



CITY COUNCIL PRESENTATION:

CAMP JORDAN SPORTS FACILITIES FEASIBILITY STUDY

June 27, 2024

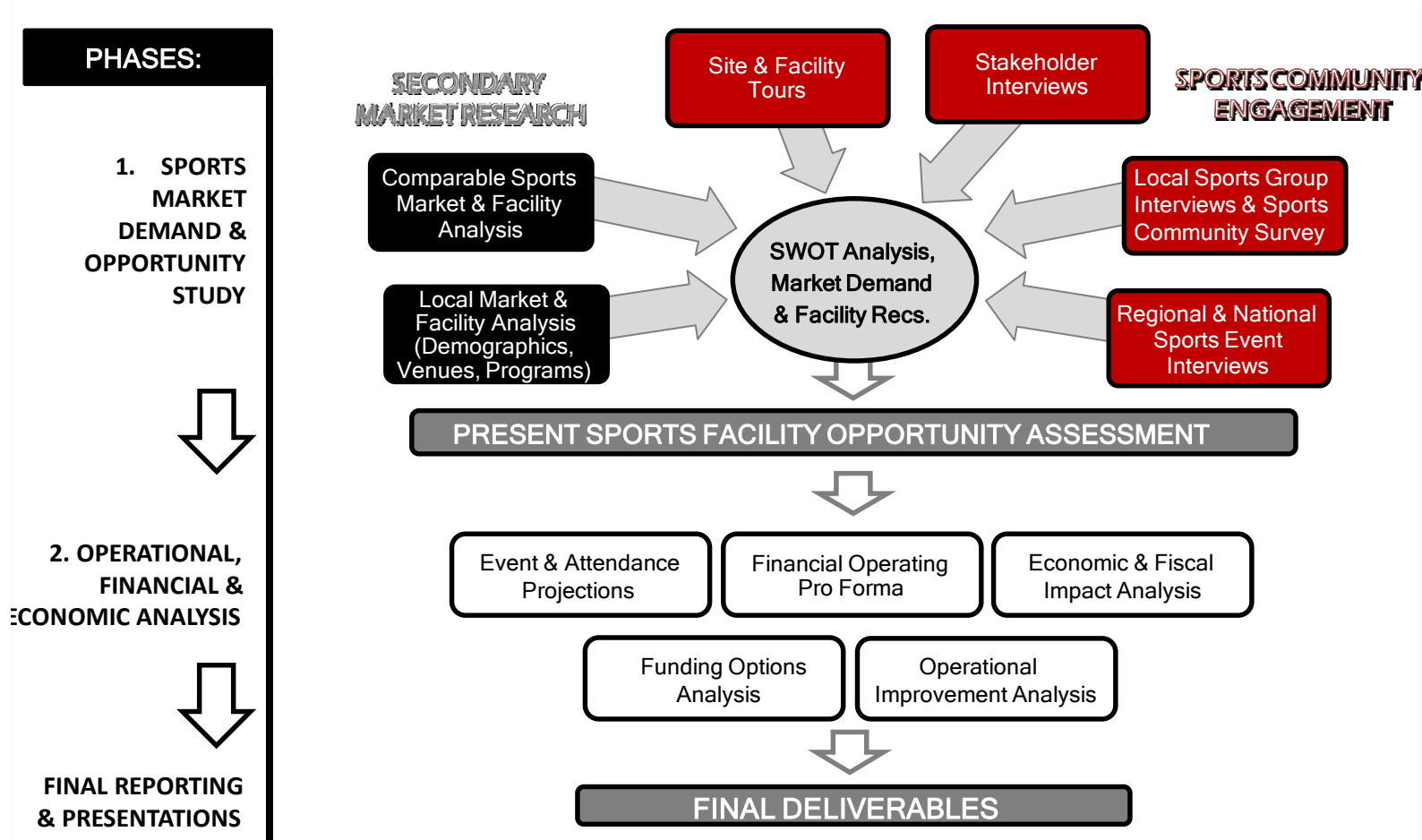




PROJECT BACKGROUND & APPROACH



Victus Advisors was engaged by the City of East Ridge to conduct a **Sports Facilities Feasibility Study** for potential expansion and/or enhancement of indoor and outdoor facilities located at **Camp Jordan Park**:





MARKET RESEARCH SUMMARY

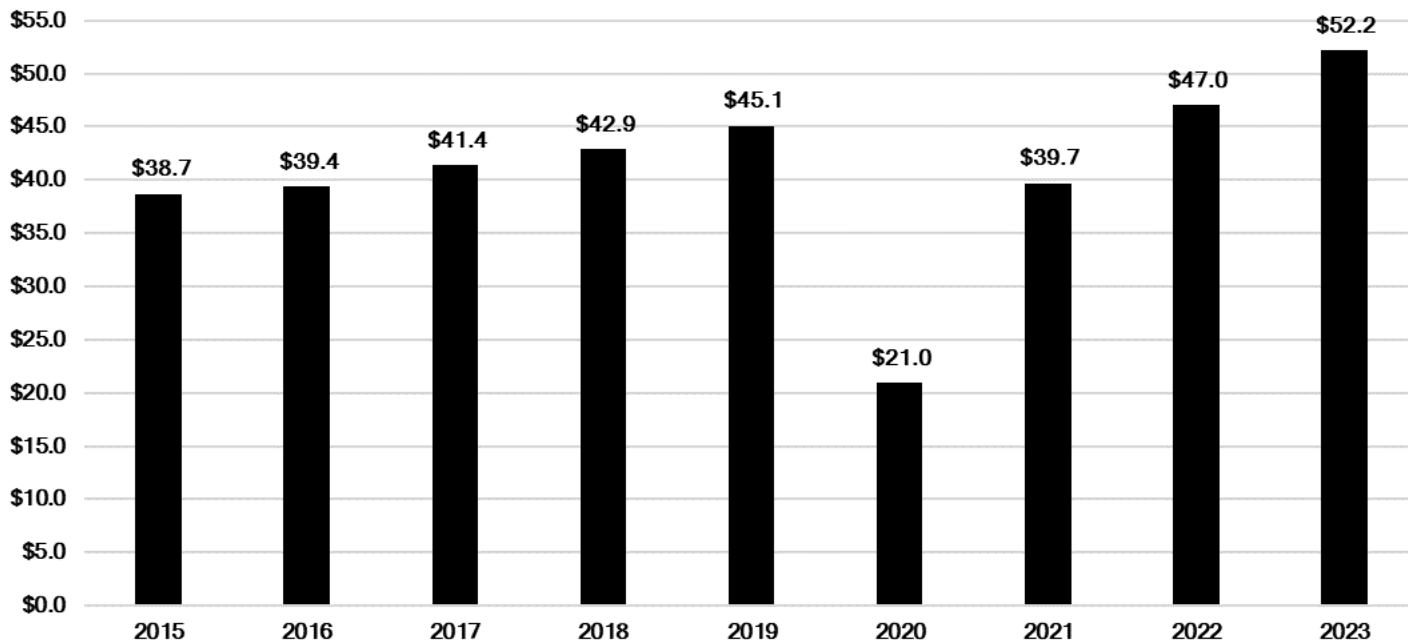


WHAT IS SPORTS TOURISM?



- Regional or national travel to observe or participate in a sporting event.
- Typical sports tourism traveler = family traveling via auto within a 5-6 hour drive range for youth sports tournaments.
- Sports tourism visitor spending is captured via hotel room nights, restaurants, retail, family entertainment, and cultural attractions.

Annual Sports Tourism Spending in the U.S. (Billions)



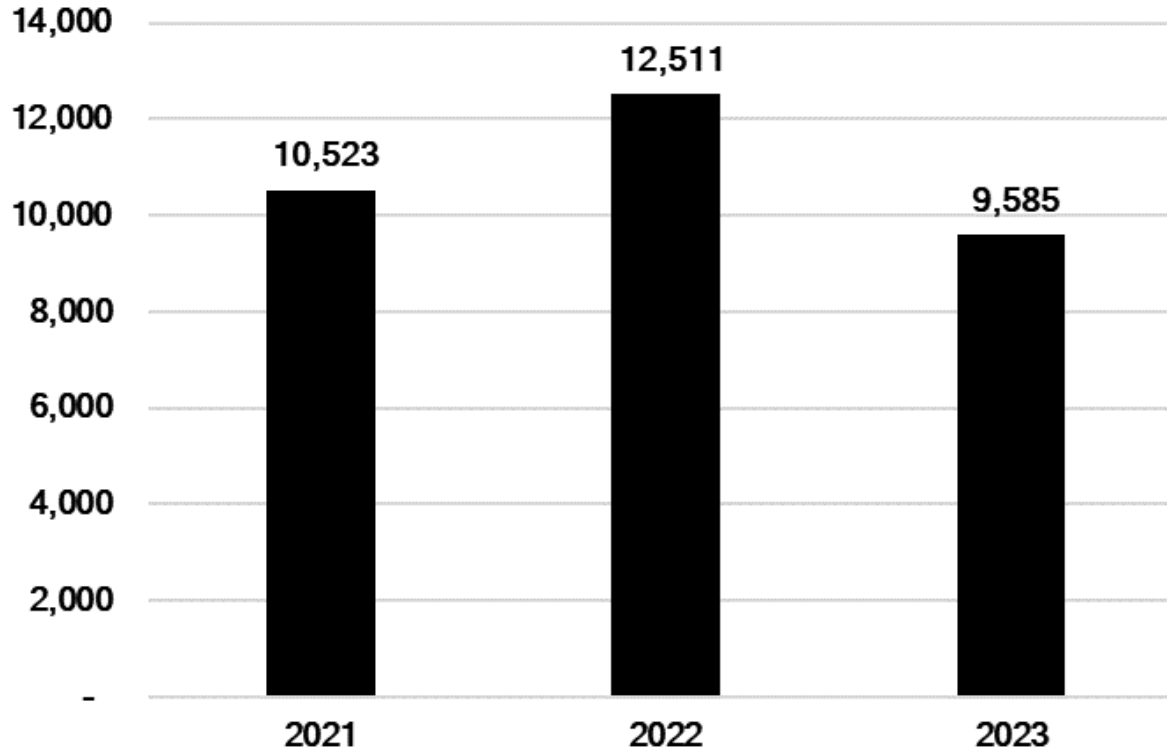
Source: Sports Events & Tourism Association (Sports ETA)



EXISTING CAMP JORDAN SPORTS TOURISM ACTIVITY: SPORTS CHATTANOOGA ROOM NIGHTS



Sports Chattanooga Room Nights Per Year



Source: Chattanooga Sports

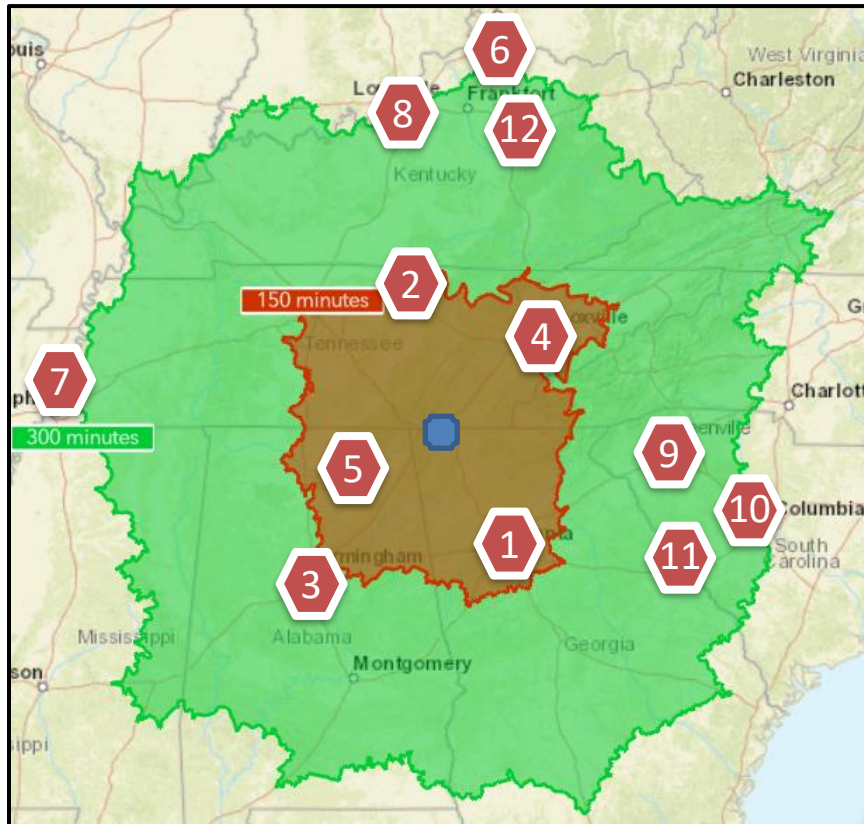
Note: Based on events brought in, supported, or created by Chattanooga Sports.

Sports Chattanooga events at Camp Jordan generated an average of 10,873 annual room nights.

Event Rain Outs: Due to lack of artificial turf, events held on Camp Jordan sports fields have been prone to rainouts. For example, in the first 4 months of 2024, 12 sports event days were cancelled due to rain.



REGIONAL TOURNAMENT DRIVE-TIME ZONES



Source: Esri

12.6 million people within a 2.5-hour drive

Over 28 million people within a 5-hour drive

Large MSAs (500K+ Pop) Within a 2-3 Hour Drive

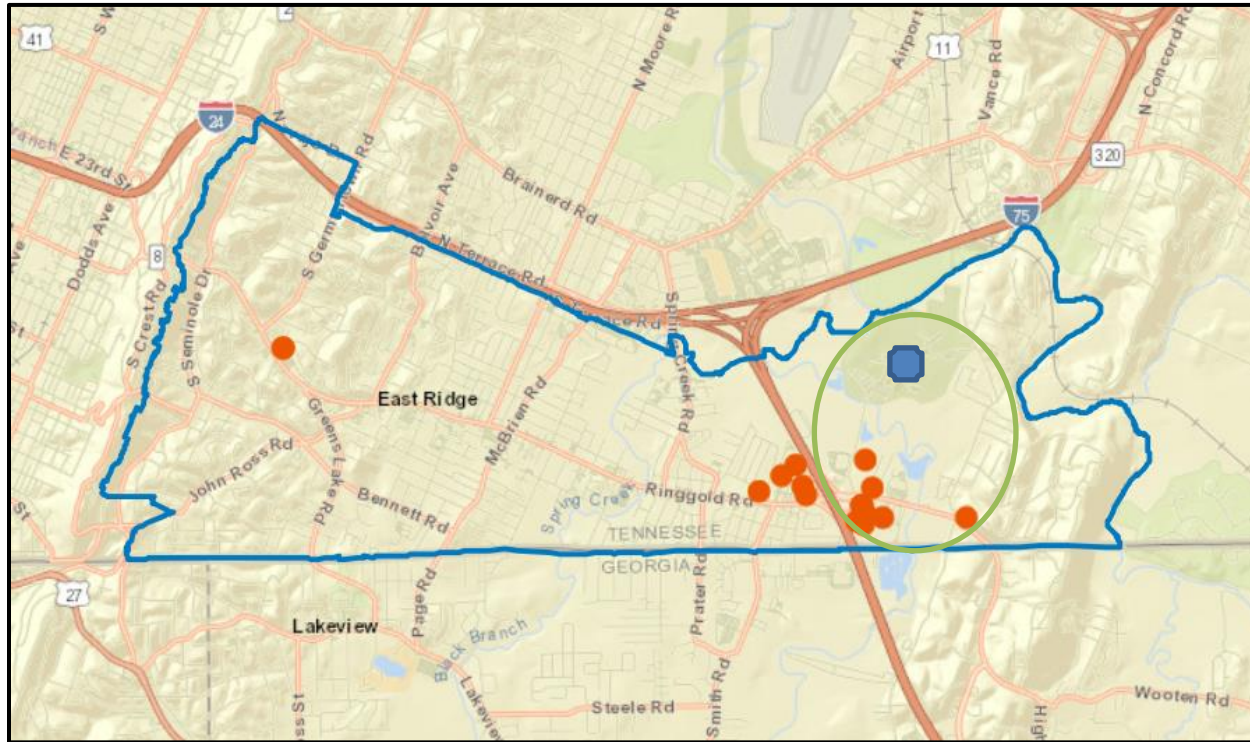
- 1 Atlanta MSA
6,313,755
- 2 Nashville MSA
2,116,378
- 3 Birmingham MSA
1,125,986
- 4 Knoxville MSA
903,964
- 5 Huntsville MSA
517,577

Large MSA's (500K+ Pop) Within a 5-6 Hour Drive

- 6 Cincinnati MSA
2,284,654
- 7 Memphis MSA
1,343,052
- 8 Louisville MSA
1,304,433
- 9 Greenville MSA
966,684
- 10 Columbia MSA
853,294
- 11 Augusta MSA
628,401
- 12 Lexington MSA
527,263



EAST RIDGE HOTEL MAP



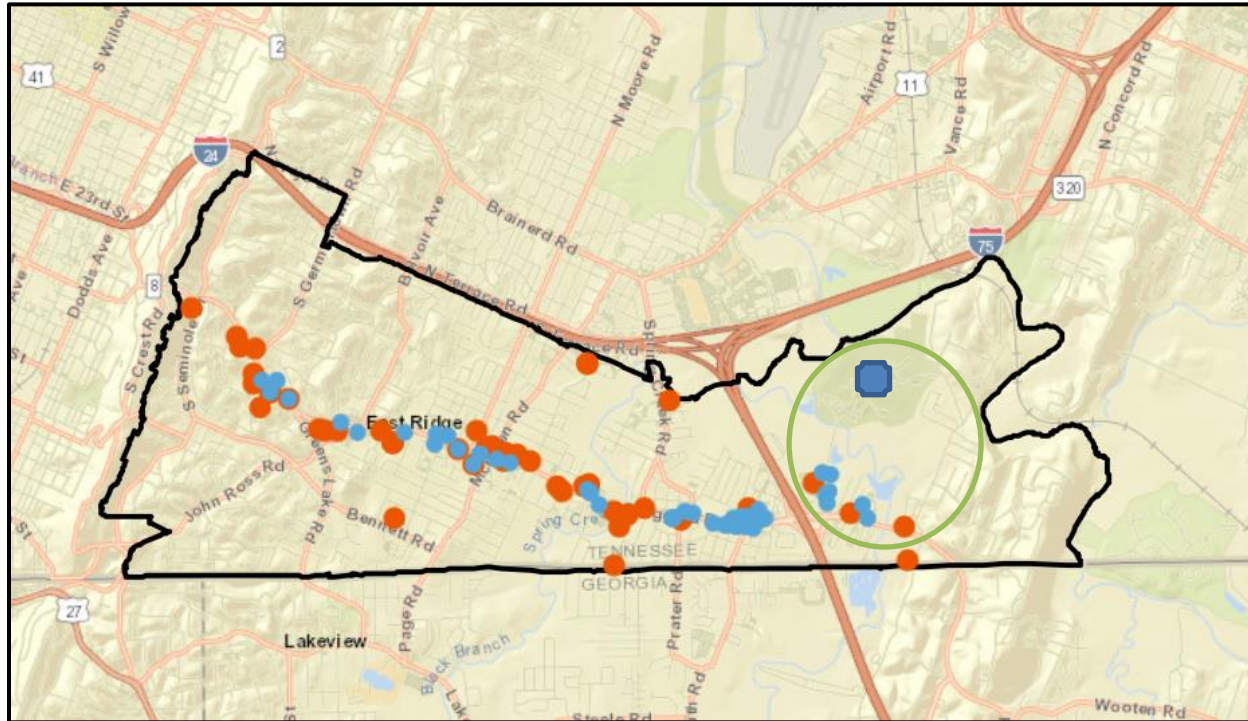
Source: Esri

Sports Tourism Key: Convenient, affordable, family-friendly lodging within 10-minute drive from venue.

Camp Jordan: Victus Advisors found numerous hotels (minimum 2-star hotel class) in East Ridge, including several that are conveniently located near the entrance to Camp Jordan Park.



RESTAURANT & RETAIL MAP



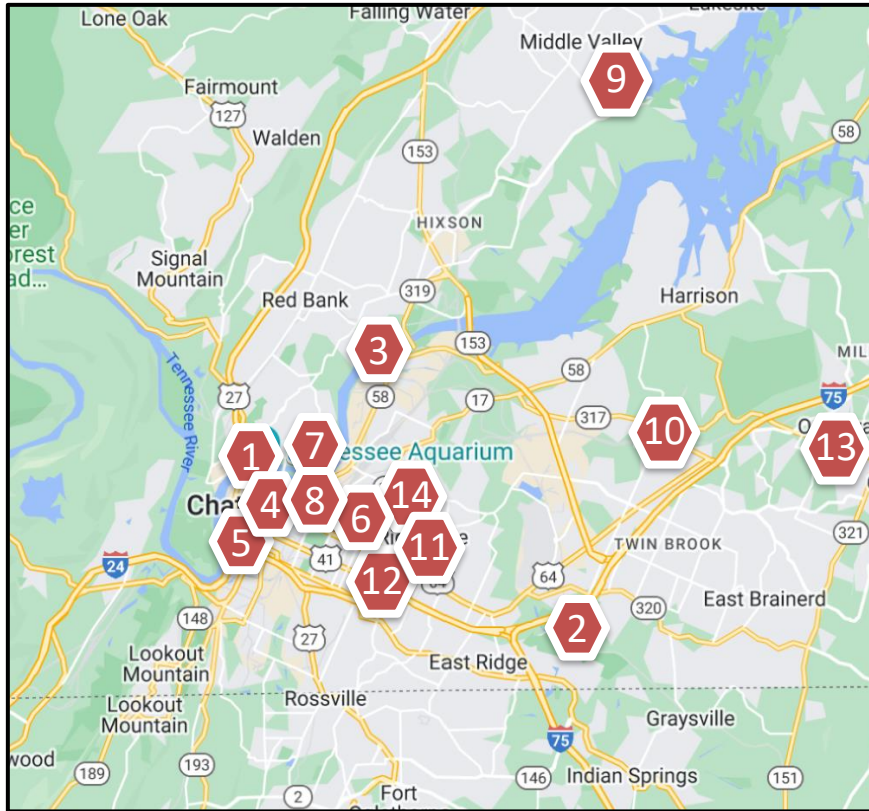
Source: Esri

Sports Tourism Key: Nearby food/beverage, retail, and family entertainment are an important component of attracting/hosting events.

Camp Jordan: Victus found numerous Dining, Retail, and Entertainment options within walking distance of Camp Jordan, such as Dairy Queen, Chick-fil-A, Jonathan's Grille, Bass Pro Shops, Top Golf, and more.



CHATTANOOGA SPORTS TOURISM FACILITIES



Facility
1 AT&T Field
2 Camp Jordan
3 Champions Club Tennis Complex
4 Chattanooga Convention Center
5 Finley Stadium
6 Frost Stadium
7 Girls Preparatory School Tennis Center
8 McKenzie Arena
9 Middle Valley Park
10 Redoubt Soccer Complex
11 Spears Stadium
12 Strang-Voges Tennis Center
13 Summit of Softball Complex
14 Warner Park Softball Complex

Note: Sorted by Facility in alphabetical order

**Please note: This list represents 14 sports tourism facilities marketed by Chattanooga Sports.*



CHATTANOOGA SPORTS TOURISM ACTIVITY: EVENTS BY FACILITY



Sports Tourism Events Per Year

<u>Facility</u>	<u>Total Events ('21-'23)</u>	<u>Average Annual Events</u>
Camp Jordan	45	15
Summit of Softball Complex	44	15
Champions Club Tennis Complex	23	8
Chattanooga Convention Center	15	5
Finley Stadium	7	2
Warner Park Softball Complex	7	2
Girls Preparatory School Tennis Center	3	1
Redoubt Soccer Complex	3	1
Spears Stadium	3	1
Strang-Voges Tennis Center	3	1
Frost Stadium	2	1
McKenzie Arena	2	1
Middle Valley Park	2	1
AT&T Field	1	1

Source: Chattanooga Sports

(1) Sorted by Average Annual Events in descending order

(2) Based on events brought in, supported, or created by Chattanooga Sports.

Camp Jordan has hosted the most Chattanooga Sports tourism events in the last 3 years.

On average, Camp Jordan hosts approximately 15 sports tourism events per year.



COMPARATIVE SPORTS TOURISM FACILITIES



All of these facilities below were identified by regional/national event organizers as relevant examples for East Ridge to consider.

These venues have a minimum of six (6) baseball or softball diamonds, seven (7) rectangular fields, or six (6) multi-use indoor courts.

Facility

- 1 Birmingham CrossPlex
- 2 Elizabethtown Sports Park
- 3 Foley Sports Complex
- 4 Foley Sports Tourism Complex
- 5 Grand Park Sports Campus
- 6 LakePoint Sports
- 7 Manchester Meadows Park
- 8 Memphis Sports & Events Center
- 9 Myrtle Beach Sports Center
- 10 Pacers Athletic Center
- 11 Richard Siegel Soccer Complex
- 12 Rock Hill Sports & Events Center
- 13 Rocky Top Sports World
- 14 Round Rock Sports Center
- 15 The Ripken Experience Pigeon Forge
- 16 USSSA Space Coast Complex

Note: Sorted in alphabetical order





FACILITY SUMMARY: INDOOR SPORTS CENTERS



<u>Facility</u>	<u>Location</u>	<u>Owner</u>	<u>Operator</u>	<u>Basketball Courts*</u>	<u>Volleyball Courts**</u>
Camp Jordan	East Ridge, TN	Public	Public	-	-
Birmingham Crossplex	Birmingham, AL	Public	Private	-	9
LakePoint Sports	Emerson, GA	Private	Private	12	24
Memphis Sports & Events Center	Memphis, TN	Public	Private	8	16
Myrtle Beach Sports Center	Myrtle Beach, SC	Public	Private	8	16
Pacers Athletic Center	Westfield, IN	Private	Private	8	10
Rock Hill Sports & Events Center	Rock Hill, SC	Public	Public	10	18
Rocky Top Sports World	Gatlinburg, TN	Public	Private	6	12
Round Rock Sports Center	Round Rock, TX	Public	Public	6	12
HIGH				12	24
AVERAGE				8.3	14.6
LOW				6	9

Sources: Facility operators; Victus Advisors research

Notes: (1) Sorted by Facility in alphabetical order. (2) High, Average, and Low do not include Camp Jordan.

* Represents permanent hardwood basketball courts. It should be noted that Memphis can also set up an additional 8 courts via portable plastic sport court tiles.

** Volleyball courts are overlayed on basketball courts.

Comparable indoor sports tourism facilities have at least six (6) basketball courts and/or at least 9 volleyball courts. On average, they have 8.3 basketball courts and 16.6 volleyball courts.

Comparatively, Camp Jordan does not currently have any basketball/volleyball courts.



FACILITY SUMMARY: OUTDOOR SPORTS COMPLEXES



Facility	Location	Owner	Operator	Rectangular Fields	Ball Diamonds
Camp Jordan	East Ridge, TN	Public	Public	14	13
Elizabethtown Sports Park	Elizabethtown, KY	Public	Public	12	12
Foley Sports Complex	Foley, AL	Public	Public	5	10
Foley Sports Tourism Complex	Foley, AL	Public	Public	16	-
Grand Park Sports Campus	Westfield, IN	Public	Private	31	26
LakePoint Sports	Emerson, GA	Private	Private	3	8
Manchester Meadows Park	Rock Hill, SC	Public	Public	8	-
Richard Siegel Soccer Complex	Murfreesboro, TN	Public	Private	20	-
Rocky Top Sports World	Gatlinburg, TN	Public	Private	7	-
The Ripken Experience Pigeon Forge	Pigeon Forge, TN	Public	Private	-	6
USSSA Space Coast Complex	Viera, FL	Private	Private	-	15
HIGH				31	26
AVERAGE				12.8	12.8
LOW				3	6

Sources: Facility operators; Victus Advisors research

Notes:

(1) Sorted by Facility in alphabetical order

(2) High, Average, and Low do not include Camp Jordan

Comparable outdoor sports tourism complexes average more than twelve (12) rectangular fields and more than twelve (12) baseball/softball diamonds.

Comparatively, Camp Jordan is above average in terms of rectangular fields (14) and diamonds (13).



FACILITY SUMMARY: RECTANGULAR FIELDS (ARTIFICIAL TURF & LIGHTS)



Facility	Location	RECTANGULAR FIELDS				
		Artificial Turf Fields	Grass Fields	% Artificial Turf	Lighted Fields	% Lighted Fields
Camp Jordan	East Ridge, TN	-	14	0%	8	57%
Elizabethtown Sports Park	Elizabethtown, KY	2	10	17%	8	67%
Foley Sports Complex	Foley, AL	-	5	0%	-	0%
Foley Sports Tourism Complex	Foley, AL	-	16	0%	16	100%
Grand Park Sports Campus	Westfield, IN	24	7	77%	8	26%
LakePoint Sports	Emerson, GA	3	-	100%	3	100%
Manchester Meadows Park	Rock Hill, SC	2	6	25%	2	25%
Richard Siegel Soccer Complex	Murfreesboro, TN	7	13	35%	18	90%
Rocky Top Sports World	Gatlinburg, TN	6	1	86%	6	86%
The Ripken Experience Pigeon Forge	Pigeon Forge, TN	6	-	100%	6	100%
HIGH		24	16	100%	18	100%
AVERAGE		7.1	8.3	46%	8.4	62%
LOW		2	1	0%	2	0%

Sources: Facility operators; Victus Advisors research

Notes:

(1) Sorted by Facility in alphabetical order

(2) High, Average, and Low do not include Camp Jordan

Nearly half of the rectangular fields we profiled are artificial turf, while 62% of the fields are lit.

Comparatively at Camp Jordan, none of the rectangular fields are artificial turf, and 57% of the existing grass fields are lit.



FACILITY SUMMARY: DIAMOND FIELDS (ARTIFICIAL TURF & LIGHTS)



Facility	Location	DIAMOND FIELDS				
		Artificial Turf Fields	Grass Fields	% Artificial Turf	Lighted Fields	% Lighted Fields
Camp Jordan	East Ridge, TN	-	13	0%	13	100%
Elizabethtown Sports Park	Elizabethtown, KY	12	-	100%	12	100%
Foley Sports Complex	Foley, AL	-	10	0%	10	100%
Grand Park Sports Campus	Westfield, IN	8	18	31%	8	31%
LakePoint Sports	Emerson, GA	8	-	100%	8	100%
USSSA Space Coast Complex	Viera, FL	13	-	100%	13	100%
HIGH		13	18	100%	13	100%
AVERAGE		10.3	14.0	59%	10.2	74%
LOW		8	10	0%	8	31%

Sources: Facility operators; Victus Advisors research

Notes:

(1) Sorted by Facility in alphabetical order

(2) High, Average, and Low do not include Camp Jordan

As 59% of the diamond fields we profiled are artificial turf, while 74% of the fields are lit.

Comparatively at Camp Jordan, none of the diamonds have artificial turf, and 100% of the existing diamonds are lit.



KEY TAKEAWAYS & CONCLUSION: STAKEHOLDER & EVENT INTERVIEWS



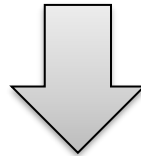
- **General Feedback:** Most felt that the facilities at Camp Jordan are outdated, as many mentioned the specific need for artificial turf on both rectangular fields and ball fields. Additionally, multiple stakeholders mentioned that East Ridge lacks the indoor facilities to accommodate indoor sports tourism events (e.g. basketball and volleyball tournaments).
- **Flooding of Fields:** Flooding is an issue at Camp Jordan Park when it rains. Interviewees mentioned that they would like to see improved drainage system and a conversion of both rectangular fields and ball fields to artificial turf. Event organizers confirmed this would help avoid weather cancellations.
- **Staff:** Interviewees spoke very highly of the staff at Camp Jordan Park. One interviewee stated that Camp Jordan is their favorite facility because of the staff, as they are communicative and responsive.
- **Perception of East Ridge as a Sports Tourism Destination:** Interviewees felt strongly about East Ridge as a destination for sports tournaments and events. Interviewees mentioned that Camp Jordan is an ideal location right off I-75, with nearby hotels, restaurants, retail, and entertainment.
- **Indoor Sports Center Demand:** There is strong demand to add an indoor facility with multiple, multi-use courts for basketball, cheer, wrestling, and volleyball tournaments.
- **Potential Partnerships:** Interviewees stated that Hamilton County has a strong partnership with the City of Chattanooga and felt a similar partnership could be developed with the City of East Ridge.



LOCAL SPORTS COMMUNITY SURVEY: AMATEUR SPORTS DESTINATIONS



Market	% Chosen as Best
Gatlinburg, TN	13%
Murfreesboro, TN	10%
Emerson, GA	6%
Dalton, GA	6%



Reason for Choosing Best Community	Percent Chosen
Quality of sports facilities	70%
Community interest/support for amateur sports events	13%
Nearby family entertainment/attractions	5%
Accessibility (ease of travel/transportation access)	5%
Nearby restaurant/dining options	4%
Nearby hotel/lodging options	2%
Climate/weather	1%

Base: 113 respondents

13% of respondents chose Gatlinburg (including Pigeon Forge) as the destination that does the best overall job as an amateur sports host.

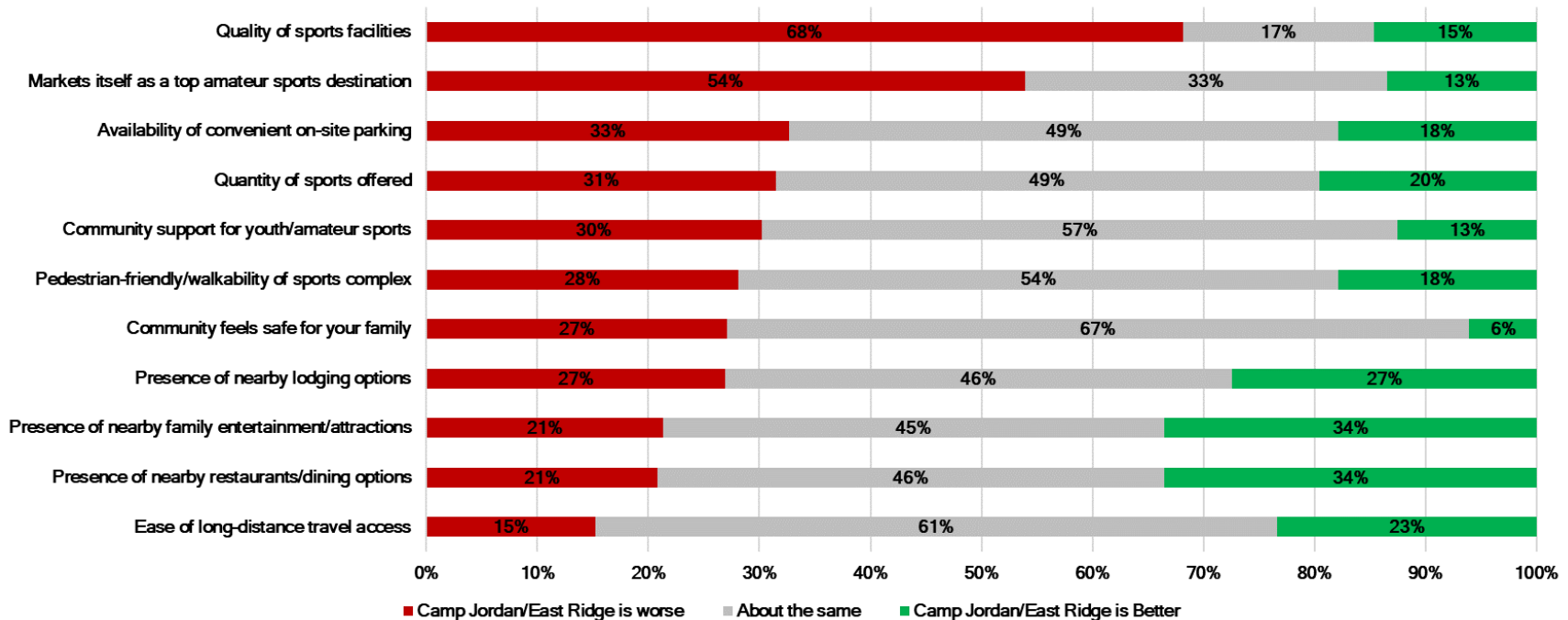
70% of respondents cited **Quality of sports facilities** as the primary reason in determining the best overall job as an amateur host.

The finding that the #1 factor (70%) is providing a high-quality sports facility is consistent with Victus Advisors' findings on similar projects across the country.

As is the secondary importance (13%) of playing in a location where there is local interest and excitement surrounding the event.



LOCAL SPORTS COMMUNITY SURVEY: CAMP JORDAN VS. OTHER DESTINATIONS



Note: Sorted by 'Camp Jordan/East Ridge is Worse' in descending order Base: 198 respondents

Respondents rated Camp Jordan and East Ridge poorly as a sports destination (relative to other sports travel destinations they've visited) in terms of the **Quality of sports facilities** and **Markets itself as a top amateur sports destination**.

However, Camp Jordan/East Ridge was rated higher than other destinations in terms of the **Presence of Nearby Lodging, Family Entertainment, and Restaurants**, as well as **Ease of Travel Access**.



EAST RIDGE SPORTS TOURISM SWOT ANALYSIS



Strengths

1. Strong Hotel/Dining/Entertainment Inventory
2. Successful Track Record of Hosting Sports Tourism Events
3. Convenient Location & Access
4. Camp Jordan Staff

Weaknesses

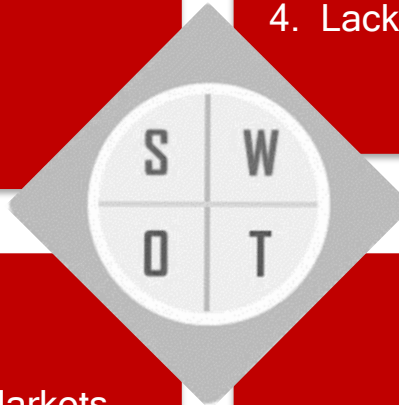
1. Outdated Facilities at Camp Jordan
2. Flooding at Camp Jordan
3. Lack of Municipal Marketing Support
4. Lack of Indoor Sports Courts

Opportunities

1. Attract More Visitors from Drive Markets
2. Opportunities to Expand Existing Outdoor Events
3. Lack of an Indoor Sports Tourism Facility in the Chattanooga Market
4. Demand for Indoor Sports Court Facility at Camp Jordan

Threats

1. Regional Facility Competition
2. Future Facility Construction





SPORTS FACILITY OPPORTUNITY ANALYSIS FOR CAMP JORDAN



CAMP JORDAN RECOMMENDATIONS



Immediate Improvements to Existing Sports Infrastructure:

- Fix drainage/flooding issues
- Upgrade restrooms and concessions
- A/V improvements

Opportunity 1 - Upgraded Outdoor Sports Complex:

- **Features:** Conversion of six (6) rectangular fields and six (6) ball diamonds to artificial turf. It is recommended that all of the artificial turf fields should have lights.
- **Usage:** Local and tournament usage for outdoor field sports such as baseball, softball, soccer, football, lacrosse, and other sports programming.

Opportunity 2 - New Indoor Sports Center:

- **Features:** 10 hardwood basketball courts, convertible to 16-20 volleyball courts, as well as capabilities for other sports uses such as pickleball, wrestling, cheer, etc.
- **Usage:** Local and tournament usage for indoor sports such as basketball, volleyball, pickleball and other sports programming.
- **Building Size:** Approximately 150,000 square feet



UPGRADED OUTDOOR COMPLEX: INCREMENTAL PARKS & RECREATION PARTICIPATION



Program	ANNUAL PARTICIPANTS		
	2023	Upgraded Increment	Stable Year
Adult Softball	65	10	75
Baseball/Teeball	644	31	675
Big League Baseball	62	38	100
Cheerleading	27	23	50
Flag Football	166	34	200
Soccer	1,003	297	1,300
Softball	323	27	350
TOTAL	2,290	460	2,750

Source: East Ridge Parks & Recreation

Note: Sorted by Program in alphabetical order

Victus estimates that the conversion of six (6) rectangular fields and six (6) ball diamonds to artificial turf would expand parks and recreation program participation by 20%.

This is principally due to the fact that seasons and leagues could be expanded with fewer weather cancellations, less down time for field recovery, and greater overall access to lighted artificial turf fields.



UPGRADED OUTDOOR COMPLEX: INCREMENTAL ANNUAL UTILIZATION



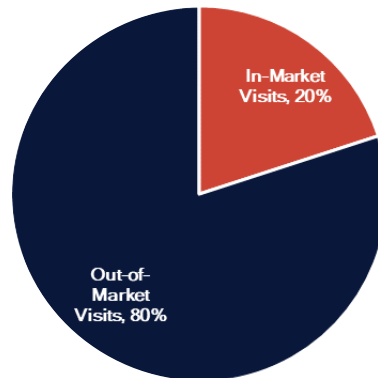
ANNUAL INCREMENTAL SPORTS TOURNAMENTS/EVENTS

Victus estimates at least 15 incremental sports tournaments/events per year with an upgraded outdoor complex.

Venue	ANNUAL EVENTS		
	2023-2024 Average	Upgraded Increment	Stable Year
Diamond Fields	33	7	40
Rectangular Fields	12	8	20
TOTAL	45	15	60

INCREMENTAL OUT-OF-MARKET VISITATION

	TOTAL
In-Market Visits	16,000
Out-of-Market Visits	65,000
TOTAL VISITORS	81,000



It is estimated that visitors from outside of the Chattanooga area could account for about 80% of incremental annual attendance at upgraded outdoor fields.

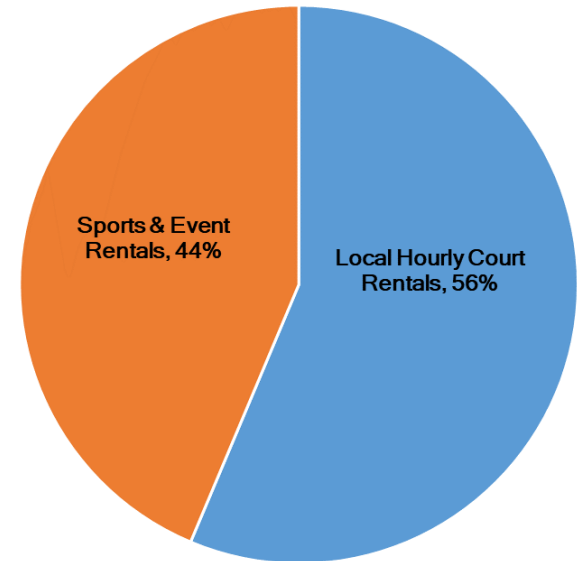


NEW INDOOR SPORTS CENTER: ESTIMATED ANNUAL UTILIZATION



Event	Facility Hours
Tournament Rentals	3,800
Local Hourly Court Rentals	3,100
TOTAL	6,900

Note: Sorted by Facility Hours in descending order



Estimated Annual Sports Tournaments: 22

Total Estimated Annual Visits: 302,400*

- * Includes estimated athletes, officials, coaches, parents/family, spectators, etc. Represents unique daily visits. For example, if an athlete participated in practices on a Tuesday and a Thursday one week, that would count as two (2) unique visits that week*



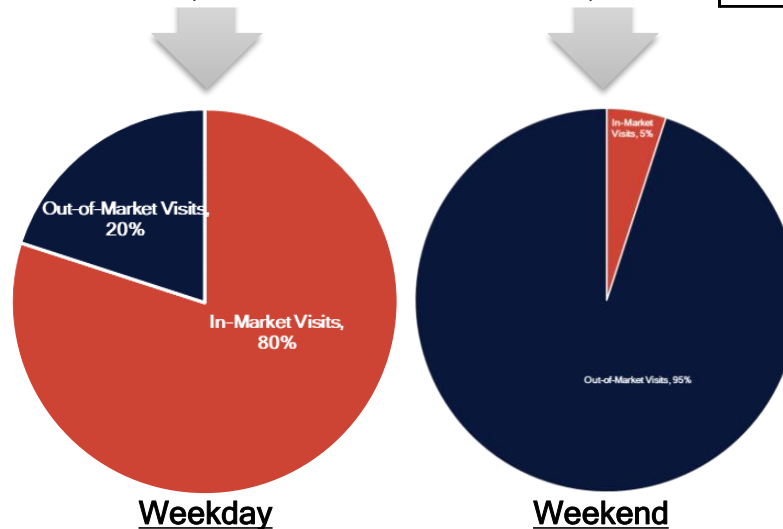
NEW INDOOR SPORTS CENTER: TOTAL ESTIMATED OUT-OF-MARKET VISITATION



It is estimated that visitors from outside of the Chattanooga MSA could account for about 63% of annual attendance at a potential indoor sports center.

It is assumed that weekday usage would primarily be regional programming, including youth and adult sports. Whereas weekend use would primarily be dedicated to youth/amateur sports tournaments.

	<u>Weekday</u>	<u>Weekend</u>	<u>TOTAL</u>
In-Market Visits	104,400	8,600	113,000
Out-of-Market Visits	26,100	163,300	189,400
TOTAL VISITORS	130,500	171,900	302,400



**Notes: (1) "Out-of-market" refers to visitors from outside the Chattanooga MSA. (2) Visitors include estimated athletes, officials, coaches, parents/family, spectators, etc. Visitors also represent unique daily visits. For example, if an athlete participated in practices on a Tuesday and a Thursday one week, that would count as two (2) unique visits that week.*



KEY **STRENGTHS** FOR CURRENT CAMP JORDAN OPERATIONS

CAMP JORDAN STAFF

- Existing tournament/event organizers spoke very highly of the staff at Camp Jordan Park. Tournament organizers said the staff is communicative and responsive.

SUCCESSFUL SPORTS TOURISM ACTIVITY

- According to Chattanooga Sports data, Camp Jordan is one of the most productive sports tourism venues in the Chattanooga market, with more than 10,800 annual room nights and over \$13 million in annual estimated economic impact (for Chattanooga Sports events).

KEY **WEAKNESSES** FOR CURRENT CAMP JORDAN OPERATIONS

LACK OF A SPORTS COMPLEX & SPORTS DESTINATION BRAND

- Despite Camp Jordan's many successes as a sports tournament facility, the facility has had limited funding and outreach from a sports marketing and branding standpoint. As a result, the local and regional perception of the facility is limited relative to its actual level of activity and use.

STRAIN ON CURRENT STAFF FROM WEATHER-RELATED ISSUES

- East Ridge Parks & Recreation staff are often in "all hands-on deck" modes when weather can affect cancellation of events. Staff often has to rake and prepare grass fields and dirt infields at the last minute due to weather.



Updated Outdoor Sports Complex - Victus recommends that the East Ridge Parks & Recreation department should continue as operator. The staff has established a local and regional reputation for servicing programs and events and is a key strength of Camp Jordan.

New Indoor Sports Center - For a new indoor facility, the City will have the option of:

- a) operating it via their Parks & Recreation department,
 - b) partnering with the County for operations of the indoor facility, or
 - c) hiring a private management firm.
- While operating the new indoor facility within the City's Parks & Recreation department is certainly a viable option (with many of the same pros/cons as previously discussed), it may be necessary for the City to explore other options if funding of construction of a new indoor sports center requires new public-public and/or public-private partnerships.
 - For example, County could help to operate Camp Jordan through a joint partnership and thus provide additional staffing and financial/funding resources given that the complex will be a significant sports tourism driver for Hamilton County.

Increased Sports Marketing Efforts - Regardless of eventual operating model for the indoor sports center, it will be important for the City to improve the long-term success for a renovated Camp Jordan and/or a new indoor sports center at Camp Jordan by investing in marketing/branding efforts to position the Camp Jordan Sports Complex as a premier regional destination for sports tournaments in activities.



ECONOMIC & FISCAL IMPACTS OF CAMP JORDAN IMPROVEMENTS



ESTIMATED INCREMENTAL ANNUAL ECONOMIC IMPACTS



Facility Option	VISITATION & SPENDING		ANNUAL ECONOMIC IMPACTS			HOTEL IMPACTS
	Estimated Annual Out-of-Market Visitors	Estimated Net New Direct Spending (1)	Total Output	Employment	Labor Income	Estimated Annual Hotel Nights
Upgraded Outdoor Fields	61,000	\$5,420,000	\$8,993,000	145	\$8,604,000	15,000
Indoor Sports & Events Center	189,000	\$12,024,000	\$21,089,000	343	\$20,167,000	38,000
TOTAL	250,000	\$17,444,000	\$30,082,000	488	\$28,771,000	53,000

Notes: (1) Only includes direct spending by visitors from outside of Hamilton County (2) Assumes 1.5 nights per out-of-county visitor, and average daily room rate of \$95

It is estimated that the operations of the proposed new and improved sports tourism facilities at Camp Jordan could generate the following impacts within Hamilton County on an annual basis:

- \$30.1 million in combined annual economic output
- 488 combined sustainable annual jobs
- \$28.8 million in combined annual labor income
- 53,000 combined annual hotel nights



NET PRESENT VALUE OF 30-YEAR FISCAL IMPACTS



Model	FISCAL IMPACTS			
	County Sales Tax (1.125%)	County Hotel Tax (4%)	City Sales Tax (1.125%)	City Hotel Tax (4%)
Upgraded Outdoor Fields	\$1,341,000	\$1,276,000	\$1,211,000	\$1,082,000
Indoor Sports Center	\$2,920,000	\$3,158,000	\$2,639,000	\$2,682,000
TOTAL	\$4,261,000	\$4,434,000	\$3,850,000	\$3,764,000
			\$7,614,000	

Notes: (1) Assumptions include 3.0% annual inflation and 4.5% discount rate. (2) Represents new full- and part-time jobs sustained on an annual basis.

Over a 30-year period, it is estimated that the proposed new and improved sports tourism facilities at Camp Jordan could generate overall long-term impacts with a net present value (NPV) of:

- \$7.6 million in combined City sales and hotel taxes
- \$8.7 million in combined County sales and hotel taxes



VICTUS ADVISORS LLC

2720 Homestead Road
Suite 130
Park City, Utah 84098

(435) 776-5728

www.victusadvisors.com