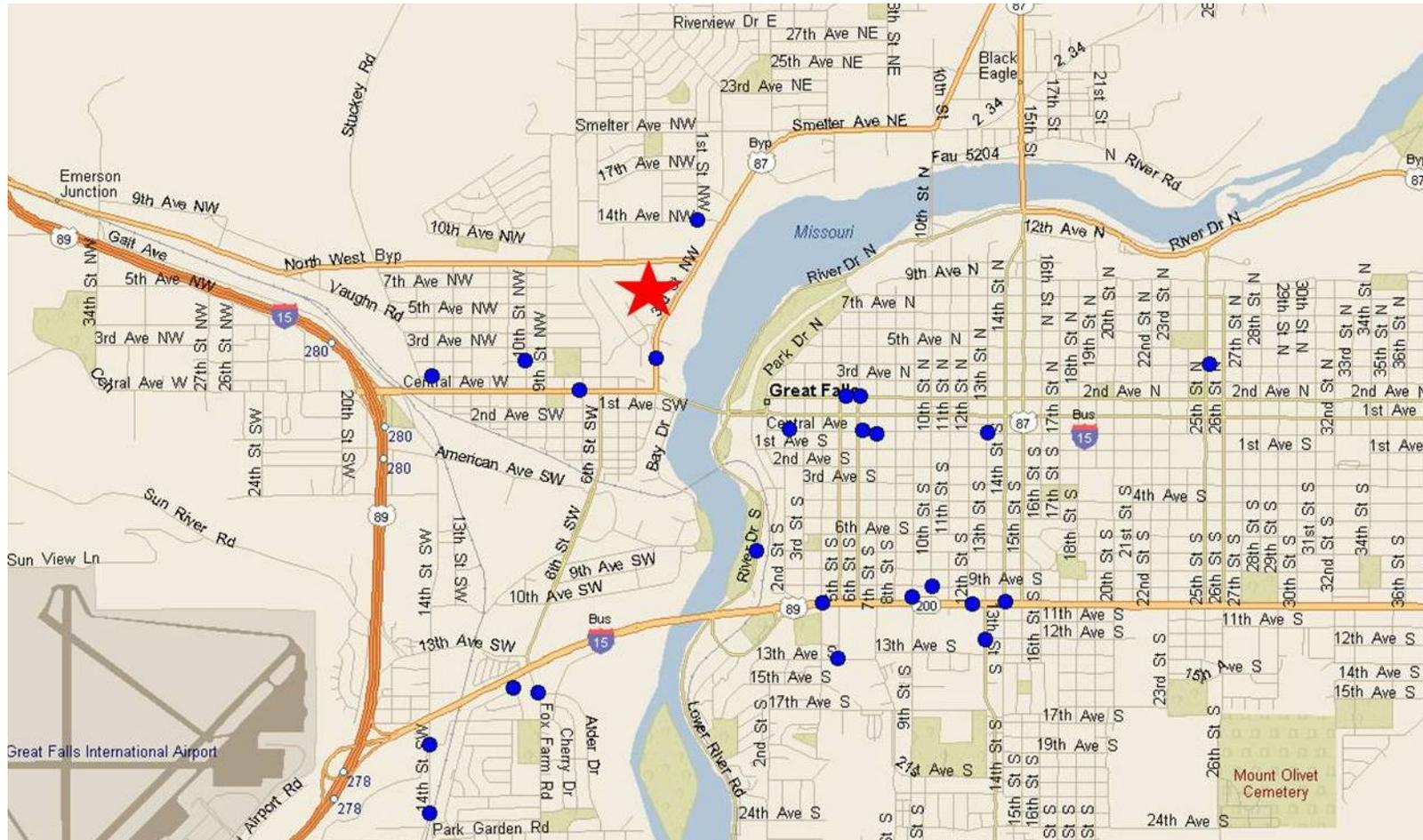


Great Falls is accessible from the north and southwest via Interstate 5; from the northeast and southeast via US Highway 87; from the west via Highway 200 and from the northwest via US Highway 89. Mileage distances and approximate drive times from population centers in Montana and Canada are shown in the map inset above.

Montana ExpoPark in Relation to Great Falls



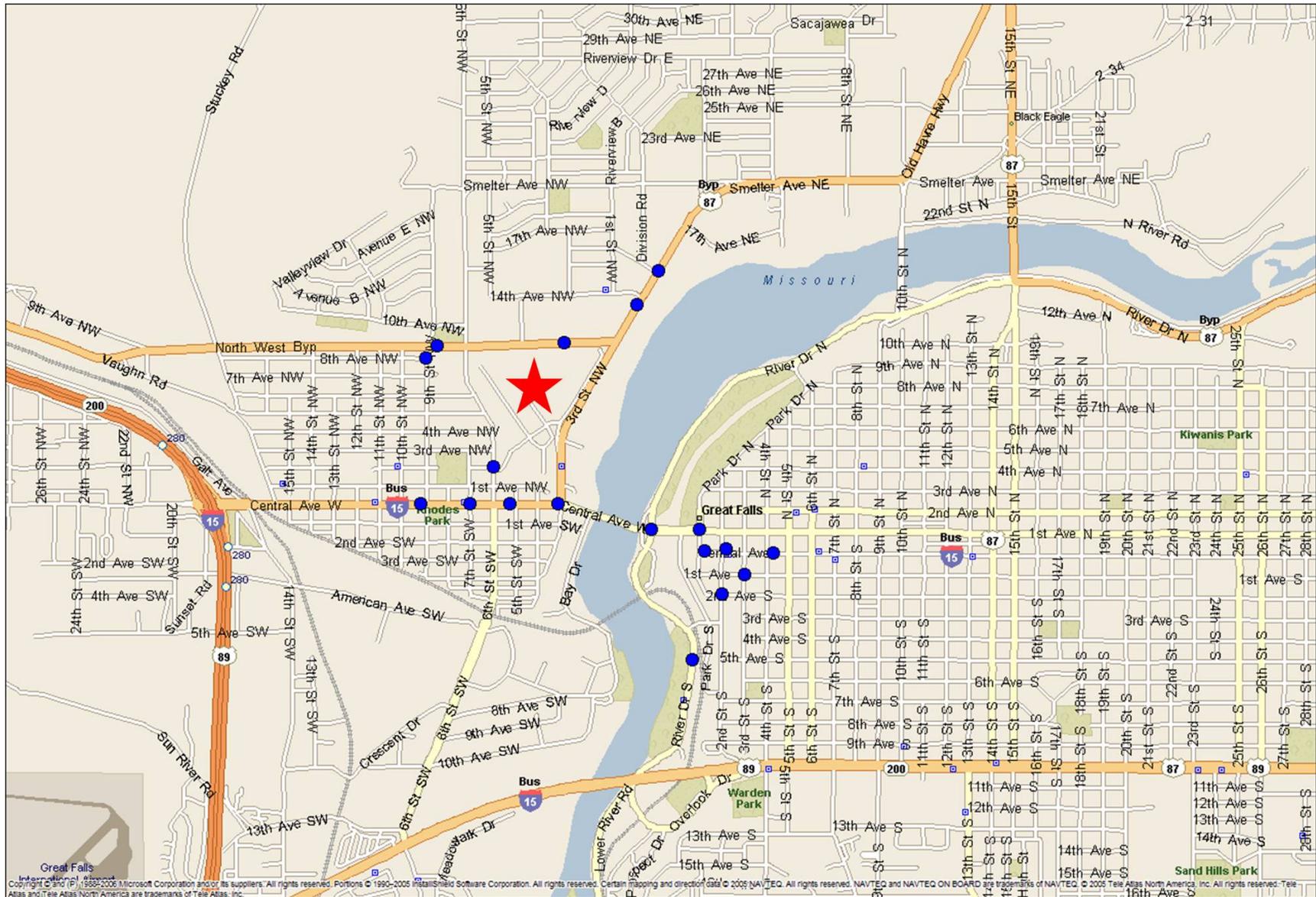
Montana ExpoPark In Relation to Hotels



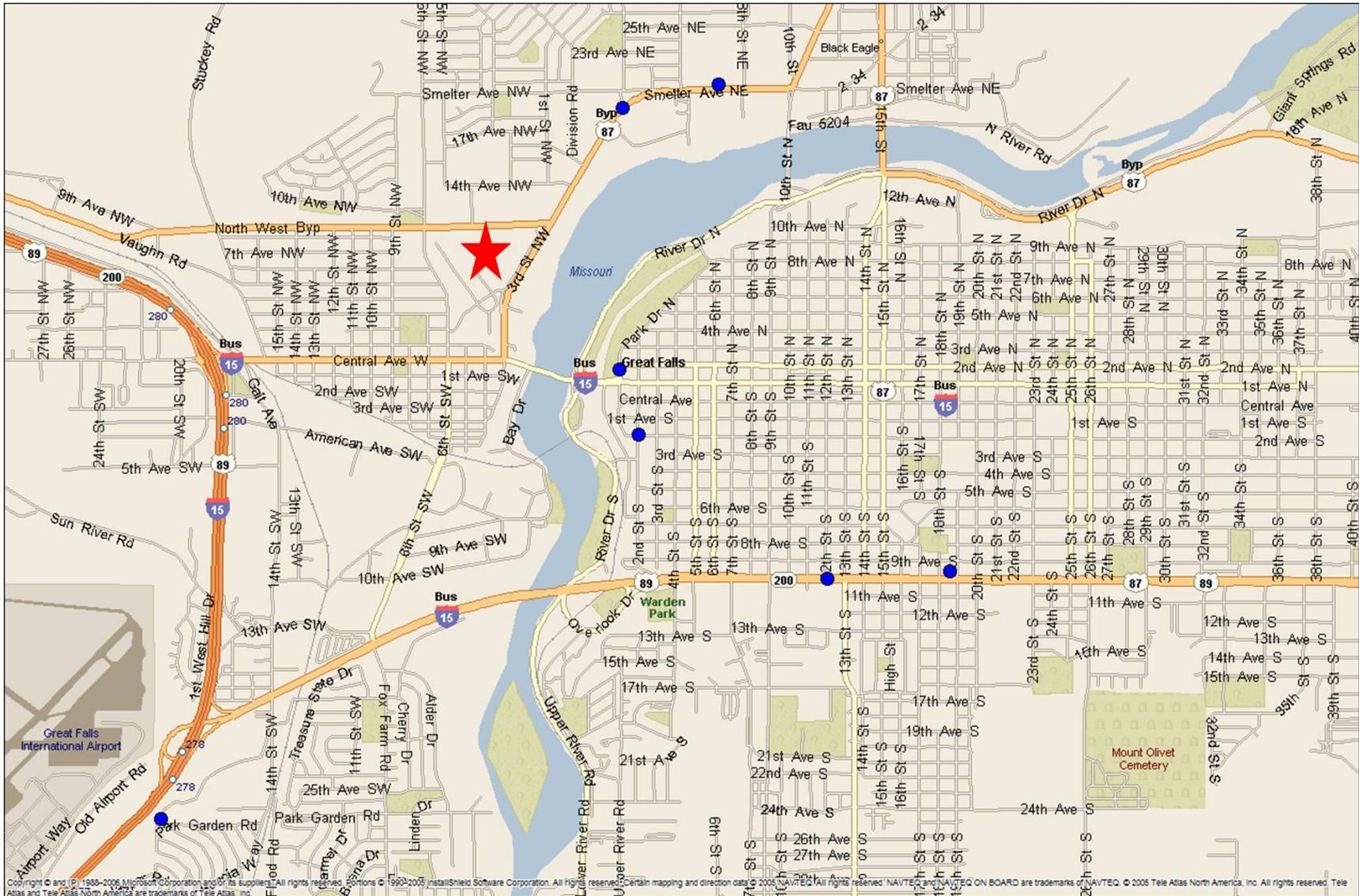
According to the Great Falls Convention and Visitors Bureau, there are over 2,100 lodging rooms in the Great Falls area, as listed in the table below.

Montana Expopark Hotels/Motels in Great Falls	
Property name	Number of Rooms
Best Resting Motel	34
Best Western Heritage Inn	233
Central Motel	30
Comfort Inn	64
Crestview Inn	37
Crystal Inn	86
Days Inn	61
Extended Stay America	104
Fairfield Inn	63
Great Falls Inn	60
Hampton Inn	97
Hilton Gerden Inn	118
Holiday Inn	168
Holiday Inn Express	95
Imperial Inn	30
La Quinta Inn and Suites	92
Malmstrom Inns	83
Midtown Motel	40
Motol 6	59
O'Haire Motor Inn	72
Staybridge Suites	113
Super 8 Lodge	112
The Quality Inn	104
Townhouse Inns	109
Triple Crown Motor Inn	<u>50</u>
Total	<u>2,114</u>

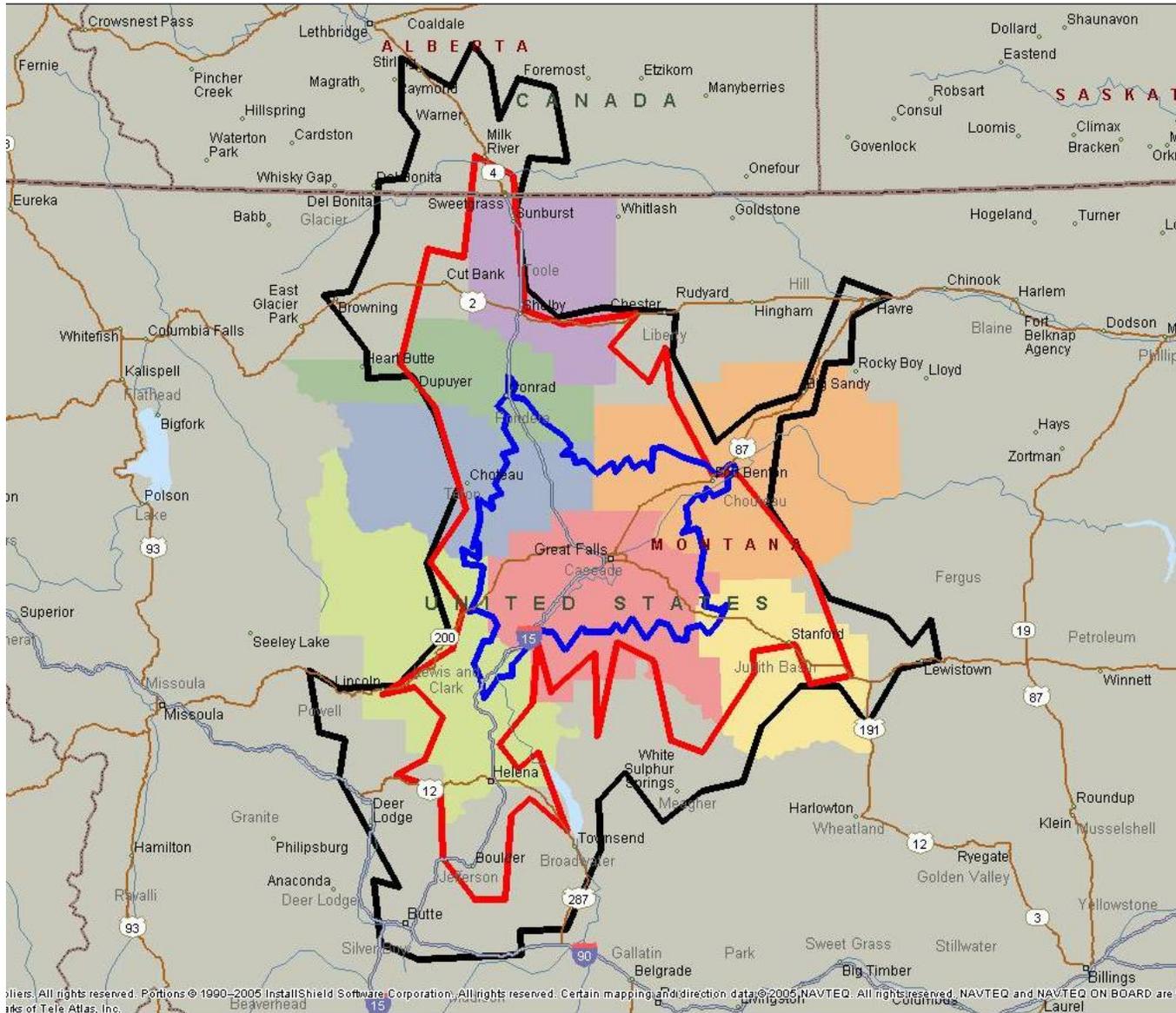
Montana ExpoPark in Relation to Restaurants



Montana ExpoPark in Relation to Larger Shopping Centers



Primary and Secondary Markets and Drive Times
60 Minutes, 120 Minutes and 150 Minutes



Community Resources and Cultural Attractions

The Great Falls/Cascade area has a variety of community resources and cultural attractions that play a role in the visitor industry of which ExpoPark is a part. Community resources include recreational activities, higher education and major economic attractors. Cultural attractions include museums, theaters and other similar amenities. Below is a listing of some of the principal community resources and cultural attractions in the Great Falls area.

Community Resources

- The Great Falls area has different 18-hole golf courses, including 3 that are open to the public
- Centene Stadium, home of the Great Falls Voyagers minor league baseball team
- Electric City Speedway, a motor sports facility
- River's Edge Trail, a 44 mile walking and bike trail along the Missouri River
- Electric City Water Park and other pools
- Community Recreation Center
- Montana State University – Great Falls College of Technology, a two-year accredited school
- University of Great Falls, an 800-student private, Roman Catholic liberal arts college
- Malmstrom Air Force Base – an active base with about 3,200 military employees and 600 civilian workers.

Cultural Attractions

- Russell Museum, a 76,000 sq. ft. museum with collections of works by CM Russell
- Lewis & Clark Interpretive Center, a year-round center overlooking the Missouri River
- Cascade County Historical Museum
- Malmstrom Air Force Base Museum
- Children's Museum
- Great Falls Symphony, performing throughout the year
- Mansfield Center for the Performing Arts

Aerial View of Montana ExpoPark



Site Location Assessment Summary

- Great Falls is accessible from major population areas within Montana and southern Alberta, Canada within a 1 to 4 hour window.
- Multiple Interstate and highway systems connect the Great Falls area from all directions.
- ExpoPark is centrally located within the Great Falls area and is easily accessed via city streets from all directions.
- The grounds enjoy high visibility from city streets surrounding the property.
- ExpoPark is in close proximity to lodging facility, restaurants and shopping areas.

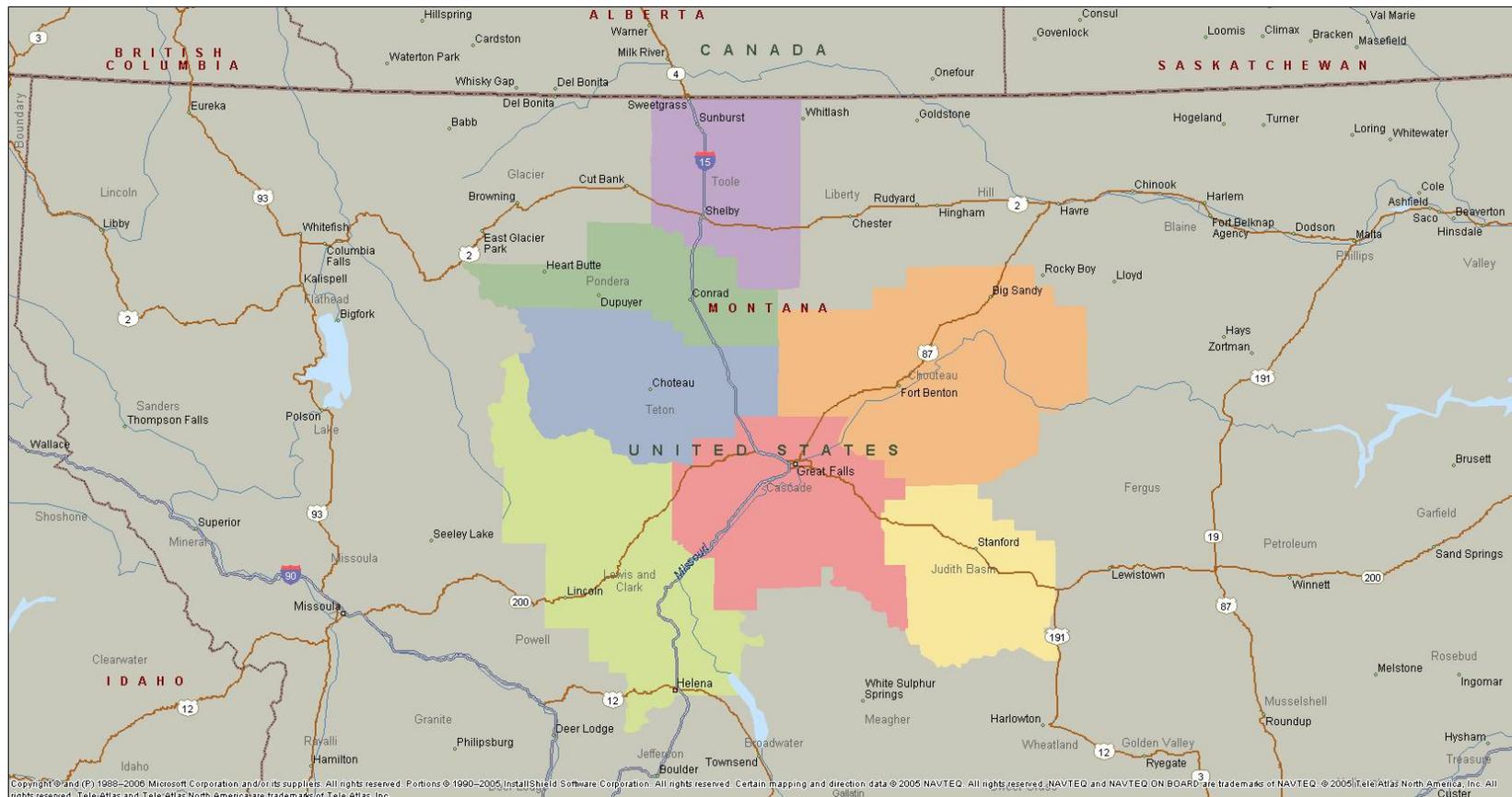
POPULATION AND ECONOMIC TRENDS

A number of demographic and economic trends were researched and assessed as to their potential impact on the demand for event facilities at Montana ExpoPark, including population trends, household characteristics and economic trends.

POPULATION TRENDS

Based on the drive time analysis (page 8), we identified Cascade County as the Primary Market and the Counties of Chouteau, Judith Basin, Lewis and Clark (to a lesser degree), Pondera, Teton and Toole as the Secondary Market, as shown in the following map.

Primary and Secondary Markets



The table below shows the historical and projected populations of the Primary and Secondary Market counties related to Montana ExpoPark’s market area. It should be noted that while Lewis & Clark County is included in the table, it has its own retail trade area.

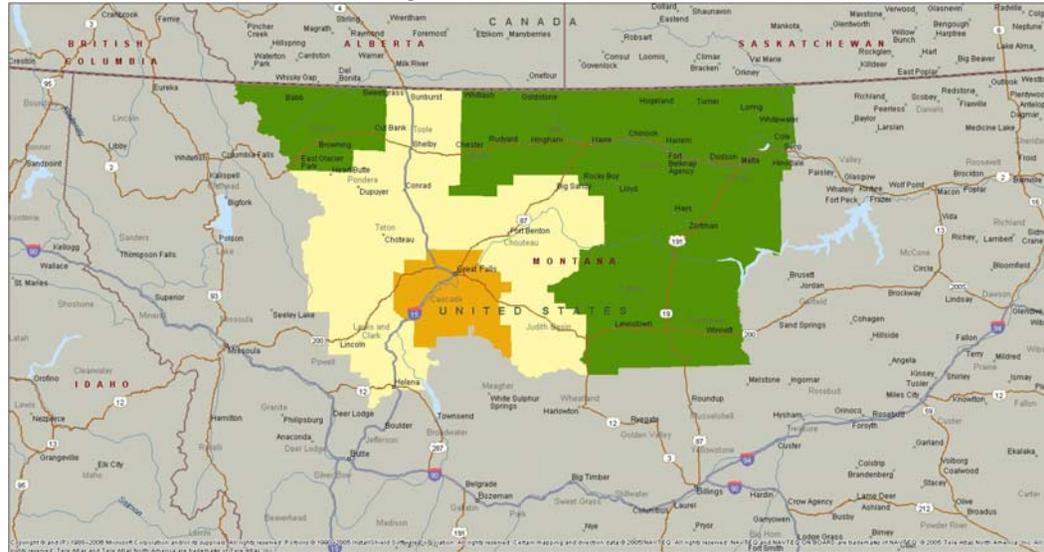
Montana ExpoPark Historical and Projected Population, 1990 to 2030						
Market Area	1990	2000	2007	2010	2020	2030
<u>Primary Market</u>						
Cascade County	77,690	80,357	81,775	80,640	76,660	76,720
<u>Secondary Market</u>						
Chouteau County	5,453	5,970	5,254	5,110	4,770	4,620
Judith Basin County	2,282	2,329	2,048	1,980	1,910	1,890
Lewis & Clark County	47,494	55,716	59,998	63,050	72,540	82,020
Pondera County	6,433	6,424	5,943	5,810	5,440	5,280
Teton County	6,271	6,445	6,023	5,920	5,720	5,640
Toole County	<u>5,046</u>	<u>5,267</u>	<u>5,144</u>	<u>5,030</u>	<u>4,740</u>	<u>4,640</u>
Total Secondary Market	<u>72,979</u>	<u>82,151</u>	<u>84,410</u>	<u>86,900</u>	<u>95,120</u>	<u>104,090</u>
Total Market Area	<u>150,669</u>	<u>162,508</u>	<u>166,185</u>	<u>167,540</u>	<u>171,780</u>	<u>180,810</u>
State of Montana	<u>799,065</u>	<u>902,195</u>	<u>957,861</u>	<u>985,930</u>	<u>1,078,460</u>	<u>1,182,440</u>

Source: U.S. Census Bureau, State of Montana

Excluding Lewis & Clark County from the above table, the overall population for the Primary and Secondary market area, in 2010, is estimated at about 104,490, declining to 98,790 by 2030. Without Lewis & Clark County in the analysis, ExpoPark’s market area is a declining population.

Even when expanding the market area to that of the Regional Trade area for Great Falls, per the Great Falls Economic Development Authority, this market area represents a declining and aging population, as shown on the next page.

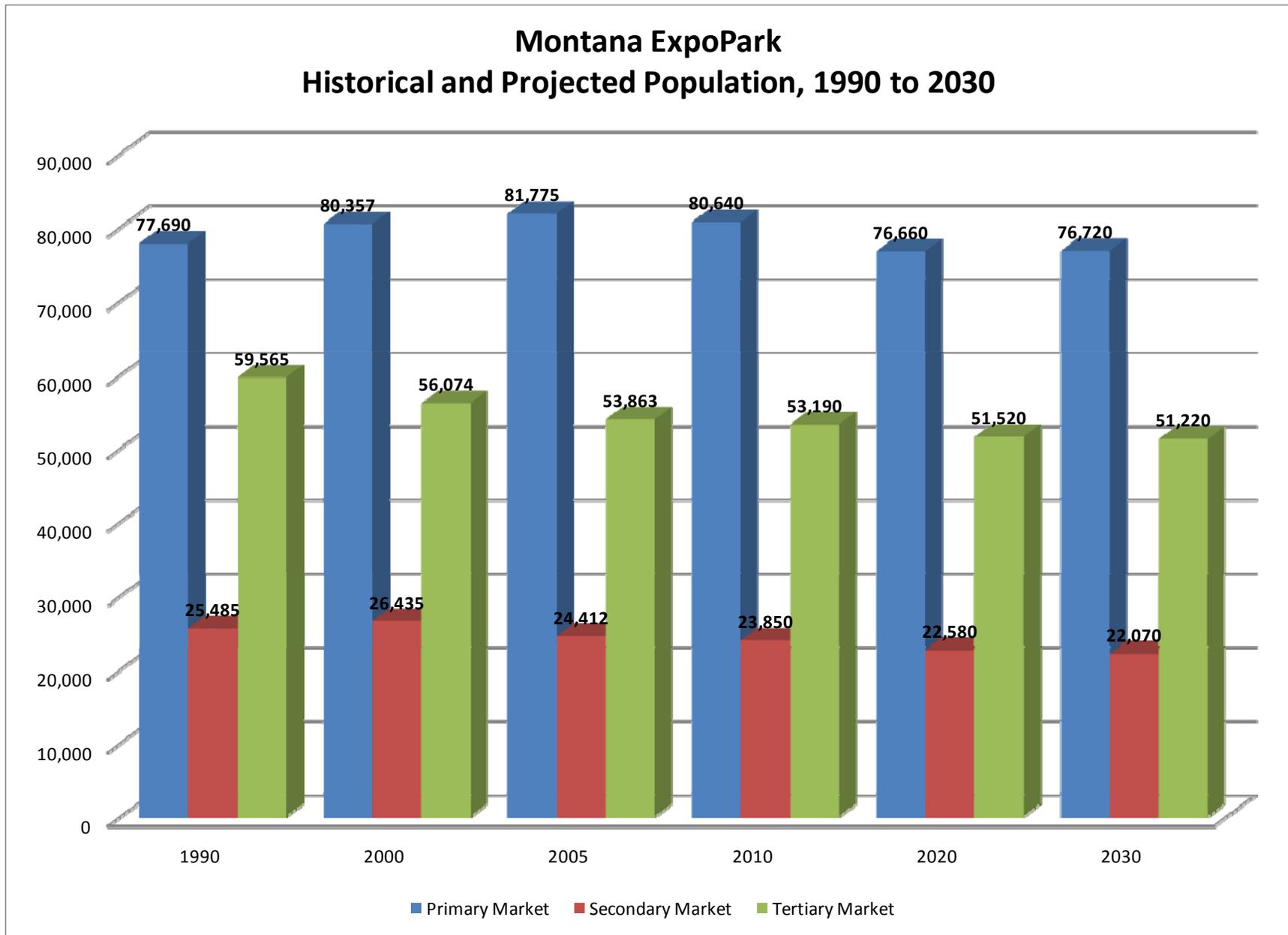
Larger Retail Trade Market

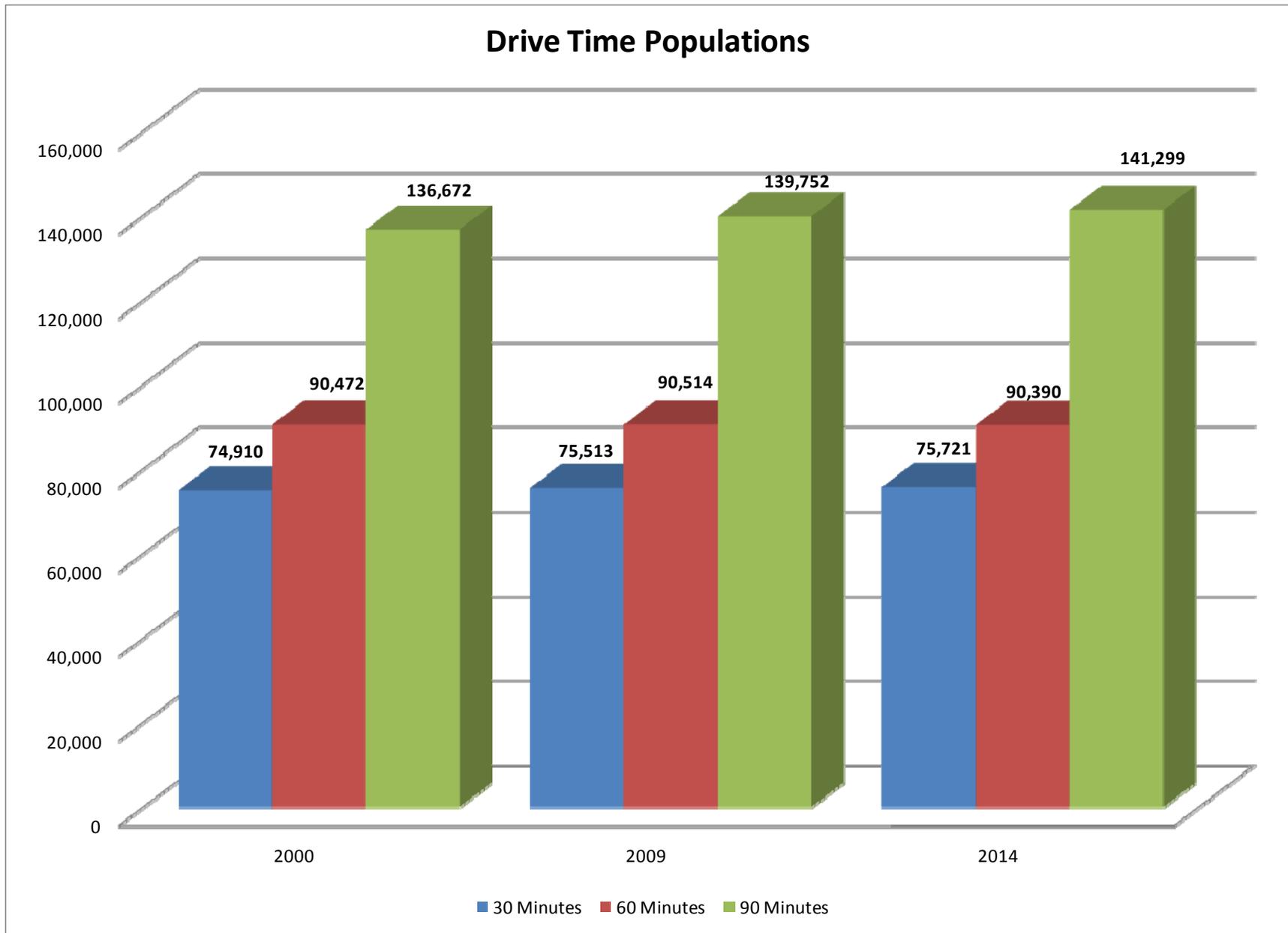


Historical and Prospective Population Trends, Without Lewis and Clark County

Montana ExpoPark Historical and Projected Population, 1990 to 2030						
Market Area	1990	2000	2007	2010	2020	2030
Primary Market						
Cascade County	77,690	80,357	81,775	80,640	76,660	76,720
Secondary Market						
Chouteau County	5,453	5,970	5,254	5,110	4,770	4,620
Judith Basin County	2,282	2,329	2,048	1,980	1,910	1,890
Pondera County	6,433	6,424	5,943	5,810	5,440	5,280
Teton County	6,271	6,445	6,023	5,920	5,720	5,640
Toole County	<u>5,046</u>	<u>5,267</u>	<u>5,144</u>	<u>5,030</u>	<u>4,740</u>	<u>4,640</u>
Total Secondary Market	<u>25,485</u>	<u>26,435</u>	<u>24,412</u>	<u>23,850</u>	<u>22,580</u>	<u>22,070</u>
Tertiary Market						
Blain County	9,728	7,009	6,550	6,430	6,180	6,130
Fergus County	12,083	11,893	11,181	11,060	10,810	10,910
Glacier County	12,122	13,247	13,382	13,450	13,560	13,710
Hill County	17,655	16,673	16,568	16,260	15,480	15,200
Liberty County	2,295	2,158	1,796	1,760	1,630	1,550
Petroleum County	519	493	438	400	370	370
Phillips County	<u>5,163</u>	<u>4,601</u>	<u>3,948</u>	<u>3,830</u>	<u>3,490</u>	<u>3,350</u>
Total Tertiary Market	<u>59,565</u>	<u>56,074</u>	<u>53,863</u>	<u>53,190</u>	<u>51,520</u>	<u>51,220</u>
Total Market Area	<u>162,740</u>	<u>162,866</u>	<u>160,050</u>	<u>157,680</u>	<u>150,760</u>	<u>150,010</u>
State of Montana	<u>799,065</u>	<u>902,195</u>	<u>957,861</u>	<u>985,930</u>	<u>1,078,460</u>	<u>1,182,440</u>

Source: U.S. Census Bureau, State of Montana

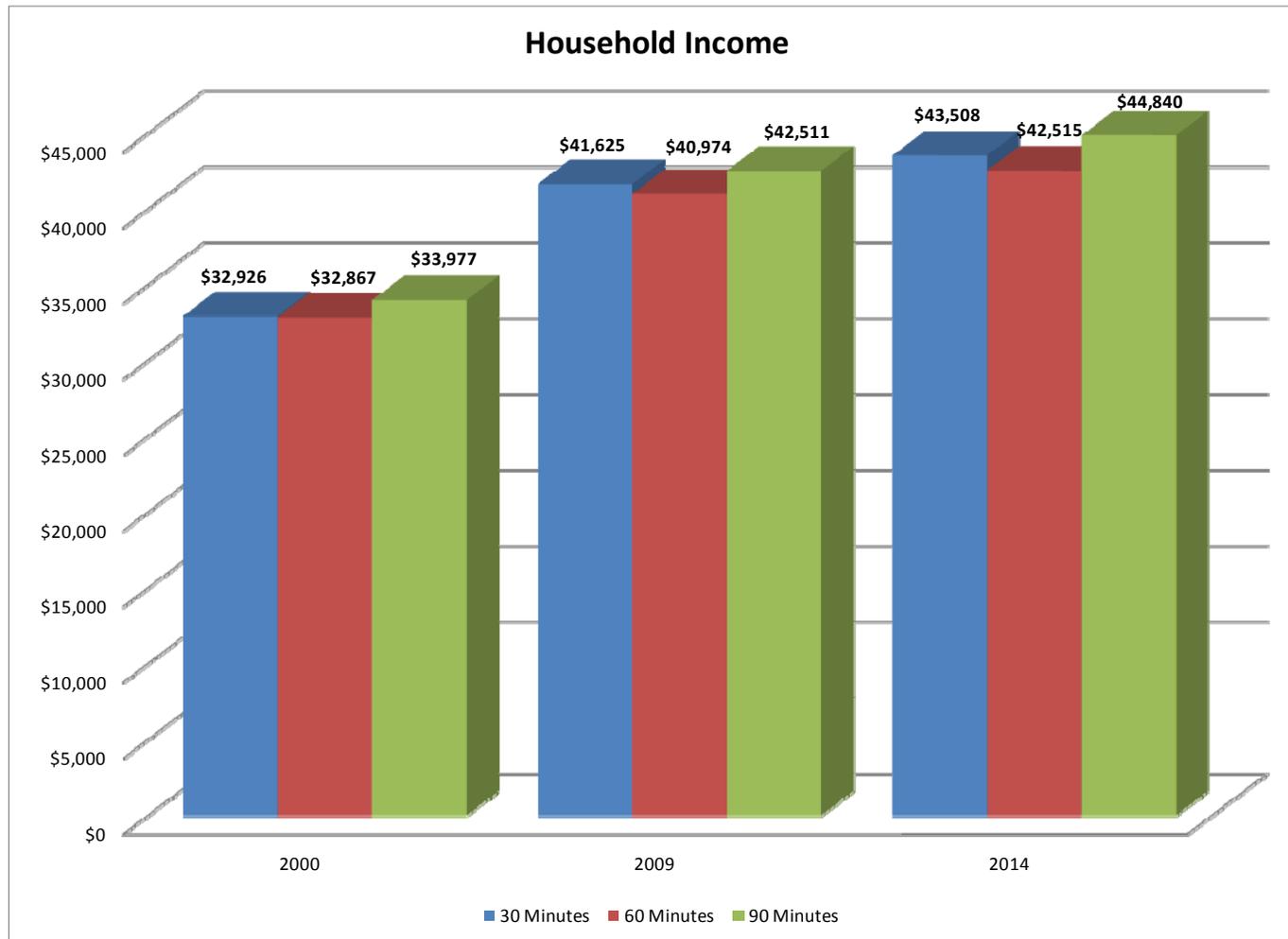




HOUSEHOLD CHARACTERISTICS

Based on data compiled by Claritas, Inc., in 2008, the ACFRP has access to significant household numbers:

- 30,850 households within 30 minute drive of ExpoPark – 75,500 people
- 36,900 households within 60 minute drive of ExpoPark – 90,500 people
- 58,500 households within 90 minute drive of ExpoPark – 139,700 people

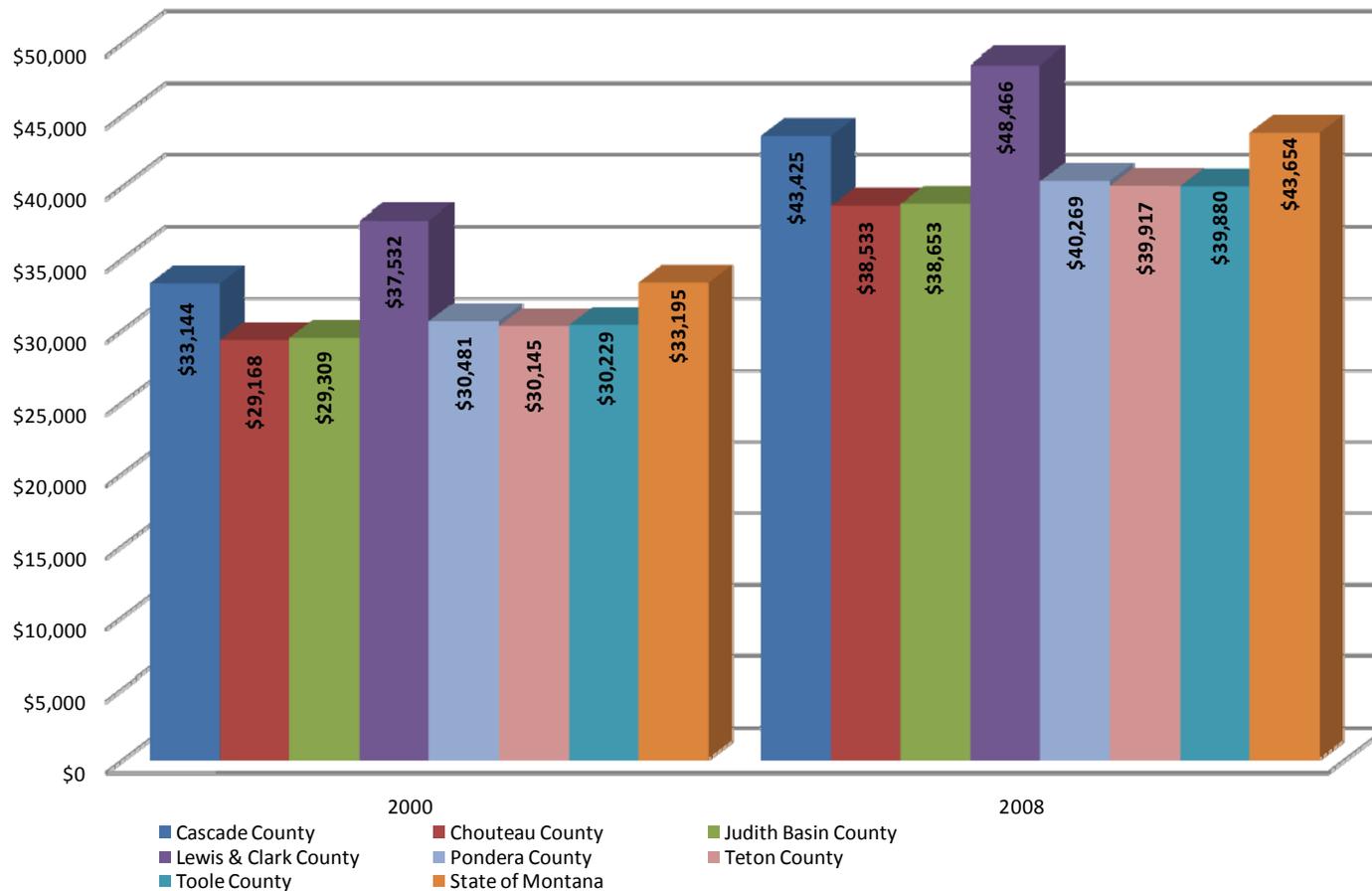


ECONOMIC TRENDS

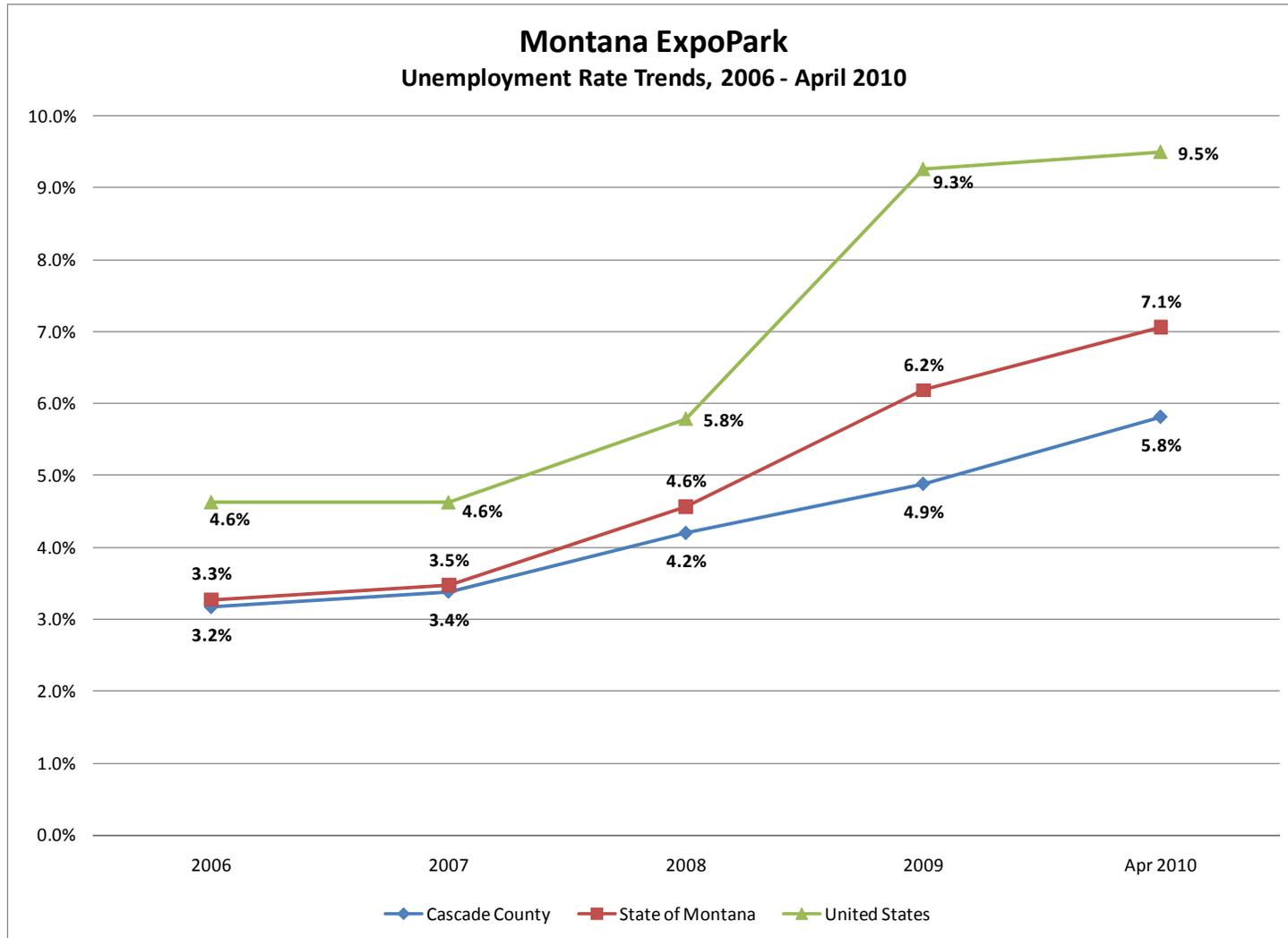
A number of economic trends were noted for Cascade County that affect the discretionary spending and demand for event facilities:

Median incomes of Cascade County households, as well as those in the secondary market area, are below the State average and the averages for other major Montana MSA's.

Montana ExpoPark
Median Household Income Trends, 2000 and 2008



Unemployment rates in Cascade County have been significantly below those of the State of Montana and the United States national average for the past 5 years.



DEMOGRAPHIC AND ECONOMIC SUMMARY

- Flat to declining population in Cascade County and Secondary Market counties will limit the future demand for events and activities that use multi-use event space like ExpoPark.
- The aging population of the market area will limit the types of events and activities demand by the local residents.
- Even with the recession of 2008-2009, the overall employment in Cascade County has remained far below the national average, as well as below the average in Montana.
- These two factors will limit demand for events and activities by local residents, requiring ExpoPark to position itself more and more as a destination event facility.

USAGE TRENDS

USAGE BY EVENT TYPE

We analyzed the types of events and related use days for the existing Fairground facilities for the fiscal years 2008 to 2010. . Below is a summary of events, by type, for fiscal years 2008, 2009 and 2010 (excluding the Fair).

Montana ExpoPark Number of Events by Type, FY 2008-2010			
Event Type	2008	2009	2010
Animal Show	4	1	2
Banquet/Reception	52	48	46
Convention/Conference	0	3	0
Car Show	7	5	9
Concert	8	5	4
Dance	5	3	3
Government Use	11	4	8
Horse Show	6	5	5
Livestock Shows	6	6	5
Meeting	14	14	14
Other	35	29	34
Picnic	12	15	7
Public Show	20	25	28
RV Rally	1	0	0
Sales and Auction	3	5	4
Spectator Event	6	8	5
Sporting Event	19	5	10
Training	8	14	15
Trade Show	4	2	0
Total	221	197	199

Source: Montana Expo Park

Montana ExpoPark Number of Event Days by Type, FY 2008-2010			
Event Type	2008	2009	2010
Animal Show	7	2	5
Banquet/Reception	54	58	51
Convention/Conference	0	12	0
Car Show	9	7	13
Concert	9	5	4
Dance	7	3	5
Government Use	19	5	14
Horse Show	19	12	11
Livestock Shows	8	7	6
Meeting	33	17	15
Other	94	88	81
Picnic	12	15	7
Public Show	52	57	63
RV Rally	4	0	0
Sales and Auction	34	43	30
Spectator Event	10	22	18
Sporting Event	68	52	58
Training	17	19	26
Trade Show	5	4	0
Total	461	428	407

Source: Montana Expo Park

USAGE BY MONTH

The table below shows the breakdown of usage by month for the fiscal years 2008, 2009 and 2010.

Montana ExpoPark Event Usage, FY 2008 - 2010						
Month	2008		2009		2010	
	Number of Events	Number of Event Days	Number of Events	Number of Event Days	Number of Events	Number of Event Days
July	3.6%	6.1%	4.1%	3.0%	5.0%	2.7%
August	7.2%	6.1%	9.6%	8.9%	6.5%	7.1%
September	14.0%	11.7%	13.7%	9.8%	18.6%	14.7%
October	6.8%	8.7%	11.7%	7.9%	11.1%	11.3%
November	4.1%	10.4%	5.1%	4.4%	8.0%	5.4%
December	9.0%	5.0%	8.6%	13.3%	7.5%	9.8%
January	7.2%	8.0%	6.6%	8.2%	5.5%	6.4%
February	5.9%	11.5%	4.6%	11.0%	4.5%	11.1%
March	7.7%	8.2%	6.6%	6.8%	7.5%	10.6%
April	10.9%	7.6%	9.1%	7.9%	7.0%	7.4%
May	14.0%	10.0%	9.6%	5.6%	11.6%	8.1%
June	<u>9.5%</u>	<u>6.7%</u>	<u>10.7%</u>	<u>13.1%</u>	<u>7.0%</u>	<u>5.4%</u>
Total	<u>100.0%</u>	<u>100.0%</u>	<u>100.0%</u>	<u>100.0%</u>	<u>100.0%</u>	<u>100.0%</u>

Source: Montana ExpoPark

USAGE BY BUILDING/SPACE

The table below shows the number of events that used various buildings, structures or spaces in fiscal years 2008 to 2010.

	Montana ExpoPark Number of Events by Building/Area Used				Montana ExpoPark Percentage of Events by Building/Area Used		
	2008	2009	2010		2008	2009	2010
Four Seasons Arena	35	27	26	Four Seasons Arena	15.0%	12.9%	12.4%
Exhibition Hall	31	24	28	Exhibition Hall	13.3%	11.5%	13.3%
Livestock Pavilion	15	14	13	Livestock Pavilion	6.4%	6.7%	6.2%
Trades & Industries	29	22	28	Trades & Industries	12.4%	10.5%	13.3%
Family Living Center	43	45	40	Family Living Center	18.5%	21.5%	19.0%
Lottery Club	21	12	8	Lottery Club	9.0%	5.7%	3.8%
Atrium	5	5	4	Atrium	2.1%	2.4%	1.9%
Paddock Club	9	16	20	Paddock Club	3.9%	7.7%	9.5%
Fine Arts	4	7	8	Fine Arts	1.7%	3.3%	3.8%
Beef Barn	3	1	0	Beef Barn	1.3%	0.5%	0.0%
Central Park	15	15	13	Central Park	6.4%	7.2%	6.2%
Parking Lot	8	6	9	Parking Lot	3.4%	2.9%	4.3%
Merchantile Building	7	7	7	Merchantile Building	3.0%	3.3%	3.3%
Heritage Building	5	4	1	Heritage Building	2.1%	1.9%	0.5%
Grandstand	1	1	0	Grandstand	0.4%	0.5%	0.0%
Poultry Barn	2	2	2	Poultry Barn	0.9%	1.0%	1.0%
FFA Building	0	1	3	FFA Building	0.0%	0.5%	1.4%
	<u>233</u>	<u>209</u>	<u>210</u>		<u>100.0%</u>	<u>100.0%</u>	<u>100.0%</u>

As shown in the above table, the Family Living Center has been the most used building/area over the past 3 fiscal years, followed by the Trades and Industries Building and Exhibition Hall and the Four Seasons Arena.

The table below shows the number of event days, by building/space, for the fiscal years 2008 to 2010.

Montana ExpoPark Number of Events by Building/Area Used				Montana ExpoPark Percentage of Events by Building/Area Used			
	2008	2009	2010		2008	2009	2010
Four Seasons Arena	61	64	64	Four Seasons Arena	12.4%	13.5%	13.2%
Exhibition Hall	55	60	53	Exhibition Hall	11.2%	12.6%	11.0%
Livestock Pavilion	35	28	26	Livestock Pavilion	7.1%	5.9%	5.4%
Trades & Industries	87	74	83	Trades & Industries	17.6%	15.6%	17.1%
Family Living Center	70	69	62	Family Living Center	14.2%	14.5%	12.8%
Lottery Club	29	15	8	Lottery Club	5.9%	3.2%	1.7%
Atrium	8	18	11	Atrium	1.6%	3.8%	2.3%
Paddock Club	11	20	29	Paddock Club	2.2%	4.2%	6.0%
Fine Arts	6	18	56	Fine Arts	1.2%	3.8%	11.6%
Beef Barn	46	31	0	Beef Barn	9.3%	6.5%	0.0%
Central Park	19	17	14	Central Park	3.9%	3.6%	2.9%
Parking Lot	16	6	11	Parking Lot	3.2%	1.3%	2.3%
Merchantile Building	30	13	14	Merchantile Building	6.1%	2.7%	2.9%
Heritage Building	16	38	5	Heritage Building	3.2%	8.0%	1.0%
Grandstand	1	1	0	Grandstand	0.2%	0.2%	0.0%
Poultry Barn	3	2	2	Poultry Barn	0.6%	0.4%	0.4%
FFA Building	0	1	46	FFA Building	0.0%	0.2%	9.5%
	<u>493</u>	<u>475</u>	<u>484</u>		<u>100.0%</u>	<u>100.0%</u>	<u>100.0%</u>

Based on number of use days, the Trades and Industries Building has been used the most of all buildings, followed by the Family Living Center, Four Season Arena and Exhibition Hall. Indoor soccer practices during the winter months account for the high number of use days in the Trades and Industries Building.

Facility Usage and Assessment Summary

- Four Seasons Arena and Exhibition Hall are the newest facilities, yet lack key attributes to be truly functional as a multi-use arena facility and exhibition hall.
- Multi-use of buildings on the grounds requires movement over longer distances. For example, a large event that uses the Four Season, Exhibition Hall and Trades and Industries Building needs to move people outside between the Trades and Industries and Exhibition Hall.
- There are facilities with full climate controls (Four Season, Exhibition Hall, Atrium, Paddock Club), as well as facilities with limited climate controls (Trades and Industries, Fine Arts, Family Living, Livestock Pavilion).
- The horse race track and backside barns represent about 1/3 of the ExpoPark property, yet are only used for 6 days of horse racing (2010) and training. Management reports a net loss from this section of ExpoPark.
- POPULOUS has prepared a summary of its physical inspection of the facilities and structures of ExpoPark, attached as Exhibit A to this summary report.

COMPETITIVE FACTORS

PRINCIPAL COMPETITIVE FACILITIES

- Local Event Facilities
- Regional Arenas
- Regional Horse Show Facilities

LOCAL EVENT FACILITIES

Local event facilities include other larger facilities that host similar events and activities to those held at ExpoPark. They facilities are categorized as Trade Show and Banquet facilities and RV facilities. Trade Show and Banquet Facilities include the Mansfield Convention Center and Best Western Heritage Inn. Below are two tables that present a comparison of these facilities with similar facilities at ExpoPark.

Montana ExpoPark Local Exhibition Facilities								
Facility	Square Ft	Dimensions	Booths	Climate Controlled	Daily Rate	Rate Per Square Foot	Concession Areas	Kitchen Type
<u>Montana ExpoPark</u>								
Exhibition Hall	15,000	150 x 100	90	Yes	\$950	\$0.063	Yes	None
Four Seasons Arena	53,000	222 x 141	300	Yes	\$3,000	\$0.057	Yes	None
Heritage Building	14,700	150 x 98	N/A	No	\$350	\$0.024	No	None
Trades and Industries	16,000	200 x 80	95	Yes	\$675	\$0.042	No	None
Paddock Club Side 1	2,926	77 x 38	N/A	Yes	\$200	\$0.068	Yes	None
Paddock Club Side 2	1,739	47 x 37	N/A	Yes	\$275	\$0.158	Yes	None
<u>Mansfield Convention Center</u>								
Mansfield Convention Center	15,300	153 x 100	92	Yes	\$1,275 - \$1,820	\$0.083 to \$.119	No	Catering
<u>Best Western Heritage Inn</u>								
Convention Room	12,000	N/A	70	Yes	\$1,000	\$0.083	No	On Property
International Room	3,500	N/A	N/A	Yes	\$450	\$0.129	No	On Property

Local RV Parks in Great Falls Area

Map Key	RV Park Name	Location	Ownership	RV Spaces	Hook-Ups	Amps	Rates	Cable TV	Dump Station	Internet	Laundry	Playground	Pool	Rest Rooms	Showers
1	Dicks RV Park	Great Falls, MT	Private	150	F/WE/E	50	\$32	X	X	X	X			X	X
2	Great Falls KOA	Great Falls, MT	Private	178	F/WE/E	50	\$67		X	X	X	X	X	X	X

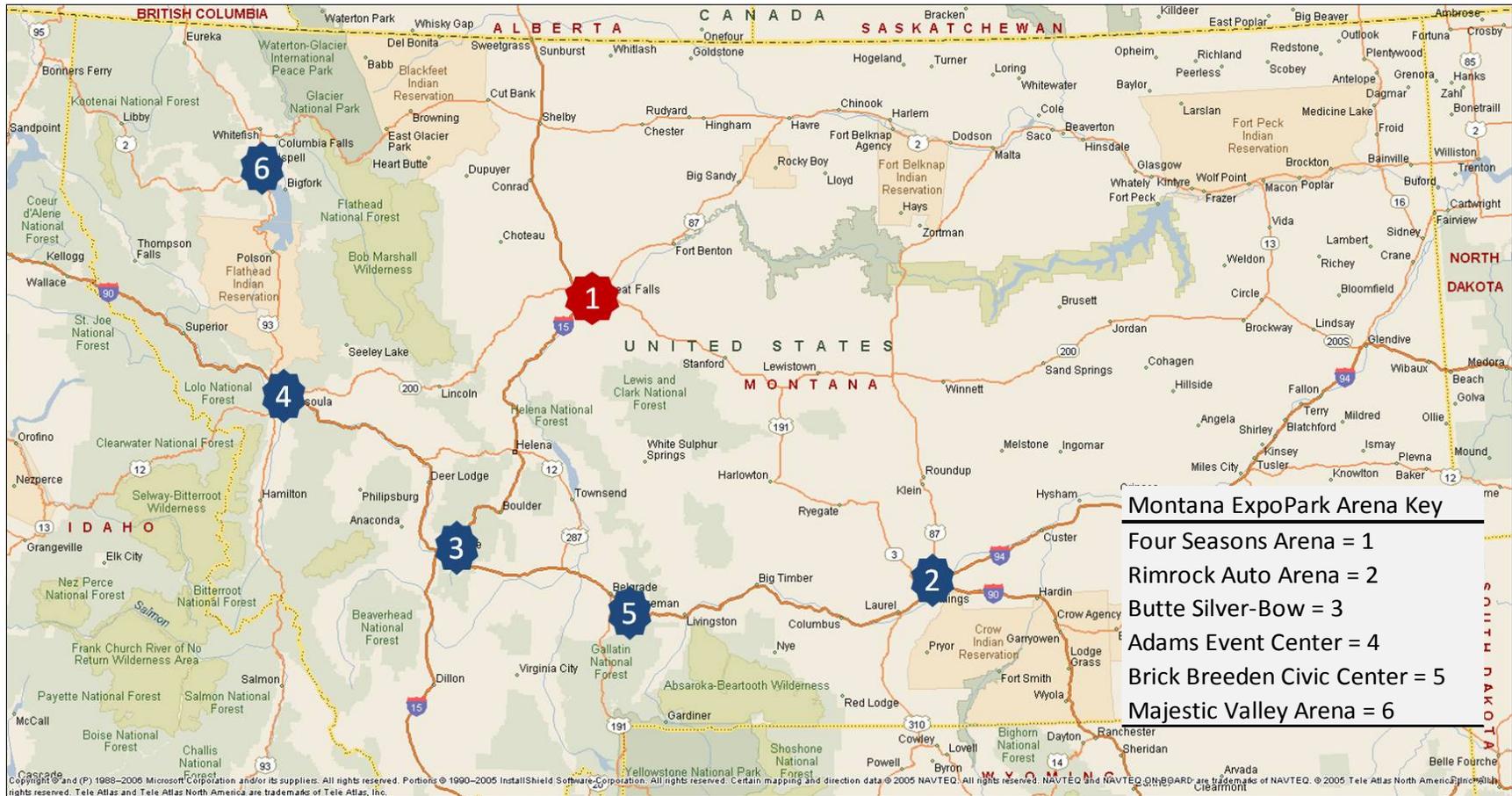
Hook-Ups F = Full, WE = Water and Electric, E = Electric

COMPETITIVE ARENAS

We researched and compared a number of other arenas in Montana with the Four Season Arena, as presented in the following table.

Montana ExpoPark Comparison of Arena Facilities in Regional Market Area						
	4 Seasons Arena	Rimrock Auto Arena	Butte-Silver Bow Civic Center	Adams Center	Brick Breeden Fieldhouse	Majestic Valley Arena
Location	Great Falls, MT	Billings, MT	Butte, MT	Missoula, MT	Bozeman, MT	Kalispell, MT
Arena Floor Size	141 x 222	85 x 200	19,623 Sq. Ft.	97 x 148	162 x 300	130 x 300
Permanent Seats	5,434	8,700	3,500	7,500	5,000	4,500
Concert Seats	6,164	10,782	7,000	5,500-7,500	8,617	7,000
Basketball Seats	5,434	10,500	6,250	7,500	7,250	N/A
Base Pricing	\$3,000	\$3,000	\$2,000	\$2,500	\$2,500	\$2,000
Major Tenant	N/A	Billings Outlaws	N/A	Grizzlies	Montana State University Bobcats	N/A
Size of MSA	<u>82,000</u>	<u>154,500</u>	<u>32,949</u>	<u>108,623</u>	<u>90,343</u>	<u>83,624</u>
Number of Seats per person in MSA	<u>15.1</u>	<u>17.8</u>	<u>9.4</u>	<u>14.5</u>	<u>18.1</u>	<u>18.6</u>

A map showing the location of these arenas is presented below.



COMPARABLE ARENA MARKETS

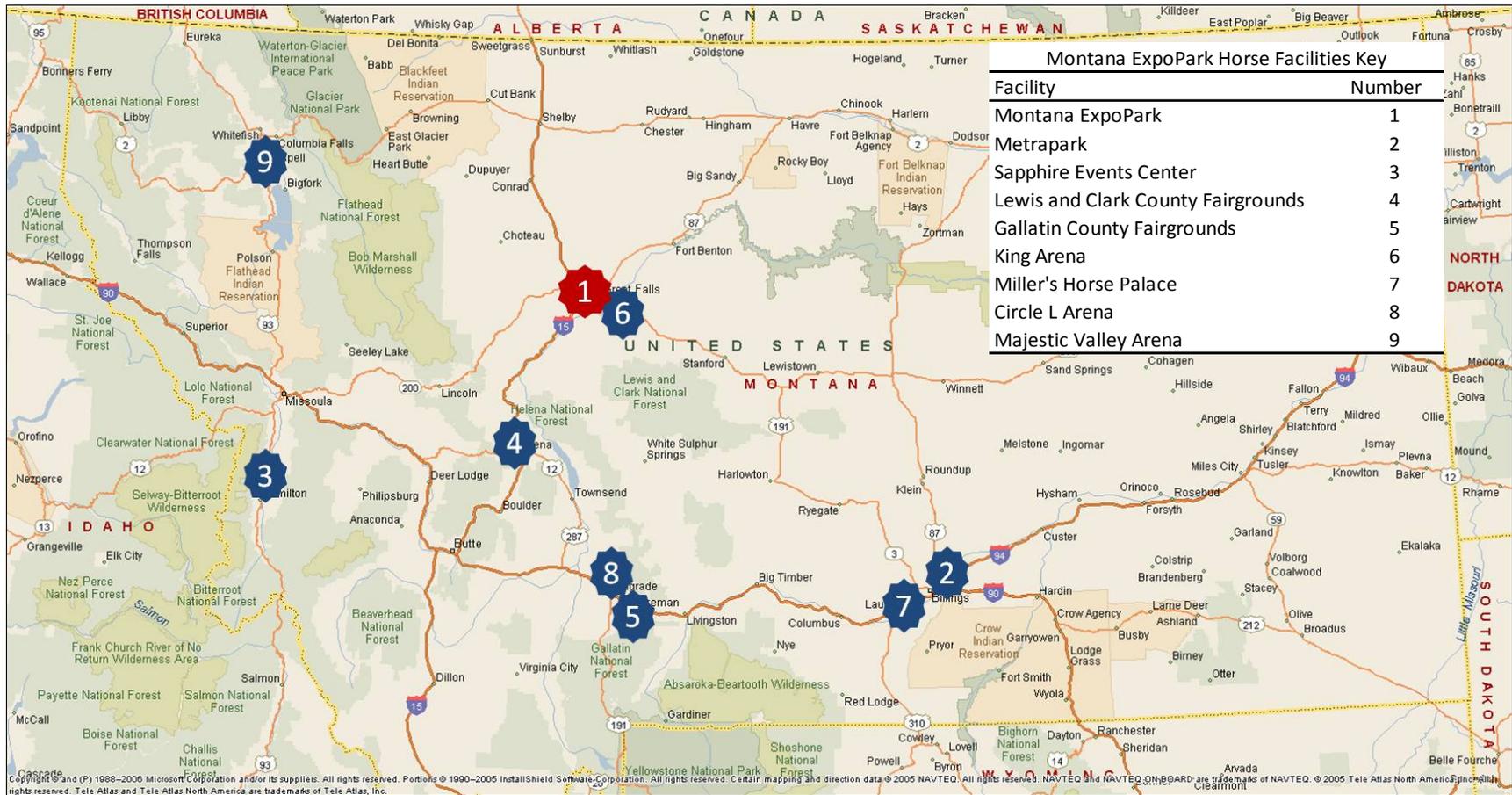
To assist in evaluating the general market support for any improvements/expansion of the Four Seasons Arena, we analyzed the number of arenas, number of concert seats and the average concert/spectator event ticket sales in comparable markets, based on relative MSA populations. The table below shows how the Great Falls market area compares with 14 other market areas (7 larger and 7 smaller than the Great Falls MSA).

Montana ExpoPark
Comparison of Arenas in Similar Markets

Metro Statistical Area	2009 Population	Arena/Civic Center	Number of Seats	Major Tenant
Dubuque, IA	93,072	Five Flags Center	4,800	None
Palm Coast, FL	91,622	None	N/A	N/A
Pocatello, ID	90,273	Holt Arena	8,000	Idaho State Bengals (NCAA)
Cheyenne, WY	88,854	Taco John's Event Center	2,100	None
Elmira, NY	88,331	First Arena	3,784	Elmira Jackals (ECHL)
Ames, IA	87,214	James Hilton Coliseum	14,356	Iowa State Cyclones (NCAA)
Corvallis, OR	82,605	Gill Coliseum	10,400	Oregon State Beavers (NCAA)
Great Falls, MT	82,178	Four Seasons Arena	6,164	None
Danville, IL	80,067	David S Palmer Arena	2,350	Eastern Illinois University (NCAA)
Sandusky, OH	76,963	None	N/A	N/A
Columbus, IN	76,063	None	N/A	N/A
Casper, WY	74,508	Casper Events Center	7,500	None
Hinesville-Fort Stewart, GA	74,420	None	N/A	N/A
Lewiston, ID-WA	60,643	None	N/A	N/A
Carson City, NV	55,176	None	N/A	N/A

HORSE SHOW FACILITIES

Below is a map showing the location of other principal horse show facilities that are competitive with facilities at ExpoPark.



The table below presents a comparison of the various aspects of the equestrian show facilities that are considered competitive with ExpoPark.

Facility Description	Majestic Valley Arena Kalispell, MT	Metrapark Billings, MT	Sapphire Event Center Corvallis, MT	Lewis and Clark County Fairgrounds Helena, MT	Gallatin County Fairgrounds Bozeman, MT	King Arena Great Falls, MT	Miller's Horse Palace Laurel, MT	Circle L Arena Belgrade, MT
<u>Indoor arena</u>	1	1	1	1	1	1	1	1
Daily rate	\$2,000	\$3,000	\$600	\$258 w/o spectators \$464 to \$670 with spectators	\$401 per day \$34 per hour	N/A	\$500	\$450
Indoor ring size	130 x 300	120 x 230	160 x 300	120 x 200	60 x 174	110 x 265	93 x 192	80 x 200
Floor surface	Dirt	Concrete	mostly sand	Dirt	Dirt over concrete	Dirt	Dirt	Dirt
Seating capacity	7000	up to 12,000	200	1,000	1,200	N/A	200	Minimal
Concession stands	Yes	Yes	hired staff	No	Yes	Yes	Yes	Yes
Heated	Yes	Yes	No	Yes	Yes	No	Yes	Yes
Air conditioning	None	Yes	No	No	Yes	No	None	No
<u>Covered arena</u>	None	Yes	None	None	None	None	None	None
Daily rate	N/A	N/A	N/A	N/A	N/A	N/A	N/A	N/A
Ring size	N/A	N/A	N/A	N/A	N/A	N/A	N/A	N/A
Seating capacity	N/A	200	N/A	N/A	N/A	N/A	N/A	N/A
Concession stands	N/A	No	N/A	N/A	N/A	N/A	N/A	N/A
<u>Additional arena</u>	None	None	None	None	None	None	None	None
Daily rate	N/A	N/A	N/A	N/A	N/A	N/A	N/A	N/A
Ring size	N/A	N/A	N/A	N/A	N/A	N/A	N/A	N/A
Seating capacity	N/A	N/A	N/A	N/A	N/A	N/A	N/A	N/A
Concession stands	N/A	N/A	N/A	N/A	N/A	N/A	N/A	N/A
<u>Outdoor arena</u>	1	None	Yes	Yes	1	1	1	1
Daily rate	500	N/A	\$600	\$257+	\$357 w/o lights	N/A	\$250	350
Ring size	150 x 300	N/A	140 x 270	200 x 300	150 x 300	150 x 320	120 x 192	135 x 300
Seating capacity	none	N/A	300+	4600	1500	N/A	200	None
Concession stands	Set up only	N/A	hired	Yes	No	N/A	Yes	Yes
<u>Stalls</u>	Yes	Yes	Yes	Yes	Yes	Yes	Yes	Yes
Daily rate	\$20	N/A	\$30	\$15	\$15	N/A	N/A	\$25 to \$30
Enclosed stalls	164 indoor-190 outdoor	N/A	93	200+	110	80	24	6
Portable stalls	190	N/A	N/A	N/A	N/A	N/A	N/A	25
Stall size	12 x 12	N/A	10 x 10	10 x 10	8 x 10	N/A	12 x 12	12 x 12 and 12 x 14
<u>Warm Up Ring</u>	Yes	None	None	None	1	None	None	None
Number	2	N/A	N/A	N/A	240 x 360	N/A	N/A	N/A
Daily rate	N/A	N/A	N/A	N/A	\$175	N/A	N/A	N/A
<u>RV Facilities</u>	Yes	Yes	Yes	Yes	Yes	None	None	Yes
How many	50	50	20	21	37+	N/A	N/A	
Cost	\$20	\$20	\$15	\$20	\$24 per night	N/A	N/A	\$10
Type of Hook-ups	W/E	W/E	E	Electricity	Full and Dry	N/A	N/A	
Notes								Both arenas can be rented for \$650 per day.

HORSE SHOW RESTRICTIONS

Each type of horse show is governed by a sanctioning body. The two major sanctioning bodies are the United States Equestrian Federation (USEF) and the American Quarter Horse Association (AQHA). Competitions governed by the USEF include dressage, driving, endurance riding, eventing, hunt seat equitation, hunter, jumper, reining, roadster, saddle seat equitation, vaulting, and western riding competition including equitation, western pleasure, reining, trail, and related events.

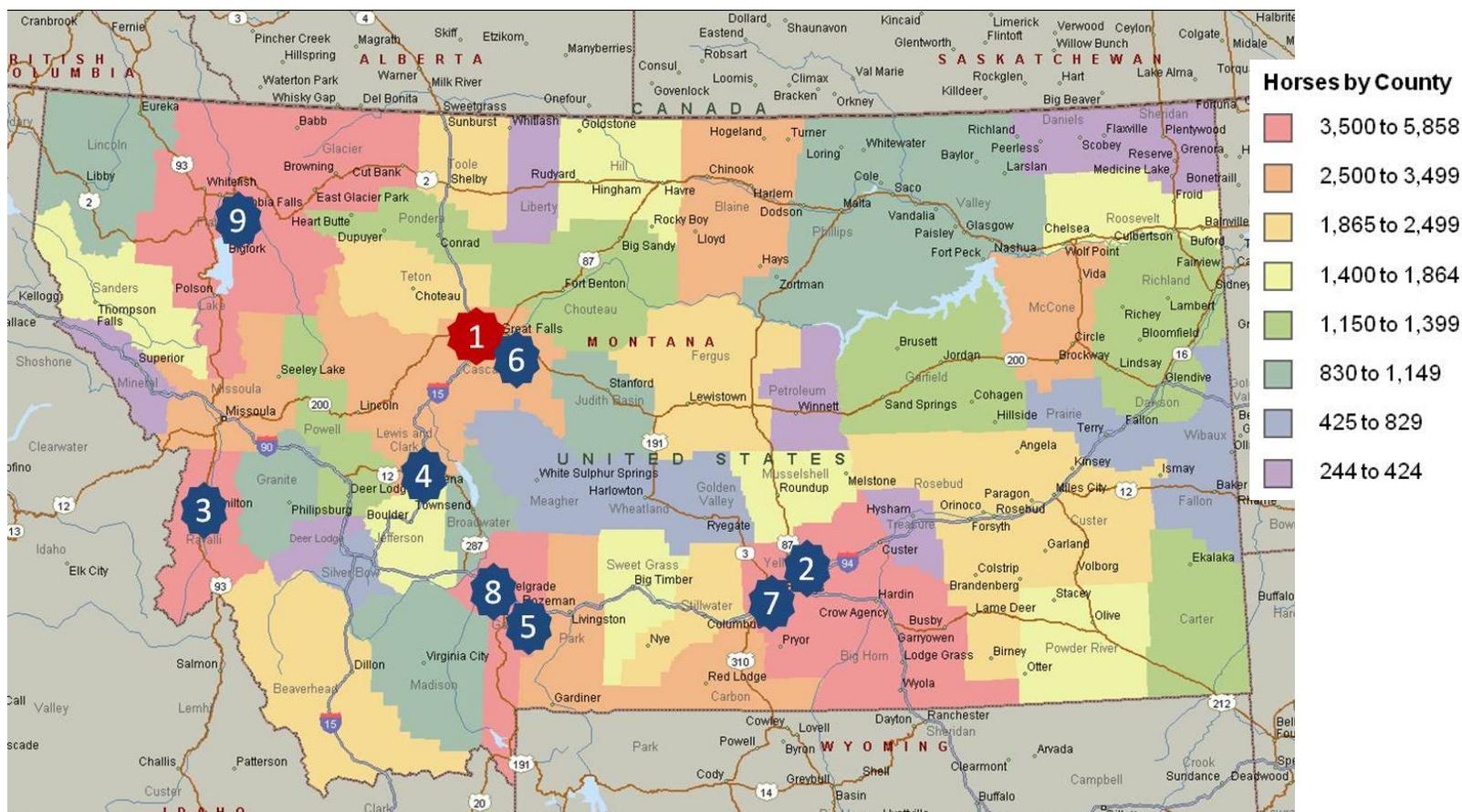
The USEF also governs breed shows held in the United States for the Andalusian, Lusitano, Arabian, half-Arabian, Anglo-Arabian, Connemara, Friesian, Hackney, Morgan, American Saddlebred, National Show Horse, Paso Fino, Shetland, and Welsh breeds. Other governing bodies include American Paint Horse Association (APHA), Appaloosa Horse Club (ApHC) National Cutting Horse Association (NCHA), National Reined Cow Horse Association (NRCHA), National Reining Horse Association (NRHA), Palomino Horse Breeders of America (PHBA), United States Team Penning Association (USTPA) and United States Team Roping Championships (USTRC).

All of these governing bodies have specific rules, requirements and restrictions related to moving an existing or creating a new event. Most governing bodies consider moving an existing event the same as creating a new event. One of the factors impacting the ability to stage more horse shows at ExpoPark facilities is the “mileage restriction” (the minimum distances shows can be held at the same time) clause of the show approval process of each governing body. Below is a listing of the mileage restrictions for the major governing horse show bodies.

Governing Body	Mileage Restriction
United States Equestrian Federation	50 miles to 250 miles (radius), depending on show rating
American Quarter Horse Association	150 driving miles
Appaloosa Horse Club	150 mile radius
American Paint Horse Association	250 driving miles
National Reined Cow Horse Association	300 mile radius
National Reining Horse Association	500 mile radius
Palomino Horse Breeders of America	350 mile radius
United States Team Roping Championships	None, case by case
United States Team Penning Association	None, case by case
National Cutting Horse Association	500 miles to 800 miles (driving)

HORSE POPULATIONS

Every 5 years the United State Department of Agriculture conducts a comprehensive survey of key agricultural trends, by county, throughout the United States – via the National Agricultural Statistics Service (the NASS) – including estimates of horse populations. The last survey was conducted for the year 2007. According to the NASS, in 2007, Cascade County had just under 2,900 horses, ranking 9th in the State of Montana. The State of Montana reported about 105,000 horses in the 2007 NASS Survey; up from 94,300 in 2002. The map below shows the 2007 NASS horse count for all counties in Montana and the locations of ExpoPark and principal competitive horse show facilities.



It is interesting to note that larger horse show facilities are located in counties (or multi-county regions) with higher overall horse populations, such as the Yellowstone/Bighorn area (MetraPark and Miller’s Horse Palace), Gallatin County (Gallatin County Fairgrounds and Circle L Arena), Ravalli County (Sapphire Events Center) and Glacier/Flathead/Lake Counties (Majestic Valley Arena).

COMPETITIVE ASSESSMENT SUMMARY

Based on the assessment and comparison of the variety of competitive and comparable facilities in the Denver MSA, we note the following:

- ExpoPark is the largest multi-use event facility in the Great Falls area, even extending to the Helena market area.
- While Mansfield Convention Center (≈15,000 sq. ft.) and Best Western Heritage Inn (≈12,000 sq. ft.) have higher grade of convention space than ExpoPark, these facilities lack larger trade show space, as well as an adequate number and size of breakout meeting rooms to support larger (400+ delegates) conventions and conferences.
- ExpoPark could be more competitive with both Mansfield Convention Center and Best Western Heritage Inn for smaller consumer and public shows, trade shows, spectator events and larger banquets with improved and expanded spaces.
- While Four Seasons Arena does not compete directly with other arenas in Montana (except for High School sports tournaments), its seating size and configuration limits its ability to attract national acts that are on a circuit in the Rocky Mountain area.
- ExpoPark is lacking an adequate equestrian center facility (centralized indoor and outdoor arenas, stalls and parking) to be competitive for more horse shows and clinics.

INPUT, INTERVIEWS AND SURVEYS**RECAP OF PRIMARY RESEARCH TASKS**

To gather relevant information to assess felt needs, community support and market demand for events and activities that could be held at the Fairgrounds, we conducted a number of tasks, including:

- Surveyed and interviewed major users/stakeholders of Montana ExpoPark to gather information about new event opportunities, deficiencies with existing MEP facilities/services, and pricing sensitivity. Included in these interviews/Surveys were ExpoPark Advisory Board members, Cascade County Commissioners, Great Falls Economic Development Authority, Home and Garden Show, Green Living Expo, MAGIE, Four Season Sports Foundation, Tourism Business Improvement District, Fisher Radio Garage Sale, What Women Want show, Dana House (Concert Promoter), Montana High School Association, Electric city Kennel Club, Montana Pro Rodeo Circuit Finals.
- Research and gathered information about numerous other larger events held at MEP on a recurring basis, including pari-mutuel horse racing, horse shows, consumer and trade shows and car shows.
- Conducted surveys of local businesses to identify needs for off-site meeting, training and banquet facilities.
- Conducted surveys of Montana state associations to identify interest in Great Falls as a location for conventions, conferences, and meetings and to identify related facility needs.
- Conducted on-line surveys of the general public to gather input as to the types of other events and activities that are desired to be held at Montana ExpoPark.
- Conducted email surveys of Montana Horse Clubs and Associations to identify potential demand for expanded/new equestrian show facilities at ExpoPark.

LOCAL BUSINESS SURVEYS

Markin Consulting coordinated the administration of an e-mail survey to Great Falls area businesses by the Great Falls Chamber of Commerce. Chamber members were directed to our website to complete and submit an on-line survey of their off-site facility needs. Below is a summary of the survey results.

- 14 surveys were returned, of which 11 indicated it uses off-site facilities for training, meetings, banquets and similar uses
- 9 of the 11 respondents indicated that the facilities they use (either on-site or off-site) are adequate for their needs
- Even though the overwhelming majority use facilities that currently meet their needs, 8 of the 11 respondents (73 percent) indicated they would consider using facilities at the ExpoPark
- Of all the respondents, the types of events listed included banquets, conferences, meetings and trade shows

ASSOCIATION/CONVENTION SURVEYS

Markin Consulting administered an on-line survey to state and local professional associations and meeting planners in Montana. Below is a summary of the survey results.

- 17 surveys were completed, of which 14 (82 percent) indicated interest in hosting an event(s) in Great Falls.
- On the question of whether the association would be willing to use “stand-alone” facilities (not attached to a hotel), 11 of the 14 respondents interested in Great Falls (78.5%) answered “yes.”
- The general type and range of the amount of space needed by the interested respondents are as follows:
 - Amount of space needed for exhibitor booths average between 4,000 square feet to 20,000 square feet, with one respondent needing close to 55,000 square feet of exhibit space
 - Number of delegates attending range from 40 to 800, with most being in the 300 delegate range
 - The average number of meeting/breakout rooms is 3 to 6, with a few needing more than 10

The table below is a detailed list of those respondents interested in hosting a convention or conference in the Great Falls area and that would be willing to use stand-alone facilities.

Montana ExpoPark Association Survey Respondents Interested in Great Falls Facilities		
Association	Event Type	Month Held
Montana Funeral Directors Association	Convention	June
Montana NonProfit Association	Convention	September
Montana Police Protective Association	Convention	July
Mental Health America of Montana	Conference	May
Montana tavern Association	Convention	September
Montana Seed Growers Association	Training	January
Montana Contractors Association	Convention	January
Montna Telecommunications Association	Conference	August
Montana Grain Growers Association	Covention	December
Montana Hospital Association	Convention	January
Montana School Boards Association	Convention	October

HORSE CLUB SURVEYS

To assess the potential demand for equestrian facilities at ExpoPark, we conducted surveys of a variety of horse clubs and show promoters to determine interest and needs in using equestrian facilities at ExpoPark. Below shows the horse clubs that were sent surveys – both first and, if necessary, second requests.

- Montana Reining Horse Association
- Montana Barrel Horse Association
- Montana Cutting Horse Association
- Montana Hunter Jumper Association
- Montana Quarter Horse Association
- Montana Paint Horse Association
- Montana Appaloosa Horse Club
- Northwest Montana Team Penning Association
- Wrangler Team Roping Championships

We received responses from the Montana Barrel Racing Association, Montana Hunter Jumper Association, Wrangler Team Roping Championships, and the Montana Cutting Horse Association.

GENERAL PUBLIC SURVEY RESPONSES

We received 90 usable responses to the on-line survey, asking for input about the types of events and activities desired at the Montana ExpoPark facilities. Exhibit B contains the responses, along with the city of residence and number of years at that address. Below is a summary listing of recurring comments and themes of the survey responses.

Montana ExpoPark	
Public Survey Responses for Types of Activities at ExpoPark	
Barrel Racing and Practices	Fund Raisers
Basketball, Volleyball, Wrestling	High School Graduations
Christian Church Services	Monster Truck Show
Comedy Shows/Concerts	More Rock Concerts
Conventions and Conferences	Moto Cross
Eliminate Horse Racing	Public Horse Riding
Extend the Horse Racing Season	State FFA, FCCLA Competitions
Farmer's Market	Wedding Receptions
Fewer Country Concerts	

PARI-MUTUEL TREND ANALYSIS

Montana Pari-Mutuel Racing Statistics Live Race Meet Handle				Montana Pari-Mutuel Racing Statistics Number of Live Race Days				Montana Pari-Mutuel Racing Statistics Average Handle Per Race Day			
	2008	2009	2010		2008	2009	2010		2008	2009	2010
Billings	\$601,300	\$655,600	\$609,500	Billings	8	8	8	Billings	\$75,200	\$82,000	\$76,200
Great Falls	367,900	272,500	342,000	Great Falls	7	5	6	Great Falls	52,600	54,500	57,000
Kalispell	0	0	101,400	Kalispell	0	0	2	Kalispell	0	0	50,700
Miles City	93,400	101,100	114,700	Miles City	3	3	4	Miles City	31,100	33,700	28,700
Missoula	0	0	244,000	Missoula	0	0	2	Missoula	0	0	122,000
	<u>\$1,062,600</u>	<u>\$1,029,200</u>	<u>\$1,411,600</u>		<u>18</u>	<u>16</u>	<u>22</u>		<u>\$158,900</u>	<u>\$170,200</u>	<u>\$334,600</u>

Source: Montana Board of Horse Racing

According to Montana ExpoPark management, the pari-mutuel operations, including training time, results in a net loss for ExpoPark.

MARKET POTENTIAL AND FACILITY OPTIONS**Market Niches**

On the basis of factors affecting demand for facilities at Montana ExpoPark (location, area economics and demographics, competitive factors), interviews and surveys of current and potential users of ExpoPark facilities and our assessment of the optimal market opportunities for the future of ExpoPark, we believe the following expanded and new market opportunities exist for facilities at Montana ExpoPark:

- Additional concerts focusing on a diversity of music genres
- Spectator events, such as family shows, touring productions, indoor motor sports
- Local, state and multi-state/regional horse shows
- Conventions and conferences with over 350 delegates
- Banquets and receptions
- Local business meetings, training and seminars
- Small animal shows, such as dog, cat, bird and rabbit
- State and regional RV rallies
- Self-promoted consumer/public shows

Event Potential

Based on the medium to strong market potential, below are estimates of the ***additional events and activities*** that could be attracted to the Montana ExpoPark with current and expanded event facilities.

- Concerts – 4 to 6 per year, averaging 3,500 to 4,000 ticket sales per event
- Spectator events – 6 to 10 per year, ranging from 1,500 to 2,500 ticket sales per event
- Local/area horse events – 12 to 14 per year, averaging 40 to 50 horses per single day event
- State horse events – 4 to 6 per year, averaging 250 to 300 horses over 2.5 event days
- Multi-state horse events – 2 to 4 per year, averaging 500 plus horses over 4.5 event days
- Conventions/conferences – 12 to 18 per year, averaging 350 delegates over 3 days
- Meetings/training – 18 to 24 per year, averaging 2,500 square feet of space for a single day event
- Banquets and receptions – 12 to 15 per year, averaging 500 people per banquet/reception
- Small animal shows – 2 to 4 per year, averaging 30,000 square feet of exhibition space over 2 days
- State and regional RV rallies – 2 to 4 per year, averaging 75 to 100 rigs for a state rally and 200 to 250 rigs for a regional rally
- Self-promoted consumer/public shows – 1 to 3 per year, averaging 20,000 to 30,000 square feet of exhibition space

Market Opportunities and Operating Focus

Generally, the facilities at ExpoPark are highly used with recurring events and activities that need less marketing and more “maintenance” through high-touch customer service.

Equestrian Events

An existing market niche of ExpoPark that is most prone to competitive forces is equestrian events and activities. Sub-standard indoor arena and stalls, as well as a very poor layout of equestrian facilities, significantly limit ExpoPark’s attractiveness for state and multi-state/regional horse events. Even local and smaller state-based equestrian events either have moved to other facilities or are in danger of being lost to competitive facilities.

New Market Niches

New market niches for ExpoPark include conventions and conferences, mid-to-large banquets and receptions, small animal shows and RV rallies. Small animal shows and RV rallies could be attracted to ExpoPark’s existing facilities with focused marketing (research, identification, cold calls, tour and proposals) and minimal investments in temporary electrical and water lines for RV rallies.

To attract local banquets and receptions, ExpoPark needs a combination of focused marketing and facility upgrades – including wall coverings in the Exhibition Hall, bathroom upgrades and addition of a catering kitchen.

State conventions and conferences appear to be a highly attractive new market niche for ExpoPark, generating not only net operating revenues for ExpoPark but also significant economic benefits for the local business community. To successfully capture some of the state convention/conference market, significant facility changes are needed to the Four Seasons Arena and Exhibition Hall, including acoustic upgrades, air wall dividers in Exhibition Hall, additional restroom facilities, catering or commercial grade kitchen, lighting enhancements and overall aesthetic improvements.

From a marketing and operational perspective, ExpoPark marketing staff will need to work closely with the Great Falls Convention and Visitors Bureau, local hoteliers and the Tourism Business Improvement District to market and retain conventions and conferences at a stand-alone location.

Additional spectator events (family shows, indoor motor sports and similar activities) would require a significantly different indoor venue than the Four Seasons Arena. Such a venue would need to be more of a traditional arena facility with a concrete arena floor, fixed individual seating and high ceiling.

Facility Options

The table below shows the general facility requirements to successfully attract and retain the events and activities discussed on the previous page, along with potential for significant economic impacts to the Great Falls/Cascade County area.

Event	Estimated New Events per Year	General Facility Needs	Economic Impacts
Concerts	4 - 6	Current Four Seasons Arena or New Arena	No
Spectator Events	6 - 10	New Arena	No
Local Horse Shows	12 - 14	Current Livestock Pavilion or New Equestrian Center	No
State Horse Shows	4 - 6	New Equestrian Center	Yes
Multi-State Horse Shows	2 - 4	New Equestrian Center	Yes
Conventions/Conferences	12 - 18	Renovated 4-Seasons and Exhibit Hall or New Conference Center	Yes
Meetings/Training	10 - 15	Renovated Exhibit Hall	No
Banquets/Receptions	12 - 15	Renovated Exhibit Hall	No
Small Animal Shows	2 - 4	Current Exhibit Hall and Four Seasons Arena	Yes
State & Regional RV Rallies	2 - 4	Current Tree Areas and Expanded Grass Area in Infield	Yes
Self Promoted Public Shows	<u>3 - 4</u>	Renovated 4-Seasons and Exhibit Hall	No
	<u>73 - 103</u>		

As noted above, the current facilities at ExpoPark are adequate for additional concerts, and small animal shows (dog, cat, bird, rabbit, etc.) and RV rallies. To attract these events/activities, marketing needs to be more focused in the areas with research, identification, cold calls, tours and proposals.

To address market needs of conventions and conferences, equestrian shows, meeting/training activities and mid-to-large banquets and receptions, the following facility improvements are recommended.

Conventions/Conferences and Banquet Facilities

- Upgrade the Four Season arena with accessible bleachers, sound/acoustic enhancements, large blade fans, additional restrooms, paint structural steel and remove ice pit
- Upgrade Exhibition Hall with metal liner panels, large blade fans, additional restrooms, painting of structural steel, additional restrooms, air walls and improved connection/renovation of restrooms/green room area
- Add a commercial grade kitchen to Exhibition Hall

Equestrian Center

- Construct an indoor, dirt floor arena to the east of the Four Seasons Arena that would consist of:
 - 140' x 280' dirt floor
 - 2,500 to 3,000 bleacher seats
 - 100' x 100' enclosed warm-up arena
 - Multiple concessions areas
 - Restrooms and showers
 - Box office
 - Judges and show office
 - Announcers platform
 - Heat, power vented and large blade fans
- Demolish select horse stall barns in back-side and construct a new multi-purpose horse/livestock barn (adjacent to the indoor arena) with:
 - Portable/movable stalling for 300 horses
 - Wash racks
 - Show office and restrooms
 - Electrical at each stall
 - Water bib at each end of stall row
- Build an uncovered, outdoor arena (150' x 300') in close proximity to the indoor arena and multi-purpose horse/livestock barn

To address the significant health/safety, structural and aesthetic deficiencies with the existing grandstand and to increase prospects for additional year-round activities, a new grandstand is an option for ExpoPark. A general design example for a new grandstand is presented in Exhibit_. Aspects of a new grandstand include 3,000 covered seats, concessions areas, restrooms and ticket office.

FINANCIAL ANALYSIS

This section presents the projected cash flows, before debt service, for the Facility Options for the Montana ExpoPark.

The projected statements of revenues and expenses are based on (1) the projected utilization of the Facility Options, recommended rental rates and operating policies presented in this document, (2) the estimated revenues that could be realized from operating the Facility Options and (3) the estimated expenses associated with the specific facilities. There will usually be differences between the estimated and actual results because events and circumstances frequently do not occur as expected, and those differences may be material.

The projections of incremental net cash flow, before debt service, for the proposed Facility Options are presented on the following page. These projections are presented in current year dollars and do not reflect any increase due to inflation.

Recommended Rental Rates

Based on the rental rates of competitive and comparable event facilities (local and regional), the following pricing structure is recommended for the proposed Facility Options:

- Upgraded Four Seasons Arena and Exhibition Hall
 - Daily rate of \$0.08 per square foot
 - Move-in, move-out rate of \$0.04 per square foot
- Equestrian Center Facilities
 - Indoor arena - \$1,500 per day
 - Uncovered arena - \$300 per day
 - Horse stalls in Multipurpose Barn - \$20 per day
 - RV sites for horse shows - \$30
 - Multipurpose Horse/Livestock Barn for livestock shows - \$1,000 per day
 - Haul-in fee for non-stabled horses - \$10
 - RV sites for RV rallies - \$15 per day

Financial Projections

We have presented the financial analysis using two scenarios – a low scenario and a high scenario, in terms of the number of events and activities. The low scenario represents the base amount of events and activities and the high scenario represents a best case scenario in which management is able to attract more events. We have also presented the financial analysis based on the Facility Options presented in the previous section of this report – Upgraded Four Seasons Arena and Exhibition Hall, Equestrian Center and RV Rally Facilities. All financial estimates represent incremental revenues and expenses over current ExpoPark operations.

Upgraded Four Seasons Arena and Exhibition Hall

Montana ExpoPark		
Arena/Exhibition Hall Incremental Revenue and Expense Potential		
	Low Scenario	High Scenario
Revenues		
Building rentals	\$109,000	\$173,000
Concessions	23,000	32,000
Self Promoted Events (net)	<u>38,000</u>	<u>76,000</u>
Total Revenues	<u>170,000</u>	<u>281,000</u>
Expenses		
Event Set-Up/Clean-Up	7,000	10,000
Utilities	22,000	30,500
General and Administrative	<u>5,000</u>	<u>8,000</u>
Total Expenses	<u>34,000</u>	<u>48,500</u>
Net Revenue Potential	<u>\$136,000</u>	<u>\$232,500</u>

Equestrian Center

Montana ExpoPark Equestrian Center Incremental Revenue and Expense Potential		
	Low Scenario	High Scenario
Revenues		
Building rentals	\$51,000	\$77,000
Stall income	137,000	242,000
Concessions	13,000	32,000
Advertising	7,500	10,000
RV space rentals	<u>45,000</u>	<u>87,000</u>
Total Revenues	<u>253,500</u>	<u>448,000</u>
Expenses		
Stall set and clean	13,000	25,000
Utilities	29,000	39,000
General and Administrative	<u>2,000</u>	<u>5,000</u>
Total Expenses	<u>44,000</u>	<u>69,000</u>
 Net Revenue Potential	 <u>\$209,500</u>	 <u>\$379,000</u>

RV Facilities

Montana ExpoPark Incremental RV Revenue and Expense Potential		
	Low Scenario	High Scenario
Revenues		
Building rentals	\$1,000	\$2,000
RV space rentals	<u>11,000</u>	<u>29,000</u>
Total Revenues	<u>12,000</u>	<u>31,000</u>
Expenses		
Utilities	2,000	5,000
Advertising/marketing	<u>500</u>	<u>500</u>
Total Expenses	<u>2,500</u>	<u>5,500</u>
 Net Revenue Potential	 <u>\$9,500</u>	 <u>\$25,500</u>

Revenue Assumptions

This section presents the underlying assumptions for the projected revenues shown on pages 47 and 48.

Upgraded Four Seasons Arena and Exhibition Hall Revenues

Revenues for the upgraded Four Seasons Arena and Exhibition Hall consist of building rentals, concession income and net revenues from self-promoted events. Building revenues are calculated using the recommended rental rates presented on page 46 and the projections of space needs and attendance estimates shown in the following tables (low and high scenarios).

Montana ExpoPark Potential Exhibition/Convention Space - Low Scenario										
Exhibit Building Uses	Number of Events	Average Event Days	MIMO	Total Use Days	Total Event Days	Square Footage	Total SF Event Days	Total SF MIMO	Ave. Attendance	Total Attendance
New Events										
Conventions/Conferences	12.00	3.00	0.00	36.00	36.00	30,000	1,080,000	0	350	4,200
Business Training/Meetings	18.00	1.00	0.00	18.00	18.00	2,500	45,000	0	N/A	N/A
Banquets	12.00	1.00	0.00	12.00	12.00	8,000	96,000	0	500	6,000
Small Animal Shows	<u>2.00</u>	2.00	0.50	<u>5.00</u>	<u>4.00</u>	30,000	<u>120,000</u>	<u>30,000</u>	300	<u>600</u>
	<u>44.00</u>			<u>71.00</u>	<u>70.00</u>		<u>1,341,000</u>	<u>30,000</u>		<u>10,800</u>

Montana ExpoPark Potential Exhibition/Convention Space - High Scenario										
Exhibit Building Uses	Number of Events	Average Event Days	MIMO	Total Use Days	Total Event Days	Square Footage	Total SF Event Days	Total SF MIMO	Ave. Attendance	Total Attendance
New Events										
Conventions/Conferences	18.00	3.00	0.00	54.00	54.00	30,000	1,620,000	0	350	6,300
Business Training/Meetings	24.00	1.00	0.00	24.00	24.00	2,500	60,000	0	N/A	N/A
Banquets	15.00	1.00	0.00	15.00	15.00	8,000	120,000	0	500	7,500
Small Animal Shows	<u>4.00</u>	2.00	0.50	<u>10.00</u>	<u>8.00</u>	30,000	<u>240,000</u>	<u>60,000</u>	300	<u>1,200</u>
	<u>61.00</u>			<u>103.00</u>	<u>101.00</u>		<u>2,040,000</u>	<u>60,000</u>		<u>15,000</u>

Upgraded Four Seasons Arena and Exhibition Hall Revenues (continued)

Concession revenues related to the events shown on the previous page are as following:

- For conventions and conferences, it is assumed that one banquet would be held at ExpoPark facilities during the convention/conference and ExpoPark at a price of \$25 per plate and ExpoPark would receive 10 percent of the gross revenue as a fee from the caterer.
- For banquets, it is assumed that the average price per plate is \$20 and ExpoPark would receive 10 percent of the gross revenue as a fee from the caterer.
- For local business meetings/training, it is assumed that ExpoPark would receive no revenue from catering of lunches, if any.
- For small animal shows, it is assumed that ExpoPark would receive a net of \$3 per attendee over the course of each event, based on ExpoPark's historical net concession revenues.

Net revenues from ExpoPark producing 1 to 3 consumer/public shows consist of trade show booth space, electrical charges, sponsorships and concession revenue, as detailed in Exhibit C. Booth space and electrical charges are consistent with current charges by similar consumer/public events held at ExpoPark. Net per capita concession revenue is based on the recent historical experience of ExpoPark for similar events.

Equestrian Center Revenues

Revenues associated with the proposed Equestrian Center consist of building rentals, stall income, concessions, advertising and RV space rentals. Building revenues, stall income and RV space rentals are calculated using the recommended rental rates presented on page 46 and the projections of arena, stall and RV space needs shown in the following tables (low and high scenarios).

Montana Expo Park
Horse Show Assumptions - Low Scenario

Rally Types	Number Per Year	No. of Days	No. of Horses	Number of Stalls Rented	Exhibit Space			Assumed Attendance		RV Space Rented	
					Square Feet	No. of Days	Total Space	Per Event	Total	Per Event	Total
Multi-State Regional Show	2	4.5	500	4,000	15,000	2	30,000	1,000	2,000	125	1,000
State-Based Horse Shows											
Mid/Large	4	2.5	250	2,000	N/A	N/A	N/A	750	3,000	62.5	500
Small/Mid	12	1.0	40	<u>0</u>	<u>N/A</u>	N/A	<u>N/A</u>	<u>140</u>	<u>1,680</u>	0	<u>0</u>
				<u>6,000</u>	<u>15,000</u>		<u>30,000</u>	<u>1,890</u>	<u>6,680</u>		<u>1,500</u>

Montana Expo Park
Horse Show Assumptions - High Scenario

Rally Types	Number Per Year	No. of Days	No. of Horses	Number of Stalls Rented	Exhibit Space			Assumed Attendance		RV Space Rented	
					Square Feet	No. of Days	Total Space	Per Event	Total	Per Event	Total
Multi-State Regional Show	4	4.5	500	8,000	15,000	4	60,000	1,000	4,000	125	2,000
State-Based Horse Shows											
Mid/Large	6	2.5	300	3,600	N/A	N/A	N/A	900	5,400	75	900
Small/Mid	14	1.0	50	<u>0</u>	<u>N/A</u>	N/A	<u>N/A</u>	<u>180</u>	<u>2,520</u>	0	<u>0</u>
				<u>11,600</u>	<u>15,000</u>		<u>60,000</u>	<u>2,080</u>	<u>11,920</u>		<u>2,900</u>

Also included in building revenues of the Equestrian Center are rentals of the arena for two new rodeo-type events and rental of the multi-purpose barn for one large-animal livestock show.

- For the rodeos, it is assumed that ExpoPark would receive 10 percent of gross sales or \$1,500, whichever is greater. Assuming 2,500 ticket sales at an average ticket price of \$10, ExpoPark would receive \$2,500 per rodeo.
- For the livestock show, it is assumed that the 3 day show would pay \$1,000 per day for use of the multi-purpose barn for this event.

Equestrian Center Revenues (continued)

Concession revenues related to new events held at the Equestrian Center are:

- For horse shows, it is assumed that ExpoPark would receive a net of \$1.00 per attendee over the course of each event.
- For rodeos, it is assumed that ExpoPark would receive a net of \$2.50 per attendee.
- For the livestock show, it is assumed tat ExpoPark would receive a net of \$1.50 per attendee over the course of the show.

Advertising revenues are assumed to generate from the sale of banners and signs in the indoor arena.

RV Rally Revenues

Revenues generated from RV rallies consist of building and RV space rentals. The table below presents the assumed low and high scenarios for RV rallies, including number of rallies, average number of days per rally, number of rigs per rally and amount of building space rented.

Montana ExpoPark RV Rally Assumptions								
Rally Types	Number per Year		Number of Days/Rally		Number of Rigs		Amount of Exhibit Space	
	Low	High	Low	High	Low	High	Low	High
State Rallies	1	2	2	3	75	100	2,250	3,000
Small/Mid Size Regional Rallie	1	2	2	3	200	250	<u>6,000</u>	<u>7,500</u>
							<u>8,250</u>	<u>21,000</u>

For purposes of the projections, it is assumed that RV spaces for rallies would be \$15 per night and building rentals would be charged at \$0.08 per square foot.

Expense Assumptions

This section presents the underlying assumptions for the projected expenses shown on pages 47 and 48. Projected incremental operating expenses for the Facility Options are based on the historical costs of operating existing ExpoPark facilities. A description of the nature of the operating expenses is presented below.

Labor costs – Labor costs represent the cost of additional part-time labor needed for event set-up and clean up. Labor costs are based on Montana’s minimum wage plus employers share of FICA and Medicare.

Utilities – Incremental utility costs are based on approximates daily historical costs of utilities for existing ExpoPark facilities and the estimated daily costs of the proposed indoor arena. For purposes of the projections, utility costs for (1) the Four Seasons Arena and Exhibition Hall are assumed to be \$400 per day, (2) the Equestrian Center are assumed to be \$750 per day and (3) the RV spaces for rallies are assumed to be \$2.50 per day.

General and Administrative – General and administrative expenses cover the incremental costs of operating the Facility Options, including supplies, travel, postage, telephone, equipment rentals and other costs.

Advertising and Marketing – Advertising and marketing costs include the cost of mailings, travel and advertising in trade publications and other marketing costs.

ESTIMATED RANGE OF COSTS

Populous prepared cost estimates for the Facility Options presented on page 45. Order of magnitude costs projections are intended to give a range of building costs and are based on either gross building square footages or costs per seat and are given without the benefit of a detailed facilities program and architectural and engineering drawings. They are based on historic data of similar facilities, industry standards and allowances. The contingency and soft cost (AE fees, survey, testing, etc) percentages are consistent with national standards. Actual costs may vary.

Montana ExpoPark Renovated Four Seasons/Exhibition Hall Range of Costs		
Four Seasons Upgrades	Low	High
Building Costs	\$954,000	\$1,113,000
Contingency	143,100	166,950
Soft Costs	131,652	153,594
Equipment Costs	0	0
Total	<u>\$1,228,752</u>	<u>\$1,433,544</u>
Exhibition Hall Conversion		
	Low	High
Building Costs	\$315,000	\$345,000
Contingency	47,250	51,750
Soft Costs	43,470	47,610
Equipment Costs	0	0
Total	<u>\$405,720</u>	<u>\$444,360</u>
Full Service Kitchen		
	Low	High
Building Costs	\$187,500	\$225,000
Contingency	18,750	25,500
Soft Costs	24,750	29,700
Equipment Costs	<u>165,000</u>	<u>220,000</u>
Total	<u>\$396,000</u>	<u>\$500,200</u>
Total		
	Low	High
Building Costs	\$1,456,500	\$1,683,000
Contingency	209,100	244,200
Soft Costs	199,872	230,904
Equipment Costs	<u>165,000</u>	<u>220,000</u>
Total	<u>\$2,030,472</u>	<u>\$2,378,104</u>

Montana ExpoPark Equestrian Center Range of Costs		
Indoor Arena	Low	High
Building Costs	\$5,850,000	\$6,300,000
Contingency	585,000	630,000
Soft Costs	<u>772,200</u>	<u>831,600</u>
Total	<u>\$7,207,200</u>	<u>\$7,761,600</u>
Multipurpose Horse Barns		
	Low	High
Building Costs	\$2,400,000	\$2,700,000
Contingency	240,000	270,000
Soft Costs	<u>316,800</u>	<u>356,400</u>
Total	<u>\$2,956,800</u>	<u>\$3,326,400</u>
Outdoor Arena		
	Low	High
Building Costs	\$225,000	\$270,000
Contingency	22,500	27,000
Soft Costs	<u>29,700</u>	<u>35,640</u>
Total	<u>\$277,200</u>	<u>\$332,640</u>
Total		
	Low	High
Building Costs	\$8,475,000	\$9,270,000
Contingency	847,500	927,000
Soft Costs	<u>1,118,700</u>	<u>1,223,640</u>
Total	<u>\$10,441,200</u>	<u>\$11,420,640</u>

Populous has also prepared an estimate for replacing the existing grandstand with a new 3,000-seat grandstand at a cost ranging from \$6.65 million to \$8.13 million.

ECONOMIC IMPACTS

Overview

This section of this report presents the approach and methodology used to develop estimates of the potential economic impacts of visitors to the Cascade County area resulting from increased visitors related to new events held at the Facilities Options at ExpoPark.

Approach

Economic impacts are generally described as the amount of expenditures that occur in a defined geographic area, including subsequent re-spending of the initial expenditures. These impacts are referred to as **expenditure impacts**. A portion of the expenditure impacts is paid to local residents in the form of salaries and wages, referred to as **earnings impacts**. Similarly, the amount of earnings paid from the expenditures represent jobs to local residents – the number of jobs referred to as **employment impacts**. Lastly, certain expenditures made in the local economy by out-of-area visitors, as well as the operation itself, generate benefits in the form of state and local taxes – referred to as **fiscal impacts**.

Expenditure Impacts

The expenditure impacts consist of expenditures by non-local event participants and event producers. Non-local participant and event promoter expenditures represent those expenditures made by persons/businesses residing outside of Cascade County for lodging, food and beverage, retail purchases, transportation, entertainment and other expenditures. Expenditures of patrons living within the impact area are not included because those expenditures merely reflect a redistribution of expenditures within the impact area, and they do not represent incremental impacts.

The industry approach used to estimate the economic and fiscal impacts of the Facilities Options, as an employer, business and attractor, uses generally accepted economic principles. Fundamentally, these expenditures generate impacts through the following:

- **Direct Impacts** are those changes in the flow of dollars and employment in the local economy that result directly from incremental spending by the facility's non-local users on such items as lodging, retail, meals and the like.
- **Indirect Impacts** are created by (1) investment or spending of ExpoPark's and local business suppliers whose goods and services are used in its project, process or service and (2) household income changes (created by direct and indirect effects on wages and employment) lead to further spending throughout the city, county and regional economies.

Indirect impacts (expenditures, earnings and employment) are quantified through an economic phenomenon known as the multiplier. The multiplier concept, based on the input/output economic theory, recognizes that there is a continued flow of money within and outside of a given area. Money is spent in successive rounds within a community, thus creating an economic impact in excess of the original direct expenditures.

The output multiplier represents the total dollar change in output (total expenditures) that occurs for each additional dollar of output (direct expenditures). The output multiplier includes the initial direct expenditure to which the multiplier is applied, except for the household multiplier (salaries and wages). For example, an output multiplier of 1.80 for hotels and lodging places means that for each \$1.00 spent for lodging, an additional \$0.80 is spent by the lodging establishment and supporting industries (wages, goods and services, capital improvements). The \$1.00 is the **direct impact**, the \$0.80 is the **indirect impacts** and \$1.80 is the **total economic impact**.

Earnings Impacts

A part of the initial expenditures and resulting indirect impacts result in the payment of salaries and wages to local residents. As an example, a portion of the initial expenditures of non-local participants and event producers for lodging, meals and other will be paid to workers in the hotel, restaurant, retail and other industries in the form of earnings. In addition, as a result of the expenditures of operating the facilities, a portion of those expenditures will result in earnings to persons employed by utility companies, insurance companies and other businesses. An earnings multiplier that is applied to the initial impacts to estimate the amount of the initial and indirect impacts that is paid out in earnings to local residents.

The earnings multiplier represents the estimated total (direct and indirect) salaries and wages that result from each additional dollar of direct expenditure. Assuming an earnings multiplier of .5603 for lodging places, for every dollar spent by tourists for lodging, just over 56 cents is paid to regional households in earnings. These earnings are paid to employees of the hotel (direct) and to employees of businesses and industries that support the lodging industry (indirect).

Employment Impacts

In the case of the Facilities Options, there will be jobs in the local community that are supported from the initial expenditures of non-local participants and event producers. These impacts are expressed in terms of the number of jobs supported.

The employment multiplier represents the number of jobs that regional industries provide, both directly and indirectly, for each \$1 million of output (direct expenditures) of a given industry. Continuing the hotel example, if the employment multiplier for lodging is 20.9, then for every \$1 million dollars spent by patrons for lodging, 20.9 jobs are required - both at the lodging facility and at industries supporting the hotel such as the utility company, telephone company, laundries, delivery services, and others.

Methodology

Non-Local Participant Expenditures

The increase in non-local event participant expenditures are expected to occur from three principal sources – (1) conventions and conferences, (2) horse and animal shows, and (3) RV rallies. All other new events identified for the Facilities Options are either already occurring in the Great Falls/Cascade County area or would involve spending by residents of the Great Falls/Cascade County market area (a redistribution of local dollars, not new money to the area).

Convention and Conference Impacts

To estimate the initial expenditures of out-of-town attendees and event promoters of state conventions that could be attracted to the Upgraded Four Seasons Arena and Exhibition Hall, we utilized data prepared by the International Association of Conventions and Visitors Bureau Foundation – ExPact. ExPact provides expenditure estimates, based on market size, of attendees to conferences and trade shows, as well as the expenditures of the convention organizer and trade show exhibitors. Below are the ExPact expenditures for conventions in small markets (<500,000 people) that were used to estimate the initial direct expenditures associated with the potential conventions for ExpoPark.

Montana ExpoPark ExPact Daily Expenditures for Small Market	
Expenditure Type	Daily Expenditure
Lodging	\$80
Hotel Food and Beverage	26
Other Food and Beverage	50
Tours/Sightseeing	6
Recreation	2
Sporting Events	1
Retail Stores	29
Local transportation	8
Auto Rental	7
Gasoline, Tolls	10
Other	<u>1</u>
	\$220
Associaton Expenditures	22
Exhibitor Expenditures	<u>53</u>
	<u>\$295</u>

Based on the ExPact expenditure estimates for convention delegates, associations and exhibitions and the number and size of conventions that could be attracted to use upgraded facilities at ExpoPark, the total estimated initial expenditures are estimated to range from \$3,717,000 to \$5,575,000.

Source: IACVB Foundation

Impacts of Non-Local Horse Show Participants

To estimate the range of initial expenditures of horse show participants/attendees, the number of non-local visitor days is first calculated by multiplying the number of shows, event days per show and the number of people assumed per animal. The resulting range of visitor days is then adjusted to account for only non- Cascade County area visitors. The resulting non-local visitor days are then multiplied by the estimated daily spending, by type.

Using the number of horse and animal shows and respective number of event days and attendance (shown on page 51), the total number of visitor days is estimated to range between 18,600 (Low Scenario) to 34,800 (High Scenario).

We used data developed in previous studies – 8 to 10 studies conducted by Markin Consulting – to prepare an appropriate estimate of average daily spending, by type, by non-local participants and attendees. In the previous studies, we conducted surveys of participants and promoters of horse shows to gather expenditure data for specific shows. We used a composite of the results of those survey results, adjusted for the general lodging rates in the Great Falls area.

Below are the daily expenditure estimates of non-local participants of horse and animal shows used in the economic impact analysis.

Montana ExpoPark Daily Spending Per Person of Non-Local Horse/Animal Show Participants	
Expenditure Type	Amount
Lodging	\$41.97
Meals	16.07
Transportation	18.34
Entertainment	3.41
Retail	9.71
Materials/Supplies	7.93
Other	<u>1.92</u>
	<u>\$99.35</u>

Using the assumed range of non-local participants/attendees and the average daily spending by non-local participants, the resulting initial expenditures made by these participants are estimated to range from \$1,860,000 to \$3,460,000.

RV Rally Impacts

To develop estimates of expenditures of participants in state, regional and national RV rallies, we used the results of similar rally participant surveys that we conducted in recent years. Below are the calculations of the estimated range of initial expenditures related to the regional RV rallies at ExpoPark – both low and high scenario.

Montana ExpoPark		
Potential Direct Spending of Potential Regional RV Rally Participants		
	Low	High
Number of Events	1	2
Number of Participants	200	250
Number of Days	3.0	3.0
Estimated Spending per party, per day		
Lodging	\$0.00	\$0.00
Meals	127.21	127.21
Transportation	105.25	105.25
Entertainment	20.33	20.33
Retail	124.67	124.67
Other	<u>82.54</u>	<u>82.54</u>
	<u>\$460.00</u>	<u>\$460.00</u>
Estimated Expenditures		
Lodging	\$0	\$0
Meals	25,000	64,000
Transportation	21,000	53,000
Entertainment	4,000	10,000
Retail	25,000	62,000
Other	<u>17,000</u>	<u>41,000</u>
Total	<u>\$92,000</u>	<u>\$230,000</u>

Total Estimated Impacts of Events

Using multipliers developed by the US Bureau of Economic Analysis (RIMS II), we applied appropriate multipliers to the estimated initial expenditures, by type of expenditures, for all categories discussed above. Exhibit D presents the multipliers used in this analysis

The table to the right presents the total estimated annual impacts associated with operating the Facility Options at Montana ExpoPark.

In addition to the impacts shown in the table, the total room nights associated with the conventions and horse/animal shows are estimated to range between 21,700 and 35,700 per year. These room nights would generate between \$21,700 and \$35,700 in tax revenue for the Great Falls Tourism Business Improvement Board.

Montana ExpoPark		
Estimated Annual Economic Impacts from New Events and Activities		
Event	Low Scenario	High Scenario
<u>Conventions and Conferences</u>		
Initial Expenditures	\$3,717,000	to \$5,576,000
Induced Impacts	<u>2,373,000</u>	to <u>3,559,000</u>
Total Annual Impacts	<u>\$6,090,000</u>	to <u>\$9,135,000</u>
Earnings	<u>\$1,926,000</u>	to <u>\$2,890,000</u>
Jobs Supported	<u>99</u>	to <u>149</u>
<u>Horse and Animal Shows</u>		
Initial Expenditures	\$2,068,000	to \$3,784,000
Induced Impacts	<u>1,320,000</u>	to <u>2,407,000</u>
Total Annual Impacts	<u>\$3,388,000</u>	to <u>\$6,191,000</u>
Earnings	<u>\$1,067,000</u>	to <u>\$1,950,000</u>
Jobs Supported	<u>55</u>	to <u>98</u>
<u>RV Rallies</u>		
Initial Expenditures	\$167,000	to \$230,000
Induced Impacts	<u>106,000</u>	to <u>147,000</u>
Total Annual Impacts	<u>\$273,000</u>	to <u>\$377,000</u>
Earnings	<u>\$88,000</u>	to <u>\$122,000</u>
Jobs Supported	<u>4</u>	to <u>6</u>
<u>Total Impacts</u>		
Initial Expenditures	\$5,952,000	to \$9,590,000
Induced Impacts	<u>3,799,000</u>	to <u>6,113,000</u>
Total Annual Impacts	<u>\$9,751,000</u>	to <u>\$15,703,000</u>
Earnings	<u>\$3,081,000</u>	to <u>\$4,962,000</u>
Jobs Supported	<u>159</u>	to <u>253</u>

COMPARISON OF OPTIONS

The table below presents a summary of key aspects of operational, economic and cost factors for the various components of the Facility Options presented in this report. Included in this table is the average cost estimates for each Facility Option, the projected net revenues (total and new events/markets only), the range of economic impacts and the annual return on investment (ROI) calculation using the projected net revenues from new market niches and the average total development costs.

	Renovated Four Seasons/Exhibition Hall	Equestrian Center	RV Rallies
<u>Magnitude of Costs (average)</u>			
Construction	\$1,570,000	\$8,573,000	\$0
Contingency	227,000	887,000	0
Soft Costs	215,000	1,171,000	0
Fixtures/Equipment	<u>193,000</u>	<u>300,000</u>	<u>30,000</u>
Total	<u>\$2,205,000</u>	<u>\$10,931,000</u>	<u>\$30,000</u>
Total Projected Net Revenues	<u>\$136,000 to \$232,000</u>	<u>\$210,000 to \$379,000</u>	<u>\$9,500 to \$25,500</u>
Projected Net Revenues from New Market Niches	<u>\$98,000 to \$157,000</u>	<u>\$210,000 to \$379,000</u>	<u>\$9,500 to \$25,500</u>
Estimated Annual Economic Impacts	<u>\$6.1 million - \$9.1 million</u>	<u>\$3.4 million to \$6.2 million</u>	<u>\$273K to \$377K</u>
Annual Return on Investment	<u>4.4% to 7.1%</u>	<u>1.9% to 3.5%</u>	<u>32.0% to 85.0%</u>

Exhibits

EXPO PARK/Montana State Fair

Great Falls, Montana

Populous was retained by Markin Consulting as a consultant to assist in a feasibility study of EXPO Park. In this phase of the study the task was to visually inspect the facilities, structures and grounds to document major concerns and deficiencies. The following is a result of a visual inspection August 23, 2010 with EXPO staff members. As note, this was a visual inspection only supplemented by staff comments and information contained in marketing materials. Life/ safety, American Disabilities Act (ADA) and building code compliance and environmental and structural studies are not in this scope of work. It is recommended that these studies be undertaken.

Overview

- The “historic” /older buildings were most probably designed without stringent building codes and certainly before the advent of ADA and current life /safety regulations. Presumably they were constructed to function primarily for the fair and as such were not multipurpose. Common limitations are the lack of adequate restrooms, energy efficient construction, and current ADA and life/safety code compliance. They are some functionally obsolete when compared to current design requirements but appear to be suitable for many of their uses. They are generally well maintained.
- The Four Seasons Arena and Exhibition Hall are the most current buildings with respect to code compliance and construction. They were presumably build in compliance with codes when constructed although original portions are now deficient in the number of toilet fixtures (particularity number of women water closets) and ADA requirements. The buildings are in generally good condition; HVAC systems and environmental controls have recently been replaced. Limiting factors in the building uses include general design, height to underside of structure, acoustics, seating and rigging capabilities.
- The racing complex (grandstands, support and outback) is dated and in need of repair. Buildings appear to be minimally acceptable at best and certainly not consistent with modern race facilities.
- The site can be broken into 3 use/image zones; the Four Seasons/Exhibition Hall and parking lot, the parks and historic buildings (including the Livestock Pavilion which is the exception), and the Grandstand/race complex. This division allows for the complex to be used simultaneously for different uses.

Facility Inventory Summary

EXPO Park/Montana State Fair is a 120 acre facility with 31 buildings (or named spaces). These spaces/buildings can be classified into three types: year around, fair oriented and the “out back” race component. An overview of each is as follows:

Year Round

The year around buildings are the Four Seasons Arena, Exhibition Hall, Trades and Industries, Atrium, Fine Arts, Family Living and the Paddock Club. To a lesser degree, the Grandstand and the Livestock Pavilion fit into this category, as well.

Four Seasons Arena: Built primarily as an ice facility (hockey and public skating) in the mid 1970’s, the Four Seasons Arena is used for a host of functions including concerts, basket ball tournaments, wheel events, livestock shows, PRCA rodeo, trade/consumer shows and general assemblies. An entry lobby with ticket booths, restrooms and a balcony were added in the early 1900’s as was the connected Exhibition Hall. Depending on the event and the spaces used, the seating capacities range from 3,100 for a banquet to 6,164 in concert mode. Although the full arena size (main and annex) is 53,000 sf, it is difficult to use together because the retractable bleachers between the main floor and annex which effectively splits the floor into two spaces.

The building appears to be well maintained and in relatively good condition. Staff reports that the HVAC systems, lighting and environmental controls are new. The only known maintenance problem is a couple of minor roof leaks. They are suspected to be due to poor flashing. The building is somewhat functionally antiquated because of the type, configuration and quality of the bleacher seating, the relatively low ceiling heights (reported to be 28’ but should be confirmed) and the location and number of restroom fixtures. An ADA study/inventory is recommended in that there appears a shortage of accessible restroom fixtures and seats. Suggested upgrades include the additions of accessible bleachers (or preferable stadia seats), sound enhancements, large blade fans, additional restrooms, repainting the structural steel and reconfiguring the ice pit since ice floor is inoperable and the equipment removed.

Exhibition Hall: The Exhibition Hall is attached to the Four Season Arena via a shared service corridor and facility core (restrooms, concessions and green room). A separate patron entrance is located adjacent to the parking lot. The 15,000 sf hall is used for trade/consumer and assorted shows and a host of other assembly functions. As with the Four Seasons, the ceiling height and OHD s are minimally adequate for the MAGIE and other large equipment shows. The overall building maintenance and condition appears good. Suggested upgrades are the addition of liner panels above the CMU and installation of large blade fans. Redesign of the facilities core would allow for direct access to the restrooms from the hall proper and wider patron connection from the annex/main arena.

Trade and Industries/Atrium /Fine Arts: These buildings are interconnected and can be used individually or in combination. Each has its own entrance and limited restroom facilities. These are three of the art deco building constructed in the late 1920s- early 1930s and recently renovated. The Trades and Industries is heated and cooled with swamp coolers which are reported to be marginally adequate. The 16,000 sf hall is used for trade/consumer shows, banquets and for general assemblies. Seating capacity is said to range from 1,600 in a theater configuration to 640 in the round. Restrooms are limited; there are additional ones in the adjacent Atrium.

The Atrium is slightly over 1,000 sf is heated and air conditioned. The primary use is for meetings; seating capacities 100 for theater and 40 in the round. The adjacent 2,600 sf Fine Arts component is heated only and used primarily for assemblies. The seating capacity ranges from 200 to 100. All three building appears to be well maintained and in generally good condition. Although somewhat functionally obsolete and not withstanding possible code inadequacies, they appear suitable for the current uses.

Family Living: As with the Trade and Industries/Atrium /Fine Arts buildings, the Family Living was constructed in the 1920- 1930s and had a modest “refreshing” in the 1990s. It is heated, vented but not air conditioned and has restrooms and a kitchen. Primary uses are for banquets, wedding, receptions and similar general assembly events. It is 5,000 sf. Overall maintenance appears acceptable and the building marginally suitable for the current uses.

Paddock Club: As the name implies, the Paddock Club is part of the Grandstand complex. In addition to race associated functions, is used for a variety of general assembly uses. It is divided into 2 halls one (side 1) of slightly less than 3,000 sf; the second (side 2) slightly more than 1,700 sf. Side 1 has a seating capacity from 100 to 200. Side 2 has a capacity from 60 to 150. It is heated and air conditioned. Both sides share common restrooms and have access to a full service kitchen. Although no deficiencies were noted, its general quality and aesthetics are marginal.

Grandstand: The Grandstand has a bleacher seating capacity for 2,420. In addition to racing, it is used for rodeos, concerts, and motor/dirt events. The facility is marginal and appears to lack many of the basic life/safety provisions of current codes. Other major deficiencies/shortcomings are the lack of adequate restrooms, designated accessible seating, crumbling concrete on the risers, splintering fiberglass bleachers, concessions areas, lighting in the concourse, ventilation and overall appearance. The basic structure appears to be in good condition; no warping, rusting, etc were noted. In addition to code improvements, the facility's appearance could be greatly enhanced by painting the structure in the concourse and "re-skinning" the exterior. The adjacent jockey's room is deplorable.

Livestock Pavilion: This 51,000 sf pre-engineered building is unheated, has a dirt floor in the arena proper, restrooms with showers, bleacher seats and a concession stand. Outside the fair, it is used for public riding, equestrian events, and selected consumer shows. Lighting is marginal, as is ventilation. The metal siding that extends to the ground shows some rust and rot. Recommended improvements are to construct a masonry wainscot, install large blade fans, renovate the restrooms, and paint the structural steel to visually lighten the appearance. Although inconsistent with the architecture of the other structures, it appears marginally adequate for the current uses.

Fair Oriented

The FFA Building, Heritage Building, Mercantile Building, Poultry/Rabbit Building, Nature's Den and the Horse and Pony barns were part of the original development were built primarily for the fair. With a few exceptions, they are generally unsuited for non fair uses except for rental storage.

FFA Building: The FFA Building is "T" shaped with 2 components: stalling space and an arena. They total 21,000 sf and have limited heated. With the exception of roof leaks, the overall condition of the building appears to be marginally adequate for fair use. Past non fair uses have been Christmas trees sales and livestock shows/sales.

Heritage Building: The Heritage Building is slightly less than 15,000sf of clear span space. It has been recently renovated, has minimal restrooms and is unheated. The overall condition and maintenance is very good. During seasonable weather it is used for variety of social functions and rental storage during the winter months.

Mercantile Building: This 15,000 sf landmark building has been recently renovated and appears to be in reasonable good condition. It is unheated and has limited restrooms. Non fair use is limited to occasional sales during seasonable weather and winter rental storage.

Poultry/Rabbit Building: Non fair use of this 10,000 sf building is limited to fowl and rabbit shows and sales. It has a concrete floor and unheated. It appears to be marginally adequate for current uses.

Nature's Den: The Nature's Den appears to be in generally good condition and well maintained. It is unheated. No non fair uses are known.

Horse and Pony Barns: These buildings are in need of repair including painting and roof repairs. They have limited non fair use.

“Out Back”

The “Out Back” consist of 9 race barns, test barn and race office. The barns are being repaired as funds are available. While they may be marginally acceptable for racing, they are unacceptable for non racing equestrian events. Major deficiencies include poor ventilation (except in the Rodeo Barn), limited water, poor lighting, unlevel stall flooring (dirt) and stalls general conditions, many of the stall doors are damages as are the interior walls.

City	Number of Years	Comments
Great Falls	More than 10	I would like to see more rock concerts brought to Great Falls. The young adult crowd of Great Falls needs more music that represents their age range and interest
Rayneford	Less than 3	I would really enjoy having an "off season" rate for the barns to hold some barrel races. It would be great to have an outdoor arena back in the barn area. We spend a lot of time at the fair and love to do anything that involves horses. The improvements that you have already made are great. Thank you, Janie O'Neil Box 196 Raynesford MT. 59469 738-4378
Helena	Less than 3	Some place close to barrel race both indoors and outdoors. I am all for you putting in an outdoor arena to use
Great Falls	5 to 10	I would like to see the barn be more accessible to local groups being able to utilize. An outdoor arena would be useful as well. Off season rates would help our local organizations. The livestock pavilion was built with community funding help and should be more user friendly for local events
Havre	Less than 3	I would like the county to take more of an active role in maintaining the Zion School. Currently, the maintenance of the building has been left to the responsibility of Scotty Zion who passed away in May. The school has been a wonderful and unique asset to the State Fair and receives a tremendous draw of visitors as documented by the Retired School Teachers that man it during fair week.
Havre	Less than 3 years	I am from Great Falls originally, live in Havre, and compete in rodeos and barrel racing events in the state including those held at the Expo Park. An outside arena in close proximity to the indoor arena would definitely benefit horse people. Competitors in all horse disciplines including rodeo, cutting, barrel racing, team roping, team penning, etc., need a warm up place when competing indoors. The current warm up area is too dusty and small. Additionally, an outside arena would benefit the horse community as there are only two outside arenas (King and GTF Saddle Club; JS is in Vaughn) located in Great Falls where public functions are held.
Stevensville	Less than 3 years	I think an outdoor arena would be great, Great Falls is a central place in with a lot of arena events happening. I think if the rates were right you would keep it busy all the time.
Billings	Less than 3 years	I lived in Great Falls for 40 years so hope you will accept my input. I am part of the NBHA that just used your Livestock Pavilion. Some input from that event would be: 1) you definitely need to clean up around your barns and do some repairs; 2) Livestock Pavilion worked well for our event; 3) Livestock Pavilion ground needed to be worked before we got there. We were told that you did a really nice job on the ground for a local event several weeks prior to our event. The problem is when people from other communities are heading up an event at your facility they don't know that you aren't going to prepare the dirt in the same manner for a large event such as this as you did for the smaller event earlier. It would be really nice to come and have it ready. Thanks for the effort put in that weekend to help us. 4) Outdoor arena....this would be a great thing for the community and also for people like our organization. It would have been possible that weekend to hold the event outside and that could be done many times. 5) Thanks for keeping your facility available at a reasonable cost for groups like ours.
Great Falls	More than 10 years	An outdoor riding arena would be a great addition to the Expo Park. Also "Off Season" rates for the livestock barn would be helpful.

City	Number of Years	Comments
Fort Benton	Less than 3 years	I raise and train barrel horses. I wish that the indoor arena was used more often for barrel racing jackpots, futurities, etc. I also think that if there were an outdoor arena at the fairgrounds, it would be used quite a little as well, provided the ground was worked properly for good footing.
Great Falls	More than 10 years	I would like to see more access to the indoor arena for barrel races. As a promotor you have to be able to hold the events on a smaller scale at an affordable price. I would also be excited to see an outdoor arena. My son has shown his pony at the State Fair for 12 yrs. I would be nice to have access to an outdoor arena for the speed events. It would be much safer for both the kids and the ponies.
Ulm	More than 10 years	I would like to see the addition of an outdoor arena for barrel racing, roping and other equine events. Currently the fairgrounds is limited to indoor arenas and the majority of equine events occur during the summer/fall months in Montana, and an indoor barn is too hot during the summer months for competitions.
Butte	Less than 3 years	More rodeos and horse racing
Gildford, MT	More than 10 years	We enjoy coming to the Montana State Fair as well as all of the high school events hosted there. While at the Fair we attend the horse races, rodeo, concerts, as well as the trade shows. We enjoy all of the livestock and other exhibits. We have also attended sales meetings in the past.
ULM	More than 10 years	I understand there is talk of putting in an outdoor arena.i feel this would be a great asset to the fairgrounds where as you would open up many aspects of the equine world from ropings too barrel races, reining, cutting ,working cow horse, 4-h shows, english jumping, dressage. the list goes on as there is a never ending possability with the equine world.And yet you are not limited to just that.You have 4-H jackpots you could do as far as showing cattle ,hogs, sheep.with the stalls that you have you could attract some of the top events in the state.Utilize what you have, build on what you dont.
Great Falls	More than 10 years	I have ridden horses for over 40 years now, and really appreiate having a public venue to be able to ride my horses. I ride "year round" and would love to be able to have indoor as well as an outdoor facility to be able to ride. Thank you for the opportunity to be able to ride at the Montana Expo Park for only \$10/session. I would love to see an outdoor arena and would like to be able to hold more barrel races. I know that money is tight all the way around, however I think if you institute an "off-season" rate the facility would be utilized more. Or a thought might also be to have a per-rider arena fee. At some of the barrel races this summer that totaled to probably \$750 for some of the one day races and we only used the arena probably 4 hours. I know this isn't always the case, however, I think in the long run with more use we would get more runners, therefore more money for our public facility.
Great Falls	More than 10 years	I would use an out door arena if they decided to put one in. Also if there was anyway they could make the Livestock Pavilion arena larger so it would be more compatible to more horse events that would be a good idea also. Also if they had a monthly rate for using the indoor arena. I know King does a rate of 100.00 a month if you don't want to pay the 10.00 each time. I also hope they are going to do there late hours again like last year. The lights on till 8 Tues - Thurs.
Great Falls	5 to 10 years	an outdoor arena for year round use - barrel races, horse shows, etc - also, an 'off season' rate for the livestock pavillion for the same uses

City	Number of Years	Comments
Vaughn	Less than 3 years	I am new to the area and having an arena that is open for public use year round would be very beneficial. I break all my own horses and having different places to go ride them for exposure is extremely helpful. Also any small barrel racings that would be held in the off season would be great.
Helena	More than 10 years	RODEO!! BARREL RACES !!!
Belt, Mt	More than 10 years	Fairground Uses: Livestock Pavilion should have a "off season" rent fee. I am a member of several barrel racing & team roping groups--we would use/rent an outdoor arena at the fairgrounds. One of our groups has a barrel race every wed. night during the summer. There are several other groups that would use an outdoor arena.
Great falls	More than 10 years	no I can think of any thanks
Great Falls	More than 10 years	Tear down the Four Season's and build a bigger/better multi use facility. Get a farmers market going that can be used all year round. Convert one or more of the buildings into a County owned health club facility, with a running/walking trail. Promote more horse racing, extending the horse racing season.
Great Falls	More than 10 years	I would like to see a 15000 minimum seating convention center that would be used for events. Great Falls is slowly/rapidly dying on the vine as every community of any consequence in the State is developing or adding to there own venue. We need to be able to command opportunities in sporting events, entertainment, conventions etc. We have very foolishly fell behind and as a citizen, I am absolutely disgusted and fed up with the failure to move ahead. The venue of the Expo Park should also be incredibly active in the bidding and securing of sporting events. Failure to do so is inexcusable, period.
Great Falls	More than 10 years	I continue to be impressed by just how much the ExpoPark is used. I hope this will continue and I ope you will gert some more fantastic ways to continue.
Great Falls	More than 10 years	Watch the beer vendors. They are selling to highly intoxicated people.
Great Falls	More than 10 years	More people would come to the fair if you brought back what a fair is suppose to be about. Montana Pride, and family entertainment. Fairs are suppose to be about people showing off their talents, crafts and animals. The fair has become to commercialized and what can we sell you, how much beer can we sell, and how much gambling money can we make. There is little at all to do for families. Most people I know won't bring their children. We exhibit animals and the fair now has dramatically raised entry fees, while decreasing premiums, yet offer free admissions to concerts to sell more beer and overpriced concessions. We have exhibited for the better part of 20 years and this was one of the worst fairs ever. Services were non existant, we were charged for reserved parking and then could not park in our assigned parking lot due to general admission without mirror tags were deliberatley parked in those lots. Blocking fire exits and making it very hard to get our animals to our vehicles. We heard numerous comments from the fairgoers that there were not enough animals they wanted to see more. Those with children were disappointed because basicaly, other than
Great Falls	More than 10 years	Big name rock bands.
Great Falls	More than 10 years	Comedy acts eg. Blue Collar Comedy...

City	Number of Years	Comments
Great Falls	Less than 3 years	Continue to fix up/repair the buildings should be high on the priority list. More concerts-keep ticket prices reasonable. I enjoyed the variety of different concerts during the 2010 Fair. It would be nice to have more concerts like that year round. More horse races and rodeos
Cascade	More than 10 years	I would love to see the horse races back more then two or three weekends. You run into a variety of people you may not see thru out the year.
Great falls	More than 10 years	High school graduations
Great Falls, MT	3 to 5 years	Well everything have been great but the advertising about the events need alot work. I can't read the electronic billboard on the corner of Northwest Bypass and 3rd st. Now that the computer is so important in everybodys life, I would think they should use it. Advertising the night of the program is just not going to get to many people to come.
Great Falls	More than 10 years	You need a Metra type facility in order to have large events that will impact our city.
Great falls	More than 10 years	concerts
Great Falls	More than 10 years	How about an Arena Football Team? Ok realistically, I think it would be nice to book a bigger name rock group for the State Fair. It appears as though the Fair attracts big name country acts and the rock acts are mainly (for lack of a better description) has been. The Hinder concert might have drawn a larger audience had it taken place during the fair. I do realize you are at the mercy of the bands and I really do appreciate even getting to see Hinder. I do love the horse racing and State Fair events and only have that one comment.
Great Falls	More than 10 years	I think that it should be more assessible to the people more than it has been.
Great Falls	5 to 10 years	Cristian Church Services.
Cascade County	More than 10 years	No, not that I can think of.
Dutton	Less than 3 years	Class C State Basketball Tournaments. More school events: State FFA; State FCCLA; State Music Festival, etc.
Great Falls	More than 10 years	The kinds of acts I would like to see, and have to leave town to see, are such things that simply do not fit the dimensions of our arena or the population of our community: Cirque du Sole and the like work in Spokane, as do the larger music concerts but avoid us because there is not enough \$\$ in the community to make those acts interested in stopping here.
Great Falls	More than 10 years	Maybe lower the rental fees for buildings a little and you would get more of the public renting the buildings for wedding receptions or fundraisers. It is better to take a little lower price and have income coming in than for it to sit vacant. Not that those are not taking place but I believe there could be a possibility of the buildings being rented much more frequently than they are. Perhaps a little advertising that they are available. There are endless uses but I don't think the average person thinks of the Fairgrounds as an available venue.
Great Falls	3 to 5 years	No, I think that you about covered it all. However, if you could improve the facilities you would draw more events and attendees -- Update the paint, doors and windows, add internet capabilities, improve traffic flow from one end to the other, etc...

City	Number of Years	Comments
Great Falls	5 to 10 years	Open facilities for public to ride horses. Make a big deal out of it and the people will come and eventually there will be events to charge for.
Great Falls	More than 10 years	Better to rent the buildings at lower prices than to leave them empty. We hear it's expensive to use the facilities. Did the winter storage thing go away?
Great Falls	More than 10 years	No
Great Falls	More than 10 years	Have better rock concerts with bigger names. Lower the price to get into the fair.
Great Falls	More than 10 years	No more fair for a while, at least while Cascade County is running it. It's a fairly spendy thing, pay to get in, park, and pay for everything else except the exhibits, which is all fine but my daughter wants to enter the flowers she has grown and you want here social security number?? Is that legal to ask for a minors SSN??????
Great Falls	More than 10 years	Country Concerts need to go away for one. I have never been to a concert in 5 or 6 years during the fair because everyone that is brought in sucks. I have been to a couple concerts not during the fair that were great. I would like to see more rock and roll groups. The price to get in is fairly high.
Great Falls	More than 10 years	In the past the Monster Trucks were here my five year old would love to see them back here.
Great Falls	Less than 3 years	ExpoPark has several spaces that would be ideal for hosting touring bands. The variety of sizes of space available would suit themselves to smaller acts as well as mid level acts. The current indie-rock climate has a plethora of smaller bands, and Great Falls hosts a number of college and highschool students that would sell them out. I would get in touch with regional, more grass roots concert promoters and set up rock shows much like Billings, Bozeman, and Missoula already do.
Great Falls	More than 10 years	Monthly concerts/events, either in the arena or outdoors in the summer. Mix of rock, pop, country, comedy, motor sports, rodeo, family. Grandstands are in need of major repair/renovation. Consideration should be given to an amphitheater type facility where a portion of it could be enclosed for smaller events (3000 people) during inclement weather and then opened up to 10,000+/- people for outdoor events. Unless we can accomodate 10,000 people at a concert, we will not be able to attract big-name performers of any genre.
Great Falls	5 to 10 years	I would like to see more motocross events at ExpoPark and more outdoor concerts. A three day event where people can camp and have concerts like a huge music festival.
Great Falls, MT	More than 10 years	Since the fair grounds is more than just a "fair," there are many things that it could use to be more profitable. An outdoor arena, better parking (dirt parking lot is a mess in the rain), newer bleachers, more concerts - both indoor and outdoor, a greater variety of concerts too - just because you don't like anything but C&W doesn't mean there is not an audience for Slipknot, Big Band, Pearl Jam, Rap, etc. Public awareness needs to be heightened as to the many uses of the grounds and buildings. If there was a way to keep youth out during non-event hours, it would help too. Locking gates may not be the only answer. After a heavy snow - there are lots of new drivers doing brodies in the huge lot - great temptation! Upgrading the RV area to compete with the two highly maintained competitors would help too. Wireless, better shower area, competitive rates, etc. Good Luck and hopefully this area could be more profitable and used more for the Great Falls area
Black Eagle	More than 10 years	Youth Activities

City	Number of Years	Comments
Great Falls	More than 10 years	Rock Concerts, Hip-hop Concerts, Pop Concerts then more Rock, Pop and Hip-hop Concerts please!
	More than 10 years	more concerts other than country! any event conduct to the black residents living in the county.
Great Falls	More than 10 years	The 4 Seasons arena building isn't big enough or designed to host large concerts and events. Need to tear down the back end of the corner where the horse stalls are and create a nice big pavillion-park. Large tournaments. State Wrestling could be there if it was big enough-take it away from Billings. Basketball, REAL CONCERTS - the ones that go to Billings, Bozeman, Missoula. With real seating, not chairs and benches. Eventually a really big fundraisers could be there. If it had nice seating, arena style, it could be more of a venue.
Great Falls	More than 10 years	More big name Rock concerts and maybe laser light shows.
Great Falls	5 to 10 years	MORE ROCK CONCERTS!!!!!! NEW ARENA!!!!!!
Great Falls	More than 10 years	I believe that if there are BIGGER named artists coming to Great Falls, the revenue would be substantial, in of itself. I strongly think there are NOT enough seating in the 4 Seasons, to accomodate some of these bigger named artists, hence the reason they do not come to Great Falls. If there was a BIGGER arena, like the METRA PARK in Billings, then we would be able to take advantage of having a lot more events and concerts coming to Great Falls, and a bigger bang for the buck. Great Falls, NEEDS an arena for BIG NAME ARTISTS, becuae they WILL NOT come without it. By having a bigger arena, will bring in people from all over suthern Alberta, Saskatchewan, B.C. and the surrounding states of Montana. With teh way it is now, we are lucky enough to bring in people from the City of Great Falls.
Great Falls	More than 10 years	I enjoy the fact that the Expo is bringing more entertainment to the Great Falls area! Great Job!
Great Falls	More than 10 years	please more rock concerts, there is lots and lots of people in this town that love rock, enuff with the country for a bit please. and if you bring in a rock show try for a weekend and better crowd control and traffic after any show gets out there. and some more cooking classes would be cool. thank you
Great Falls	More than 10 years	Anything you could bring into this town would help. The question I wonder about is how you keep all the employees you have on full time busy when you don't have that many events going on year around. With no events going on - how in the world do you pay them all - comes out tax payers money I guess. IF you can't get more events maybe you should be shutting it down in the winter months! When the City of Great Falls ran the park - they had about half the employees and more events - remember ICE - that was every night.
Great Falls	3 to 5 years	A new Event Center that could accommodate large shows in excess of 7500 people. It could capture more events, concerts, indoor rodeo events. Build it with a high enough ceiling to allow for indoor sporting events that require high ceilings. Build conference rooms to host business meetings. Include a kitchen that can provide for on site catering to all events, not just hamburgers and hot dogs. It would be great to include an indoor horse arena for those events as well. All enclosed to avoid all of the harsh Montana conditions.

City	Number of Years	Comments
Great Falls	3 to 5 years	I would like to see more heavy metal and rock concerts. Not all of us around here like country music. I liked attending some of the past concerts such as Disturbed, A7X, Papa Roach, Alice Cooper. I was excited to see Slipknot before they had to cancel the show. We need more acts like those here. If it is a big enough band, people will come from all over the state to see them! There is a big following around here for those kinds of acts!
Great Falls	More than 10 years	Mainly, I think the events need to be advertised more. There have been MANY events at Montana Expo that I did not hear of until after-the-fact, or only knew of because of where I work (AAA Construction).
Great Falls	Less than 3 years	The American Royal in Kansas City draws a big crowd every year. I don't recall all of the events, but for a rodeo, concert and bbq competition it seems to be a big event in that region. This sort of event may seem redundant with the fair, but it would be another good venue to showcase some Montana products and livestock
Great Falls	More than 10 years	the first thing we need done is a MAJOR update to that joke of an arena called the 4 seasons arena. it is no longer useable as what it was originally built for and cannot handle what many of the bigger name bands need for their performances. there is no reason we should not have something like the metra here to draw bigger events that otherwise would never consider this city. My opinion... do not waste time and tax payer money adding another building to it, that will not fix the problems. REBUILD IT!!!
Great Falls	More than 10 years	more rock concerts and hip hop concert
Great Falls	Less than 3 years	Monster Jam Monster Truck racing and freestyle event---Could be done indoor or outdoor. More concerts throughout the year especially during the winter---Christmas concerts would be nice, Many artists do Christmas shows in November and December. National Rodeo tour event--ie. PBR or other national full rodeo organization. Make fair concerts start at 7 pm or do 2 shows at 7 and 9 pm. I work 9 pm to 5:30 am and had to miss a concert this year because of the 9 pm start time.
Great Falls	More than 10 years	I would love to see a facility that would enable us to attract large musical acts. I would like the grounds to be open to the public, the County residents, for use as a walking site. The Exhibition Hall would be great for large training seminars; seems under-utilized.
Vaughn	More than 10 years	Montana Historical events featuring: Cascade County, Great Falls, County wide communities. Traveling exhibits from Museums (such as the Bozeman Museum, Denver Museum of Man and Nature, Butte Museum of Mining, Charlie Russel museum, Salt Lake, Helena Historical Museum, etc.), archaeological exhibits (such as Montana ghost towns, dinosaur finds, exhibits from native peoples, pishkin discoveries, Health related exhibits: (such as health fairs from Benefis (our area's largest employer), discoveries in cancer research, diabetes research, transplant technology, Continuing education events. Wood Carving exhibitions, shows, sales from local carving groups (we have two), State carving associations, and regional carving associations
Great Falls	More than 10 years	Love the concerts, keep them coming!!! More rock would be ok, doesn't have to be durring the fair can be another time of year. Its nice to see concerts here and not have to travle to Billings or Missoula or Bozeman. Also it would be nice if we could have a giant garage sale in one of the buildings one or 2 weekends a year. You just set up tables and charge like 5-10 dollars a table and we would rent them and bring all our stuff over and you advertise and we sell stuff. Just a thought??

City	Number of Years	Comments
Great Falls	More than 10 years	Hold ONE Alive @ 5 at the Three Rivers stage sometime.
Great Falls	More than 10 years	If the group is really interested in looking ahead, with the possible exception of the Metra in Billings, there is no real "Convention Center" It gets difficult to find private facilities that can host events when the number of attendees gets between 300-500 folks. I've been to public convention centers in St. Louis and Kansas City that are capable of hosting tens of thousands of people and an unlimited variety of events. Neither Cascade County or the City of Great Falls needs to match that capacity but who's to guess the future. Concerts/indoor events especially in the winter/conventions/shows, etc. Only the facilities will limit the options. We can plan to compete with Lethbridge/Calgary and Billings or Spokane for events and the economic benefit they bring or we'll resort to travelling to those cities and supporting their economies.
Great Falls	More than 10 years	as a horse person, the expo does not do justice. The Saddle Clubs around the vicinity are looking out of county for arenas that are big enough for our gaming. We are currently using JS Rodeo outdoor arena, FT Benton fairgrounds arena and the new arena in Choteau. We would generate money to the area if we had arenas that are built to suit the community not just horseshows, barrel racing groups or ropings. No, our family sport does not have dollar winnings but support good all fun for ALL(0-75 locally) ages that ride horses. The sport of O-mok-see is state wide and nation wide. Just this past year, the nationals were held in Kalispell which generate people from WA,ID,CO, KS, UT,WY,MN and MT for a week long show. Helena has also held them in the past. Put in something that can be used and is with in budgets for non profit organizations. We charge \$1 event locally and \$5 horse fee as some families have 4-5 horses and kids and can be affordable. We run numerous timed races in a day. We also have a State Show that travels from town to town in MT, we have use King arena and Fort Benton arena for our local clubs bibs. We have 5-7 local clubs as well. Any questions on our
Great Falls	Less than 3 years	A facility that can host large AA basketball, volleyball and wrestling tournaments. These events will bring more people to the county. More concerts and family shows that are PRICED for family participation.
Great Falls	Less than 3 years	A facility that can host large AA basketball, volleyball and wrestling tournaments. These events will bring more people to the county. More concerts and family shows that are PRICED for family participation.
Great Falls	More than 10 years	It would be really nice to have some of the concerts there that other Montana cities get when they come through (not just for the State Fair) but events like when country star Clint Black was in Billings. It would be nice to be able to congregate with other cities so the artists can play in more than one stop. I really enjoy the State basketball tourneys there although it would be nice to do some upgrades to Four Seasons with more seating and a better atmosphere including raising the roof so that maybe an arena football team could start here like it has in Billings. The grandstand could use another rodeo or two when the weather is nicer so that facility gets used more than just the fair for horse racing and the rodeo.
Great Falls	More than 10 years	More concerts all year long... More kid events family shows.
Great Falls	More than 10 years	Perhaps it would be nice if there was another large pavilion building built next to the four-seasons arena, and then it rented out to more events and that coincide with each other and would give exhibitions more space. For example, when the Charlie Russell Art Auction is on, the gun show is in the four seasons, the Contway is in the family living building and if there was another building next to it, another art venue could be housed in it. Also, lower the rental price for the buildings and book more activities to cover the price reduction. Maybe....

City	Number of Years	Comments
Great Falls	3 to 5 years	As a Sales Manager of a local Hotel, we would like to see the facility used for City Wide Conventions. Right now, with the space and capacities of the Four Seasons arena and Exhibition hall, there are not enough hotel rooms available in Great Falls to fill them, even with the new hotels coming online. This being said, the hotels could handle sleeping rooms for a group of 1,000 attendees if they were to book a 3 day conference. But, if they required Exhibit Space, Lunch and Dinner, General Session, and 10 break outs for 100 each, the Four Seasons and Exhibition hall are not configured to accommodate. True they could do the breakouts in other buildings, but in winter they would want to stay in a centralized location. Solution could be Air Walls.The Trades and Industries building, with a little work and airwalls and by including the attached Fine Arts complex, could handle the same requirements for group of 200-300 with 5 breakouts for 75. No other facility in our city is able to do this.Also, I remember going to concerts in the Heritage Building while in high school. With a little remodeling, i.e., restrooms, couldn't this building be used for smaller concerts and other events year
Great Falls	5 to 10 years	City/County needs an event facility that can accommodate multiple, concurrent meetings. Up to 8 groups of 25-40 and a space large enough for large group meetings up to 150-200 people - in one location. Get Rid of the horse racing...why does the commission support this at a loss to the county, that's poor mgmt of other people's money. not well attended, much better use of the space, raze the old buildings on the Stockman Bank side, get something functional instead of supporting/encouraging people's addictive gambling habits.it is appalling that Montana State Fair was over on Aug. 7th and all the exhibitor's are not paid. The entry office had all exhibitors paid within two weeks of the fair. how would the commissioners like to wait 2 mos to get paid? ought to ask people what events their currently attend to see how the facilities are used. Address rate issues sopeople could actually afford to use the facility.repair the buildings so they do not leak on people's events. it has been nice to see some of the updates going on - long overdue and much needed.
Great Falls	More than 10 years	It would be nice to see a few more kid friendly/ family friendly activities year round. Maybe like a winter carnival inside the expo park during jan/feb.
Belt	More than 10 years	I can't think of any new events. However, if there is an event coming to another city in Montana, why are we not bringing that act to Great Falls?
Great Falls	Less than 3 years	for a successful survey to be conducted, you should drive the survey-taker with specific questions!
Great Falls	More than 10 years	Get Rid of Horse Racing, And horse events
Great Falls	More than 10 years	outdoor concerts would be great. more rock concerts.
Great Falls	Less than 3 years	Monster Jam Monster Truck racing and freestyle event---Could be done indoor or outdoor. More concerts throughout the year especially during the winter---Christmas concerts would be nice, Many artists do Christmas shows in November and December. National Rodeo tour event--ie. PBR or other national full rodeo organization. Make fair concerts start at 7 pm or do 2 shows at 7 and 9 pm. I work 9 pm to 5:30 am and had to miss a concert this year because of the 9 pm start time.

Montana Expo Park
Revenue Potential for Self Promoted Consumers Show(s)

	Number of Booths	Cost of Each Booth	Revenue Potential
Inside Booth Sales	100	\$400	\$40,000
Outside Booth Sales	0	\$0	<u>0</u>
Total Booth Sales			<u>\$40,000</u>
Sponsorship Revenues			<u>25,000</u>
	Attendance	Net Per Cap Sales	Revenue
Concession Revenues	4,000	\$1.00	\$4,000
	Number of Elec. Outlets	Cost Per Outlet	Revenue
Electrical Revenue	50	\$30	\$1,500
Revenue Potential			\$70,500
Expenses			
Payroll			7,500
Advertising			10,000
Postage			1,000
Printing			2,500
Utilities			1,500
Security			5,000
Entertainment			<u>5,000</u>
Total Expenses			<u>32,500</u>
Net Revenue Potential per Show			<u>\$38,000</u>

Montana ExpoPark
RIMS II Multipliers Used In Analysis

RIMS II Category #	Industry	Final-Demand Multiplier		
		Output	Earnings	Employment
<u>Multipliers Used For Visitor Expenditures</u>				
28	Retail trade	1.6233	0.5289	23.8454
59	Hotels and motels	1.6256	0.4947	24.5875
57	Other amusement and entertainment	1.8008	0.6446	28.3277
60	Food services and drinking places	1.6585	0.5100	33.8327

Source: Bureau of Economic Analysis, 2011