



Project Report

Economic Impact Study of the Green Bay Packers and the Redeveloped Lambeau Field

Prepared for

The Green Bay/Brown County Professional Football Stadium District

Submitted by

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General & Limiting Conditions

Every reasonable effort has been made to ensure that the data contained in this report are accurate as of the date of this study; however, factors exist that are outside the control of AECOM and that may affect the estimates and/or projections noted herein. This study is based on estimates, assumptions and other information developed by AECOM from its independent research effort, general knowledge of the industry, and information provided by and consultations with the client and the client's representatives. No responsibility is assumed for inaccuracies in reporting by the client, the client's agent and representatives, or any other data source used in preparing or presenting this study.

This report is based on information that was current as of September 2010 and AECOM has not undertaken any update of its research effort since such date.

Because future events and circumstances, many of which are not known as of the date of this study, may affect the estimates contained therein, no warranty or representation is made by AECOM that any of the projected values or results contained in this study will actually be achieved.

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This study is qualified in its entirety by, and should be considered in light of, these limitations, conditions and considerations.

I. Introduction and Executive Summary

Introduction

AECOM was retained by the Green Bay/Brown County Professional Football Stadium District to analyze the economic impact of the Packers and the redeveloped Lambeau Field to Brown County, Wisconsin.

Major tasks of this study included identifying and quantifying the following:

- The economic impacts of the Packers' training camp and home games, and Lambeau Field,
- The impacts attributable to the redevelopment of Lambeau Field,
- The impact of the redeveloped stadium on:
 - Surrounding property values,
 - Surrounding businesses,
 - Local attractions,
 - Business attraction, and
 - Local entertainment and meetings facilities.
- The potential for Lambeau Field to host other types of events,
- The need for future capital improvements that would generate impacts, and
- The value of earned media that is generated by the Packers and Lambeau Field, and other community-based impacts.

Executive Summary

The following briefly summarizes major estimates, analyses, and conclusions that appear in our full report.

Estimated Incremental Economic and Fiscal Impacts of the Packers and Redeveloped Lambeau Field

We have estimated the economic and fiscal impacts associated with the operations of the Packers and Lambeau Field for 2009 (including training camp, preseason and regular-season games, and Atrium events), as well as the impacts generated by the redevelopment construction project. Also, the Packers had previously commissioned a study to estimate their impacts in 2000. The incremental impacts – from the construction of the redeveloped stadium and the increased impacts from 2009 compared to 2000 – are summarized below.

Table 1: Summary of Impacts

	Construction 1999-2005	Incremental Operations 2009 - 2000
Direct Output (000)	\$133,365	\$74,218
Indirect + Induced Output (000)	\$69,145	\$32,336
Total Output Impact (000)	\$202,510	\$106,555
Employment (jobs)	881*	940
Wages (000)	\$79,486	\$16,331
Fiscal impacts (000)	\$5,777	\$5,599

*In the peak year of construction; employment impacts in other years are less.
Source: AECOM

One-time construction impacts captured by Brown County include \$203 million in spending, approximately \$79 million in wages, and \$5.8 million in tax revenues to various levels of government (in addition to approximately 880 jobs in the peak year of construction). Incremental operational impacts (in 2009 that exceeded 2000's impacts), which will recur annually but will vary based on actual use of the stadium, were estimated to be \$107 million in spending, 940 jobs and \$16 million in wages, and \$5.6 million in tax revenues. (In 2009, **total** impacts were \$282 million in output, 2,560 jobs and \$124.3 million in earnings, and \$15.2 million in tax revenues.)

Land Use Analysis

AECOM examined commercial and residential parcels and corresponding values around the stadium to better understand the potential impacts of locating within various proximities to Lambeau Field. Although most of the lots within three-quarters of a mile are residential, the commercial lots are larger, and the average land values per acre are higher, the closer they are to the stadium. There is a higher concentration of restaurants and gas stations near Lambeau Field than in other parts of Brown County, with restaurants (both limited and full-service) and bars experiencing higher average sales than similar businesses that are farther from the stadium. Businesses that choose to locate closer to the stadium, despite the higher cost for land, appear to benefit from additional traffic to and from the stadium.

Also, based on recent transactions for parcels near Lambeau Field, it has been shown that the market values of land can be significantly higher than the assessed values that are addressed in this report.

Surveys

AECOM completed surveys of various businesses, attractions, and facilities throughout the community. The following summarizes the results of these surveys.

Businesses Surrounding Lambeau Field

In general, most businesses indicated that their satisfaction with Lambeau Field since its redevelopment has increased or has not changed (this also applies to specific issues such as safety, the impact of the

stadium on their sales, and the ability of customers to access the business). Many businesses have experienced increased sales on Lambeau Field game/event days, and many have expanded or renovated their business as a result of the stadium redevelopment. However, it was noted that the redeveloped stadium now captures some of the spending that formerly took place off-site.

Local Attractions

In general, most survey respondents indicated that they are satisfied with the redevelopment of Lambeau Field, or have experienced no change in their satisfaction since the redevelopment. This also applies to its impact on attendance and sales. The one exception to respondents' satisfaction is their ability to book events, as the Atrium now hosts many events that were formerly held at other local facilities.

Local Hotels and Meetings Facilities

According to hoteliers and meetings facilities that responded to the survey, the greatest satisfaction related to the redeveloped stadium's impact on event/game day and -weekend visitation, as well as increased room-night demand. However, room-night demand was also cited as one of the main characteristics that respondents were least satisfied with, in addition to their ability to book events. However, when asked to quantify the number of events that hotels and meetings facilities have lost to the Atrium, the most common responses were no more than two events, indicating that many Atrium events are in fact new to Green Bay and Brown County.

Business Growth, Attraction, Retention, and Marketing

A separate survey also addressed the role that the Packers and Lambeau Field play in business attraction, retention, and local marketing efforts. Seventy-five percent of respondents indicated that the benefits they receive from the presence of the team and stadium have increased since the redevelopment (in the form of increased sales, improved quality of life, and use of the team or stadium for marketing, entertainment, and other similar purposes). The remaining 25 percent indicated that their benefits have decreased significantly. In addition, 84 percent of respondents indicated that the presence of the team and stadium were a minor or significant positive factor in deciding to locate their business in Brown County, and none considered it to be a negative factor. In terms of marketing, public officials responded that the Packers are the area's top asset and are responsible for creating the area's brand and image.

Other Potential Events for Economic Impacts

In addition to meetings, exhibitions, and other similar events that are held in facilities similar to the Atrium, other major stadiums often host events that use the playing field. However, the number and type of these events can be affected by a wide range of variables, such as climate, facility design and technology, ownership/management, the local market, and others. These events can include concerts (a limited number of stadium acts are generally available), college football games (particularly neutral-site regular-season games), high school football games (which may generate more limited impacts), and other sports and entertainment events.

An increase in training camp and Atrium event attendance would create additional impacts to Brown County, as 82 percent of training camp attendees and 60 percent of Atrium event attendees in 2009 were non-local. However, the scale of additional impacts from an expansion of Lambeau Field for additional game-day capacity would likely be the greatest, as demand clearly exists for additional seating and this would bring the highest number of visitors to Brown County. Other stadium events, such as concerts, high school and college football, and other sports and entertainment events could also generate significant impacts, which would all be “new” to the County since these events are not currently being held locally.

Capital Improvements for Additional Impacts

Across the NFL, teams and facilities are planning and implementing major capital improvements in order to remain competitive and generate revenues; this includes both in-stadium improvements as well as new developments and amenities on surrounding land. From interviews with industry professionals, Lambeau Field appears adequate to host typical and potential stadium events with the exception of professional soccer, due to its small playing surface.

Aside from the size of the field, two other areas stand out as needing improvements that could generate additional economic impacts. First, demand for Packers tickets clearly exceeds supply, and due to the high share of non-local attendees of Packers games (more than 85 percent), an increase in the stadium’s seating capacity would lead to greater impacts. Also, the fact that most of Lambeau Field’s premium seating is located behind inoperable windows essentially makes the seats unusable for events such as concerts, which limits the profitability and viability of an event for a promoter. With a reduced seating capacity and the loss of high-priced tickets, an event’s ability to generate sufficient revenue is decreased.

Estimated Value of Earned Media

Measuring the impact or value of media coverage is difficult to do, and generally inexact. However, the Packers monitor their coverage on television network and cable outlets, as well as radio, on weekdays. During the 2009-10 NFL season, the Packers received an estimated \$14.2 million worth of media coverage across the country (the value is based on advertising rates for an equivalent amount of time) that reached more than 271 million people. (These values are clearly conservative since they only include TV and radio, and do not measure coverage on weekends.)

Other Community Impacts

In addition to the impacts attracted to Brown County based on the presence of the Packers and Lambeau Field, the team also makes direct contributions throughout the community in various ways. According to the team, the Packers had a “charity impact” of more than \$4 million in 2008. The team’s community involvement included personal appearances, donations of signed memorabilia, cash donations, volunteer time, organizing fundraising events, grants from the Green Bay Packers Foundation and individual players’ foundations, and participating in other outreach programs through various community organizations and the NFL.

II. Economic Impact Approach

This economic impact analysis evaluates the share of economic activity within Brown County, Wisconsin attributable to the operations of the Green Bay Packers and Lambeau Field, as well as the redevelopment of Lambeau Field. We also focus on the estimated impacts created by the team and facility before Lambeau Field's redevelopment, and the resulting incremental post-redevelopment impacts.

Methodology

This section presents the methodology for evaluating total economic impacts to Brown County. A general explanation of economic impacts and description of the components of economic impact are provided, followed by a description of the economic impact multipliers used for this study and other key assumptions. AECOM then describes the economic impact approaches used for team and stadium operations as well as the separation of pre-redevelopment impacts and post-redevelopment impacts.

Overview

Economic impacts can be described as the sum of economic activity within a defined geographic region resulting from an initial change in the economy. This initial change spurs a series of subsequent indirect and induced activities as a result of interconnected economic relationships.

Economic impacts only consider activity that would not have taken place in Brown County but for the presence of the team and stadium. For example, only operational and construction spending on local firms and spending by non-local residents are considered to generate impacts, rather than payments to non-local businesses and spending in Brown County by Brown County residents. This approach, while standard in estimating economic impacts, is likely conservative for a market such as Brown County in that the Packers are such an important part of the local sports and entertainment scene; without the Packers, it is likely that some of the spending related to the team by local residents would leave the market and be spent on items outside of Brown County. Nevertheless, no spending by local residents is included in this analysis.

Economic impact is composed of:

- **Direct Impacts:** Direct impacts represent the initial change in an economy attributed to the development under consideration. Direct impacts are measured in terms of direct output, earnings, and employment.
- **Indirect and Induced Impacts** (commonly referred to as the “multiplier effect”):
 - **Indirect Impacts:** Additional output, earnings, and employment generated as a result of the purchases in the industries which supply goods and services to the development under consideration.

- **Induced Impacts:** Additional output, earnings, and employment generated as a result of household purchases by employees.
- **Total Impacts:** The cumulative impact of the above components.



As mentioned above, impacts are often expressed in terms of three variables - output, earnings, and employment, which are defined as:

1. **Output.** The total value of goods and services produced across all industry sectors within a defined geographic region. For this analysis, it is expressed in constant 2010 dollars.
2. **Earnings.** The component of output that is attributed to labor income. These are also expressed in constant 2010 dollars. Earnings include both wages and income received by self-employed workers.
3. **Employment.** The total number of net new jobs (all jobs including full-time, part-time, and temporary labor) created in the economy.

Economic Multipliers

Economic multipliers measure the re-spending of dollars in an economy and are used to calculate direct and induced impacts, or the “multiplier effect.” Economic multipliers are developed using Input-Output tables, which provide information on all production activities and transactions between producers and consumers in an economy.

AECOM utilizes IMPLAN software, produced by the Minnesota Implan Group, to derive economic multipliers and total economic impacts (direct, indirect & induced). IMPLAN is an economic impact assessment software system. The IMPLAN program assembles economic accounts following the conventions used in the “Input-Output Study of the US Economy” by the Bureau of Economic Analysis and the US National Income and Product Accounts. The program provides users with substantial flexibility in terms of assumptions and methods.

The IMPLAN model is widely used across the United States by government and private entities to prepare location-specific economic impact analysis.

Analysis Framework

For each new economic activity resulting from the new development, direct impacts are determined first and, using IMPLAN, multipliers are then applied to determine indirect, induced, and the resulting total economic impacts.

There are a number of alternative techniques in approaching impact analysis. The preferred approach is termed the “expenditure approach,” also known as the “analysis-by-parts” approach. Here we use the operating expenditures of each program element as the source of primary input. These “purchases” of goods, services and labor are then regionally adjusted to derive direct impacts, and appropriate multipliers are applied to provide indirect, induced and total impacts. This method allows for a greater level of detail for the particular program element analyzed. The alternative to this is the “revenue approach,” which instead of using operating expenditures uses program revenues as the input, and we apply broader industry multipliers to derive total impacts.

Given the fact that detailed expense data is available for the stadium component, the “analysis-by-parts” method is used to estimate the economic impact of stadium operations, and the revenue approach is used to estimate the economic impacts resulting from all other developments.

Derivation of the direct impacts depends on the nature of the activity under consideration and the economic approach taken. The revenue approach is used to calculate the economic impacts from all other sources including stadium visitors’ offsite spending. Under the revenue approach, direct impacts are generated from either sales revenue or employment and employment to output ratios.

Once AECOM determined the direct, indirect, and induced economic impacts, we compared like parts to the 2000 Impact Study completed by another firm. For comparison, we inflated the 2000 estimates to 2010 dollars using the US Consumer Price Index. We then subtracted the 2000 estimate from our 2010 estimate, in order to arrive at the net new impacts resulting from stadium redevelopment. While this approach can highlight the general incremental level of benefits generated, it should be noted that there are likely additional impact drivers that are also responsible for the increase. Also, some “noise” in the 2000 and 2009 estimates make a completely apples-to-apples comparison difficult, as 2000’s impacts were likely increased by the recent Super Bowl victory and the rising popularity of marquee players, while 2009’s impacts were likely hurt by the current economic conditions that have slowed tourism and associated spending. As a result, were 2000 and 2009 more similar to “typical” years, the incremental impacts between the two years would likely be greater than those estimated in this report.

Expenditure Approach

In the expenditure approach, the purchases of goods and services (operating expenditures) are used to calculate economic impacts, instead of total revenues. Using operating expenditures instead of total

stadium revenues accounts for the actual dollars spent in the local economy and disregards stadium profits and other items that may often be invested elsewhere. Though the approach provides conservative results, it allows for a more detailed analysis to determine “net” impacts to the local economy.

The directly purchased goods and services (including labor) are considered the direct impact in output in the local economy resulting from stadium operations. Total direct impacts are then adjusted by applying appropriate factors to account for production and distribution cost components (for manufactured items) and direct expenditures made within the County.

Next, economic multipliers are applied to the adjusted purchases. Using the expenditure approach results in the induced and indirect impacts to the local economy. The direct impacts are then added to the indirect and induced impacts to obtain the total economic impacts.

Revenue Approach

The revenue approach is used to calculate the economic impacts from all other sources, including stadium visitors’ offsite spending and the impacts of visitation to the Atrium. Under the revenue approach, direct impacts are the net new total output/revenues generated within the local economy. While the revenue approach could be derived from a base estimate of new employment creation, AECOM uses estimated sales revenue to derive impact estimates using this method. For the retail and other off-site spending, sales revenues are used as direct output impacts. Total sales are adjusted to account for only the sales amount that is new in the County. Then, using these revenues as the direct output, the IMPLAN model estimates the direct employment and earnings for each element based on regional data. Economic multipliers are applied to the direct impacts to produce total economic impacts from each activity.

III. Economic and Fiscal Impacts of the Green Bay Packers to Brown County

As part of AECOM’s economic impact analysis, we have divided the impacts into four main categories:

- **Packers and Lambeau Field Football Operations** – this category includes the Packer organization’s annual operations, including football and stadium operations.
- **Packers Training Camp and Regular Season** – this category includes spending within Brown County by visitors who travel to Brown County to attend Packers games and training camp (including preseason games). Spending categories for analysis include food and beverage, lodging, retail, transportation, entertainment, and others.
- **Lambeau Field Atrium** – separate from team and stadium operations, event hosting in the Atrium generates visitation from out of the county. The spending in Brown County by these visitors is estimated and quantified in this category of impacts.
- **Impacts from Lambeau Field redevelopment activity.**

We also estimate the incremental economic and fiscal impacts of current team, stadium, and Atrium operations relative to the pre-redevelopment operations in 2000.

Packers and Lambeau Field Football Operations

Direct Impacts

This section presents the estimated economic impacts to Brown County associated with the Green Bay Packers’ annual operations, based on 2009 team data. AECOM used the expense approach to determine direct impacts. Total spending by the team is reduced to estimate spending that occurred within Brown County, based on player and staff residency data as well as vendor location data. The following shows total team expenses as well as the share spent within Brown County.

Table 2: Packers 2009 Team and Stadium Expenses (thousands)

Expense category	Total	Brown County
Player costs	\$138,697	\$52,320
Team expenses	\$26,394	\$8,135
Sales and marketing expense	\$23,334	\$11,936
Operations/maintenance (net)	\$7,701	\$5,939
General and administrative	\$31,694	\$10,678
Total	\$227,820	\$89,007

Source: Green Bay Packers, AECOM

Indirect and Induced Impacts

To determine the indirect and induced spending within Brown County generated by the Packers’ annual operations, AECOM used IMPLAN’s input-output model and impact multipliers. Total impacts from operations are shown in the next table.

Table 3: Total Economic Impacts – Packers and Lambeau Field Football Operations (thousands)

	Packers Operations FY 2009
Direct Output (000)	\$89,007
Indirect and Induced Output (000)	\$51,646
Total Output (000)	\$140,652
Employment (jobs)	760
Wages (000)	\$80,636

Source: AECOM

In 2009, total economic impacts attributed to the Packers and Lambeau Field are approximately \$141 million, in addition to 760 jobs and \$80.6 million in wages.

Fiscal Impacts

In addition to economic impacts such as output, employment, and income, the Packers' operations also create fiscal impacts for the local and state economies. Fiscal impacts are generated by the following taxes.

- State sales tax: 5%
- Stadium District Tax: 0.5%
- Lodging Tax: 8% of lodging expenditures to Green Bay
- State Income Tax: Varies by income from 4.6% to 7.75%

The following table shows AECOM's estimate of these fiscal impacts related to the Packers' and Lambeau Field's operations in Brown County.

Table 4: Total Fiscal Impacts – Packers and Lambeau Field Football Operations (thousands)

Tax Type	Amount Taxable (000)	Tax Revenue (000)
State Sales	\$8,747	\$437
County Stadium District	\$8,747	\$44
Lodging	\$19	\$2
State Income	\$80,636	\$5,241
Total		\$5,724

Source: AECOM

Total tax revenues to various levels of government are estimated to be \$5.7 million, the majority of which are income tax revenues to the State of Wisconsin.

Packers Training Camp and Regular Season

Direct Impacts

Visitors who come to Lambeau Field for Packers games from outside of Brown County generate economic impacts to the County by spending money locally on lodging, food, shopping, and other items. AECOM used the results of two separate surveys to estimate these impacts – one for Packers games (including pre-season) and another for training camp. Data collected includes visitor origin, length of stay, type of lodging, and spending estimates that are used to estimate direct new spending in the County that occurs because of the Packers' presence.

Estimates of the impact on Brown County are generated from visitor survey data that was compiled during training camp and throughout the regular season (surveys were distributed at all home games). The following table shows selected survey data and the corresponding estimates of attendance by non-Brown County residents.

Table 5: Results from Visitor Surveys

	Training Camp	Packers Games
Total Attendance	34,000	729,280
Non-Brown County Visitor %	82%	87%
Non-Brown County Attendance	27,948	634,474
Average Length of Stay (non-BC residents)	1.82	1.57
Visitor Days (non-BC residents)	50,865	996,124
Average Party Size	3.2	3.4

Source: Visitor survey

In addition to the above information regarding Packers game and training camp visitors, the two survey efforts helped quantify the off-site spending patterns of the visitors. The following table highlights the results of the spending section of the surveys. The amounts shown represent per-party, per-day spending. (The average lodging spending includes all visitors, including daytrippers and those that did not pay for overnight accommodations.)

Table 6: Off-Site Visitor Spending – Per Visitor Party, Per Day

	Training Camp	Packers Games
Food	\$39	\$81
Lodging	\$77	\$67
Retail	\$83	\$49
Transportation	\$40	\$48
Wagering	\$39	\$15
Other Entertainment	\$24	\$12
Other	\$20	\$9
Total	\$323	\$281

Source: Visitor survey

Based on the data shown in the previous two tables, the following table highlights total estimated direct spending by these visitors within the County.

Table 7: Off-Site Visitor Spending in Brown County (thousands)

Spending Category	Training Camp	Packers Games	Total
Food	\$628	\$23,731	\$24,359
Lodging	\$1,225	\$19,629	\$20,854
Retail	\$1,319	\$14,356	\$15,675
Transportation	\$645	\$14,063	\$14,708
Wagering	\$626	\$4,395	\$5,021
Other Entertainment	\$387	\$3,516	\$3,903
Other	\$316	\$2,637	\$2,953
Total	\$5,146	\$82,327	\$87,473

Source: AECOM

As shown above, direct spending by non-local training camp visitors was approximately \$5.1 million in 2009, and spending associated with Packers games was \$82.3 million, for a total of \$87.4 million.

Indirect and Induced Impacts

Based on estimates of direct spending related to visitors who travel to Green Bay for Packers games and training camp, the following table shows estimates of indirect and induced economic impacts.

Table 8: Total Economic Impacts – Off-Site Visitor Spending at Training Camp and Games (thousands)

	Training Camp	Packers Games	Total
Direct Impacts (000)	\$5,146	\$82,327	\$87,473
Indirect + Induced Impacts (000)	\$2,295	\$40,978	\$43,273
Total Impacts (000)	\$7,441	\$123,305	\$130,746
Employment	90	1,580	1,670
Wages (000)	\$2,343	\$38,306	\$40,649

Source: AECOM

Total impacts to Brown County from off-site spending by visitors to training camp and regular and pre-season games are estimated to be approximately \$131 million. These impacts include earnings of \$40.6 million for the 1,670 jobs created in Brown County.

Fiscal Impacts

The fiscal impacts related to Packers games and training camp visitor spending are shown in the table below, based on the applicable taxes and tax rates.

Table 9: Total Fiscal Impacts – Training Camp and Games (thousands)

Tax Revenue (000)	Training Camp	Packers Games	Total
State Sales	\$242	\$3,705	\$3,947
County Stadium District	\$24	\$371	\$395
Lodging	\$98	\$1,572	\$1,670
State Income	\$152	\$2,490	\$2,642
Total Taxes	\$517	\$8,138	\$8,654

Source: AECOM

Total fiscal impacts (to various levels of government) were approximately \$517,000 from visitors to training camp, and \$8.1 million by visitors to Packers games, for a total of approximately \$8.7 million.

Lambeau Field Atrium

Direct Impacts

Similar to off-site spending estimates for visitors to Lambeau Field for Packers games, the Atrium draws visitors for events who travel to Brown County from outside of the area, utilizing local restaurants, shops, and hotels. The Packers provided data on Atrium events including the type of event and visitor origin. AECOM then filtered total visitation estimates, removing Brown County residents from the analysis as their spending is not considered new to the County. As previously described, only spending by non-Brown County residents is considered in this analysis. While other surveys (in Section VII) indicate that much of the Atrium’s events would not have otherwise been held in Brown County but for the presence of the Atrium, we nevertheless do not include local attendees’ spending.

Once we estimated the number of visitors who traveled to Brown County, we used information from the Greater Green Bay Convention and Visitors Bureau, as well as fan survey data, to estimate visitor characteristics such as length of stay and spending amounts. The following table summarizes the estimated characteristics of attendees to the Atrium.

Table 10: Atrium Attendance, Visitor Characteristics, and Spending

	Attendance	Percent out-of- county	Out-of- county visitors
Event type:			
Corporate	36,130	65%	23,525
Social/Non-profit/Association	24,466	53%	13,074
Spending:			
	Per person per day		
Food	\$30		
Lodging	\$60		
Retail	\$20		
Transportation	\$5		
Other Entertainment	\$5		
Other	\$5		
Total	\$125		

Source: Surveys, Greater Green Bay CVB, Packers, AECOM

Based on the information shown in the previous table, AECOM then estimated off-site spending amounts for visitors to Atrium events. These are direct economic impacts to the County, and are summarized in the next table.

Table 11: Atrium Visitor Spending (thousands)

Spending Category	Amount
Food	\$1,804
Lodging	\$2,831
Retail	\$1,202
Transportation	\$301
Other Entertainment	\$301
Other	\$301
Total	\$6,739

Source: AECOM

Non-local attendees of Atrium events are estimated to have spent approximately \$6.7 million in Brown County in 2009.

Indirect and Induced Impacts

The following table shows direct, indirect, and induced economic impacts generated by out-of-town visitors who attended events at the Lambeau Field Atrium in 2009.

Table 12: Total Economic Impacts – Atrium (thousands)

	Atrium Events
Direct Output (000)	\$6,739
Indirect and Induced Output (000)	\$3,418
Total Output (000)	\$10,157
Employment (jobs)	130
Wages (000)	\$3,046

Source: AECOM

As shown above, total economic impacts of the Atrium are estimated to be approximately \$10.2 million, in addition to estimated earnings for Brown County workers of \$3 million and 130 jobs created.

Fiscal Impacts

The fiscal impacts from Atrium out-of-town visitation are calculated based on the same tax rates as those previously listed for game and training camp visitor spending.

Table 13: Total Fiscal Impacts – Atrium (thousands)

Tax Type	Atrium Off-site Spending
State Sales	\$346
County Stadium District	\$35
Lodging	\$227
State Income	\$198
Total Taxes	\$806

Source: AECOM

Total fiscal impacts to Wisconsin from Atrium event visitation is estimated to be \$806,000, as shown above.

Incremental Operational Economic and Fiscal Impacts Resulting from Stadium Redevelopment

Economic and fiscal impacts resulting from the presence of the Packers and Lambeau Field to Brown County have been estimated as described above. To estimate impacts that are attributable specifically to the redevelopment of Lambeau Field, AECOM compared the estimated impacts in this study to a previous pre-expansion impact study completed in 2000 by PricewaterhouseCoopers and CSL International. While we did not have access to all analyses inherent in the previous study, we assume that its general methodology is similar to that of this analysis. Later in this section, we also estimate impacts generated by the construction of the redeveloped stadium, and these are also considered to be incremental impacts relative to 2000 operations. To compare the two estimates, we have inflated the

impacts from both study efforts using the US Consumer Price Index to 2010 dollar amounts. This allows for a comparison between amounts in consistent price levels.

The following table summarizes each study's impact estimates, and the difference between the two is assumed to result largely from the expansion effort, i.e., net new impacts generated by the investment in the stadium redevelopment (not including construction). The 2009 spending includes impacts from the Packers operations as well as off-site visitor spending at Packers games, training camp, and the Atrium. As shown below, the current impacts of the Packers in Brown County are approximately \$107 million greater than the impacts measured in 2000, after accounting for inflation. In addition, incremental impacts also include 940 jobs and \$16.3 million in earnings and \$5.6 million in fiscal impacts. The incremental spending impacts represent a 60 percent increase over the impacts from 2000 (not including any construction-related impacts).

Table 14: Pre- and Post-Expansion Impacts Comparison (in 2010 dollars)

	PwCStudy, 2000	Current Operations	Difference
Direct Output (000)	\$109,000	\$183,218	\$74,218
Indirect and Induced Output (000)	\$66,000	\$98,336	\$32,336
Total Output (000)	\$175,000	\$281,555	\$106,555
Employment (jobs)	1,620	2,560	940
Earnings (000)	\$108,000	\$124,331	\$16,331
Fiscal Impacts (000)	\$9,585	\$15,184	\$5,599

Source: Pricewaterhouse Coopers, CSL International, AECOM

Stadium Redevelopment Construction Impacts

Construction impacts measure the one-time impacts to the regional economy resulting from construction activity related to the redevelopment. AECOM first analyzed total development costs and, secondly, determined construction costs that were captured locally. For economic analysis purposes, only construction costs made within the County are considered to create changes in the regional economy and are included within the direct impacts. Next, using IMPLAN, multipliers are applied to the direct impacts to arrive at the total economic impact of construction to Brown County. As described above, these construction impacts are also considered to incremental impacts to the stadium redevelopment.

Stadium Redevelopment Construction Costs

The Lambeau Field redevelopment was a comprehensive project that brought the NFL's most historic and storied stadium into the 21st Century. New construction, renovations, and improvements included:

- **The Lambeau Field Atrium** – a 336,000-square foot, five-story, year-round events facility that includes a 25,000-square foot Packers Hall of Fame, meeting/convention space, restaurants and pubs, and a Packers Pro Shop.
- **Expanded seating** – an addition of more than 11,600 seats.
- **Football facilities** – including new home and visitors’ locker rooms, new and improved training facilities, meeting rooms, an auditorium, dining room and lounge, and other facilities.
- **Interior spaces** – include a new upper concourse, wider existing concourses, improved concessions and restrooms, and a club level for premium seat holders.
- **Robert E. Harlan Plaza** – which includes bronze statues of Curly Lambeau and Vince Lombardi.
- **Scoreboards** – new full-color LED video and score boards in the north and south end zones.
- **Other improvements** – including lighting and an improved press box.

The project began September 2000 with the approval of a half-cent sales tax increase in Brown County, which jointly funded the redevelopment along with the City of Green Bay, the Packers, and the NFL. This section estimates the various economic and fiscal impacts captured in Brown County from the construction project, based on actual construction and spending data provided by the District and the Hammes Company (the project developer), actual tax rates, and other estimates.

Impacts from Stadium Redevelopment Construction

The redevelopment of the stadium represented a one-time economic activity that created additional impacts to Brown County, based on spending on construction-related items such as labor and materials. This spending that was captured by local firms and workers is considered to be an economic impact to Brown County, and resulting tax revenues are the fiscal impacts. Because the redevelopment is a past event, actual data related to the construction project is available, and this forms the basis of our estimates of construction impacts.

The following table lists the actual uses of funds related to the stadium’s redevelopment. These figures are in nominal amounts and were spent between 1999 and 2005. In the summary of impacts included in this report, these amounts are inflated to 2010 dollars. Based on data provided by the District and Hammes, AECOM estimated spending in the following categories for each year during the construction period.

Table 15: Stadium Redevelopment Costs (thousands)

Cost	Amount
Site Acquisition and Improvements	\$1,033
Construction Costs	\$251,608
Furnishings, Fixtures and Equipment	\$15,365
Development Costs	\$34,156
Financing Costs	\$38
Net Other Project Costs (Capital Improvements)	\$2,212
Total	\$304,412

Source: GBBCPFSD, Hammes Co., AECOM

The following table summarizes the use of local labor, according to Hammes Co. construction documents.

Table 16: Labor Costs from Stadium Redevelopment

Spending on Brown County Firms	37.0%
Hours by Brown County Workers	30.1%

Source: Hammes Co.

In addition to construction labor, AECOM also estimated local spending for each of the additional spending categories. These assumptions are based on schedule of payments data from the Client, and are shown below.

- Furniture, Fixtures, and Equipment: 62% within Brown County.
- Development Soft Costs: 29% within Brown County.
- Site Acquisition: 100% within Brown County.
- Financing Costs: 0% within Brown County.

Lambeau Field Expansion and Redevelopment Economic and Fiscal Impacts Summary

The following table estimates economic impacts from the redevelopment of Lambeau Field from 1999 to 2005. These estimates are shown in 2010 dollars.

Table 17: Lambeau Field Redevelopment Construction Impacts (thousands)

	1999	2000	2001	2002	2003	2004	2005	Total
Output (2010 \$, thousands)								
Direct	\$54	\$2,449	\$27,196	\$71,330	\$29,139	\$3,120	\$77	\$133,365
Indirect + Induced	\$32	\$1,448	\$14,297	\$36,720	\$14,989	\$1,619	\$40	\$69,145
Total Output Impact	\$87	\$3,897	\$41,493	\$108,050	\$44,127	\$4,738	\$118	\$202,510
Employment (jobs)								
Direct	0.5	21.5	218.2	558.1	227.9	23.6	0.6	
Indirect + Induced	0.3	14.1	128.2	323.0	132.1	14.1	0.4	
Total Employment Impact	0.8	35.6	346.4	881.1	360.0	37.7	1.0	
Wages (2010 \$, thousands)								
Direct	\$33	\$1,454	\$11,880	\$28,650	\$11,650	\$1,170	\$31	\$54,868
Indirect + Induced	\$11	\$502	\$5,099	\$13,100	\$5,322	\$570	\$14	\$24,617
Total Wage Impact	\$44	\$1,956	\$16,979	\$41,750	\$16,972	\$1,740	\$45	\$79,486
Fiscal impacts (2010 \$, thousands)								
State Sales Tax	\$0.2	\$10.6	\$113.2	\$294.9	\$120.4	\$12.9	\$0.3	\$552.7
County Stadium District	\$0.0	\$1.1	\$11.3	\$29.5	\$12.0	\$1.3	\$0.0	\$55.3
Lodging	\$0.0	\$0.0	\$0.4	\$1.1	\$0.5	\$0.0	\$0.0	\$2.1
State Income	\$2.8	\$127.1	\$1,103.6	\$2,713.7	\$1,103.2	\$113.1	\$2.9	\$5,166.6
Total Fiscal Impact	\$3.1	\$138.9	\$1,228.6	\$3,039.2	\$1,236.1	\$127.4	\$3.3	\$5,776.6

Source: AECOM

The construction activity for the redevelopment effort generated over \$202 million in new economic output for Brown County over the construction period. This included roughly \$80 million in wages, resulting in more than 880 new jobs in the peak year of construction. In addition, total fiscal impacts were approximately \$5.8 million.

Summary

As shown in this section, the incremental economic and fiscal impacts of the Packers and Lambeau Field that are attributed to the Lambeau Field redevelopment are generated in the following ways:

- Impacts from 2009 that exceed impacts from 2000, and
- Impacts from the stadium redevelopment construction project.

These impacts are summarized below.

Table 18: Incremental Economic and Fiscal Impacts of Green Bay Packers and Lambeau Field (thousands)

	Construction 1999-2005	Incremental Operations 2009 - 2000
Direct Output (000)	\$133,365	\$74,218
Indirect + Induced Output (000)	\$69,145	\$32,336
Total Output Impact (000)	\$202,510	\$106,555
Employment (jobs)	881*	940
Wages (000)	\$79,486	\$16,331
Fiscal impacts (000)	\$5,777	\$5,599

*In the peak year of construction; employment impacts in other years are less.
Source: AECOM

As previously described, the construction of the redeveloped Lambeau Field generated more than \$200 million in spending impacts to Brown County, nearly \$80 million in wages, and \$5.8 million in various tax revenues. Annual employment totals from the multi-year construction project are not additive; however, in the peak year of construction (2002), more than 880 local jobs were supported. The construction project represents a one-time impact to Brown County.

In contrast to the construction project, operational impacts recur annually. Based on our estimates and the previous impact study, the incremental impacts of 2009 compared to 2000 include \$107 million in spending, 940 jobs and \$16.3 million in income, and \$5.6 million in tax revenues. These incremental impacts will vary from year to year based on changes in variables such as attendance, stadium and Atrium usage, and attendee characteristics, but will continue to benefit Brown County. Later sections of this report analyze ways in which these incremental impacts can be increased.

IV. Land Use Analysis

AECOM used data from available sources to examine land use around the stadium. In selecting their sites, businesses in Green Bay evaluate many factors including access to highways, location of nearest competitor, and many others. Here, AECOM was interested in learning more about those businesses located in the immediate vicinity of Lambeau Field to understand potential impacts related to the proximity to Lambeau Field.

Land Use near Lambeau Field

AECOM examined current parcel data from local assessors' offices for the immediate area surrounding Lambeau Field to better understand land use and value. There are more than 2,700 parcels within three-quarters of a mile of the stadium located in Green Bay and Ashwaubenon. As is addressed later in this section, the actual market values of many properties near the stadium are significantly higher than the assessed values, based on recent transactions. While similar data for previous assessment values (pre-renovation) was not available for a time-series analysis, we were able to derive the following information:

- According to the assessors' office, these parcels encompass a total of 840.7 acres, valued at approximately \$101 million. This includes industrial, public, and other parcels that are not analyzed in this section.
- The majority of the 2,704 parcels are residential lots located 0.5 to 0.75 miles from the stadium.
- The average lot size for commercial lots is higher as they get closer to the stadium, suggesting that:
 - Larger businesses could be attracted to proximity from the stadium,
 - Businesses can be larger because they are benefitting from demand associated with traffic to and from the stadium, and/or
 - Within 0.25 miles, the average commercial lot size is 1.25 acres. The opposite is true for residential parcels, as size is slightly larger as they move away from the stadium. This could be because the original neighborhood within the immediate vicinity of the stadium is older and has smaller parcels, compared to newer neighborhoods that may have created larger lots for residential development.
- There is a much higher ratio of commercial to residential acres closer to the stadium. Within ¼ mile of the stadium, approximately 20 percent of the total land area is commercial. This falls to about 7 percent in the next ¼ mile. This suggests that commercial development closer to the stadium may not otherwise be in business or may not be in the Green Bay area were it not for the existence of Lambeau Field.

The following tables summarize characteristics of land uses near Lambeau Field. The following two tables analyze parcels within one mile of Lambeau Field, and parcels within ¾ of a mile from the stadium, as this

is the limit at which complete data is available for all land uses considered. Data in the first table is from 2009, while the second table is based on census data, the most recent of which is from 2000. (Note: due to rounding, not all totals add to exactly the numbers shown.)

Table 19: Parcel Data for the Area Surrounding Lambeau Field, 2009

	Distance from Lambeau (miles)			
	0.25	0.5	0.75	Total
# of Parcels				
Commercial	18	28	42	88
Industrial			32	32
Residential	171	931	1,452	2,554
Public use	1	6	23	30
Total	190	965	1,549	2,704
Total acres				
Commercial	22.5	16.4	34.1	73.0
Industrial			41.8	41.8
Residential	35.6	214.1	362.5	612.2
Public use	52.7	9.6	51.4	113.7
Total	110.9	240.0	489.8	840.7
Average size (in acres)				
Commercial	1.25	0.58	0.81	0.83
Industrial			1.31	1.31
Residential	0.21	0.23	0.25	0.24
Public use	52.73	1.60	2.23	3.79
Total	0.58	0.25	0.32	0.31

Table 20: Housing Units by Year Built and Proximity to Lambeau Field, 2000

	0.25	0.5	0.75	1	GB	Ash.	Brown
Total Housing Units	221	1,063	1,634	5,080	43,125	7,261	90,199
Year Built (2000 Census data)							
1999 to March 2000	0.0%	0.0%	0.0%	0.0%	1.2%	1.0%	2.4%
1995 to 1998	1.8%	0.2%	0.1%	0.4%	4.7%	3.2%	9.2%
1990 to 1994	0.9%	2.4%	2.4%	1.9%	6.4%	10.6%	9.8%
1980 to 1989	4.1%	5.2%	4.7%	5.2%	13.9%	19.0%	14.7%
1970 to 1979	18.1%	13.5%	17.3%	16.7%	18.1%	33.3%	19.3%
1969 or Earlier	75.1%	78.6%	75.6%	75.8%	55.8%	32.8%	44.5%
Median Year Structure Built	1963	1964	1963	1963	1966	1975	1973

Land Values near Lambeau Field

The following table profiles residential and commercial lots and their associated value. In addition to land values, data was also provided on the value of improvements on the land, which includes the value of the buildings on the parcel.

- The average size of commercial parcels is much larger closer to the stadium whereas residential parcels become slightly larger as they move away from the stadium.

- The average value of commercial parcels is significantly higher closer in, with \$406,000 in land value and \$425,000 in improvements per parcel. For residential parcels, there is less differentiation by distance for both land value and improvements per parcel – a total of \$114,000 for parcels within ¼ mile and \$122,000 for residential parcels ½ to ¾ miles from the stadium.

To control for differences in parcel size, AECOM computed the average value of the land and improvements per acre:

- The average land value per acre for commercial land is significantly higher closer to the stadium. Within ¼ mile of the stadium, the average value per commercial acre is \$325,000 compared to \$248,000 within ½ mile and \$273,000 within ¾ mile. Residential land value per acre was slightly lower in the ¼ mile ring than in the outer areas – \$100,000 per acre compared to \$115,000 and \$103,000 per acre. For commercial land, proximity to the stadium appears to have positively impacted land values.
- The average value of improvements per acre for commercial is slightly lower closer to the stadium, an average of \$339,000 per acre within 0.25 miles. This may be due to the fact that commercial parcels are larger (more parking than building, etc.) and more big-box style development than more elaborate types of commercial building improvements. The average value of improvements per acre on the residential parcels is much higher closer to the field than those farther out (\$448,000 compared to \$385,000).

Table 21: Residential and Commercial Parcels near Lambeau Field, 2009

	Distance from Lambeau Field (miles)		
	0.25	0.5	0.75
Commercial			
Total parcels	18	28	42
Average size (in acres)	1.25	0.58	0.81
Total land value	\$7,313,000	\$4,060,000	\$9,325,000
Average per parcel	\$406,000	\$145,000	\$222,000
Average per acre	\$325,000	\$248,000	\$273,000
Total improvement value	\$7,643,000	\$6,091,000	\$16,129,000
Average per parcel	\$425,000	\$218,000	\$384,000
Average per acre	\$339,000	\$372,000	\$473,000
Total land value + improvements	\$14,956,000	\$10,151,000	\$25,454,000
Average per parcel	\$831,000	\$363,000	\$606,000
Average per acre	\$664,000	\$620,000	\$746,000
Residential			
Total parcels	171	931	1,452
Average size (in acres)	0.21	0.23	0.25
Total land value	\$3,552,000	\$24,543,000	\$37,191,000
Average per parcel	\$21,000	\$26,000	\$26,000
Average per acre	\$100,000	\$115,000	\$103,000
Total improvement value	\$15,962,000	\$94,801,000	\$139,625,000
Average per parcel	\$93,000	\$102,000	\$96,000
Average per acre	\$448,000	\$443,000	\$385,000
Total land value + improvements	\$19,515,000	\$119,344,000	\$176,815,000
Average per parcel	\$114,000	\$128,000	\$122,000
Average per acre	\$548,000	\$558,000	\$488,000

Assessed vs. Market Value

Over the past five years, the Packers have purchased 21 parcels near Lambeau Field totaling approximately 28 acres. According to a report by the Green Bay Press-Gazette, which reviewed local land records, the Packers have spent more than \$27 million to acquire these parcels, which is estimated to be approximately \$10 million over the assessed value. This higher cost may be attributed in part to speculation about future development; however, these transactions have shown that the true market values of parcels, particularly surrounding Lambeau Field, are in many cases higher than the assessed values.

Based on the analyses presented in this section that generally indicate the positive benefits of proximity to the stadium, combined with the stadium's draw of more than 750,000 people per year (for training camp and regular-season games), it appears as though surrounding land could be leveraged for further development that serves both visitors as well as local residents.

Business Sales near Lambeau Field and throughout Brown County

Next, AECOM examined select businesses to determine their location relative to Lambeau Field.

- For gasoline stations and department stores, businesses surrounding Lambeau Field have average sales per business that are similar to those in Green Bay and Ashwaubenon, but lower than those throughout all of Brown County.
- Average sales per business are significantly higher at full-service restaurants and drinking places within $\frac{3}{4}$ of a mile from the stadium than in other parts of Brown County.
- At limited-service restaurants, sales are higher near Lambeau Field than they are throughout Green Bay and Ashwaubenon, but slightly less than in all of Brown County.

Table 22: Select Businesses near Lambeau Field, 2008

	Gasoline Stations	Department Stores	Full service restaurants	Limited service eating places	Drinking places
Number of businesses					
0-0.75 miles	4	1	20	3	5
Green Bay & Ashwaubenon	44	21	215	32	100
Brown County	42	7	180	23	74
Total	90	29	415	58	179
Sales (thousands)					
0-0.75 miles	\$11,600	\$16,040	\$30,050	\$1,350	\$6,630
Green Bay & Ashwaubenon	\$139,200	\$365,310	\$218,970	\$12,990	\$40,000
Brown County	\$153,580	\$218,700	\$133,930	\$10,890	\$24,320
Total	\$304,380	\$600,050	\$382,950	\$25,230	\$70,950
Average sales per business (thousands)					
0-0.75 miles	\$2,900	\$16,040	\$1,500	\$450	\$1,330
Green Bay & Ashwaubenon	\$3,160	\$17,400	\$1,020	\$410	\$400
Brown County	\$3,660	\$31,240	\$740	\$470	\$330
Total	\$3,380	\$20,690	\$920	\$440	\$400

Source: InfoUSA

Figure 1: Average Sales per Business (thousands), 2008



When looking at the ratio of businesses to population, there is a much higher ratio of these profiled businesses near the stadium than in other parts of Brown County. For example, the four gasoline stations with three-quarters of a mile of the stadium represent 0.6 gas stations for every 1,000 residents living in that area. This compares to a county average of 0.4 gas stations for every 1,000 residents. Within $\frac{3}{4}$ of a mile of Lambeau Field, there are three full-service restaurants for every 1,000 residents. This compares to 1.7 for all of Brown County. For all of the profiled businesses above, there is a much higher per-capita relationship close to the stadium than in other parts of Green Bay and Ashwaubenon, and throughout Brown County, indicating that these businesses are likely benefiting from additional business resulting from visitors to Lambeau Field.

AECOM estimated what the potential loss in sales would be for a full-service restaurant located near the stadium if it generated sales at the same ratio as other Brown County restaurants. Currently, each full-service restaurant outside the Lambeau area and within Brown County generates an average of \$890,000 in sales annually. Those closer to the stadium generate \$1.5 million on average. The difference is \$610,000 per restaurant, or over \$12 million in sales across all full-service restaurants near Lambeau. Combined with the difference in Lambeau-area drinking place revenues, the difference by total sales is between \$15 million and \$20 million.

Hotel Development

AECOM examined data from STR Global (formerly Smith Travel Research), a leading provider of hotel industry data, to examine the location of hotel rooms throughout Green Bay.

- According to STR Global, there are 42 hotels in Green Bay, 6 of which are located within a mile of Lambeau Field. Combined, these six hotels provide 590 rooms, or approximately 15 percent of the total rooms in the area.
- The two upscale hotels near Lambeau Field offer 250 rooms, representing nearly one-quarter (22.8%) of upscale rooms in Green Bay. Although there is only one mid-scale hotel with a full-service restaurant near the stadium, it provides more than one-fifth (22.1%) of equivalent hotel rooms in the city. These types of hotels typically have higher average daily room rates and will therefore generate higher sales tax and hotel tax revenues.

Table 23: Hotels in the Green Bay Area, 2009

Property Name	Chain Scale	Rooms
Near Lambeau Field		
Cambria Suites Green Bay	Upscale	127
Hilton Garden Inn Green Bay	Upscale	123
Best Western Midway Hotel	Mid w/ F&B	145
Days Inn Green Bay West	Economy	78
Roadstar Inn Green Bay	Economy	64
Bay Motel	Independent	53
Green Bay Area		
aloft Hotel Green Bay	Upscale	105
Hotel Sierra Green Bay	Upscale	241
Radisson Hotel & Conf Center Green Bay	Upscale	405
Residence Inn Green Bay	Upscale	96
Holiday Inn & Suites Green Bay Stadium	Mid w/ F&B	118
Holiday Inn Green Bay City Centre	Mid w/ F&B	146
Quality Inn & Suites Green Bay	Mid w/ F&B	99
Ramada Plaza Inn Green Bay	Mid w/ F&B	147
AmericInn Green Bay Howard	Mid w/o F&B	81
Baymont Green Bay	Mid w/o F&B	77
Candlewood Suites Green Bay	Mid w/o F&B	86
Comfort Inn Green Bay	Mid w/o F&B	60
Comfort Suites Green Bay	Mid w/o F&B	115
Country Inn & Suites Green Bay	Mid w/o F&B	75
Country Inn & Suites Green Bay East	Mid w/o F&B	106
Country Inn & Suites Green Bay North	Mid w/o F&B	63
Fairfield Inn Green Bay Southwest	Mid w/o F&B	62
Hampton Inn Green Bay	Mid w/o F&B	114
Wingate By Wyndham Green Bay	Mid w/o F&B	80
Days Inn Green Bay City Center	Economy	98
Econo Lodge Inn & Suites Green Bay	Economy	78
Microtel Inn & Suites Green Bay Ashwaubenon	Economy	68
Motel 6 Green Bay	Economy	103
Super 8 Green Bay	Economy	83
Super 8 Green Bay	Economy	60
Travelodge Green Bay	Economy	102
Airport Settle Inn	Independent	115
Economy Inn	Independent	48
Mariner Motel	Independent	25
North Star Motel	Independent	35
Packer City Motel	Independent	42
Sky Lit Motel	Independent	24
St Brendan's Inn	Independent	28
Tower Motel	Independent	17
The Tundra Lodge	Independent	162
Village Inn	Independent	40

Source: STR Global

V. Surveys of Businesses near Lambeau Field

Businesses identified as those located in the immediate area of Lambeau Field, as well as taverns throughout Brown County, were surveyed in order to better understand their overall satisfaction with the redeveloped stadium and other thoughts related to the redevelopment and Lambeau’s ongoing operation. (Earlier in this report, we address property values of these surrounding businesses.) A total of 428 businesses were successfully contacted by the Packers and the District and were asked to complete an online survey, and 48 responses were received (for a response rate of over 11 percent). The following summarizes and analyzes the overall results of the responses.

General Business Information

The first two questions asked whether respondents represent a restaurant/tavern or retail business, and what their approximate annual sales are. (Note: totals in all surveys’ figures and tables may not add to 100 percent due to rounding.)

Figure 2: Surrounding Businesses – Type of Business

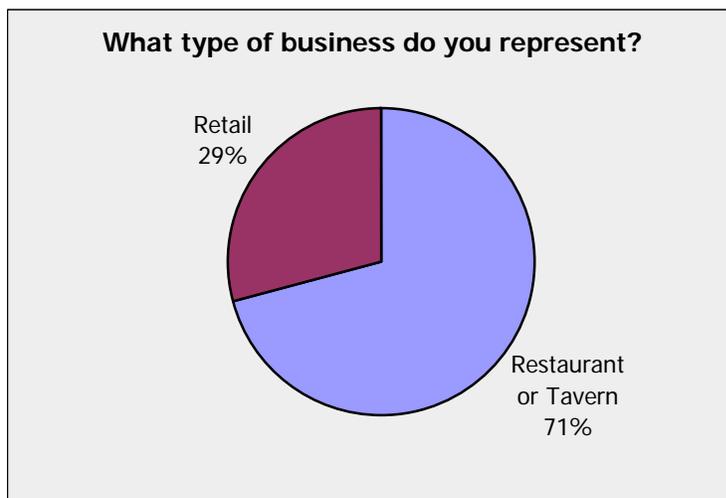
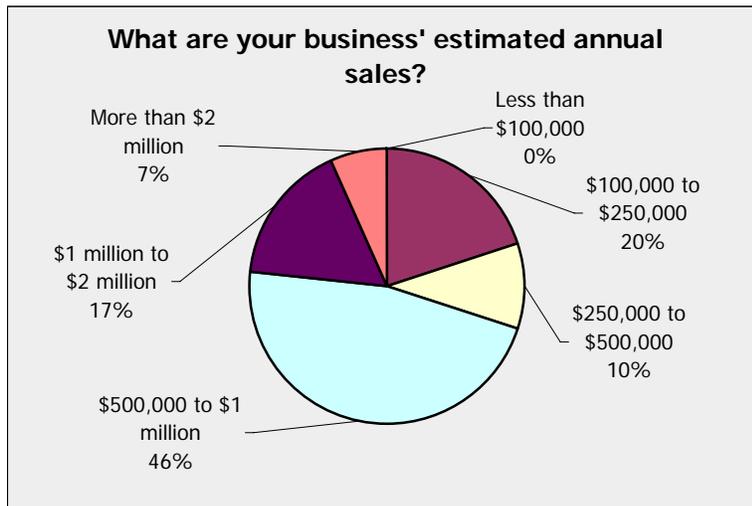


Figure 3: Surrounding Businesses – Estimated Annual Sales



As the graphs show, more than 70 percent of the respondents are restaurants or taverns, and nearly half of respondents have annual sales of \$500,000 to \$1 million.

Impact of Lambeau Field Redevelopment

For those businesses that are still in the same location they were in in 2002 (prior to the redevelopment), we attempted to measure how the redevelopment has affected their business.

First, we measured businesses' current satisfaction in various areas compared to their satisfaction with the stadium prior to redevelopment, without considering broader economic factors that may currently be impacting business.

Table 24: Surrounding Businesses – Satisfaction with Lambeau Field Redevelopment

	Very Satisfied	Satisfied	Neutral/No Change	Dissatisfied	Very Dissatisfied
Ability of customers to access your business	7%	33%	48%	4%	7%
Safety of the immediate area	19%	37%	41%	4%	0%
The impact of the redeveloped stadium on year-round sales	4%	37%	30%	19%	11%
The impact on sales during training camp	4%	41%	37%	7%	11%
The impact on sales on Packers home weekends	4%	41%	41%	11%	4%
The impact on sales on Atrium event days	0%	26%	56%	7%	11%

In all categories, the majority of respondents indicated that they are satisfied in regard to the redevelopment, or have experienced no change. The most positive change in businesses' satisfaction is related to the safety of the area, while at least 40 percent of respondents also indicated satisfaction with the impact on year-round sales, and sales on Packers game days and during training camp.

For these businesses, we then asked about the impact on sales during game/event days compared to non-event days.

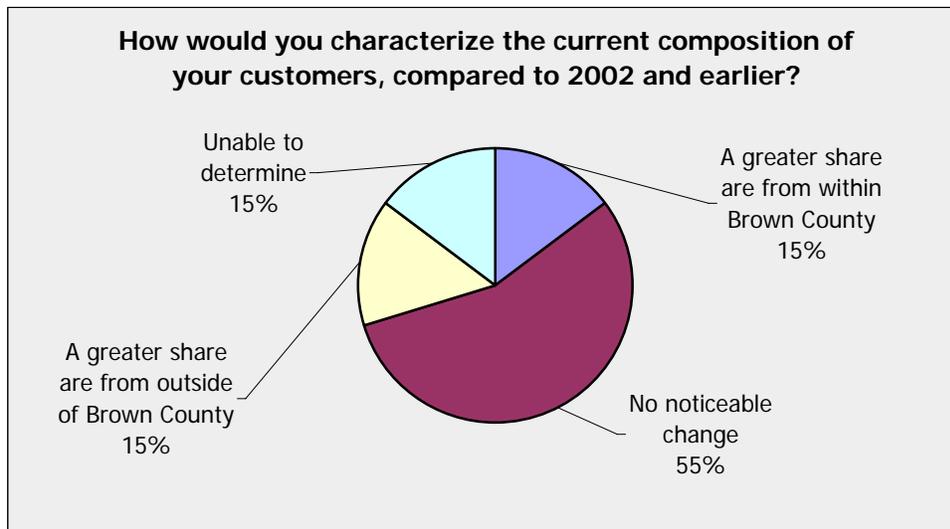
Table 25: Surrounding Businesses – Game/Event Days’ Impacts on Sales

	Decrease of more than 20%	Decrease of 10% - 20%	Decrease of less than 10%	No change	Increase of less than 10%	Increase of 10% - 20%	Increase of more than 20%
Atrium event	15%	11%	4%	52%	15%	4%	0%
Packers training camp	11%	4%	11%	33%	33%	7%	0%
Packers preseason game	19%	11%	4%	33%	15%	19%	0%
"Gold" package home game	15%	15%	7%	19%	22%	19%	4%
"Green" package home game	15%	0%	15%	33%	19%	19%	0%

As expected, nearby businesses benefited the most during Packers games and training camp. During training camp, 40 percent generated sales increases of 10 to 20 percent, while approximately 25 percent experienced decreased sales. For preseason and regular-season games, the results were relatively similar. For Atrium events, more than half of businesses do not experience a change in sales.

We then asked survey recipients to compare the composition of their customers, before and after the redevelopment.

Figure 4: Surrounding Businesses – Composition of Customers



Seventy percent of the respondents indicated that there is no noticeable change in the geographic origin of their customers or they are unable to tell, while the remaining 30 percent were evenly divided between their customers being more local and less local.

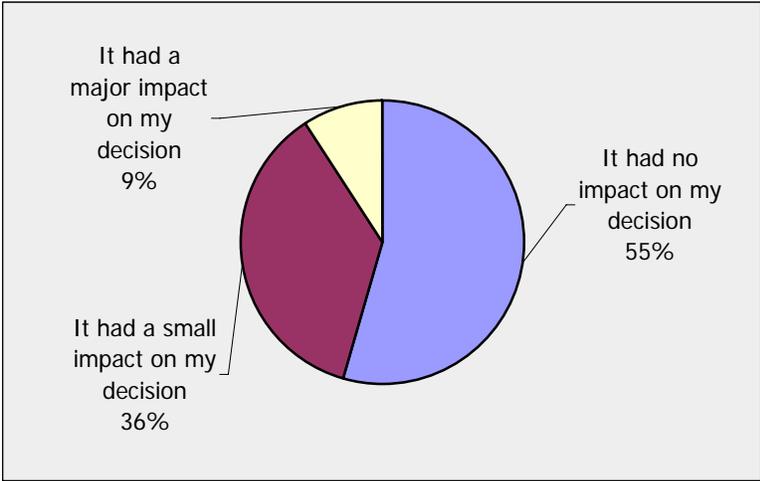
Business Investment (Expansion, Renovation, or Other Improvements)

The next set of questions discussed any major expansion, renovation, or other improvement projects that businesses have undergone since the Lambeau Field redevelopment plan was approved. Of 27

responding businesses that were near the stadium in 2002 and remain in the immediate area, 11 (or 40 percent) indicated that they have invested in a major, non-routine improvement project.

Of these 11 businesses, we then asked how important the Lambeau Field redevelopment was to their decision to invest in their own improvement project.

Figure 5: Surrounding Businesses – Redevelopment’s Impact on Business Investment



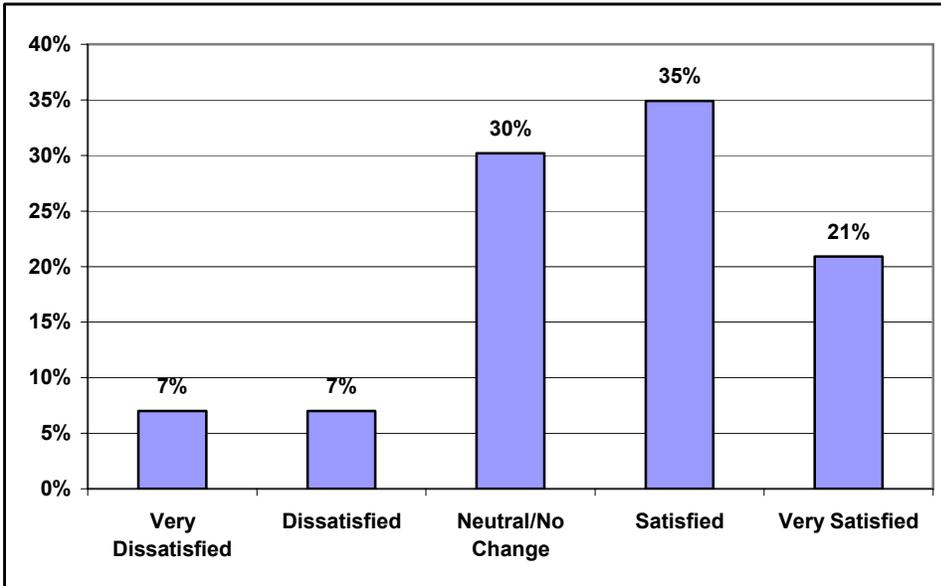
Six, or slightly more than half, of the respondents indicated that Lambeau Field's redevelopment had no impact on their investment. The other five respondents indicated that the redevelopment had a small or major impact on their decision.

The investment in expansion, renovation, or improvement projects made by these businesses totaled approximately \$4.9 million. Of this amount, the responding businesses estimated that 75 percent (or \$3.7 million) was spent on Brown County firms and workers. For the five businesses that indicated that the stadium redevelopment had an impact on their investment decision, the total investment was \$2.8 million, and 91 percent (or \$2.6 million) was spent on Brown County firms and workers.

Overall Satisfaction with the Redeveloped Lambeau Field

All respondents were then asked to measure their overall satisfaction with their proximity to the redeveloped stadium.

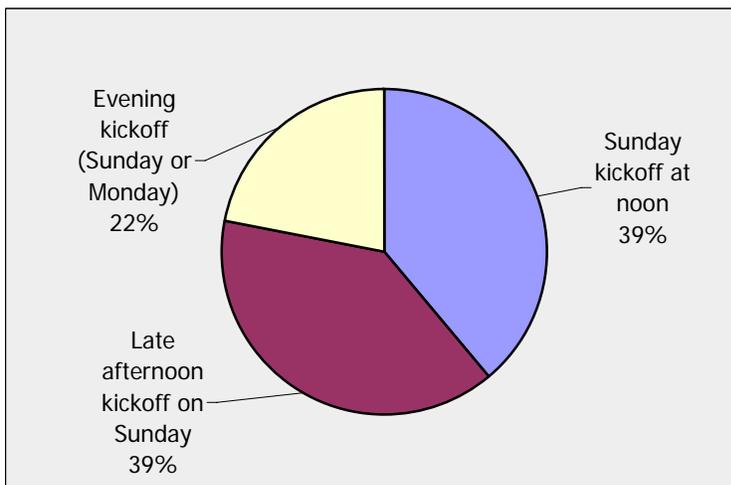
Figure 6: Surrounding Businesses – Overall Satisfaction with Proximity to Redeveloped Stadium



As the graph shows, 56 percent of respondents indicated that they are “satisfied” or “very satisfied” with their proximity to the redeveloped stadium, and only 14 percent indicated any level of dissatisfaction.

We then asked which game day and time creates the greatest benefits to the surrounding businesses.

Figure 7: Surrounding Businesses – Preferred Game Time



Approximately 80 percent of respondents said that noon or late-afternoon Sunday games provide the greatest benefits to their businesses, and the remaining 22 percent prefer Sunday or Monday night games.

Other Input

Respondents were then given the opportunity to provide any other input related to the stadium, its redevelopment, and the Packers. The following summarizes the results.

Positive Feedback

- There is prestige associated with being so close to Lambeau Field.
- The team and game attendees are a great source of added revenue for nearby businesses.
- The UW hockey game generated a surge in revenue, and other similar events should be encouraged.

Negative Feedback

- Game attendees often park in the lots of surrounding businesses, which negatively impacts the ability of customers to reach the business and hurts sales. Traffic in general can also cause customers to stay away on game days.
- Since the redevelopment, so many new restaurants have opened, and this has caused individual restaurants' share of the business to decrease.
- Businesses have lost sales because Lambeau Field and the Atrium can now capture much of the spending that once took place throughout the area. People now have less of a reason to visit businesses outside of the stadium.

VI. Surveys of Local Attractions

We also surveyed local attractions to understand the impact that the redeveloped Lambeau Field has had on their business. A total of 12 attractions were identified and successfully contacted by the Packers and District and asked to complete the online survey, and all provided partial or full responses. The following summarizes and analyzes the overall results of the responses.

General Business Information

The first set of questions asked which type of facility or attraction the respondent represents, and whether it was in operation in 2002 when the stadium was redeveloped.

Figure 8: Local Attractions – Type of Business

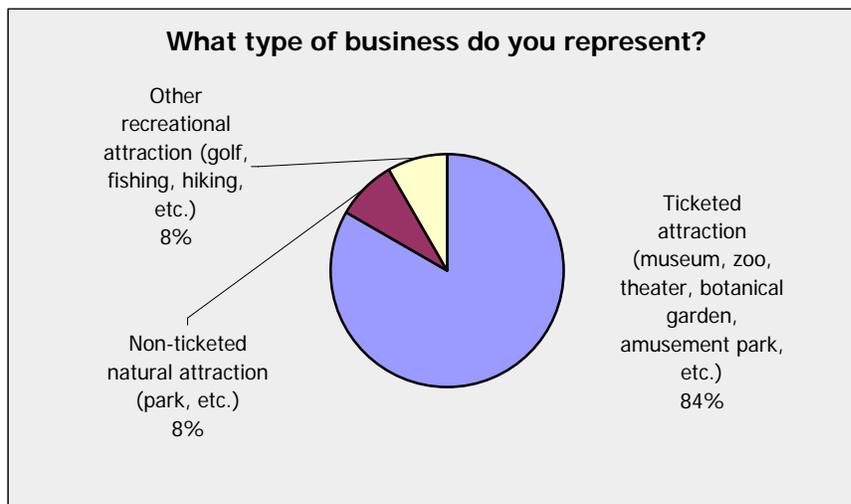
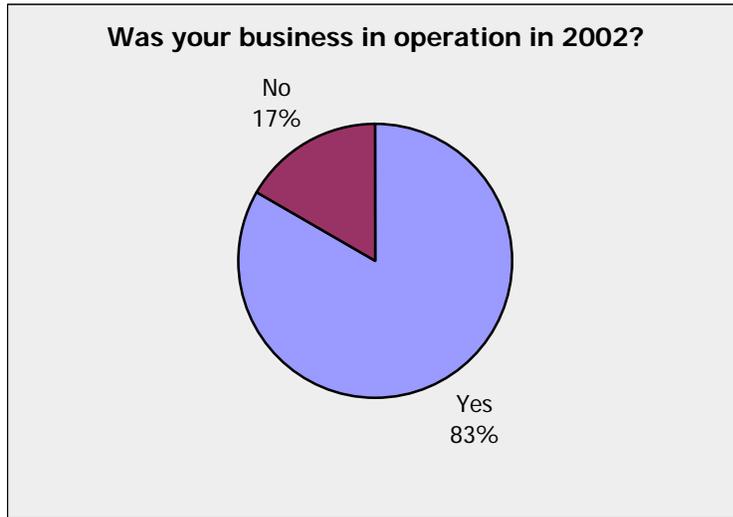


Figure 9: Local Attractions – Length of Operation



As the charts show, most respondents represent ticketed attractions, and most were open in 2002.

Impact of Lambeau Field Redevelopment

For those attractions that were in operation in 2002 (prior to the redevelopment), we attempted to measure how the redevelopment has affected their business.

First, we measured businesses' current satisfaction in various areas compared to their satisfaction with the stadium prior to redevelopment, without considering broader economic factors that may currently be impacting business.

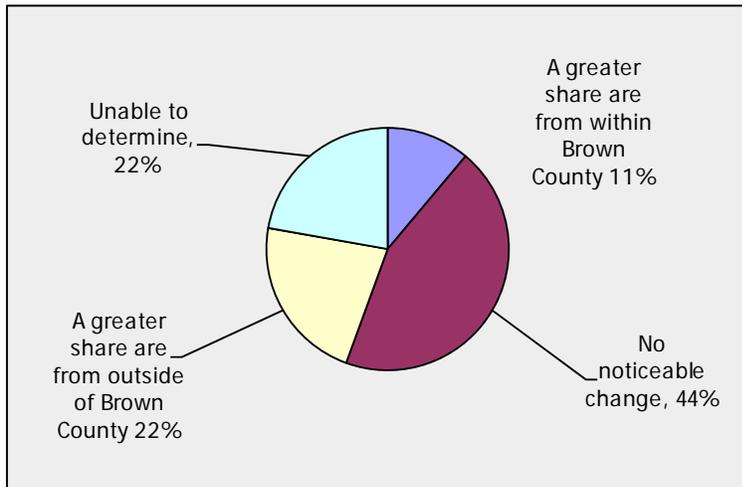
Table 26: Local Attractions – Satisfaction with Lambeau Field Redevelopment

	Very Satisfied	Satisfied	Neutral/No Change	Dissatisfied	Very Dissatisfied	I don't know
The impact on year-round attendance	22%	22%	33%	0%	0%	22%
The impact on year-round sales	33%	11%	33%	0%	0%	22%
The impact on visitation/attendance during training camp	22%	33%	33%	0%	0%	11%
The impact on visitation/attendance on Packers home weekends	33%	22%	33%	0%	0%	11%
The impact on visitation/attendance on Atrium event days	11%	11%	44%	11%	0%	22%
The impact on your ability to book events (such as social or entertainment events)	11%	0%	78%	0%	0%	11%

As the table shows, the vast majority of respondents indicated that they are neutral, satisfied, or very satisfied with the redeveloped stadium's impact on their business. Forty percent or more of respondents said they were at least "satisfied" with the impact on year-round attendance and sales, as well as the impact on attendance during training camp and on Packers home weekends.

We then asked survey recipients to compare the composition of their clientele, before and after the redevelopment.

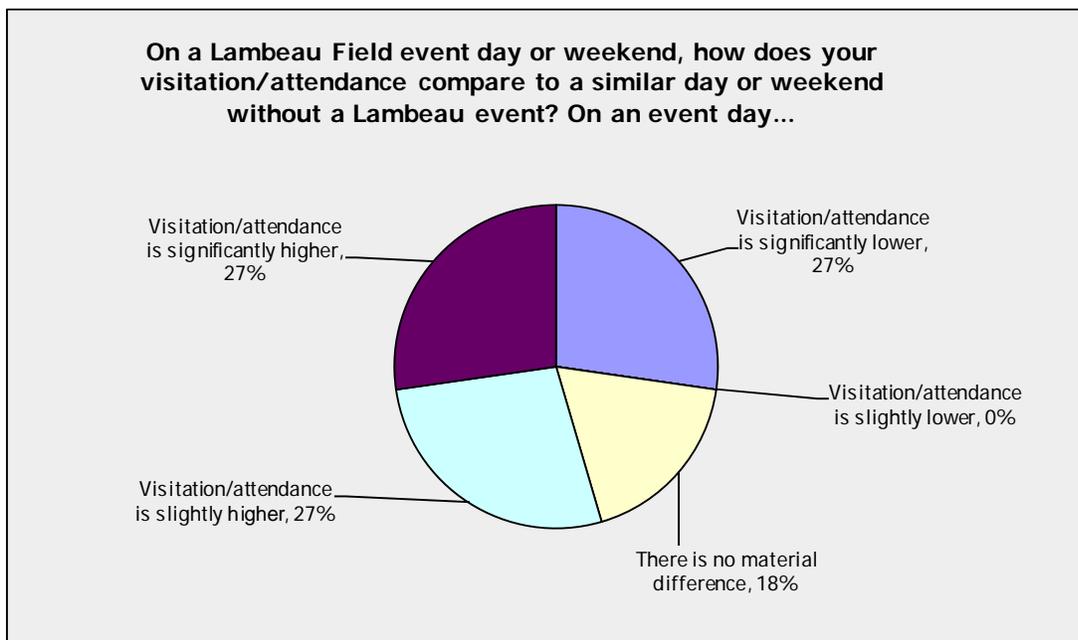
Figure 10: Local Attractions – Changes in Composition of Clientele



More than half of the respondents indicated that they have experienced no noticeable change or are unable to determine a change. However, 22 percent believe that a greater share of their visitors are now from outside of Brown County, while 11 percent believe their visitors are more locally-based.

We then asked whether the facilities' visitation is affected by various types of Packers and Lambeau Field events.

Figure 11: Local Attractions – Game/Event Days' Impacts on Visitation and Attendance

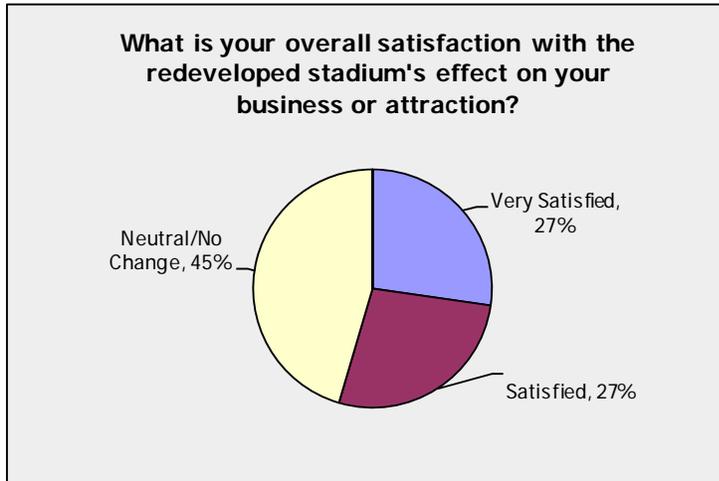


As the chart shows, more than half of the respondents indicated that visitation is slightly or significantly higher on event days and weekends. Approximately one-quarter indicated that visitation is significantly lower.

Overall Satisfaction

All respondents were then asked to comment on their overall satisfaction with the redeveloped stadium.

Figure 12: Local Attractions – Overall Satisfaction with Redevelopment



As the chart shows, more than half of the respondents (55 percent) are satisfied or very satisfied with the redevelopment, while 45 percent indicated that the redevelopment of the stadium has had no effect on their satisfaction.

Other Input

Respondents were then given the opportunity to provide any other input related to the stadium, its redevelopment, and the Packers. Only two responses were received:

- The Packers have exposed a business to people from all over the world, that otherwise would not have occurred.
- One attraction has not been affected specifically by the renovation, but is impacted more by the team's performance and demand for tickets.

VII. Surveys of Local Hotels and Meetings Facilities

We also surveyed hotels (with and without meetings facilities) and local meetings/convention facilities to understand the impact that the redeveloped Lambeau Field has had on their business. A total of 69 businesses were successfully contacted by the Packers and District and asked to complete the online survey, and 26 responses were received (for a response rate of 38 percent). The following summarizes and analyzes the overall results of the responses.

General Business Information

The first set of questions asked which type of hotel/meetings facility the respondent represents, and whether it was in operation in 2002 when the stadium was redeveloped.

Figure 13: Hotels and Meetings Facilities – Type of Business

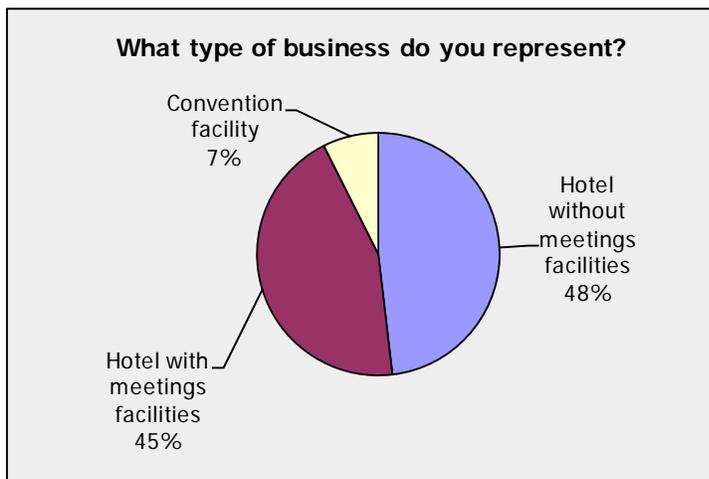
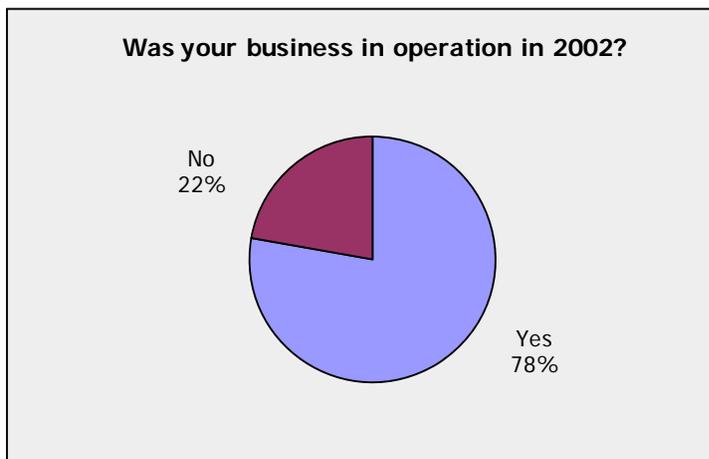


Figure 14: Hotels and Meetings Facilities – Length of Operation



As the charts show, virtually all respondents are hotels, and they are approximately evenly divided between those with and without meetings facilities. More than 75 percent of responding properties were operating in 2002.

Impact of Lambeau Field Redevelopment

For those businesses that were in operation in 2002 (prior to the redevelopment), we attempted to measure how the redevelopment has affected their business.

First, we measured businesses' current satisfaction in various areas compared to their satisfaction with the stadium prior to redevelopment, without considering broader economic factors that may currently be impacting business.

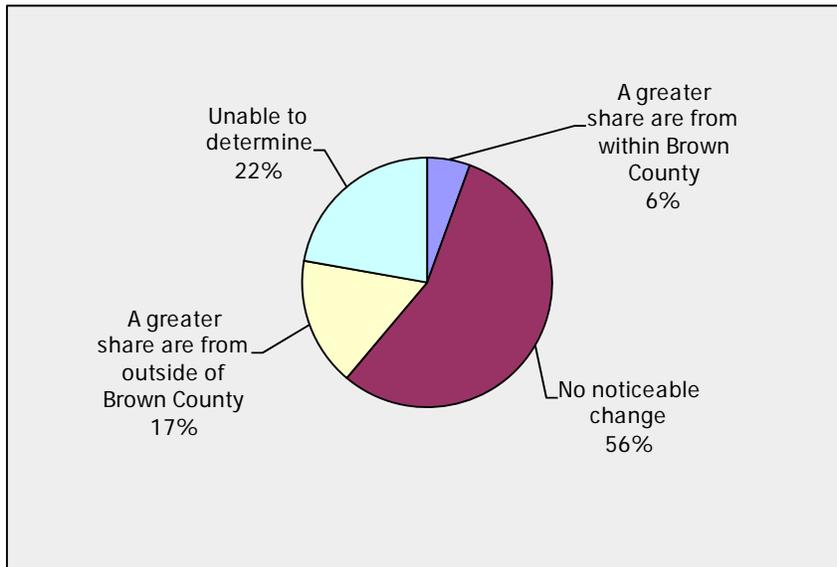
Table 27: Hotels and Meetings Facilities –Satisfaction with Lambeau Field Redevelopment

	Very Satisfied	Satisfied	Neutral/No Change	Dissatisfied	Very Dissatisfied	I Don't Know	Not Applicable
The impact on year-round event visitation or attendance	11%	22%	39%	22%	6%	0%	0%
The impact on year-round event-related sales	6%	17%	33%	39%	6%	0%	0%
The impact on room-night generation	11%	33%	17%	28%	6%	0%	6%
The impact on visitation/attendance on Atrium event days	6%	22%	33%	22%	6%	6%	6%
The impact on visitation/attendance on Packers home weekends	11%	44%	33%	6%	6%	0%	0%
The impact on visitation/attendance during training camp	17%	39%	28%	17%	0%	0%	0%
The impact on your ability to book events	6%	17%	33%	22%	0%	6%	17%

The areas that had the highest levels of satisfaction were the impact on visitation/attendance on game weekends and training camp, and increased room-night generation. The areas that had the highest levels of dissatisfaction were year-round event-related sales and the impact on room-night generation (the smallest share of respondents were neutral on room nights). However, visitation and the associated room nights can be negatively affected by other factors, such as the overall economy and the Packers' record in a given season.

We then asked survey recipients to compare the composition of their clientele, before and after the redevelopment.

Figure 15: Hotels and Meetings Facilities – Composition of Customers



While more than three-quarters of respondents were not able to identify a noticeable change in the geographic origin of their customers, nearly 20 percent indicated that a greater share is now from outside of Brown County.

Impact of Redeveloped Stadium on Events and Attendance

All respondents were then asked to estimate the annual number of events, by type, that they had previously hosted but have since lost to the Atrium (if any).

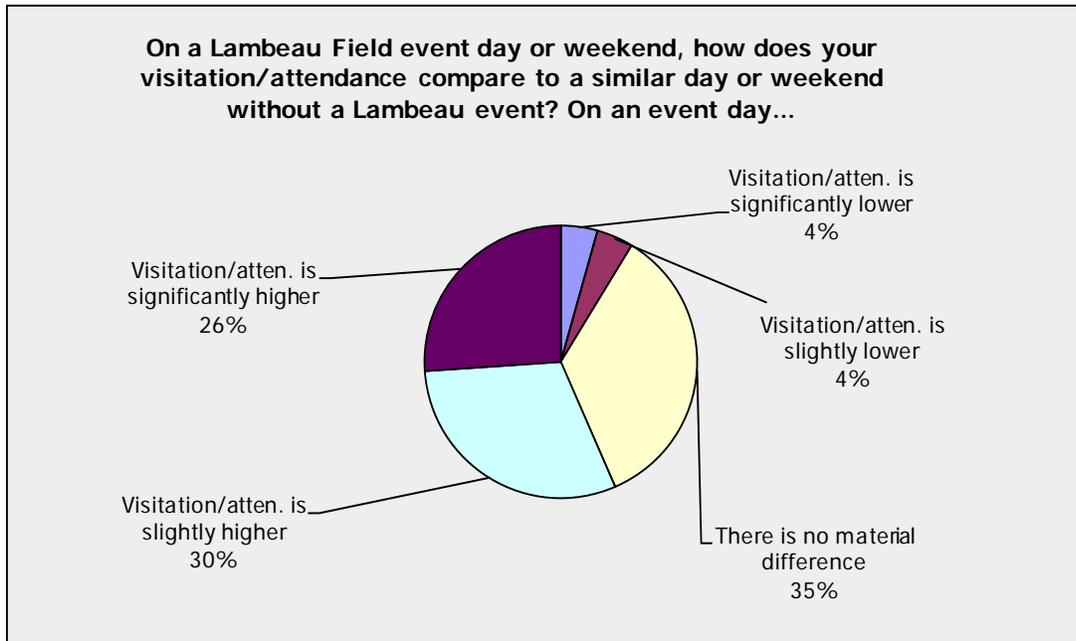
Table 28: Hotels and Meetings Facilities – Loss of Events to the Atrium

	None	1 to 2	3 to 5	6 to 10	More than 10	N/A - We don't host events
Association - National	30%	4%	4%	0%	0%	61%
Association - State	22%	13%	0%	0%	4%	61%
Corporate	22%	13%	9%	0%	4%	52%
Government	43%	4%	0%	0%	0%	52%
Non-Profit	26%	9%	9%	4%	0%	52%
Social	17%	9%	13%	4%	4%	52%

More than half of the respondents to this question do not host events. However, of those that do, the majority indicated that they have not lost events to the Atrium. For the facilities that have lost events to the Atrium, the number of events has been minimal. This indicates that many events held at the Atrium are new to the market, and would not have otherwise been held in Green Bay.

We then asked whether the facilities' event attendance is affected by various types of Packers and Lambeau Field events.

Figure 16: Hotels and Meetings Facilities – Game/Event Days' Impacts on Visitation and Attendance



In general, the majority of facilities (more than 55 percent) indicated that their visitation or attendance is “slightly” or “significantly” higher on Lambeau Field event days or weekends, although approximately one-third does not experience a material difference. The following table analyzes changes based on the type of Lambeau Field event.

Table 29: Hotels and Meetings Facilities – Visitation/Attendance Impact by Type of Lambeau Field Event

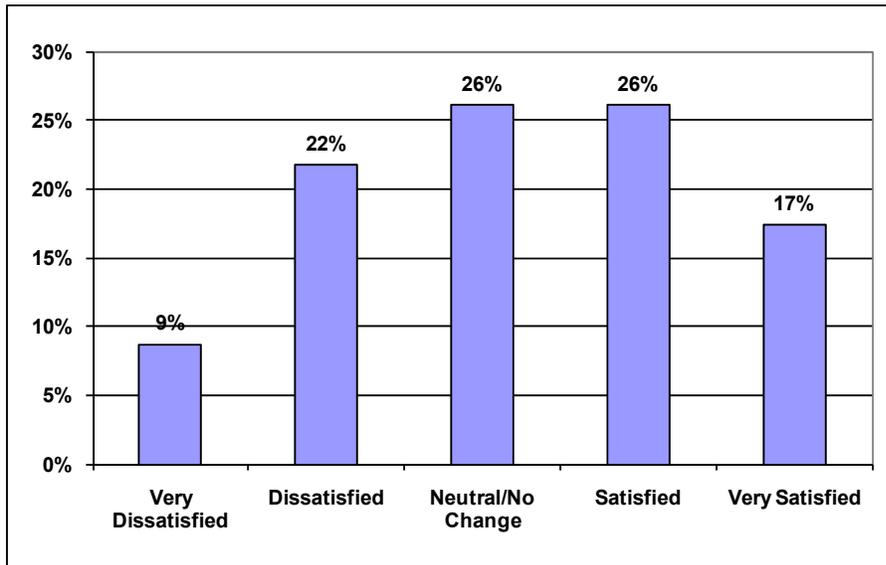
	Decrease of more than 20%	Decrease of 10% - 20%	Decrease of less than 10%	No significant change	Increase of less than 10%	Increase of 10% - 20%	Increase of more than 20%	N/A - We don't host events
Atrium event	4%	0%	4%	35%	9%	4%	4%	39%
Packers training camp	4%	4%	4%	13%	22%	4%	9%	39%
Packers preseason game	4%	4%	4%	13%	17%	0%	17%	39%
Packers regular-season game	4%	4%	4%	17%	9%	0%	22%	39%

According to the survey results, while many of the responding facilities do not host events, the other facilities most frequently experience increases in visitation/attendance on Lambeau Field event days. For Packers training camp, preseason games, and regular-season games, approximately one-third of respondents indicated that they experience an increase in visitation/attendance on stadium event days. For Atrium events, increases are less common, based on the survey results.

Overall Satisfaction

All respondents were then asked to comment on their overall satisfaction with the redeveloped stadium.

Figure 17: Hotels and Meetings Facilities – Overall Satisfaction with Redevelopment



As the graph shows, a total of 43 percent of respondents are “satisfied” or “very satisfied” with the redeveloped stadium, and 31 percent indicated dissatisfaction with the redevelopment.

Other Input

Respondents were then given the opportunity to provide any other input related to the stadium, its redevelopment, and the Packers. The following summarizes the results.

- Multiple respondents indicated that they would like to see more non-Packers events at Lambeau Field, particularly those that bring in non-local residents.
- Business has decreased since the redevelopment, as the Atrium now competes with other meetings facilities and their food and beverage functions. Also, with the addition of new hotels and restaurants, everyone’s share of the pie is smaller.

VIII. Other Local Impacts Related to Business Growth, Attraction, Retention, and Marketing

In addition to the previous surveys that quantified various impacts felt by local businesses from the redevelopment and ongoing operation of Lambeau Field, this study also addresses other related impacts experienced by both businesses and the public sector. These impacts include the role that the presence of the Packers and Lambeau Field play in the business-attraction and other marketing efforts led by public agencies, the impact of the team on the local “brand,” benefits captured by other businesses that were not addressed in the previous surveys, and others.

Some of the impacts discussed in this section are more difficult to quantify than other impacts, and are therefore presented as anecdotal and qualitative impacts, in addition to survey results.

Survey Results

A limited number of local businesses were identified and surveyed related to their decision to locate in Brown County. A total of 13 responses were received.

Figure 18: Business Attraction – Type of Business

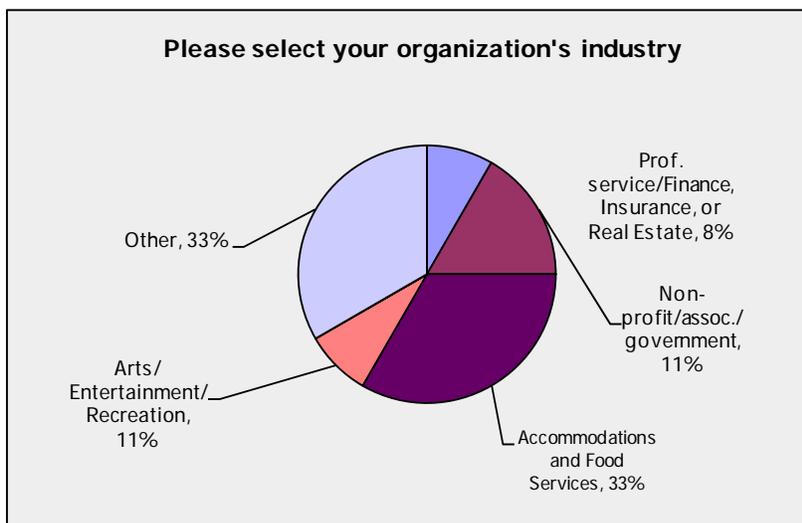
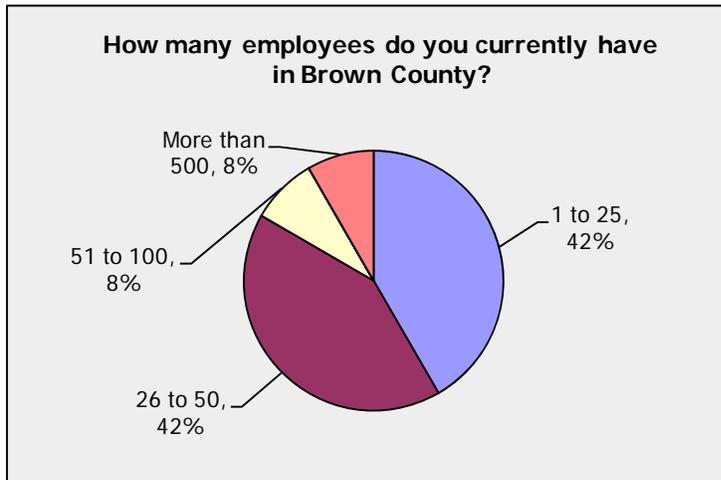


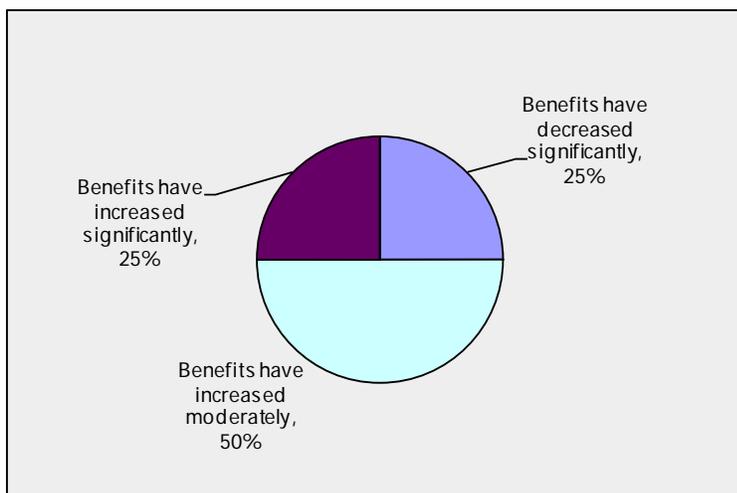
Figure 19: Business Attraction – Number of Employees



The responding businesses are in a number of industries, and more than 80 percent are relatively smaller businesses, with 50 or fewer employees.

Six of the respondents indicated the year that their business opened in Brown County. Responses ranged from 1987 to 2006, with an average of 1998. Businesses were also asked whether they considered other locations; five respondents did not consider other locations, and one considered another location in central Wisconsin. For those businesses that have been in Brown County since at least 2002, they were asked to compare the benefits they currently receive to those prior to Lambeau Field’s redevelopment.

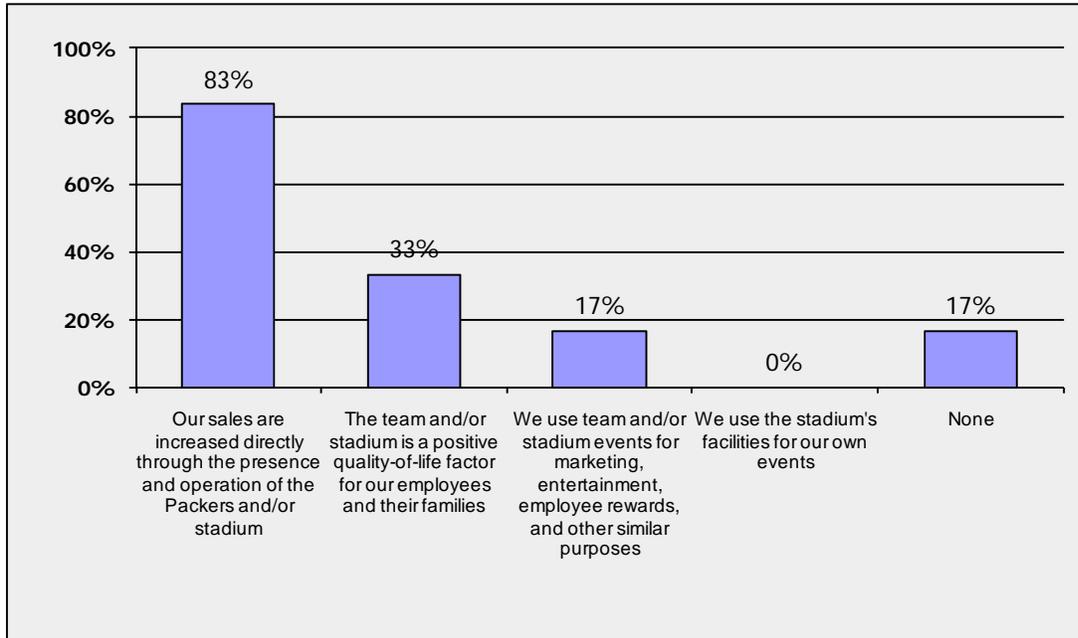
Figure 20: Business Attraction – Benefits from Redeveloped Lambeau



Half of the respondents (of a small sample set) said that the benefits their business receives have increased moderately since Lambeau has been redeveloped, while one-quarter’s benefits have increased significantly and one-quarter’s benefits have decreased significantly.

The following question then asked respondents to identify the specific benefits that their businesses receive (more than one response per business was allowed).

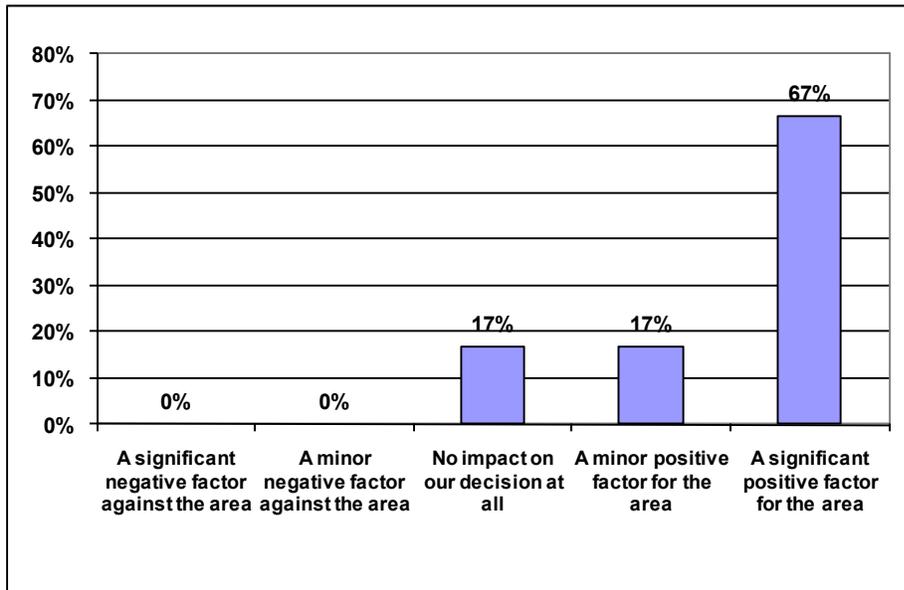
Figure 21: Business Attraction – Specific Benefits Received



More than 80 percent of respondents indicated that their business receives increased sales through the presence of the Packers and Lambeau Field, and respondents also cited the team and stadium's quality of life benefits and use of the facility for business purposes.

All recipients were then asked what role the presence of the Packers and Lambeau Field had in their decision to locate in Brown County.

Figure 22: Business Attraction – Impact of Packers and Lambeau in Location Decision



As the chart shows, the majority of respondents indicated that the team and stadium were a significant positive factor in their decision to locate in Brown County. None of the respondents believed that the Packers and Lambeau Field were a drawback to the area.

Other Associated Impacts

- Beyond the surveys discussed above, individual businesses also communicated thoughts related to their location:
 - One bar and grill opened near Lambeau Field within the last three years. According to its owner, being near the stadium was very important to him, and if he wasn't able to secure land near Lambeau Field, he probably would not have opened the business at all.
 - A hotel that is within walking distance of Lambeau Stadium explicitly wanted to be near the stadium. While Packers home weekends are not enough to support a hotel year-round, the property (which opened in late 2007) also wanted to be near the stadium because of the Atrium events that bring other visitors to town.
- According to economic development officials with the City of Green Bay and Village of Ashwaubenon, the Packers are generally the foremost local asset that is used in marketing efforts for business recruitment, and the team is featured heavily in marketing materials.
- In addition, it is recognized that the Green Bay brand/image is largely a result of the Packers, and this is taken advantage of whenever possible. People associate Green Bay with winning (i.e.

"Titletown"), and the image and association brings opportunities to the Green Bay area that markets of similar size don't have.

- The team and stadium have led to increased investment in local hotels and restaurants, and the Atrium has provided a unique event space for both local residents and visitors that did not previously exist (many of these benefits are captured in the survey results).

The impacts generated by the Packers and Lambeau Field are primarily felt in the hospitality industry, due to the visitors that come to town for games and other team/stadium events. Businesses that serve the visitor and hospitality industry have reported various benefits, in addition to those quantified in the surveys. For example, one company provides transportation for Packers games and Atrium events, and many of its groups originate from out of town. Other businesses in the visitor industry also capture increased business due to the use of Lambeau Field.

IX. Other Potential Impact-Generating Events

This section reviews non-Packers events that have been held at Lambeau Field in the past, events that have been held at other similar stadiums, and potential opportunities for the stadium to generate additional economic impacts from other events.

Past Non-Packers and Non-Atrium Events at Lambeau Field

Previous sections of this report analyzed in detail the events held at Lambeau Field in 2009 (training camp, Packers' preseason and regular-season games, and Atrium events) and their associated impacts. The construction of the Atrium has allowed the stadium to host a wider range of events on a year-round basis; however, the stadium field has not hosted many non-Packers events over the years. Examples of on-field events include a University of Wisconsin-Ohio State University hockey game (with approximately 41,000 attendees) and snowmobile racing, which was held in the parking lot in 2004 and inside the stadium in 2005 and 2006. Also, and a religious conference (Leap of Faith) used the stadium seating but not the field. This May, "LZ Lambeau" was billed as the redeveloped stadium's biggest non-Packers and non-sports event, and attracted approximately 70,000 people to the Green Bay area over three days, including more than 26,000 at the keynote ceremony at Lambeau Field. LZ Lambeau's Honor Ride included 1,244 motorcycles that traversed the state (beginning in La Crosse) and ended at Lambeau Field.

A limited amount of information related to the economic impacts of these events is available. The Greater Green Bay CVB estimated the impact of a Snocross race as approximately \$400,000, and \$4.5 to \$5 million for LZ Lambeau (in addition to approximately 5,300 local hotel room nights). In addition, according to event representatives, the UW hockey game had a "regional" draw with attendees coming from throughout Wisconsin, and a limited number from Ohio.

Events Held at Other Similar Stadiums

Across the country, many football and baseball stadiums focus on hosting events other than their tenants' games, both on and off the field. The ability to host events throughout the year is partially dependent on climate and the presence of indoor facilities (such as the Atrium or a domed stadium), as well as variables such as ownership/management structure and market characteristics; however, many facilities have been aggressive and successful in hosting events such as college and high school football games, concerts, other sporting events, and other events.

Multiuse Stadiums

In the NFL, a number of new stadiums have recently been built with the explicit intent of being year-round, multipurpose facilities. Prime examples are University of Phoenix Stadium in Glendale, Ford Field

in Detroit, Lucas Oil Stadium in Indianapolis, Cowboys Stadium in Arlington, and Reliant Stadium in Houston. Similar to Lambeau Field's Atrium, these stadiums all have indoor, off-the-field facilities that can host events such as meetings, banquets, and conventions. Their fields have also hosted a wide range of events, such as concerts and family shows, basketball and hockey games, and truck rallies.

However, most importantly, these newer venues have a number of advantages that Green Bay and Lambeau Field do not have, including technology that allows the playing field to be removed from the stadium floor or the ability to scale down to a smaller capacity, private management that benefits from its industry connections and greater interest in taking financial risk, and design plans that specifically considered the needs of other event types. In addition, each of these facilities is domed. Despite the many differences between Lambeau Field and these recently-built NFL stadiums, there are still many potential opportunities to host other events, as other stadiums (many of which are older, open-air facilities and/or located in cold-weather climates) have shown.

Event Promotion

An additional factor in a facility's willingness to host additional events is its ownership and management structure. In Green Bay, Lambeau Field is publicly owned by the District and City, and is leased by the Packers. The City/District have the right to use the seating bowl, common areas, and playing field. Although the City/District have scheduling priority from February 1 to May 15 and can use the complex from February 1 through June 30, the Packers have the right to deny use of the stadium if they determine that usage:

1. Presents an unacceptable public safety risk or an unacceptable risk of damage to the Lambeau Field complex, including the playing field,
2. Is incompatible or inconsistent with any sponsorship or promotional arrangement of the Packers,
3. Would violate NFL rules relating to the public image of a team, or
4. Would interfere with the preparation for, set up, or conduct of other team uses and events or special events at the Lambeau Field complex.

In the past, the Packers have been flexible in this area and have allowed the District to use the stadium bowl outside of its priority scheduling period (the Leap of Faith was held in July and LZ Lambeau was in late May).

Also, under the terms of the lease, the District does not have the right to use of premium seating (i.e. indoor/ outdoor club seats and private boxes). Revenue from these seats would help to make an event more financially viable for the District and/or a promoter. However, the Packers have also been flexible regarding this issue. For example, for the Snocross event, the team and District agreed to share club seat and private box revenues with the promoter.

Under a number of ownership/management structures, facilities have been able to host major non-tenant events on the playing field – most often when the risk-taking entity is a private company such as the team or private facility manager. (The Packers served as promoter of the Wisconsin hockey game.) Rather than simply rent a facility to a promoter, a number of teams have begun to act as the promoter by purchasing an event and becoming the promoter (or sharing risk by being a co-promoter). Examples include Kenny Chesney concerts in 2008 that were promoted by team or facility owners at M&T Bank Stadium, Browns Stadium, University of Phoenix Stadium, AT&T Park, Heinz Field, Lincoln Financial Field, Gillette Stadium, and Ford Field. In recent years, Chesney has been perhaps the most consistent stadium act, having also played at NFL stadiums such as Qwest Field, Raymond James Stadium, Soldier Field, LP Field, FedEx Field, and Lucas Oil Stadium, as well as major college football stadiums (in Louisville, Columbia [South Carolina], and Baton Rouge), motor speedways, and MLS and MLB stadiums.

While the potential to generate profits increases by promoting a show, so does the potential to lose money if ticket sales don't reach anticipated levels. In Glendale, the public-sector Arizona Sports and Tourism Authority promoted its Chesney concert but relied on stadium manager Global Spectrum for marketing, and in Indianapolis, the Capital Improvement Board that owns Lucas Oil Stadium decided not to take any risk and simply rented the stadium to Chesney's promoter. (An additional incentive for NFL teams to host these events is their ability to keep the associated revenues out of the leaguewide revenue-sharing pool.)

Event Demand at Other Stadiums

In this section, we discuss events that have recently been held at other current and former NFL stadiums, NCAA stadiums, and Major League Baseball (MLB) stadiums, with a focus on major, on-field events that could potentially be held at Lambeau Field (not including events such as basketball games that would be infeasible in Green Bay).

Concerts

Concerts are among the most common events held on stadium fields, although the number of stadium concerts is limited, as most acts are not able to sell 40,000 to 90,000 tickets for a single show. Based on a review of event demand at current and past NFL stadiums, the vast majority of facilities have hosted concerts, although some more than others. Due to factors such as their market, climate, aggressiveness of ownership/management, and facility design, NFL stadiums such as Sun Life Stadium, the former Giants Stadium, Gillette Stadium, and Heinz Field have been particularly active in the concert market, with multiple concerts in a typical year. Demand at other selected NFL stadiums that may be more relevant to Green Bay and Lambeau Field is as follows:

- Open-air stadiums in colder climates (such as Gillette Stadium, Heinz Field, Invesco Field, Soldier Field, FedEx Field, and Paul Brown Stadium) have all hosted 10 or more concerts in the last 10 years. Former NFL stadiums that are still in operation, such as RFK Stadium and the Los

Angeles Memorial Coliseum, have also hosted a limited number of concerts. The performers at these facilities were primarily top-tier acts such as U2, the Rolling Stones, the Dave Matthews Band, Kenny Chesney, Paul McCartney, and Bruce Springsteen, or festivals with a number of bands. (In the summer of 2010, multiple NFL stadiums, including Soldier Field, Paul Brown Stadium, and Gillette Stadium, are hosting festivals.)

- At these facilities, ticket demand has generally been significant. According to Pollstar, concerts at NFL stadiums (for which data is available) have had the following characteristics (as of June 2010):

Table 30: Ticket Demand and Sales from Concerts at Selected NFL Stadiums

Stadium	Market	Year Stadium Opened	Type of Stadium	# of Concerts	Average Atten.	Avg. Gross Ticket Sales
Sun Life Stadium	Miami	1997	Open Air	35	47,051	\$5,615,890
Gillette Stadium	Boston	2002	Open Air	34	55,614	\$5,010,565
Louisiana Superdome	New Orleans	1975	Dome	30	n/a	n/a
Heinz Field	Pittsburgh	2001	Open Air	22	46,640	\$4,097,581
LP Field	Nashville	1999	Open Air	17	19,493	\$1,181,358
Invesco Field at Mile High	Denver	2001	Open Air	14	20,127	\$613,284
Soldier Field	Chicago	2003*	Open Air	13	42,840	\$3,756,271
FedEx Field	Washington DC	1997	Open Air	12	84,754	\$6,718,314
HHH Metrodome	Minneapolis	1982	Dome	12	n/a	n/a
Georgia Dome	Atlanta	1992	Dome	12	61,419	\$5,746,429
Paul Brown Stadium	Cincinnati	2000	Open Air	11	n/a	n/a
Raymond James Stadium	Tampa	1998	Open Air	10	38,829	\$3,305,144
Cowboys Stadium	Dallas	2009	Retractable	10	53,122	\$4,863,790
Qwest Field	Seattle	2002	Open Air	9	33,535	\$2,327,372
Candlestick Park	San Francisco	1960	Open Air	8	n/a	n/a
Ford Field	Detroit	2002	Dome	8	43,418	\$3,570,956
Lincoln Financial Field	Philadelphia	2003	Open Air	6	51,083	\$4,306,721
Oakland-Alameda County Coliseum	Oakland	1966	Open Air	6	44,970	\$4,256,643
Lucas Oil Stadium	Indianapolis	2008	Retractable	6	47,853	\$3,425,986
Meadowlands Stadium	New York	2010	Open Air	6	49,048	\$4,186,932
Arrowhead Stadium	Kansas City	1972	Open Air	5	n/a	n/a
Ralph Wilson Stadium	Buffalo	1973	Open Air	4	n/a	n/a
Browns Stadium	Cleveland	1999	Open Air	3	44,785	\$3,446,988
* Renovation.						
Source: Pollstar, AECOM						

MLB stadiums have also become popular destinations for major concerts in recent years (often during baseball season); the majority of its facilities have hosted concerts, including Miller Park and older stadiums such as Wrigley Field and Fenway Park. Wrigley Field and Fenway Park, in particular, have become active in the summer concert market in recent years, in order to help generate revenues at older stadiums that have relatively limited options in other areas. However, the two facilities are among MLB's smallest. Acts that have toured MLB stadiums in recent years are often the same that have played at football stadiums, and include Bruce Springsteen, Jimmy Buffett, the Rolling Stones, The Police, the Dave Matthews Band, Paul McCartney, Madonna, and Kenny Chesney.

Other relevant information related to major concerts at football and baseball stadiums is as follows:

- The US legs of U2's 2009 and 2010 tours were primarily scheduled at NFL and NCAA football stadiums. (This May, the 2010 shows were rescheduled for 2011 due to an injury to Bono, the band's lead singer.) The NCAA stadiums included older facilities in relatively smaller markets such as Charlottesville, Virginia; Raleigh, North Carolina; Norman, Oklahoma; and East Lansing, Michigan. The Norman concert, at the University of Oklahoma, reportedly generated \$500,000 to the facility in rent. Shows in Charlottesville and Raleigh were sellouts in 2009, with 52,000 to 55,000 tickets sold. (East Lansing's Spartan Stadium was scheduled to host U2 in June 2010.)

U2's Fall 2009 shows in the US included 14 performances at nine NFL stadiums across the country; all shows were sold out, with per-show ticket sales ranging from 58,000 to 85,000.
- In addition to the canceled U2 shows, NFL and MLB stadium tours in the summer of 2010 include the Eagles with the Dixie Chicks and Keith Urban (Toronto, the Meadowlands, Boston, Philadelphia, Chicago, and St. Louis), Bon Jovi (Toronto, Boston, Chicago, and the Meadowlands), Jay-Z and Eminem (Detroit and New York), and the Dave Matthews Band (New York, Pittsburgh, Chicago, and Washington DC).
- In terms of economic impacts, last year's opening of Cowboys Stadium was kicked off by a number of concerts, including a George Strait show in June. According to local officials, at least 80 percent of Arlington's hotel rooms were booked the weekend of his show, for a total of 4,000 room nights.
- Two new outdoor stadiums – TCF Bank Stadium and Target Field – are expected to attract major outdoor concerts to Minneapolis for the first time in many years, which could help similar facilities in Wisconsin to host the events as they tour the region. TCF Bank Stadium, at the University of Minnesota, was to host U2 this June (prior to the East Lansing show), and the show was an immediate sellout (approximately 58,000 tickets).

Other concerts are expected at the two stadiums in the future. According to reports, the university has been contacted by numerous promoters who are interested in using TCF Bank Stadium, and according to the Twins, they plan to begin attempting to book concerts at Target Field after 2010, the stadium's first year.

For additional context on concert demand at major stadiums, the following table lists US and Canadian stadiums that were among the top 100 worldwide outdoor stadiums and festival sites for concert ticket sales in 2009 (including stadiums with retractable roofs).

Table 31: Top Outdoor Stadium and Festival Sites by Ticket Sales, 2009

Rank	Facility	City	Primary Pro Sports Tenant	# of Tickets Sold
2	Meadowlands Sports Complex*	E. Rutherford, NJ	NFL	585,282
10	Rogers Centre**	Toronto, ON, CA	MLB	261,033
11	Gillette Stadium	Foxborough, MA	NFL	248,702
19	Soldier Field	Chicago, IL	NFL	184,635
23	Fenway Park	Boston, MA	MLB	168,747
24	Reliant Stadium**	Houston, TX	NFL	168,043
25	Cowboys Stadium**	Arlington, TX	NFL	166,857
30	Hersheypark Stadium	Hershey, PA	n/a	133,265
39	Wrigley Field	Chicago, IL	MLB	114,020
41	Citi Field	New York, NY	MLB	109,541
42	Crew Stadium	Columbus, OH	MLS	103,566
46	Comerica Park	Detroit, MI	MLB	98,187
48	Rose Bowl	Pasadena, CA	NCAA	97,014
53	Commonwealth Stadium	Edmonton, AL, CA	CFL	89,748
54	Citizens Bank Park	Philadelphia, PA	MLB	89,690
59	FedEx Field	Landover, MD	NFL	84,754
66	Raymond James Stadium	Tampa, FL	NFL	72,688
68	Pizza Hut Park	Frisco, TX	MLS	71,650
72	Toyota Park	Bridgeview, IL	MLS	66,009
78	Carter-Finley Stadium	Raleigh, NC	NCAA	55,027
83	Scott Stadium	Charlottesville, VA	NCAA	52,433
84	Lincoln Financial Field	Philadelphia, PA	NFL	52,343
85	Oklahoma Memorial Stadium	Norman, OK	NCAA	50,951
86	University of Phoenix Stadium**	Glendale, AZ	NFL	50,775
91	Rio Tinto Stadium	Sandy, UT	MLS	49,106
92	Heinz Field	Pittsburgh, PA	NFL	47,510
98	Lucas Oil Stadium**	Indianapolis, IN	NFL	45,178
* Includes Giants Stadium (NFL) and IZOD Center (NBA).				
** Facility has a retractable roof.				
Source: Pollstar				

As the table shows, a number of NFL stadiums are among the top 100. Some stadiums on the list (such as Carter-Finley Stadium, Scott Stadium, and Oklahoma Memorial Stadium) made the list on the basis of one U2 show.

Stadiums have also hosted a number of smaller concerts and festivals that use parts of the seating bowl or other elements of the facility site, such as parking lots, tailgate areas, practice fields, and others. In addition, Soldier Field has a “Stadium Green” that is used for events such as smaller concerts. Also, in April 2010, the MLB San Diego Padres announced plans for a summer (in-season) concert series at its Petco Park. The 43,000-seat stadium would be reduced to approximately 6,000 seats located on the playing field and in the historic Western Metals Building that was incorporated into the stadium’s seating design, and the team is considering using temporary “fog” walls to frame the stage and seating area. In

the past, Petco Park has hosted full-stadium acts such as Madonna and the Rolling Stones, with the Padres assuming no financial risk. For the concert series, the team hired its own talent buyer and will act as promoter.

According to interviews with event promoters and other industry professionals, major concert acts have shown interest in performing at Lambeau Field over the years, but no deals have been finalized. The District and Packers, in cooperation with a local promoter, have continued to work toward bringing a major concert to Lambeau Field. In December 2007, a stadium tour was given to a production company to assess the feasibility of a concert at the facility. While the production company concluded that Lambeau could successfully host a concert, field protection was a major concern for the Packers and became an obstacle in securing approval from the team for a concert.

In September 2009, the District worked with the Packers to implement an evaluation of field protection systems by installing several vendor products on the practice field. Results were positive and appeared to provide the District and team with a level of confidence regarding their effectiveness. As a result, an offer was extended to a major act to hold a concert at Lambeau in June 2010. Ultimately, the event was not held, as an agreement could not be reached with the artist. However, the District and team continue to work with a local promoter to attract a major concert to Lambeau, and this July, another production company toured the facility and it appears as though the chances for a concert to be held in 2011 are very good.

College Football Games

In recent years, colleges and universities have increasingly been scheduling games at neutral-site stadiums for various reasons, including the ability to potentially sell more tickets and generate additional revenue, reach a broader base of supporters, and play in marquee facilities. Similar to concerts, a facility owner can act as a game's promoter or simply rent the stadium to the participating schools. Regular-season games would be most likely for Lambeau Field, although the Big 10 has recently added a conference championship game beginning in 2011 (the first game will be held at Indianapolis' Lucas Oil Stadium). Also, a new bowl (the New Era Pinstripe Bowl) will be played at New York's Yankee Stadium beginning this year, although New York's market size and its holiday tourist draw are key differences compared to Green Bay.

The District and Packers have explored bringing college football to Lambeau Field in the past. The Packers offered to host a Wisconsin-Northern Illinois game in 2009, but the game will be held at Soldier Field in 2011. Also, the District worked with a promoter to evaluate a possible Rice-Southern Mississippi game in 2008, although the District ultimately determined that the game would have been financially infeasible. More recently, discussions regarding a potential Michigan Tech game have been held, and this remains at possibility in the long run.

The following summarizes information related to neutral-site college football games:

- In the 2009 season, a number of NCAA Football Bowl Subdivision (FBS) games (many with elite teams) played neutral-site regular season games in NFL stadiums and other large football stadiums across the country. (The FBS was formerly known as Division I-A.) The following table summarizes the higher-profile games played in these larger facilities.

Table 32: 2009 Neutral-Site NCAA FBS Games

Teams	Stadium, City	Notes
Virginia Tech - Alabama	Georgia Dome, Atlanta	Annual location of Chick-fil-A Kickoff Game
Miami (OH) - Kentucky	Paul Brown Stadium, Cincinnati	
Ohio State - Toledo	Browns Stadium, Cleveland	
Arkansas - Texas A&M	Cowboys Stadium, Dallas	Game will played in Dallas for 10 years
BYU - Oklahoma	Cowboys Stadium, Dallas	
Oklahoma - Texas	Cotton Bowl, Dallas	Annual location of Red River Shootout game
Florida - Georgia	Alltel Stadium, Jacksonville	Annual location of game
Iowa State - Kansas State	Arrowhead Stadium, Kansas City	Two-year agreement for '09 and '10
Army - Navy	Lincoln Financial Field, Philadelphia	Through '17, games in Phi, FedEx Field, and M&T Bank Stadium
Notre Dame - Washington State	Alamodome, San Antonio	
Hawaii - Washington State	Qwest Field, Seattle	
Illinois - Missouri	Edward Jones Dome, St. Louis	Common location of annual Arch Rivalry game
Source: NCAA, AECOM		

In addition to the games listed above, there are many “classics” that are played between historically black colleges and universities at neutral sites, many of which are NFL stadiums such as Soldier Field, Lucas Oil Stadium, and Giants Stadium, as well as others such as Legion Field (Birmingham), the Cotton Bowl (Dallas), the Citrus Bowl (Orlando), and the Liberty Bowl (Memphis). These games often include weekend- or week-long festivities such as battles of the bands, parades, reunions, and other events. However, the existing classics are held in the same city and facility each year and would generally not be considered candidates to relocate. In contrast, some of the games listed above are one-time events but similar matchups recur across the country on an annual basis. Other non- FBS games also take place at NFL stadiums, such as the annual Wells Fargo Battle in Seattle, played at Qwest Field between Central Washington and Western Washington. Qwest Field also hosted an Eastern Washington-Portland State game in 2009.

A number of NFL stadiums are also the full-time home of college football programs: Heinz Field (University of Pittsburgh), Lincoln Financial Field (Temple University), Qualcomm Stadium (San Diego State University), LP Field (Tennessee State University), the Louisiana Superdome (Tulane), Sun Life Stadium (University of Miami), and Raymond James Stadium (University of South Florida). Before the recent opening of TCF Bank Stadium in Minneapolis, the Metrodome also hosted the University of Minnesota, in addition to the Vikings.

- Examples of past and future regular season neutral-site games have shown the actual and planned impacts that host markets and universities can capture:

- In 2007, Iowa played Northern Illinois at Soldier Field in Chicago, which was technically a “home” game for NIU. The game was a sellout (61,500 tickets), and Iowa fans comprised at least 45,000 seats, according to estimates.

This April, Iowa and Northern Illinois announced that they will once again play each other at Soldier Field, to open the 2012 season. Like the 2007 game, NIU will be the home team, and Iowa will not lose a home game from its 2012 schedule.

NIU is also playing Wisconsin at Soldier Field on September 17, 2011.

- For the 2009 BYU-Oklahoma game at Cowboys Stadium, the Cowboys acted as promoter and paid BYU \$1.5 million and Oklahoma \$2.5 million. The game was a sellout; BYU instantly sold its allotment of 7,500 tickets and Oklahoma sold more than 50,000.
- The annual Chick-fil-A Kickoff Game is held at the 72,000-seat Georgia Dome in Atlanta. In 2009, both Virginia Tech and Alabama sold their allotment of 31,000 tickets, and the game was a sellout. Thousands of additional people were expected to attend other game-related festivities throughout Atlanta on Friday and Saturday.
- In 2009, Ohio State played Toledo at Browns Stadium in Cleveland, which was a “home” game for Toledo. As a result, Toledo received 58,000 tickets, and Ohio State just 12,500. Toledo required a minimum donation of \$100 to its athletic department in order to purchase a ticket for the game, and many donations came from Ohio State fans. Toledo, acting as promoter, sold its 58,000 tickets, while its average attendance for a normal home game is just 17,000. Ticket sales alone generated approximately \$3.5 million, before considering the donations.

Ohio State earned less than \$1 million from the game, but will not pay a guarantee to Toledo when they play in Columbus in 2011 (a typical guarantee would be approximately \$850,000), and had the opportunity to play in Cleveland. In addition, the university was able to avoid playing in a 30,000-seat stadium in Toledo as part of the “home-and-home” series.

In 2006, Wisconsin played Bowling Green State University in Cleveland.

- The 91,000-seat FedEx Field will host two college games in 2010. The first will be Virginia Tech-Boise State in October; Virginia Tech will receive \$2.35 million and Boise State \$1.25 million for participating. Virginia Tech also played USC at FedEx Field in 2004.

In November, Indiana University will play a “home” game against Penn State at FedEx Field. For agreeing to move the game from Bloomington, IU will receive a guaranteed \$3

million, which is more than three times its revenue from a typical home game, and has to sell only 7,000 tickets. Aside from financial considerations, IU also cited the “bowl-like” experience of the game and the opportunity to help with recruiting on the East Coast.

- Colorado and Colorado State recently agreed to play the annual Rocky Mountain Showdown game at Denver’s 76,000-seat Invesco Field for 10 years beginning in 2010. Based on relative seating capacities at their home stadiums, tickets will be split 55% to 45% in favor of Colorado. In the past, the game has been held in Denver as well as on each school’s campus. According to estimates, CSU will earn an additional \$1.0 to \$1.5 million each year from playing in Denver, and CU will earn an additional \$750,000.
- Rice University agreed to move its 2010 home game against Texas to Houston’s Reliant Stadium, after being offered an undisclosed sum from SMG-Reliant Park that reportedly will generate twice as much revenue as the school earns from an entire season of on-campus home games.
- In 2010, Kansas City’s Arrowhead Stadium will host three college football games: Kansas-Missouri, Iowa State-Kansas State, and Pittsburg State-Northwest Missouri State.
- Northwestern University recently announced that it will host the University of Illinois this November 20 at Chicago’s Wrigley Field. Of approximately 40,000 seats at Wrigley Field, the Cubs will control 5,000, Illinois will get 3,000, and Northwestern will have approximately 32,000. Northwestern, which averaged 21,000 per home game in 2009, hopes to increase attendance at other games this year by including the Illinois game in its season-ticket package.
- Other neutral-site marquee games include Syracuse games at the new Meadowlands Stadium in 2012 and 2014 (against USC and Notre Dame), Syracuse and Rutgers games at Yankee Stadium, and Washington State often plays one game per season at Seattle’s Qwest Field.
- Other universities and facilities are known to be actively searching for neutral-site games:
 - The Washington Redskins are reportedly discussing the possibility of additional college games at FedEx Field with “high-profile” teams.
 - Notre Dame plans to play one neutral-site game per season in the future. In addition to its 2014 game at the Meadowlands, Notre Dame will play Army at Yankee Stadium in 2010, Maryland at FedEx Field in 2011, and Arizona State at Cowboys Stadium in 2013. With 2012 open as of early 2010, the university announced that its first option is to play at Soldier Field in Chicago (reportedly against the University of Miami). The university has

also announced that its other “priority markets” include Toronto, Cleveland, Atlanta, and Indianapolis.

In addition to playing in San Antonio in 2009, Notre Dame has played Navy at multiple locations in the last ten years, including Orlando, Baltimore, and the Meadowlands’ former Giants Stadium.

- o In addition to this fall’s game at Wrigley Field, Northwestern has also discussed playing a regular-season game at Yankee Stadium (due to ties between NU and the Yankees).

Conference Championship Games and Bowl Games

Conference championship games and bowl games are events that generate significant economic impacts, due to the high percentage of attendees from out of town. As previously mentioned, the addition of the University of Nebraska to the Big 10 is expected to lead to a conference championship game beginning in 2011 (as of early July 2010, it has not yet been approved by university presidents). An indoor stadium in a Big 10 state would likely be a favorite to host this game. According to recent reports, the Metrodome and Lucas Oil Stadium have already expressed interest in hosting, although the Metrodome’s viability is dependent on its unfunded renovation, according to a facility representative (Detroit’s Ford Field is the other indoor stadium in Big 10 territory). According to these reports, Chicago’s Soldier Field – an open-air stadium – is also interested in bidding for the game.

Also, as mentioned above, Lambeau Field is not necessarily expected to be a strong candidate to host a postseason bowl game, although not all bowls are held in warm-weather climates or indoors (such as the Humanitarian Bowl in Boise, the EagleBank Bowl in Washington DC, and New York’s Pinstripe Bowl). However, the following summarizes the location of conference championship and postseason bowl games, as some are held in NFL and MLB stadiums.

Table 33: 2009 NCAA Conference Championship Games in NFL Stadiums

Conference	Stadium, City
MAC	Ford Field, Detroit
SEC	Georgia Dome, Atlanta
Big 12	Cowboys Stadium, Arlington
ACC	Raymond James Stadium, Tampa
Source: NCAA	

Table 34: 2009-10 NCAA Bowl Game Locations

Game	City	Tenant(s)			
		NFL	NCAA	MLB	None/Other
New Mexico Bowl	Albuquerque		•		
St. Petersburg Bowl	St. Petersburg			•	
New Orleans Bowl	New Orleans	•			
Las Vegas Bowl	Las Vegas		•		
Poinsettia Bowl	San Diego	•	•		
Hawaii Bowl	Honolulu		•		
Little Caesars Bowl	Detroit	•			
Meineke Car Care Bowl	Charlotte	•			
Emerald Bowl	San Francisco			•	
Music City Bowl	Nashville	•	•		
Independence Bowl	Shreveport				•
Champs Sports Bowl	Orlando				•
Humanitarian Bowl	Boise		•		
Holiday Bowl	San Diego	•	•		
Armed Forces Bowl	Fort Worth		•		
Sun Bowl	El Paso		•		
Texas Bowl	Houston	•			
Insight Bowl	Tempe		•		
Chick-fil-A Bowl	Atlanta	•			
Outback Bowl	Tampa	•	•		
Gator Bowl	Jacksonville	•			
Capital One Bowl	Orlando				•
Rose Bowl	Pasadena		•		
Sugar Bowl	New Orleans	•			
International Bowl	Toronto			•	•
Papajohns.com Bowl	Birmingham		•		
Cotton Bowl	Arlington	•			
Liberty Bowl	Memphis		•		
Alamo Bowl	San Antonio				•
Fiesta Bowl	Glendale	•			
GMAC Bowl	Mobile		•		
BCS National Championship*	Pasadena		•		

* Game rotates between Pasadena, Glendale, New Orleans, and Miami.

Source: NCAA, AECOM

High School Football Games

In addition to college football games, many NFL stadiums also host high school football games. As one of the premier football stadiums in each state, they are often the host of state championships, as well as regular season games and tournaments. Similar to college football games, high school games would take place during NFL season or immediately before. The type of games hosted (such as regular season vs. playoffs) and the home markets of the participating teams would significantly affect the economic impacts that could be generated.

Examples of NFL stadiums that host high school football are as follows:

- Soldier Field hosts an annual high school Kickoff Classic tripleheader on a Friday in late August.
- The new Cowboys Stadium hosted the Kirk Herbstreit Varsity Series in 2009, which consisted of four games on one day, with teams from throughout the country.
- In past years, Reliant Park has hosted a high school football kickoff classic doubleheader.
- Since its recent opening, Lucas Oil Stadium has hosted multiple high school games, including the four-game Horseshoe Classic and the two-game Payback Classic (named for Peyton Manning).
- M&T Bank Stadium annually hosts two local rivalry games in November. Attendance at each game reaches approximately 13,000.
- Since 2005, Raymond James Stadium in Tampa has hosted an annual rivalry game between two local high schools. Attendance reached a maximum of 13,000 but decreased to less than 5,000 last year.
- Seattle's Qwest Field annually hosts the five-game Emerald City Kickoff Classic with local and out-of-state teams, and the "Best of the West" game that features a top team from Washington and one from another state. (The stadium's public art program includes a piece called "The State of Football" that incorporates a replica helmet of every high school team in Washington.)
- The following table lists the states that have NFL stadiums and whether they currently host their state's high school football championships. In general, attendance and out-of-town visitation (and therefore, economic impacts) are expected to be greater at state championships games compared to regular-season games.

Table 35: High School Football Championships at NFL Stadiums

State	Stadium	Host championships?
Arizona	Univ. of Phoenix Stadium	Yes, but not all classes
California		
Oakland	Oakland-Alameda County Coliseum	No
San Francisco	Candlestick Park	No
San Diego	Qualcomm Stadium	Yes, regional championships at Qualcomm
Colorado	Invesco Field	Yes, but not all classes
Florida		
Miami	Sun Life Stadium	No, but has hosted in the past
Jacksonville	Jacksonville Municipal Stadium	No
Tampa	Raymond James Stadium	No
Georgia	Georgia Dome	Yes
Illinois	Soldier Field	No
Indiana	Lucas Oil Stadium	Yes
Louisiana	Superdome	Yes
Maryland		
Baltimore	M&T Bank Stadium	Yes
Landover	FedEx Field	No
Massachusetts	Gillette Stadium	E. MA championships, but not all classes
Michigan	Ford Field	Yes
Minnesota	Metrodome	Yes
Missouri		
Kansas City	Arrowhead Stadium	No
St. Louis	Edward Jones Dome	Yes
New Jersey	Giants Stadium	Yes, but not all classes
New York	Ralph Wilson Stadium	Yes, but not all classes
North Carolina	Bank of America Stadium	No
Ohio		
Cincinnati	Paul Brown Stadium	No
Cleveland	Cleveland Browns Stadium	No, but have been in Cleveland in the past
Pennsylvania		
Philadelphia	Lincoln Financial Field	No
Pittsburgh	Heinz Field	W. PA championships at Heinz Field
Tennessee	LP Field	No
Texas		
Dallas	Cowboys Stadium	Texas Stadium has hosted Class 5A; new stadium is expected to
Houston	Reliant Stadium	Reliant has hosted Class 5A in the past
Washington	Qwest Field	No
Wisconsin	Lambeau Field	No (all classes at Camp Randall Stadium)
Source: AECOM		

As the table shows, a number of NFL stadiums host all of their state's championships, while others only host larger classes' championships or regional championships. (Those that do or have hosted championships are highlighted.) In Wisconsin, all classes' championships are played at Madison's Camp Randall Stadium.

Other Events (Sports and Non-Sports)

Outdoor NFL stadiums in both warm and cold climates also often host a wide range of other events, although these are often non-recurring, one-time events. (Domed NFL stadiums can also host other types of events, such as basketball games and professional wrestling, which are not possible at Lambeau Field.) This section describes events other than those discussed above that have commonly been held at NFL stadiums.

Soccer

Many NFL stadiums have hosted a wide range of soccer matches over the years, including Major League Soccer (MLS) and collegiate games, international tournaments, and international qualifying games and exhibitions (“friendlies”). In 2009, the World Football Challenge – an exhibition tournament between four North American and European clubs – was held at six US football stadiums. The facilities included four NFL stadiums (the Georgia Dome, M&T Bank Stadium, Gillette Stadium, and Cowboys Stadium,) and two college stadiums (the Rose Bowl and Stanford Stadium). In addition, this July, Fenway Park will host its first soccer game since 1968, with a friendly between Scottish and Portuguese clubs.

The Ravens and M&T Bank Stadium have been particularly active in the international soccer market. In addition to last year’s World Football Challenge match, the Ravens are the promoter of this summer’s Manchester City-Inter Milan friendly and are actively seeking top matchups for future summers.

According to the U.S. Soccer Federation, the sport’s national governing body, Lambeau Field’s playing field is generally too small to accommodate soccer. Professional soccer fields are typically 70 to 75 yards wide, which is larger than Lambeau’s surface, particularly in the corners. According to the USSF, if Lambeau’s surface was large enough for soccer, the federation would have already tried to bring matches to the stadium. However, in non-Olympic and -World Cup years, field standards are not as stringent, and Lambeau Field would have a better opportunity to host soccer matches. In 2009, the stadium had the opportunity to host a US women’s national team match, but the game was held elsewhere due to concerns from the District regarding attendance. In addition, the District submitted a preliminary venue questionnaire to the USA Bid Committee to be considered as a host of 2018 or 2022 World Cup matches. However, Lambeau Field was not considered as a finalist due to the size of the Green Bay market, the stadium’s capacity, and the size of the playing field.

Hockey

In recent years, collegiate and professional hockey games played in outdoor stadiums have become more popular. The highest-profile game is the NHL’s annual game on New Year’s Day, which is now known as the Winter Classic. These games have been held in NHL markets, and the two most recent games have been in MLB stadiums (Chicago’s Wrigley Field and Boston’s Fenway Park), although the 2008 game was at the NFL’s Ralph Wilson Stadium in Orchard Park, New York. (The NHL’s only other outdoor game was held at the 57,000-seat Commonwealth Stadium in Edmonton in 2003.) In late May,

the NHL announced that the 2011 Winter Classic will be played at Pittsburgh's Heinz Field. A second outdoor game, the 2011 Heritage Classic, is expected to be formalized this summer and would be held next February at the 38,000-seat McMahon Stadium in Calgary.

Examples of other past and upcoming outdoor hockey games include the following:

- In 2006, Lambeau Field hosted the Frozen Tundra Hockey Classic between the University of Wisconsin and Ohio State, in front of approximately 41,000 fans.
- In 2001, Michigan State hosted Michigan at Spartan Stadium, and the game held the worldwide hockey attendance record of approximately 75,000 until this May, when a US-Germany game at the world championships attracted nearly 78,000 people to a soccer stadium in Germany.

This December, Michigan and MSU will have a rematch at Michigan Stadium, and six days before the game, three high school hockey games will be played on the ice. In May, when ticket sales for the UM-MSU game exceeded 100,000, ticket sales were stopped in order to allow incoming freshman to have the opportunity to purchase tickets in the fall. (Michigan Stadium's capacity will exceed 108,000 when ongoing renovations are complete by the fall.)

- Wisconsin played Michigan at Madison's Camp Randall Stadium in February 2010. The "Camp Randall Hockey Classic" attracted 55,000 attendees in the 80,000-seat stadium, which is currently the second-highest attendance for a non-NHL hockey game. The success of this game on campus may potentially decrease the likelihood of the Badgers playing at Lambeau Field again, where they don't control all revenues.
- A doubleheader of four local college teams was held at Fenway Park the weekend after this year's Winter Classic.
- In February 2010, the first minor-league game (American Hockey League) was played outside at the New York State Fairgrounds in Syracuse.

Other Sports

A number of other sports have also been held on NFL fields, including lacrosse, rugby, and monster trucks, in addition to marching band events and competitions (the dimensions of a lacrosse and rugby field are similar to that of a football field). In March, Cowboys Stadium hosted a Manny Pacquiao-Joshua Clottey boxing match, and is one of two venues being considered for a Pacquiao-Floyd Mayweather bout this November. Also, this June, Yankee Stadium hosted a Miguel Cotto-Yuri Foreman bout. In some cases, the events are generally held in a specific geographic region because of a sport's following (for example, the NCAA lacrosse championship has been held at multiple NFL stadiums on the East Coast).

Events such as professional bull riding, monster trucks, and Snocross are often held in large stadiums and arenas. In 2010, the ISOC Snocross series will be held at facilities including the Milwaukee Mile, LCO

Casino in Hayward, the Grand Geneva in Lake Geneva, and MLS' Rio Tinto Stadium outside of Salt Lake City. The Advance Auto Parts Monster Jam series will be held at many NFL and MLB stadiums, including the Metrodome, Raymond James Stadium, Lucas Oil Stadium, Qualcomm Stadium, and others. Also, the AMA Supercross series will only be held in large stadiums (indoor and outdoor), including Lucas Oil Stadium, Qwest Field, AT&T Park, the University of Utah's Rice-Eccles Stadium, and Sam Boyd Stadium in Las Vegas.

Parking Lots and Practice Fields

In addition to the stadium field, a number of facilities have held events in their parking lots and/or on adjacent practice fields. Based on a review of the event calendars of other NFL and MLB stadiums, these events have included music festivals, family shows such as Cirque du Soleil, car sales and shows, paintball and go-karting events, and social/community events such as a Boy Scout sleepover.

Other Stadium and Field Rentals

Similar to the use of parking lots and practice fields, major stadiums also make other facilities (such as club areas, suites, press boxes, locker rooms, concourses, and others) available for rent. This is currently done at Lambeau Field. In addition, stadiums generally also make the playing field available for rentals, such as banquets, workouts, weddings, and other events. Depending on an event's size and orientation, these events can generate economic impacts, or alternatively allow for local use of a facility. While most major stadiums actively advertise their playing field for rent, the following summarizes various information related to the use of stadium fields:

- In the NFL, many outdoor stadiums, such as those in Denver, Jacksonville, and Chicago, advertise field rentals for private events, but rates are not advertised.
- In MLB, a number of stadiums have published their standard rates for field usage by private events:
 - In Cincinnati (Great American Ballpark), a group can take batting practice for \$2,500,
 - In Washington D.C. (Nationals Park), a three-hour batting practice costs \$20,000,
 - In San Francisco (AT&T Park), the entire stadium can be rented for \$100,000 (weekdays) and \$150,000 (weeknights and weekends). Batting practice on the field costs \$25,000 to \$35,000,
 - In San Diego (Petco Park), two hours of field use costs \$18,500, and
 - In Chicago (US Cellular Field), the White Sox offer a number of on-field wedding packages, and in the past have offered on-field picnics, movies, and sleepovers to the general public.

Other Relevant Considerations

Based on a review of the non-tenant events held at other similar stadiums across the country, discussions with client representatives, other local stakeholders, and event/industry professionals, it appears as though there would be a market for other impact-generating events at Lambeau Field (although some events would attract a larger share of local residents). Aside from various issues mentioned above that would affect the stadium's ability to host events, the following also merit consideration:

- For concerts, Milwaukee's Summerfest and Oshkosh's Country USA Music Festival are held in June and July. Due to contractual restrictions with the promoters of these events related to geography and time, performers at these two festivals would generally not be able to play in Green Bay in the same summer.
- Alpine Valley Music Theatre in East Troy is a Live Nation venue, and the company would generally be expected to rout its acts there (where it controls all revenues) rather than to other facilities in the area. The 36,000-seat venue routinely hosts many of the top major touring acts in any summer, such as the Dave Matthews Band, Phish, Jack Johnson, Coldplay, and others.
- The standard ten-percent ticket tax at Lambeau Field can potentially be problematic when negotiating with promoters, as they typically would want to share in at least part of it (which they consider to be part of the ticket price). However, an amendment to the ticket-tax clause allows for the tax revenue to be used for any direct event-related expense, including payments to promoters and/or artists.
- For concerts in particular, most of Lambeau Field's club seats and luxury suites are essentially unusable, as they are fully indoors behind inoperable windows. (As a result, Lambeau's seating capacity is estimated at 54,000 for most concerts.)
- Because the Packers would retain ancillary revenues from other stadium events, they are perhaps in the best position to act as an event promoter. An outside promoter would have to earn its profit on ticket sales only, while the Packers could also rely on other sources, which would help to reduce the risk of lower-than-anticipated ticket sales.

Conclusions

Because there have been so few major events at Lambeau Field (not including Packers games and Atrium events), it is difficult to compare the actual estimated impacts of various types of events to Brown County. However, as previously shown in this report, the impacts associated with training camp, Packers games, and Atrium events are substantial. As other stadiums have shown, a wide range of non-NFL

stadium events can be attracted to facilities, and these events often capture attendees from a large geographic area.

The following highlights rough estimates of visitation and impacts that have been and could be generated by various types of events at Lambeau Field:

- **Training Camp** – as previously shown, 82 percent of training camp attendees are from outside of Brown County who stay an average of nearly two days. Total estimated economic impacts from training camp in 2009 were approximately \$7.4 million, based on 34,000 attendees. Training camp’s length and general schedule are set by the NFL, and practice attendance is already maximized based on seating capacity. However, the Packers have been attempting to increase visitation by adding other events during training camp, such as the 5K Run/Walk (which sold out in 2010) and the Packers Movie Night and fireworks show. An increase in total attendance of ten percent, for example, could generate an additional \$740,000 in economic impacts, based on the characteristics of 2009 attendees.
- **Packers Preseason and Regular-Season Games** – as previously shown, total economic impacts from last year’s ten-game home Packers schedule (preseason and regular season) were approximately \$123 million, or an estimated \$12 million per game. Assuming the overall NFL schedule is not expanded, these impacts are largely limited by the size of Lambeau Field, since all games are sold out. However, with an estimated 87 percent of attendees coming from outside of Brown County, a seating expansion would allow for greater impacts. For example, an additional 10,000 seats in Lambeau Field would presumably lead to 8,700 additional non-local attendees per game, or 87,000 per season. Based on the estimated per-game impacts and the current number of non-local attendees, a seating expansion of 10,000 seats could generate an additional \$17 million in spending impacts per year (or approximately \$1.7 million per home game).
- **Atrium Events** – while we have not explored the market for additional space within the Atrium, or other uses of existing Atrium space, approximately 60 percent of event attendees at the Atrium in 2009 originated from outside of Brown County. Corporate events in particular (65 percent) attracted non-local attendees. Based on the Atrium’s 2009 usage and attendee characteristics, an increase in total Atrium attendance of ten percent could generate an additional \$1 million in economic impacts.
- **Concerts and Other Events** – because these types of events were not held at Lambeau Field in 2009, we have not estimated their impacts to Brown County based on actual data. However, as is shown above, these events at other stadiums have clearly attracted large percentages of non-local attendees. Similar to Packers training camp and the team’s home games, for which more than 85 percent of attendees live outside of Brown County, a major event such as a concert is

also expected to attract a significant share of non-local attendees. This type of event would also be expected to be a regional draw due to the limited number of other facilities throughout Wisconsin that could host a major outdoor concert or sporting event. In addition, because these events are not currently being held at Lambeau Field, all associated impacts would be incremental to impacts from 2009 and other recent years.

The preceding sections reviewed non-NFL events typically held at stadiums and highlighted events that have been held at Lambeau Field. Interviews with the District and team indicate that the District has been working diligently with the Packers to bring non-NFL events to the stadium. While the team has been generally cooperative and has displayed flexibility, there has been some reluctance, particularly in regard to holding on-field events when the turf is not frozen. The District understands that holding a successful non-NFL event requires the full cooperation of the team, and the approach outlined below has been taken.

- Snowmobile races held during the winter in 2004 through 2006 were an important first step in opening the complex to non-football events in the stadium bowl. The events provided valuable experience to the facility's operating staff. Although attendance was lower than anticipated, economic impacts to the community were generated. Also, the events helped build confidence that non-football events could be held on the playing field (at a minimum, when it is frozen) without fear of causing significant damage.
- The Frozen Tundra Classic in 2006 built upon the experience provided by the snowmobile races and involved installation of an ice rink and seating on the playing field. The event further increased confidence regarding use of the field and provided valuable experience with promotion, load-in and load-out, and other operational aspects of a major non-football event with more than 40,000 attendees.
- The Leap of Faith event held in 2007 demonstrated that District events could be reasonably accommodated outside of the offseason and the District's priority scheduling period. This opens up a larger scheduling window for hosting non-football events.
- In 2009, after working for a number of years with a local promoter to bring a concert to Lambeau Field but with no concrete results, public concern began to rise. The District reviewed and summarized news coverage regarding the Lambeau Field referendum, and at its June meeting concluded that coverage created the public expectation that non-football events would be held at the stadium and that they would generate significant economic impacts locally. This summary was reviewed and discussed with the Packers. In August 2009, the District and team made a presentation to a City of Green Bay Committee that requested an update regarding possible non-football events at the stadium. At that point, there still appeared to be team concerns regarding an event's impact on the playing field.

- In response to continuing concerns regarding field protection, the District worked with the Packers to evaluate field protection systems by installing various products on the practice field in September 2009. A satisfactory outcome of the evaluation appears to have been a major turning point, and the Packers became much more receptive to the idea of an on-field concert. Consequently, an offer was presented to a major act for a summer 2010 concert, although an agreement could not be reached with the artist.
- In May 2010, LZ Lambeau was held and involved use of the seating bowl (including construction of a stage in the bowl and limited use of the playing field). The event further demonstrated the capability of the stadium to host non-football events. Additionally, a local tourism official reported that the event was a huge success throughout the community, based on responses from local hoteliers and retailers. The event clearly created an appetite for additional non-football events at the stadium.
- In July 2010, a production company for a major concert act toured the stadium and found it acceptable for a concert. The District and team, in cooperation with a local promoter, hope to attract a concert in 2011.

In the following section, we discuss potential capital improvements to Lambeau Field that could help to generate additional impacts from various types of events.

X. Capital Improvements for Additional Potential Impacts

According to a recent report in the *SportsBusiness Journal*, “throughout the NFL, teams and facilities are taking a more comprehensive look at planning upgrades over the next 10 to 20 years, compared with implementing isolated projects without considering the long-term effects.” In conjunction with the previous section, this section further explores the potential for Lambeau Field and its surrounding area to generate additional impacts through development of new facilities and amenities, accommodation of additional events, and others. We also discuss complementary facilities that have been developed at other NFL stadiums.

Events’ Needs and Capabilities of Lambeau Field and the Atrium

Based on discussions with event professionals, Lambeau Field’s physical offerings are generally sufficient to host the types of events that are typically held in NFL stadiums. As described in the previous section, the playing field is too small to host professional soccer matches. However, the field has already successfully hosted major collegiate hockey, and there appear to be no significant physical impediments to hosting concerts or other sporting events. Based on our interviews, Lambeau Field’s sound system is sufficient, although concerts often supply their own sound equipment based on their unique needs. The stadium’s loading dock system is not ideal, but is not such that it would preclude events from coming to Lambeau Field. Beyond these characteristics, two issues appear to remain:

- **Premium seating** – currently, most of Lambeau Field’s premium seating (all club seats and some luxury suites) are fully enclosed behind inoperable windows. While this provides protection from weather, these seats are unusable for concerts in particular due to the windows’ effect on sound. Providing windows that can be opened and closed would allow these higher-margin seats to remain in inventory for all stadium events, and would provide seatholders with the option of opening and closing the windows.

In addition, the Packers are currently exploring the potential market for additional premium seating offerings at Lambeau Field.

- **Seating capacity** – Packers games have famously been sold out for decades, and according to the team, the season-ticket waiting list has more than 80,000 names (with an average wait of 30 years). Because of this demand, single-game tickets are not sold. An expansion of Lambeau Field’s seating capacity would allow for additional attendance at Packers games, and as described in the previous section, a high percentage of these attendees would generate economic impacts because most live outside of Brown County.

As described in the previous section, we have not completed a market analysis for the need for additional event space in the Atrium.

Fans' Response to Stadium Offerings and Amenities

In Section XI, we note that according to past surveys of training camp and regular season visitors, the trip to Green Bay met or exceeded everyone's expectations, and many planned to return to the area.

However, visitors were also asked more specifically what activities they participated in during training camp and before games. These responses could help to guide further improvements to the stadium and its offerings.

During 2009's training camp, attendees were asked to identify what they enjoyed most. (Fans were only able to select one answer.)

Table 36: Fans' Most Enjoyable Aspects of Training Camp

	# of Responses	% of Responses
Watching practice	128	50.4%
Seeing players close-up	49	19.3%
Player/kids bike rides	17	6.7%
Getting autographs	17	6.7%
Stadium tour	13	5.1%
Packers Pro Shop	10	3.9%
Packers Hall of Fame	6	2.4%
Packers Family Night	6	2.4%
Tundra Tailgate Zone	3	1.2%
Packers Experience (inflatables)	3	1.2%
Other	2	0.8%
Total	254	100.0%
Source: Green Bay Packers		

As the table shows, the two most common responses were watching practice and seeing players close up, followed by two other opportunities to interact with players (the tradition of players riding kids' bicycles and getting autographs). While these activities do not directly create economic impacts, providing more opportunities to interact with players could help to attract more fans and encourage them to stay in the area longer.

Other attractions, such as the Packers Pro Shop and Hall of Fame and the Tundra Tailgate Zone, were infrequently mentioned as the favorite aspect of training camp (although, as previously mentioned, fans were only able to select one aspect). Improving these offerings could also help to create more economic impacts through additional spending by visitors and increased length of stay. Improved events and activities such as Family Night and the Packers Experience could also further help to generate additional impacts.

The following table summarizes responses of regular-season attendees regarding which activity best describes how they spent their time (two to four hours) before kickoff.

Table 37: Regular Season Pre-Game Activities

	2008	2009
Walked around/near Lambeau Field	22.5%	23.8%
Watched players warm up	26.2%	22.6%
Visited the Atrium (Curly's, HOF, Pro Shop, etc.)	18.3%	18.1%
Tailgated	14.4%	15.4%
Went to a local restaurant	9.7%	9.1%
Visited the Tundra Tailgate Zone	4.7%	6.9%
Arrived just in time for the game	2.4%	2.4%
Other	2.0%	1.7%
Total	100.0%	100.0%
Source: Green Bay Packers		

As shown, nearly half of attendees said they generally spent the pre-game hours walking around the stadium and watching warm-ups. Others visited the Atrium and its attractions, tailgated, and went to off-site restaurants or the Tundra Tailgate Zone.

Recent and Planned Capital Improvement Projects at NFL Stadiums

As reported in the *SportsBusiness Journal*, many NFL stadiums have recently invested in significant capital improvements or are currently in the planning process. These improvements (beyond relatively routine or ongoing improvements such as upgrading videoboards) are generally designed to maintain or improve a facility's usefulness, competitiveness, and ability to generate visitation and revenues. The following summarizes examples of these NFL stadiums (not including new stadiums; including the new Meadowlands Stadium, three new stadiums will have opened since the 2008 NFL season).

- **Arrowhead Stadium, Kansas City** – this season, the Kansas City Chiefs will unveil the renovated Arrowhead Stadium after \$375 million in improvements. Projects include the Chiefs Hall of Honor, wider concourses, expanded restrooms and concessions, a Founder's Plaza, and the "horizon" level of premium seating.
- **Heinz Field, Pittsburgh** – the Steelers are part of a development group that is currently building an indoor/outdoor, year-round amphitheater and entertainment facility on land adjacent to Heinz Field. The \$12-million complex is expected to open this November, and received a \$2.5-million state grant. Indoor concerts will accommodate up to 2,500 attendees, and outdoor shows will have a capacity of 5,500. In addition, a small club will have a 400-person capacity, and restaurants and a 178-room hotel are also planned.

In addition, the Steelers are currently exploring opportunities to increase Heinz Field's capacity and year-round use, through expansion of its south end zone and other areas such as the Great

Hall. Similar to Lambeau Field, Heinz Field's south end zone has additional capacity for various types of seating areas ranging from group areas to premium seating and special event space.

- **Soldier Field, Chicago** – the Chicago Park District, owner of Soldier Field, recently started a master plan that will aim to keep to stadium in the top 25 percent of NFL venues over the next 15 years. The plan will include looking into the stadium's ability to book more special events, both inside and outside of the stadium. In the NFL, only Soldier Field is older than Lambeau Field, and like Lambeau, it recently underwent a major renovation that brought the facility more in line with other facilities across the league.
- **Georgia Dome, Atlanta** – the Falcons and their landlord, the Georgia World Congress Center Authority, have been in talks regarding renovations to the Georgia Dome or a potential new open-air stadium. The Authority recently commissioned a study that would attempt to upgrade the Dome to current standards, including a retractable roof, doubling the number of club seats, and adding more parking spaces.

Other teams, including the St. Louis Rams and Cincinnati Bengals, have leases that stipulate that their facility must remain among the league's best in terms of characteristics such as amenities, quality, and revenue generation. In addition, a number of NFL teams are actively seeking new facilities, including the Minnesota Vikings, San Diego Chargers, Oakland Raiders, and San Francisco 49ers.

Facilities at Other NFL Stadiums

A number of other NFL teams, cities, and facility owners have successfully developed ancillary facilities within and adjacent to their stadiums that help to generate additional visitation and local use, and the accompanying impacts (as well as use by local residents and events). This section briefly summarizes examples of these facilities (not including any that are similar to those already in place in Green Bay, such as the Atrium).

It is important to note that we have not prepared market analyses for any of these uses and therefore are not recommending them for the Lambeau Field area, or Green Bay in general. These uses, and any others, would have to be studied in the broader context of the local market and the potential need for new event, entertainment, retail, and other uses, particularly due to differences in characteristics such as market size and climate. However, these represent examples of successful facilities and attractions that have been built in the immediate vicinity of NFL stadiums in other markets.

- **Youth Football Stadium, Buffalo** – in 2004, the Bills became the first NFL team to open a youth football facility on its stadium site. The Bills do not charge for use of the field, and users are primarily from western New York but also from across the country. In 2008, the stadium hosted more than 40 games, including the I-90 Youth Football Classic (10 games and a pee-wee football

carnival), national flag football tournaments, coaching clinics, and player development camps. The facility is also the home of the Jim Kelly Football Camp, which attracts more than 500 players from across the country. The facility, formerly a Bills practice field, was partially funded by the NFL Youth Football Fund.

At Milwaukee's Miller Park (MLB), the Brewers have a similar facility that is focused on baseball and softball. Helfaer Field is primarily used for youth games, but is also rented for Brewers' pre-game tailgating and private parties.

- **Concerts on the Green, San Diego** – when the Chargers moved from their previous practice space adjacent to Qualcomm Stadium to a new facility, the City of San Diego contracted with AEG Live to produce a concert series on the vacated practice field. The 200,000-square foot space has a general admission capacity of 13,000 people. (Also, as previously mentioned in this report, the MLB Padres recently announced their intention to self-promote a summer [in-season] concert series at Petco Park, in a scaled-down configuration of approximately 6,000 seats that would include on-field seating.)
- **Patriot Place, Foxborough** – The Kraft Group, owners of the Patriots and Gillette Stadium, developed the open-air Patriot Place district that surrounds the stadium. Phase I of Patriot Place opened in 2007. The complex includes more than 1.3 million square feet of retail, restaurant, entertainment, and hotel uses, including New England's first Bass Pro Shop, an outdoor skating rink, and a health care center. Kidville, a children's entertainment, play and educational facility, is also being added to Patriot Place.
- **Qwest Field Event Center, Seattle** – the Qwest Field complex includes the Event Center, a 325,000-square foot exhibition facility, and the temporary 6,000-seat WaMu Theater that is configured within the Event Center.
- **Soldier Field, Chicago** – when Soldier Field was renovated, 30 acres of surrounding parkland was created and improved for public use. New spaces include a sledding hill, a children's garden, a veteran's memorial (because of the stadium's original dedication to American soldiers killed in war), and others.

Also, at Wrigley Field in Chicago (an MLB stadium), the Cubs built a temporary ice rink adjacent to the stadium, in a parking lot, during the 2009-10 winter offseason. The rink reportedly cost \$300,000, and skaters paid \$6 (children) and \$10 (adults) to use the facility.

XI. Estimated Value of Earned Media

Sports properties (such as the Packers) and sponsors alike often attempt to measure the value of media coverage they receive, and a common method is through estimating the cost of purchasing an equivalent amount of advertising space or time. This can include broadcast, print, and online coverage. Typically, coverage is quantified in terms of its length (of broadcast time or print space) or number of mentions, and a monetary value is assigned based on advertising rates.

However, this method is not ideal, as it does not necessarily consider the following:

- The quality of media coverage – for example, coverage of a team can be negative instead of positive, and therefore less valuable to the team, or even costly,
- Estimating the actual length or amount of print media coverage – the entire length of a column (in inches) is often used, although a team or facility may only receive a couple of mentions,
- Selecting the appropriate advertising rates – the maximum or published rates are often used, when in fact lower rates are generally negotiated, and
- The assumption that 30 seconds of broadcast coverage that consists of ten different mentions of three seconds each, for example, is not as valuable as a single, continuous 30-second ad.

In the larger picture, estimating the value of media coverage does not necessarily or directly address how much of the audience was actually attentive to media mentions, or how their attitudes or actions may be influenced by them. Despite these limitations, this method is commonly used, particularly by sponsors, due to the ease of quantifying the data and objectively communicating its results. The Packers continually monitor their media coverage, which is described below. And while the impact on awareness or image related to media coverage is not directly quantified by this method, past surveys of Packers training camp and regular-season game attendees have addressed some of these issues, and those results are also summarized here.

Packers' Media Coverage

The Packers subscribe to a service that monitors the team's media coverage year-round. This service compiles all mentions of the team on major television and cable networks, as well as radio, across the country. This does not currently include online coverage, and only includes weekdays. (Weekend coverage, particularly during the season, would presumably exceed weekday coverage.) The number of clips (on TV and radio), the estimated audience, and the estimated publicity value are provided. The estimated publicity value is the equivalent advertising rate for the coverage in each market.

Because the data does not include weekends, the vast majority of Packers games are not included.

Through the NFL's television contracts, every Packers game is broadcast on CBS, NBC, Fox, or ESPN.

In 2009, the Packers played on one Sunday night game and two Monday night games that were broadcast nationally. The Packers' Monday night game against Minnesota on October 5, 2009 was the highest-rated Monday Night Football game on ESPN, the highest-rated program in ESPN's 30-year history, and the highest-rated program ever on US cable television. The Packers also have a strong radio presence, with coverage on more than 40 stations throughout Wisconsin, Michigan, Minnesota, North Dakota, and South Dakota, as well as through the NFL's contract with Sirius satellite radio.

The following table summarizes the team's measurable media coverage during one and a half weeks of the 2009 season, as well as the season-long coverage on weekdays.

Table 38: Packers Media Coverage

Day	Time of Week	Total # of Clips	Cumulative Est. Audience	Cumulative Est. Publicity Value
Monday, September 14, 2009	Day after Game (Wk. 1 vs. Chicago)	72	4,612,689	\$116,904
Tuesday, September 15, 2009	Midweek	43	2,290,323	77,902
Thursday, September 17, 2009	Midweek	33	1,086,503	52,588
Friday, September 18, 2009	Midweek	23	654,418	27,960
Monday, September 21, 2009	Day after Game (Wk. 2 vs. Cincinnati)	52	2,199,427	95,922
Wednesday, September 23, 2009	Midweek	37	1,459,261	50,276
2009-10 NFL Season (9-2-09 to 1/29/10)				
All Days Combined	--	3,894	271,381,278	\$14,206,806
Average Day	--	40	2,856,645	149,545
Maximum*	--	76	14,111,622	708,612
Minimum**	--	8	190,924	7,818
Source: Green Bay Packers, AECOM				
* From October 26 (# of clips; day after game @ Cleveland) and November 9 (audience and value; day after game @ Tampa Bay)				
** From January 22, 2010, the Friday before the NFC and AFC championship games; the Packers' season had already ended.				

As shown, media coverage increases on Mondays after a Sunday game. During the five-month 2009-10 season, an estimated 3,900 Packer-related clips were seen by more than 271 million people, with a total estimated media value of \$14.2 million. On a typical day during the season, the Packers receive approximately \$150,000 worth of media coverage that is seen by nearly 2.9 million people across the country. On November 9, 2009 (the day after the Packers' game in Tampa Bay), the team received the greatest amount of coverage in terms of the total audience and the publicity value (more than 14 million people and \$700,000, respectively).

Impact of Other Coverage on Fans and Attendees

In recent years (2005 and 2008), the University of Wisconsin-Green Bay (UWGB) completed surveys of fans that attended Packers training camp and regular-season games. Part of these surveys address where fans receive their information related to their trips to Green Bay, and their reactions to local marketing initiatives and their anticipated future behavior. The following summarizes these results, related to media use/coverage and potential accompanying impacts.

- The primary source of trip-planning information for attendees was the Internet, and the Packers web site was the most commonly-sited Web site. Other sources included newspapers, brochures, and magazines.

All respondents indicated that their trip met or exceeded their expectations, and that they would return to the Green Bay area, which would create additional impacts. Forty-one percent of respondents said that their trip exceeded expectations, and the remaining 59 percent said that their trip met expectations. In addition, 44 percent said that they would definitely return to the area within the next year, and 36 percent said that they were very likely to return.

XII. Other Community Impacts

In addition to the impacts discussed in previous sections of this report, the Packers organization also benefits the community in many other ways that are not necessarily captured by an economic impact analysis. In this section, we briefly summarize various activities and contributions made by the team and the Green Bay Packers Foundation, including current and former players, coaches, and staff. These include donations to non-profit organizations throughout Brown County and the rest of Wisconsin and Upper Michigan, fundraising events, personal appearances, and others.

According to the Packers' Community Outreach Report, the team's various contributions created a "charity impact" of more than \$4 million in 2008, the most recent year for which information is available (and the year that is described below).

The Packers' Community Activities and Contributions

In general, the Packers' community-based programs have the goals of assisting non-profit organizations, mentoring youth, encouraging volunteerism, and gaining an awareness of communities' unique needs. In 2008, this included more than 500 special appearances, 8,000 filled requests for signed memorabilia, and more than \$1.4 million in cash donations. Many of these initiatives were made possible through the generosity of Packers fans and supporters, in addition to direct contributions from the team.

Events

- **Jerry Parins Cruise for Cancer** – nearly 800 bikers, Packers players, and staff raised approximately \$250,000 for various cancer-related organizations.
- **Brown County Children's Charity Golf Classic** – is sponsored by the Packers and raised approximately \$30,000.
- **Preseason games** – for nearly 60 years, the Packers have designated one preseason game as the Midwest Shrine Game, which has raised more than \$3.1 million in donations. Since 1961, another preseason game has been the Bishop's Charities Game, which has raised more than \$3.4 million for the Catholic Diocese of Green Bay.
- **65 Roses Celebrity Golf Tournament** – the current Packers head coach historically serves as honorary chairman of the tournament, which has raised more than \$500,000 to fight cystic fibrosis.
- **Edgar Bennett Celebrity Bowl-A-Thon** – the former Packers running back and current coach, along with more than 80 other Packers, raised over \$45,000 for The Angel Fund for Children with Cancer.

- **Green and Gold Gala** – this annual event supports family Services of Northeast Wisconsin, which offers services to needy families in the area.
- **Families of Children with Cancer Holiday Party** – 16 Packers attended the annual event for young cancer patients and their families.

Green Bay Packers Foundation Grants

Since its inception in 1986, the Foundation has contributed more than \$1.9 million towards education, civic affairs, health services, human services, and youth-related programs. In 2008, 85 Wisconsin-based groups received more than \$170,000 (\$96,000 of which was provided to Brown County organizations). The Packers Scholarship Program, established in 2002, awards \$15,000 in scholarships each year.

Community Outreach Initiatives

- **Fit Kids** – in conjunction with WFRV, Karma Group, and the Green Bay Area Public School District, Fit Kids is a fourth-grade curriculum that focuses on physical, nutritional, and social health.
- **What Moves U** – the Packers and the American Heart Association offer middle schools throughout the state a program designed to combat childhood obesity.
- **Atlas and Athena** – in partnership with seven Wisconsin high schools, the Packers initiated a program designed to promote healthy living and reduce the use of steroids and other drugs.
- **Hometown Huddle** – the Packers and City of Green Bay provided a new playground for Beaumont Elementary School Park.
- **Coats for Kids** – one regular-season game has been designated as a coat-collection drive. In 2008 fans donated more than 480 coats and \$8,000.
- **Internships and Pro Shop Outreach** – the Packers offer internships in many departments of the organization, and the Pro Shop annually hires two local high school students and provides two scholarships through Scholarships, Inc.
- **Project LEAP!** – for this event, the Atrium is transformed into an indoor playground for children.
- **Shindig at 1265** – provides activities for all ages to participate in events such as crafts, cookie decorating, flower potting, and others.
- **Spooktacular Fun at Lambeau Field** – is a Halloween-themed public event held in the Atrium.
- **Ecumenical Thanksgiving Day Dinner** – a prayer service and dinner at the Atrium brought in 500 volunteers who served 850 needy residents, and an additional 600 meals were delivered to local residents who could not leave their homes.

- **Make-A-Wish Foundation** – in 2008, seven children with life-threatening illnesses chose to visit the Packers and Lambeau Field.
- **School visits** – in 2008, Packers players visited 11 local schools.
- **Cerebral Palsy Telethon** – with the involvement of Mark Murphy and other Packers representatives, the longtime event raised more than \$1 million for Green Bay’s CP Center.
- **Campbell’s Chunky Soup “Click for Cans”** – for the seventh consecutive year, fans voted the Packers as their favorite team, which resulted in more than 17,000 cans of soup being donated across Wisconsin.
- **Tailgate Tour** – the annual four-day, four-city bus trip raised nearly \$50,000 for non-profit organizations across the state.
- **Salvation Army** – Packers players and coaches join the Salvation Army’s bell ringers and sign autographs in exchange for donations.
- **Toys for Tots** – in 2008, \$5,700 and nearly 2,600 toys were collected at Lambeau Field

Players’ Foundations

A number of current Packers have charitable foundations that benefit Green Bay-area programs and residents.

- **The Donald Driver Foundation** – works to improve the educational system and assist homeless families in the Green Bay and Houston areas.
- **The Greg Jennings Foundation** – helps children and families to achieve their personal, professional, and financial goals.
- **James Jones’ “Love Jones 4 Kids Foundation”** – focuses on the needs of children in Green Bay and San Jose.
- **The Al Harris Foundation** – benefits inner-city kids in Pompano Beach, Florida and at-risk children in Wisconsin.

Youth Football Initiatives

- **NFL Grassroots** – Green Bay Southwest High School’s Dahlin Family Stadium received new bleachers due in part to a \$50,000 grant from the Packers, the NFL Youth Football Fund, and Local Initiatives Support Corporation.
- **NFL Player-Coach High School Football Grant** – Randy Wright, coach at Sturgeon Bay High School and a former Packer, received a \$7,000 grant for his program.

- **NFL Player Matching Youth/High School Football Grant Program** – current and former NFL players are able to make contributions to programs that are matched up to \$5,000. In 2008, seven grants totaling \$70,000 were awarded to Packers players for youth and high school programs across the country.
- **USA Football Equipment Grants** – through USA Football, the Packers donated football equipment to Denmark Youth Football and The Journey House of Milwaukee.
- **Youth Football Games at Lambeau Field** – the Packers annually invite Pop Warner leagues to play on the field during halftime of Packers games. In 2008, the Neighborhood Children’s Sports League of Milwaukee also participated in pregame and halftime activities.
- **High School Football Coach of the Week** – each week during the football season, the Packers honor a high school coach in Wisconsin with a \$1,000 grant for the school’s football program, and the annual Coach of the Year receives \$2,000.
- **USA Football Coaching School** – the Packers and USA Football jointly host a coaching clinic exclusively for youth and middle school football coaches.

Volunteer Recognition

Since 2000, the Packers have awarded a Community Quarterback Award to volunteers in order to recognize their leadership and dedication. In 2008, ten residents received \$2,000 grants.

Packers Women’s Association

Comprised of female Packers employees and the significant others of players, coaches, and staff members, the PWA provides time and resources to the community via outreach programs.

- **Paul’s Pantry Food Drive** – for more than 20 years, the PWA has collected more than 627,000 food items and \$214,000 for Paul’s Pantry, a food distribution program that serves the local area.
- **Football 101 Clinic** – geared towards female Packer fans, covering the basics of football and the lives of players and their families.
- **Military Appreciation Project** – the PWA created and sent care packages to more than two dozen Wisconsin soldiers in Iraq and Afghanistan.
- **Salvation Army’s Adopt-A-Family Program** – PWA members adopted 24 families that received holiday gifts and necessities, and in conjunction with Festival Foods, provided complete holiday dinners.
- **School Mentoring Program** – PWA volunteers mentored at-risk students of a Green Bay school.
- **Breast Cancer Awareness Event** – PWA members participated in the Breast Cancer Awareness Run/Walk.