



SITE ANALYSIS UPDATE FOR A POTENTIAL NEW INDOOR YOUTH AND AMATEUR SPORTS COMPLEX

In Chatham County, Georgia

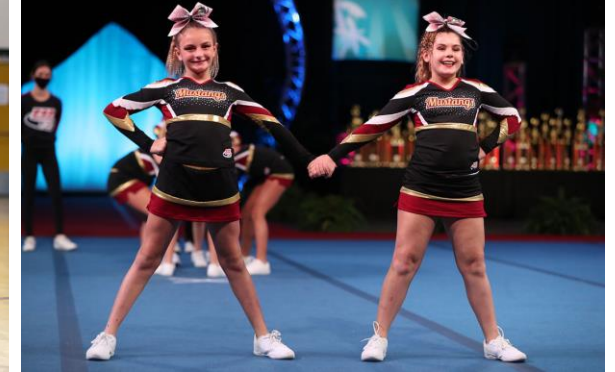
September 28, 2023

SITE ANALYSIS: Overview

Conventions, Sports & Leisure International (CSL) had been retained by CHA Consulting (CHA), on behalf of Chatham County, in 2022 to conduct a feasibility study of a potential new Indoor Youth and Amateur Sports Complex in Chatham County. The purpose of the study was to assist CHA, Chatham County and other stakeholders in evaluating key market, program, financial and economic aspects of the proposed new Indoor Youth and Amateur Sports Complex.

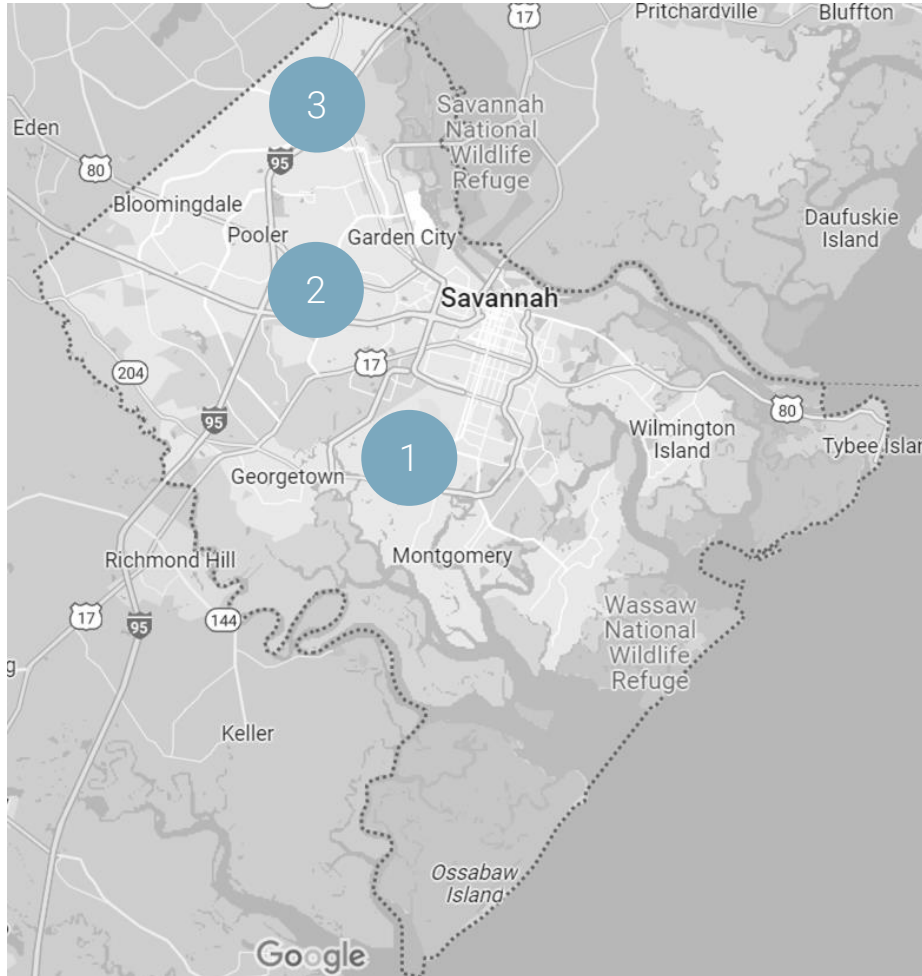
As part of that study, seven (7) potential site locations in Chatham County were identified, based on conversations with County representatives and other project stakeholders for development of an Indoor Youth and Amateur Sports Complex. From this list, three (3) sites were targeted for further consideration including Southchase, Tom Triplett Park and Port Wentworth.

The Updated Analysis on the following pages provides additional comparative data on demographic and socioeconomic characteristics as well as information on visitor industry infrastructure such as hotels, restaurants and entertainment options of the areas immediately surrounding each site.



SITE ANALYSIS: Potential Sites

Conversations with County representatives and other project stakeholders originally identified seven (7) potential site locations for development of an Indoor Youth and Amateur Sports Complex in Chatham County. Preliminary analysis was able to identify three (3) potential site locations for further review, as presented below.



1

SOUTHCHASE:

Ownership – Chatham County
Size – 16 acres

2

TOM TRIPLETT PARK:

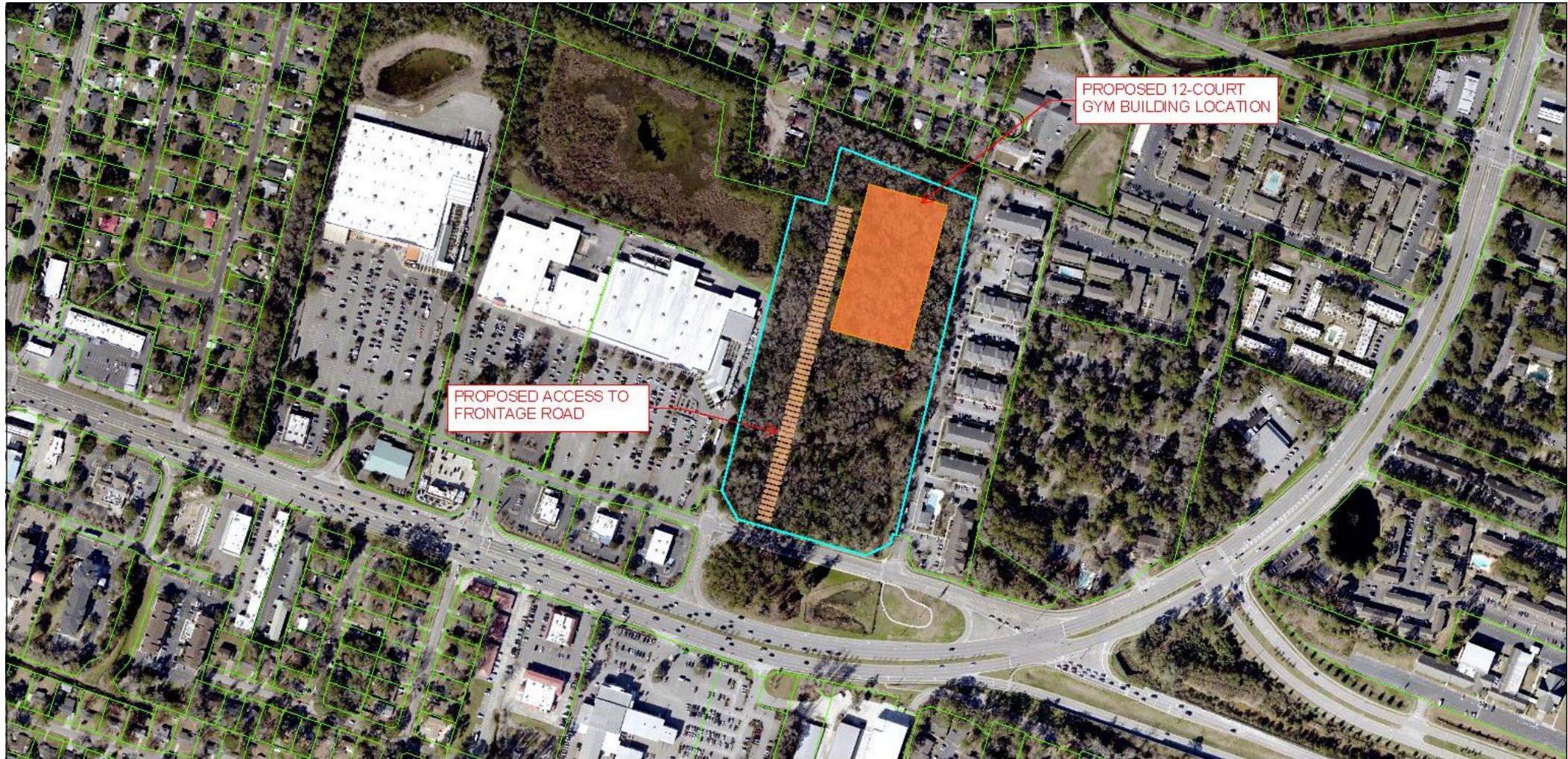
Ownership – Chatham County
Size – 178 acres

3

PORT WENTWORTH RECREATION COMPLEX :

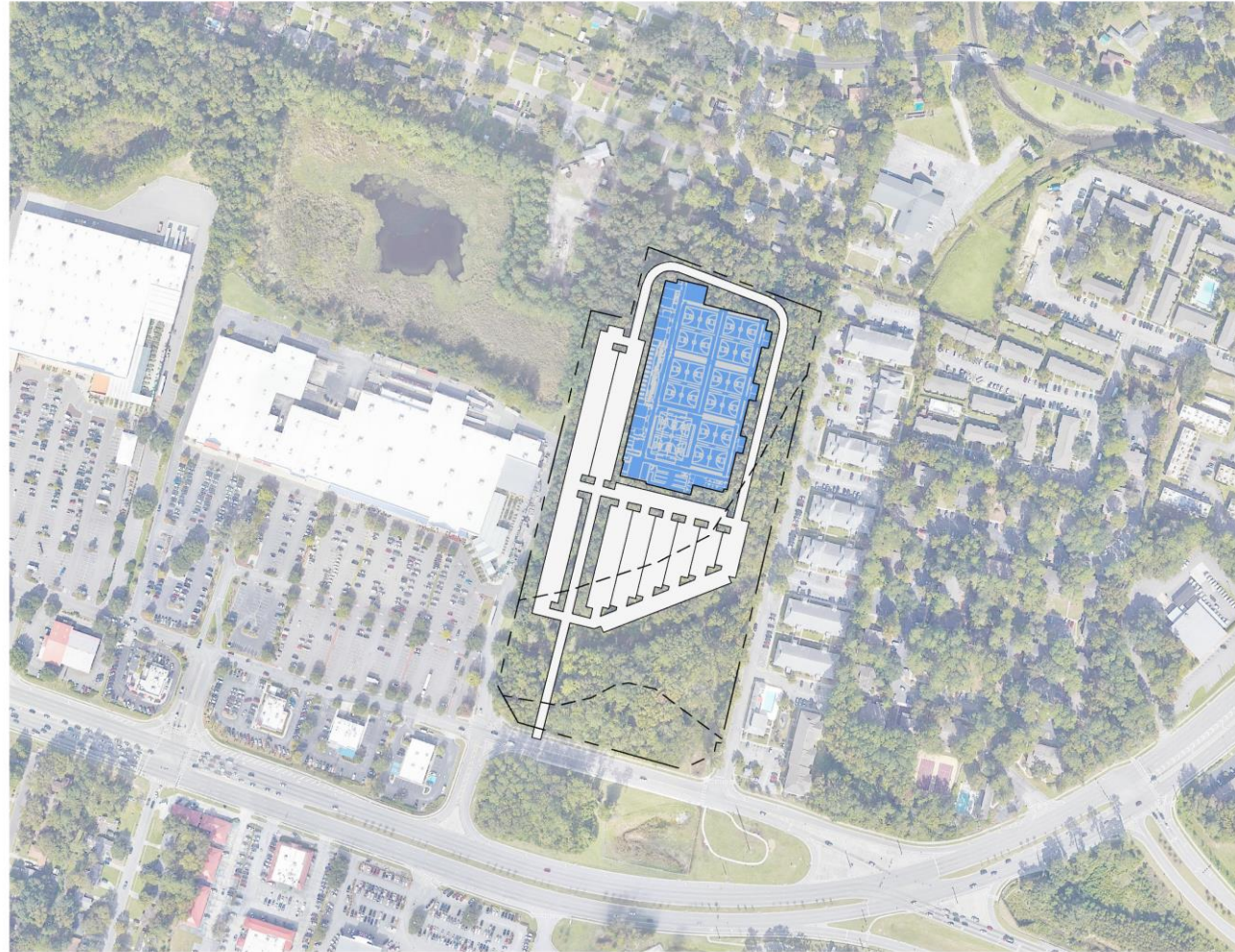
Ownership – City of Port Wentworth
Size – 200+ acres

SITE ANALYSIS: Southchase Site – Potential Facility Placement



SITE ANALYSIS: Southchase Site – Potential Facility Layout

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SITE ANALYSIS: Tom Triplett Park Site – Potential Facility Placement



SITE ANALYSIS: Tom Triplett Park Site – Potential Facility Layout

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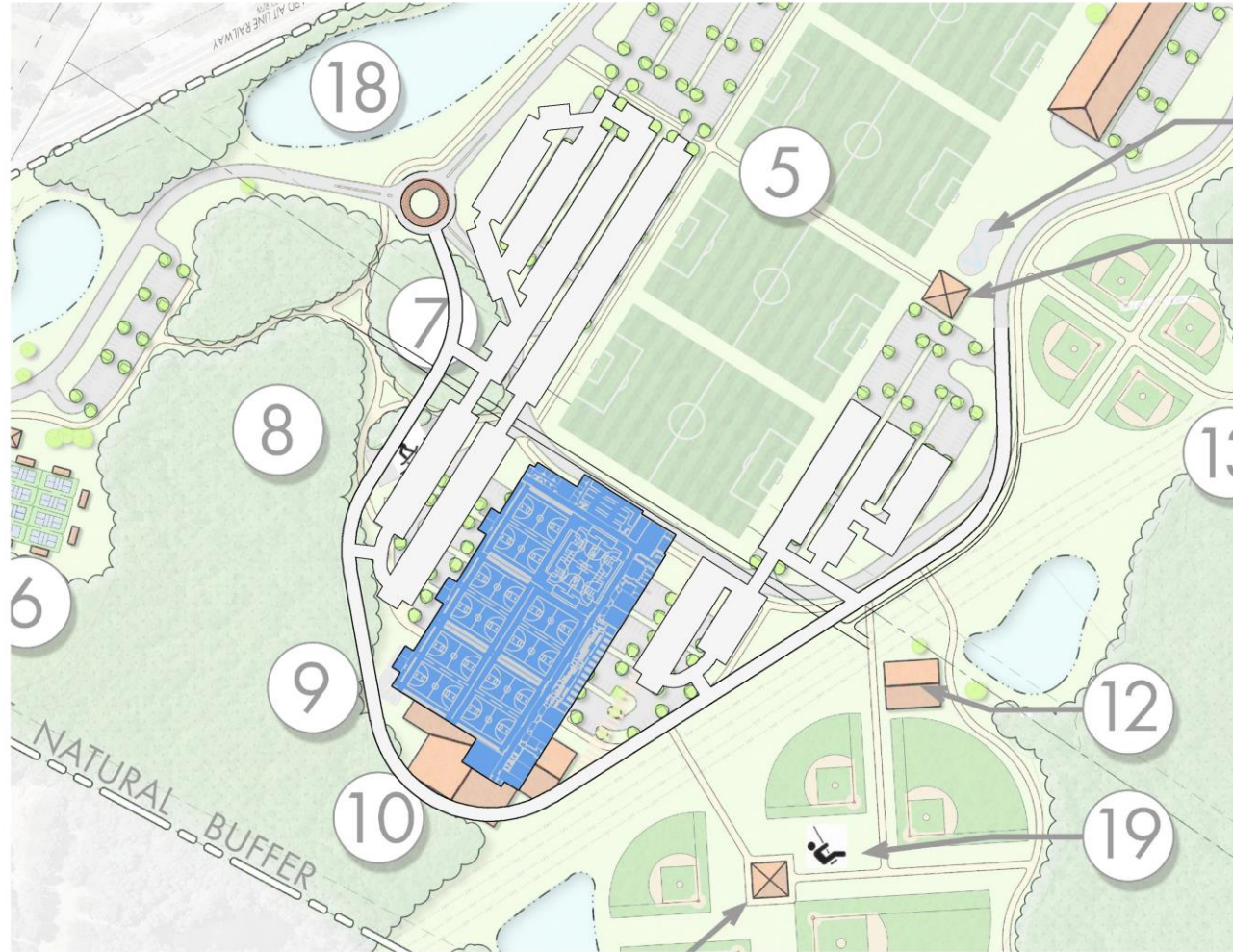


SITE ANALYSIS: Port Wentworth Site – Potential Facility Placement

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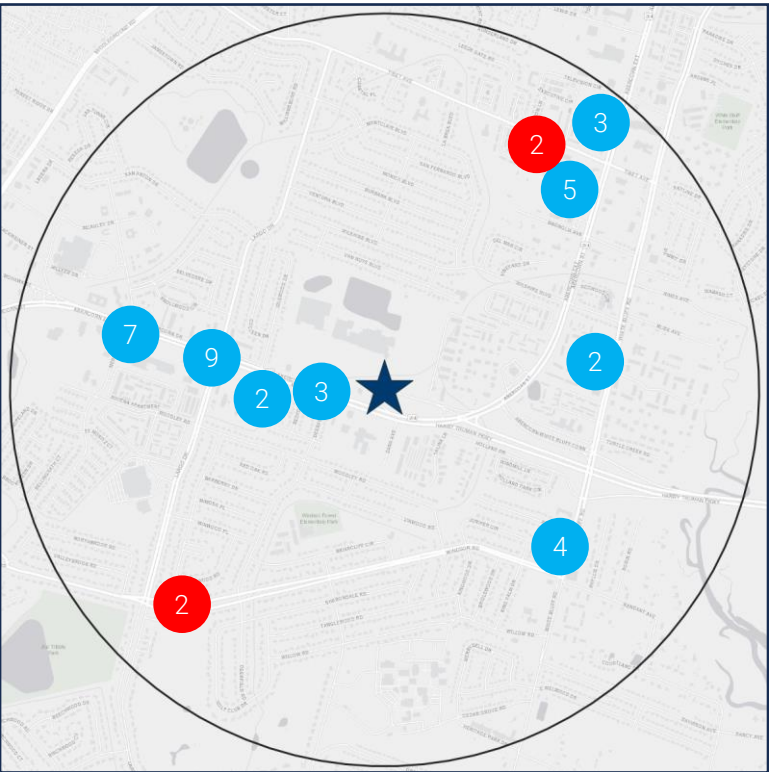
SITE ANALYSIS: Port Wentworth Site – Potential Facility Layout



SITE ANALYSIS: Potential Sites Amenities within 1-Mile

The exhibits below present a comparison among the hotel, attractions, and dining inventory within one-mile of the three potential sites for an Indoor Youth Sports Complex in Chatham County. As presented, the Southchase site offers the most robust inventory of hospitality amenities within one-mile, with 35 dining options and four attractions.

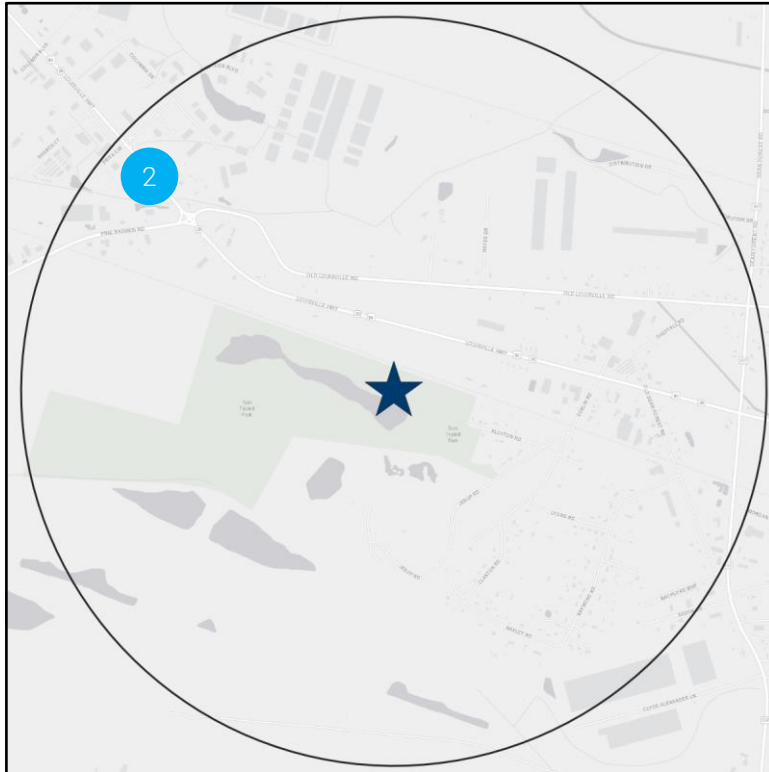
Southchase



Southchase Attractions and Amenities
Total Count and Definition within 1 mile of the Site
Source: Chatham County, Esri, Data Axle, CSL research, facility interviews, Google maps, 2023.

- 35** Dining Options (Number of establishments)
- 4** Attractions (Total Count)
- 0** Hotels (Number of Rooms)

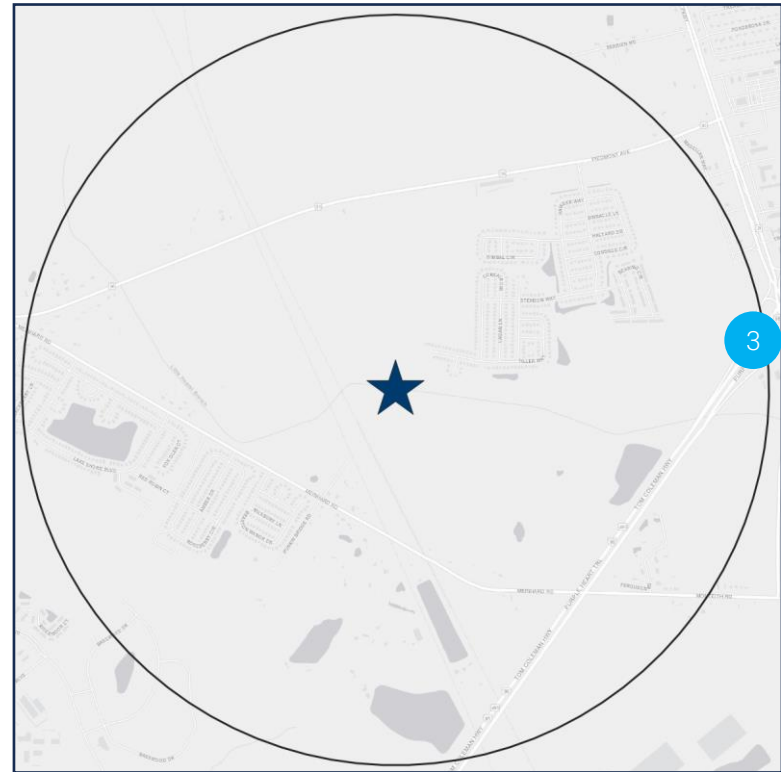
Tom Triplett Park



Tom Triplett Park Attractions and Amenities
Total Count and Definition within 1 mile of the Site
Source: Chatham County, Esri, Data Axle, CSL research, facility interviews, Google maps, 2023.

- 2** Dining Options (Number of establishments)
- 0** Attractions (Total Count)
- 0** Hotels (Number of Rooms)

Port Wentworth Recreation Complex



Port Wentworth Recreation Complex Attractions and Amenities
Total Count and Definition within 1 mile of the Site
Source: Chatham County, Esri, Data Axle, CSL research, facility interviews, Google maps, 2023.

- 3** Dining Options (Number of establishments)
- 0** Attractions (Total Count)
- 0** Hotels (Number of Rooms)

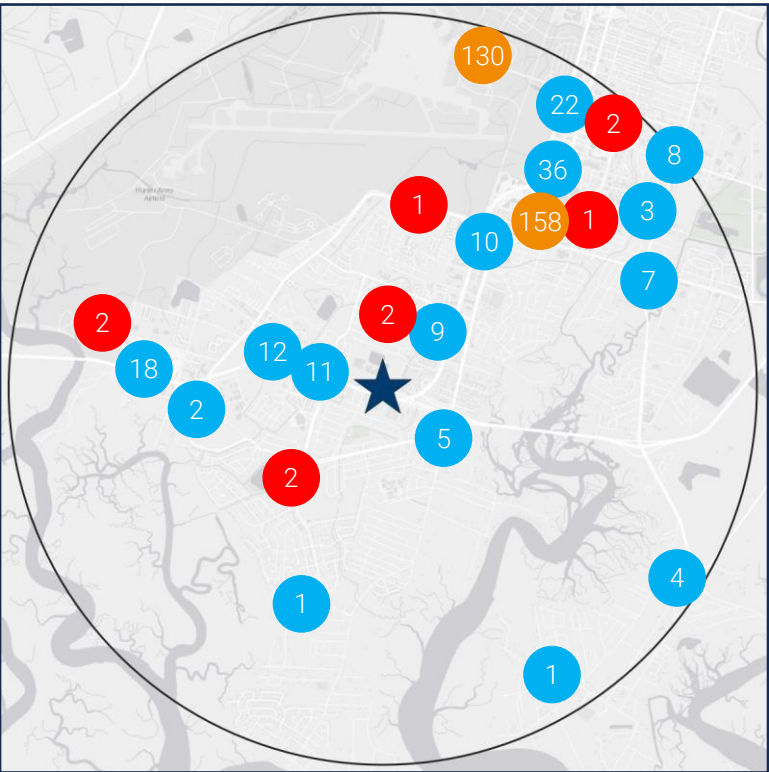
Source: Esri, Data Axle, 2023.



SITE ANALYSIS: Potential Sites Amenities within 3-Miles

The exhibits below present a comparison among the hotel, attractions, and dining inventory within three-miles of the three potential sites. As shown, the Southchase site offers 149 dining options, ten attractions and 288 sleeping rooms within three miles, while Tom Triplett Park offers 85 dining options, six attractions and 462 sleeping rooms within three miles. By comparison, there are 26 dining options, no attractions and 106 sleeping rooms within three miles of the Port Wentworth site.

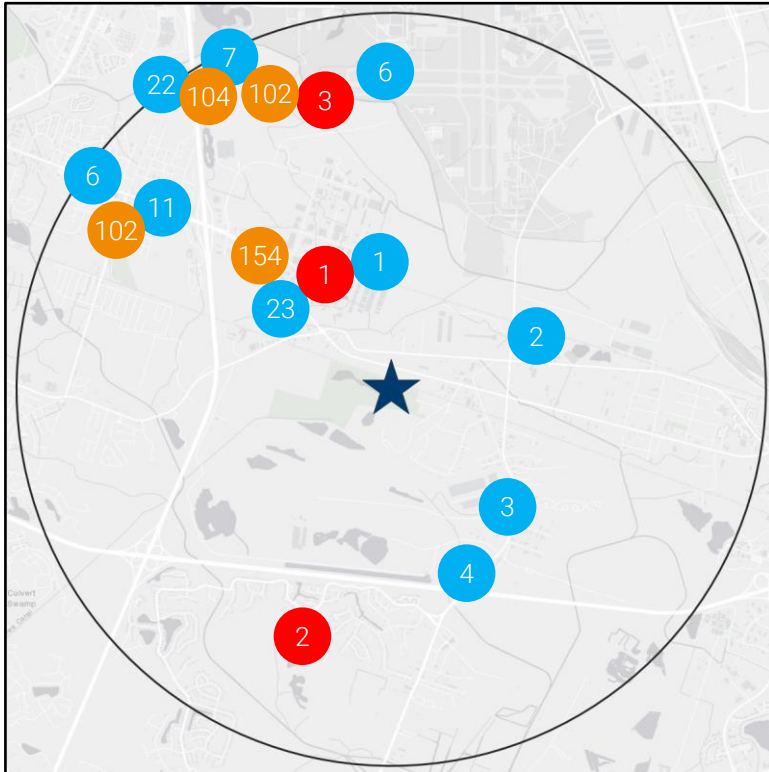
Southchase



Southchase Attractions and Amenities
Total Count and Definition within 3 miles of the Site
Source: Chatham County, Esri, Data Axle, CSL research, facility interviews, Google maps, 2023.

- 149** Dining Options (Number of establishments)
- 10** Attractions (Total Count)
- 288** Hotels (Number of Rooms)

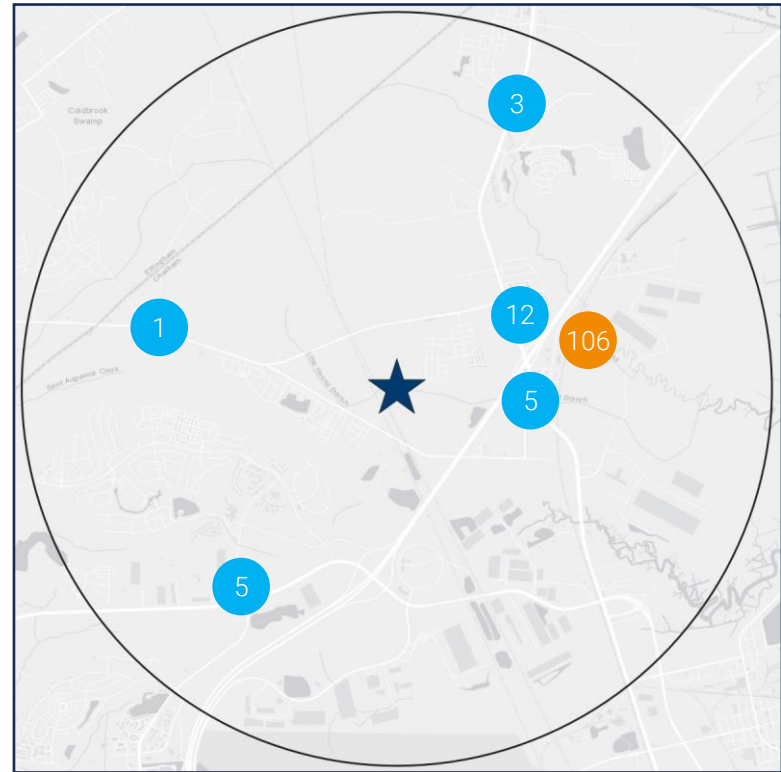
Tom Triplett Park



Tom Triplett Park Attractions and Amenities
Total Count and Definition within 3 miles of the Site
Source: Chatham County, Esri, Data Axle, CSL research, facility interviews, Google maps, 2023.

- 85** Dining Options (Number of establishments)
- 6** Attractions (Total Count)
- 462** Hotels (Number of Rooms)

Port Wentworth Recreation Complex



Port Wentworth Recreation Complex Attractions and Amenities
Total Count and Definition within 3 miles of the Site
Source: Chatham County, Esri, Data Axle, CSL research, facility interviews, Google maps, 2023.

- 26** Dining Options (Number of establishments)
- 0** Attractions (Total Count)
- 106** Hotels (Number of Rooms)

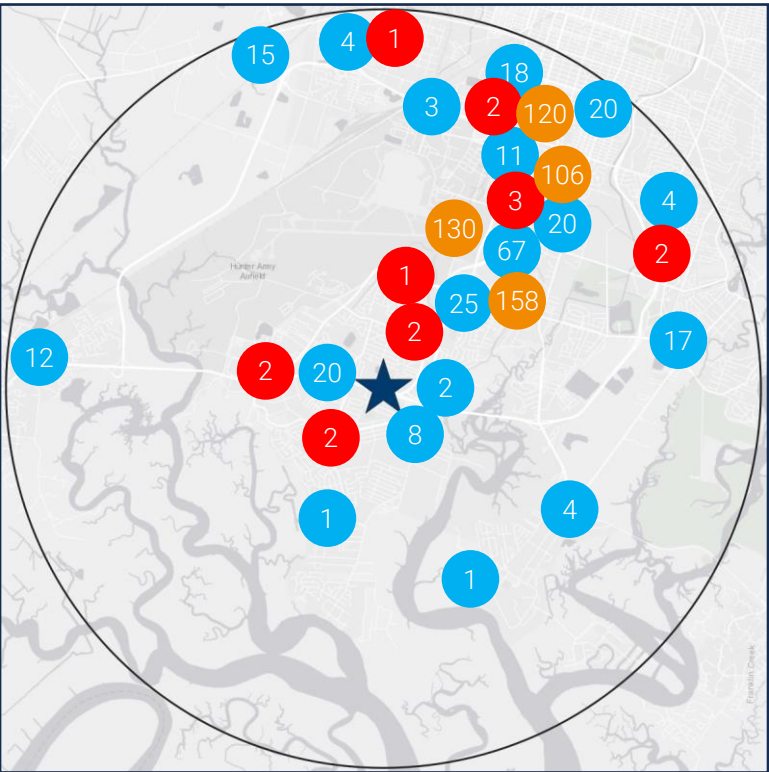
Source: Esri, Data Axle, 2023.



SITE ANALYSIS: Potential Sites Amenities within 5-Miles

Based on conversations with sports tourism event organizers, families and participants in sports tournaments, meets and competitions tend to be willing to drive up to fifteen minutes between a youth sports facility and visitor amenities. Within five miles of the Southchase site, an approximation of a fifteen minute drive, there are nearly 300 dining options, 15 attractions and over 500 sleeping rooms. By comparison, there are nearly 230 dining options, 13 attractions and 757 sleeping rooms within five miles of the Tom Triplett Park site and 133 dining options, seven attractions and 607 sleeping rooms within five miles of the Port Wentworth site.

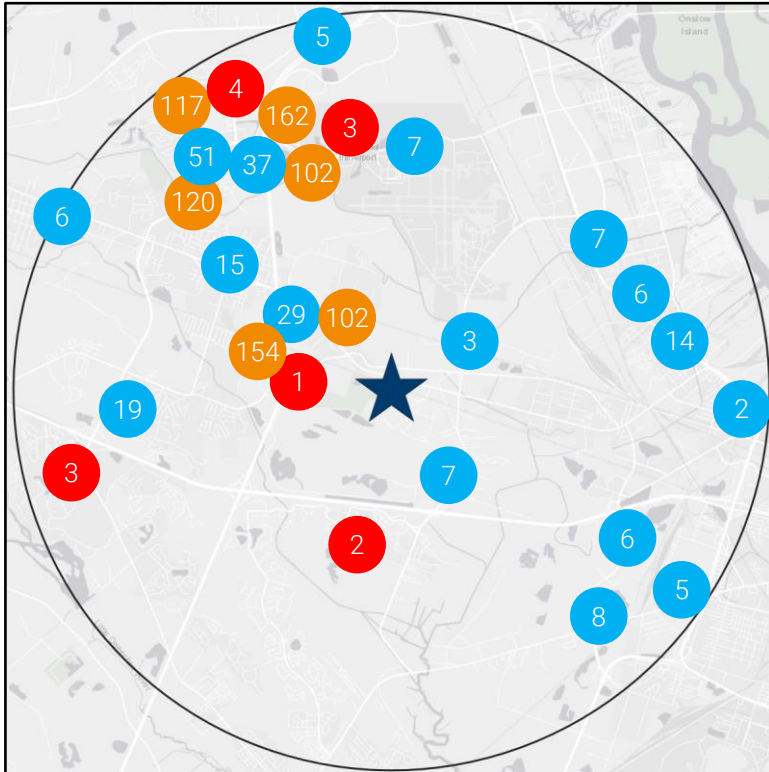
Southchase



Southchase Attractions and Amenities
Total Count and Definition within 5 miles of the Site
Source: Chatham County, Esri, Data Axle, CSL research, facility interviews, Google maps, 2023.

- **292** Dining Options (Number of establishments)
- **15** Attractions (Total Count)
- **514** Hotels (Number of Rooms)

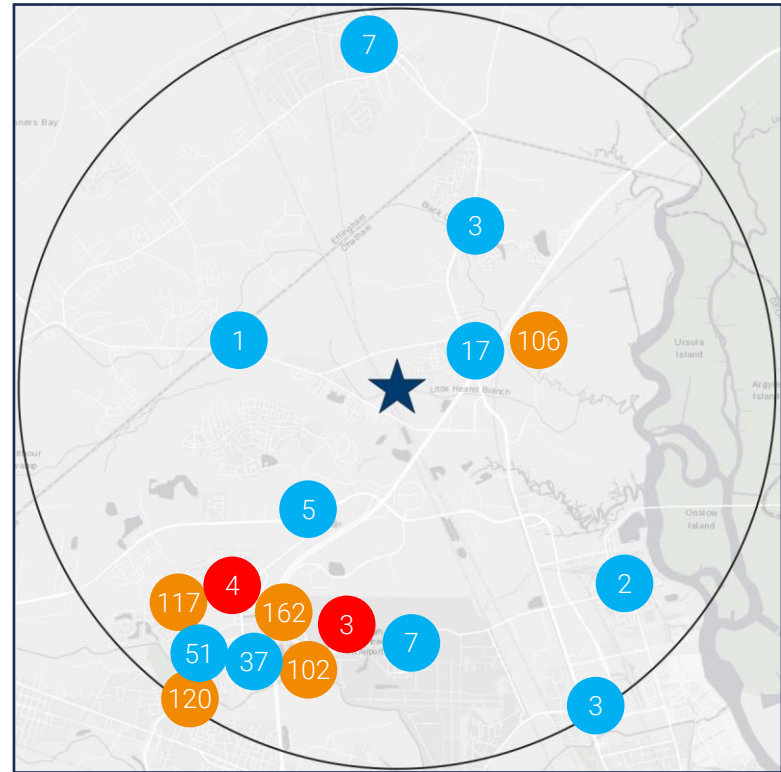
Tom Triplett Park



Tom Triplett Park Attractions and Amenities
Total Count and Definition within 5 miles of the Site
Source: Chatham County, Esri, Data Axle, CSL research, facility interviews, Google maps, 2023.

- **227** Dining Options (Number of establishments)
- **13** Attractions (Total Count)
- **757** Hotels (Number of Rooms)

Port Wentworth Recreation Complex



Port Wentworth Recreation Complex Attractions and Amenities
Total Count and Definition within 5 miles of the Site
Source: Chatham County, Esri, Data Axle, CSL research, facility interviews, Google maps, 2023.

- **133** Dining Options (Number of establishments)
- **7** Attractions (Total Count)
- **607** Hotels (Number of Rooms)

Source: Esri, Data Axle, 2023.



SITE ANALYSIS: Demographic Comparison

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One-Mile Radius

DEMOGRAPHIC VARIABLE	Site 1 - Southchase	Site 2 - Tom Triplett	Site 3 - Port Wentworth
POPULATION:			
2023 Total Population	13,024	438	4,488
2028 Total Population (Projected, Esri)	13,055	429	4,518
Historical Annual Growth Rate (2010 to 2020)	0.6%	4.1%	6.0%
Projected Annual Growth Rate (2023 to 2028)	0.1%	-0.4%	0.1%
AGE DISTRIBUTION:			
Under 15	16.9%	19.9%	25.0%
15 to 24	14.9%	11.2%	10.3%
25 to 34	19.7%	14.4%	17.0%
35 to 44	13.4%	15.8%	21.5%
45 to 54	9.9%	12.3%	11.0%
55 and over	25.3%	26.7%	15.2%
HOUSEHOLD INCOME:			
Median Household Income	\$55,248	\$84,146	\$87,516
Per Capita Income	\$29,368	\$39,026	\$41,646
INCOME DISTRIBUTION:			
\$0 to \$24,999	21.3%	6.4%	4.3%
\$25,000 to \$49,999	23.4%	31.2%	10.9%
\$50,000 to \$74,999	27.9%	10.4%	9.0%
\$75,000 to \$99,999	12.4%	7.2%	46.0%
\$100,000 to \$149,999	11.2%	5.6%	17.4%
\$150,000 or more	3.9%	40.0%	12.5%
POPULATION BY RACE/ETHNICITY:			
White/Caucasian	34.9%	48.4%	25.9%
Black/African American	47.0%	31.7%	60.1%
American Indian	0.2%	0.5%	0.4%
Asian	4.6%	3.7%	1.5%
Pacific Islander	0.3%	0.2%	0.1%
Other Race	4.8%	6.2%	4.3%
Two or More Races	8.2%	9.4%	7.6%
Hispanic Origin	9.7%	12.1%	9.3%
Diversity Index	70.8	72.5	63.7
BUSINESS:			
Total Business 2023	350	152	8
Total Employees 2021	82,657	2,691	73
Employee to Residential Population Ratio	0.61:1	6.14:1	0.02:1
SPENDING PATTERNS:			
2023 Fees for Participant Sports Excluding Trips	\$406,083	\$19,497	\$216,684
2023 Entertainment/Recreation Fees & Admissions	\$2,442,842	\$112,828	\$1,256,873
2023 Average Spending on Retail Goods	\$18,155	\$26,608	\$313,714

Three-Mile Radius

DEMOGRAPHIC VARIABLE	Site 1 - Southchase	Site 2 - Tom Triplett	Site 3 - Port Wentworth
POPULATION:			
2023 Total Population	43,820	14,034	21,789
2028 Total Population (Projected, Esri)	44,049	13,909	23,265
Historical Annual Growth Rate (2010 to 2020)	0.2%	1.7%	8.8%
Projected Annual Growth Rate (2023 to 2028)	0.1%	-0.2%	1.3%
AGE DISTRIBUTION:			
Under 15	17.5%	20.7%	24.9%
15 to 24	14.7%	11.3%	10.8%
25 to 34	17.3%	14.2%	16.8%
35 to 44	13.0%	15.4%	20.5%
45 to 54	9.5%	12.3%	11.2%
55 and over	28.0%	26.2%	15.8%
HOUSEHOLD INCOME:			
Median Household Income	\$55,634	\$77,135	\$87,778
Per Capita Income	\$31,365	\$40,407	\$42,595
INCOME DISTRIBUTION:			
\$0 to \$24,999	19.9%	9.9%	8.0%
\$25,000 to \$49,999	26.1%	20.2%	11.8%
\$50,000 to \$74,999	22.9%	16.5%	18.8%
\$75,000 to \$99,999	10.9%	13.0%	29.1%
\$100,000 to \$149,999	12.7%	20.7%	18.7%
\$150,000 or more	7.4%	19.9%	13.6%
POPULATION BY RACE/ETHNICITY:			
White/Caucasian	42.9%	48.4%	37.7%
Black/African American	39.2%	27.8%	45.3%
American Indian	0.4%	0.8%	0.3%
Asian	4.4%	4.3%	3.4%
Pacific Islander	0.3%	0.2%	0.1%
Other Race	5.2%	9.8%	4.5%
Two or More Races	7.7%	8.8%	8.6%
Hispanic Origin	10.3%	17.5%	10.5%
Diversity Index	71.6	76.5	70.9
BUSINESS:			
Total Business 2023	2,364	935	275
Total Employees 2021	28,441	15,415	577
Employee to Residential Population Ratio	0.65:1	1.10:1	0.03:1
SPENDING PATTERNS:			
2023 Fees for Participant Sports Excluding Trips	\$1,512,420	\$652,206	\$1,166,043
2023 Entertainment/Recreation Fees & Admissions	\$8,925,704	\$3,837,781	\$6,763,835
2023 Average Spending on Retail Goods	\$20,273	\$27,354	\$30,165

Five-Mile Radius

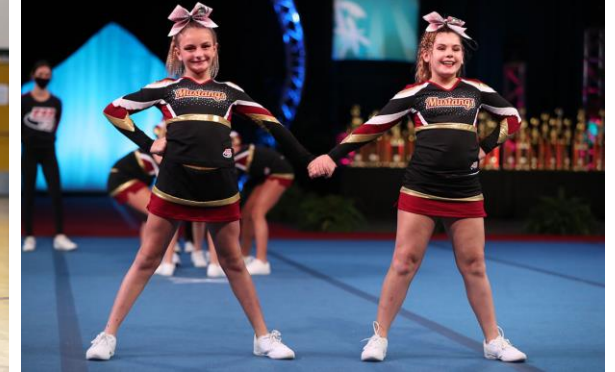
DEMOGRAPHIC VARIABLE	Site 1 - Southchase	Site 2 - Tom Triplett	Site 3 - Port Wentworth
POPULATION:			
2023 Total Population	86,114	61,209	45,307
2028 Total Population (Projected, Esri)	86,350	64,066	47,660
Historical Annual Growth Rate (2010 to 2020)	0.0%	2.0%	5.2%
Projected Annual Growth Rate (2023 to 2028)	0.1%	0.9%	1.0%
AGE DISTRIBUTION:			
Under 15	18.1%	20.7%	22.2%
15 to 24	13.8%	11.4%	11.1%
25 to 34	16.1%	16.2%	16.7%
35 to 44	12.8%	17.5%	19.4%
45 to 54	9.8%	11.9%	11.9%
55 and over	29.4%	22.4%	18.7%
HOUSEHOLD INCOME:			
Median Household Income	\$57,525	\$73,872	\$87,517
Per Capita Income	\$33,926	\$39,025	\$42,687
INCOME DISTRIBUTION:			
\$0 to \$24,999	19.6%	14.5%	10.2%
\$25,000 to \$49,999	25.3%	21.0%	10.5%
\$50,000 to \$74,999	20.9%	17.0%	20.6%
\$75,000 to \$99,999	11.9%	14.3%	22.8%
\$100,000 to \$149,999	13.4%	18.4%	19.8%
\$150,000 or more	9.0%	14.8%	16.1%
POPULATION BY RACE/ETHNICITY:			
White/Caucasian	43.2%	44.7%	49.0%
Black/African American	41.9%	35.7%	34.0%
American Indian	0.3%	0.6%	0.4%
Asian	3.2%	5.0%	4.0%
Pacific Islander	0.3%	0.2%	0.1%
Other Race	4.3%	6.7%	4.0%
Two or More Races	6.9%	7.3%	8.4%
Hispanic Origin	8.8%	12.6%	9.7%
Diversity Index	69.0	73.5	69.7
BUSINESS:			
Total Business 2023	4,127	3,258	1,407
Total Employees 2021	49,867	50,674	24,771
Employee to Residential Population Ratio	0.58:1	0.82:1	0.55:1
SPENDING PATTERNS:			
2023 Fees for Participant Sports Excluding Trips	\$3,233,677	\$2,745,760	\$2,333,248
2023 Entertainment/Recreation Fees & Admissions	\$19,018,396	\$16,086,159	\$13,533,425
2023 Average Spending on Retail Goods	\$22,182	\$27,212	\$31,204

Source: Esri, Data Axle, 2023.



SITE ANALYSIS: Demographic Comparison Key Takeaways

- The Southchase site offers a larger population within one-, three- and five-miles than the Tom Triplett Park and Port Wentworth sites.
- The total number of people under the age of 25 within one-, three- and five-miles of the Southchase site is greater than those surrounding the Tom Triplett and Port Wentworth sites.
- The area surrounding the Southchase site has the lowest median income among the three potential sites.
- Approximately 66 percent of households within five-miles of the Southchase site generate income of less than \$75,000. By comparison, approximately 53 percent and 41 percent of households within five-miles of the Tom Triplett Park and Port Wentworth sites, respectively, generate income of less than \$75,000.
- There are a greater percentage of non-Caucasian people within one- and three-miles of the Port Wentworth site than the other two sites considered, while there are a greater percentage of non-Caucasian people within five-miles of the Southchase site.
- There are more total businesses within one-, three- and five-miles of the Southchase site than surrounding the Tom Triplett Park or Port Wentworth sites.
- There is a greater amount of spending for participant sports, excluding trips, on entertainment/recreation fees and admissions and on retail per resident within one-, three- and five miles of the Port Wentworth site than either of the other two sites.



SITE ANALYSIS: Site Matrix Scoring

Weighted site evaluation criteria were utilized and criteria scores were determined for the subject sites. The resultant scores were then summed and evaluated in terms of the adherence to best practices pertaining to sites typically preferred throughout the sports tourism industry.

Based on these criteria factors, the candidate sites were evaluated using a site evaluation matrix. The site evaluation matrix contains 18 variables which are believed to impact a site's suitability for optimally supporting a sports tourism complex. The site is rated for each variable on a scale of "0" to "5," where "0" represents a complete lack of responsiveness to the criteria listed. A score of "5" represents an optimum condition where the greatest possible success is likely to be realized. Scores between "0" and "5" represent a range of conditions that are progressively better for sports/recreation facility development.

Through our experience, comparable facility/site benchmarking and research into industry best practices, CSL and CHA have identified that certain factors weigh higher or lower to sports groups, participants and spectators in terms of "desirability" of facility sites and destinations. Raw scores have been weighted with the users' point of view for desirable facility sites/destinations.

The exhibit on the following page presents the site matrix analysis results for the qualifying candidate sites for a new Indoor Youth and Amateur Sports Complex in Chatham County. A weighted score of 625 is the maximum possible score. Typically, total scores above 440 are considered "excellent/very good", indicating the subject site has strong potential as a successful host for the project. Scores between 375 and 440 are considered "good". Scores between 310 and 375 are acceptable but suggest certain challenges and/or limitations exist.

IMPORTANT SITE CHARACTERISTICS & FACTORS

A large number of characteristics and factors are typically important when evaluating the attractiveness of a site location. These include, but are not limited to:

- Size, cost, and ownership complexity of site.
- Nearby accessibility to major interstates/roadways.
- Driving proximity to primary population concentrations.
- Ability to leverage existing infrastructure/prior investment.
- Requirements/preferences of a private partner.
- Proximity to quality hotel inventory.
- Proximity to restaurants, retail, nightlife, and entertainment.
- Parking availability.
- Ingress/egress.
- Site visibility.
- Synergy with other public sector initiatives/master plans.
- Compatibility with surroundings.

SITE ANALYSIS: Revised Site Scoring Matrix

		Southchase		Tom Triplett Park		Port Wentworth Rec Complex	
Owner		Chatham County		Chatham County		Port Wentworth	
Location		Southside		West Chatham		West Chatham - Port Wentworth	
Site Size (acres)		16.03		177.6		200+	
Site Elements	Weight	Score	Rating	Score	Rating	Score	Rating
Site Suitability (48%)	65						
Acreage for Optimized Program Configuration	15	75	5	75	5	75	5
Acreage for Future Expansion	7	14	2	28	4	14	2
Acreage for Additional Onsite Complementary Devlpmt	5	10	2	25	5	20	4
Attractiveness of the Site to Users & Stakeholders	12	48	4	60	5	60	5
Land Acquisition Costs	4	20	5	12	3	16	4
Single vs Multiple Land Parcels	3	15	5	15	5	15	5
Magnitude of Necessary Infrastructure Improvements	4	16	4	12	3	16	4
Local Accessibility	5	25	5	20	4	15	3
Visibility	5	25	5	20	4	20	4
Regional Accessibility	5	20	4	25	5	25	5
Amenity Availability (41%)	44						
Proximity to Restaurants	10	50	5	30	3	20	2
Proximity to Shopping/Retail	8	40	5	24	3	24	3
Proximity to Entertainment/Attractions	7	35	5	21	3	21	3
Proximity to Nearest Hotel	7	35	5	35	5	21	3
Proximity to Overall Hotel Inventory	12	60	5	60	5	60	5
Community Surroundings (11%)	16						
Compatibility with Neighborhood	6	24	4	30	5	30	5
Synergy with Surroundings/Setting	5	15	3	20	4	25	5
Opportunity for Induced Economic Development	5	20	4	20	4	20	4
Total Weighting (100%)	125						
TOTAL SCORE		547		532		497	
SITE RANK		1		2		3	